



IoTWorkX
Getting Started
Version 10.97

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1 **IoTWORX OVERVIEW**

IoTWorX bridges the gap between an on-premises communications networks and an Azure cloud-based deployment platform. The IoT gateway, which can be considered an “Edge Device”, provides data connectivity between on-premises end devices and the cloud. Targeting process, factory, and building automation as well as other industries, IoTWorX installs with on-premises communications includes BACnet, SNMP, Modbus, and OPC. The cloud communication path is highly secure and is based on Advanced Message Queuing Protocol (AMQP) and a publish/subscribe (“pub/sub”) mechanism.

IoTWorX provides manufacturers and facility managers with a flexible platform to create Internet of Things applications. ICONICS offers several key IoT technologies, including rich connectivity to things (OPC, OPC UA, BACnet, SNMP, Modbus), secure cloud communications, and built-in real-time visualization and analytics. With simple setup and configuration, users can easily create remote monitoring and analytics solutions that meet their innovative business requirements for collaboration and shared insight across widely dispersed assets. The ICONICS IoT solution leverages the Azure cloud to provide global visibility, scalability, and reliability. Connect to standard ICONICS applications in the cloud such as GENESIS64, Hyper Historian, AnalytiX, and more. Optionally integrate Microsoft Azure services such as Power BI and Machine Learning to provide greater depth of analyses.

2 **SYSTEM REQUIREMENTS**

Your system must meet the minimum requirement before you can install IoTWorX.

Before installing any products please make sure you have the correct prerequisites installed.

ICONICS Suite

ICONICS advanced visualization, productivity, and sustainability solutions are built on its flagship products: GENESIS64™ HMI/SCADA, Hyper Historian™ plant historian, AnalytiX® solution suite and MobileHMI™ mobile apps. ICONICS is leading the way in cloud-based solutions with IoTWorX™, which helps customers embrace the Internet of Things (IoT) and Industry 4.0. This end-to-end software solution provides remote cloud monitoring and analytics via low-cost IoT gateway devices. Delivering information anytime, anywhere, ICONICS solutions scale from the smallest standalone embedded projects to the largest enterprise applications.

System Requirements

CPU

Intel Atom 38xx Dual Core, ARM32v7 Dual Core, or comparable processor

Memory

2 GB of RAM is required (4 GB Recommended)

Note: It is recommended that the system page file size be a minimum of four (4) times the size of installed (physical) RAM.

Note: It is recommended that the virtual memory allotment be two times the amount of physical memory (RAM) on the system.

Hard Disk

At least 32 GB free hard disk space is required (SSD preferable)

Operating Systems

- Raspbian-stretch (ARM32)
- Ubuntu 16.04 (AMD64)
- Ubuntu 18.04 (AMD64)
- Ubuntu Server 16.04 (AMD64)
- Ubuntu Server 18.04 (AMD64)

NOTE: The requirements described above are based on typical applications. Depending on your specific application, the minimum requirements may vary.

Required Hardware

- Ethernet adapter, WiFi card, or cellular 3G/4G

Azure Service

Azure IoT Hub (tier S1 or higher), Azure Storage Account

3 ICONICS SOFTWARE LICENSING

3.1 ICONICS Web Licensing Utility

The ICONICS Web Licensing Utility is the tool used to activate new licenses, add products to existing licenses, and kill licenses. The cloud licensing capability for ICONICS licensing requires that the machine with ICONICS products installed on it to have an internet connection available. The Web Licensing Utility steps do not need to be performed on the machine to be licensed.

3.2 How Cloud Licensing Works

ICONICS Cloud Licensing is a means of licensing ICONICS products that is specifically designed for applications running on public cloud, private cloud, or virtualized environments. Rather than maintaining the license locally on the machine, licenses are hosted by ICONICS on a publicly-accessible data center.

During normal operations of the licensed machine, the first action it takes when starting up is to request the license information according to its License Pool ID. This request requires the machine to have access to the internet in order to request the information from the ICONICS cloud licensing server.

Once the license information has been successfully retrieved, the machine continues to operate using the licensing information retrieved from the web. The machine then periodically checks with the ICONICS Cloud Licensing server in order to validate the license. If it cannot validate the license for an extended period of time, the machine license will fail.

3.3 Issuing a New Cloud License

Follow these instructions to activate a license on a machine that currently has no license on it, or has a license on it that you want to overwrite.

If your machine already has a license on it and you are looking to add another license to it, see the next section entitled, "Adding to an Existing Cloud License".

1. Go to <http://www.iconics.com/support> and click the "License Your Product" link on the right.
2. In the new page that appears, select "Cloud" and log in with your username and password.

Note: If you do not have a username and password pair, you can register for one using the "Create New Account" link at the bottom of the window. If you have a username and password but have forgotten them, you can click on the "Forgot Password" link at the bottom of the window.

3. Once you have logged into the website, click on the "New License" link at the top.
4. Enter your Product Registration Number(s) and Customer Key(s) for the products.

Note: Your Product Registration Number(s) and Customer Key(s) are usually inside the DVD tin package that ICONICS sent when the product was purchased.

5. Click the "Next" button once you have entered all of your Product Registration Number(s).
6. Choose an existing end user or enter new end user information. Click "Next" when done.

Note: The existing end user dialog may take a few moments to appear. Please be patient.

- On the next screen, you see a list of the products that are available for you to license. Check all the products that you would like to license on this machine. Click “Next”.
- This page shows you a summary of what is in your license. Check to make sure everything is correct, then click on the “Generate Key” button. A page similar to the following image appears.

New License

The following License Pool has been assigned to your system for use in license activation.
Use the License Pool inside ICONICS Platform Services Configuration.
Please keep the License Pool for future reference purposes.

License Pool: A64F9EF1-D289-4386-A34D-637CD4857ADD

Registered Products

Product Key	Product Description	Order Date	Order #	P Number	G Number	Customer Key	32-bit VersionNum	64-bit VersionNum
ICC060-SIP30DAY	1 MONTH LICENSE FOR ICC060-SIP	25/Oct/2014	55351HQ	PN1264C8E08EAEFC41		CU500266	0.35	10.85

We recommend that you print this screen for your records. Use the print friendly button on the left.
An email has been sent to your email account with the above information.

Thank you for choosing ICONICS.

3.4 Adding an Existing Cloud License

- Go to <http://www.iconics.com/support> and click the “License Product” link on the right.
- In the new page that appears, select **Cloud** and log in with your user name and password.
- Once you have logged into the website, click on the “Add to License” link at the top.

Note: It is very important to pick “Add to License” and not “New License”. Picking “New License” overwrites any existing license already activated on this machine. Make sure to pick “Add to License” if you are adding products to a machine that already has a license on it.

4. Enter your existing License Pool ID and the Product Registration Number(s), and Customer Key(s) for the new products.

Note: Your Product Registration Number(s) and Customer Key(s) are usually inside the DVD tin package that ICONICS sent when the product was purchased.

5. Click the "Next" button once you have entered all of your Product Registration Number(s).
6. Choose an existing end user or enter new end user information. Click "Next" when done.

Note: The existing end user dialog may take a few moments to appear. Please be patient.

7. In the next screen, you see a list of the products that are available for you to license. Check all the products that you would like to license on this machine. Click "Next".
8. This page shows you a summary of what is in your license. Check to make sure everything is correct, then click on the "Generate Key" button.

3.5 Killing a Cloud License

1. Go to <http://www.iconics.com/support> and click the "License Product" link on the right. Select the "License" tab.
2. In the new page that comes up, select "Cloud" and log in with your username and password.
3. Once you have logged into the website, click on the "Kill License" link at the top. A page similar to the following figure appears.

Kill License

Please enter the License Pool to be removed and credited.

License Pool:

To remove a Cloud License for GENESIS64, do the following:

1. Click on Start, Programs, ICONICS, Tools, Platform Services Configuration
2. Click the License tab and copy the License Pool.
3. Enter your License Pool into the text box above; then click the Remove Pool button.

Remove Pool

4. Enter your License Pool ID into the prompt. Click "Remove Pool".
5. A message confirming that the license has been successfully removed appears. You will also receive an email with the killed license information. The products associated with this License Pool are now safely parked on the website and available to be re-licensed at any time.

4 IOTWORX QUICK START

4.1 Introduction

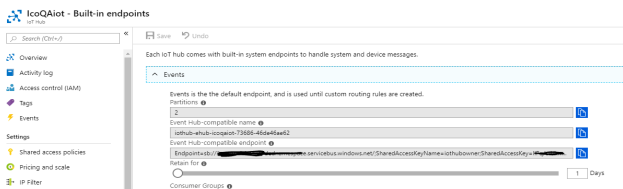
This chapter provides a brief overview of the following IoTWorX procedures:

- Initial Resource Setup
- Device Provisioning
- IoT Publish List Configuration
- IoT Collector Configuration

Note: For complete information about any IoTWorX product, please refer to the Help documentation, which you can find in any ICONICS product.

4.2 Creating and Gathering Azure Resources

1. In the Azure portal, select your Azure storage account and then **Access Keys**. Copy the **Connection string – primary key** and keep it handy – this will be used in a later step.
2. In the Azure portal, select your IoT Hub, select **Built-in endpoints**. Copy the **Event Hub-compatible endpoint** and keep it handy.



5. Name your device and then click **Save**.

Create a device

Find Certified for Azure IoT devices in the Device Catalog

* Device ID

Authentication type **Symmetric key**

* Primary key

* Secondary key

Auto-generate keys

Connect this device to an IoT hub **Enable** **Disable**

Save

6. The device will now be listed under **IoT Edge Devices**.
7. Click the device to be brought to the overview page.

Device details

Save Set modules Device twin Regenerate keys Refresh

Device ID

Primary key

Secondary key

Connection string (primary key)

Connection string (secondary key)

Connect this device to an IoT hub **Enable** **Disable**

Edge runtime response

Modules **IoT Edge hub connections** Deployments

Verify that your modules are included in the deployment, and whether your modules have been reported by the device. Click Set modules to change the modules that appear. Each device can host a maximum of 20 modules.

NAME	TYPE	SPECIFIED IN DEPLOYMENT	REPORTED BY DEVICE	RUNTIME STATUS	EXIT CODE
SedgeAgent	Module Identity	N/A	N/A	N/A	N/A
SedgeHub	Module Identity	N/A	N/A	N/A	N/A

8. Copy the **Connection String** and keep handy.

4.3 Setting Up the IoTWorX Edge Device

There are several methods for installing IoTWorX on your edge device. The files for the following steps can be found on the IoTWorX installation media. Make sure you have either mounted the IoTWorX installation ISO file or copied the relevant files to your device.

Install IoTWorX on Ubuntu 64-bit Edge Device

If you are using Ubuntu 16.04 or Ubuntu 18.04 (server or desktop version) use the following steps in Terminal to install IoTWorX on your device:

1. Cd into the **SharedFolder_Setup** folder.
2. Run this command:
sudo chmod +x ./IoTWorX_inst_amd64.sh
3. Run this command: **sudo ./IoTWorX_inst_amd64.sh**

Install IoTWorX on Other Edge Devices

Option 1: For Linux operating systems based on ARM32, such as Raspbian, use the following steps to prepare the device:

1. Cd into the **SharedFolder_Setup** folder.
2. Run this command:
sudo chmod +x ./IoTWorX_inst_arm32.sh
3. Run this command: **sudo ./IoTWorX_inst_arm32.sh**

Option 2: If you are unable to use the provided sh file, you may manually install the required components using the steps below:

1. On your IoT device, install **Azure IoT Edge runtime**. Directions for doing so can be found here:
 - a. For x64 devices - <https://docs.microsoft.com/en-us/azure/iot-edge/how-to-install-iot-edge-linux>

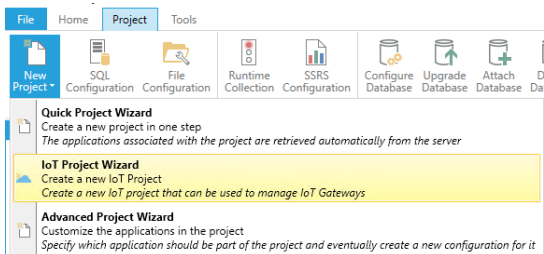
- b. For ARM32 devices -
<https://docs.microsoft.com/en-us/azure/iot-edge/how-to-install-iot-edge-linux-arm>

Note: Use the Edge Device connection string obtained in step 8 of the previous section when editing the `/etc/iotedge/config.yaml` file. For production systems, you should also install certificates for IoT Edge. More information can be found here: <https://docs.microsoft.com/en-us/azure/iot-edge/how-to-create-transparent-gateway>

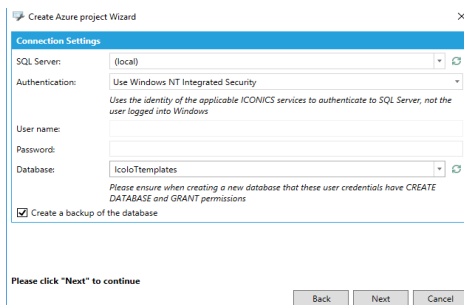
2. If you run **`sudo iotedge list`** on the device, you will see that the `edgeAgent` module is running.
3. Run **`sudo mkdir /usr/share/ICONICS`** to create a directory where some common program data for `ICONICS` modules will be stored.
4. Copy the contents of the provided zip file into **`/usr/share/ICONICS`**.
5. Run **`sudo chmod -R 755 /usr/share/ICONICS`** to enable the required permissions for all files.
6. For production environments, update the Docker log file settings to limit the size (see: <https://docs.microsoft.com/en-us/azure/iot-edge/production-checklist>).

4.4 Creating an IoT Project

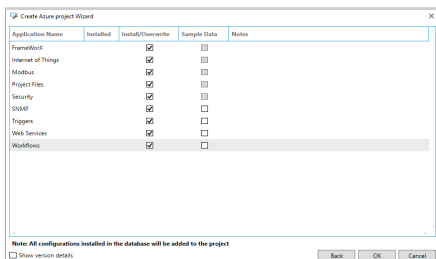
1. On the server where ICONICS Suite is installed, open **Workbench** and launch the **IoT Project Wizard**.



2. Give your project some name. In the **Azure Storage Connection** field, enter the connection string obtained in the first step of this document. Then in the **Azure Storage Folder** field enter the name of the folder within that storage where you would like to store IoTWorX configurations.
Click the "+" button next to the Subscriber Connection dropdown to create a new Subscriber Connection
3. Enter your subscription, and then enter the Event Hub connection string and IoT Hub owner connection string obtained in step 2 and step 3 of the first section of this document. Click **OK**.
4. Click **Next**.
5. Select your SQL Server, then enter the name of a NEW database where we will store the template configuration for our devices.



6. Click **Next**, then **Next** again.
7. Check the **Install/Overwrite** checkbox for each module that you will plan to use on your IoT device.



Note: The sample data for several modules could be optionally generated in the new database. Check the **Sample Data** checkbox for each module that you want to generate them.

8. Click **OK** to create the project.

4.5 Deploying ICONICS Modules to the Device

1. Expand the new IoT project in **Workbench** to see the device listed:



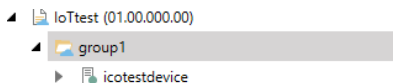
2. The device appears red here to indicate we can't deploy new ICONICS configurations to the device yet. We first need ICONICS modules running on the device before we can update its configuration. To do this, right click on device and select **Configure Modules**.
3. On the next screen, you will see the status of any Edge modules running on the device. Click the **Click to configure modules** link in the **Available Modules** header.

Available Modules Click to configure modules				
Name	Device	Type	Status	Version
SedgeAgent	icotestdevice	System	Running	1.0.6
SedgeHub	icotestdevice	System	Running	1.0.6

4. Under the **Deployment Options** section, select an option from the **Version** dropdown that is applicable to your deployment.
5. Check the **Deploy** checkbox for each ICONICS module you would like to add to your IoT device.

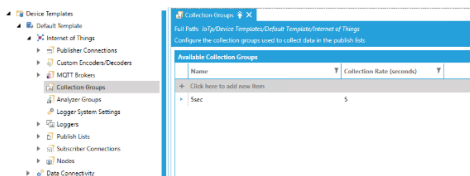
Note: The minimum required modules are **FrameWorX Server**, **IoT Publisher** and **Ico Edge Agent**. As we are using the IoT Visualizer for local visualizations later in this document we recommend deploying also IoT Visualizer module to IoT device already in this step.

6. Click **Deploy**. You should see a **Deploy successfully completed** message, indicating that a new deployment has been queued for the device. Click **Close**.
7. At this point, ICONICS modules will begin downloading to the IoT device. Depending on the speed of your internet, this may take some time (ICONICS modules total about 1.6 GB).
8. After modules have finished downloading and have started on the device, if you refresh your device group in **Workbench**, you will see that the device no longer red. It now has a green status icon indicating that it is online and running.

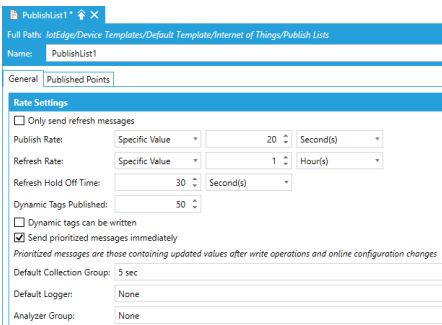


4.6 Deploying Configurations to the Device

- Now that ICONICS modules are running on the gateway, we can deploy configurations to it. First, we will define a collection group. Expand your **Default Template** and **Internet of Things** provider. Right click **Collection Groups** and select **Edit**.
- Add a new **Collection Group** to the list. This defines how often tags will be collected on the device. Apply your changes and close the form.

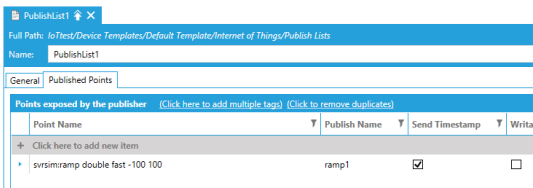


- Next, we will define a publish list. Right click **Publish Lists** and select **Add Publish List**. Give your list a name and change the **Default Collection Group** to the group created in the previous step. Change the **Publish Rate** and **Refresh Rate** to values appropriate for your deployment.



Note: There is an upper limit of 50 tags in dynamic subscriptions. Users are strongly encouraged to use static publish lists for this reason. Dynamic subscriptions are intended for small ad hoc requests for data, not large sets of tags.

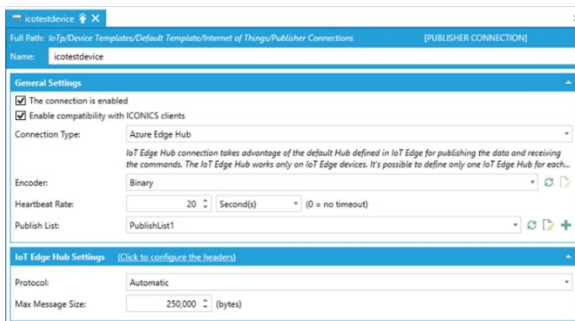
4. On the **Published Points** tab, add the points you would like to be published. As an example, you can enter **svrsim:ramp double fast -100 100** as a point name with a **Publish Name** of **ramp1**. Apply your changes and close the form.



The screenshot shows a web browser window titled "PublishList1". The address bar shows the full path: "IoTest/Device Templates/Default Template/Internet of Things/Publish Lists". The "Name" field contains "PublishList1". Below the tabs, the "Published Points" tab is active. It displays a table with the following data:

Point Name	Publish Name	Send Timestamp	Write
svrsim:ramp double fast -100 100	ramp1	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Open the **Publisher Connection** form for your device. Specify the publish list you created in the previous step as the **Publish List**. Apply your changes and close the form.



The screenshot shows a web browser window titled "icotestdevice" with the address bar showing the full path: "IoTest/Device Templates/Default Template/Internet of Things/Publisher Connections". The "Name" field contains "icotestdevice". The "General Settings" section is expanded and shows the following configuration:

- The connection is enabled
- Enable compatibility with ICONICS clients
- Connection Type: Azure Edge Hub
- Encoder: Binary
- Heartbeat Rate: 20 Second(s) (0 = no timeout)
- Publish List: PublishList1

The "IoT Edge Hub Settings" section is also expanded and shows the following configuration:

- Protocol: Automatic
- Max Message Size: 250,000 (bytes)

6. Now we will deploy this configuration to the device. Right click your device and select **Deploy Device(s) Configuration. Workbench** will create a new task to accomplish this. What is happening under the hood is:
 - a. The configuration that has been created in Workbench and stored in SQL Server is exported and a SQLite file is created.
 - b. The SQLite file (and other configuration pieces such as custom KPI dashboards) are packaged and sent to the Azure Storage account.
 - c. The Edge device's module twin is updated with the location of the new configuration.
 - d. The device receives a notification that its twin was updated and will download and apply the new configuration.
7. To confirm the new configuration has been applied, open **Data Explorer**. Browse to your device and look at the **Published Data via Static List**. You should see the point(s) you had defined earlier.



4.7 Set Diagnostics and Configuration Admin Password


It's highly recommended to change the default password for the Diagnostics and Configuration pages.

1. Go to the **IoTWorX Landing Page** by browsing to <http://DeviceIPaddress>.
2. Select **Diagnostics and Configuration**.
3. Log in as **admin** with the default password of **iconics**.
4. Follow the prompts to set a new admin password.

5 HELP AND TECHNICAL SUPPORT

5.1 Help Documentation

ICONICS software provides online help with descriptions and explanations of each application. Help is available throughout ICONICS Suite. You can access help in the following ways:

- Click the Help  icon in the Workbench. This opens the help file for that application. To search for a topic in the help file, click the **Index tab** or the **Search tab**. Type or select the term you want to find, and then **click** the topic you want to read.
- Press the **F1** key to display context-sensitive help.
- Click the **Help** button in any dialog box to display context-sensitive help for that dialog box.
- Move the mouse pointer over an icon and pause for a moment to display pop-up ToolTips for quick help.
- From the Windows **Start** menu, select **All Programs > ICONICS Help > Help**.
-

5.2 Technical Support

5.2.1 Telephone Support

ICONICS support centers are open Monday through Friday, year round, except for local holidays and ICONICS holidays. Support handles calls on a first-come, first-served basis during the business hours below.

Americas (United States): 1-508-543-8600	8:00 AM – 6:00 PM Eastern Standard Time
Europe (Czech Republic): + 420-377-183-420	9:00 AM – 5:00 PM European Central Time

Asia Pacific (Australia): + 61-2-9605 1333	9:00 AM – 5:00 PM Australian Eastern Time
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Please have the following available when you call:

- Your SupportWorX Plan Number.
- A PC available for tests and diagnostics.
- A clear understanding about the issue.
- The version of your OS and the ICONICS product(s).
- OPC server or relevant third-party software info.

Note: Go to

<https://getconnected.iconics.com/ICONICS/Support/GetSupport.aspx> to contact our Technical Support department.

Email Support

The ICONICS support center email addresses are:

- **North America:** Support@ICONICS.com
- **Europe:** EuropeSupport@ICONICS.com
- **Pacific Rim:** PacificRimSupport@ICONICS.com

Please include your SupportWorX Plan Number when sending your message. Email requests will be answered on a first-come, first-served basis typically the same day.