

# EVOKEIT

# **Reports Configuration Guide**

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## **Overview**

The EvokelT reporting system has migrated from WebFOCUS to SQL Server Reporting Services (SSRS). With SSRS, the SQL server must have reporting services enabled for the EvokelT reporting system to function. This document contains information about enabling the reporting services in your SQL server and configuring SSRS.

## **Getting Started**

Choose one of the following options to get started:

- If reporting services are enabled and configured on your SQL server, see *Configure SQL Server Reporting Services (SSRS) on page 1-7.*
- If reporting services are not enabled or configured on your SQL server, see Add and Configure Reporting Services on page 1-4.
- If you are not sure whether reporting services are enabled and configured on your SQL server, see *Verify if reporting services are enabled on the next page*.

## Verify if reporting services are enabled

This section contains information about verifying if reporting services are enabled and configured in your SQL server.

The verification is a 2-step process. You will need to:

- 1. Verify if reporting services are enabled.
- 2. Verify if reporting services are configured.

#### To verify if reporting services are enabled:

- 1. Click Start to open Windows Search.
- 2. Type **Services.msc** and open the application.
- 3. Check if SQL Server Reporting Services is present under the Name column.
  - If **SQL Server Reporting Services** is not present, see *Add and Configure Reporting Services on page 1-4* to add reporting services to your SQL server.
  - If SQL Server Reporting Services is present, see the following information to verify they are configured.

#### To verify if reporting services are configured:

- 1. Click Start to open Windows Search.
- 2. Type **Reporting Services Configuration Manager** and open the application.
- 3. Verify if the instance in Report Service Instance matches the SQL instance in services.msc as shown in the following image.

Services				
File Action View Help				
Services (Loca Services (Local)				
WWAN AutoConfig	Name	Description Status	Startup Type Log On	As
Start the service	SQL Server Distributed Replay Client     SQL Server Distributed Replay Controller     SQL Server Integration Services 11.0	One or mor Provides tra Provides m Started	Manual NT Sen Manual NT Sen Automatic NT Sen	rice vice vice
Description:	SQL Server Reporting Service: (MSSQLSERVER)     SQL Server VSS Writer	Manages, e Started Provides th Started	Automatic NT Sen Automatic Local S	vice
broadband (GSM & CDMA) data card/embedded module	SSD     Reporting Services Configuration Connection			
adapters and connections by auto-configuring the networks. It is strongly recommended that this	Sup Sup Sup			
service be kept running for best user experience of mobile broadband devices.	Sup Please specify a server name, click the Find butter configure.     Sup configure.	n, and select a report server	instance to	
	Syst Server Name: W	S003LT1850PRD		Eind
	Report Server Instance:	SSQLSERVER		•
	© TCP.			=
	G The O		Connect	Cancel
	STPM Base Services	Enables acc	Manual Local S	ervi
	G UPnP Device Host	Allows UPn	Manual Local S	ervi
Extended / Standard /	23 Hear Drofila Convica	This service Ctarted	Automatic Local C	1.008

- 4. Do one of the following depending on the match
  - If the instances names do not match, see *Add and Configure Reporting Services on the next* page to add and configure reporting services on you SQL server.
  - If the instance names match, see *Configure SQL Server Reporting Services (SSRS)* on page 1-7 to configure SSRS.

# **Add and Configure Reporting Services**

This section contains information about adding and configuring reporting services. Click the appropriate server version for more information.

- Microsoft SQL Server 2005 SP3
- <u>Microsoft SQL Server 2008 R2</u>
- <u>Microsoft SQL Server 2008 R2 Express</u>
- <u>Microsoft SQL Server 2012</u>
- <u>Microsoft SQL Server 2014</u>
- <u>Microsoft SQL Server 2014 Express</u>
- Microsoft SQL Server 2016

### Microsoft SQL Server 2005 SP3

EvokelT no longer supports Microsoft SQL Server 2005 SP3. You will need to upgrade Microsoft SQL Server 2005 SP3 to an SQL server of your choice.

For upgrade-related information and details about end of support of Microsoft SQL Server 2005, see the following information on the Microsoft website: <u>Extended support for SQL Server 2005 ended on</u> April 12, 2016.

After upgrading, to configure SQL Server Reporting Services, see *Configure SQL Server Reporting Services (SSRS) on page 1-7.* 

## Microsoft SQL 2008 R2 or Microsoft SQL 2012 or Microsoft SQL 2014 or Microsoft SQL 2016

The SQL server must have reporting services enabled for the reporting services of EvokeIT to function.

If reporting services are enabled on your SQL server, see Configure SQL Server Reporting Services (SSRS) on page 1-7.

If reporting services are not enabled, click the appropriate link to view related information on the Microsoft website.

- Microsoft SQL 2008 R2
- Microsoft SQL 2012
- Microsoft SQL 2014
- Microsoft SQL 2016

After enabling reporting services on your SQL server, to configure SQL Server Reporting Services see, Configure SQL Server Reporting Services (SSRS) on page 1-7.

## Microsoft SQL Server 2008 R2 Express

EvokeIT no longer supports Microsoft SQL Server 2008 R2 Express. The EvokeIT installation package contains a setup file of Microsoft SQL Server 2014 Express. The following information will allow you to install Microsoft SQL Server 2014 Express and configure reporting services.

#### To upgrade to Microsoft SQL Server 2014 Express and configure SQL Server Reporting Services:

1. Navigate to the following location to find the Microsoft SQL Server 2014 Express setup file.

EvokeITServer > Resources > SqlExpress2014 > Setup.exe

2. Use the following information on the Microsoft website to upgrade to Microsoft SQL Server 2014 Express: Upgrade to SQL Server 2014 Using the Installation Wizard (Setup)

**Note:** During the upgrade process ensure to select the following features on the Select Features pane.

- Database Service Engine
- Reporting Services Native
- Management Tools
- Configure SQL Server Reporting Services using the information in the following section: Configure SQL Server Reporting Services (SSRS) on page 1-7.

#### Microsoft SQL 2014 Express

The SQL server must have reporting services enabled for the reporting services of EvokeIT to function. This section contains information about enabling reporting services on Microsoft SQL 2014 Express and configuring reporting services.

To enable reporting services on Microsoft SQL 2014 Express and configure reporting services:

- 1. In the EvokelT installer package, navigate to EvokeITServer > Resources > SqlExpress2014
- 2. Click the Setup.exe file.
- 3. Use the information in the following on the Microsoft website to install Microsoft SQL Server 2014 Express: Install Reporting Services Native Mode Report Server
- 4. Configure SQL Server Reporting Services using the information in the following section: *Configure SQL Server Reporting Services (SSRS) on the next page.*

# **Configure SQL Server Reporting Services (SSRS)**

Perform the steps outlined in this sub-section only if you have not configured your reporting services to run under a domain user account. Configuring the reporting services to run under a domain user account helps in preventing widespread damage if a shared account is compromised by a malicious user. It also makes it easier to audit the logon activity for the account.

Use the following links for information about specific steps of the configuration process:

- Configure the report server
- <u>Configure the report server database</u>
- Enter the Service Account details
- Configure Web Service URL
- Optional: Configure Report Manager URL

**Important:** You must have Administrator rights to configure SSRS.

1. Click Start > All Programs > <Your SQL Server>> Configuration Tools > Reporting Service Configuration Manager.

The **Reporting Services Configuration Connection** window is displayed as seen in the following image.

Reporting Services Configuration	n Connection	×
SQL Server 200 Reporting Services	08 R2	
Please specify a server name, click instance to configure.	the Find button, and select a report server	
Server Name:	SW003PH29H02	Find
Report Server Instance:	MSSQLSERVER	•
0	Connect	Cancel

- 2. Configure the report server:
  - a. In the **Server Name** field, enter your report server name, if the server name displayed is not your report server name.
  - b. Click **Find** and select the report server instance that you want to configure.
  - c. Click Connect.

The **Reporting Services Configuration Manager** window is displayed as seen in the following image.

Reporting Services Configuration	Manager: \/M55QL5ERVER		
Reporting Services Con	2 figuration Manager		
Connect	Report Server Status		
Service Account	Use the Reporting Services Con Manager. If you installed Repor database, and the Report Mana	iguration Manager tool to define or modify settings for the Report Serv ting Services in files-only mode, you must configure the Web service U ger URL.	ver and Report RL, the
A Web Service URL	Current Report Server		
🔰 Database	SQL Server Instance: Instance ID:	MSSQLSERVER MSRS10_50.MSSQLSERVER	
Report Manager URL	Edition: Product Version:	ENTERPRISE EDITION 10.50.1600.1	
la E-mail Settings	Report Server Database Name: Report Server Mode:	ReportServer Native	
Kecution Account	Report Service Status:	Started	
Recryption Keys		Start Stop	
ु <sup>म्</sup> Scale-out Deployment			
	Results		
			Copy
0		Apply	Exit

- 3. Configure the report server database:
  - a. In the **Connect** pane, click **Database**.

The **Reporting Server Database** settings are displayed as seen in the following image.



b. In the Current Report Server Database area, click Change Database.

The **Change Database** window is displayed as seen in the following image.

Report Server Database	Configuration Wizard X
Change Database Choose whether to create	or configure a report server database.
Action Database Server Database Credentials Summary Progress and Finish	Select one of the following options to create an empty report server database or select an existing report server database that has content you want to use. Select a task from the following list: C Create a new report server database. C Choose an existing report server database.
Ø	Previous Next Cancel

- c. Do one of the following:
  - Select Create a new report server database to create a new report server database and click Next.
  - Select **Choose an existing report server database** to connect to an existing report server database and click **Next**.

The fields required for the SQL Server Database configuration are displayed as seen in the following image.

Report Server Database (	Configuration Wizard	K
Change Database Choose whether to create	or configure a report server database.	
Action Database Server	Choose a local or remote instance of credentials that have permission to cor	a SQL Server Database Engine and specify nect to that server.
Database Credentials Summary Progress and Finish	Connect to the Database Server: Server Name: Authentication Type: Username: Password:	Current User - Integrated Security
0		Previous Next Cancel

- d. Specify the SQL Server Database engine instance and the credentials to connect to it:
  - i. In the Server Name field, type your SQL Server name.
  - ii. In the Authentication Type field, choose the required option.
  - iii. In the Username and Password fields, provide credentials if necessary.
  - iv. Click Test Connection.
- e. If the connection is successful, click Next.

The **Database** pane is displayed.

- f. Do one of the following:
  - If you are creating a new database, provide a database name and select the language.
  - If you are connecting to an existing database, select a report server under **Report Server Database**.
- g. Click Next.

The **Credentials** pane is displayed.

Report Server Database (	Configuration Wizard		×
Change Database			
Choose whether to create o	or configure a report server database.		
Action	Specify the credentials of an existin	g account that the report server will use to c	connect to
Database Server	the report server database. Permis automatically granted to the accourt	sion to access the report server database w it you specify.	vill be
Database			
Credentials			
Summary	Credentials:		
Progress and Finish			
	Authentication Type:	Service Credentials	
	User name:	WIRE R. MURPHEER STRATE	
	Password:		
0		Previous Next	Cancel

- h. Select the Authentication Type and provide credentials if necessary.
- i. Click Next.

The summary information used to connect to the report server database is displayed.

Report Server Database C	onfiguration Wizard		×
Change Database Choose whether to create o	r configure a report server database.		
Action Database Server Database Credentials	The following information will be u Verify this information is correct be SQL Server Instance:	sed to connect to an existing report server databas fore you continue.	e.
Summary	Report Server Database: Report Server Mode:	ReportServer Native	
Progress and Finish	Authentication Type: Username: Password:	Service Account	
Ø		Previous	Cancel

j. Verify the information and click Next.

The configuration tasks are performed and their status is displayed.

Report Server Database Conf	iguration Wizard	×
Change Database Choose whether to create or co	nfigure a report server database.	
Action Database Server Database	Please wait while the Report Server Database Configuration wizard configures the database. This might take several minutes to complete.	
Credentials Summary Progress and Finish		1
	Verifying database sku     Success       Generating rights scripts     Success       Applying connection rights     Success       Setting DSN     Success	
0	Previous Finish Cancel	

- k. Click **Finish** when all the configuration tasks are successfully completed.
- 4. Enter the Service Account details:
  - a. In the Connect pane, click Service Account.

The service account configuration fields are displayed in the right pane as seen in the following image.

Reporting Services Configuration Mana	ager: DCA1APP06VRDM\SQLEXPRESS	
SQL Server 2008 R2 Reporting Services Configu	uration Manager	
Connect     DGA1APPOSVRDM[SQLEXPRESS     Generation     Web Service URL     Database     Report Manager URL     E-mail Settings     E-mail Settings     Encryption Keys     #" Scale-out Deployment	Service Account  Service Account  Report Server Service Account  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Choose an option to set the service account and then dick Apply.  Results	Ссру
0	Арріу	Exit

- b. In the **Report Server Service Account** area, select **Use built-in account** and choose **Report Server Account**.
- c. Click Apply.

The **Backup Encryption Key** dialog box prompts you to back up the symmetric key.

Backup Encryption Key	
Specify the name and must specify a passw	l location of a file that will contain the copy of the key. You vord that is used to lock and unlock the file.
File Location:	
Password:	
Confirm Password:	
0	OK Cancel

d. In the **File Location** field, type a file name and location for the symmetric key backup, type a password to lock and unlock the file, and then click **OK**.

If the report server uses the service account to connect to the report server database, the connection information has to be updated to use the new account or password. Updating the connection information requires that you connect to the database.

e. If the SQL Server Database Connection dialog box appears, from the Credentials Type list, select Current User - Integrated Security and then click OK.

SQL Server Connection Dialog	x
Specify administrator login credentials for applyi account.	ing grant rights script for the new windows service
Specify a SQL Server instance:	
Server Name:	WS003LT 1830PRD
Specify an account with administrator privileges	:
Credentials Type:	Current User - Integrated Security
Username:	
Password:	
· · · · · · · · · · · · · · · · · · ·	
0	OK Cancel

- f. Review the status messages in the **Results** pane to verify that all tasks have completed successfully.
- 7. Configure Web Service URL:

a. In the Connect pane, click Web Service URL.

The Web Service URL pane is displayed as seen in the following image.

Reporting Services Configuration Mar	ager: SV003M2M02\MSSQLSERVER		_ 🗆 ×
SQL Server 2008 R2 Reporting Services Config	uration Manager		
Connect SV003M2M02(MSSQLSERVER Service Account Web Service URL Database Report Manager URL E-mail Settings	Web Service URL Configure a LRL used Instance, or to specify Report Server Web Service Virtue Virtuel Directory: Report Server Web Service Site I IP Address: TCP Port: SSL Certificate:	to access the Report Server. Click Advanced to define multiple URLs for a single Report additional parameters on the URL. Il Directory	Server
Execution Account	SSL Port:	Advanced.	
Encryption Keys <sup>2</sup> Scale-out Deployment	Report Server Web Service URLs	http://t8081/ReportServer	
	Results		Сору
0		Apply	Exit

**Important:** Make a note of this URL. You will need it to deploy reports after EvokeIT installation.

- 8. Optional: Configure Report Manager URL:
  - a. In the Connect pane, click Report Manager URL.

The **Report Manager URL** pane is displayed on the right as seen in the following image.

Reporting Services Configuration Man	ager: \$	
Reporting Services Config	uration Manager	
Connect  Co	Report Manager URL         Image: Configure a URL to access Report Manager. Click Advanced to define multiple URLs, or to parameters on the URL.         Report Manager Site Identification         Virtual Directory:       Reports         URLs:       http://source.se082/Reports	o specify additional Advanced
	Results	Сору
0		Apply Exit

b. In the Virtual Directory field, type the report virtual directory.



- c. See the following information on the Microsoft Website setup the report manager URL under **Advanced**: Configure a URL (SSRS Configuration Manager)
- 9. Click Exit to close the Reporting Services Configuration Manager window.

#### **Configure SSL Connections on a Native Mode Report Server**

Use the following information on the Microsoft website to configure SSL connections on a native mode report server: Configure SSL Connections on a Native Mode Report Server

**Note:** Use the **Other Versions** drop down menu to choose the appropriate server version.

# Memory management for SSRS in SQL Server Management Studio

This section contains information about setting the maximum server memory in SQL Server Management Studio. Doing this avoids high CPU utilization which in turn improves system performance.

It is recommended to set the maximum server memory to half of your RAM. For example, if your RAM is 16 GB (16000 MB), then it is recommended to set the maximum server memory as 8 GB (8000 MB).

#### To set the maximum server memory:

- 1. Open SQL Server Management Studio
- 2. In the **Object Explorer** pane, right click the server name and select **Properties** to open **Server Properties** window.
- 3. In the **Select a Page** pane, click **Memory** to open the Memory pane.
- 4. Enter the required value under Maximum server memory (in MB).