SQL Reports and Passport Query Builder Configuration Guide



V 12.05

Passport Business Solutions SQL Reports and Passport Query Builder Configuration Guide 06/15/2018

If you have any comments or suggestions about this guide, please send your feedback to:

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Passport Software, Inc. 181 Waukegan Rd. Suite 200 Northfield, IL 60093 847-729-7900 Main: <u>www.pass-port.com</u> Manufacturing: <u>www.pbsmfg.com</u>

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SQL Reports and Passport Query Builder Overview

This document provides the configuration for SQL Reports and Passport Query Builder.

Where Passport Query Builder is already configured, see the Query Builder User documentation.

Passport SQL Reports

SQL Reports will only functions with PBS SQL.

SQL Reports allows you to view the report data in a more graphical flexible SQL report format. When selected, the program launches Internet Explorer and the data is displayed there.

Once the report data displays in Internet Explorer, additional options become available. These include:

- Switching to other pages of the report
- Change the viewing size
- Find text in the report
- Move the report data and format to PDF, Excel or Word, which can be saved in those formats
- Re-enter any report criteria and refresh the report data
- Print the report
- Here is a sample page from the vendor history report:

Company:	Com	pany 00 S	QL 12.()5		SSI	RS Generate	d Report			Date/Tin	ne:	6/30/2017 4:43 PM
Jones Property	Mana	agement			400		2000-000		Pay Grp:	ACH			
						Ve	ndor Totals	Invc Amt	Discrits	Memo	Net Purch	Retnage	
			A/P	Account	2000-000		Original	100.00	1.00	0.00	99.00		
				Pay Grp	ACH		Open	0.00	0.00	(N/A)	0.00		
Invoice		Voucher	Doc #		Doc Type	Doc Date	Amount	Disc Amt	Dist Date	Journal	Cash Acct	Retnage	Reference
			P.O. #			Orig Amt	Opn Amt	Opn Disc					
	1254	1124		1254	Invoice	09/22/2015	100.00	1.00	09/22/2015	AP0101331	(N/A)		
				1151	Non-A/P check	09/22/2015	-100 00	-1 00	09/22/2015	AP0101331	1000-000		
					Invoice	100.00	0.00	0.00					*** INVOICE PAID ***
	1	fotals for	lone	a Pronert	v Mananement [.]	100 00	0.00	0 00					
	Page 7												

Accounts Payable Vendor History

SQL reports .rdl files are stored in a folder called RDL. You may copy, modify and publish any standard SQL report using Report Builder. Many reports will have the SQL Report option added. See examples of SQL reports:

- CTL > Reports > Valid G/L accounts
- A/P > Reports, Vendor > Vendor history
- A/P > Reports, Aged open items

Passport SQL Reports Requirements

SQL Reports are provided with your standard PBS SQL license and are installed with the PBS installation. More reports will become available in future updates.

With PBS SQL, Microsoft SQL Server 2008, 2012 or 2014 with Advanced Tools must be installed on the Server where PBS SQL is installed. The Express versions of SQL are acceptable. Advanced tools include SSRS, which is SQL Server Reporting Services. When installing SQL Server with Advanced tools, SSRS is configured automatically.

Make sure the port is open for accessing SQL Server Reporting Services for your network workstations.

SQL Reports Major Configuration Steps

This document covers the setup of SQL Reports. The sections for setting up SQL Reports include:

- 1. Configure SSRS
- 2. Starting the SQL Reports Configuration
- 3. Entering the Configuration

Passport Query Builder

Passport Query Builder is an application designed to create reports, using Passport Business Solutions data, based on any ODBC or AcuXDBC[™] source. It will access PBS Vision and PBS SQL system data. This document provides the instructions for configuring Passport Query Builder.

Configuring Passport Query Builder with an AcuXDBC source is limited to a one user license. If you need more than one user for Passport Query Builder you should switch to PBS SQL.

If you are licensed properly, Passport Query Builder is included with a PBS installation. See your Passport provider to get Passport Query Builder added to your license. You may also add Passport Query Builder to an existing v12.05 system.

Passport Query Builder Requirements

- You may use Passport Query Builder with PBS SQL or PBS Vision:
 - If you have PBS SQL, Microsoft SQL Server 2008, 2012 or 2014 with Advanced Tools must be installed on the Server where PBS SQL is installed. The Express versions of SQL are acceptable. Advanced tools include SSRS, which is SQL Server Reporting Services. When installing SQL Server with Advanced tools, SSRS is configured automatically.

Before installing PBS, we recommend that you install a new instance with SSRS included. If SSRS is not installed, you must download and install it on your SQL server. Following that, you must configure the Reporting Services Configuration Manager. For the steps on configuring SSRS, see <u>Adding Advanced Tools to SQL</u>.

If you have PBS Vision, you must have AcuXDBC installed, configured and running on the workstation before you may use Passport Query Builder.
 You must have PBS SQL, Microsoft SQL Server 2008, 2012 or 2014 with Advanced Tools installed on your workstation or server. The advanced tools will provide SSRS which is used for reporting. The vision data is copied periodically and becomes tables in SQL Server Management Studio. From that data you can create your reports.
 Passport Query Builder with PBS Vision can only be configured with one DSN on one

workstation. When there is more than one workstation with the same DSN the program creates multiple sets of SQL Tables. If you require multiple DSN's it is recommended that you go with PBS SQL.

If you are running a 32-bit version of XDBC you must also run an update to the registry where XDBC is installed. Take the *AcuXDBC driver restore.zip* file from the top-level PBS and copy it to the workstation. Extract the file *AcuXDBC driver restore.zip* file. Click on it to run it.

- .Net Framework 4.0 must be installed on the server where you install PBS with Passport Query Builder.
- Internet Explorer must be your default browser on each workstation using Query Builder. With the installation of Windows 10, Edge normally becomes the default browser. Verify that Internet Explorer is available and make it the default. Chrome cannot be used with Query Builder.
- Passport Query Builder will create queries and reports. For those that want to modify a query, Microsoft SQL Server Report Builder must be installed on those workstations. Microsoft SQL Server 2014 Reports Builder is available here: <u>https://www.microsoft.com/en-</u> us/download/details.aspx?id=42301

Passport Query Builder Installation and License

Passport Query Builder is installed on the server when PBS is installed. In order to use Passport Query Builder you must have an RW.LIC license that allows it to be installed. If you are not licensed for Passport Query Builder, see your Passport provider for a license upgrade.

The license program actually controls the number of MAC addresses accessed, not the number of users. For example, when the license count is for 5, the program will only allow 5 MAC addresses to access Passport Query Builder. There is a file in the QB folder called QBL.QBL. This file stores the MAC Address of each system where Passport Query Builder is accessed. As each MAC address accesses Passport Query Builder, another record, including a MAC address count, is added to the file.

The next day, this file is automatically removed and recreated the first time a user accesses Passport Query Builder from their workstation. You may want others to access Passport Query Builder after the maximum user count is reached. To reset the number of MAC addresses accessed, you may remove the QBL.QBL file at any time. Just make sure no one is using Passport Query Builder when you remove the file.

Configure SSRS Security

It is assumed that you already installed a new instance of SQL Server with Reporting Services. The initial configuration of SQL Server Reporting Services is done with this step. If not done, do this first.

It is also assumed that you have PBS installed. It is highly recommended that EZ Convert has been run to move PBS data into the new instance so that there is data to test the reporting.

Configuring SSRS security is required for both SQL Reports and Passport Query Builder.

SQL Reports only runs on PBS SQL. SQL Reports are standard with any SQL system.

Passport Query Builder will run on both PBS SQL and PBS vision. Passport Query Builder is licensed separately. The SSRS configuration for Passport Query Builder and SQL Reports are similar. Both are documented in this section.

Open SQL Server Reporting Services. This is on the server where the PBS SQL data is located. Login as an server administrator selecting the correct server and instance.

On the Report Manager see the URLs: link below.

"먉 C <u>o</u> nnect	Report Manager URL				
PAULS-PC\SQLEXPRESS2014	Configure a URL to access Report Manager. Click Advanced to define multiple URLs, or to specify additional parameters on the URL.				
💐 Service Account					
🍰 Web Service URL	Report Manager Site Identification				
	Virtual Directory: Reports_SQLEXPRESS2014				
🔰 Database	URLs: http://PAULS-PC:80/Reports_SQLEXPRESS2014 Advanced				
Report Manager URL					

Click on the URL link above to open the link in Internet Explorer.

Set up the security for the New Role Assignment and Site Settings.

Go back to the *Report Manager URL* tab and click on the URL link. A screen like the following displays:

(Home - Report Manager ×	× 命☆隠 @
🗙 🍓 Convert 🔻 🔂 Select	
	Home Site Settings Help
SQL Server Reporting Services	
- Home	Search 👂
🞬 New Folder 👘 🖳 New Data Source 👘 🗹 Folder Settings 👘 🥀 Upload File	🛄 Details View
There are no items in Home. Click Help for more information about this page.	
	~

Select *Folder Settings.* A screen like the following displays in Internet Explorer. Click on *New Role assignment:*

			1	- 0 ×
Http://pau	uls-pc/Reports/Pac 🔎 🔻 🖒 🧔 - Report Man	ager ×		슈 닸 않 🙂
🗴 🍕 Convert 👻 🛃 Se	elect			
			Ho	ome Site Settings Help
SQL Server F	Reporting Services			
- Home			Search	2
	🗙 Delete 🕴 🎥 New Role Assignmen	t 🔶		
Security	□ Group or User ↓	Role(s)		
	☐ Edit BUILTIN\Administrators	Content Manager		~

New Role Assignment screen

Select *New Role Assignment* as the arrow indicates above.

On the *New Role Assignment* screen, as seen below, enter the user name with domain, if domain is used. Select all check boxes and click OK.

	http://alexu-pc/Reports/Page	s/Ed Q z C Quanta David Marcara	Annu Dela Assistante Dan X	- □ ×
× 🖗	Convert - 🗟 Select	la rome - Report Manager	C New Kole Assignment - Kep A	
Home				Home Site Settings Help
æ	SQL Server Reporting	Services		·
1	New Role Ass	ignment		Search 👂
Use	this page to define role-based	security for Home.		
Grou Sele	p or user name: ct one or more roles to assigr	n to the group or user.		
	Role 🕹	Description		
	Browser	May view folders, reports and subscribe	to reports.	
	Content Manager	May manage content in the Report Serv	er. This includes folders, reports an	d resources.
	My Reports	May publish reports and linked reports;	manage folders, reports and resource	ces in a users My Reports folder.
	Publisher	May publish reports and linked reports t	to the Report Server.	
	Report Builder	May view report definitions.		
	OK Cancel			

In the top right hand corner click on *Site Settings*.

Site Settings screen

← → Ø http://alexu-p	c/Reports/Pages/Ser 🎗 🔻 🖒 🏉 Home - Report Manager 🖉 Site Settings - Report Mana 🗴	- □ × ⋒★®®
🗴 🍓 Convert 👻 🔂 Select	t	
Hom e		Home Site Settings Help
SQL Server F	Reporting Services	
🗧 💴 Site Set	tings	Search 🔎
General	Properties	
Security	Name: SQL Server Reporting Services	
	Select the default settings for report history:	
	Keep an unlimited number of snapshots in report history	
	O Limit the copies of report history: 10	
10040888	Report Timeout	
	O Do not timeout report	
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Limit report processing to the following number of seconds:	
	Custom Report Builder launch URL:	
	Apply	

Select the Security tab and click on New Role Assignment. Note that this New Role Assignment from the Site Settings screen is a different setting than the previous New Role Assignment from the Home screen.

	🗙 Delete 🔰 🎥 New Role Assignment	←
General	□ Group or User ↓	Role(s)
Security	Edit BUILTIN\Administrators	System Administrator

Enter your User ID (enter it with the domain if used).

You are now ready to configure SQL Reports and if licensed, Passport Query Builder.

SQL Reports and Passport Query Builder Configuration

SSRS must be set up before you can enter this configuration. See Configure SSRS.

The SQL Reports and Passport Query Builder Configurations are similar. The configuration only needs to be done once. After you configure SQL Reports, Passport Query Builder will use the same configuration and vice versa. Launching the entry screen is different for both:

Starting the SQL Reports Configuration

In the top-level PBS, find the RPTEXP.exe program. Launching this program the first time brings up the SQL Reports configuration screen. Note that, this program also publishes the SQL reports to SSRS.

Right click on RPTEXP.exe as run it as an administrator. Skip to Entering the Configuration.

Following the configuration this program will also publish the files in the RDL folder to SSRS. Please be patient with this step. If you have many companies this can take several minutes.

Note: If you need to *reconfigure* SQL Reports, you must remove the QBSSRS.QBV configuration file located in the QB folder under the top-level PBS. Run RPTEXP.exe and the program will prompt you to enter the settings. The program will create a new QBSSRS.QBV configuration file.

Starting the PBS Query Builder Configuration

To configure Query Builder, select this icon on the PBS menu.



Then click on the button below.



Entering the Configuration

The SQL Reports and PBS Query Builder Configuration screen appears like this:

Passport Query Builder™						
SQL Server Reporting Services Configuration:						
SSRS Instance:						
SSRS Database:						
SSRS Login:						
SSRS Password:						
SSRS Service URL:						
Report Server URL:						
Reports Root Dir.						
	Save	Cancel				

Refer to the *Reporting Services Configuration Manager* tabs for entering the following fields.

Tip: From the information on *Reporting Services Configuration Manager*, as you review each field below, copy and enter the configuration data to a text program like notepad. When you are sure you have everything it becomes simpler to copy and paste to the above screen. You may also save that text file to a secure location and if you find it necessary to enter the configuration again, you will be ready.

SSRS Instance:

This is the SQL server plus SSRS instance. If there is no instance, enter the server name only. For example, this field could be entered as *SQLServer**PBSREPORTS*

SSRS Database:

Enter the name. You will find this in *Reporting Services Configuration Manager* on the Database tab. Look for *Database Name:* It could be *ReportServer\$Instance*. The Instance part of the name is variable based on what you named it. If you installed SQL without an instance name, the database name would be *ReportServer*.

SSRS Login:

This can be any SQL account that has access to the SSRS database. System administrator (sa) is recommended.

SSRS Password:

Enter the password that matches the above SSRS Login: credentials.

SSRS Service URL:

Part of this field is taken from the Web Service URL tab of the *Reporting Services Configuration Manager*. URL examples are *http://SQLServer/ReportServer_Instance* or *http://SQLServer/ReportServer* if there is no instance.

Append to this URL the standard Report Server Web Service Endpoint. The Endpoint is always ReportService2010.asmx?wsdl

Here is an example of the Report Manager URL combined with the SQL Server default:

http://SQLServer/ReportServer/ReportService2010.asmx?wsdl

Report Service URL:

Enter the Report Manager URL from the *Reporting Services Configuration Manager*. This could be http://SQLServer/Reports_Instance or http://SQLServer/Reports if there is no instance.

Reports Root Dir:

Enter *PBS Reports* as the directory. It will be automatically created. Note: under the Reports Root Directory, a folder will be automatically created for each company you are accessing in Query Builder.

• The following screen is an example of a completed SQL Server Reporting Services Configuration:

Passport Query Builder™					
SQL Server Reporting Services Configuration:					
SSRS Instance:	SQLSever\PBSQB				
SSRS Database:	SSRSReportServer				
SSRS Login:	sa				
SSRS Password:					
SSRS Service URL:	http://PBSSQLServer/ReportServer/F				
Report Server URL:	http://PBSSQLServer/Reports				
Reports Root Dir:	Pbs Reports				
	<u>S</u> ave <u>C</u> ancel				

• Select *Save*. The program may take a minute. When it completes you should get this message:

If not, the configuration must be changed.

Publish SQL Reports

After you have successfully entered the configuration for SQL reports, the RPTEXP.EXE program also publishes the reports to SSRS. You do no not need to run the RPTEXP.EXE a second time to publish the reports. However, you may need to run it again later if you:

- You have changed the report server. You will need to remove the QBSSRS.QBV configuration file, run the RPTESP.EXP, re-configure and re-publish.
- Add a company to PBS which requires you to re-publish.

To test the configuration, in PBS run the A/P Vendor history report. Be sure to select a range that includes data. Also, select the *Print SQL report* field. If SQL Reports are configured properly the report will open in the default browser. To learn about the options read the help for the *Print SQL report* field.

Selecting a DSN for Passport Query Builder

If you have PBS SQL, you will create a new System DSN. If you have PBS Vision you must have AcuXDBC installed and configured with a System DSN.

Assigning an XDBC DSN in Passport Query Builder

When linking to PBS vision via ODBC, XDBC must be installed on your workstation and configured before you start this process. You will need a product code and key for AcuXDBC. Contact your Passport Partner to purchase an XDBC license. See the <u>ODBC Catalog Installation for XDBC</u>.

Once XDBC is installed and configured, you select the drop down field in the middle of the screen and select Create New ODBC Driver:



Note: Select XDBC drivers only. Make sure your Acu XDBC components are installed on your PC prior to this step.

Passport's Data Source Administrator screen displays.

Name	Driver	Add
PBSData00	SQL Server	Remove
		Configure
An ODBC	/XDBC User data source stores informa ed data provider. A User data source is ed on the current machine	ation about how to connect to s only visible to you, and can

Add a new System DSN. You must create your DSN through Passport Query Builder. Do not create it by using the ODBC Data Source Administrator. You will see a window like this:

P Create New Data Source			×
	Select a driver for which you want to Driver Name extend 10.0.1 AcuXDBC (32-bit) SQL Server	set up a data source.	
		Finish Cancel	

Select your driver.

There are several screens. Name the DSN QBPBSDATA00 if company ID 00. A brief description is provided. You may change the description if you like. Browse to your configuration file.

Enter a User ID	as syste	em and a	password	as manager.

P Create New Data Sour	ce)	×
	This wizard will help you create an XDBC data source that you can use to connect to PBS Vision System. What name do you want to use to refer to the data source? Name: [How do you want to describe the data source? Description: QB DSN Which configuration file do you want to use? Configuration File: Database Security : User ID : Password :	
	Finish Cancel]

You are returned back to Passport Query Builder.

Next, you <u>must</u> click on the *Export Data* button, as shown below, to create the SQL databases. This exports data to the SQL Server Management Studio database. You should run this function when everyone is out of PBS. Depending on the amount of data you have and your system resources, the export can take a while.



As the Export Data button refreshes the PBS data in the SQL database, it needs to be run periodically in order to have up-to-date information when running Passport Query Builder.

You can start developing new queries.

Creating a SQL DSN

A SQL DSN must be created on each workstation that accesses Passport Query Builder.

You must create your DSN through Passport Query Builder. Do <u>not</u> create it by using the ODBC Data Source Administrator.

This is how you create a new ODBC driver for SQL.

PBS Query Builder		
Help		
Passport Query Builder™		
	Select AcuXDBC Data Source Name 👻	Sal 🛐 🔊 🔎 💼
Cources :	Available Columns :	Celected Columns :

From the Source drop box, as seen below, select your SQL data source.



The PBS Data Source Administrator displays.

Name	Driver	Add
		Remove
		Configure
An OI the ind)BC/XDBC User data source stores inf dicated data provider. A User data sou	formation about how to connect to Irce is only visible to you, and can

• Select the *Add* button. This screen displays:

P Create New Data Source		Х
	Select a driver for which you want to set up a data source. Driver Name extend 10.0.1 AcuXDBC (32-bit) SQL Server	
	Finish Cance	2

• Select the driver name. In this case select *SQL Server*. This screen displays.

📔 Create New Data Source		Х
	This wizard will help you create an ODBC data source that you can use to connect to SQL Server. What name do you want to use to refer to the data source? Name: How do you want to describe the data source? Description: QB DSN Which SQL Server do you want to connect to? Server:	
	Database:	~
	Finish Cancel	

• Fill out required information for your new SQL Server Data Source. Enter the name as PBSDATAxx with xx being the company ID for the name. You may use the default description or change it. On the Server line enter your server and Instance. On the Database field select your database. It will look something like this:

📔 Create New Data Source	>	<
	This wizard will help you create an ODBC data source that you can use to connect to SQL Server. What name do you want to use to refer to the data source? Name: PBSData00 How do you want to describe the data source? Description: QB DSN Which SQL Server do you want to connect to? Server: QATEST\ZEUS4 \vee V Which SQL Server Database do you want to connect to?]
	Database: pbsdata00 ~	
	Finish Cancel	

• Click Finish. The PBS Data Source Administrator will have a new source like this:

	Driver	Add
PBSData00	SQL Server	Remove
		Configure

- This is your new DSN to be used in Passport Query Builder.
- Click *OK* to finish the setup.

Click OK and the Passport Query Builder window will display. Select the AcuXDBC Data Source Name:

PBSData00	~

After that, the Passport Query Builder Window displays that you may select <u>New Report</u>:

PBS Query Builder				- 🗆	×
<u>H</u> elp					
Passport Query B	uilder™				
🏼 🏹 😭 🔁	Select AcuXDBC Dat	a Source Name 🗸	SQL	<u>ي</u> (Ì
Reports :	Sources :	AvailableColumns :	Selected Colu	mns :	
New Report 2nd query APOPENAU aropen au123 cuscuh CustomerBalance My First SSRS Report My Second SSRS Report temp vendor balances					
- Source Options :					
	Views	 Tables 			
Your evaluation version expires	in 219 days			<u></u>	ose

• Now your Passport Query Builder is ready to create custom reports. To understand the buttons and functions of Passport Query Builder, see the <u>Query Builder User documentation</u>.

Refreshing SQL data using AcuXDBC

You will have to create the data for reporting using AcuXDBC. The first time the SQL Server Reporting databases are created. Each time after that they are updated. Updating is necessary because the data is no real-time when using AcuXDBC Passport Query Builder. As creating and refreshing the database can take a long time it is recommended that you do this function during off hours.

PBS Query Builder			
Teip			
Passport Qu	ery Builder		
		-	
		pbsdata00	~
- Reports :	Sources		- Available Columns :
New Report			

To update selection this button:

Permissions

You may provide permission for any SQL Report or Passport Query Builder report using *Reporting Services Configuration Manager*.

Launch *Reporting Services Configuration Manager* and go to the *Report Manager URL* tab. Click on the URL and it will launch Internet Explorer. You will be on the Home screen. You should see PBS Reports as the only folder. If not, you must finish configuring SSRS.

You may assign permissions to the main *PBS Reports* folder or any sub folder or file. As you see below, clicking on the down arrow to the right of PBS reports shows a menu:



From the menu above select Security. Select to Edit Item Security. You will see a window similar to this:

← 🕀 🏉 🏉 http://pa	- Control Cont				
🗙 🍕 Convert 🔻 🛃	Select				
Home		Home Site Setti			
SQL Server PBS Re	Reporting Services	Search			
	🗙 Delete 🕧 🤡 New Role Assignment 🕧 🖏 Revert to Parent Security				
Properties	□ Group or User ↓	Role(s)			
Security	 Edit BUILTIN\Administrators Edit PSI\psolberg 	Content Manager Browser, Content Manager, My Reports, Publisher, Report Builder			

Add, edit or remove security for the group or user.

Alternatively, under the PBS Reports folder, you may also configure security for PBSDATA00. Again you may add, edit or remove security for the group or user.

Under PBSDATA00 you may decide to configure security for EACH report individually. For example you may select *Security* for the APAgedOpenItemsVendor report:



Then select *Edit Item Security* and assign permission to a user or group.

A user or group cannot run a report if that user or group does not have the permission.

Modifying SQL Reports and Passport Query Builder Reports

Training

Passport will publish a general tutorial on how the PBS SQL reports are constructed. See that tutorial when it becomes available.

You should understand the workings of a SQL stored procedure. Search for online training.

You must understand the functions of Report Builder. Training for SSRS (Report Builder) is available online. Search for *wise owl tutorials ssrs* and links to YouTube videos will be available. Here is a recommended order or study:

- (SSRS) Part 1 Getting Started with a New Project
- (SSRS) Part 2 Data Sources and Datasets
- (SSRS) Part 3 Working with Tables
- (SSRS) Part 6 Grouping in Tables
- (SSRS) Part 7 Calculated Fields
- (SSRS) Part 11 Basic Parameters
- (SSRS) Part 12 Drop Down List Parameters
- (SSRS) Part 13 Null Values in Parameters
- (SSRS) Part 14 Cascading Parameters
- (SSRS) Part 8 Conditional Formatting in Tables
- (SSRS) Part 17 Linked Reports
- (SSRS) Part 18 Charts
- (SSRS) Part 19 Subreports

- (SSRS) Part 23 Report Variables and Group Variables
- (SSRS) Part 25 Adding Code to Reports
- (SSRS) Part 4 Keeping Header Rows Visible

Not all of the videos are included in the above list. You may also find some of the other videos useful.

Modification

You may open a SQL .RDL file report or a saved Passport Query Builder report in Report Builder and modify it.

Passport Query Builder reports are located wherever you stored them on your system.

The SQL reports are located in the RDL folder under the top-level PBS. There are some important things to consider when modifying a SQL report:

- If you change the name of the RDL file it will no longer be accessible from the PBS report on the menu.
- The PBS report passes the report criteria to the SQL report. If you modify the report to not use any of those values, the SQL report may not run properly.
- All SQL reports utilize views and custom stored procedures. A stored procedure for an SQL report has a name that starts with dbo.sp.VS_.
- To make a modified report accessible for all PBS users you must publish it

Before you modify a SQL report, make a backup of the original RDL file and save the stored procedure associated with the report. That way you can go back to the original if needed.

Adding Advanced Tools to SQL

If SSRS was installed at the time SQL Server was installed, there are no additional configuration steps. However, if SSRS was added to an existing SQL Server installation where PBS data exists, it will have to be installed and configured manually.

Download the SQL Express with Advanced Tools (SQLEXPRADV_x64_ENU.exe).

Start the install and select New SQL server stand-alone installation or add features to an existing installation.



Select Next.



髋 SQL Server 2012 Setup			_		×
Install Setup Files SQL Server Setup will now be i update will also be installed.	installed. If an update for SQL Server Setup	is found and specified to be included, the			
Product Updates Install Setup Files	SQL Server Setup files are being installed	on the system.			
	Task	Status			
	Scan for product updates	Completed			
	Download Setup files	Skipped			
	Extract Setup files	Skipped			
	Install Setup files	In Progress			
		< <u>B</u> ackinst	all	Cance	1

On the screen above the program is installing updates. There is no user action required.

On the screen below, add features to an existing install of SQL Server.

髕 SQL Server 2012 Setup					>	×
Installation Type Perform a new installation or ac	ld features to an existing	instance of SQL Serve	r 2012.			
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules	 <u>P</u>erform a new insta Select this option if components such a <u>A</u>dd features to an e <u>MSSQLSERVER</u> Select this option if want to add the An within an instance n <u>Installed instances:</u> 	llation of SQL Server 2 you want to install a r is SQL Server Manager existing instance of SQ you want to add feature alysis Services feature nust be the same edition	012 new instance of SQL S nent Studio or Integra L Server 2012 ures to an existing inst s to the instance that on.	erver or want to instal tion Services. tance of SQL Server. Fo contains the Database	l shared or example, you Engine. Features	
Installation Progress Complete	Instance Name MSSQLSERVER <shared compone<="" td=""><td>Instance ID MSSQL11.MSSQLS</td><td>Features SQLEngine, SQLEn SSMS, LocalDB</td><td>Edition Express</td><th>Version 11.0.2100.60 11.0.2100.60</th><td></td></shared>	Instance ID MSSQL11.MSSQLS	Features SQLEngine, SQLEn SSMS, LocalDB	Edition Express	Version 11.0.2100.60 11.0.2100.60	
			< <u>B</u> ack <u>N</u> ex	t > Cancel	Help	

Select "Reporting Services – Native" and click Next.

髋 SQL Server 2012 Setup		– 🗆 X
Feature Selection Select the Express features to in	istall.	
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Features: Instance Features Ø Database Engine Services SQL Server Replication Full-Text and Semantic Extractions for Search Reporting Services - Native Shared Features SQL Server Data Tools Documentation Components Management Tools - Basic SQL Client Connectivity SDK LocalDB Redistributable Features	Feature description: Includes Reporting Services, a server-based application for creating, managing, and delivering reports to email, multiple file formats, and interactive Web-based formats. The Native mode server provides all processing and management functionality through Reporting Services components. Reporting Services cannot be clustered. Prerequisites for selected features: Already installed: Microsoft .NET Framework 4.0 Microsoft Visual Studio 2010 Shell
	Select All Unselect All Shared feature directory: C:\Program Files\Micros Shared feature directory (<u>x</u> 86): c:\Program Files (x86)\M	soft SQL Server\
	< <u>B</u> ack	Next > Cancel Help

Click Next on Server Configuration below.

髋 SQL Server 2012 Setup				– 🗆 X
Server Configuration				
Specify the service accounts and	l collation configuration.			
Setup Support Rules	Service Accounts			
Installation Type Feature Selection	Microsoft recommends that you u	se a separate account for each	n SQL Server servi	ce.
Installation Rules	Service	Account Name	Password	Startup Type
Disk Space Requirements	SQL Server Reporting Services	NT Service\ReportServer		Automatic 🗸
Server Configuration				
Reporting Services Configuration				
Error Reporting				
Installation Configuration Rules				
Installation Progress				
Complete				
		< <u>B</u> ack <u>N</u> ext	> Can	cel Help

	"Install (Only" is	the only o	option.	Select it	and	click Next.
--	------------	----------	------------	---------	-----------	-----	-------------

髋 SQL Server 2012 Setup	- 🗆 X
Reporting Services Co	nfiguration
Specify the Reporting Services	configuration mode.
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Reporting Services Configura Error Reporting Installation Configuration Rules Installation Progress Complete	Reporting Services Native Mode Install and configure. Installs and configures the report server in native mode. The report server is operational after setup completes. Install gnly. Installs the report server files. After installation, use Reporting Services Configuration Manager to configure the report server for native mode. Reporting Services SharePoint Integrated Mode Installs the report server files. After installation use SharePoint Central Administration to complete the configuration. Verify the SQL Server Reporting Services service is started and create at least one SQL Server Reporting Services service application. For more information, click Help.
	< <u>B</u> ack <u>N</u> ext > Cancel Help

On the *Error Reporting* screen do not change anything. Click Next.

髋 SQL Server 2012 Setup	– 🗆 X
Error Reporting Help Microsoft improve SQL Se	rver features and services.
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Specify the information that you would like to automatically send to Microsoft to improve future releases of SQL Server. These settings are optional. Microsoft treats this information as confidential. Microsoft may provide updates through Microsoft Update to modify feature usage data. These updates might be downloaded and installed on your machine automatically, depending on your Automatic Update settings. See the Microsoft SQL Server 2012 Privacy Statement for more information. Read more about Microsoft Update and Automatic Update. Send Windows and SQL Server Error Reports to Microsoft or your corporate report server. This setting only applies to services that run without user interaction.
	< <u>B</u> ack <u>N</u> ext > Cancel Help

The Installation Progress screen displays.

髋 SQL Server 2012 Setup	-		×
Installation Progress			
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Install_sql_rs_Cpu64_Action : ProcessComponents. Updating component registration		
	Next > Cancel	Help	

This *Complete* screen indicates what was added.

髋 SQL Server 2012 Setup	- D >	<
Complete Your SQL Server 2012 installati	on completed successfully with product updates.	XXXXX
Setup Support Rules Installation Type Feature Selection Installation Rules Disk Space Requirements Server Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Installation Progress Complete	Information about the Setup operation or possible next steps: Feature Status	
	Close Help	

This completes adding SSRS to an existing SQL installation.

Next you must configure SSRS using Reporting Services Configuration Manager.

SQL Server Reporting Services Errors

Using Internet Explorer, when accessing the SQL Server Reporting Services home page you may get a message like this on the Home screen:

This page might not function correctly because either your browser does not support scripts or active scripting is disabled.

Seport Manager - Windows Internet Explorer	
🕽 🕞 💌 🦉 http://10.88.998.30 Reports/Pages/Folder.aspx 🔎 🛃 🗙 🍅	teport Manager 🗙 💮 🎲 🔅
le Edit View Favorites Tools Help	
SQL Server Reporting Services Home	Home My Subscriptions Site Settings Help Search for:
A This page might not function correctly because either your b sabled.	rowser does not support scripts or active scripting is
🖆 New Folder 👫 New Data Source 🎧 Upload File 🐒 Report B	ullder 🔡 Show Details
Data Sources	toricalReports

To remove this error do the following steps:

While in internet Explorer select Internet options:

Internet Options
General Security Privacy Content Connections Programs Advanced
Home page
To create home page tabs, type each address on its own line.
Use <u>c</u> urrent Use de <u>f</u> ault <u>U</u> se new tab
Startup
Start with tabs from the last session
Start with home page
Tabs
Change how webpages are displayed in tabs.
Browsing history ————
Delete temporary files, history, cookies, saved passwords, and web form information.
Delete browsing history on exit
Delete
Appearance
Colors Languages Fonts Accessibility
OK Cancel Apply

Select *Sites* on the *Security* tab:

Internet Options
General Security Privacy Content Connections Programs Advanced
Select a zone to view or change security settings.
🛛 🔮 🔩 🗸 🚫
Internet Local intranet Trusted sites Restricted sites
Trusted sites
This zone contains websites that you trust not to damage your computer or your files. You have websites in this zone.
Security level for this zone
Allowed levels for this zone: All
Prompts before downloading potentially unsafe content -
Enable Protected Mode (requires restarting Internet Explorer)
<u>Custom level</u> <u>D</u> efault level
<u>R</u> eset all zones to default level
OK Cancel Apply

The Trusted sites window displays:

Trusted sites	— ———————————————————————————————————
You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.	
Add this website to the zone:	
about:internet	Add
Websites:	
http://*.update.microsoft.com http://*.windowsupdate.com http://*.windowsupdate.microsoft.com http://go.microsoft.com	Remove
Require cerver verification (bttps:) for all sites in this zone	
	20110
	⊆lose

On this screen add the Reports Server URL as a trusted site.