

Manitou Core - Advanced Report Writer Install Checklist

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NOTE: Tern.dll needs to be in the Manitou Directory for the reports to run.

Pre-Install Checklist

- Is SQL Server Reporting Services installed? If not you will need to run the SQL installer and add that specific feature
- Are the most recent update files downloaded?
- Does a MSSQL user exist? If not, add the user.
 - Run lusrmgr.msc from a run dialog
 - Open Users
 - Right Click within the window and select new user
 - Add the user with a complex password, select create, and record in the Bold Support Portal.
 - Right click on the new user that was added, and select properties.
 - Under the Member Of Tab, add the Administrators Group.
- Is the Report Server currently running
- Open Reporting Services Configuration Manager from the Start menu
- Login to the reporting services database
- The Current Report Server should show a status of Started.
- Download the rdlprep.zip file to the desktop and extract.
- This can be found on Installation Media under Advanced Report Writer
(\\fileserver02\Supporting_Media\Advanced Report Writer)

This can also be found on FileServer02 in custom_reports in Release ? Manitou
(\\fileserver02\Release\Manitou\Custom_Reports\Newest RDLPrep)

SQL Reporting Setup

- Specify MSSQL as the Execution account for SSRS (SQL Server Reporting Services)
 - Open the Reporting Services configuration (found in the start menu under SQL configuration tools)
 - Select the Execution Account tab on the left
 - Check the 'Specify an execution account' checkbox
 - Enter the username with domain and password for MSSQL (or alternate SQL administrative windows user)
 - Select Apply
 - There should now be a message under results that states the unattended execution account has been set.
- Verify you can access the Web Service URL
 - From the Reporting Services Configuration Manager click on the Web Service URL Tab on the left
 - Under the Report Server Web Service URLs section, select the ReportServer URL
 - There should now be a page that states Microsoft SQL Server Reporting Services and its corresponding version
 - If the page does not display, verify the Web Service Site identification settings and try again.
- Configure the Report Site Security Settings to allow for connection.
 - from the Reporting Services Configuration Manager click on the Web Portal URL Tab on the left
 - In the Report Manager Site Identification, select the URL that ends with /Reports
 - You should have a webpage open that shows the Home directory of SQL Server Reporting Services
 - In the top right corner of the web page, select Site Settings
 - Select the Security Tab located on the left
 - Click Edit next to the user that already exists (should be BUILTIN\Administrators)
 - Verify all Roles are checked and select Apply. (administrator and user)
 - Now select "Add group or user"

- Specify the MSSQL user for the user name and check all roles (administrator and user) and select OK.
- Click on SQL Server Reporting Services at the top left corner to return to the Home directory.
- Select "Manage folder" located next to New and Upload.
- Click Edit next to the user that already exists (should be BUILTIN\Administrators)
- Verify all Roles are checked and select Apply. (Browser, Content Manager, My Reports, Publisher, and Report Builder)
- Now select "Add group or user"
- Specify the MSSQL user for the user name and check all roles (Browser, Content Manager, My Reports, Publisher, and Report Builder)
- Select OK
- Verify You can access <http://<Local Server>/reportserver/reportexecution2005.asmx> from a browser, it will be an XML document
 - If not restart the SQL Reporting Services and try again.

Add Advanced Report Writer into Manitou

- The following dlls MUST be in the manitou directory otherwise the report server will crash. Grab the latest from the
 - Distributer folder.
 - SSRSPProxy.dll
 - Tern.dll
 - drn.dll
- Open the configuration manager from the Supervisor Workstation (Maintenance ? Setup ? Configuration)
- Go into Edit Mode
- Select the Report Server from the list of applications already on the Manitou system
- Add the following parameters to the report server

- Param 1 | -iC:\temp\ReportSwap (this may already exist)
- Param 2 | -uhttp://<Local Server>/reportserver/reportexecution2005.asmx (replace LocalServer with the name of the reporting server)
- Param 3 | -v<User Login> (This should be MSSQL unless otherwise specified)
- Param 4 | -w<User Password> (This should be the MSSQL password unless otherwise specified)
- Param 5 | -x<Domain for User> (This IS REQUIRED, even if it is localhost)
- Save the changes
- Refresh the MSM by clicking the refresh button or by closing and reopening the program.
- Stop the Report Server
- Start the Report Server
- Verify the system has been licensed for External Reporting
- Advanced Reporting Services has now been installed, however, it is highly recommended to test the install as there is a lot that can go wrong.

Testing the Advanced Report Writer in SQL 2012 and 2014

- Open the SQL Server Reporting Services Home web page
 - from the Reporting Services Configuration Manager click on the Report Manager URL Tab on the left
 - In the Report Manager Site Identification, select the URL that ends with /Reports
 - You should have a webpage open that shows the Home directory of SQL Server Reporting Services
- Select the Report Builder located in New>Paginated Report. (If not installed, you will receive a pop-up directing you to the current release to download and install)
- Select Run for any prompt that comes up
- You should now see a getting started page with a wizard to create reports
- Select table or Matrix wizard
- Verify the Create a dataset radio button is selected and click Next >

- Select New... under the data source connections
- Fill in the Data Source Properties
 - Set the Name to Manitou
 - Verify the connection type is set to Microsoft SQL Server
 - Select Build... next to the connection string.
 - Enter in the Reporting Server name in Server name
 - Select the Use SQL Server Authentication radio button
 - Specify the sa user and corresponding password.
 - Select the MANITOU database
 - select OK
 - select Test Connection
 - Specify the sa user and corresponding password again.
 - The test should complete successfully, if not check your parameters again.
 - Select OK
- Verify Manitou is selected as the Data Source Connection and select Next.
- Specify the sa user and corresponding password again and select OK.
- For this specific report we will be creating a Manitou User query
- Expand Tables under the Database View.
- Scroll down and check the USR table
- under the selected fields delete everything except CREDATE, USRID, and NAME.
- Select Next >
- Drag all three available fields to the Values Field

- Select Next >
- A preview of the table will display, if it displays three columns one for each of the available values, select Next, if not revisit the previous steps.
- Leave the style as Ocean and select Finish >>
- You will now have an editor to change the display of the table
- Change the column headers to Created Date, User ID, and Name
- Change the Click to add title to Manitou User Report
- Once the Report is changed to how you would like it to look, select run at the top left to test the report.
- After a few moments, the report will generate with actual data, verify you don't need to make any additional changes
- Select the Save button at the top left (picture of a floppy)
- Name the RDL (no spaces) and save it in a location you will remember
- You can now close the Report Builder and web page if not already closed.
- Open the Bold External Report Prep Utility (GUI rdl Report Prep, found in the extracted folder on the desktop)
- Set the description to Test User Report
- Select the locale for the report
- Select the source rdl created with the Report Builder
- Enter the destination filename (add prepped to the end of the file name to avoid overwriting the current rdl)
- Click Prep File to output the prepped .rdl
- Close the Report Prep utility
- Open Supervisor workstation if not already open
- Open Report Templates (Reports ? Report Templates)
Enter Edit Mode
- Scroll to the bottom of the reports available and select Custom under External (Not the custom heading)

- Select Add (located above the available reports listing)
- Specify a Report Name (Test User Report)
- Select the prepped rdl we created with the Report Prep Utility.
- Select OK and Save
- Test Running the Report we just created
 - go to System Reports (Reports ? System Reports)
 - Expand Custom
 - Select Test User Report
 - Select Next
 - Select Finish so the report generates locally
 - Select Yes
 - The test should complete successfully, with the report automatically displaying, if not check your parameters and dlls again.
 - Select OK