



Description: This document gives a quick introduction to ReportWorX.NET, to have you running reports in no time!

OS Requirement: The operating system required is Windows XP/2000/2003.

General Requirement: Before you begin, make sure you have read and completed the ReportWorX.NET post installation steps!

Quick Diagnostic Test

Here is a quick test you can do to ensure your ReportWorX node is configured properly:

1. Start the ReportWorX.NET Configurator. If you have not yet created a configuration database, do so now by running the Configuration Database Wizard.
2. On the Configurator toolbar, you should see a traffic light icon, similar to the one in Figure 1. The traffic light should be red the first time you run the Configurator. When you click on it, it should turn green within a few seconds. If it turns yellow, you have not properly completed your DCOM configuration. If the traffic lights grays out and then returns to red, there may be a problem with the installation or registration of some of the ReportWorX.NET software components. Refer back to the **ReportWorX.NET Post Installation Steps** application note for more help.



Fig. 1: ReportWorX.NET Traffic Light Icon

3. Once your traffic light turns green, try to execute a simple report by expanding **Configurations**, **Sample Report Configuration**, **Sample Reports**, then clicking on **Sample Daily Report** (see Figure 2).

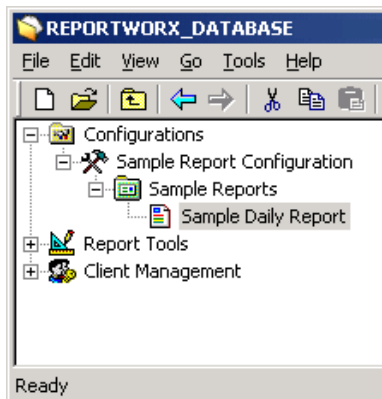


Fig. 2: Navigating to the Sample Daily Report

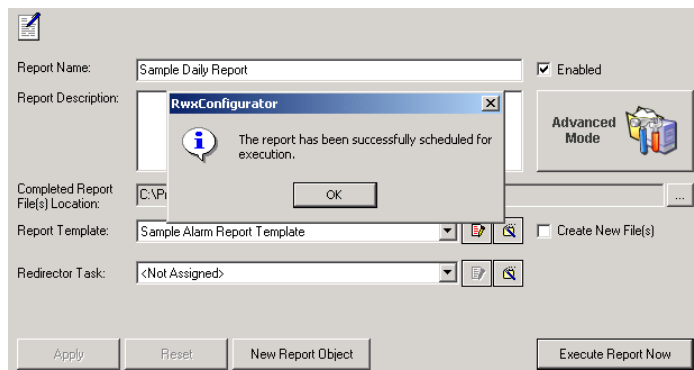


Fig. 3: Executing a Report from the Configurator

4. Now we will check if the report has completed successfully. Click on the eyeglasses icon to open Monitor View:



Fig. 4: Monitor View Icon

5. If everything went well, your screen should look something like Figure 5.

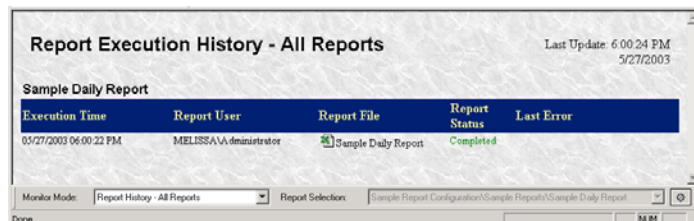


Fig. 5: Monitor View Showing a Successfully Completed Report

6. If your report is still running when you open Monitor View, give it 2 minutes to refresh. The most common error is that the ReportWorX Service Account has not been properly set up. If your Monitor View gives you an error similar to the one in Figure 6, please refer back to the **ReportWorX.NET Post Installation Steps** application note for more information.



Fig. 6: Monitor View Showing a Failed Report



Where Can I Go From Here?

Now that you have successfully started the ReportWorX Engine and have run a report, that is just the beginning! You are now free to customize your ReportWorX.NET Application however you see fit. Some of the things you will probably want to do are:

- **Add more templates** – We give you a few samples to start with, along with some pre-configured templates that you can import into your configuration. For more information on those, refer to the **ReportWorX.NET Sample Templates** application note. You may also want to create some templates specifically designed for your company.
- **Create redirector actions and tasks** – We start you off with one sample redirector task, which includes a sample email action. Consult the Help file for instructions on how to create more redirector actions and tasks, such as PDF, Printing, Faxing, and Web Publishing!

Fig. 7: Sample Email Action

- **Create scheduling triggers** – If you would like to run reports periodically, such as hourly, daily, weekly, monthly, or even yearly, you will need to create more scheduling triggers. We include one daily report trigger for you to use as a reference.

Fig. 8: Sample Daily Report Trigger

- **Set up ReportWorX.NET security** – ReportWorX security is folder-based, so we recommend that you create folders for each “group” of reports that you would like to restrict (e.g. Accounting, Marketing, Sales, Engineering, etc.) You must first register these accounts with ReportWorX through **Client Management, User Accounts Registration**, and then click on the **Permissions** button in each specific folder to restrict or allow View, Execute, and Manage permissions.

Fig. 9: Report Folder Permissions Dialog