



Microsoft Dynamics™ GP  
**SQL Server Reporting Services Administrator's Guide**  
Release 10.0

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# Introduction

You can use Microsoft® SQL Server® Reporting Services to create and modify reports using data from Microsoft Dynamics™ GP. Reporting Services is a series of services, Web applications, and databases that work together. Use this manual to install and set up Reporting Services to use with Microsoft Dynamics GP reports.

This introduction is divided into the following sections:

- [What's in this manual](#)
- [Symbols and conventions](#)
- [Send us your documentation comments](#)



## What's in this manual

The SQL Server Reporting Services for Microsoft Dynamics GP Administration Guide is gives you an overview of Reporting Services and how to install and set up Reporting Services to use with Microsoft Dynamics GP report. The manual is divided into the following parts.

- [Part 1, Reporting Services basics](#), provides an overview of SQL Server Reporting Services for Microsoft Dynamics GP.
- [Part 2, SQL Server Reporting Services installation](#), describes the SQL Server Reporting Services components you use to configure and maintain SQL Server Reporting Services for Dynamics GP.

## Symbols and conventions

This documentation uses the following symbols and conventions to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks.

Convention	Description
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
File >> Print or <b>File &gt; Print</b>	The (>>) or (>) symbol indicates a sequence of actions, such as selecting items from a menu or toolbar, or pressing buttons in a window. This example directs you to go to the File menu and choose Print.
TAB or ENTER	Small capital letters indicate a key or a key sequence.

## Contacting Microsoft Dynamics GP Technical Support

If you have any questions regarding Reporting Services with Microsoft Dynamics GP, you can contact Microsoft Dynamics GP Technical Support using one of the following methods:

- Log on to the Microsoft Dynamics GP Support Web site (<https://mbs.microsoft.com/customersource/support/>) and choose New Support Request under Assisted Support to send an eSupport request.
- Telephone 1-888-477-7877 (U.S. and Canada only) or +1-701-281-0555, and use one of the following Quick Access Codes based on the database you are using:

System Manager - MSDE	6762
System Manager - Microsoft SQL	6731

## Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: [bizdoc@microsoft.com](mailto:bizdoc@microsoft.com).

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# Part 1: Reporting Services basics

This portion of the documentation provides an overview of Reporting Services, its tools, and deployment configurations. This part contains the following chapters.

- [Chapter 1, “Reporting Services overview.”](#) provides an overview of Reporting Services.
- [Chapter 2, “Reporting Services components.”](#) describes the main components of Reporting Services.
- [Chapter 3, “Security for Reporting Services.”](#) provides an overview of role-based security for Reporting Services.
- [Chapter 4, “Deployment configurations.”](#) provides a standard deployment and a scale-out deployment configuration for Reporting Services.

# Chapter 1: Reporting Services overview

Using data from Microsoft Dynamics GP, you can use Reporting Services to create and modify reports. Reporting Services is a series of services, Web applications, and databases that work together.

This chapter contains the following sections:

- [What is Reporting Services](#)
- [Creating reports](#)
- [Managing reports and other items](#)
- [Accessing and delivering reports](#)

## What is Reporting Services

Microsoft SQL Server 2005 Reporting Services (SSRS) is a SQL Server 2005 server-based reporting platform that allows reports to be viewed and managed over a World Wide Web-based connection. You can use Reporting Services to prepare, manage, and deploy reports that contain data from Microsoft Dynamics GP.

Reporting Services uses the following components:

- A complete set of tools that you can use to create, manage, and view reports.
- A Report Server component that hosts and processes reports in formats that include HTML, PDF, TIFF, Excel<sup>®</sup>, and CSV.
- An application programming interface (API) that allows developers to integrate or extend data and report processing in custom applications, or create custom tools to build and manage reports.

The reports that you build can be based on relational or multidimensional data from SQL Server, Analysis Services, Oracle, or any Microsoft.NET data provider such as ODBC or OLE DB. You can create tabular, matrix, and free-form reports. You can also create ad hoc reports that use predefined models and data sources. For more information about Reporting Services components, see [Chapter 2, "Reporting Services components."](#)

## Creating reports

You can use Report Designer or Report Builder to create a report. Your knowledge and report requirements determine which tool is most suitable.

### Report Designer

You can use Report Designer to create simple reports or complex reports that include expressions and custom assemblies. You can use the Report Wizard to create and modify a report, or build a report using a Report Server project template. You need know how to connect to a data source, build queries, and set properties to use Report Designer. Report Designer runs in Microsoft Business Intelligence Development Studio.

## Report Builder

You can use Report Builder to create basic reports without learning about databases and writing queries. You can create reports by dragging and dropping data fields, by using predefined report models and templates to manage data connections, querying, and data relationships.

You can create reports on the report server or on a client computer. After creating your reports, you can publish them to a report server to make the report available for other users.

## Managing reports and other items

By using Reporting Services, you can manage reports and items, such as folders and data source connections, from one location. You can define security, set properties, and schedule operations for your reports and items. You also can create schedules and data sources that can be shared for general use. To manage reports, you can use SQL Server Management Studio or Report Manager. The following tasks are examples of report management tasks.

- Adding new folders to store collections of reports.
- Using My Reports, report history, and e-mail report delivery.
- Securing access to folders and reports by assigning users and groups to roles.
- Building shared schedules and shared data sources that you want to make available for general use.

Users can publish and manage reports in My Reports. (My Reports is a folder for users to manage and work with reports.) Report server administrators can manage the entire report server folder namespace. The tasks that can be performed depend on user permissions.

## Accessing and delivering reports

You can access and deliver reports on demand or by subscription. If you use on demand delivery, users can select the reports from Report Manager, a Microsoft SharePoint® Web part, or a browser. By using subscriptions, reports are automatically generated and delivered as e-mails or to file shares. For more information about setting up subscriptions, refer to SQL Server Books Online.

To view a report on demand, you can search for or select a report from the report server folder namespace. To receive reports automatically, you can subscribe to a specific report. When the report runs, you are either notified that the report is available, or you receive a copy of the report through e-mail.

Report server administrators can build subscriptions that push reports to a large group of users. These subscriptions are called data driven subscriptions or mass mailings. Data-driven subscriptions generate a recipient list at time the report is run. In a data-driven subscription, delivery settings are built from stored data (such as data in an employee database) when the subscription is triggered.

Reports initially display in HTML format, but after a report is rendered you can redisplay the report in a different format such as Excel or PDF.

## Chapter 2: Reporting Services components

Reporting services is a series of services, web applications, and databases that work together. You can use the tools and services of Reporting Services to manage your reports.

This chapter includes information about the following components:

- [\*Report Server\*](#)
- [\*Report Manager\*](#)
- [\*Report Builder\*](#)
- [\*Report Designer\*](#)

### Report Server

The main component of Reporting Services is the report server. The report server is a Microsoft Windows® service and uses Web services to make its functionality available. The report server processes and delivers report information. The Web service shows a set of interfaces that client applications can use to access report servers. The Windows service provides initialization, scheduling and delivery services, and server maintenance. The services work together and make up a single report server instance.

Through its subcomponents, the report server processes report requests and makes reports available on demand or scheduled distribution. Report server subcomponents include processors and extensions. Processors are the hub of the report server. The processors support the integrity of the reporting system and cannot be modified or extended. Extensions are also processors, but they perform very specific functions. Reporting Services includes one or more default extensions for every type of extension that is supported.

### Report Manager

Report Manager is a Web-based report access and management tool that you access through Microsoft Internet Explorer®. You can use Report Manager to administer a single report server instance from a remote location over a Hypertext Transfer Protocol (HTTP) connection. You also can use Report Manager for navigating folders and for its report viewer. You can use Report Manager to perform the following tasks:

- View, search, and subscribe to reports.
- Create, secure, and maintain the folder hierarchy to organize items on the server.
- Configure site properties and default settings. You also can determine the availability of My Reports to support publishing and creating reports in a personal workspace.
- Configure role-based security that determines access to items and operations.
- Configure report execution properties, report history, and report parameters.

- Create report models that connect to and retrieve data from a Microsoft SQL Server Analysis Services data source or from a SQL Server relational data source.
- Create shared schedules and shared data sources to make schedules and data source connections more manageable.
- Create data-driven subscriptions that roll out reports to a large recipient list.
- Create linked reports to reuse and repurpose an existing report in different ways.
- Launch Report Builder, a report design tool used for creating and modifying model-driven, ad hoc reports.

## Report Builder

Report Builder is a report authoring tool used to create ad hoc reports. By using Report Builder, you can create basic reports without learning about databases and writing queries. You can create reports by dragging and dropping data fields by using predefined report models and templates to manage data connections, querying, and data relationships.

### Build reports

You can use a report layout template to build a table, matrix, or chart report. Filters can be applied to the report to refine which data gets displayed. The report model contains all of the information required for Report Builder to automatically generate a query to retrieve the requested data. Using Report Builder, you can find data that is related to the content in the report, add text and formatting, create new fields and calculations based on the data in the report model, and preview, print, and publish the report.

### Explore data

Using Report Builder, users can explore the related data within the report model. Clickthrough reports are automatically generated so that report viewers can follow the report model's navigation paths to explore the data. They can continue clicking through the data as long as there is a relationship to follow from the current item. When clicking through the data, queries are generated automatically by passing information about which data that the user is using to create their report, typically referred to as the context of the current data location.

### Utilize Reporting Services features

Report Builder is an application that is accessed from the report server for easy centralized management. Report Builder reports are published using Report Definition Language (RDL). Because Report Builder reports are saved as RDL, they can be opened and modified using Report Designer. Report Builder reports are managed, secured, and delivered using the same methods and APIs used to manage, secure, and deliver Report Designer reports.

Report Builder can be accessed through a URL or from Report Manager. Users need assigned permission to access Report Builder. In the role-based security model implemented for Reporting Services, users who are assigned to the Content Manager role can create and edit reports in Report Builder. Local administrators are automatically assigned to this role. If you want other users to be able to work with a Report Builder report, you must create a role assignment for them that includes the

default role “Report Builder.” You also can create a custom role definition. As long as the customized role includes the “Consume reports” task, users who are assigned to that role will have sufficient permission to create and modify reports using Report Builder. For more information about security, see [Chapter 3, “Security for Reporting Services.”](#)

## Report Designer

Report Designer is a collection of design surfaces and graphical tools that are hosted within the Microsoft Visual Studio® environment. Report Designer provides tabbed windows for Data, Layout, and Preview that allow you to design a report. You can add datasets to accommodate a new report design idea, or adjust report layout based on preview results. In addition to the Data, Layout, and Preview design surfaces, Report Designer provides query builders, an Expression editor, and wizards to help you place images or step you through the process of creating a simple report.

### Design reports

You can use Report Designer to create simple reports or complex reports that include expressions and custom assemblies. You can use the Report Wizard to create and modify a report, or build a report using a Report Server project template. You need know how to connect to a data source, build queries, and set properties to use Report Designer. Report Designer runs in Microsoft Business Intelligence Development Studio. To use Report Designer, select a Report Server Project or Report Server Project Wizard template and the designer opens.

Report Designer supports tabular, matrix, or freeform reports. Tabular reports and matrix reports are created using the Report Wizard. Freeform reports, which can include tables, matrices, and charts, are created using the Visual Studio interface.

Reports are based on report definition (.rdl) files that you create in Report Designer. All of the features that you can add to a report are described by RDL.

### Preview the layout

While designing a report, you have the option of testing it locally before publishing it to a report server. When you preview a report, Report Designer can use the same processing and rendering extensions that the report server uses, ensuring that users see the report as it was intended when they run the report. When ready, use Report Designer to publish reports to a report server.

### Publish to a server

Publishing a report copies it from the report definition on your hard drive to the report server database. Once a report is published to a report server, it can be managed and secured independently from the report definition file that you work with in Visual Studio.

To publish a report, you can use the build and deploy commands available through Visual Studio. To administer reports after publication, use SQL Server Management Studio or Report Manager. For more information about Report Manager and SQL Server Management Studio, see SQL Server Books Online.





## Chapter 3: Security for Reporting Services

SQL Server 2005 Reporting Services uses role-based authorization and Windows authentication to determine who can perform operations and access items on a report server. Role-based authorization categorizes the set of actions that a user or group can perform into roles.



*The information in this chapter assume you are using Windows authentication to establish the identity of all users who access a report server.*

This chapter contains the following sections.

- [Role-based security overview](#)
- [Securable items](#)
- [Role assignments](#)
- [Role definition](#)
- [Permissions and tasks](#)
- [Minimum security and access permissions for local administrators](#)
- [Using default security](#)

### Role-based security overview

All users interact with a report server within the context of a role. A user can be assigned to different kinds of roles for different items. Predefined roles are provided that arrange related tasks into logical groups. You can create new roles or modify the existing ones to customize the tasks that each role supports.

Through role-based security, Reporting Services provides an authorization model, but it does not include an authentication component. For authorization to work, the underlying network security must be able to authenticate the users and groups who access the report server.

Authentication is provided through security extensions that are part of a report server. The default security extension uses Windows authentication, but you can create a custom authentication extension if you want to support user logons through forms authentication or some other authentication solution.

On a report server, authentication through the default Windows security extension is performed by Internet Information Services (IIS). The user and group accounts that you specify in role assignments are created and managed through Active Directory®. Only valid accounts can be specified. A report server verifies the validity of user and group accounts periodically. Role assignments that specify accounts that are no longer defined in Active Directory are removed. This action is logged as an information message in the application log file.

Reporting Services is installed with a single role assignment that grants report server access to members of the local administrators group. A local administrator must create additional role assignments to make the report server accessible to other user and group accounts. To define roles and role assignments, use Report Manager or SQL Server Management Studio.

### Securable items

A securable item is any item stored and managed by a report server that can be secured independently of other items. Schedules and subscriptions operate within

the security of a report. Security is inherited within the report server folder hierarchy. You can override inherited security by defining security for individual items.

The following table lists securable items and describes their characteristics.

Item	Characteristics
Folders	Folder security applies to the folder itself and the items it contains. The security that you set for the Home folder establishes the initial security settings for all subordinate folders, reports, resources, and shared data sources in the folder hierarchy. My Reports is secured through an implied role assignment based on a dedicated role.
Reports	Reports and linked reports can be secured to control the range of actions that users can perform, such as changing the properties of a given report. Report history is secured through the report that contains the history. You cannot secure individual snapshots within report history. Report security is not affected by the execution options you set for the report. For example, you secure a cached report in the same way you secure a snapshot.
Report models	You can specify role assignment on all or part of a report model. Because report models can be quite extensive, you might want to secure the model items that map to confidential data.
Resources	Resources can be secured to control access to the resource itself and its properties. Only stand-alone resources can be secured as separate items. Resources that are embedded within a report cannot be secured separately from that report.
Shared data sources	Shared data sources can be secured to limit access to the item and its property pages.

## Role assignments

In Reporting Services, role assignments determine access to stored items and to the report server itself. A role assignment has the following parts:

- A securable item for which you want to control access. Examples of securable items are folders, reports, and resources.
- A user or group account that can be authenticated by Windows security or another authentication mechanism.
- Role definitions that define a set of tasks. Examples of role definitions are System Administrator, Content Manager, and Publisher.

Role assignments are inherited within the folder hierarchy. The role assignment that is defined for a folder is automatically inherited by all reports, shared data sources, resources, and subfolders contained within that folder. You can override inherited security by defining role assignments for individual items. All parts of the folder hierarchy must be secured by at least one role assignment. You cannot create an unsecured item or use settings that makes an item unsecured.

## System-level and item-level role assignments

There are item-level role assignments and system role assignments in Reporting Services. Item-level role assignments control access to reports, folders, report models, shared data sources, and resources in the report server folder hierarchy. Item-level role assignments are defined when creating a role assignment on a specific item or on the Home folder.

System role assignments authorize operations that are scoped to the server as a whole (for example, the ability to manage jobs is a system level operation). A system role assignment is not the equivalent of a system administrator. It does not give advanced permissions that grant full control of a report server.

A system role assignment does not authorize access to items in the folder hierarchy. System and item security are mutually exclusive. For any given user or group, you might need to create both a system-level and item-level role assignment to provide sufficient access to a report server.

## Users and groups in role assignments

The users or group accounts that you specify in role assignments are domain accounts. The report server references, but does not create or manage, users and groups from a Microsoft Windows domain (or another security model if you are using a custom security extension). The authentication process is handled by IIS.

Of all the role assignments that apply to any given item, no two can specify the same user or group. If a user account is also a member of a group account, and you have role assignments for both, the combined set of tasks for both role assignments are available to the user.

When you add a user to a group that is already part of a role assignment, you must reset IIS for the new role assignment to take effect for that user.

## Predefined role assignments

By default, predefined role assignments are implemented that allow local administrators to manage the report server. You must add additional role assignments to grant access to other users.

For more information about the predefined role assignments that provide default security, see [Predefined roles overview](#) on page 18.

## Role definition

There are a fixed set of tasks that describe all possible operations that can be performed on a report server. A role definition is a named collection of tasks that define the operations a user can perform on a report server. It provides the rules used by the report server to enforce security. When a user attempts to perform an operation, such as publishing a report to a folder, the report server first evaluates the item's role assignment to determine the user's role and which tasks are allowed. If the task is included in the role definition, the request is submitted.

To create or modify a role, you add to or remove tasks from the role definition. Item-level tasks can be combined to create role definitions that are used for working with items, such as reports or folders. System-level tasks can be combined into role definitions that are used for management of the report server site. Roles can include item-level tasks or system-level tasks, but not both. A role becomes operative only when it is used in a role assignment.

Reporting Services includes predefined roles that are commonly found in organizations. These roles can be modified or renamed. There are several management-level roles. There is also a Browser role for users who only view reports. For more information, see [Predefined roles overview](#) on page 18.

## Permissions and tasks

Tasks are actions that a user or administrator can perform in Reporting Services. Tasks are predefined. You cannot create custom tasks or modify the ones provided. These tasks comprise the entire set of operations that are available in role-based security. Some examples of tasks include “View reports,” “Manage reports,” and “Manage report server properties.”

Each task consists of a set of permissions, which are also predefined. For example, the “Manage folders” task contains permissions to create and delete folders and view and update folder properties. Permissions for each task are documented to provide a more exact description of each task. It is not possible to interact with permissions directly or to specify them in role assignments. Users are granted permissions indirectly through the tasks that are included in role definitions.

Tasks can be performed only if they are part of a role and that role is included in a role assignment. If the View Models task is not included in a role, or that role is not included in a role assignment, users cannot view report models.

### System and item level tasks

There are system level tasks and item level tasks. A role can include tasks only from a single category. The following table describes each type of task.

Type	Description
Item-Level Tasks	Actions that are performed on items managed by a report server, such as folders, reports, report models, and resources. Item-level tasks are scoped to the report server folder namespace. All items that you access through the folders on a report server or through URL access are secured by role assignments that include item-level tasks.
System-Level Tasks	Actions that are performed at the system level, such as managing jobs or shared schedules that can be used with many items. System-level tasks are scoped outside of the report server folder namespace.

## Minimum security and access permissions for local administrators

Although you can modify the default and custom role assignments, you cannot remove all role assignments, leaving the report server unsecured. At minimum, each report server must have one system role assignment that defines access at the system level, and one item-level role assignment that defines access to the folder hierarchy.

Members of the local Administrators group can always access a report server to change site settings no matter what role assignments are set. If you accidentally set role assignments in such a way that all users are locked out, a local administrator can always reset security.

All local administrators get read permission on all items stored in the report server database, plus read and write permissions on security settings. This way local

administrators always have permission to add, delete, and modify the role assignments that are set at the system and item level. Local administrators also are granted elevated permissions on a permanent basis. Adding, modifying, and deleting role assignments has no effect on permissions that are granted to members of the local Administrators group.

Having access to a report server is not the same as having full access to all the reports and the data it contains. To ensure that users with elevated permissions like local administrators cannot access confidential reports, you must secure the reports at the data-access level, requiring users to provide credentials to view the report.

## Using default security

Reporting Services installs with default security that is configured during setup. Default security is provided through role assignments that match the built-in local administrators Windows group with predefined report server roles. The predefined roles describe supported operations on the report server folder hierarchy as well as the system as a whole. Because built-in groups cannot be deleted, each report server is installed with the default role assignments in effect.

### Default role assignments for administrators

Reporting Services provides default security through role assignments that are configured during setup. These role assignments define access for local administrators. The preset role assignments consist of built-in Windows accounts, roles, and a security context.

The following table shows the predefined role assignments.

Built-in group	Role	Securable item
Administrators	System Administrator Role	System
Administrators	Content Manager Role	Folder hierarchy starting at the Home folder (the root node)

Notice that two role assignments are necessary to provide wide-ranging access to a report server. System-level role assignments support operations that apply to the report server site as a whole. Item-level role assignments provide access to the folder hierarchy. These two security zones are mutually exclusive.

### Extending access to other users

To open a report server to other users, you must create additional role assignments. One option to consider is using built-in accounts such as Everyone (an Internet Information Services account) or Users (a global domain account), and then assign those accounts to roles that provide read-only access to a report server.

The following table shows a combination of roles that you can define if you want to provide limited access to a large group of users right away.

Built-in group	Role	Securable item
Everyone	System User Role	System
Everyone	Browser Role	Folder hierarchy starting at the Home folder (the root node)



*The built-in Everyone and Users groups include all user accounts that have access to your Web server or that are defined in your domain. If you do not want to provide view-only access to this many users, you should choose different accounts.*

When you define role assignments for report users, you should define one for the system and one for the folder hierarchy.

### **Predefined roles overview**

Reporting Services includes a small set of predefined roles that you can use in role assignments. Each role is defined by the tasks that it supports. You can modify these roles or replace them with custom roles.

The following table describes the predefined roles.

<b>Predefined role</b>	<b>Description</b>
Browser Role	Run reports and navigate through the folder structure.
Content Manager Role	Define a folder structure for storing reports and other items, set security at the item level, and view and manage the items stored by the server.
Report Builder Role	Build and edit reports in Report Builder.
Publisher Role	Publish content to a report server.
My Reports Role	Build reports for personal use or store reports in a user-owned folder.
System Administrator Role	Enable features and set defaults, set site-wide security, create role definitions, and manage jobs.
System User Role	View basic information about the report server such as the schedule information in a shared schedule.

## Chapter 4: Deployment configurations

There are several ways the Reporting Services can be deployed. You can use a standard deployment model or a scale-out deployment model.

You must use Kerberos Authentication with Reporting Services if you are using Windows Authentication and your configuration has SQL Server on one computer and the Web server on another computer. For more information see How to use Kerberos authentication in SQL Server (<http://support.microsoft.com/kb/319723/en-us>).

This chapter includes the following sections.

- [Standard deployment model](#)
- [Scale-out deployment model](#)

### Standard deployment model

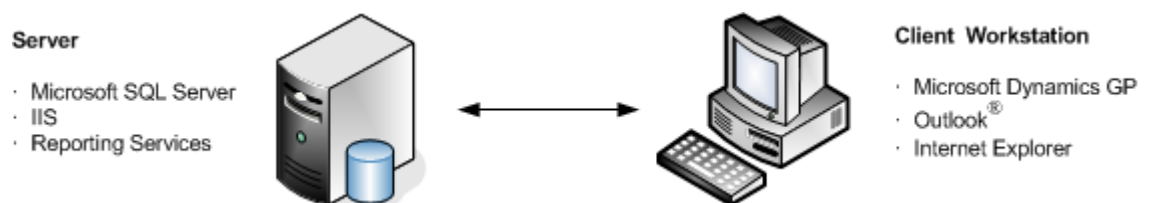
A standard deployment model is made up of a single report server instance that uses a local or remote SQL Server database engine to host the report server database.

You should consider processing resource and disk space availability when choosing where to host the report server database are processing resources and disk space availability. Both the report server and the database engine compete for CPU time, memory, and disk access. Some report server operations are resource intensive. For example, a report server attempts to use all available memory for report rendering operations.

Although the use of a report server database may be small initially, disk space requirements can grow significantly at run time depending on how you run reports and the number of users accessing the report server.

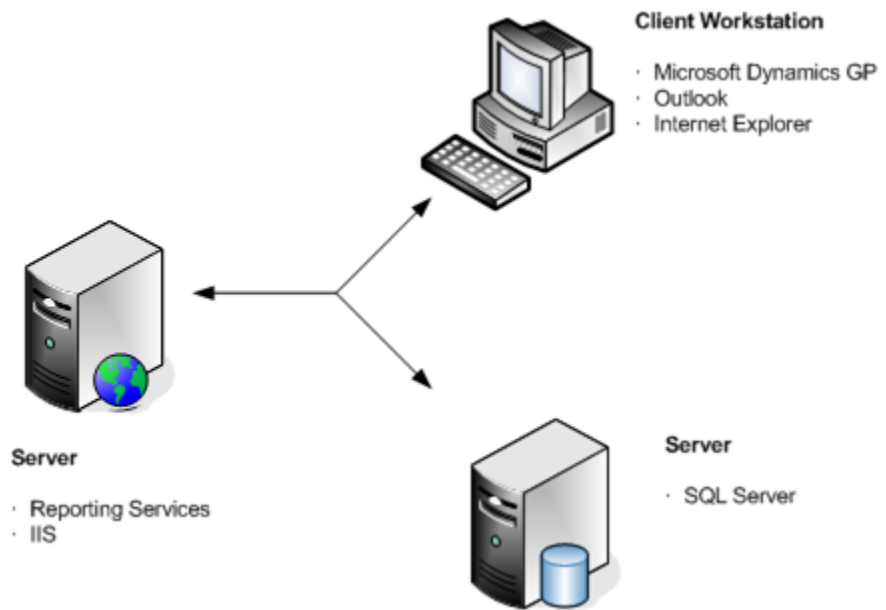
### Single-server configuration

The following diagram shows the standard deployment model of single-server configuration. A single-server configuration is where the report server database is installed locally so that all server components are on the same computer.



## Separate server configuration

The following diagram shows the standard deployment model where the report server database is located on a remote server.



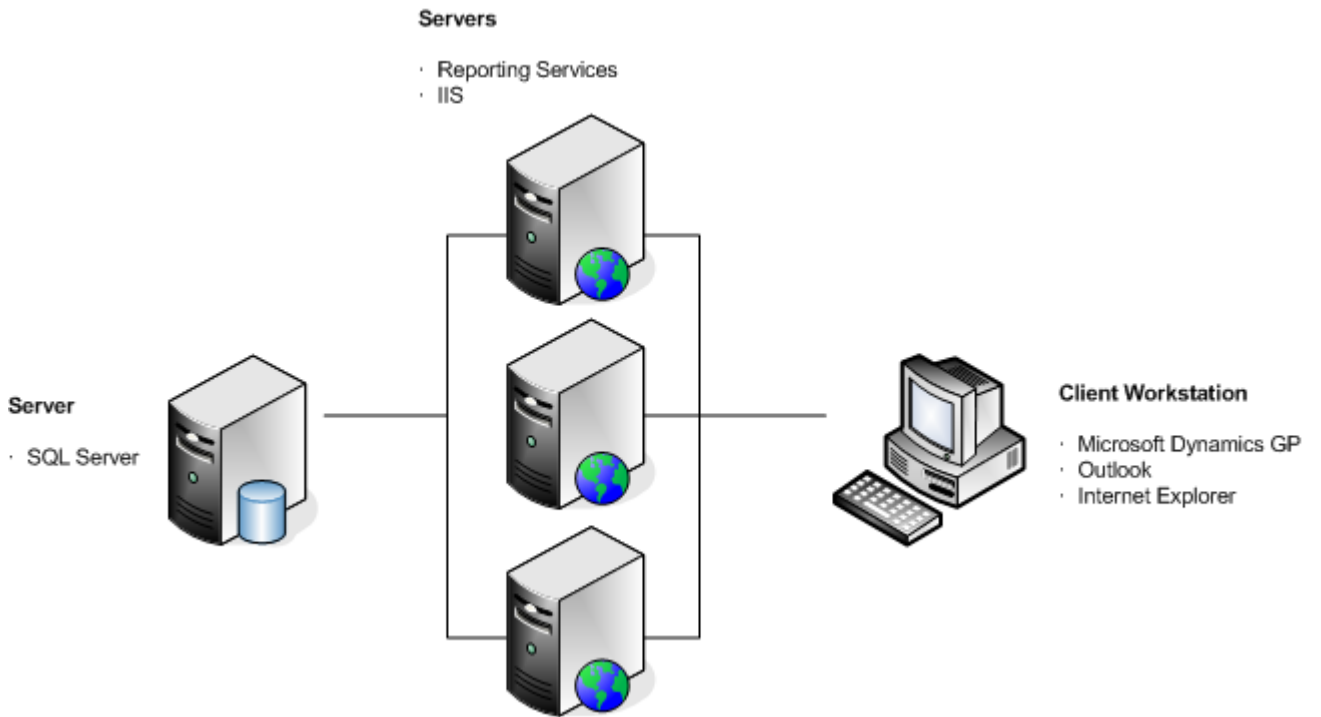
## Scale-out deployment model

You can deploy Reporting Services in a scale-out deployment. A report server scale-out deployment model is made up of multiple report servers that share a single report server database. You can run the report servers in a server cluster. The database can be installed on a remote SQL Server instance or locally with one of the report servers.

To run the report servers as a single virtual server or to use Network Load Balancing (NLB), you must use software and tools that support that functionality. Reporting Services does not provide server cluster or virtual server management.



The following diagram shows multiple report servers and report server databases deployed in separate server clusters.







# Part 2: SQL Server Reporting Services installation

This portion of the documentation describes how to install Reporting Services, and how you can deploy predefined reports that are included in Microsoft Dynamics GP to a server, and how to set up security for reports.

- [Chapter 5, “Installing Reporting Services.”](#) provides instructions for installing and configuring Reporting Services.
- [Chapter 6, “Deploying Reporting Services reports.”](#) describes how to deploy reports for Microsoft Dynamics GP.
- [Chapter 7, “Reporting Services Security Setup.”](#) provides instructions for granting access to reports.

# Chapter 5: Installing Reporting Services

Use the information in this chapter to install and configure Reporting Services. This chapter contains the following sections:

- [Prerequisites](#)
- [Configuring IIS](#)
- [Installing Reporting Services](#)
- [Configuring Reporting Services](#)
- [Starting Report Manager](#)

## Prerequisites

The following components must be installed before you can install SQL Server Reporting Services to use with Microsoft Dynamics GP.

Item	Requirements
Operating system	<b>Server</b> Windows Server <sup>®</sup> 2003 with latest service pack <b>Client</b> Windows XP with latest service pack Windows Vista <sup>®</sup> with latest service pack
Database	Microsoft SQL Server 2005 with service pack 2
Web server and Web browser	Internet Information Services (IIS) 6.0 Internet Explorer 7 or Internet Explorer 6 with service pack 2
Microsoft Dynamics GP	Release 10.0 with Service Pack 1 or later

## Configuring IIS

Internet Information Services (IIS) must be installed before Reporting Services because a Web site and a Web services are created during the Reporting Services installation. IIS is a set of Internet-based services for servers using Microsoft Windows. IIS hosts Web sites and Web services.

### To configure IIS for Windows Server 2003:

1. Open the Add or Remove Programs control panel.  
(Start >> Control Panel >> Add or Remove Programs)
2. Click Add/Remove Windows Components to open the Windows Components Wizard.
3. Mark Applications Server in the Components list and click the Details button.
4. Mark the following Application Server subcomponents.
  - ASP.Net
  - Enable network COM + access
  - Enable network DTC access
  - Internet Information Services (IIS)
5. Select Internet Information Services (IIS) and click the Details button.

6. Mark the following Internet Information Services (IIS) subcomponents.
  - Common Files
  - Internet Information Services Manager
7. Click OK.

The additional components are installed. You may be asked to insert the Windows Server 2003 product CD to continue the installation.

## Installing Reporting Services

You can follow the instructions in this section if you have not yet installed Microsoft SQL Server Reporting Services. This procedure assumes that you have already installed Microsoft SQL Server 2005, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration. A single-server configuration is where the report server database is installed locally so that all server components are on the same computer. For more information about configurations, see [Chapter 4, "Deployment configurations."](#)

When running the SQL Server installation program, you must be logged in as a member of the local system administrators group. Your SQL Server login account must have administrator permissions in SQL Server so you can create logins, roles and databases, and assign roles to logins.

### To install Reporting Services:

1. Insert the SQL Server 2005 DVD. The main SQL Server installation screen should appear. If you do not see this screen, browse the DVD and double-click the Splash.hta file.
2. Click Run in the SQL Server Installation Wizard.
3. Mark the option to accept the terms of the End-User License Agreement, and then click Next.
4. In the Installing Prerequisites window, click Next after the components that are required are installed.
5. In the Welcome to the Microsoft SQL Server Installation Wizard window, click Next.
6. Your computer is scanned for conditions that may cause possible installation problems. To proceed with the installation, click Next in the System Configuration Check window.



*If the IIS Feature Requirement has an error or warning, you must be sure that IIS is configured correctly.*

7. Accept the entries in the Name and Company fields in the Registration Information window, and click Next.
8. In the Components to Install window, select the Reporting Services, and click Next.

9. In the Instance Name window, select a default or named instance for your installation.
  - Select Default instance to install Reporting Services on your default instance of SQL server, and click Next.
  - Select Named Instance and enter the instance name to install Reporting Services to another instance of SQL server, and click Next.
10. In the Services Accounts window, select Use the built-in system account option. Click Next.
11. In the Report Server Installation Options window, click Next.
12. The Setup Progress window appears, allowing you to view the status of the installation. Click Next after the installation is completed.
13. In the Completing the Microsoft SQL Server Installation Wizard window, click Finish to exit the installation wizard.
14. Restart the computer if you are instructed to do so.
15. Apply Microsoft SQL Server 2005 service pack 2 before you configure SQL Server Reporting Services.

## Configuring Reporting Services

After installing Reporting Services, use the Report Server Configuration Manager to configure and start Reporting Services. The Report Server Configuration Manager has a number of pages that you can use to configure Reporting Services.

Each page name is shown in the page menu. If the icon next to the page name is green with a check mark, the items on the page are configured correctly. If the icon has an X, the items aren't configured correctly.

### To configure Reporting Services:

1. Start Report Server Configuration Manager.  
(Start >> All Programs >> Microsoft SQL Server 2005 >> Configuration Tools >> Reporting Services Configuration)
2. Enter the name of a server and select an instance to connect to in the Report Server Installation Instance Selection window. Click Connect.



*If you installed Reporting Services on a Web server where SQL Server isn't installed, connect to the reporting server and not the SQL server.*

3. If Reporting Services isn't running, click the Start button in the Report Server Status page. The Report Server Status page displays status information about the instance that you've selected.
4. In the navigation pane, click Report Server Virtual Directory to open the Report Server Virtual Directory Setting page. This page allows you to view and change the name of the virtual directory used by the Reporting Services Web service.
5. Click New to create a new virtual directory.

6. In the Create a New Virtual Directory window, select the Web site where to create the virtual directory, and click OK.
7. In the navigation pane, click Report Manager Virtual Directory to open the Report Manager Virtual Directory Setting page.
8. Click New to create a new reports virtual directory.
9. In the Create a New Virtual Directory window, select the Web site where to create the virtual directory, and click OK.
10. In the navigation pane, click Windows Service Identity to open the Windows Service Identity page. Verify that the service account is using the local system account.
11. In the navigation pane, click Web Service Identity to open the Web Service Identity page. Click Apply.
12. In the navigation pane, click Database Setup to open the Database Connection page.
13. Enter the server name, and click Connect.
14. The SQL Server Connection Dialog window opens, where you can specify the credentials to be used to connect to the SQL server. Since the local system account is used to access the SQL server, click OK without changing the default options.
15. If the SQL server name appears as the Server Name field in the Database Connection page, the connection to the server has been successful.
16. Click New to open the SQL Server Connection Dialog window. Click OK to create the database at the SQL server.
17. Click Apply in the Database Connection page to apply all the changes to the SQL server and Reporting Services configuration.

## Starting Report Manager

Report Manager is installed during setup on the same computer as the report server. You should verify that you can connect to the Report Manager.

### To start Report Manager:

1. Open Microsoft Internet Explorer 6.0 or later.
2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is `http://<ComputerName>/reports`.



## Chapter 6: Deploying Reporting Services reports

This chapter explains how to install and use a wizard that is used to deploy Reporting Services reports in the Microsoft Dynamics GP. You can use the Reporting Tools Setup window to list the Reporting Services reports that you've deployed in the Microsoft Dynamics GP report list.

This chapter includes the following sections.

- [\*Installing the SQL Server Reporting Services Wizard\*](#)
- [\*Deploying predefined Reporting Services reports for Microsoft Dynamics GP\*](#)
- [\*Listing SQL Server Reporting Services reports in the report list\*](#)

### Installing the SQL Server Reporting Services Wizard

Use this procedure to install a wizard on the server that is used to deploy Reporting Services reports.

#### To install an SQL Server Reporting Services Wizard:

1. Start the installation wizard. You can use either of the following methods.
  - Insert the Microsoft Dynamics GP CD2. The main Microsoft Dynamics GP installation window should appear. If the window does not appear, browse the CD and double-click the Setup.exe file.

—or—

  - Download and extract the GP\_10\_SRSInstall.zip file, then double-click the Setup.exe. See Microsoft Dynamics GP 10.0 Microsoft SQL Server Reporting Services Reports ([https://mbs.microsoft.com/customersource/downloads/servicepacks/msdgp10\\_srsdownload.htm?printpage=false](https://mbs.microsoft.com/customersource/downloads/servicepacks/msdgp10_srsdownload.htm?printpage=false)) for the latest hotfix.
2. Click SQL Server Reporting Services Wizard, and then click Install.
3. Click Next in the Welcome window.
4. Mark the option to accept the terms of the End-User License Agreement, and then click Next.
5. In the Select Features window, select the features to install.
6. Specify the folder where you want the Microsoft SQL Server Reporting Services Wizard installed. The default folder is C:\Program Files\Microsoft Dynamics\SQL Reporting. To select a different folder, click Browse  
  
After you have specified the installation folder, click Next.
7. In the Install Program window, click Install.
8. The Installation Progress window appears, where you can view the status of the installation.
9. In the Installation Complete window, click Exit.

## Deploying predefined Reporting Services reports for Microsoft Dynamics GP

Use the Microsoft SQL Server Reporting Services Wizard in Microsoft Dynamics GP to deploy the predefined SQL Server Reporting Services reports that are available in Microsoft Dynamics GP to the SQL Server Reporting Services server. The wizard allows you to connect to the server, select the database and modules to deploy Reporting Services reports for, and define the location to deploy the reports to. You can use this wizard to deploy reports to more than one company.

### To deploy predefined Reporting Services reports for Microsoft Dynamics GP:

1. On the computer where Reporting Services is installed, open the Microsoft SQL Server Reporting Services Wizard.  
(Start >> All Programs >> Microsoft Dynamics >> Business Intelligence >> SQL Server Reporting Services Wizard)



*If you are using Windows Vista, you must run as an administrator when starting the Microsoft SQL Server Reporting Services Wizard.*

2. Click Next in the Welcome window.
3. Enter the Microsoft Dynamics GP server name, user name, and password that you use to log on to SQL Server with. Click Next.
4. Select the database and modules to deploy reports for. Click Next.
5. Enter the URL of the report server that you want to deploy reports to.
6. Click Finish.
7. In the Deployment Complete window, close the wizard or select to deploy the reports to another company.

### Listing SQL Server Reporting Services reports in the report list

Use the Reporting Tools Setup window to list the SQL Server Reporting Services reports that you've deployed in the Microsoft Dynamics GP report list.

#### To list SQL Server Reporting Services reports in the report list:

1. In Microsoft Dynamics GP, open the Reporting Tools Setup window.  
(Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Reporting Tools Setup)
2. On the SQL Reporting Services tab, enter the location to the SQL Server Reporting Services Report Server.

For example: `http://localhost/ReportServer/ReportService.asmx`

—or—

`http://IISServername/reports/Pages/Folder.aspx`

3. Enter the URL for the SQL Server Reporting Services Report Manager.

For example: <http://localhost/ReportServer/ReportService.aspx>

—or—

<http://IISservername/reports/Pages/Folder.aspx>

4. Click OK to save your changes and close the window. SQL Server Reporting Services reports are now displayed in the Custom Reports list if you've already deployed SQL Server Reporting Services reports.



# Chapter 7: Reporting Services Security Setup

After the installation and configuration of Reporting Services and deploying the Microsoft Dynamics GP SQL Server Reporting Services reports, the only individuals who will be able to access or view the reports within the Report Manager are those users who are members of the Web server's local administrator group and local administrators on SQL Server. The Web site administrator has to implement and grant access to the Reporting Services Web site and database objects required to print reports.

This chapter has the following sections.

- [Designing Reporting Services security](#)
- [Granting access to the Reporting Services Web site](#)
- [Database security setup](#)

## Designing Reporting Services security

Before you implementing security for Reporting Services, determine your security requirements. You should identify the following information.

- Which users have access to which companies
- Which users should have access to which series of reports
- Which users should or should not have access to an individual report

The default security setup is to use your Windows credentials through to the database level. The process is the same as granting access to files and folders at the Windows level. You'll use groups or individual domain users when granting access. For the domain users or groups to have access and see the reports within the Report Manager, they must be granted permission at the Web site.

## Granting access to the Reporting Services Web site

To get the domain users to view and have access the reports within the Report Manager, they must be granted permission at the Web site using SQL Server Management Studio or the Report Manager.

### To grant access from the Report Manager

1. Open Report Manager by entering the Report Manager URL in the address bar of the Web browser. The default URL is `http://<ComputerName>/reports`.



*If Site Settings is not available, you do not have permission to access site settings.*

2. In the Security section, click Configure site-wide security.
3. To enable access for a new user or group, click New Role Assignment.
4. Enter the name of the user or group account.
5. Select one or more system role definitions to use with this assignment.
6. Click OK.
7. Click Home to open the Home page.

8. Click the Properties.
9. Click New Role Assignment to open the New Role Assignment page.
10. Enter the name of the user or group account.
11. Select select one or more roles until the combined set of tasks describe the actions that the user should be allowed to perform. To view the set of tasks that each role supports, click the role name.

**To grant access from the SQL Server Management Studio:**

1. Open SQL Server Management Studio.  
(Start >> Programs >> Microsoft SQL Server 2005 >> SQL Server Management Studio)
2. Select Reporting Services as the server type, enter the name of server, and click Connect.
3. Right-click the server name, and select Properties.
4. The Server Properties – <Server Name> window opens. Click Permissions. The default access is to the local machine’s BUILTIN\Administrators group. Members of this group will have access to all reports.
5. Click the Add Group or User button.
6. In the Add Group or User window, enter the name of the group or user to give access to, and click OK.
7. The new group or user appears in the Server Properties – <Server Name> window.
8. Mark the appropriate role access to the report server site.  
  
If you mark System Administrators, users in the group can enable features and set defaults, set site-wide security, create role definitions, and manage jobs.  
  
If you mark System User box, users in the group can execute reports, view report server properties, and share report schedules.
9. Click OK.
10. To grant access Report Manager’s Home folder, right-click Home and select Properties.
11. The Folder Properties window opens. Click Permissions.
12. Click the Add Group or User button.
13. In the Add Group or User window, enter the name of the group or user, and click OK.
14. The new group or user appears in the Folder Properties window.

15. Mark the appropriate item-level roles that each group or user account can assume relative to the item. For more information about these roles, see [Predefined roles overview](#) on page 18.
16. Click OK.

## Database security setup

You need to grant group or user access to SQL Server and the appropriate databases to allow a user to run Report Services reports. Use the following procedure to create a new SQL Server login for the group or user and assign the appropriate database roles to the login for access to Report Services reports. To review what reports require what database roles, download MDGP10\_SRSReports\_Roles (<https://mbs.microsoft.com/fileexchange/?fileID=80628e60-729d-4e47-bbd5-37af74ea39c7>). (CustomerSource login required.)

Before creating new SQL Server logins, you should carefully plan the accounts and the type of accounts to be created. You need to decide whether or not to add the individual Windows accounts or to use local or domain groups for access. You should consider access to the Report Services reports and the local folders being created on the Web server as well.

### To add a Windows domain users or groups in SQL Server:

1. Open SQL Server Management Studio.  
(Start >> Programs >> Microsoft SQL Server 2005 >> SQL Server Management Studio)
2. Select Database Engine, enter the name of server, enter authentication information, then and click Connect.
3. Expand the Security folder.
4. Right-click the Logins folder, and select New Login.
5. In the Login – New window, enter the user or group that you want to have access to the SQL Server. If you don't know the login name, you can click the Search button and look for the name.
6. Click OK.
7. After adding the login, it should be listed under the Logins folder.
8. To add new login as a user to the appropriate database, right-click the new login, and click Properties.
9. Click User Mapping.
10. Under Users mapped to this login, mark Dynamics.
11. Under Database role membership for: Dynamics, mark the rpt\_All user database role or the rpt\_All group database role.



*The rpt\_All group database role is required for all users to run Reporting Services reports.*

12. Under Users mapped to this login, mark the company database that the user or group should have access to.
13. Under Database role membership for: <company database>, mark the appropriate database roles required.

To review what database roles for reports, download MDGP10\_SRSReports\_Roles (<https://mbs.microsoft.com/fileexchange/?fileID=80628e60-729d-4e47-bbd5-37af74ea39c7>). (CustomerSource login required.)

14. Click OK.



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