



Congratulations on successfully installing ICONICS ReportWorX.NET! There are a few quick configuration steps that you **need** to complete before ReportWorX.NET will function properly, and they are as follows:

- Microsoft Excel Configuration
- Security Configuration
 - ReportWorX.NET Service Account
 - Printer Setup
- DCOM Configuration
 - Default Access Permissions
 - Default Launch Permissions

We encourage you to use the above outline as a checklist to make sure you have completed all of the necessary steps before attempting to run ReportWorX.NET.

1. Microsoft Excel Configuration

ReportWorX.NET utilizes MS Excel as a report template design tool as well as the final report-formatting engine. Therefore, it is critical that MS Excel be installed and configured properly to run under the dedicated ReportWorX.NET Service account. ReportWorX.NET will use MS Excel through automation, and as such, certain installation and configuration steps apply:

1. Log into the computer as the Administrator and create a new user account under which the ReportWorX.NET Service will run (if it is desired to be different than the Administrator account). We will call this account the ReportWorXUser account. Ideally this should be a domain account if ReportWorX.NET is used on a distributed data source scenario.

NOTE: If you choose to run the ReportWorX.NET Service under the account with which you normally log onto your machine AND that account is a member of the Administrators group AND that is the account under which you installed Microsoft Office, nothing further needs to be done with Excel. Proceed to Section 2 (Security Configuration).

2. Add the ReportWorXUser account to the Administrators group for the computer where ReportWorX.NET is running.
3. Log into the computer as ReportWorXUser and install (or reinstall) MS Excel (or Office).
4. Start the MS Excel application. This forces MS Excel to register itself with the ReportWorXUser account.
5. After MS Excel has started, press ALT+F11 to load the Microsoft Visual Basic for Applications (VBA) editor. This forces VBA to initialize itself.
6. Close MS Excel, including VBA

2. Security Configuration

Once you have taken care of the MS Excel Configuration, you will need to modify a few security settings. First you need to set up the ReportWorX.NET Service.

2.1. ReportWorX.NET Service Account

By default the ReportWorX.NET Service is created under the **Local System** account, which does not have access to remote COM servers (such as OPC servers), printers and other resources to which the ReportWorX.NET Service needs access. In addition, Microsoft Excel will not run properly and may disable the ReportWorX.NET Service. That is why you created the ReportWorXUser account in Section 1.



NOTE: On Windows XP, Administrative accounts require a password in order to run as a service (i.e. the Administrator password cannot be blank).

1. Go to the Windows Control Panel (**Start > Settings > Control Panel**) and double click on **Administrative Tools/Services**. This opens the Windows Services Control Manager, as shown in Figure 1.
2. Right-click the “ICONICS ReportWorX.NET” service and select **Properties** from the pop-up menu, as shown in Figure 1.

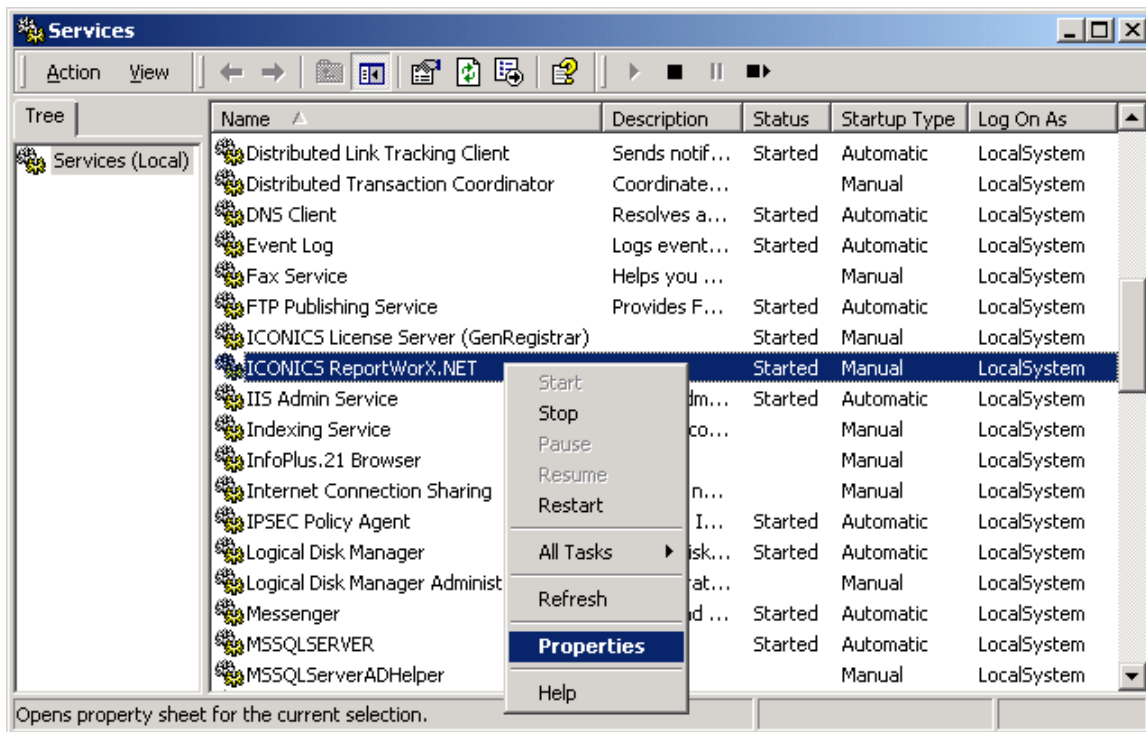


Fig. 1: Windows Services Control Manager

3. Go to the **Log On** tab in the Properties dialog box and select **This Account**, as shown in Figure 2. Enter the name and password for the ReportWorXUser account. Click the **Apply** button.

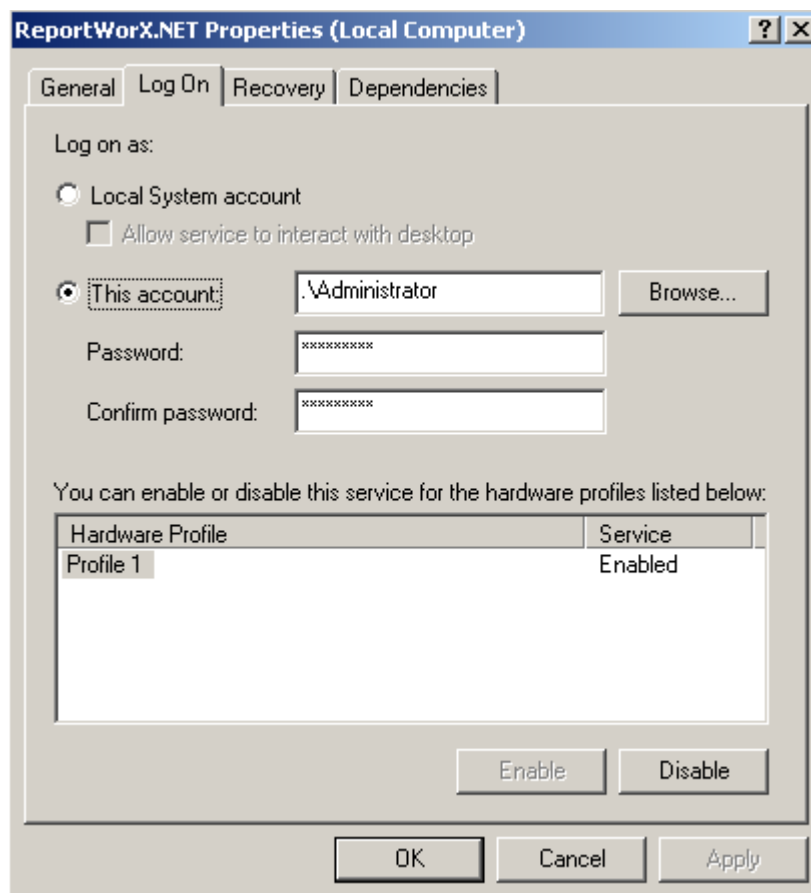


Figure 2: Setting up the ReportWorX.NET Service Account

4. The ReportWorXUser account is added to the ReportWorX.NET Service account in the Windows Services Control Manager, as shown in Figure 3.
5. Exit the Windows Services Control Manager.

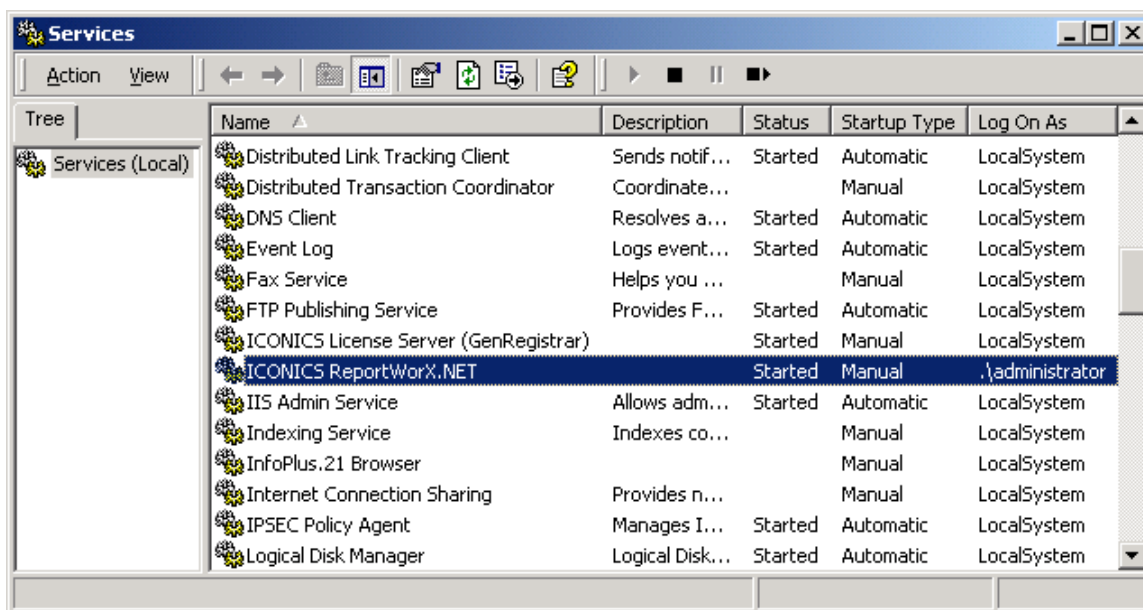


Figure 3: Running the ReportWorX.NET Service as Administrator

2.2 Printer Setup

Next, you need to give the ReportWorXUser account access to any printer that the ReportWorX.NET service will utilize for report printing. If you do not plan on printing any reports using ReportWorX.NET, skip this step and go on to Section 3 (DCOM Configuration).

1. Go to the Windows **Control Panel** and select **Printers**. This opens the Windows Printer Manager, as shown in Figure 4.
2. Right-click on a printer that you will be using for reporting and select **Properties** from the pop-up menu, as shown in Figure 4.

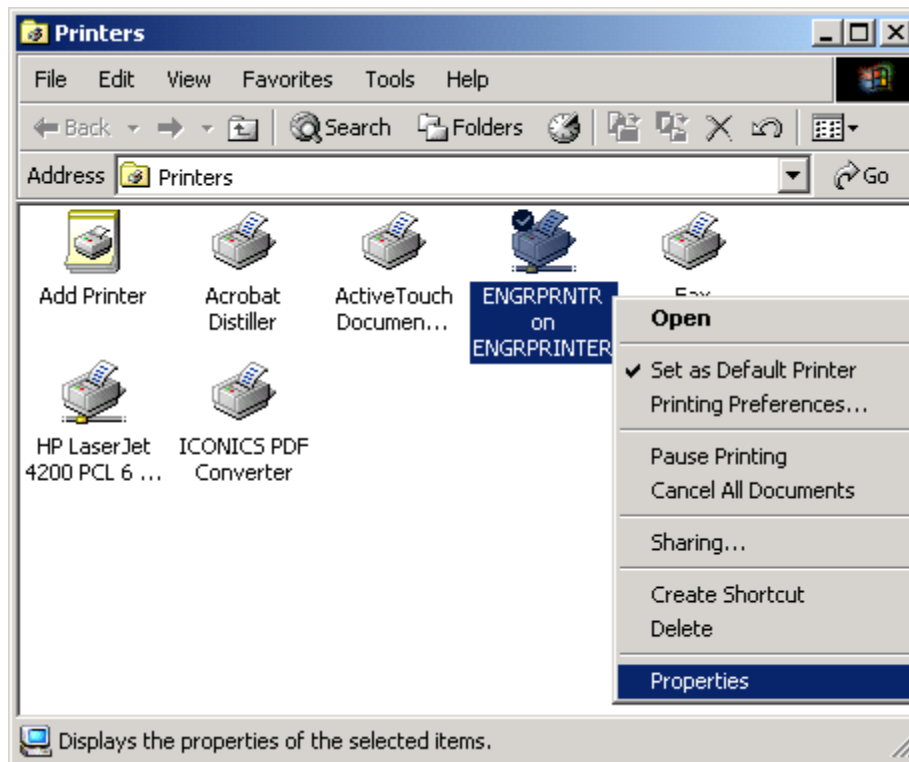


Figure 4: Windows Printer Manager

3. Go to the **Security** tab in the Properties dialog box to set up security for the printer as shown in Figure 5. The ReportWorXUser account requires **Print**, **Manage Printers** and **Manage Documents** access. If this account is not present, click the **Add** button to manually add it and properly configure its access rights to printer.

NOTE: If you do not see a **Security** tab in your printer Properties dialog box (on Windows XP or 2003), you need to change a setting in your **Folder Options**. Go to **Tools > Folder Options**, and then click on the **View** tab. Scroll down to the bottom, uncheck the box that says **Use simple file sharing (Recommended)** and click **OK**. You can now go back and complete Step 3.

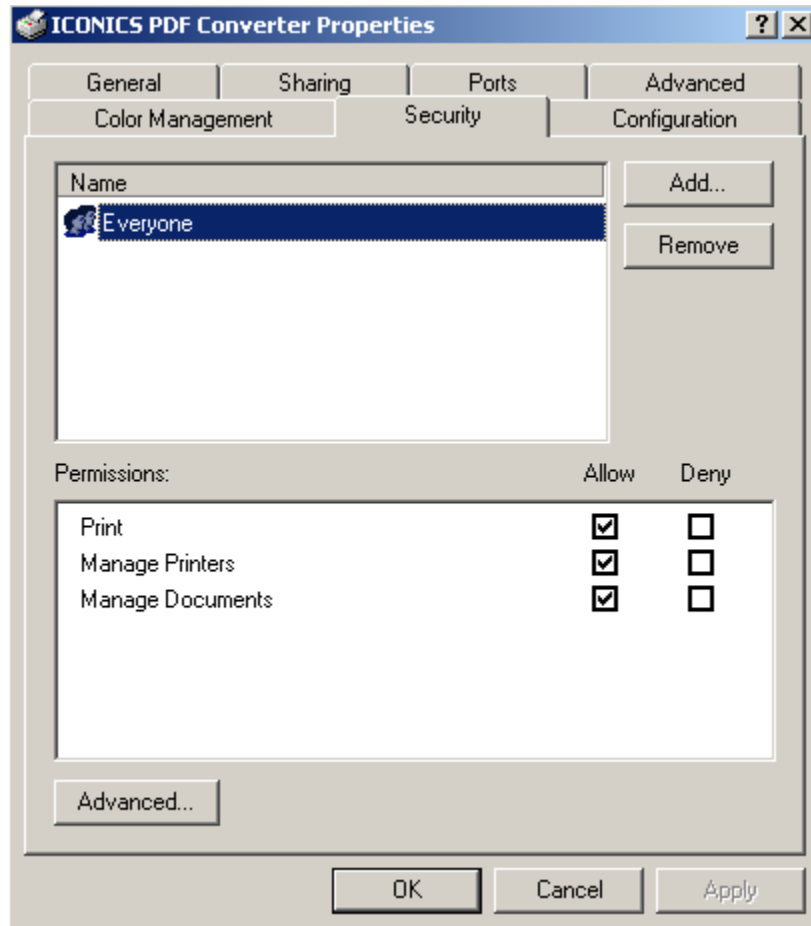


Figure 5: Printer Security Settings Dialog

4. Repeat the above procedure for each printer to be used by ReportWorX.NET.
5. Click the **Apply** button.

3. DCOM Configuration

The ReportWorX.NET Service will interface to the ICONICS GenRegistrar server for licensing and event reporting tasks. It is important that the ReportWorXUser account has access to the GenRegistrar server as well to other COM servers such as OPC, ICONICS Language Server etc. Modify the default DCOM settings to give the ReportWorXUser account the required DCOM rights.

1. Click **Start**, and then **Run** from the Windows Start Menu.
2. In the Run dialog box, type **dcomcnfg** in the **Open** field and click **OK**, as shown in Figure 6.

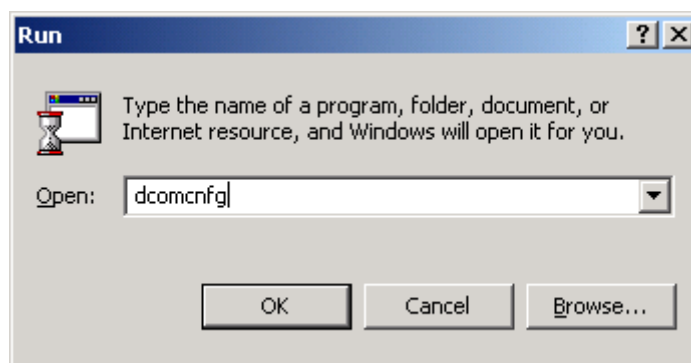


Figure 6: Starting DCOM Configuration

3. On Windows 2000, you may see a dialog similar to the one in Figure 7. Click **No** to dismiss any such dialogs that may pop up. Then skip ahead to step 7.

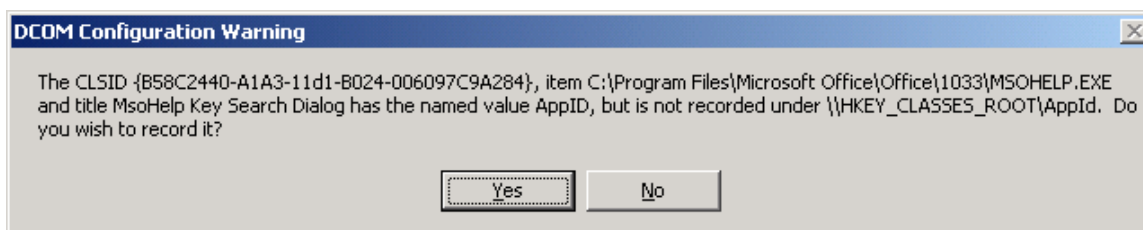


Figure 7: Windows 2000 DCOM Configuration Warning Messages

4. On Windows XP or 2003, the Component Services Manager will appear.
5. Click on **Component Services**, then double click on **Computers** on the right-hand side, then double click on **My Computer**. Your Component Services window should now look like Figure 8.

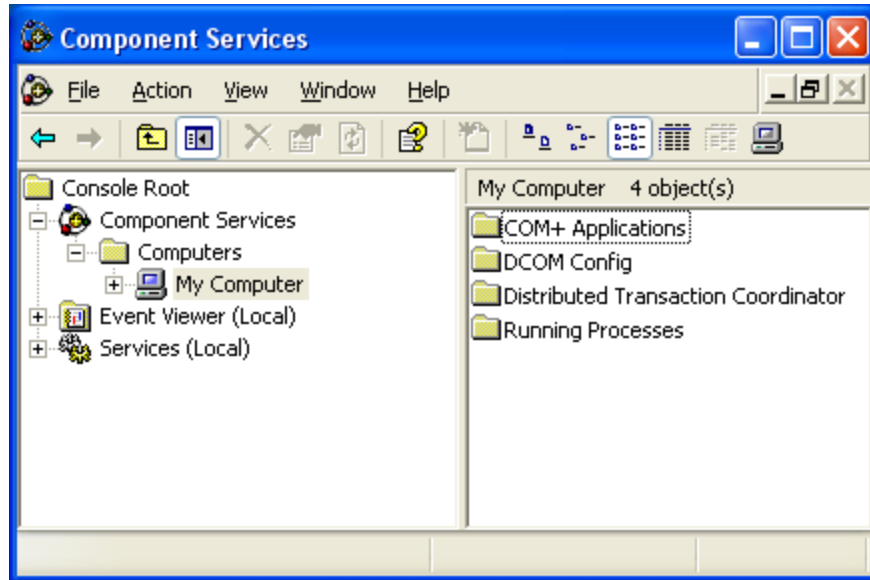


Figure 8: Windows XP Component Services Dialog

- 6. Right click on **My Computer** and select **Properties**, then click on the **Default COM Security** tab, as shown in Figure 9.

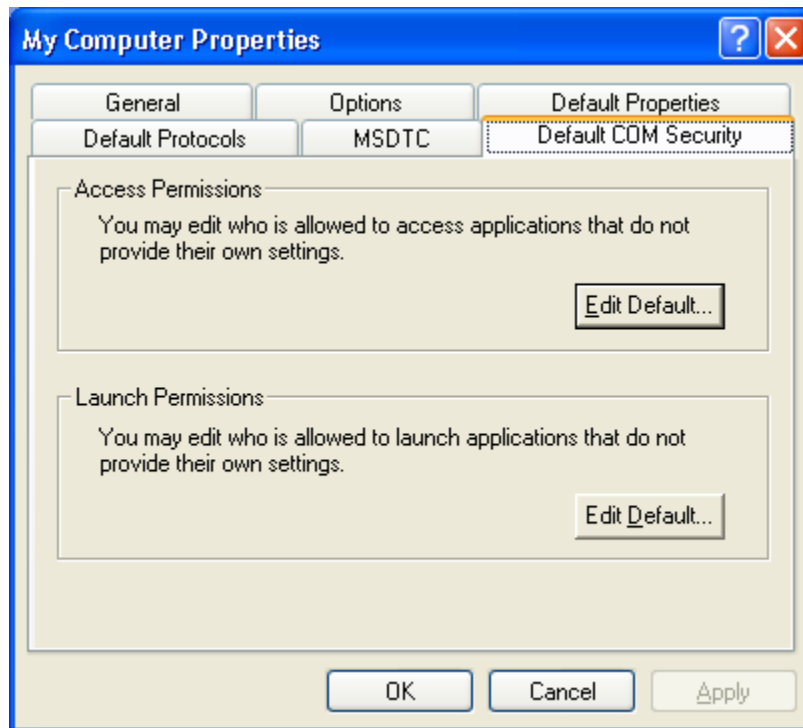


Figure 9: Default COM Security Tab on Windows XP



7. Under **Access Permissions**, click **Edit Default**. Ensure that the ReportWorXUser account has proper DCOM Access permissions. If the account is not present, add it to the list by clicking **Add**. Repeat this step for **Launch Permissions** as well.

NOTE: On Windows XP or 2003, after clicking on **Add**, to browse for your ReportWorXUser account, click on the **Advanced** button in the bottom left corner of the **Select Users or Groups** dialog, as shown in Figure 10. Then click on **Find Now** to list all of the accounts available on your computer, choose the ReportWorXUser account and click **OK**, as shown in Figure 11.

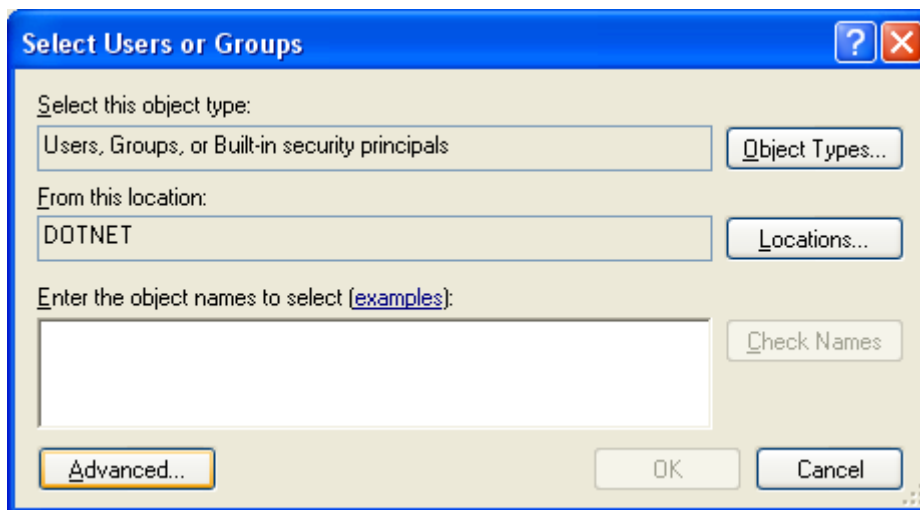


Figure 10: Browsing for a User Account on Windows XP (Step 1)

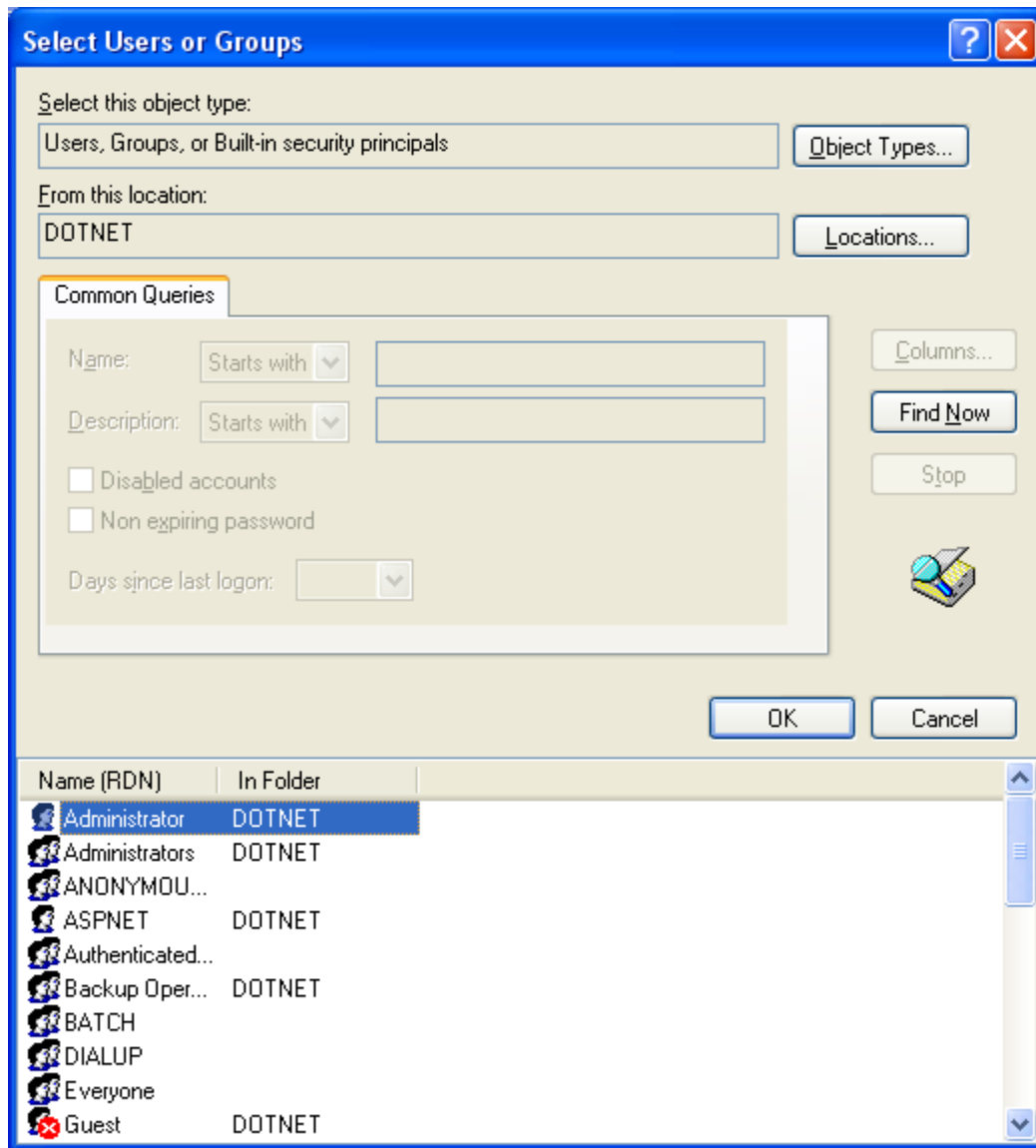


Figure 11: Browsing for a User Account on Windows XP (Step 2)

8. After you have added your ReportWorXUser account to both the default access and default launch permissions, reboot your computer. You are now ready to start using ReportWorX.NET!