

# **AES**

## **Adaptive Enterprise Solutions**

**...unlocking the dawn of better results for your organization**

### **CREATING CUSTOM REPORTS**



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8401 Colesville Road Suite 450  
Silver Spring, MD 20910  
800.237.9785 Toll Free  
301.589.3434 Voice  
301.589.9254 Fax  
[www.adsystech.com](http://www.adsystech.com)

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# Creating Reports Overview

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Users will need to download several programs in order to create custom reports themselves, all three are free and can be downloaded from the Internet:

- **FileZilla** will enable you to download a backup copy of your training database. See the FileZilla section for user instructions.
- **SQL Server 2005 Express Edition with Advanced Services** will enable you to use the Toolkit. Windows Installer 3.1 and .Net both need to be installed before the installation. See the SQL Server 2005 Express section for installation instructions.
- **SQL Server 2005 Express Edition Toolkit** provides additional tools and resources, including a creation and editing environment for reports using SQL Server Reporting Services. See the SQL Server Express Edition Toolkit section for installation instructions.

Once the software has been installed, you will be able to create custom reports using the training database you download using FileZilla. After creating a custom report, use the Reports page to upload the Report information and RDL file, and then publish the report to your client instance using the Report Permission page.

## *Glossary*

**Report Inventory** – Repository for storing all reports to be accessed within the system

**Report Publishing** – Once a report is uploaded into the Report Inventory it must be published to the reporting service before Users can be provided access

**Report Template (RDL)** – Report Design Language (RDL) provides the required descriptive information to render a report format for viewing; this template is populated with data based on the users data selection criteria “query”

**MS Visual Studios** – Microsoft’s Report Design tool is included in this development kit. The report designer can be used to design report templates that can be uploaded for use within the application.

**FTP DB Site** – Web site where the latest backup of the training database can be downloaded; this database can be used to build reports that are to be published

## *Process*

- Install three software programs – one time only
  - FileZilla
  - SQL Server 2005 Express Edition with Advanced Services
  - SQL Server 2005 Express Edition Toolkit
- Use FileZilla to download backup database
- Use Microsoft SQL Server Management Studio Express to restore database
- Use Microsoft SQL Server BIDS to create Report
- Upload Report and RDL file on Reports page
- Publish Report to your site on Report Permission page
- Assign Report to additional Applications on Reports page in Security Wizard (system administrator)
- Assign Report to User Groups on Reports Permission page in Security Manager (local or system administrator)

# Using FileZilla

Download FileZilla at <http://filezilla-project.org/> Adsystem will provide the necessary credentials to download files.



## Connect to the FTP Server

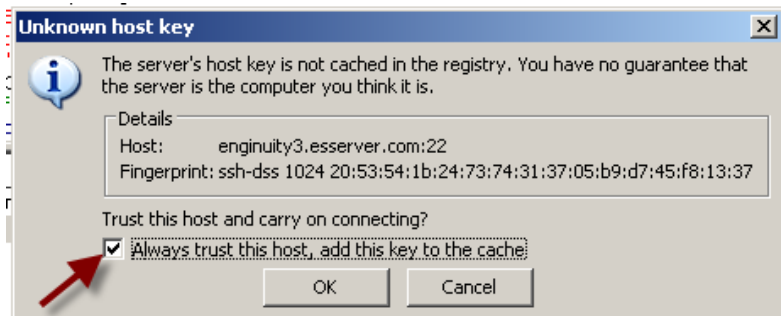
### Using Quick Connect bar

- 1 Enter address of the server into the Host field in the Quickconnect bar
  - a An SFTP server needs to have the address start with sftp, so it will be **sftp://enginity5.esserver.com**
- 2 Enter the port of the server into the port field if it is *not* the default port
  - a FTP default port = 21
  - b SFTP default port = 22
- 3 If you do not have a username and password, Adsystem will supply it for you
- 4 Click QUICKCONNECT or press ENTER to connect to the server

Note that Quick Connect is for quick connections, so there is no way to edit the quick connections list, which stores the last ten entries. To store FTP server names, you should use the Site Manager, instead.

- 5 First time Users will be prompted for a server host key
- 6 Click to create checkmark in ALWAYS TRUST THIS HOST
- 7 Click OK

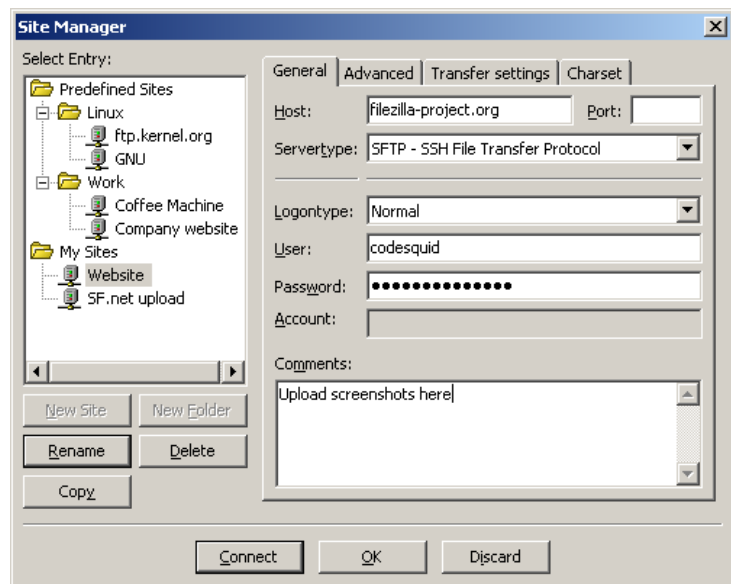
OR



## Using Site Manager

Site Manager allows FileZilla to store information about FTP sites.

- 1 Click File in the menu bar
- 2 Click Site Manager or press CTRL + S
- 3 Select the Target site in the Select Entry field
- 4 Host: sftp://enginity5.esserver.com
- 5 Port: 22
- 6 Server Type: SFTP – SSH File Transfer Protocol
- 7 Enter User name and password
- 8 Click CONNECT
  - a You can also Edit, Copy, Rename or Discard the site here

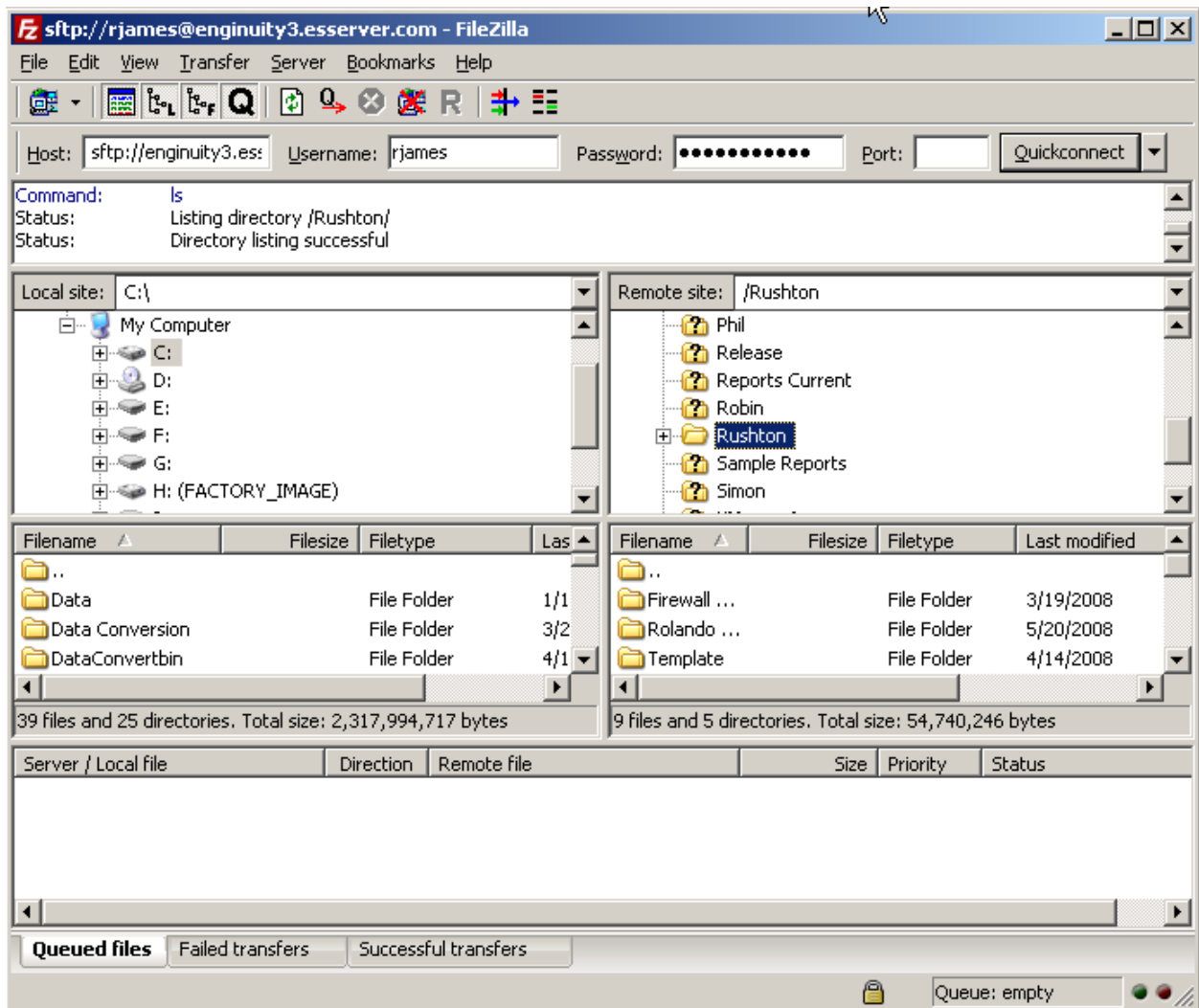


## Navigating on the server

After a successful connection attempt, a list of files and folders appears on the **right** side of the main window. The current folder is listed in the edit field on the top. Below this field, you will see the remote directory tree and below that, the contents of the current remote folder.

- 1 To change the current folder:
  - a Double click a folder in the file list
  - OR
  - b Click a folder in the directory tree
  - OR
  - c Enter the folder name into the edit field and press ENTER

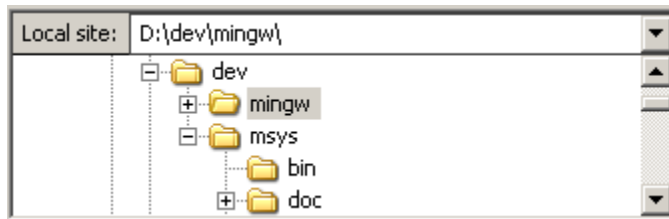
The folder called “..” is displayed in virtually all directories; click it to go up to the parent directory of the current folder.



**Remote site window** will show a folder with your client name on it. Inside that folder will be a folder called CustomReportDatabase. Inside that folder will be the backup database, it will be called AESxxxCustomReportDatabase and may have an extension of .bak or .rar. If it is rar, you will need to have RAR software to uncompress it. (xxx=your prefix numbers)

## Navigating on your own computer

Navigating on your own computer works almost like navigating on the server. The current local folder and the local directory tree are displayed on the **left** side of the main window by default. You will be putting the backup database file on your own computer, wherever you choose to store it. Click on the folder to receive the file.



## Transferring files


You can upload or download a file by double-clicking on it. It will be added to the transfer queue and the transfer starts automatically; it will transfer to the selected folder on the other side.

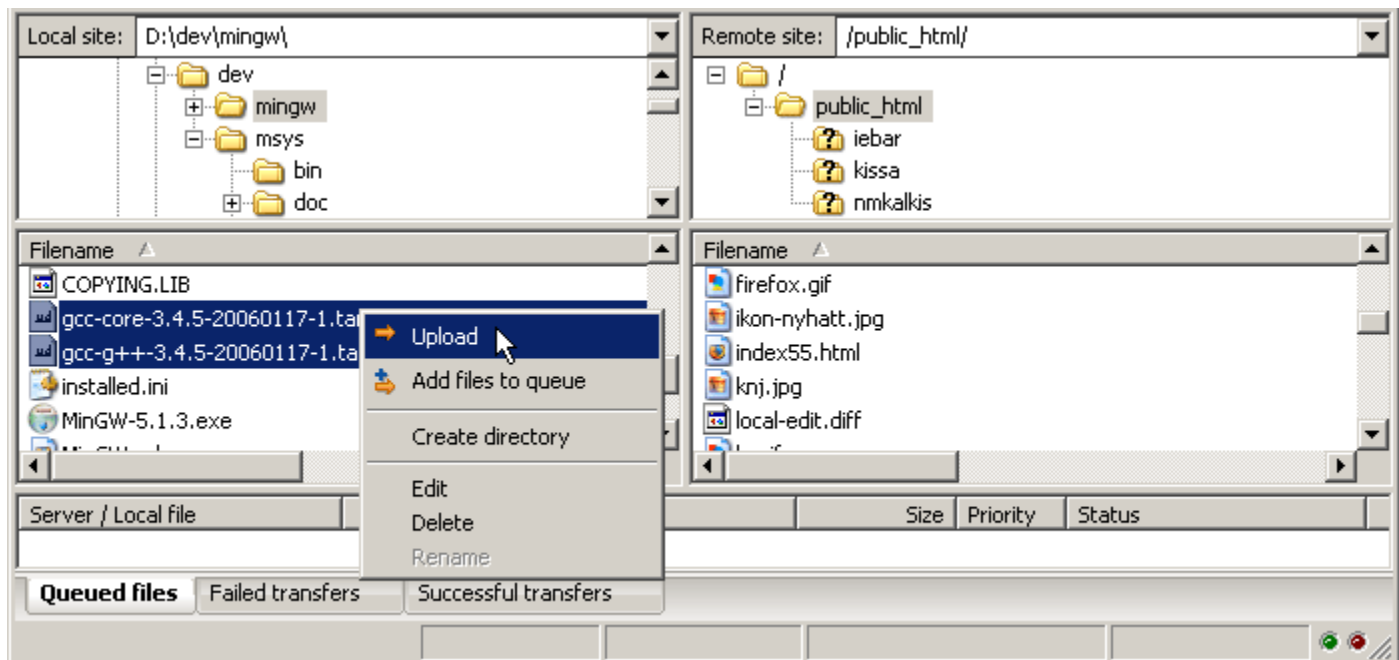
- 1 Click on the file(s) to select it/them
  - a To select multiple files, press and hold the CTRL key and click on each file
- 2 Right-click the selection
- 3 Select Upload

OR

- 4 Select a file(s) and drag to the correct folder on the other side
  - a A box is added to the arrow cursor while moving
  - b The destination folder will be highlighted when you are over it
- 5 Let go of the mouse button to add the file to the folder

OR

- 6 To put the file(s) into a queue and transfer them all later, select the file(s)
- 7 Right-click the selection
- 8 Select Add file to the Queue
- 9 When ready to transfer, click the Transfer button on the toolbar at the top of the page 



# Download SQL Server 2005 Express

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Microsoft SQL Server 2005 Express Edition with Advanced Services (SQL Server Express) is a new, free, easy-to-use version of SQL Server Express that includes a new graphical management tool and powerful features for reporting and advanced text-based searches. SQL Server Express provides powerful and reliable data management tools and rich features, data protection, and fast performance.

SQL Server Express with Advanced Services has all of the features in SQL Server 2005 Express Edition, and you can:

- Easily manage and administer SQL Server Express with a new easy-to-use graphical management tool -- SQL Server 2005 Management Studio Express (SSMSE).
- Issue full-text queries against plain character-based data in SQL Server tables. Full-text queries can include words and phrases, or multiple forms of a word or phrase.
- Run SQL Server Reporting Services reports on local relational data.

## Instructions to download and install

You must have administrative rights to install SQL Server 2005 Express Edition with Advanced Services

- 1 Open your Internet Browser and go to Microsoft SQL Server 2005 Express Edition Advanced Services page
    - a Enter web address: <http://www.microsoft.com/downloads/details.aspx?familyid=4C6BA9FD-319A-4887-BC75-3B02B5E48A40&displaylang=en>
  - 2 Install .NET Framework 2.0. For 32-bit platforms, download and install [the 32-bit version of Microsoft .NET Framework 2.0](#). For 64-bit platforms (x64 and EMT64 only), download and install [the 64-bit version of Microsoft .NET Framework 2.0](#).
    - a 32: enter web address: <http://www.microsoft.com/downloads/details.aspx?FamilyId=0856eacb-4362-4b0d-8edd-aab15c5e04f5&DisplayLang=en>
    - b 64: enter web address: <http://www.microsoft.com/downloads/details.aspx?FamilyId=b44a0000-acf8-4fa1-affb-40e78d788b00&DisplayLang=en>
  - 3 Click the DOWNLOAD button at the top of the Microsoft SQL Server 2005 Express Edition Advanced Tools page
    - a To start the installation immediately, click RUN
    - b To install SQL Server Express at a later time, click SAVE
- SQLExpr.exe is a self-extracting installation package of SQL Server Express.
- 4 Follow the installation instructions provided in the Readme file

# Download SQL Server Express Edition Toolkit

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Microsoft SQL Server 2005 Express Edition Toolkit (SQL Server Express Toolkit) provides additional tools and resources for SQL Server 2005 Express Edition and SQL Server 2005 Express Edition with Advanced Services. The SQL Server Express Toolkit contains SQL Server 2005 Management Studio Express, a graphical management tool, and Business Intelligence Development Studio, a creation and editing environment for reports using SQL Server Reporting Services.

The SQL Server Express Toolkit contains these two components:

- SQL Server 2005 Management Studio Express Edition – Easily manage SQL Server 2005 Express Edition and SQL Server 2005 Express Edition with Advanced Services database instances with this free, easy-to-use graphical management tool.
- Business Intelligence Development Studio (BIDS) – Create and edit reports for SQL Server 2005 Reporting Services (SSRS). BIDS provides the ability to create and edit Reporting Services projects that are reporting on local relational data in local SQL Server Express databases.

## Instructions to download and install

You must have administrative rights to install SQL Server 2005 Express Edition Toolkit

Microsoft .NET Framework 2.0 must be installed

- 1 Open your Internet Browser and go to Microsoft SQL Server 2005 Express Edition Toolkit page
  - a Enter web address: <http://www.microsoft.com/downloads/details.aspx?familyid=3C856B93-369F-4C6F-9357-C35384179543&displaylang=en>
- 2 Click the DOWNLOAD button at the top of the page
- 3 To start the installation immediately, click RUN
- 4 To install SQL Server Express Toolkit later, click SAVE

SQLExpr\_Toolkit.exe is a self-extracting installation package of SQL Server Express Toolkit.

- 5 Follow the installation instructions provided in the Readme file

Get updated product documentation for Toolkit from the SQL Server 2005 books Online:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=BE6A2C5D-00DF-4220-B133-29C1E0B6585F&displaylang=en>

Download samples and sample databases from CodePlex:

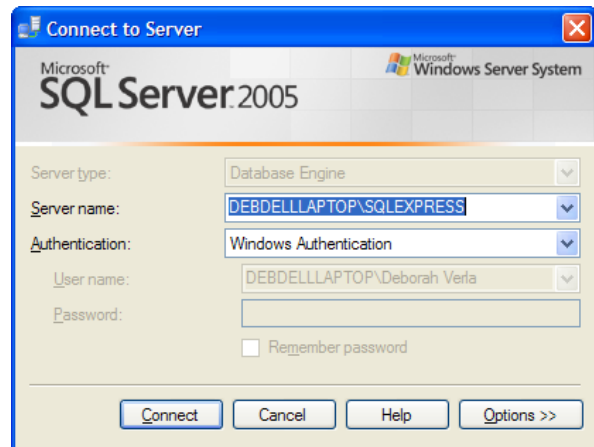
<http://www.codeplex.com/Wikipage?ProjectName=SqlServerSamples>

# Restore Backup

Use SQL Server Management Studio Express to restore the downloaded backup file.

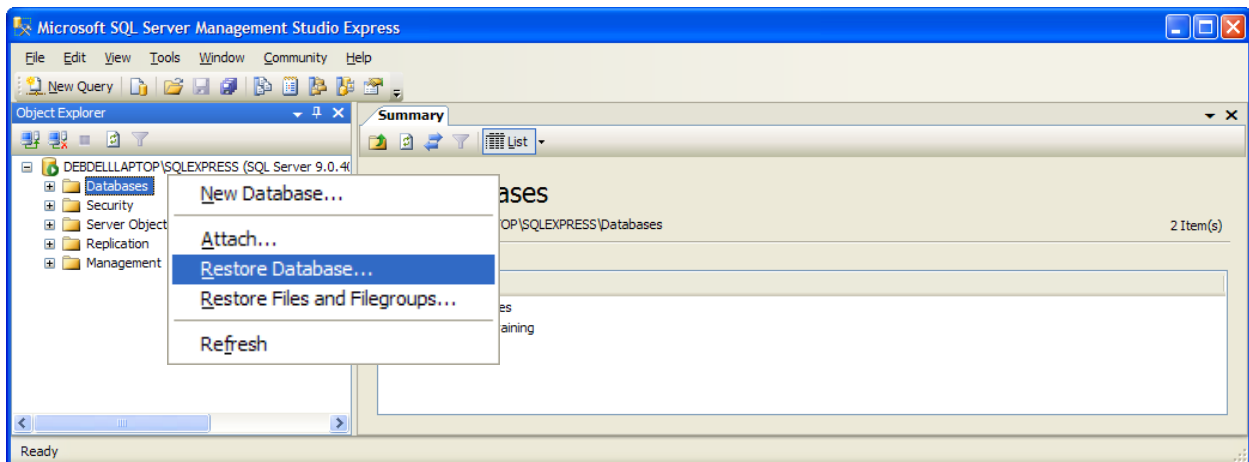
## Connect to Server

- 1 Server Name = name of your computer\SQLEXPRESS
- 2 Authentication should appear automatically in popup window
- 3 Click CONNECT  
Microsoft SQL Server Management Studio Express will open.



## Restore Database

- 1 Right click on DATABASES in Object Explorer on left side
- 2 Select Restore Database



In Restore Database popup window:

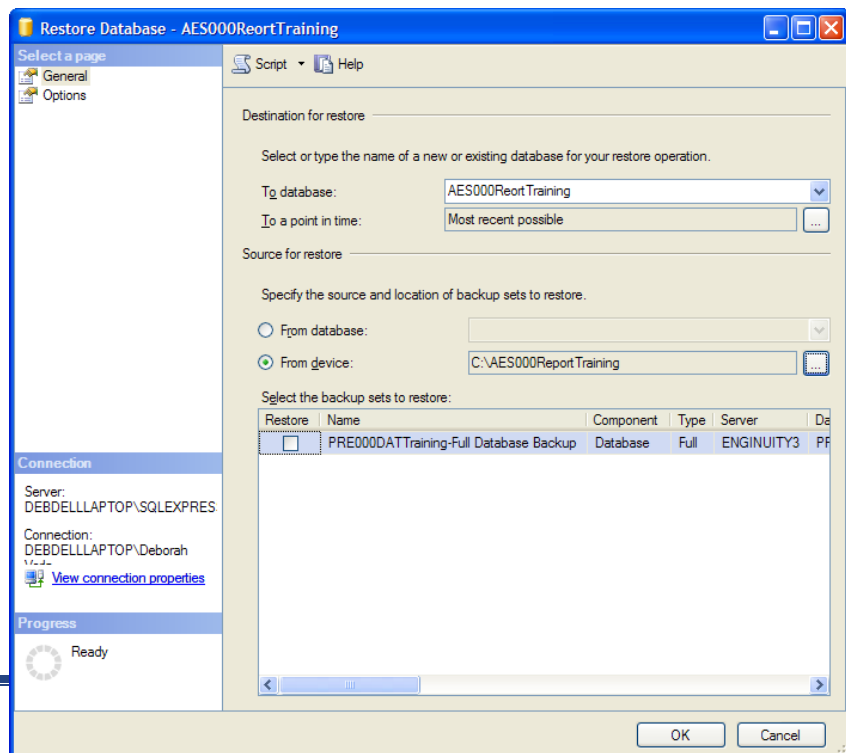
General will be selected in Select a page section on left side of page.

- 3 Enter or select To: Database
  - a If entering new name, it should be same name as backup file
  - b When backing up a later version, the name can be selected in the dropdown

- 4 Click to create circle in From Device radio circle
- 5 Click .. Button at end of From device field

In Specify Backup popup window:

- 6 Click ADD
- 7 Navigate to backup file location
  - a You may need to change File of type to: ALL FILES in order to see backup file



- 8 Select Backup file
- 9 Click OK
- 10 File will be displayed in BACKUP LOCATION field on specify Backup popup window
- 11 Click OK

File will now be displayed in SELECT THE BACKUP SETS TO RESTORE: window on Restore Database popup window

- 12 Click to create checkmark next to backup file

- 13 Click OPTIONS in Select a page on left side of Restore Database popup window

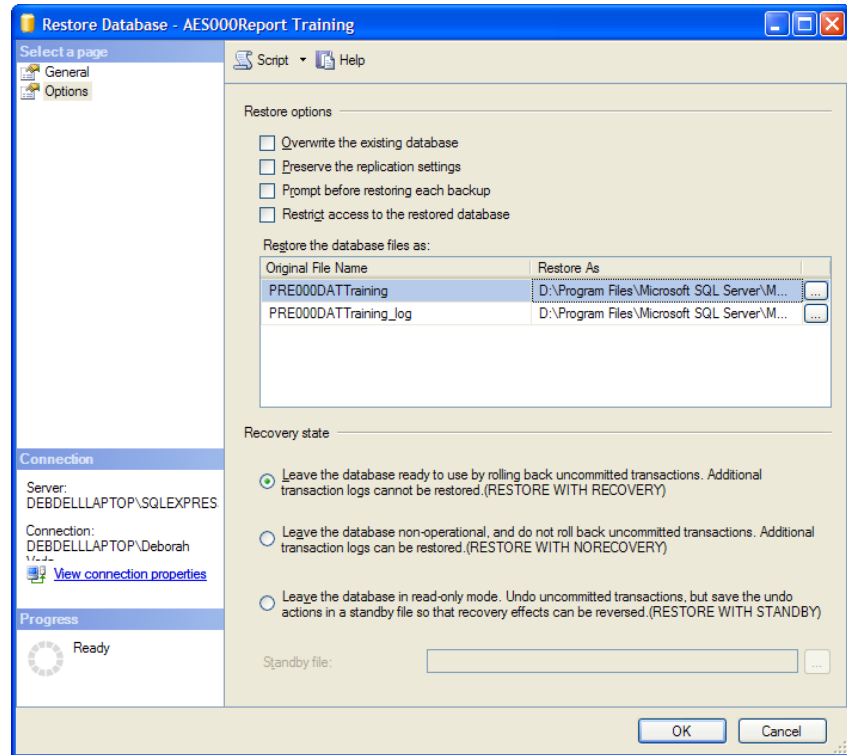
You will see the backup file and the backup log file listed on the right side of the window. Look at the locations listed in the Restore As column; they may need to be changed. My Standard Installation tried to put the backup file in **D:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\DATA\AES000DATTraining.mdf**. I needed to change the D to a C; yours may be different.

- 14 If this is your first restore, you will not need any options checked

- a If this is not the first restore, and you want to overwrite the original restore file, click to create a checkmark in the Overwrite the existing database checkbox

- 15 Click OK

It will take a while to restore the file, then it will appear in the Object Explorer section when the + next to Databases is clicked.



# Create Report

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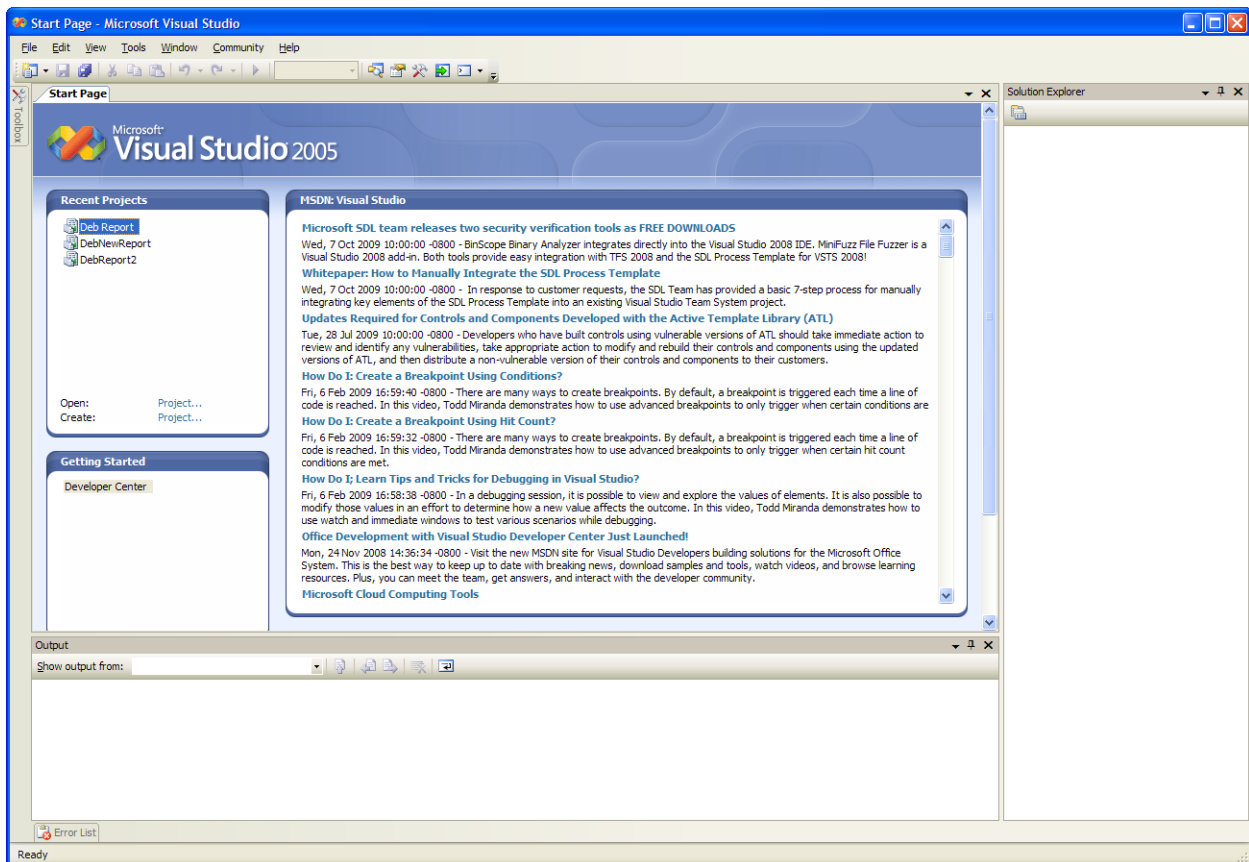
Use Business Intelligence Development Studio to create Reports. There are several places to find documentation for BIDS.

An introduction to the program can be found at

[http://msdn.microsoft.com/en-us/library/ms173767\(SQL.90\).aspx#ToolWindows](http://msdn.microsoft.com/en-us/library/ms173767(SQL.90).aspx#ToolWindows)

Get updated product documentation for Toolkit from the SQL Server 2005 books Online:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=BE6A2C5D-00DF-4220-B133-29C1E0B6585F&displaylang=en>



Existing projects Reports will be listed in Recent Projects area; click on the Project name to open it or click File Menu | Open or File Menu | Recent Files and select from the list.

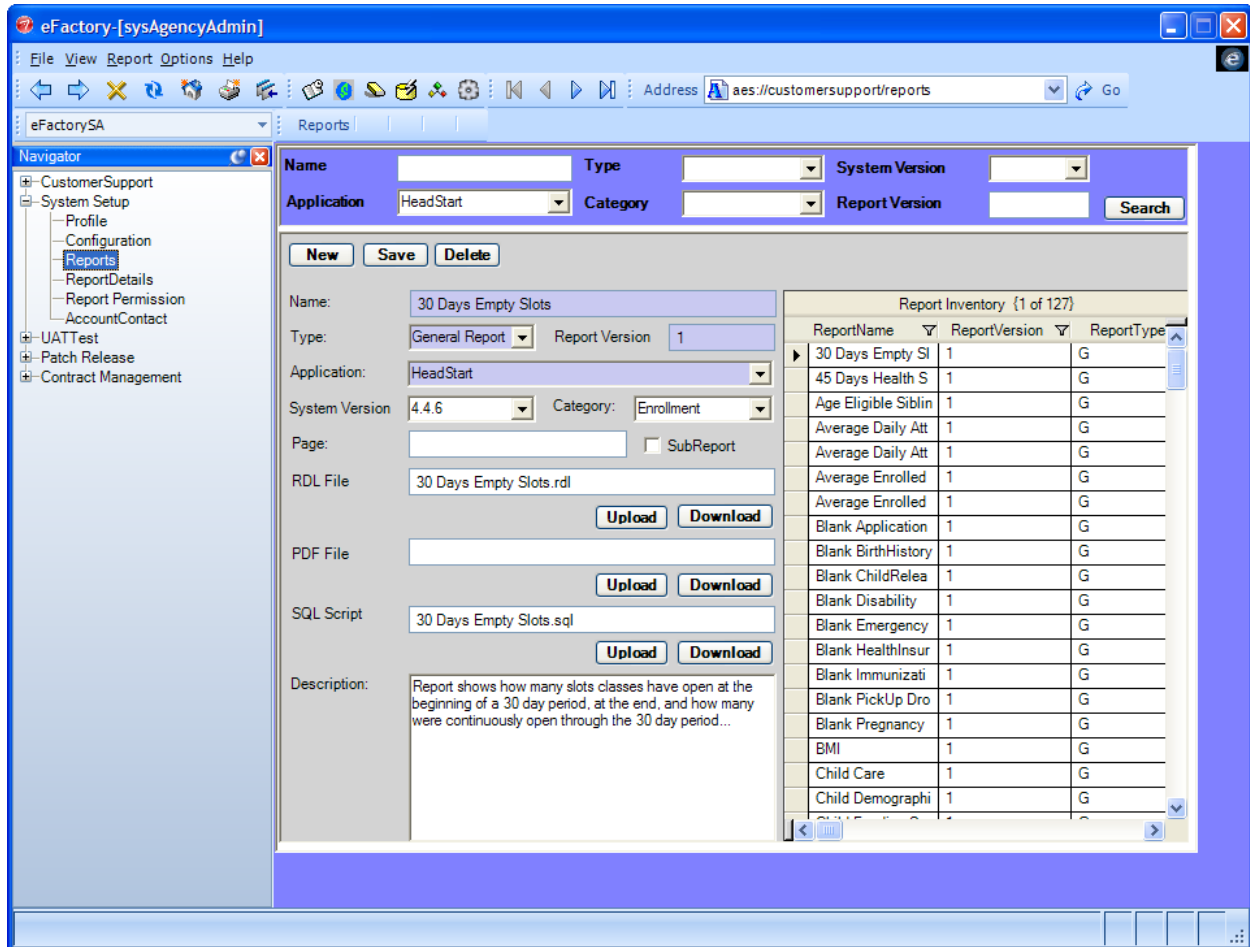
To open an existing Project, click on PROJECT next to OPEN to open popup window

To create new Project and Report click on PROJECT next to CREATE;; this will open the New Project popup window.

After the Report is created, it will be saved as an RDL file and can be uploaded into the Report Inventory.

# Reports Page

Use this page to upload the new Reports to the Reports Inventory, also to view reports currently in Inventory or to download RLD files, PDF files or SQL Script files.



## *Navigating the Reports Page*

- Search for existing Reports in the top section
- All Matching Reports will be displayed in the Report Inventory Grid on the right side
- Information about the selected report will be displayed on the left side

### **Upload new Report**

- 1 Click NEW button at top of page
- 2 Enter Name of Report
- 3 Select Type of Report
  - a Adhoc Report
  - b Application Report
  - c General Report
- 4 Enter Report Version
- 5 Select Application
  - a Only one Application may be selected here, but more may be assigned in Security Wizard
- 6 Select System Version
- 7 Select Category
  - a Not all reports will have a category
- 8 Select Page
  - a Only Application Reports have a page
- 9 Click to create checkmark in the Sub Report checkbox if this report is a sub report
- 10 Click UPLOAD button beneath RDL File field
  - a Navigate to correct RDL file
  - b Click OPEN
- 11 Click UPLOAD button beneath PDF File field
  - a Navigate to correct PDF file
  - b Click OPEN
- 12 Click UPLOAD button beneath SQL Script field
  - a Navigate to correct SQL file
  - b Click OPEN
- 13 Enter Description of Report
- 14 Click SAVE at top of page
  - a Use DELETE to remove unneeded Report record
- 15 Repeat for additional Reports

### **View current Reports**

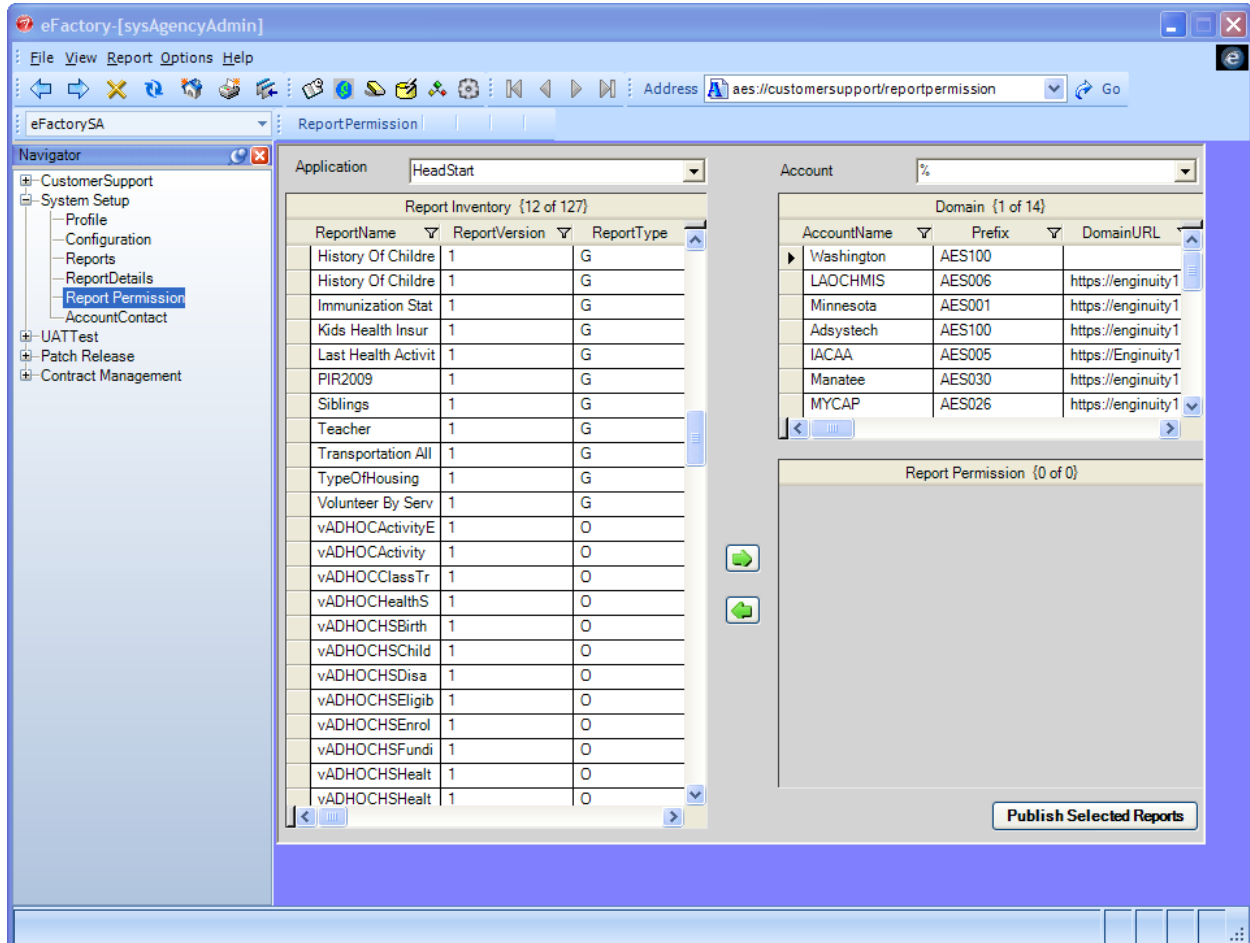
- 1 Select any one or more of
    - a Report Name
    - b Type
      - i) Adhoc Report
      - ii) Application Report
      - iii) General Report
    - c System Version
    - d Application
    - e Category
    - f Report Version
  - 2 Click SEARCH
- All matching Reports will be displayed in REPORT INVENTORY GRID.

### **Download RDL, PDF or SQL Script file to local computer**

- 1 Select correct Report in REPORT INVENTORY GRID
- 2 Click DOWNLOAD button beneath the file to download
- 3 In popup window, navigate to correct location to save file
- 4 Click SAVE

# Set Report Permission

Use this page to publish the report to your own site. Once published, it will appear in Security Wizard on the Reports page. Once permission is granted to applications, permission will need to be granted in Security Manager.



## Navigating the Report Permission Page

- Reports in Reports Inventory on Reports page will be displayed in REPORT INVENTORY GRID on left side of page
- Publish Selected Reports button publishes selected Report to selected Client Domain

## Publish Report

- 1 Select Application in dropdown
- All reports from Reports page will appear in REPORT INVENTORY GRID.
- 2 Select Report to be published in REPORT INVENTORY GRID
  - 3 Select Account in dropdown on right side of page
  - 4 Select Domain in Domain Grid
  - 5 Click PUBLISH SELECTED REPORTS button

# Assign Applications to Report

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The Report is assigned to one Application on the Reports page.

- If that is the only Application using the Report, no other work needs to be done in Security Wizard
- If the Report does need to be assigned to additional Applications, follow the following procedure

## On the Reports page

- 1 Select the Report Type in the dropdown at top of page
- 2 Select Report(s) to assign in the REPORTS LIST GRID
- 3 Select the Application(s) in the APPLICATION GRID at upper right side of page
- 4 Click Right Green Arrow button to assign
  - a Use the Left Green Arrow button to remove unwanted Reports from the Application

# Assign Permission to Report

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The Report will then need to be assigned to User Group(s).

## On the Report Permission page

- 1 Select the Report Type in the dropdown on the left side of the page
- 2 Select the Application
- 3 Select Category, if needed
- 4 Click FIND
- 5 Reports will be displayed in the REPORT LIST GRID on the bottom left side of page
- 6 Select the Report(s) to assign permission for
- 7 Select the Group(s) that should have permission to the Report
- 8 Click the right Green Arrow button
  - a Use the Left Green Arrow button to remove unwanted Permissions from a Group