

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 applications.

Note: Before proceeding with the installation, make sure you meet all the system requirements. 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 generate and access reports. The Desktop installation also installs the Report Scheduler.

System Requirements

- Pentium 133 PC or higher
- Microsoft Windows XP-SP2, 2000 and 2003
- A minimum of 128 MB of memory
- A minimum of 32 MB of hard disk space

■ **To install ReportSmith Desktop:**

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.

ReportSmith Enterprise Installation

The ReportSmith Enterprise installation is for a network environment where multiple users are using ReportSmith to generate and access reports. There are three types of installations:

- Report Server
- ReportSmith Client
- ReportSmith Web

Report Server System Requirements

- Pentium 300MHZ or higher
- Windows 2000 or 2003 server
- Minimum 256 MB of memory
- Minimum 32 MB of hard disk space

Server Installation

Before installing ReportSmith Enterprise, you must first designate a computer as the Report Server. The Report Server is where you install the Report Catalog, Report Scheduler and all User ID information.

■ To install the ReportSmith Enterprise Report Server:

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 the **Report Server Installation**, and then follow the instructions in the dialog boxes that appear.

Note: You must install the Report Server before you can perform any Client or Web Server 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. Also, any software needed to connect to a database must be installed and configured on the Report Server in order to schedule reports or open reports through ReportSmith web. If you create reports with graphs, Microsoft graph must be installed on the Report server in order to schedule reports or open reports through ReportSmith web.

Sharing the ReportSmith Folder

After installing ReportSmith, you must share the folder where ReportSmith is installed.

■ To share the folder where ReportSmith is installed:

1. Start Windows Explorer.
2. Locate the folder where ReportSmith is installed, and then right-click the folder. If the default location was used, this folder would have the following path: **c:\ReportSmith**.
3. From the right-click menu, select **Sharing** to display the **Properties** dialog box.
4. On the **Sharing** tab, select the **Share this folder** option.
5. In the **Share Name** box, type the name by which you want to share the folder, and then click **Apply**.
6. Click **OK** to close the dialog box.

ReportSmith Client Installation

The ReportSmith Client installation is a full installation that you install on each client workstation used to generate or run reports. ReportSmith stores reports in the Catalog found on the Report Server at the location specified during the ReportSmith Server installation. Reports that you have scheduled using the Client installation run on the Report Server. 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 Client installation, get the Universal Naming Convention (UNC) of the computer where the Report Server is installed. For more information, see your system administrator.

System Requirements for ReportSmith Client

- Pentium 133 PC or higher
- Windows 2000, 2003 or XP-SP2
- Minimum 128 MB of memory
- Minimum 32 MB of hard disk space

■ To install ReportSmith Enterprise Client:

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 **Client Installation** option, and then follow the instructions in the dialog boxes that appear.
3. When prompted for the location of the Report Server, do one of the following:
 - Enter the Universal Naming Convention (UNC) of the Report Server and the folder name shared during the Report Server installation in the following format:
\\UNC\sharedfolder
 - Click the **Browse** button to display the Map a Network drive dialog box. Select the drive letter you want to map, and then navigate to the location of the Report Server on the network.

ReportSmith Web Installation

ReportSmith Web allows you to run and schedule 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.

System Requirements for ReportSmith Web

- Windows 2000 or 2003 server
- Minimum of 256 MB of memory
- Minimum of 32 MB of hard disk space
- Internet Information Server (IIS) Version 4 or later

Browser Requirements

- Microsoft Internet Explorer 5.0 or later

ReportSmith Web 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:

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 the **WebServer Installation** 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 \\UNC\shared drive
5. When the installation is complete, you are prompted to restart your computer.

Configuring Internet Information Server

Before running reports through ReportSmith Web, the following change must be made to IIS:

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

Installing ReportSmith on a Windows 2003 Server

Before installing the Report Server on a Windows 2003 server, 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*.

Strategic Reporting Systems, Inc. may have patents and/or pending patent applications covering subject matter in this document. The furnishing of this document does not give you any license to these patents.

COPYRIGHT© 2009 Strategic Reporting Systems, Inc. All rights reserved. All Strategic Reporting names are trademarks of Strategic Reporting Systems, Inc. Other brand and product names are trademarks or registered trademarks of their respective holders.

Printed in the U.S.A.

