Microsoft Dynamics® GP 2010

SQL Server Reporting Services Guide

April 4, 2012

Contents

Introduction

The SQL Server® Reporting Services Guide describes how to install and configure Microsoft® SQL Server Reporting Services, how to deploy predefined reports that are included in Microsoft Dynamics GP to a server or to a Microsoft SharePoint® reports library using the Reporting Tools Setup window, and how to set up security for reports.

Review the following table for the version of SQL Server Reporting Services and the report type available for that version.

SQL Server Reporting Services version	Report type available
Reporting Services 2005 with latest service pack Reporting Services 2008 Reporting Services 2008 R2 Reporting Services 2012	SQL Server Reporting Services reports
Reporting Services 2008 Reporting Services 2008 R2 Reporting Services 2012	Charts and key performance indicators (KPIs)
Reporting Services 2008 R2 Reporting Services 2012	Map charts

This introduction is divided into the following sections:

- *Symbols and conventions*
- *Contacting Microsoft Dynamics GP Technical Support*
- *Send us your documentation comments*

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
Creating a batch	Italicized type indicates the name of a section or procedure.
File >> Print or **File > Print**	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 Requests under Assisted Support to send an eSupport request.

- Telephone 1-888-477-7877 (U.S. and Canada only) or +1-701-281-0555.

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.

To send comments about specific topics from within Help, click the Documentation Feedback link, which is located at the bottom of each Help topic.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Chapter 1:   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.

Server

· Microsoft SQL Server
· IIS (SQL Server 2005 only)
· Reporting Services

Client Workstation

· Microsoft Dynamics GP
· Outlook®
· Internet Explorer®
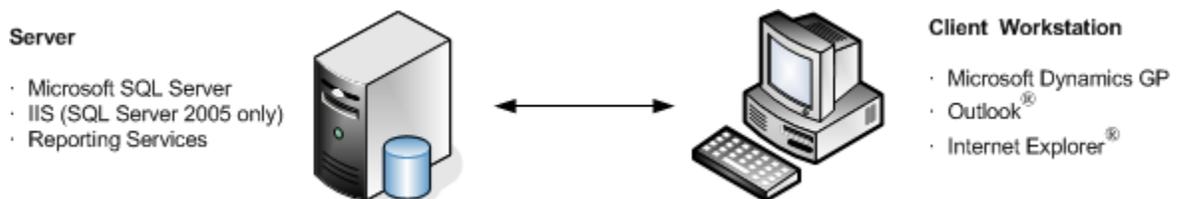
Separate server configuration

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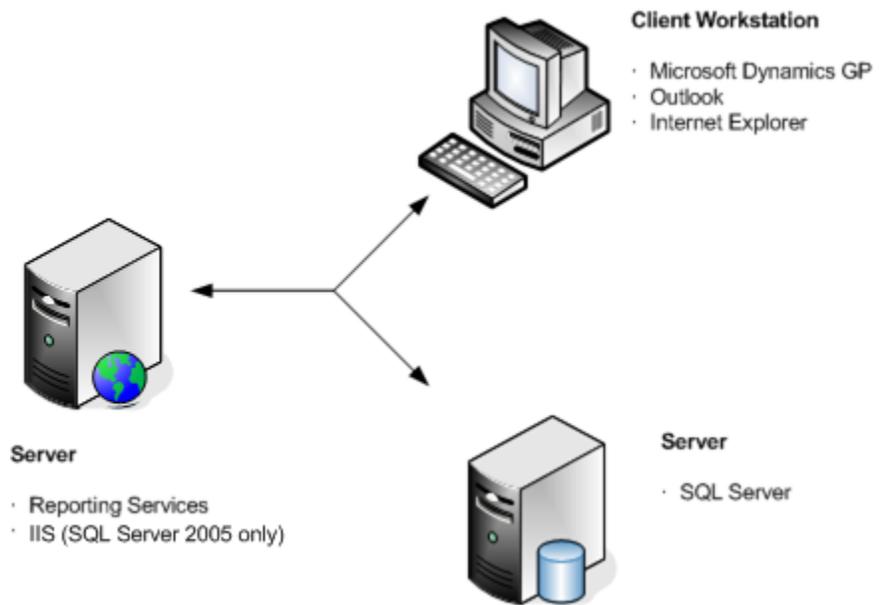
Scale-out deployment model

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.

Servers

· Reporting Services
· IIS (SQL Server 2005 only)

Server

· SQL Server

Client Workstation

· Microsoft Dynamics GP
· Outlook
· Internet Explorer
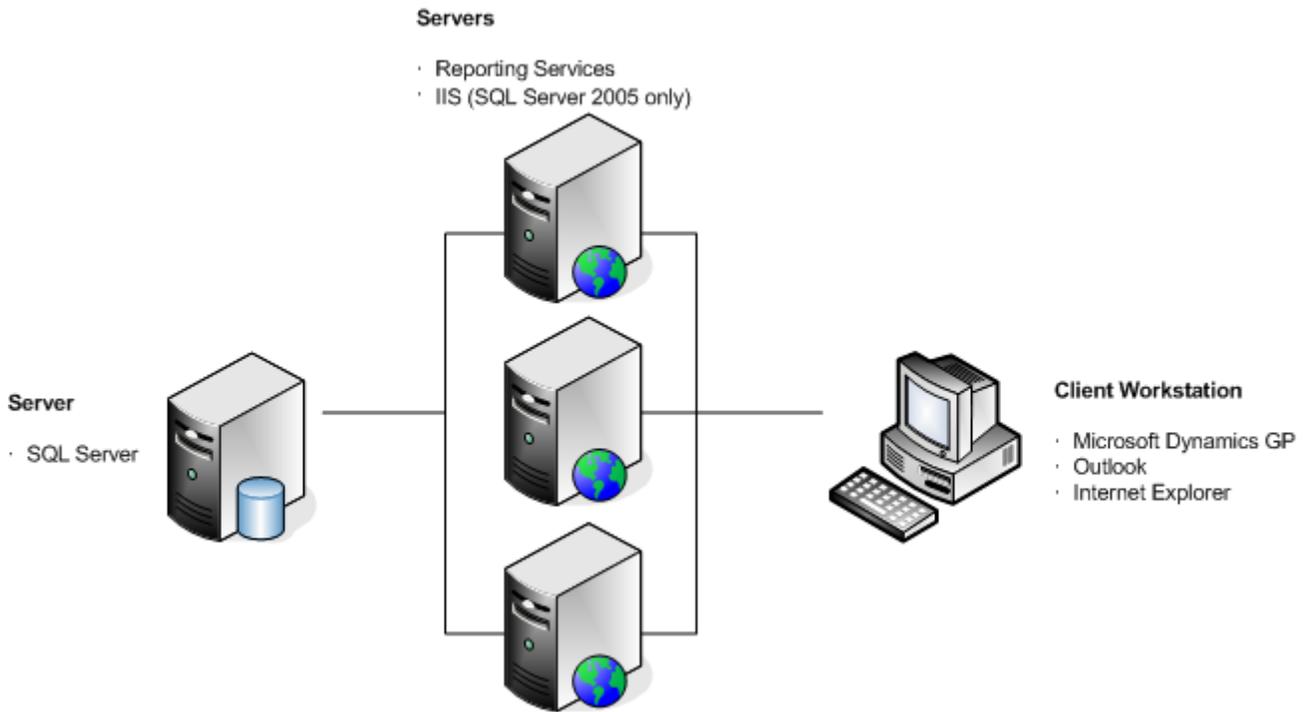
Chapter 2: Reporting Services checklists

Use one of the following checklists to install and set up Reporting Services. Next to each step in a checklist is a reference to where you can find more detailed information.

This chapter includes the following sections.

- *Reporting Services 2005 Native mode setup checklist*
- *Reporting Services 2008 Native mode setup checklist*
- *Reporting Services 2008 for Windows SharePoint Services setup checklist*
- *Reporting Services 2008 for Microsoft Office SharePoint Server setup checklist*
- *Reporting Services 2008 R2 Native mode setup checklist*
- *Reporting Services 2008 R2 for Microsoft SharePoint 2010 setup checklist*
- *Reporting Services 2012 Native mode setup checklist*
- *Reporting Services 2012 for Microsoft SharePoint 2010 setup checklist*

Reporting Services 2005 Native mode setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2005 in the Native mode.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 17
3. Configure IIS.	*Configuring IIS for Reporting Services 2005* on page 17
4. Install Reporting Services 2005 with Service Pack 2 or later. The configuration options available depend whether you are installing Reporting Services at the same time as the SQL Server database or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **Install the default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server instance is ready to use after installation is complete. The report server database is created using a local Database Engine instance, and a report server is configured to use default values. **Install but do not configure the server** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2005* on page 20 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.
5. Configure Reporting Services 2008 R2.	*Configuring Reporting Services 2005* on page 21 This step is required if you selected the **Install but do not configure the server** option when installing Reporting Services.
6. Verify that you can connect to the Report Manager.	*Starting Report Manager* on page 22
7. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server and the Report Manager and deploy reports. In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)
8. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2008 Native mode setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2008 in the Native mode.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 23
3. Configure the Web Server (IIS) role.	*Configuring Web Server (IIS) for Reporting Services 2008* on page 23
4. Install Reporting Services 2008. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **Native mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server instance is ready to use after installation is complete. The report server database is created using a local Database Engine instance, and a report server is configured to use default values. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2008* on page 26 This procedure assumes that you have already installed Microsoft SQL Server 2008, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2008.	*Configuring Reporting Services 2008* on page 28 This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
6. Verify that you can connect to the Report Manager.	*Starting Report Manager* on page 29
7. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server and the Report Manager, and deploy reports. In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)
8. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2008 for Windows SharePoint Services setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2008 in the SharePoint Integrated mode, and creating a site collection and reports library for Windows SharePoint Services.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 23
3. Configure the Web Server (IIS) role.	*Configuring Web Server (IIS) for Reporting Services 2008* on page 23
4. Install Reporting Services 2008. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **SharePoint Integrated mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server database is created in a format that supports content storage and addressing from a SharePoint site. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2008* on page 26 This procedure assumes that you have already installed Microsoft SQL Server 2008, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2008 R2.	*Configuring Reporting Services 2008* on page 28 This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
6. Verify that you can connect to the Report Server.	*Starting Report Server* on page 29
7. Create a Reports site.	*Creating a Reports site in Windows SharePoint Services* on page 29
8. Create a Reports Library.	*Creating a Reports Library in Windows SharePoint Services* on page 30
9. Install the SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies.	*Installing SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies* on page 30. The SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies allows you to integrate your reporting environment with Microsoft SharePoint.
10. Verify that the Reporting Services Integration feature is activated.	*Activating Report Server Integration* on page 31
11. Configure Report Services Integration.	*Configuring Report Server Integration* on page 31
12. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**) Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, the Report Manager, or the Reports Library, and deploy reports.
13. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2008 for Microsoft Office SharePoint Server setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2008 in the SharePoint Integrated mode, and storing reports in Microsoft Office SharePoint Server.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 23
3. Configure the Web Server (IIS) role.	*Configuring Web Server (IIS) for Reporting Services 2008* on page 23
4. Install Reporting Services 2008 R2. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **SharePoint Integrated mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server database is created in a format that supports content storage and addressing from a SharePoint site. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2008* on page 26 This procedure assumes that you have already installed Microsoft SQL Server 2008, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2008.	This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
6. Verify that you can connect to the Report Server.	*Starting Report Server* on page 29
7. Create a site collection.	*Storing reports in Microsoft Office SharePoint Server 2007* on page 30
9. Install the SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies.	*Installing SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies* on page 30. The SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies allows you to integrate your reporting environment with Microsoft SharePoint.
10. Verify that the Reporting Services Integration feature is activated.	*Activating Report Server Integration* on page 31
11. Configure Report Services Integration.	*Configuring Report Server Integration* on page 31
12. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**) Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, the Report Manager, or the Reports Library, and deploy reports.
13. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2008 R2 Native mode setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2008 R2 in the Native mode.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 33
3. Configure the Web Server (IIS) role.	*Configuring Web Server (IIS) role for Reporting Services 2008 R2* on page 34
4. Install Reporting Services 2008 R2. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **Native mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server instance is ready to use after installation is complete. The report server database is created using a local Database Engine instance, and a report server is configured to use default values. Note: Microsoft Dynamics CRM supports only the native mode of deployment of Reporting Services 2008 R2. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2008 R2* on page 36 This procedure assumes that you have already installed Microsoft SQL Server 2008 R2, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2008 R2.	*Configuring Reporting Services 2008 R2* on page 38 This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
6. Verify that you can connect to the Report Manager.	*Starting Report Manager* on page 39
7. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, the Report Manager, or the Reports Library, and deploy reports. If you are using Microsoft Dynamics CRM 2011 or later, you can enter location of the CRM services and the name of the organization. In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)
8. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2008 R2 for Microsoft SharePoint 2010 setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2008 R2 in the SharePoint Integrated mode, and creating a site collection and reports library for Microsoft SharePoint 2010.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 33
3. Configure Web Server (IIS) role.	*Configuring Web Server (IIS) role for Reporting Services 2008 R2* on page 34
4. Install Reporting Services 2008 R2. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **SharePoint Integrated mode default configuration** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server database is created in a format that supports content storage and addressing from a SharePoint site. Note: Microsoft Dynamics CRM supports only the native mode of deployment of Reporting Services 2008 R2. **Unconfigured Reporting Services installation** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2008 R2* on page 36 This procedure assumes that you have already installed Microsoft SQL Server 2008 R2, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2008 R2.	*Configuring Reporting Services 2008 R2* on page 38 This step is required if you selected the **Unconfigured Reporting Services installation** option when installing Reporting Services.
6. Verify that you can connect to the Report Server.	*Starting Report Server* on page 39
7. Create a Reports site.	*Creating a Reports site in Microsoft SharePoint 2010* on page 39
8. Create a Reports Library.	*Creating a Reports Library in Microsoft SharePoint 2010* on page 39
9. Install the SQL Server Reporting Services SharePoint 2010 Add-in.	*Installing SQL Server Reporting Services Add-in for SharePoint 2010 Technologies* on page 40 The SQL Server Reporting Services SharePoint 2010 Add-in is installed as a prerequisite for SharePoint Foundation and SharePoint Server if Reporting Services is already installed. If you install Reporting Services 2008 after installing SharePoint, you can use the Microsoft SharePoint 2010 Products Preparation Tool to install the add-in.
10. Configure Report Services Integration.	*Configuring Reporting Services Integration* on page 41
11. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**) Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, or the Reports Library, and deploy reports.
12. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2012 Native mode setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2012 in the Native mode.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 43
3. Configure the Web Server (IIS) role.	*Configuring Web Server (IIS) role for Reporting Services 2012* on page 44
4. Install Reporting Services 2012. The configuration options available depend whether you are installing Reporting Services at the same time as other SQL Server components or are installing Reporting Services as an additional component.	During the Reporting Services installation, you can specify one of the following options as the type of Reporting Services installation to create. **Install and configure** Installs a report server instance using the default values for the report server databases, service account, and URL reservations. The report server instance is ready to use after installation is complete. The report server database is created using a local Database Engine instance, and a report server is configured to use default values. Note: Microsoft Dynamics CRM supports only the native mode of deployment of Reporting Services 2012. **Install only** Installs the report server program files, creates the Report Server service account, and registers the report server Windows Management Instrumentation (WMI) provider. After the installation is complete, you must create the report server database and configure the report server before it can be used. *Installing Reporting Services 2012* on page 46 This procedure assumes that you have already installed Microsoft SQL Server 2012, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2012.	*Configuring Reporting Services 2012 in Native mode* on page 47 This step is required if you selected the **Install only** option when installing Reporting Services.
6. Verify that you can connect to the Report Manager.	*Starting Report Manager* on page 49
7. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, the Report Manager, or the Reports Library, and deploy reports. If you are using Microsoft Dynamics CRM 2011 or later, you can enter location of the CRM services and the name of the organization. In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)
8. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Reporting Services 2012 for Microsoft SharePoint 2010 setup checklist

Use this checklist as your guide to installing and setting up Reporting Services 2012 in the SharePoint Integrated mode, and creating a site collection and reports library for Microsoft SharePoint 2010.

Step	Detail
1. Select a Reporting Services deployment configuration.	Chapter 1, "Deployment configurations."
2. Verify system requirements.	*Requirements* on page 43
3. Configure Web Server (IIS) role.	*Configuring Web Server (IIS) role for Reporting Services 2012* on page 44
4. Install Reporting Services 2012.	During the Reporting Services installation for the SharePoint Integrated mode, the report server program files are installed. After the installation is complete, you must use the SharePoint Central Administration to complete the configuration. Verify the SQL Server Reporting Services service is started and create at least one SQL Server Reporting Services service application. Note: Microsoft Dynamics CRM supports only the native mode of deployment of Reporting Services 2012. *Installing Reporting Services 2012* on page 46 This procedure assumes that you have already installed Microsoft SQL Server 2012, but not Reporting Services. These instructions are for installing Reporting Services as a single-server configuration.
5. Configure Reporting Services 2012 in SharePoint Integrated mode.	*Installing the Reporting Services SharePoint service* on page 49 *Starting the Reporting Services SharePoint service* on page 49 *Creating a Reporting Services service application* on page 50 This step is required.
7. Create a Reports site.	*Creating a Reports site in Microsoft SharePoint 2010* on page 51
8. Create a Reports Library.	*Creating a Reports Library in Microsoft SharePoint 2010* on page 51
10. Configure Report Services Integration.	*Configuring Reporting Services Integration* on page 52
11. Activate Claims to Windows Token Service	*Activating the Claims to Windows Token Service* on page 52
12. Deploy predefined Reporting Services reports.	Chapter 7, "Deploying Reporting Services reports." In Microsoft Dynamics GP, open the Reporting Tools Setup window. (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**) Use the Reporting Tools Setup window to select the configuration mode, to define locations of the Report Server, or the Reports Library, and deploy reports.
13. Set up security for Reporting Services.	Chapter 8, "Reporting Services Security Setup."

Chapter 3: Installing Reporting Services 2005

Use the information in this chapter to install and configure Reporting Services 2005. This chapter contains the following sections:

Requirements

The following components must be installed before you can install SQL Server Reporting Services 2005 to use with Microsoft Dynamics GP.

Item	Requirements
Operating system 32-bit and 64-bit supported	**Server** Windows Server® 2003 with latest service pack Windows Server 2008 with latest service pack Windows Server 2008 R2 with latest service pack **Client** Windows Vista® with latest service pack Windows 7 with latest service pack
Database	Microsoft SQL Server 2005 with service pack 2 or later If you are using WIndows Server 2008 R2, you must use Microsoft SQL Server 2005 with service pack 3 or later.
Web server for Reporting Services 2005	Internet Information Services (IIS) 6.0 IIS 7.0 on Windows Server 2008
Web browser	Internet Explorer 8 Internet Explorer 7
Microsoft Dynamics GP	Microsoft Dynamics GP 2010

Configuring IIS for Reporting Services 2005

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.

To configure Web Server (IIS) for Windows Server 2008:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role. Click **Next** to continue.

5. Review the information about the Web Server (IIS) role. Click **Next** to continue.

6. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common Http Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .Net Extensibility ISAPI Extensions ISAPI Filters
Security	Windows Authorization Request Filtering

7. In the Select Role Services window, select the following components for the Management Tools role service.

    *   IIS Management Console
    *   IIS 6 Management Compatibility

8. Click **Next**.

9. Review the installation messages, and then click **Install**.

10. After you have viewed the installation results, click **Close**.

To configure Web Server (IIS) for Windows Server 2008 R2:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common Http Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .Net Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering
Performance	Static Content Compression

Management Tools	IIS Management Console
	IIS 6 Management Compatibility
	   ISS 6 Metabase Compatibility
	   ISS 6 WMI Compatibility
	   ISS 6 Scripting Tools
	   ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

13. Be sure that .NET Framework 3.5 Features is installed if you are using Windows Server 2008 R2. If it isn't, use Add Features in Server Manager to add the features.

Installing Reporting Services 2005

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 1, "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.

The SQL Server that hosts your Microsoft Dynamics GP data must be using mixed-mode authentication. (Mixed-mode authentication allows you to use either Windows Authentication or SQL Authentication to access the SQL Server.).

To install Reporting Services 2005:

1. Insert the SQL Server 2005 media. The main SQL Server installation screen should appear. If you do not see this screen, browse the media 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 **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 or later before you configure SQL Server Reporting Services.

Configuring Reporting Services 2005

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 2005:

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 the virtual directory will be created, 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 the virtual directory will be created, 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 is 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.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<servername>/reports*.

Chapter 4: Installing Reporting Services 2008

Use the information in this chapter to install and configure Reporting Services 2008. This chapter contains the following sections:

Requirements

The following components must be installed before you can install SQL Server Reporting Services 2008 to use with Microsoft Dynamics GP.

Item	Requirements
Operating system 32-bit and 64-bit supported	**Server** Windows Server 2003 with latest service pack Windows Server 2008 with latest service pack Windows Server 2008 R2 with latest service pack **Client** Windows Vista with latest service pack Windows 7 with latest service pack
Database	Microsoft SQL Server 2008 with service pack 1 or later Microsoft SQL Server 2008 R2
SharePoint	Windows SharePoint Services 3.0 or later Microsoft Office SharePoint Server, Enterprise Edition Microsoft SharePoint Foundation 2010 Microsoft SharePoint Server 2010
Web browser	Internet Explorer 9 Internet Explorer 8 Internet Explorer 7
Microsoft Dynamics GP	Microsoft Dynamics GP 2010 or later

If you are using Reporting Services 2008, you can use either the SQL Server 2008 database engine, SQL Server 2008 R2 database engine, or the SQL Server 2005 database engine for Microsoft Dynamics GP.

Configuring Web Server (IIS) for Reporting Services 2008

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.

To configure Web Server (IIS) for Windows Server 2008:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering

Performance	Static Content Compression
	IIS Management Console
	IIS 6 Management Compatibility
	  ISS 6 Metabase Compatibility
	  ISS 6 WMI Compatibility
	  ISS 6 Scripting Tools
	  ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

To configure Web Server (IIS) for Windows Server 2008 R2:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering
Performance	Static Content Compression

Management Tools	IIS Management Console
	IIS 6 Management Compatibility
	  ISS 6 Metabase Compatibility
	  ISS 6 WMI Compatibility
	  ISS 6 Scripting Tools
	  ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

13. Be sure that .NET Framework 3.5 Features is installed if you are using Windows Server 2008 R2. If it isn't, use Add Features in Server Manager to add the features

Installing Reporting Services 2008

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 2008, 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 1, "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.

The SQL Server that hosts your Microsoft Dynamics GP data must be using mixed-mode authentication. (Mixed-mode authentication allows you to use either Windows Authentication or SQL Authentication to access the SQL Server.)

To install Reporting Services 2008:

1. Insert the SQL Server 2008 media. The main SQL Server installation screen should appear. If you do not see this screen, browse the media and double-click the setup.exe file.

2. Click **Yes** to make changes to your computer if you are using User Account Control.

3. In the SQL Server Installation Center, click **Installation**.

4. Click **New SQL Server stand-alone installation or add features to an existing installation**.

5. In the Setup Support Rules window, click OK.

6. In the Setup Support Files window, click **Install**.

7. Your computer is scanned for conditions that may cause possible installation problems. To proceed with the installation, click **Next**.

8. In the Installation Type window, select **Add features to an existing instance of SQL Server 2008** and click **Next**.

9. In the Feature Selection window, select **Reporting Services** and any other feature you want to install. Click **Next**.

10. In the Disk Requirements window, click **Next**.

11. In the Server Configuration window, enter the Account Name. Click **Next**.

12. In the Reporting Services Configuration window, click **Next**.

    You will have to configure the report server using the Reporting Services Configuration Manager after installing Reporting Services.

13. In the Error and Usage Reporting window, click **Next**.

14. In the Installation Rules window, click **Next**.

15. In the Ready to Install window, click **Install**.

16. The Installation Progress window appears, allowing you to view the status of the installation. Click **Next** after the installation is completed.

17. In the Complete window, click **Close** to exit the installation wizard.

18. Restart the computer if you are instructed to do so.

Configuring Reporting Services 2008

Use the Report Server Configuration Manager to configure and start Reporting Services in Native mode. The Report Server Configuration Manager has a number of pages that you can use to configure Reporting Services.

To configure Reporting Services 2008:

1. Start Reporting Services Configuration Manager.
    (**Start** > **All Programs** > **Microsoft SQL Server 2008** > **Configuration Tools** > **Reporting Services Configuration Manager**)

2. Click **Yes** to make changes to your computer if you are using User Account Control.

3. Enter the name of a server and select an instance to connect to a report server instance. 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.

4. 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.

5. In the navigation pane, click **Service Account** to open the page. Be sure that the **Use the built-in account** option is selected.

6. In the navigation pane, click **Web Service URL** to open the Web Service URL page. This page allows you to view and change the name of the virtual directory used by the Reporting Services Web service.

7. Click **Apply** to create a new virtual directory.

8. In the navigation pane, click **Database** to open the Report Server Database page.

9. Click **Change Database**.

10. Select to create a new report server database, and click **Next**.

11. Select Authentication type and specify the user name and password, if necessary. Click **Next**.

12. Specify the database name and specify the Report Server mode. Click **Next**.

13. Select Authentication type and specify the user name and password for your credentials, if necessary. Click **Next**.

14. Verify the database information. Click **Next**.

15. After the database is configured, click **Finish**.

16. If you selected Native mode for your report server database, click **Report Manager URL** to open the Report Manager URL page in the navigation pane. Click **Apply**.

17. Click **Exit**.

Starting Report Manager

Report Manager is installed during setup on the same computer as the report server. If you selected Native mode for your report server database, you should verify that you can connect to the Report Manager.

To start Report Manager:

1. Open Microsoft Internet Explorer.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<ComputerName>/Reports*

Starting Report Server

If you selected the SharePoint Integrated mode for your report server database, you should verify that you can connect to the Report Server.

To start Report Server:

1. Open Microsoft Internet Explorer.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<ComputerName>/ReportServer*.

Creating a Reports site in Windows SharePoint Services

If you selected the SharePoint Integrated mode for your report server database, you can store reports in a SharePoint reports library. If you don't have a site in Windows SharePoint Services that serves as a central location to manage Reporting Services reports, create a Reports site.

To create a Reports site in Windows SharePoint Services:

1. Type http://<ServerName> in the address field of Internet Explorer.

2. Click **View All Site Content**.

3. Click **Create**.

4. Under Web Pages, click **Sites and Workspaces**.

5. In the New SharePoint Site page, enter a title and description of the site.

6. Enter the URL name. For example, http://<ServerName>/Reports.

7. Select **Document Workspace** as the template.

8. Click **Create**.

Creating a Reports Library in Windows SharePoint Services

After creating a Reports site in Windows SharePoint Services, you need to create a reports library. A reports library is a location on the Reports site where you can store your Reporting Services reports.

To create a Reports Library in Windows SharePoint Services:

1. Type http://<ServerName>/Reports in the address field of Internet Explorer.

2. Click **View All Site Content**.

3. Click **Create**.

4. Under Libraries, click **Document Library**.

5. In the New page, enter a name and a description.

6. Select **None** as the document template.

7. Click **Create**.

Storing reports in Microsoft Office SharePoint Server 2007

The Report Center is automatically created when you install Microsoft Office SharePoint Server, Enterprise Edition. The Report Center is a site that serves as a central location to manage business-critical information sources, such as Microsoft SQL Server Reporting Service reports and spreadsheets. A reports library is also automatically created.

The Report Center site is available at the same level of navigation as the top-level portal site. With the appropriate permissions, you can create a Report Center site within a team, department, or organization site. You also can create additional report libraries if you choose. For more information, see your Office SharePoint Server 2007 documentation.

Installing SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies

The SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies allows you to integrate your reporting environment with Microsoft SharePoint. Once you install the add-in and configure your servers for integration, you can publish Reporting Services reports to a reports library and then view and manage the reports from a SharePoint site.

Installing the SQL Server 2008 Reporting Services Add-in will activate the report server integration feature for all existing site collections. If the root site is not enabled or if you do not have a site collection defined when the Reporting Services Add-in is installed, you must activate the report server integration settings manually.

To install the SQL Server 2008 Reporting Services Add-in for Microsoft SharePoint Technologies:

1. Download the SQL Server Reporting Services Add-in for SharePoint Technologies from http://www.microsoft.com/downloads.

2. In the welcome window, click **Next**.

3. Accept the license agreement.

4. Enter registration information and click **Next**.

5. Click **Install**.

6. After the add-in is installed, click **Finish**.

Activating Report Server Integration

The Report Server Integration feature is automatically activated after you install the Microsoft SQL Server 2008 Reporting Services Add-in for SharePoint products. By default, the Reporting Services Add-in is activated for the root site collection of the local SharePoint Web application. If the root site is not enabled or if you do not have a site collection defined when the Reporting Services Add-in is installed, you must activate the report server integration settings manually.

If the Reporting Server Integration feature does not appear in the site collection feature list, the Reporting Services Add-in is not installed. To verify installation, view the list of installed applications in Microsoft Windows Control Panel. If the Reporting Services Add-in is installed, follow the instructions in this topic to activate the feature.

To activate the Report Server Integration feature:

1. Type http://<ServerName> in the address field of Internet Explorer.

   Go to the Site Settings page (**Site Actions** > **Site Settings**) for the top-level web site.

2. Under **Site Collection Administration** in the Site Settings page, click **Site collection features**.

3. Be sure that the Report Server Integration Feature is activated.

Configuring Report Server Integration

You must specify integration settings that determine the connection between SharePoint and a report server. The settings that you specify are stored in the configuration database. You must be an administrator on the SharePoint farm to configure report server integration. You also must have a target report server that is already connected to a report server database that was created for SharePoint integrated.

If you don't have the SQL Server Reporting Services SharePoint Add-in installed, the configuration pages and general integration are not available.

To configure Report Services Integration:

1. Open SharePoint Central Administration.
    (**Start** > **Administrative Tools** > **SharePoint Central 3.0 Administration**)

2. Click **Application Management.**

3. Under the **Reporting Services** heading, click **Grant database access**.

4. In the Grant Database Access page, specify the server name and the instance.
    Click **OK**.

5. Enter your credentials and click **OK**.

6. Under the **Reporting Services** heading, click **Manage integration settings**.

7. In the Reporting Services Integration page, specify the URL for the report server
    web service. For example, http://<ServerName> /ReportServer)

8. Select the authentication mode. Click **OK**.

Chapter 5: Installing Reporting Services 2008 R2

Use the information in this chapter to install and configure Reporting Services 2008 R2. This chapter contains the following sections:

Requirements

The following components must be installed before you can install SQL Server Reporting Services 2008 R2 to use with Microsoft Dynamics GP.

Item	Requirements
Operating system 32-bit and 64-bit supported	**Server** Windows Server 2003 with latest service pack Windows Server 2008 with latest service pack Windows Server 2008 R2 with latest service pack **Client** Windows Vista with latest service pack Windows 7 with latest service pack
Database	Microsoft SQL Server 2008 with service pack 1 or later Microsoft SQL Server 2008 R2
SharePoint	Windows SharePoint Services 3.0 or later Microsoft Office SharePoint Server, Enterprise Edition Microsoft SharePoint Foundation 2010 Microsoft SharePoint Server 2010
Web browser	Internet Explorer 9 Internet Explorer 8 Internet Explorer 7
Microsoft Dynamics GP	Microsoft Dynamics GP 2010 R2 or later

If you are using Reporting Services 2008 R2, you can use either the SQL Server 2008 database engine, SQL Server 2008 R2 database engine, or the SQL Server 2005 database engine for Microsoft Dynamics GP.

Microsoft Dynamics GP CRM requirements

You must be using SQL Server 2008 R2 Reporting Services and Microsoft Dynamics CRM 2011 or later to deploy SQL Server Reporting Services reports and metrics that includes CRM data. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

You must install the Microsoft Dynamics CRM Reporting Extensions on the Microsoft Dynamics GP report server to render reports. Before you render a SQL

Server Reporting Services report with CRM data, be sure to start the Microsoft Dynamics CRM application to initialize data.

Configuring Web Server (IIS) role for Reporting Services 2008 R2

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.

To configure Web Server (IIS) for Windows Server 2008:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering

Performance	Static Content Compression
	IIS Management Console
	IIS 6 Management Compatibility
	  ISS 6 Metabase Compatibility
	  ISS 6 WMI Compatibility
	  ISS 6 Scripting Tools
	  ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

To configure Web Server (IIS) for Windows Server 2008 R2:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering
Performance	Static Content Compression

Management Tools	IIS Management Console
	IIS 6 Management Compatibility
	  ISS 6 Metabase Compatibility
	  ISS 6 WMI Compatibility
	  ISS 6 Scripting Tools
	  ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

Installing Reporting Services 2008 R2

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 2008 R2, 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 1, "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.

The SQL Server that hosts your Microsoft Dynamics GP data must be using mixed-mode authentication. (Mixed-mode authentication allows you to use either Windows Authentication or SQL Authentication to access the SQL Server.)

To install Reporting Services 2008 R2:

1. Insert the SQL Server 2008 R2 media. The main SQL Server installation screen should appear. If you do not see this screen, browse the media and double-click the setup.exe file.

2. Click **Yes** to make changes to your computer if you are using User Account Control.

3. In the SQL Server Installation Center, click **Installation**.

4. Click **New installation or add features to an existing installation**.

5. In the Setup Support Rules window, click **OK**.

6. In the Setup Support Files window, click **Install**.

7. Your computer is scanned for conditions that may cause possible installation problems. To proceed with the installation, click **Next**.

8. In the Installation Type window, select **Add features to an existing instance of SQL Server 2008 R2** and click **Next**.

9. In the Feature Selection window, select Reporting Services and any other feature you want to install. Click **Next**.

10. In the Installation Rules window, click **Next**.

11. In the Disk Space Requirements window, click **Next**.

12. In the Server Configuration window, enter the Account Name. Click **Next**.

13. In the Reporting Services Configuration window, click **Next**.

    You will have to configure the report server using the Reporting Services Configuration Manager after installing Reporting Services.

14. In the Error Reporting window, click **Next**.

15. In the Installation Configuration Rules window, click **Next**.

16. In the Ready to Install window, click **Install**.

17. The Installation Progress window appears, allowing you to view the status of the installation. Click **Next** after the installation is completed.

18. In the Complete window, click **Close** to exit the installation wizard.

19. Restart the computer if you are instructed to do so.

Configuring Reporting Services 2008 R2

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.

To configure Reporting Services 2008 R2:

1. Start Reporting Services Configuration Manager.
   (**Start** > **All Programs** > **Microsoft SQL Server 2008 R2** > **Configuration Tools** > **Reporting Services Configuration Manager**)

2. Click **Yes** to make changes to your computer if you are using User Account Control.

3. Enter the name of a server and select an instance to connect to a report server instance. 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.

4. 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.

5. In the navigation pane, click **Service Account** to open the page. Be sure that the **Use the built-in account** option is selected.

6. In the navigation pane, click **Web Service URL** to open the Web Service URL page. This page allows you to view and change the name of the virtual directory used by the Reporting Services Web service.

7. Click **Apply** to create a new virtual directory.

8. In the navigation pane, click **Database** to open the Report Server Database page.

9. Click **Change Database**.

10. Select to create a new report server database, and click **Next**.

11. Select Authentication type and specify the user name and password, if necessary. Click **Next**.

12. Specify the database name and specify the mode. Click **Next**.

13. Select Authentication type and specify the user name and password for your credentials, if necessary. Click **Next**.

14. Verify the database information. Click **Next**.

15. After the database is configured, click **Finish**.

16. If you selected Native mode for your report server database, click **Report Manager URL** to open the Report Manager URL page in the navigation pane. Click **Apply**.

17. Click **Exit**.

Starting Report Manager

Report Manager is installed during setup on the same computer as the report server. If you selected Native mode for your report server database, you should verify that you can connect to the Report Manager.

To start Report Manager:

1. Open Microsoft Internet Explorer.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<ComputerName>/Reports.*

Starting Report Server

If you selected the SharePoint Integrated mode for your report server database, you should verify that you can connect to the Report Server.

To start Report Server:

1. Open Microsoft Internet Explorer.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<ComputerName>/ReportServer.*

Creating a Reports site in Microsoft SharePoint 2010

If you selected the SharePoint Integrated mode for your report server database, you can store reports in a Microsoft SharePoint 2010 reports library. If you don't have a site in Microsoft SharePoint that serves as a central location to manage Reporting Services reports, create a Reports site.

If you are using Business Portal 5.1 R2 for Microsoft Dynamics GP, you can use the GP Reports Center for your central location.

To create a Reports site in Microsoft SharePoint 2010

1. Type http://<ServerName> in the address field of Internet Explorer.

2. Click the **Site Actions**, and then click **New site**.

3. In the New SharePoint Site page, enter a title and description of the site.

4. Enter the URL name. For example, http://<ServerName>/Reports.

5. Select a template.

6. Choose any other option you want, and then click **Create**.

Creating a Reports Library in Microsoft SharePoint 2010

After creating a Reports site in Microsoft SharePoint, you need to create a reports library. A reports library is a location on the Reports site where you can store your Reporting Services reports.

If you are using Business Portal 5.1 R2 for Microsoft Dynamics GP, you can create the reports library on the GP Reports Center site.

To create a Reports Library in Microsoft SharePoint 2010

1. Type http://<ServerName>/Reports in the address field of Internet Explorer.

2. Click the **Site Actions** menu, and then click **New Document Library**.

3. In the New page, enter a name and a description.

4. Choose any other option you want, and then click **Create**.

5. In the **Library Tools** group, click **Library settings**.

6. Under General Settings in the Document Library Settings page, click **Advanced settings**.

7. In the Advanced settings page, select to allow management of content type.

8. Select **Open in the client application** as the default open behavior for browser-enabled documents.

9. Click **OK**.

10. Under Content types in the Document Library Settings page, click **Document**.

11. Under Settings in Document page, click **Name and description**.

12. In the Settings page, change the name to Reports.

13. Click **OK**.

Installing SQL Server Reporting Services Add-in for SharePoint 2010 Technologies

The SQL Server 2008 R2 Reporting Services Add-in for Microsoft SharePoint Technologies 2010 allows you to integrate your reporting environment with Microsoft SharePoint. Once you install the add-in and configure your servers for integration, you can publish Reporting Services reports to a reports library and then view and manage the reports from a SharePoint site.

Installing the SQL Server 2008 R2 Reporting Services Add-in will activate the report server integration feature for all existing site collections and will automatically active for new site collections.

The SQL Server Reporting Services SharePoint 2010 Add-in is installed as a prerequisite for SharePoint Foundation and SharePoint Server if Reporting Services is already installed. If you install Reporting Services 2008 R2 after installing SharePoint, you can use the Microsoft SharePoint 2010 Products Preparation Tool to install the add-in or you can download the add-in from http://www.microsoft.com/downloads.

To install the SQL Server Reporting Services Add-in for SharePoint 2010 Technologies:

1. Download the SQL Server Reporting Services Add-in for SharePoint Technologies from http://www.microsoft.com/downloads.

2. In the welcome window, click **Next**.

3. Accept the license agreement.

4. Enter registration information and click **Next**.

5. Click **Install**.

6. After the add-in is installed, click **Finish**.

Configuring Reporting Services Integration

You must specify integration settings that determine the connection between SharePoint and a report server. The settings that you specify are stored in the configuration database. You must be an administrator on the SharePoint farm to configure report server integration. You also must have a target report server that is already connected to a report server database that was created for SharePoint integrated.

If you don't have the SQL Server Reporting Services SharePoint 2010 Add-in installed, the configuration pages and general integration are not available.

To configure Reporting Services Integration

1. Open SharePoint Central Administration.
   (**Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**)

2. Click **General Application Settings**.

3. Under the Reporting Services heading, click **Reporting Services Integration**.

4. Enter the Report Server Web Service URL. For example, http://<ServerName>/ReportServer).

5. Select **Windows Authentication** as the authentication mode.

6. Enter your credentials and click **OK**.

Chapter 6: Installing Reporting Services 2012

Use the information in this chapter to install and configure Reporting Services 2012. This chapter contains the following sections:

- *Requirements*
- *Microsoft Dynamics GP CRM requirements*
- *Configuring Web Server (IIS) role for Reporting Services 2012*
- *Installing Reporting Services 2012*
- *Configuring Reporting Services 2012 in Native mode*
- *Starting Report Manager*
- *Installing the Reporting Services SharePoint service*
- *Starting the Reporting Services SharePoint service*
- *Creating a Reporting Services service application*
- *Creating a Reports site in Microsoft SharePoint 2010*
- *Creating a Reports Library in Microsoft SharePoint 2010*
- *Configuring Reporting Services Integration*
- *Activating the Claims to Windows Token Service*

Requirements

The following components must be installed before you can install SQL Server Reporting Services 2012 to use with Microsoft Dynamics GP.

Item	Requirements
Operating system 32-bit and 64-bit supported	**Server** Windows Server 2008 with latest service pack Windows Server 2008 R2 with latest service pack **Client** Windows Vista with latest service pack Windows 7 with latest service pack
Database	Microsoft SQL Server 2008 with service pack 1 or later Microsoft SQL Server 2008 R2 Microsoft SQL Server 2012
SharePoint	Microsoft SharePoint Foundation 2010 with service pack 1 Microsoft SharePoint Server 2010 with service pack 1
Web browser	Internet Explorer 9 Internet Explorer 8 Internet Explorer 7
Microsoft Dynamics GP	Microsoft Dynamics GP 2010 R2 or later SQL Server 2012 is compatible with Microsoft Dynamics GP 2010 11.00.1914 or later.

If you are using Reporting Services 2012, you can use either the SQL Server 2008 database engine, SQL Server 2008 R2 database engine, or the SQL Server 2012 database engine for Microsoft Dynamics GP.

Microsoft Dynamics GP CRM requirements

You must be using SQL Server 2012 Reporting Services and Microsoft Dynamics CRM 2011 or later to deploy SQL Server Reporting Services reports and metrics that includes CRM data. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

You must install the Microsoft Dynamics CRM Reporting Extensions on the Microsoft Dynamics GP report server to render reports. Before you render a SQL Server Reporting Services report with CRM data, be sure to start the Microsoft Dynamics CRM application to initialize data.

Configuring Web Server (IIS) role for Reporting Services 2012

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 Web Server (IIS) for Windows Server 2008:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering

Role Service component	Required subcomponent

Performance	Static Content Compression
	IIS Management Console
	IIS 6 Management Compatibility
	   ISS 6 Metabase Compatibility
	   ISS 6 WMI Compatibility
	   ISS 6 Scripting Tools
	   ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

To configure Web Server (IIS) for Windows Server 2008 R2:

1. Open the Server Manager.
    (**Start** > **Administrative Tools** > **Server Manager**)

2. Select the **Roles** node in the Server Manager. The currently installed roles are displayed.

3. In the **Action** menu, choose **Add Roles**. The Add Roles Wizard appears. Click **Next** to continue.

4. In the list of available roles, select the **Web Server (IIS)** role.

5. In the message dialog, click **Add Required Features** to add features required for the Web Server (IIS) role.

6. Click **Next** to continue.

7. Review the information about the Web Server (IIS) role. Click **Next** to continue.

8. In the Select Role Services window, select the following subcomponents for the Web Server role service.

Role Service component	Required subcomponent
Common HTTP Features	Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection
Application Development	ASP.Net .NET Extensibility ISAPI Extensions ISAPI Filters Server Side includes
Health and Diagnostics	HTTP Logging Request Monitor

Role Service component	Required subcomponent
Security	Basic Authorization Windows Authorization Digest Authorization Request Filtering
Performance	Static Content Compression

Management Tools	IIS Management Console
	IIS 6 Management Compatibility
	   ISS 6 Metabase Compatibility
	   ISS 6 WMI Compatibility
	   ISS 6 Scripting Tools
	   ISS 6 Management Console

9. Click **Next**.

10. Review the installation messages, and then click **Install**.

11. After you have viewed the installation results, click **Close**.

12. Select the **Features** node in the Server Manager. The currently installed roles are displayed.

Installing Reporting Services 2012

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 2012, 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 1, "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.

The SQL Server that hosts your Microsoft Dynamics GP data must be using mixed-mode authentication. (Mixed-mode authentication allows you to use either Windows Authentication or SQL Authentication to access the SQL Server.)

To install Reporting Services 2012:

1. Insert the SQL Server 2012 media. The main SQL Server installation screen should appear. If you do not see this screen, browse the media and double-click the setup.exe file.

2. Click **Yes** to make changes to your computer if you are using User Account Control.

3. In the SQL Server Installation Center, click **Installation**.

4. Click **New SQL Server stand-alone installation or add features to an existing installation**.

5. In the Setup Support Rules window, click **OK**.

6. In the Product Updates window, click **Next**.

7. Your computer is scanned for conditions that may cause possible installation problems. To proceed with the installation, click **Next**.

8. In the Installation Type window, select **Add features to an existing instance of SQL Server 2012** and click **Next**.

9. In the Feature Selection window, select Reporting Services – Native or Reporting Services – SharePoint and any other feature you want to install. Click **Next**.

Be sure to select Reporting Services Add-in for SharePoint Products if you are installing on the server where SharePoint is running.

10. In the Installation Rules window, click **Next**.

11. In the Disk Space Requirements window, click **Next**.

12. In the Server Configuration window, specify the service account for SQL Server Reporting Services and click **Next**.

13. In the Reporting Services Configuration window, click **Next**.

    If you are using Native mode, you will have to configure the report server using the Reporting Services Configuration Manager after installing Reporting Services.

    If you are using SharePoint Integrated mode, you will have to use the SharePoint Central Administration to complete the configuration. You'll also verify the SQL Server Reporting Services service is started and create at least one SQL Server Reporting Services service application.

14. In the Error Reporting window, click **Next**.

15. In the Installation Configuration Rules window, click **Next**.

16. In the Ready to Install window, click **Install**.

17. The Installation Progress window appears, allowing you to view the status of the installation. Click **Next** after the installation is completed.

18. In the Complete window, click **Close** to exit the installation wizard.

19. Restart the computer if you are instructed to do so.

Configuring Reporting Services 2012 in Native mode

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.

To configure Reporting Services 2012 in Native mode:

1. Start Reporting Services Configuration Manager.
    (**Start** > **All Programs** > **Microsoft SQL Server 2012** > **Configuration Tools** >
    Reporting Services Configuration Manager)

2. Click **Yes** to make changes to your computer if you are using User Account
    Control.

3. Enter the name of a server and select an instance to connect to a report server
    instance. 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.*

4. 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.

5. In the navigation pane, click **Service Account** to open the page. Be sure that the
    Use the built-in account option is selected.

6. In the navigation pane, click **Web Service URL** to open the Web Service URL
    page. This page allows you to view and change the name of the virtual
    directory used by the Reporting Services Web service.

7. Click **Apply** to create a new virtual directory.

8. In the navigation pane, click **Database** to open the Report Server Database
    page.

9. Click **Change Database**.

10. Select to create a new report server database, and click **Next**.

11. Select Authentication type and specify the user name and password, if
    necessary. Click **Next**.

12. Specify the database name and specify the mode. Click **Next**.

13. Select Authentication type and specify the user name and password for your
    credentials, if necessary. Click **Next**.

14. Verify the database information. Click **Next**.

15. After the database is configured, click **Finish**.

16. Click **Report Manager URL** to open the Report Manager URL page in the
    navigation pane. Click **Apply**.

17. Click **Exit**.

Starting Report Manager

Report Manager is installed during setup on the same computer as the report server. If you selected Native mode for your report server database, you should verify that you can connect to the Report Manager.

To start Report Manager:

1. Open Microsoft Internet Explorer.

2. In the address bar of the Web browser, type the Report Manager URL. By default, the URL is *http://<ComputerName>/Reports.*

Installing the Reporting Services SharePoint service

The SharePoint Integrated mode for Reporting Services uses a SharePoint service. If the SharePoint farm is new, the necessary files were installed as part of the Reporting Services using the SQL Server installation wizard. You still need register service into the SharePoint farm.

You don't need to complete the following steps for an existing SharePoint farm. The Reporting Services SharePoint service was installed and started when you used the SQL Server installation wizard to install Reporting Services.

To install the Reporting Services SharePoint service:

1. Open the Windows PowerShell®.
    Start > **Microsoft SharePoint 2010 Products** > right-click **SharePoint 2010 Management Shell** > click **Run as administrator**

2. Run the following command to install the SharePoint service.

    ```
    Install-SPRSService
    ```

    If the command was successful, a new line appears in the management shell.

3. Run the following command to install the service proxy.

    ```
    Install-SPRSServiceProxy
    ```

Starting the Reporting Services SharePoint service

After installing the Reporting Services SharePoint service, you must start or verify that the service is running.

To start Reporting Services SharePoint service:

1. Open SharePoint Central Administration.
    Start > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**

2. Under the System Settings heading, click **Manage services on server**.

3. Be sure that the SQL Server Reporting Services Service is started. If the service isn't started, click **Start** in the **Action** column.

If the SQL Server Reporting Services Service is not in the list, verify you have installed the service. See *Installing the Reporting Services SharePoint service* on page 49.

Creating a Reporting Services service application

The SharePoint Integrated mode for Reporting Services uses a SharePoint service and one or more service applications. Creating a service application makes the service available and generates the service application database. One service application is sufficient for most deployment configurations, but you can create multiple Reporting Services service applications.

To create Reporting Services service application:

1. Open SharePoint Central Administration.
    Start > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**

2. Under the Application Management heading, click **Manage service applications**.

3. In the SharePoint ribbon, click **New**.

4. In the **New** menu, select **SQL Server Reporting Services Service Application**.

    If the SQL Server Reporting Services Service Application is not in the list, verify you have installed the service. See *Installing the Reporting Services SharePoint service*.

5. In the Create SQL Server Reporting Services Service Application page, enter a name for the application.

6. In Application Pool section, create a new application pool for the application.

7. Select or create a managed account for the application pool. Be sure to specify a domain user account.

    A domain user account allows you to use SharePoint's managed account feature, which allows you to update passwords and account information in one place.

8. In the **Database server** field, accept the current server or enter a different SQL Server.

9. In **Database Name** field, the default value is ReportingService_<guid>, which is a unique database name. If you enter a new value, we recommend that you use a unique database for each service application.

10. In **Database Authentication** option, the default value is **Windows Authentication**. If you choose SQL Authentication, refer to the SharePoint administrator guide for best practices about this authentication type in a SharePoint deployment.

11. In the Web Application Association section, select the web application to be used for access by the current Reporting Services Service Application. You can associate one Reporting Services service application to one web application.

12. Click **OK**.

The service application creation process may take several minutes to complete.

Creating a Reports site in Microsoft SharePoint 2010

If you selected the SharePoint Integrated mode for your report server database, you can store reports in a Microsoft SharePoint 2010 reports library. If you don't have a site in Microsoft SharePoint that serves as a central location to manage Reporting Services reports, create a Reports site.

If you are using Business Portal 5.1 R2 for Microsoft Dynamics GP, you can use the GP Reports Center for your central location.

To create a Reports site in Microsoft SharePoint 2010

1. Type http://<ServerName> in the address field of Internet Explorer.

2. Click the **Site Actions**, and then click **New site**.

3. In the New SharePoint Site page, enter a title and description of the site.

4. Enter the URL name. For example, http://<ServerName>/Reports.

5. Select a template.

6. Choose any other option you want, and then click **Create**.

Creating a Reports Library in Microsoft SharePoint 2010

After creating a Reports site in Microsoft SharePoint, you need to create a reports library. A reports library is a location on the Reports site where you can store your Reporting Services reports.

If you are using Business Portal 5.1 R2 for Microsoft Dynamics GP, you can create the reports library on the GP Reports Center site.

To create a Reports Library in Microsoft SharePoint 2010

1. Type http://<ServerName>/Reports in the address field of Internet Explorer.

2. Click the **Site Actions** menu, and then click **New Document Library**.

3. In the New page, enter a name and a description.

4. Choose any other option you want, and then click **Create**.

5. In the **Library Tools** group, click **Library settings**.

6. Under General Settings in the Document Library Settings page, click **Advanced settings**.

7. In the Advanced settings page, select to allow management of content type.

8. Select **Open in the client application** as the default open behavior for browser-enabled documents.

9. Click **OK**.

10. Under Content types in the Document Library Settings page, click **Document**.

11. Under Settings in Document page, click **Name and description**.

12. In the Settings page, change the name to Reports.

13. Click **OK**.

Configuring Reporting Services Integration

You must specify integration settings that determine the connection between SharePoint and a report server. The settings that you specify are stored in the configuration database. You must be an administrator on the SharePoint farm to configure report server integration. You also must have a target report server that is already connected to a report server database that was created for SharePoint integrated.

If you don't have the SQL Server Reporting Services SharePoint 2010 Add-in installed, the configuration pages and general integration are not available.

To configure Reporting Services Integration:

1. Open SharePoint Central Administration.
   (**Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**)

2. Click **General Application Settings**.

3. Under the Reporting Services heading, click **Reporting Services Integration**.

4. Enter the Report Server Web Service URL. For example, http://<ServerName> /ReportServer).

5. Select **Windows Authentication** as the authentication mode.

6. Enter your credentials and click **OK**.

Activating the Claims to Windows Token Service

Be sure that the Claims to Windows Token Service has been started.

To activate the Claims to Windows Token Service:

1. Open SharePoint Central Administration.
   (**Start** > **Microsoft SharePoint 2010 Products** > **SharePoint 2010 Central Administration**)

2. Under the System Settings heading, click **Manage services on server**.

3. Be sure that the Claims to Windows Token Service is started. If the service isn't started, click **Start** in the **Action** column.

Chapter 7: Deploying Reporting Services reports

This chapter explains how to deploy predefined SQL Server Reporting Services reports that are included in Microsoft Dynamics GP to a server or Microsoft SharePoint site. If you are using SQL Server 2008 Reporting Services or SQL Server 2008 R2 Reporting Services, you also can deploy charts and key performance indicators (KPIs). Once the reports and charts and KPIs are stored on a server or on a Microsoft SharePoint library, users can access them without starting Microsoft Dynamics GP as long as they have the appropriate security access.

Before you deploy Reporting Services reports, be sure that Dexterity Shared Components are installed on the computer.

This chapter includes the following sections.

- *Modify the Report Server web.config file*
- *Using the Reporting Tools Setup window*
- *Deploying SQL Server Reporting Services reports in Native mode*
- *Deploying SQL Server Reporting Services reports in SharePoint Integrated mode*

Modify the Report Server web.config file

To deploy the SQL Server Reporting Services reports, you must modify the Report Server web.config file for the timeout execution and the maximum request length. If you don't update the Report Server web.config file for the timeout execution, you might receive an error that states that "the operation has timed out." If you don't update the Report Server web.config file for the maximum request length, you will receive an error that the deployment has exceeded the maximum request length allowed by the target server.

You must be an administrator to modify the Report Server web.config file.

To modify the Report Server Web.config file:

1. Create a backup copy of the web.config file located in the ReportServer folder. (The ReportServer folder is located in C:\Program Files\Microsoft SQL Server\MSSQLSERVER\Reporting Services\ReportServer where Reporting Services is installed.)

2. Open the Report Server web.config file using a text editor, such as Notepad.

3. Search for <httpRuntime executionTimeout="9000" />.

4. In that line, change executionTimeout="9000" to executionTimeout="19000" and add the value maxRequestLength="20960".

   ```
   (<httpRuntime executionTimeout="19000" maxRequestLength="20960"/>
   ```

5. Save and close the Report Server web.config file.

Using the Reporting Tools Setup window

Use the Reporting Tools Setup window to deploy the predefined SQL Server Reporting Services reports that are available in Microsoft Dynamics GP to the Report Server or to a Microsoft SharePoint library. You also can use the Reporting

Tools Setup window to redeploy reports or deploy reports to a different location. Deploying reports to a new location does not deploy reports from the existing location to the new location. If you are using more than one instance of Microsoft Dynamics GP, you should only deploy reports to the report server for one instance at a time.

Deployment Options   The Deployment Options list has a tree view that displays the deployment status of each company and of each report type. You can select to deploy reports by company and by report type.
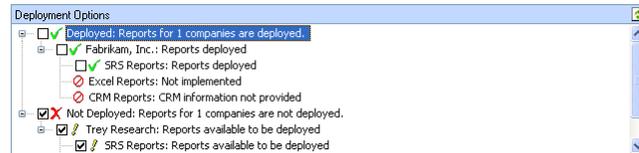
There are three levels in the tree view. You can collapse and expand the entire tree or just portions of it. A check mark next to a level means that the reports are available to deploy. All items that are not fully deployed will automatically be marked.

Redeploy all reports for selected companies   You can mark to redeploy reports for the companies you selected. When you choose the Deploy Reports button, previously deployed reports for the selected companies are overwritten.

Print status of all companies   You can mark this option to print the SQL Server Reporting Services Deployment Status report. The report displays information for all companies. You can choose File > Print to print the report with only information for the company you are currently logged in to.

Refresh button   Choose this button to validate and save the report location information. The Deployment Options tree view is updated based on the report location information.

Deploying SQL Server Reporting Services reports in Native mode

Use the Reporting Tools Setup window to deploy the predefined SQL Server Reporting Services reports that are available in Microsoft Dynamics GP to the Report Server. You also can use the Reporting Tools Setup window to redeploy reports or deploy reports to a different location. If you are using Reporting Services 2008 or Reporting Services 2008 R2, you also can deploy charts and KPIs. If you are using more than one instance of Microsoft Dynamics GP, you should only deploy reports to the report server for one instance at a time.

You must be using Reporting Services 2005 Service Pack 2 or later, Reporting Services 2008, or Reporting Services 2008 R2 to use the predefined SQL Server Reporting Services reports in Microsoft Dynamics GP.

To deploy SQL Server Reporting Services reports in Native mode:

1. Open the Reporting Tools Setup window.
   (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)

2. On the **SQL Reporting Services** tab, select the **Native** mode.
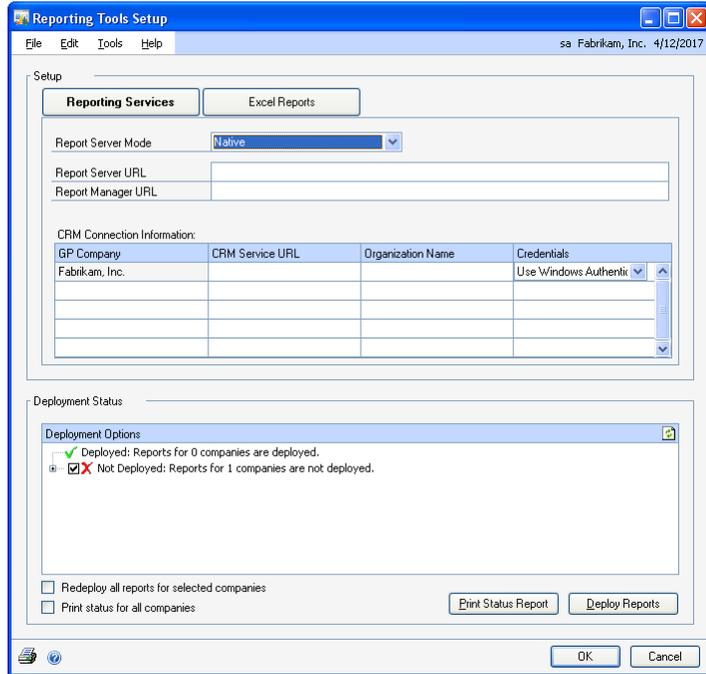
Microsoft Dynamics CRM 2011 supports only the native mode of deployment of Microsoft SQL Server Reporting Services.

3. Enter the following locations for the Native mode. Be sure that your location doesn't end with a slash.

   Native mode location example:

Location	Example
Report Server URL	http://<servername>/ReportServer
Report Manager URL	http://<servername>/Reports

4. If you are using Microsoft Dynamics CRM 2011, enter the URL for the CRM service, the name of the organization, and specify credentials for the data source.

   We recommend that you use Windows Authentication (Integrated Security). If you select to be prompted for credentials, you must mark the Use as Windows credentials when connecting to the data source option on the data source deployed.

You must be using SQL Server 2008 R2 Reporting Services and Microsoft Dynamics CRM 2011 or later to deploy SQL Server Reporting Services reports and metrics that

includes CRM data. Microsoft Dynamics CRM supports only the native mode of deployment of SQL Server Reporting Services.

5. To verify your locations, choose the **Refresh** button in the upper right hand corner of the Deployment Options tree view.

6. In the Deployment Options tree view, all items that are not fully deployed are automatically marked.

    To exclude an item, unmark the check box. For example, if you don't want to deploy Reporting Services reports in Fabrikam, Inc., expand the Company level in the tree view and unmark SRS Reports.

7. Choose **Deploy Reports** to deploy reports.

    The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.
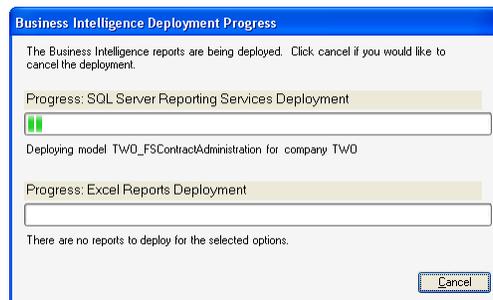
    If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

8. After the reports are deployed, choose **Print Status Report** to view the deployment status of reports.

Deploying SQL Server Reporting Services reports in SharePoint Integrated mode

Use the Reporting Tools Setup window to deploy the predefined SQL Server Reporting Services reports that are available in Microsoft Dynamics GP to a Microsoft SharePoint library. You also can use the Reporting Tools Setup window to redeploy reports or deploy reports to a different location. If you are using Reporting Services 2008 or Reporting Services 2008 R2, you also can deploy charts and KPIs. If you are using more than one instance of Microsoft Dynamics GP, you should only deploy reports to the report server for one instance at a time.

You must be using Reporting Services 2008, or Reporting Services 2008 R2 to use the predefined SQL Server Reporting Services reports in Microsoft Dynamics GP.

To deploy SQL Server Reporting Services reports in SharePoint Integrated mode:

1. Open the Reporting Tools Setup window.
   (**Microsoft Dynamics GP menu** > **Tools** > **Setup** > **System** > **Reporting Tools Setup**)

2. On the **SQL Reporting Services** tab, select the **SharePoint Integrated** mode.
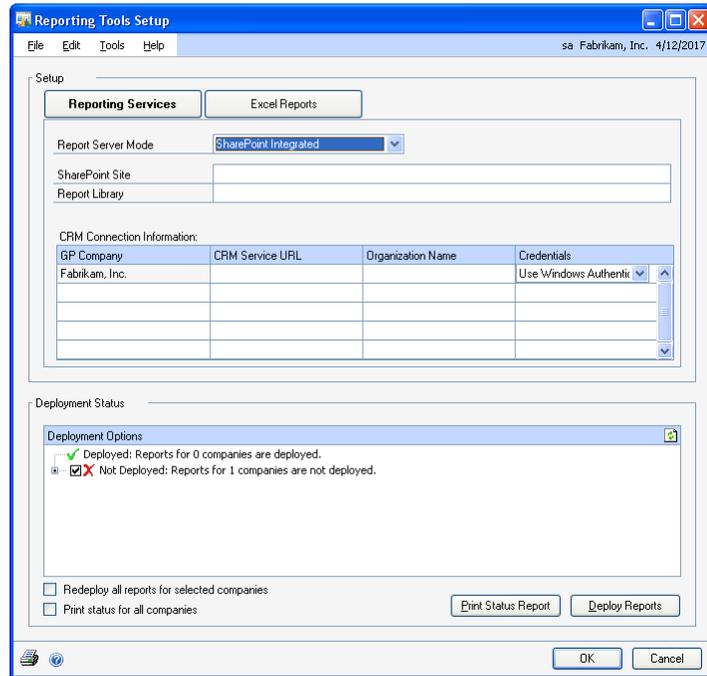
3. Enter the locations for the SharePoint site and report library. Be sure that your location doesn't end with a slash.

   SharePoint Integrated mode location example:

SharePoint Integrated	
Location	**Example**
SharePoint Site	http://<servername>/SharePoint site
Report Library	ReportsLibrary

Microsoft Dynamics CRM 2011 supports only the native mode of deployment of Microsoft SQL Server Reporting Services.

4. To verify your locations, choose the **Refresh** button in the upper right hand corner of the Deployment Options tree view.

5. In the Deployment Options tree view, all items that are not fully deployed are automatically marked.

   To exclude an item, unmark the check box. For example, if you don't want to deploy Reporting Services reports in Fabrikam, Inc., expand the Company level in the tree view and unmark SRS Reports.

6. Choose **Deploy Reports** to deploy reports.

    The Business Intelligence Deployment Progress window appears. This window displays the report deployment progress.
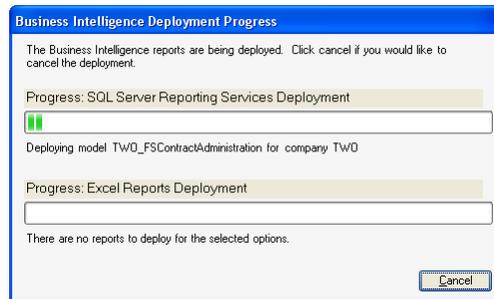
    If you don't have the appropriate permissions to deploy reports, a window opens where you can enter a domain\user name and the password you use to log in to Microsoft Windows.

7. After the reports are deployed, choose **Print Status Report** to view the deployment status of reports.

Chapter 8: 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.

If you deployed reports to Microsoft SharePoint, you can use Microsoft SharePoint security to grant access to report server items that you access from SharePoint sites and libraries. SharePoint security is similar to how role assignments are used in a native mode report server deployment, where a role assignment maps a user or group account to a set of tasks related to an item.

This chapter has the following sections.

- *Designing Reporting Services security*
- *Granting access to the Reporting Services Web site*
- *Database security setup*
- *SharePoint Security for Reporting Services*
- *Creating a permission level in SharePoint 2010*
- *Creating a new group in SharePoint 2010*
- *Granting a group access to a site in SharePoint 2010*
- *Adding users to a group in SharePoint 2010*

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 to the Web site using SQL Server Management Studio or the Report Manager.

To grant access from the Report Manager using Reporting Services 2005:

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*.

2. Click **Site Settings** on the home page.

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

3.   In the Security section, click **Configure site-wide security**.

4.   To enable access for a new user or group, click **New Role Assignment**.

5.   Enter the name of the user or group account.

6.   Select one or more system role definitions to use with this assignment.

7.   Click **OK**.

8.   Click **Home** to open the Home page.

9.   Click the **Properties** tab.

10. Click **New Role Assignment** to open the New Role Assignment page.

11. Enter the name of the user or group account.

12. 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 Report Manager using Reporting Services 2008:

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*.

2.   Click **Site Settings** on the home page.

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

3.   In the Site Settings page, click **Security**.

4.   To enable access for a new user or group, click **New Role Assignment**.

5.   Enter the name of the user or group account.

6.   Select one or more system role definitions to use with this assignment.

7.   Click **OK**.

8.   Click **Home** to open the Home page.

9.   Click the **Properties** tab.

10. Click **New Role Assignment** to open the New Role Assignment page.

11. Enter the name of the user or group account.

12. 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 Report Manager using Reporting Services 2008 R2 or 2012:

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*.

2. Click **Site Settings** on the home page.

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

3. In the Site Settings page, click **Security**.

4. To enable access for a new user or group, click **New Role Assignment**.

5. Enter the name of the user or group account.

6. Select one or more system role definitions to use with this assignment.

7. Click **OK**.

8. Click **Home** to open the Home page.

9. Click the **Folder Settings** tab.

10. Click **New Role Assignment** to open the New Role Assignment page.

11. Enter the name of the user or group account.

12. Select select one or more roles until the combined set of tasks describe the actions that the user should be allowed to perform.

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 have in relation to the item.

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 database roles for reports, download MDGP11R2_SRS_Report_Roles.pdf (https://mbs2.microsoft.com/fileexchange/?fileID=29588511-77d5-4eef-b5e1-f3dd5b30632b). (CustomerSource login required.)

Users might see reports listed in a browser, but they cannot view the data on the reports until security access has been granted in SQL Server.

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 Windows domain users or groups in SQL Server:

1. Open SQL Server Management Studio.
    (**Start** > **All Programs** > **Microsoft SQL Server** > **SQL Server Management Studio**)

2. Select **Database Engine**, enter the name of server, and enter authentication information. 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 that are required.

    To review what database roles for reports, download To review what database roles for reports, download MDGP11R2_SRS_Report_Roles.pdf (https://mbs2.microsoft.com/fileexchange/?fileID=29588511-77d5-4eef-b5e1-f3dd5b30632b). (CustomerSource login required.)

14. Click **OK**.

SharePoint Security for Reporting Services

You can use Microsoft SharePoint security to grant access to report server items that you access from SharePoint sites and libraries. SharePoint security is similar to how role assignments are used in a native mode report server deployment, where a role assignment maps a user or group account to a set of tasks related to an item. The policies of SharePoint security map a user or group account with a permission level.

SharePoint groups and permission levels are defined at the site collection level and are inherited from the parent object by default. A SharePoint group is a set of users that can be managed together. Permission levels are collections of permissions that allow users to perform a set of related tasks.

If you already assigned permissions to users, those same users will have access to report server items and operations immediately after you configure the integration settings between SharePoint and a report server. You can use existing permissions to upload report definitions and other documents, view reports, create subscriptions, and manage items.

If you have not assigned permissions, you can assign user and group accounts to predefined SharePoint groups or create new permission levels and groups, or modify existing ones to vary server access permissions as the need arise.

Creating a permission level in SharePoint 2010

Permission levels are used globally throughout a site. If you create a new permission level, it will be available to other site owners. You may want to create a permission level for users who aren't administrators so they can view reports in the document library.

To create a permission level in SharePoint 2010:

1. Verify that you have one of the following administrative credentials:

    -   You are a member of the Administrators group for the site collection.
    -   You are a member of the Owners group for the site.
    -   You have the Manage Permissions permission.

2. On the Site Settings page, under Users and Permissions, click **Site permissions**.

3. In the Manage section of the ribbon, **click Permission Levels**.

4. On the toolbar, click **Add a Permission Level**.

5. On the Add a Permission Level page, enter a name for the new permission level. For example, Read Reports.

6. Enter a description of the new permission level.

7. In the list of permissions, select the check boxes to add permissions to the permission level. Be sure to select the following permissions.

Type	Permissions
List Permission	Edit Items View Items Open Items
Site Permission	View Pages Browse User Information Use Remote Interfaces Open

8. Click **Create**.

Creating a new group in SharePoint 2010

A SharePoint group is a set of users that can be managed together. You may want to create a group for users who aren't administrators so they can view reports in the document library.

To create a group, you need to have the Manage Permissions level for the site or content you are working with. To see if you have Manage Permissions permissions level, click the **Site Actions** menu and look for the **Site Permissions** option. If you don't have the option, you don't have the permission to manage permissions.

To create a new group in SharePoint 2010:

1. On the **Site Actions** menu, click **Site Permissions**.

2. On the **Permission Tools** tab, click **Create Group**.

3. On the Create Group page, in the Name and About Me Description section, specify the name and optionally a description for this security group.

4. In the Owner section, specify the owner of this security group.

5. In the Group Settings section, specify who can view and edit the membership of this group.

6. In the Membership Requests section, specify the settings that you want for requests to join or leave the group.

7. Click **Create**.

Granting a group access to a site in SharePoint 2010

To grant a group access to a SharePoint, you need to have the Manage Permissions level for the site or content you are working with. To see if you have Manage Permissions permissions level, click the **Site Actions** menu and look for the **Site Permissions** option. If you don't have the option, you don't have the permission to manage permissions.

To grant a group access to a site in SharePoint 2010:

1. On the **Site Actions** menu, click **Site Permissions**.

2. Click **Grant Permissions**.

3. In the **Grant Permissions** window, enter the names of the groups (or users) to whom you want to grant access to your site.

4. If you enter the names of users, you can add them to an existing group. (You can grant permissions to individual users directly. However, the cost of maintaining a system such as that adds up quickly.)

5. Click **OK**.

Adding users to a group in SharePoint 2010

To add users to a group, you need to have the Manage Permissions level for the site or content you are working with. To see if you have Manage Permissions permissions level, click the **Site Actions** menu and look for the **Site Permissions** option. If you don't have the option, you don't have the permission to manage permissions.

To add users to a group in SharePoint 2010:

1. On the **Site Actions** menu, click **Site Permissions**.

2. On the permissions page, click the link for the security group to which you want to add users.

3. On the People and Groups - Group Name page, on the **New** menu, click **Add Users**.

4. In the **Grant Permissions** window, use the **browse** button to select the users that you want to add to this security group.

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