

Configuring Reporting Services

The Reporting Services use Folders to organize Reports. The Aras Innovator integration with Reporting Services use as the default **Innovator Reports** Folder.

In this section, we configure the Reporting Services using the Report Manager by adding the **Innovator Reports** Folder and a Shared Data Source, which the Reports use to connect to the database.

Installing Reporting Services

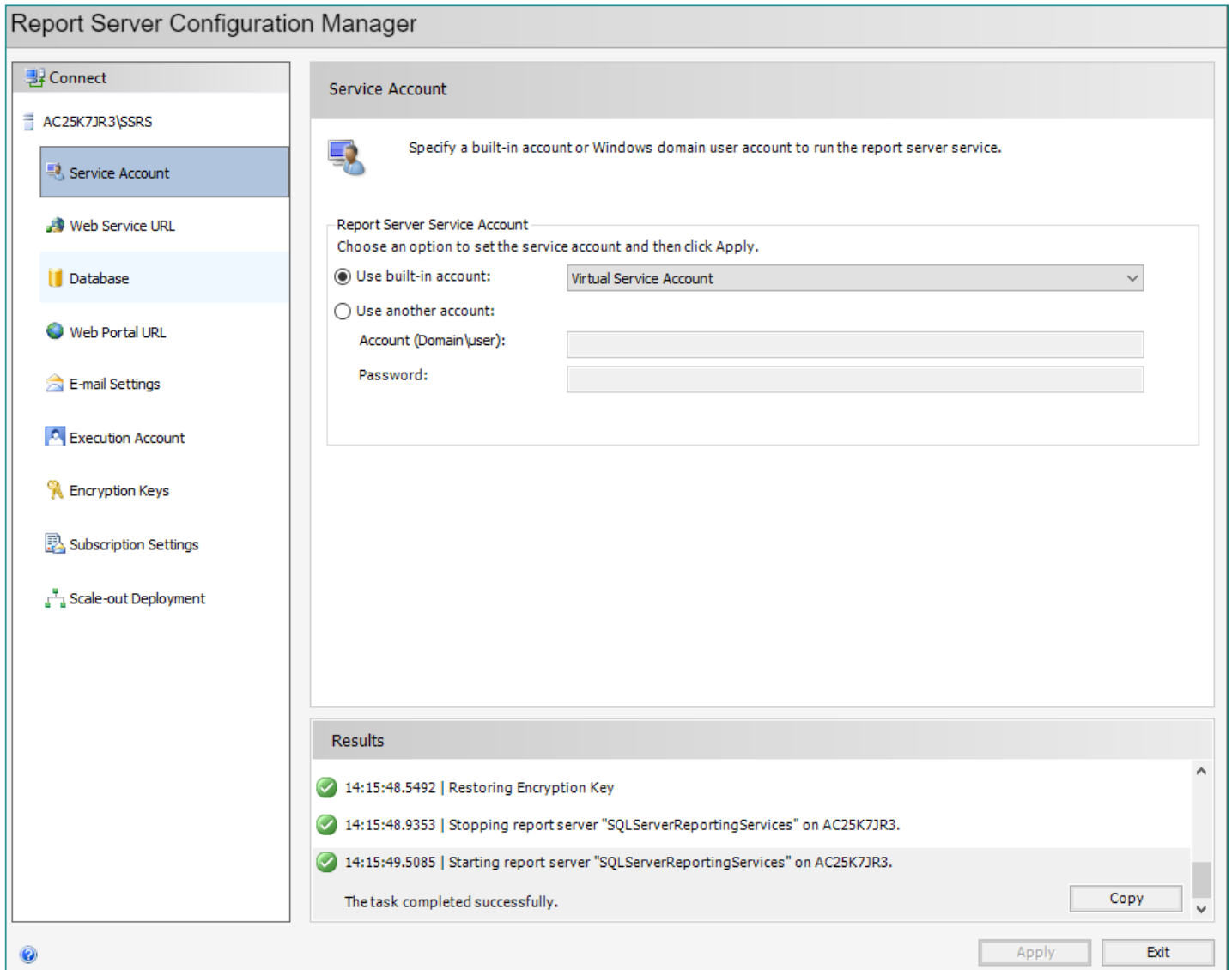
The **ReportServer** Reporting Services comes with the **Report Manager** page used to configure the Reports, Folders, Data Sources, and so on. This page has been integrated into Innovator client via an Innovator Report that opens the **Report Manager** page.

Open your browser with <http://localhost:80/Reports> on the default installation.

To set up Reporting Services:

1. Open the Reporting Services Configuration Manager.
2. Set up a Service Account.





3. Set up a Web Service URL



Report Server Configuration Manager

Connect

AC25K7JR3\SSRS

Service Account

Web Service URL

Database

Web Portal URL

E-mail Settings

Execution Account

Encryption Keys

Subscription Settings

Scale-out Deployment

Web Service URL

Configure a URL used to access the Report Server. Click Advanced to define multiple URLs for a single Report Server instance, or to specify additional parameters on the URL.

Report Server Web Service Virtual Directory

Virtual Directory: ReportServer

Report Server Web Service Site identification

IP Address: All Assigned (Recommended)

TCP Port: 80

HTTPS Certificate: (Not Selected)

HTTPS Port:

Advanced...

Report Server Web Service URLs

URLs: <http://AC25K7JR3:80/ReportServer>

Results

Copy

Apply

Exit

4. Set up the Database.

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The logo for Aras Corporation, featuring a stylized red 'A' composed of several intersecting lines.

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Report Server Configuration Manager

Connect

AC25K7JR3\SSRS

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Report Server Database

The report server stores all report server content and application data in a database. Use this page to create or change the report server database or update database connection credentials.

Current Report Server Database

Click Change database to select a different database or create a new database.

SQL Server Name:AC25K7JR3

Database Name:ReportServer

Report Server Mode:Native

Change Database

Current Report Server Database Credential

The following credentials are used by the report server to connect to the report server database. Use the options below to choose a different account or update a password.

Credential:Service Account

Login:NT SERVICE\SQLServerReportingServices

Password:*****

Change Credentials

Results

Copy

Apply

Exit

5. Set up the Web Portal URL.

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The Aras logo, consisting of a stylized red 'A' made of multiple overlapping lines.

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Report Server Configuration Manager

Connect

AC25K7JR3\SSRS

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Web Portal URL

Configure a URL to access Web Portal. Click Advanced to define multiple URLs, or to specify additional parameters on the URL.

Web Portal Site Identification

Virtual Directory:Reports

URLs:<http://AC25K7JR3:80/Reports>

Advanced

Results

17:27:46.9257 | Stopping report server "SQLServerReportingServices" on AC25K7JR3.

17:27:47.4899 | Starting report server "SQLServerReportingServices" on AC25K7JR3.

The task completed successfully.

Copy

Apply

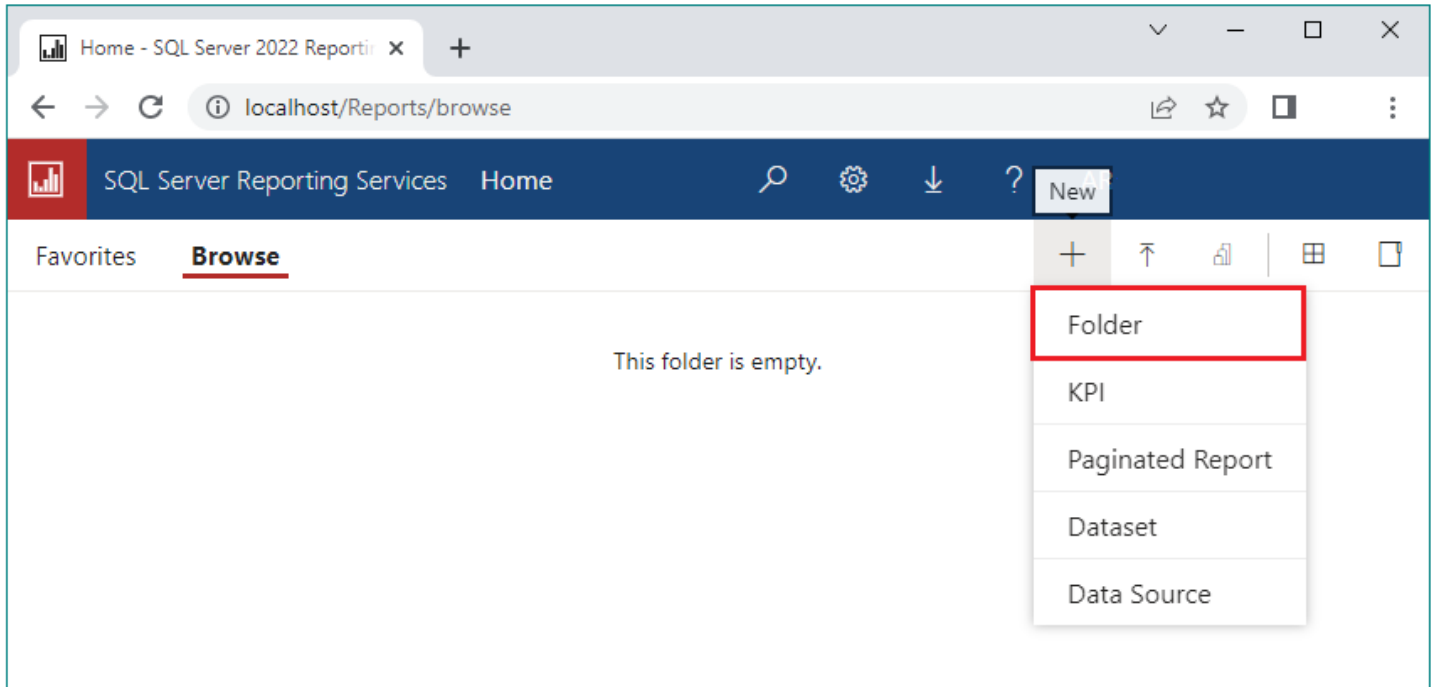
Exit

Setting Up the Report Folder

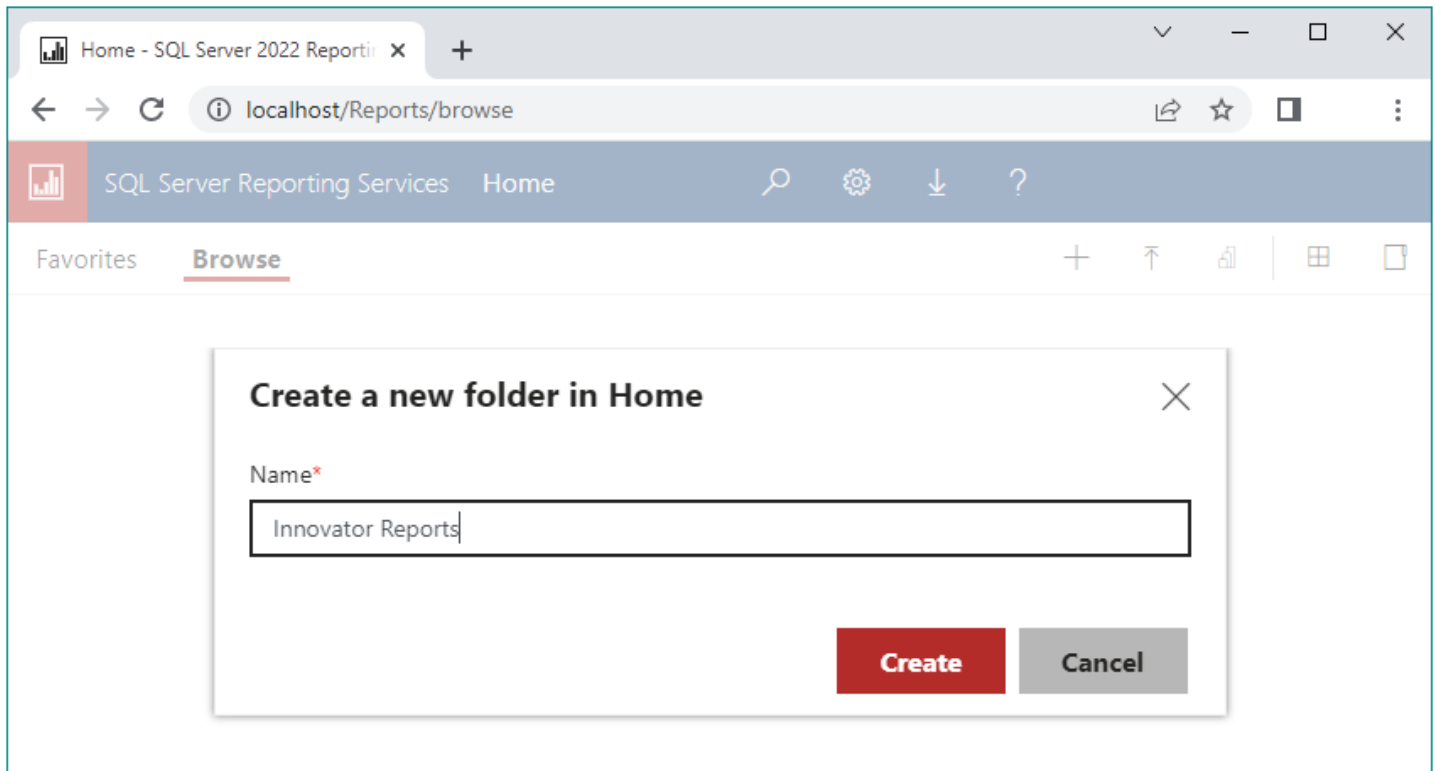
Open the Report Manager page (defined above) in a new dialog.

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1. Click **+** and then **Folder**.
2. Enter **Innovator Reports** for the name and click **Create**.



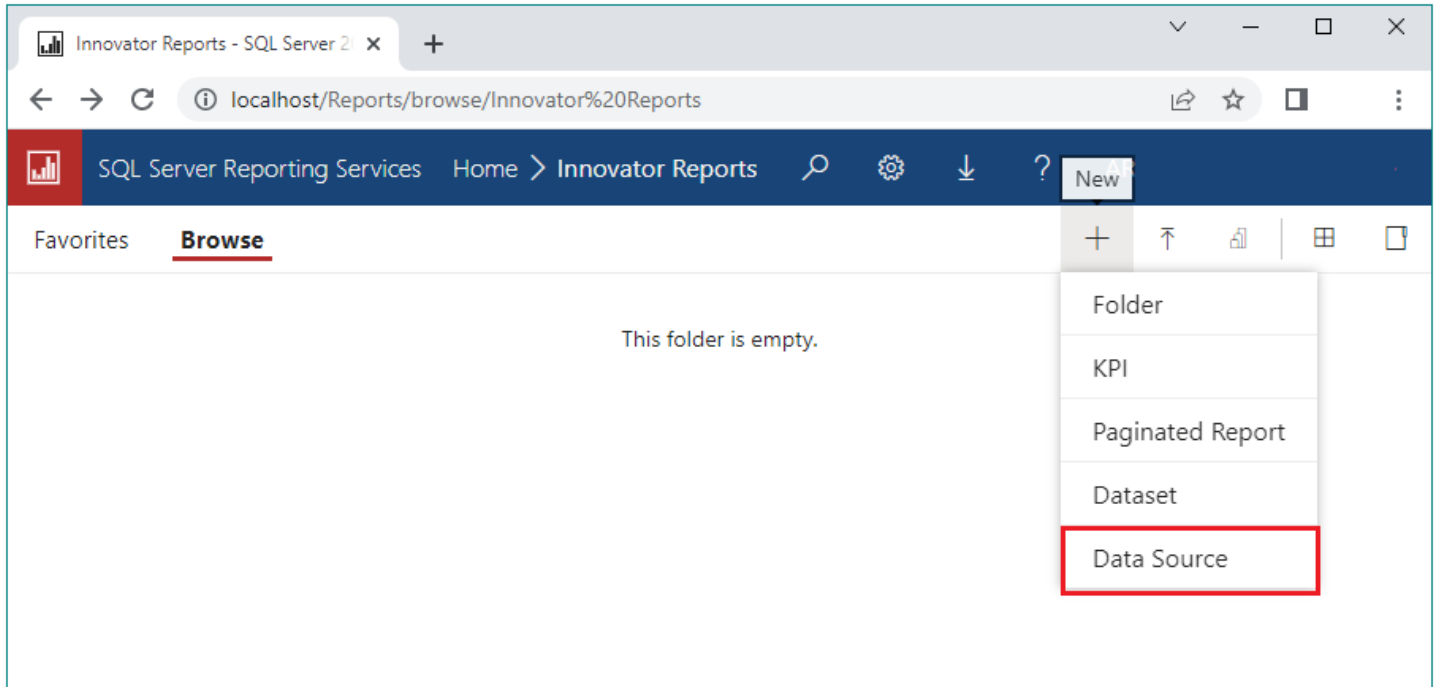
Important

If you use a folder named something other than **Innovator Reports**, you need to change the **Report Server Folder** variable in the database as well in TOC --> **Administration** --> **Variables**. The default value for this is **Innovator Reports**, but it can be customized for each database. For the purposes of these instructions, we assume the default value is used.

Adding a Shared Data Source

Once you add the **Innovator Reports** Folder, navigate into it by clicking on the link. Now, you add a Shared Data Source for the Reports to use to connect to the database.

1. Click **+** and then **Data Source** inside the **Innovator Reports** folder.



The **New data source** dialog appears.



New data source - Innovator Rep x +

localhost/Reports/create/catalogitem/datasource/Innovator%20Reports?_pk=hgd0g800

SQL Server Reporting Services ... > New data source

Properties

Name*

Required. Cannot contain any of the following characters: / @ \$ & * + = < > ; , ' ? | \

Description

☐ Hide this item ☒ Enable this data source

Connection

Type

Microsoft SQL Server

Connection string [Learn more](#)

Credentials

Log into the data source

☒ As the user viewing the report

i Your organization must have specific security infrastructure in place for this option to work. [Learn more](#)

2. Enter **innovator_regular** for the Data Source Name.



Important

By using this same name for both the development and production servers, exporting and importing Reports becomes simpler because there is no need to reassign the Data Source for the Reports you import.

3. Enter the following for the Connection String replacing the values for the two parameters with the actual server name where SQL Server is installed as well as the actual database name.

```
data source=<SQLServerName>;initial catalog=<InnovatorDatabase>  
e.g.  
data source=MyServer\MSSQLSERVER2019;initial catalog=InnovatorSolutions
```

4. Select the **Using the following credential** choice for the **Connect Using** field and enter the **DB Client Login** credentials for your database.
5. Click **Create** to deploy the shared Data Source.

Adding Reporting Services User and Role

The entry point for the Microsoft Reporting Services is the ReportServer.asmx file. The same Web Service is used to request Reports and administer the Report Server. The Web Service is configured by default to use Windows Authentication. You can't simply open the security for anonymous Web users because that would open the Report Manager as well. This security model requires the User be authenticated when they request Reports. A dialog opens requesting the user's login credentials the first time they request a Report each time the browser is opened again. When requesting the Report from within Aras Innovator this would not be desirable. Users would not only have to constantly provide login credentials to access reports, but each Innovator user would also have to have either a domain or local user access on the server. To handle this problem, Aras provides the Innovator Reporting Services Gateway that processes requests to Reporting Services. This gateway uses one shared User Account for all Report requests. The Gateway submits the actual Report request using this shared User Account and propagates the results back to the client. The Report renders without the authentication dialog appearing. If the user attempts to view the Report directly outside Aras Innovator, they still see the authentication dialog as normal. So, users can only view the Reports through Aras Innovator. The local User Account on the server by default is named 'Reporting' with a default password is 'reporting' and must be mapped as a Role in the Report Server.

Add User Account for Reporting



The administrator for the server where Microsoft Reporting Services is installed must add a new Windows User Account named 'Reporting'. Once the User Account is created Aras Innovator needs to be configured to use account credentials.

Configure User Account for On-Premises Innovator instance

Reporting Service configuration is stored in InnovatorServerConfig.xml configuration file. `<ReportingServices>` section needs to be updated with the username and password:

```
<ReportingServices>
<ReportServer>http://localhost/ReportServer/</ReportServer>
<User>Reporting</User>
<Password>reporting</Password>
<Domain>Domain for the above User</Domain>
</ReportingServices>
```

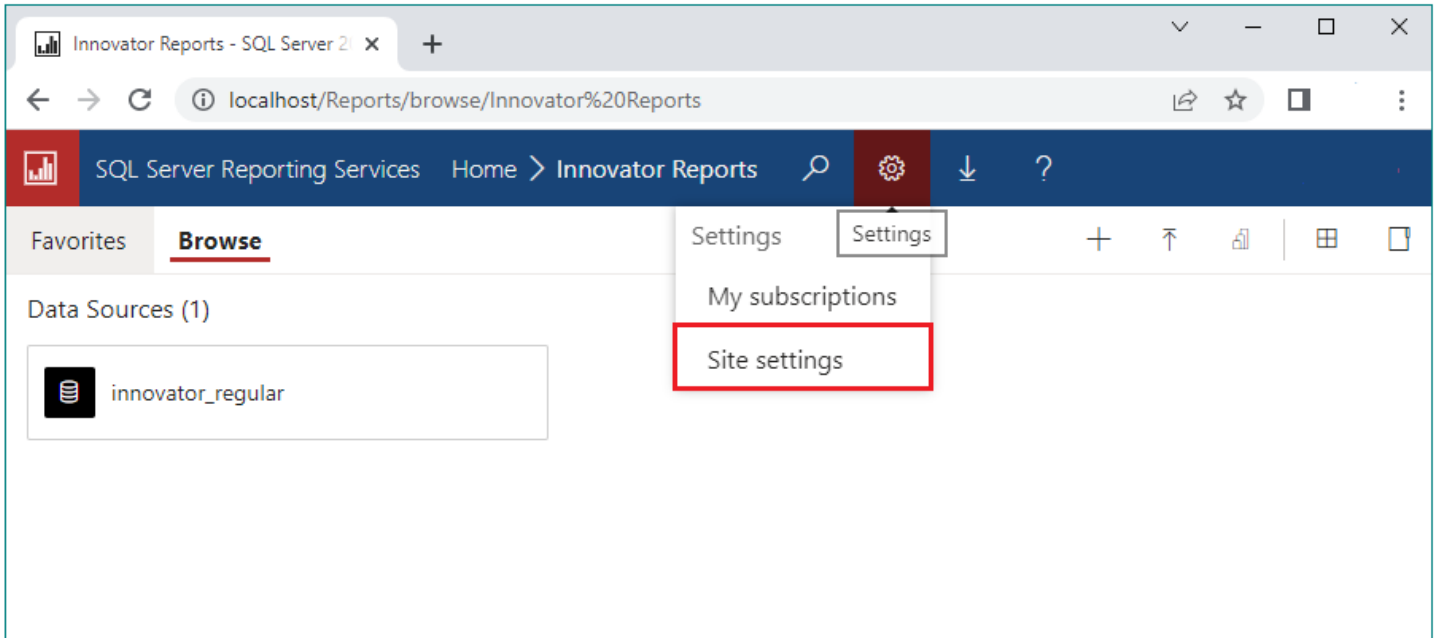
Optional node, `<Domain>`, should contain the domain name you want to use to connect to Reporting services.

Add the Reporting Role

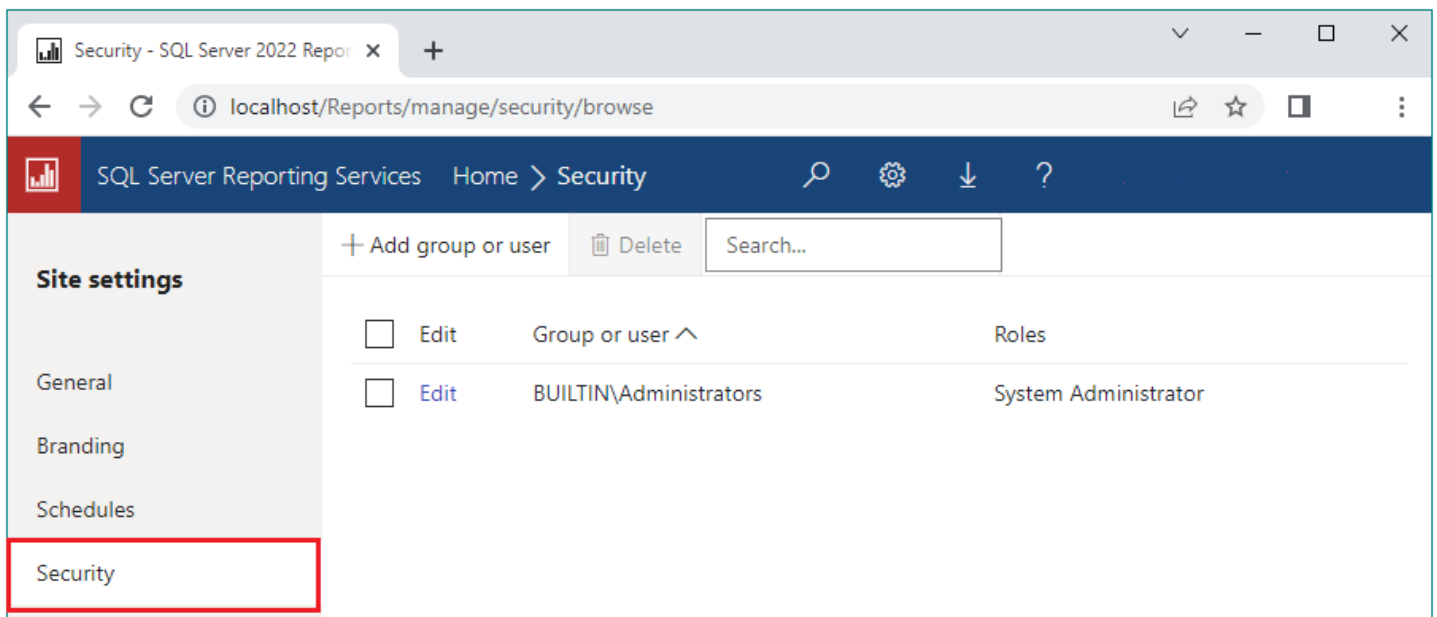
The **Reporting** User Account must next be mapped as a Role in Reporting Services enabling this account Browser privileges.

1. Create the **Reporting** user on the Server.
2. Click the **Site Settings** link in the upper right-hand corner of the **Report Manager** page.



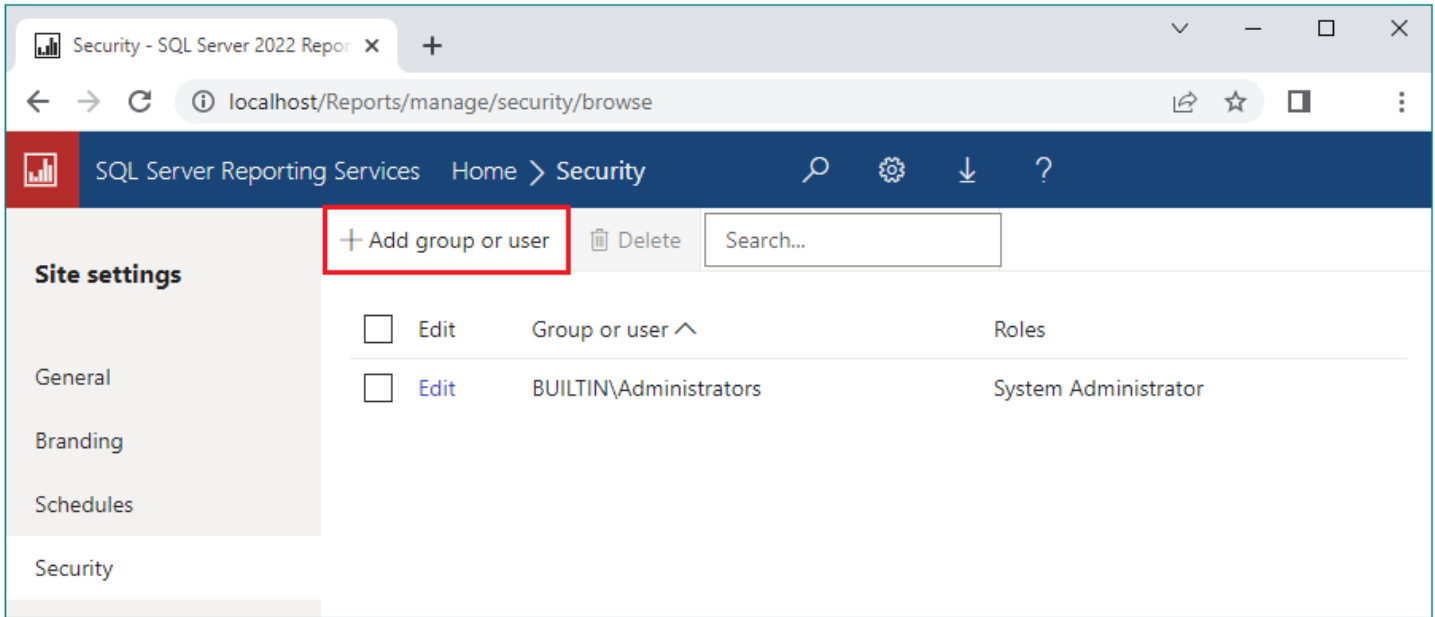


3. Click the **Security** tab.

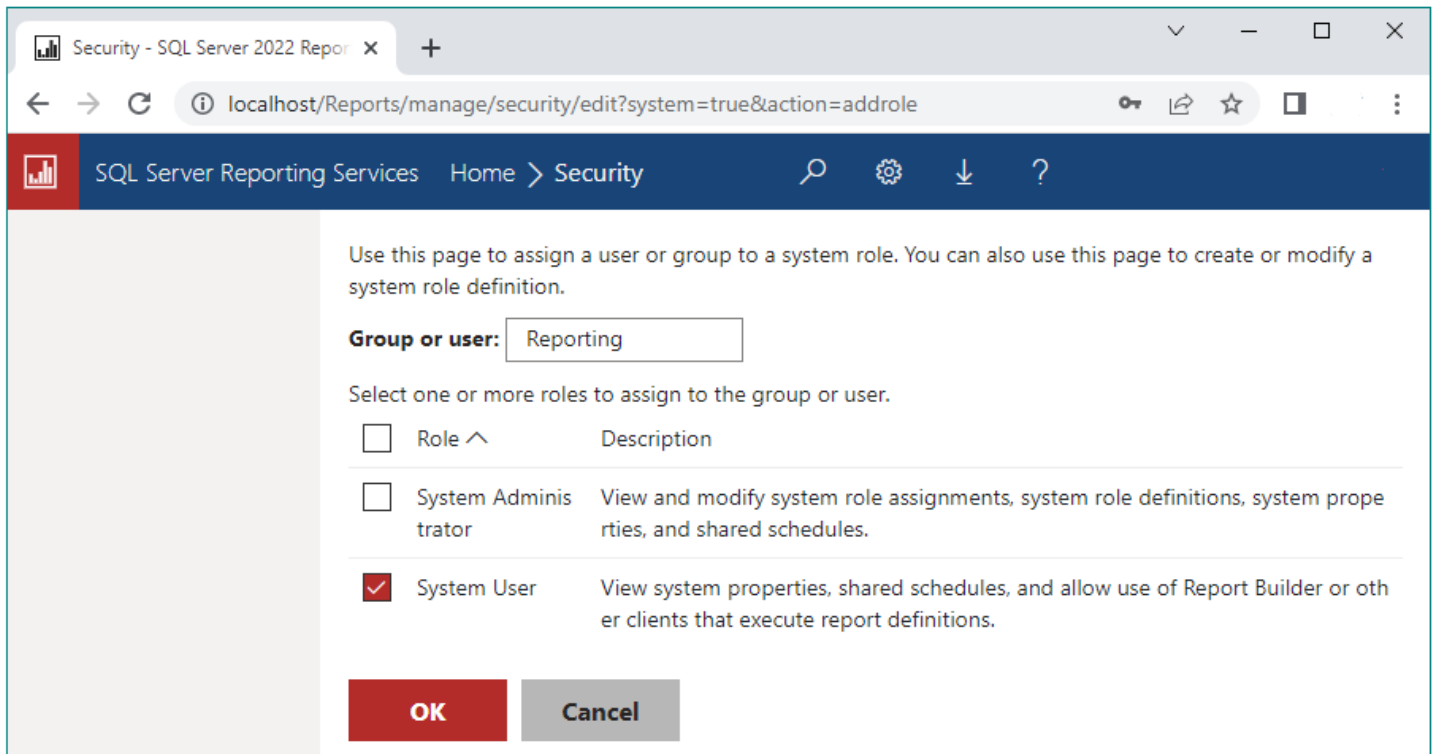


4. Click **Add group or user** to map the **Reporting** User Account as a Reporting Services Role.

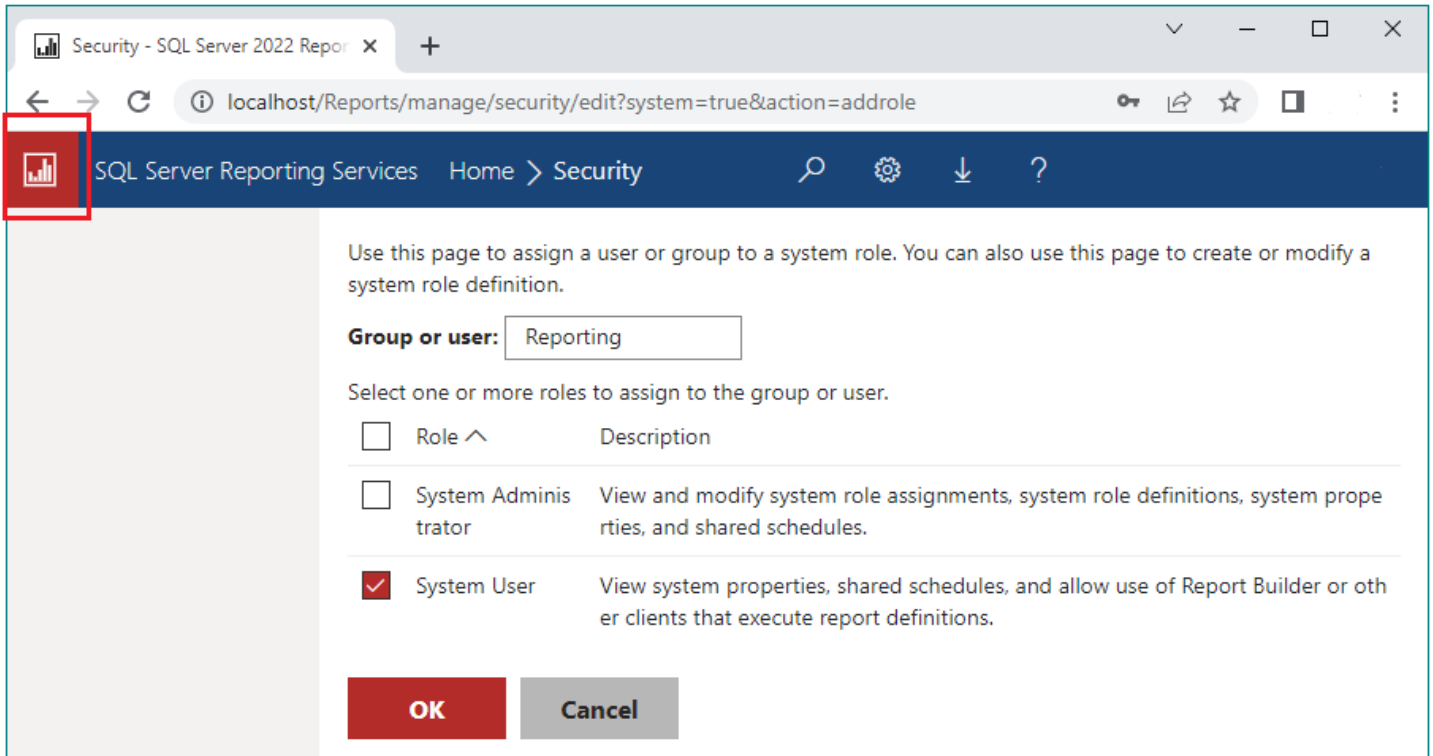




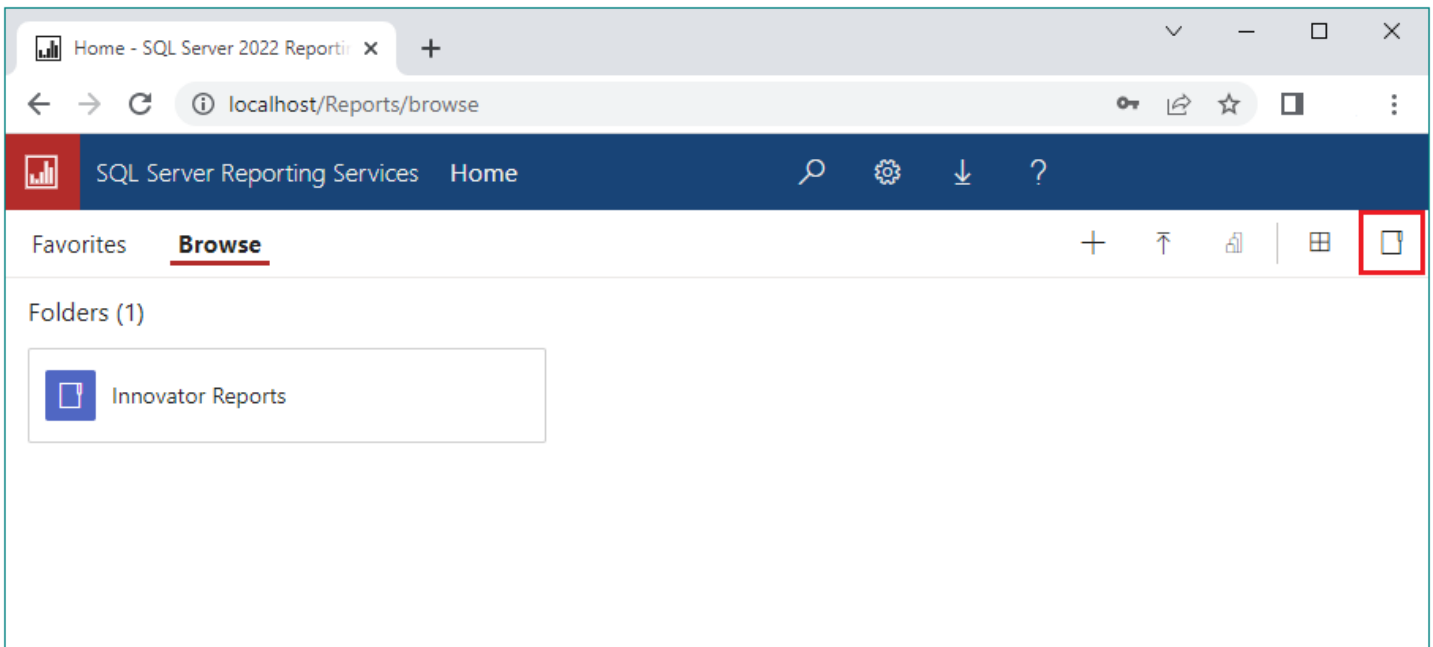
5. Enter the **Reporting** User Account name, select the **System** checkbox, and click **OK** to create the new Role.



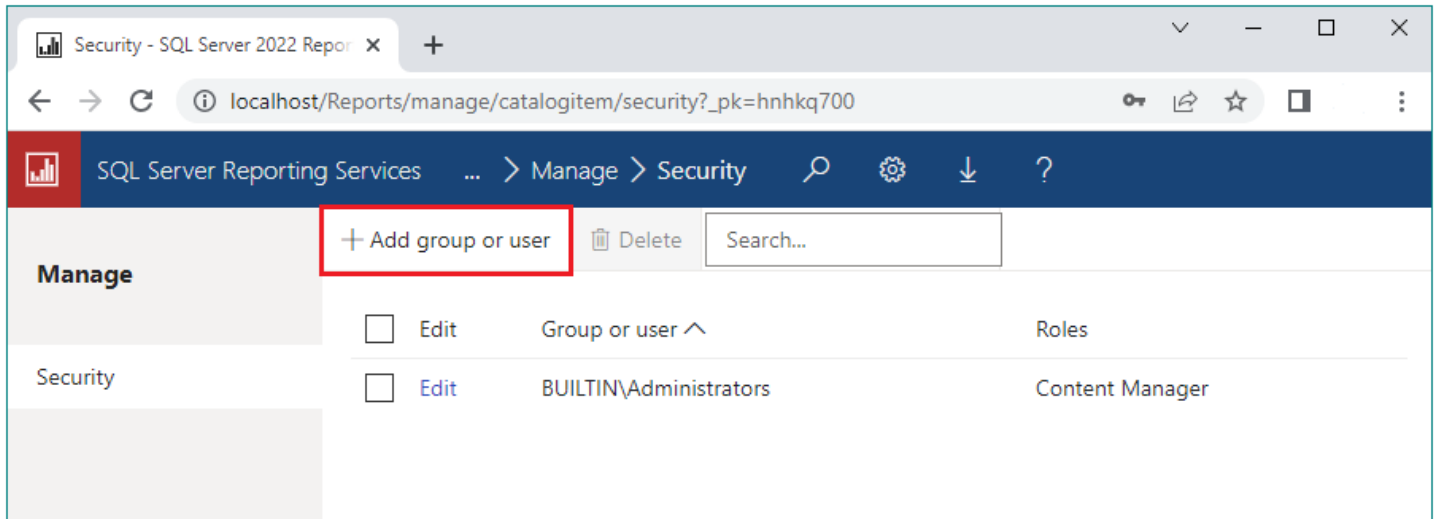
6. Click the **Browse** link in the upper left corner of the page.



Click the Manage Folder link.



7. In the settings tab, click **Add group or user**.



8. Enter **Reporting** in the **Group or user** field, select the **Browser** checkbox, and click **OK** to create a new Role Assignment for the **Innovator Reports** folder.

Security - SQL Server 2022 Repor x +

localhost/Reports/manage/catalogitem/addrole?_pk=hnnbrc00

SQL Server Reporting Services > Security > New Role

Use this page to assign role-based security for **Home**.

Group or user:

Select one or more roles to assign to the group or user.

☐	Role ^	Description
☒	Browser	May view folders, reports and subscribe to reports.
☐	Content Manager	May manage content in the Report Server. This includes folders, reports and resources.
☐	My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folder.
☐	Publisher	May publish reports and linked reports to the Report Server.
☐	Report Builder	May view report definitions.

OK

Cancel

