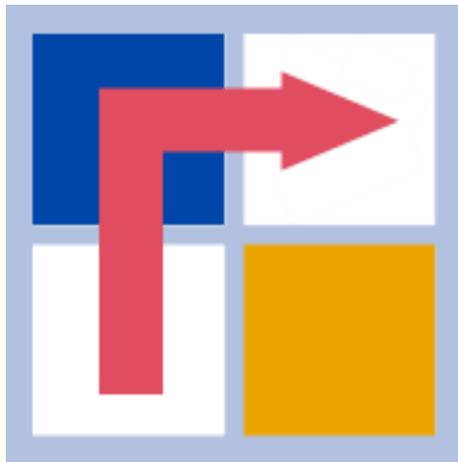


Strategic Reporting Systems, Inc.



Simple, yet Powerful!

ReportSmith® Installation Guide

ReportSmith Installation Guide

INSTALLATION

This document describes how to install ReportSmith Desktop, ReportSmith Enterprise, and ReportSmith Web with Enterprise.

Note: Before proceeding with the installation, make sure you meet all the system requirements. For system requirements see <http://www.srs-inc.com/Features/Integration.asp>.

Some sample data sources are included, enabling you to install the product and learn how to use ReportSmith without being connected to a specific source. However, to create reports using your own data, you need to connect your system to a compatible data source.

ReportSmith Desktop Installation

The ReportSmith Desktop installation is for both a network and non-network environment where only a single person is using ReportSmith to create, edit, schedule, run, view and save reports. The Desktop installation also installs the Report Scheduler.

To install ReportSmith Desktop from a CD:

1. Insert the ReportSmith CD-ROM into the CD-ROM drive.
The installation should begin automatically.
-or-
If installation does not begin automatically:
 - From the **Start** menu, click **Run** to display the Run dialog box.
 - In the **Open** box, type **x:\setup.exe**, where **x** is the letter of your CD-ROM drive.
2. Follow the installation instructions in the dialog boxes that appear.

To install ReportSmith Desktop from a downloaded file:

1. Double-click the zip file downloaded.
2. Double-click the setup.exe file.
The installation should begin automatically.
3. Follow the installation instructions in the dialog boxes that appear.

ReportSmith Enterprise Installation

The ReportSmith Enterprise installation is for a network environment where multiple users are using ReportSmith to create, edit save and run reports. There are three types of installations:

- Report Server
- Desktop
- Viewer

Before installing ReportSmith Enterprise, you must first designate a computer as the Report Viewer users to share reports across the enterprise.

To install the ReportSmith Enterprise Report Server from a CD:

1. Insert the ReportSmith CD-ROM into the CD-ROM-drive.
The installation should begin automatically.
-or-
If the installation does not begin automatically:
 - From the **Start** menu, click **Run** to display the Run dialog box.
 - In the Open dialog box, type **x:\setup.exe**, where **x** is the letter of your CD-ROM drive.
2. Select **ReportServer** then follow the instructions in the dialog boxes that appear.

To install ReportSmith Enterprise Report Server from a downloaded file:

1. Double-click the zip file downloaded.
2. Double-click the setup.exe file.
The installation should begin automatically.
3. Select **ReportServer** then follow the instructions in the dialog boxes that appear.

Note: You must install the Report Server before you can perform any Desktop Viewer installations. Also, the person performing the installation on the server must have administrative privileges on the server computer to ensure that the installation works properly. Any software needed to connect to a database must be installed and configured on the Report Server in order to schedule reports.

ReportSmith Desktop Installation

The ReportSmith Desktop installation is a full installation that you install on each client workstation and is used to create, edit, schedule, run, view and save reports. ReportSmith stores reports in the Catalog found on the Report Server at the location specified during the ReportSmith Server installation. Reports you have scheduled using the Desktop are run on the Report Server. It is important that the person installing the ReportSmith Desktop has administrative privileges on that computer to ensure that the installation works properly.

Note: Before performing the Client installation, get the Universal Naming Convention (UNC) of the computer where the Report Server is installed. A UNC has the format `\\server\folder` where server is the ReportSmith Server and folder is the folder on the server in which ReportSmith is installed. For more information, see your system administrator.

To install ReportSmith Enterprise Desktop from a CD:

Note: You must install the Report Server before you can install the Client.

1. Insert the ReportSmith CD-ROM into the CD-ROM drive.
The installation should begin automatically.
-or-
If the installation does not begin automatically:
 - From the **Start** menu, click **Run**.
 - In the **Open** box, type `x:\setup.exe`, where **x** is the letter of your CD-ROM drive.
2. Select the **Desktop** option, and then follow the instructions in the dialog boxes that appear.
3. When prompted for the location of the Report Server, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation in the following format: `\\server\folder`

To install ReportSmith Enterprise Desktop from a downloaded file:

1. Double-click the zip file downloaded.
2. Double-click the setup.exe file.
The installation should begin automatically.
3. Select the **Desktop** option, and then follow the instructions in the dialog boxes that appear.
4. When prompted for the location of the Report Server, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation in the following format: `\\server\folder`

ReportSmith Viewer Installation

The ReportSmith Viewer installation is a full installation that you install on each client workstation and is used to schedule, run and view reports. ReportSmith stores reports in the Catalog found on the Report Server at the location specified during the ReportSmith Server installation. Reports you have scheduled using the Viewer are run on the Report Server. It is important that the person installing the ReportSmith Desktop has administrative privileges on that computer to ensure that the installation works properly.

Note: Before performing the Client installation, get the Universal Naming Convention (UNC) of the computer where the Report Server is installed. A UNC has the format `\\server\folder` where server is the ReportSmith Server and folder is the folder on the server in which ReportSmith is installed. For more information, see your system administrator.

To install ReportSmith Enterprise Viewer from a CD:

Note: You must install the Report Server before you can install the Client.

1. Insert the ReportSmith CD-ROM into the CD-ROM drive.
The installation should begin automatically.
-or-
If the installation does not begin automatically:
 - From the **Start** menu, click **Run**.
 - In the **Open** box, type `x:\setup.exe`, where **x** is the letter of your CD-ROM drive.
2. Select the **Viewer** option, and then follow the instructions in the dialog boxes that appear.
3. When prompted for the location of the Report Server, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation in the following format: `\\server\folder`

To install ReportSmith Enterprise Viewer from a downloaded file:

1. Double-click the zip file downloaded.
2. Double-click the setup.exe file.
The installation should begin automatically.
3. Select the **Viewer** option, and then follow the instructions in the dialog boxes that appear.
4. When prompted for the location of the Report Server, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation in the following format: `\\server\folder`

ReportSmith Web with Enterprise Installation

ReportSmith Web with Enterprise allows you to schedule, run and view reports through a browser. It is important that the person installing the Web server has administrative privileges on that computer to ensure that the installation works properly.

Note: Before performing the Web installation, have the Universal Naming Convention (UNC) of the computer where the Report Server is installed. For more information, see your system administrator.

ReportSmith Web with Enterprise Installation

To ensure that the installation goes smoothly, you must have administrative privileges on this computer.

Note: You must install the Report Server before you can install ReportSmith Web.

■ To Install ReportSmith Web Server from a CD:

1. Stop all Internet Information Server (IIS) services.
2. Insert the ReportSmith CD-ROM into the CD-ROM drive. The installation should begin automatically.
-or-
If the installation does not begin automatically:
 - From the **Start** menu, click **Run** to display the Run dialog box.
 - In the **Open** box, type **x:\setup.exe**, where **x** is the letter of your CD-ROM drive.
3. Select **WebServer** then follow the instructions in the dialog boxes that appear.
4. If the Report Server and Web Server are on different machines, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation (i.e. \\server\folder) when prompted for the location of the Report Server. A UNC has the format \\server\folder where server is the ReportSmith Server and folder is the folder on the server in which ReportSmith is installed.
or
If the Report Server and Web server are on the same machine, navigate to the folder where the Report Server is installed and select that location (i.e. x:\ReporSmith) when prompted for the location of the Report Server

To install ReportSmith Web Server from a downloaded file:

1. Double-click the zip file downloaded.
2. Double-click the setup.exe file.
The installation should begin automatically.
3. Select **Web Server** , and then follow the instructions in the dialog boxes that appear.
4. If the Report Server and Web Server are on different machines, enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation (i.e. \\server\folder) when prompted for the location of the Report Server
or
If the Report Server and Web server are on the same machine, navigate to the folder where the Report Server is installed and select that location (i.e. x:\ReportSmith) when prompted for the location of the Report Server

Installation Prerequisites

Configuring Internet Information Services

Before running reports through ReportSmith Web with Enterprise, the following change must be made to Internet Information Server (IIS):

1. On the Web Server, start IIS.
2. Expand Local Computer.
3. Expand Websites.
4. Expand Default Website.
5. Expand rscatalogasp
6. Right-click on Downloads and select Properties.
7. If the Read box is checked, click to uncheck it.
8. Click Apply.

Installing ReportSmith on Windows 2003 Server or higher

Before installing the Report Server on a Windows 2003 server or higher, the following configuration changes need to be made:

1. Go to Start, Control Panel and select System.
2. Select the Advanced Tab.
3. Under Performance, click Settings.
4. Select the Data Execution Prevention tab.
5. Select the *Turn on DEP for essential Windows programs and services only* option, and click OK for all screens.
6. Reinstall ReportSmith.
7. Once the ReportSmith installation is completed, perform steps 1-4 again, and select *Turn on DEP for all programs and services except those I select*. The following items should then be added:
 - rptsmith.exe
 - sched.exe
 - bdecfg32.exe

Configuring Internet Information Services (IIS) for Windows 2008 Server

When installing the Web Server on a 2008 Server machine, verify the settings for IIS are configured as follows:

Roles		
	View the health of the roles installed on your server and add or remove roles and features.	
	Web Server	Installed
	Common HTTP Features	Installed
	Static Content	Installed
	Default Document	Installed
	Directory Browsing	Installed
	HTTP Errors	Installed
	HTTP Redirection	Not installed
	Application Development	Installed
	ASP.NET	Not installed
	.NET Extensibility	Not installed
	ASP	Installed
	CGI	Not installed
	ISAPI Extensions	Installed
	ISAPI Filters	Not installed
	Server Side Includes	Not installed
	Health and Diagnostics	Installed
	HTTP Logging	Installed
	Logging Tools	Not installed
	Request Monitor	Installed
	Tracing	Not installed
	Custom Logging	Not installed
	ODBC Logging	Not installed
	Security	Installed
	Basic Authentication	Not installed
	Windows Authentication	Not installed
	Digest Authentication	Not installed
	Client Certificate Mapping Authentication	Not installed
	IIS Client Certificate Mapping Authentication	Not installed
	URL Authorization	Not installed
	Request Filtering	Installed
	IP and Domain Restrictions	Not installed
	Performance	Installed
	Static Content Compression	Installed
	Dynamic Content Compression	Not installed
	Management Tools	Installed
	IIS Management Console	Installed
	IIS Management Scripts and Tools	Not installed
	Management Service	Not installed
	IIS 6 Management Compatibility	Installed
	IIS 6 Metabase Compatibility	Installed
	IIS 6 WMI Compatibility	Not installed
	IIS 6 Scripting Tools	Not installed
	IIS 6 Management Console	Not installed
	FTP Publishing Service	Installed
	FTP Server	Installed
	FTP Management Console	Not installed

Configuring Internet Information Services (IIS) for Windows 2008 R2 Server

When installing the Web Server on a 2008 R2 Server machine, verify the settings for IIS are configured as follows:

Add Role Services [X]

 **Installation Results**

Role Services
Web Server (IIS)
 Role Services
Confirmation
Progress
Results

The following roles, role services, or features were installed successfully:

Web Server (IIS)  **Installation succeeded**

The following role services were installed:

Web Server

- Common HTTP Features
 - Static Content
 - Default Document
 - Directory Browsing
 - HTTP Errors
- Security
 - Request Filtering

Management Tools

- IIS Management Console
- IIS 6 Management Compatibility
- IIS 6 Metabase Compatibility

FTP Server

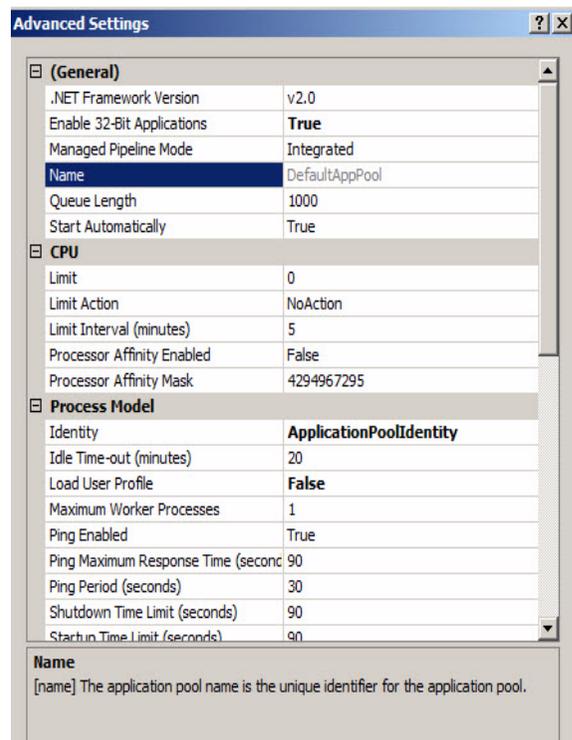
- FTP Service
- FTP Extensibility

[Print, e-mail, or save the installation report](#)

< Previous Next > Close Cancel

Configure IIS Application Pool Settings on Windows 2008 R2 Server

Verify that the Application Pool Settings Advanced Settings are configured as follows:



Configuring Windows Firewall on the Web Server

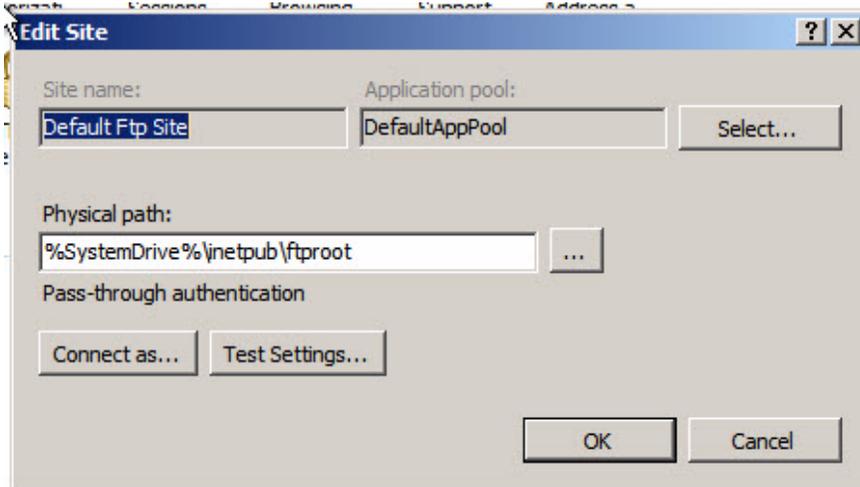
After installing the ReportSmith Web server, Windows firewall must be configured as follows:

1. Go to Control|System and Security|Windows Firewall
2. Select Turn Windows Firewall On or Off
3. Under *Domain network locations and settings*, select Turn off Windows Firewall
4. Click OK to save the changes.

Configuring FTP on Report Server

After installing Internet Information Server, configure FTP as follows:

1. Start IIS
2. Expand the website
3. Select Default Ftp set
4. Select Basic Settings
5. Set the parameters as defined below:



Configuring TCPMain to run as a service

After installing ReportSmith Web with Enterprise Web Server, the tcpmain service needs to be configured to run under an account with domain privileges.

1. Go to Start=>Control Panel =>Services
2. Select tcpMainServer
3. Select the Log On tab
4. Select This Account:
5. Enter a user and password that has administrative privileges on the domain.
6. Click OK.
7. Restart the service.

