APTEAN

SURVEYOR

Reports Configuration Guide

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Contents

Overview

The Surveyor reporting system has migrated from WebFOCUS to SQL Server Reporting Services (SSRS). With SSRS, the SQL server must have reporting services enabled for the Surveyor 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:

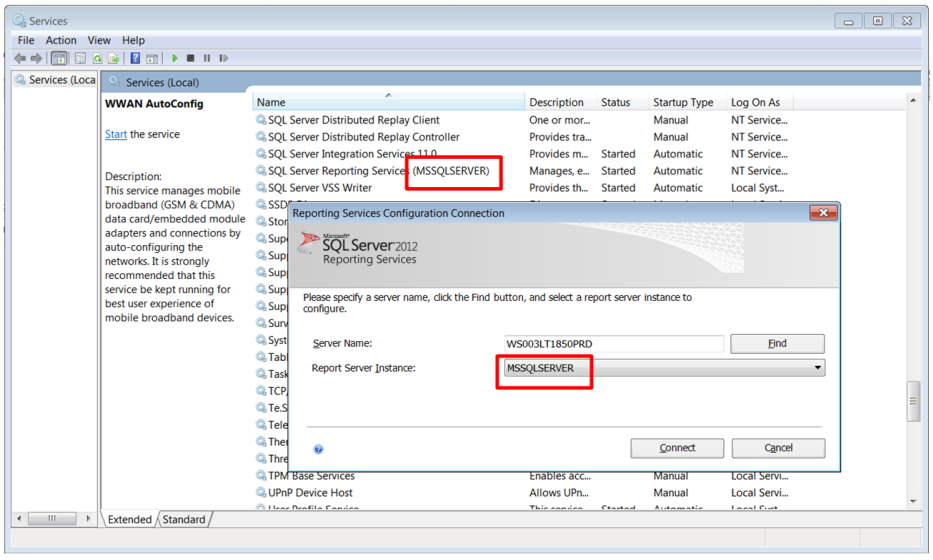
1. Verify if reporting services are enabled.
2. Verify if reporting services are configured.

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.



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

Microsoft SQL Server 2005 SP3

Surveyor 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: Extended support for SQL Server 2005 ended on 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 Surveyor 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

Surveyor no longer supports Microsoft SQL Server 2008 R2 Express. The Surveyor 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.

   `SurveyorServer` > `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

3. 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 Surveyor to function. This section contains information about enabling reporing servies 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 Surveyor installer package, navigate to `SurveyorServer` > `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.

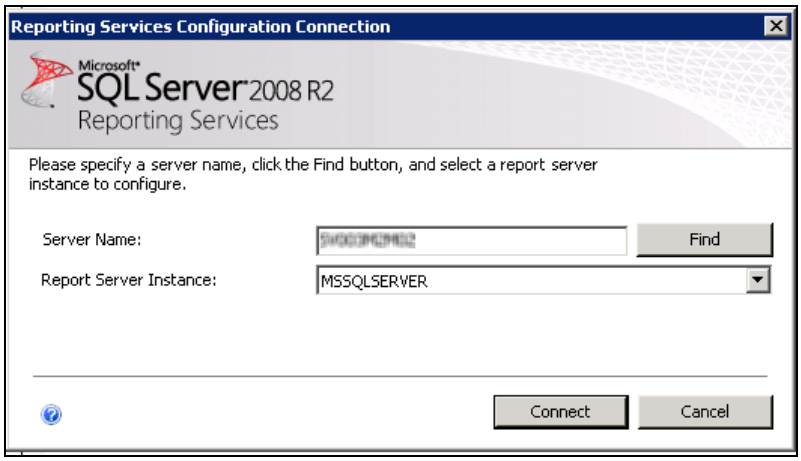
Use the following links for information about specific steps of the configuration process:

- Configure the report server
- Configure the report server database
- 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.



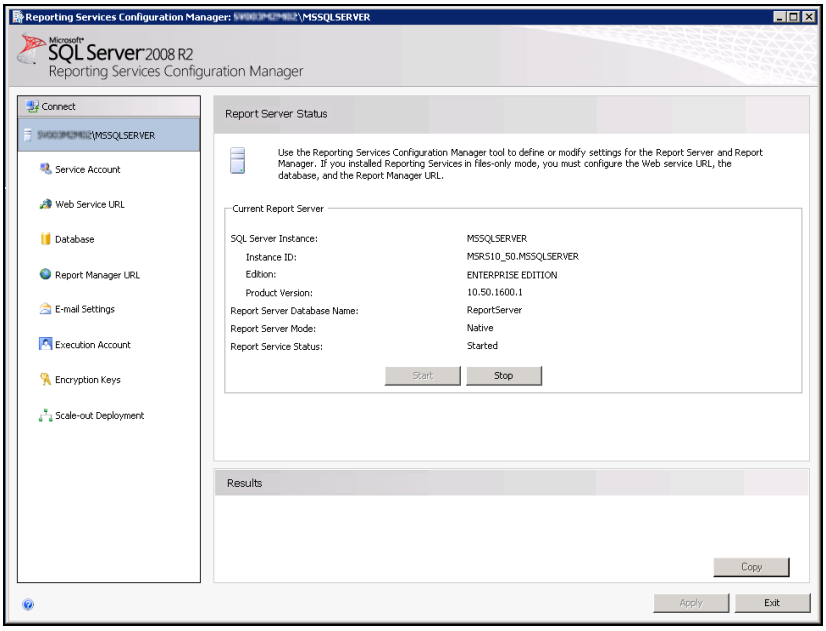
2. Configure the report server:

   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**.

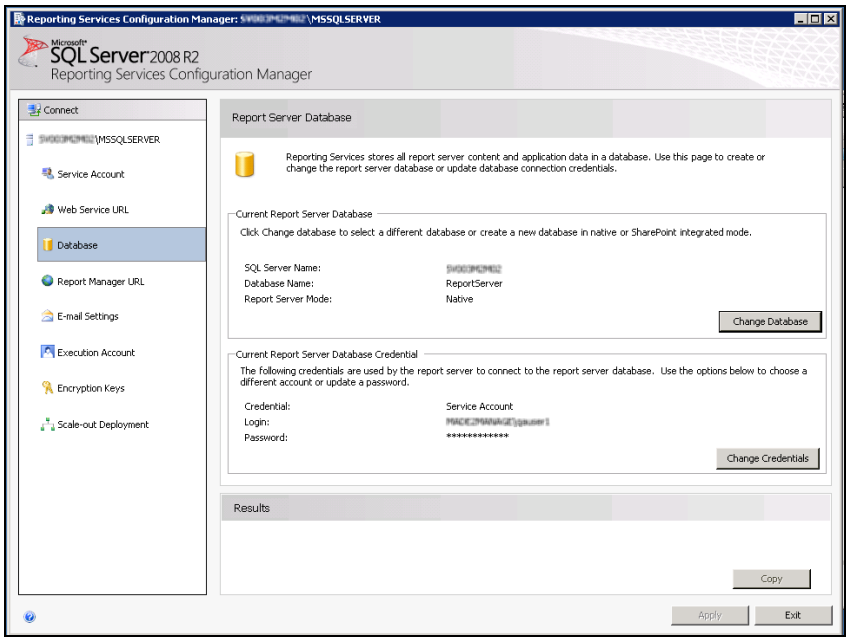
The **Reporting Services Configuration Manager** window is displayed as seen in the following image.



3. Configure the report server database:

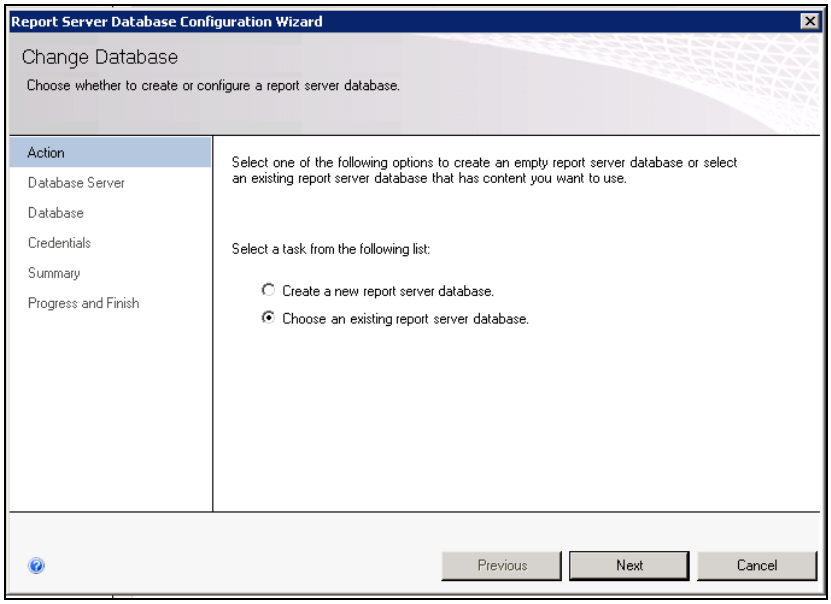
   a. In the **Connect** pane, click **Database**.

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



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

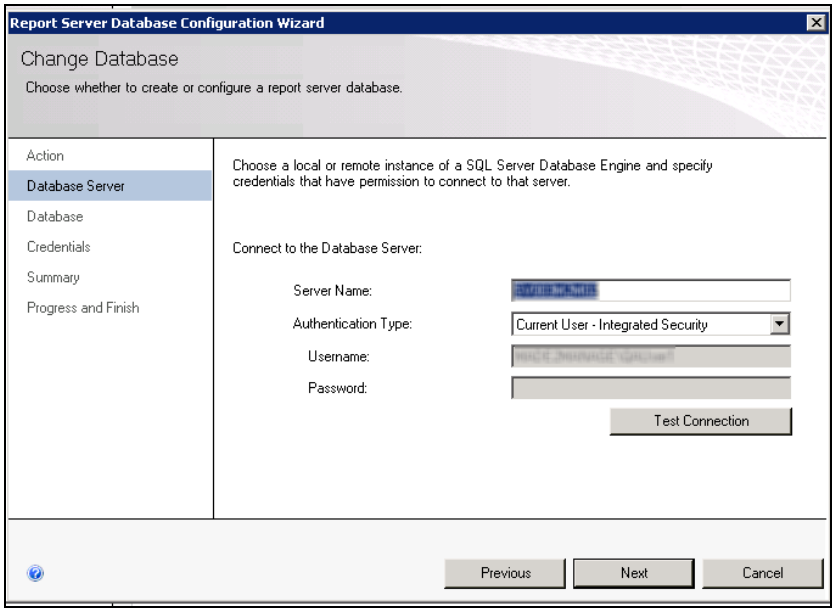
The **Change Database** window is displayed as seen in the following image.



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.



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**.

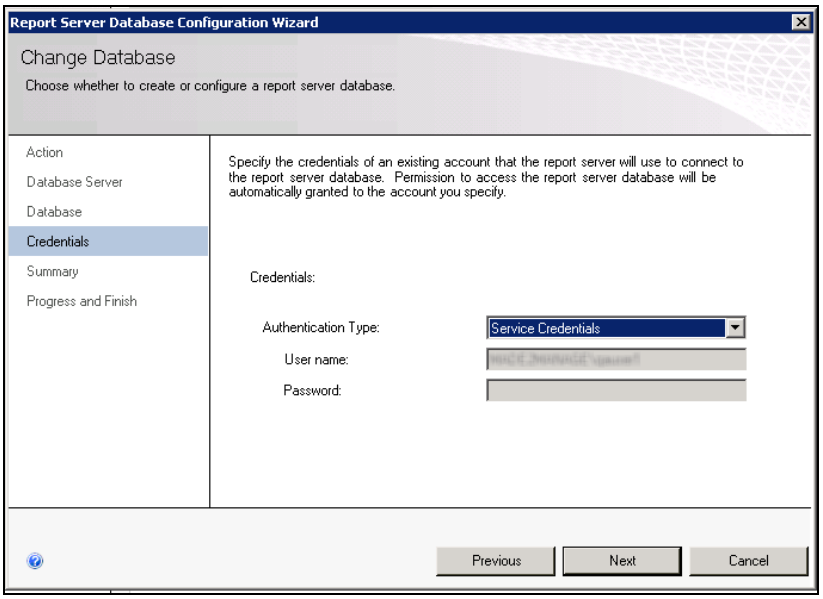
   The **Database** pane is displayed.

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**.

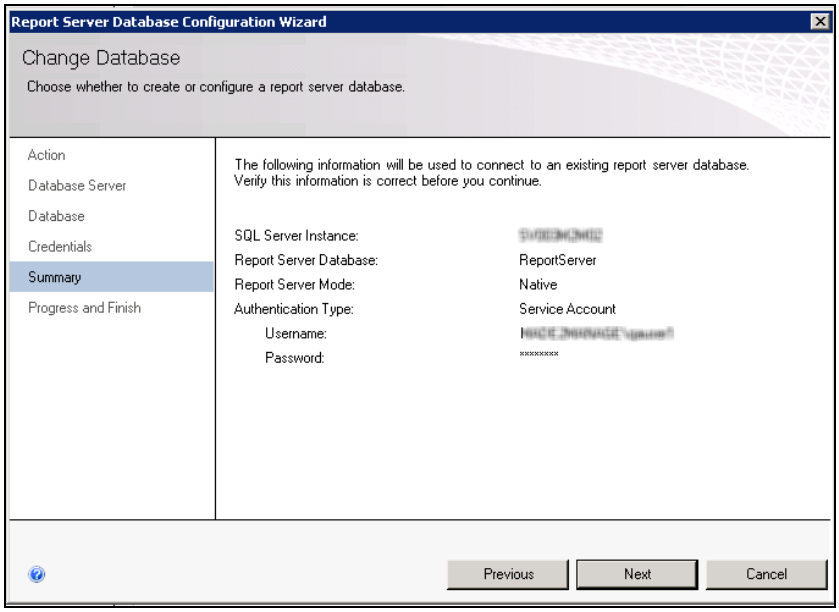
   The **Credentials** pane is displayed.



h. Select the **Authentication Type** and provide credentials if necessary.

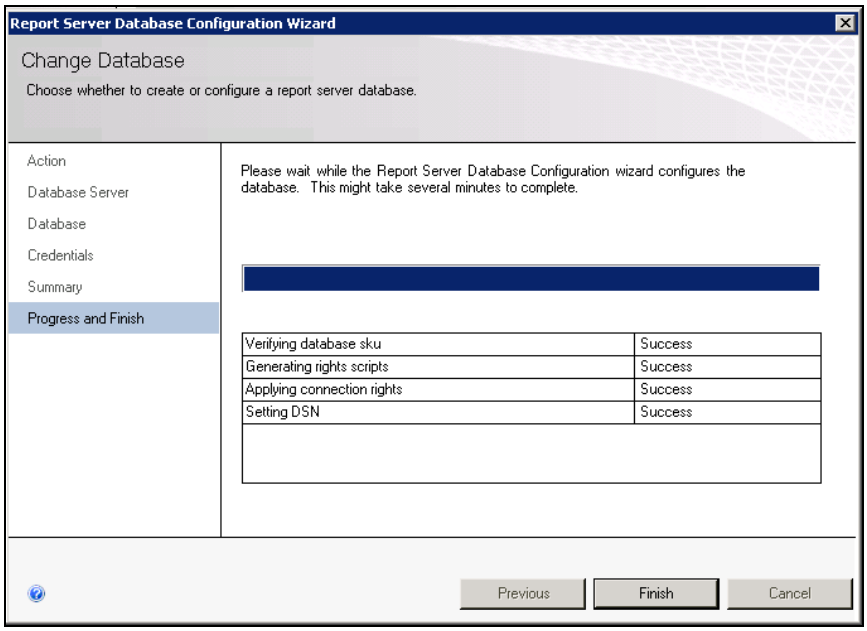
i. Click **Next**.

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



j. Verify the information and click **Next**.

The configuration tasks are performed and their status is displayed.

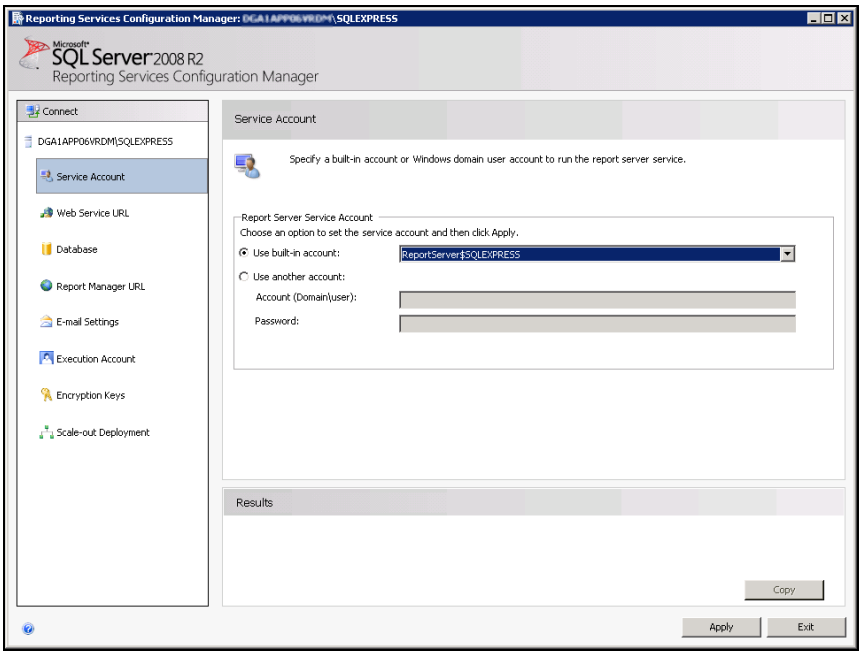


k. Click **Finish** when all the configuration tasks are successfully completed.

4. Enter the Service Account details:

a. In the **Connect** pane, click **Service Account**.

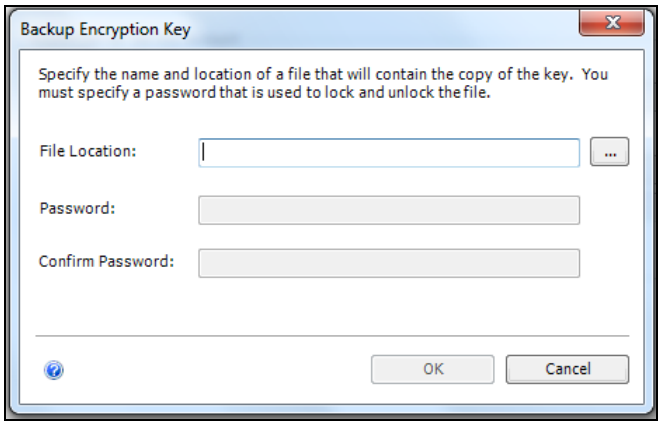
The service account configuration fields are displayed in the right pane as seen in the following image.



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

c. Click **Apply**.

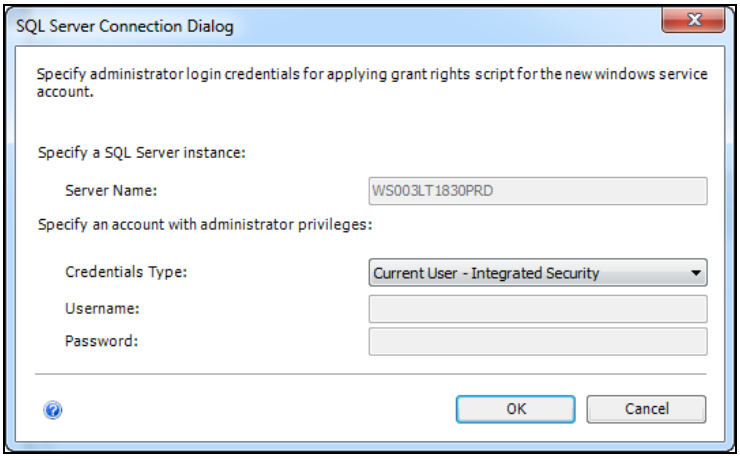
The **Backup Encryption Key** dialog box prompts you to back up the symmetric key.



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**.

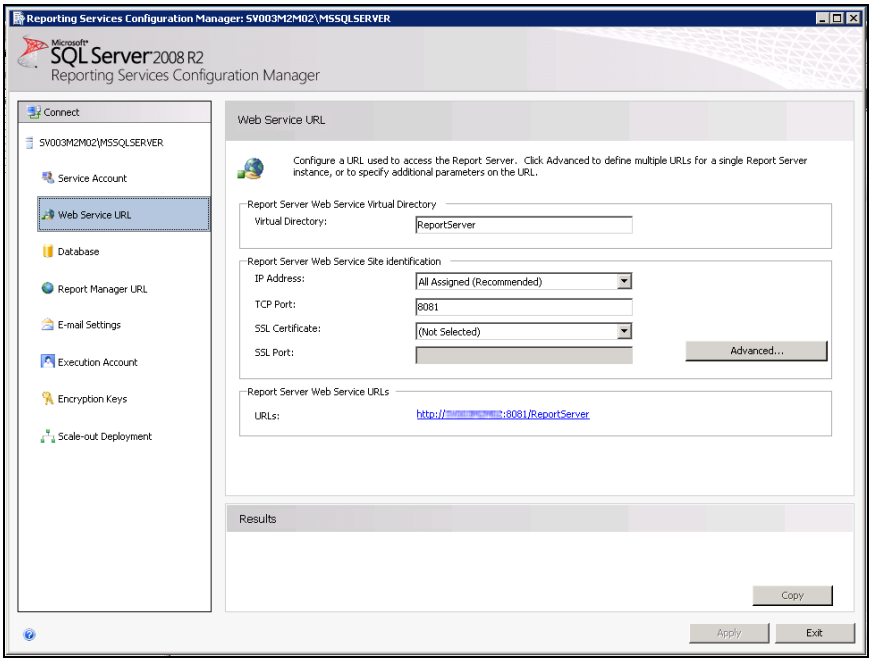


f. Review the status messages in the **Results** pane to verify that all tasks have completed successfully.

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.

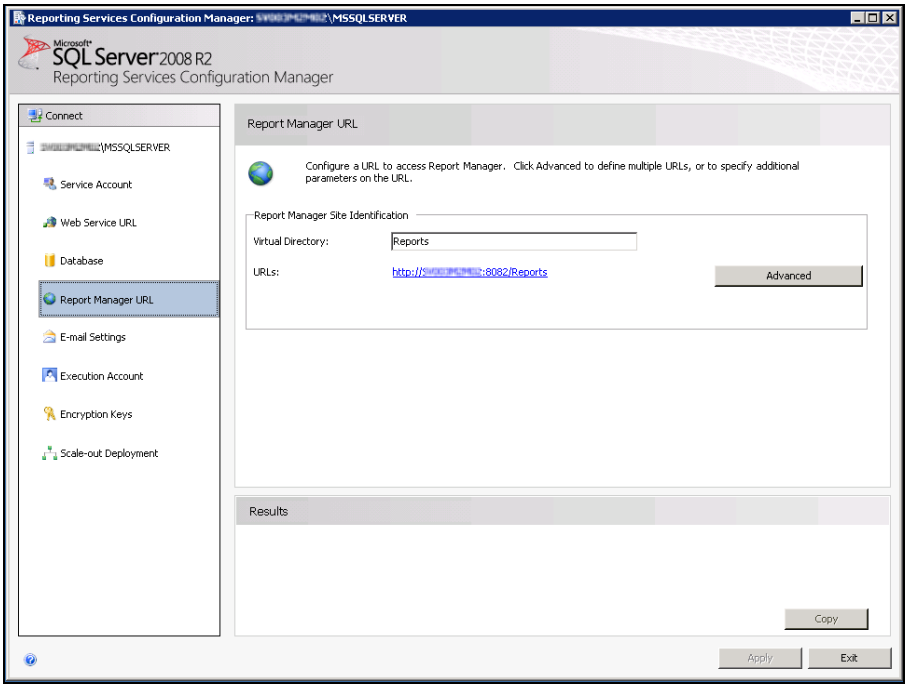


Important: Make a note of this URL. You will need it to deploy reports after Surveyor installation.

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.



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

Note: The default virtual directory is **Reports**.

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)**.