Exact Synergy Enterprise

# User Guide
# SQL Reporting Server Integration

**258**

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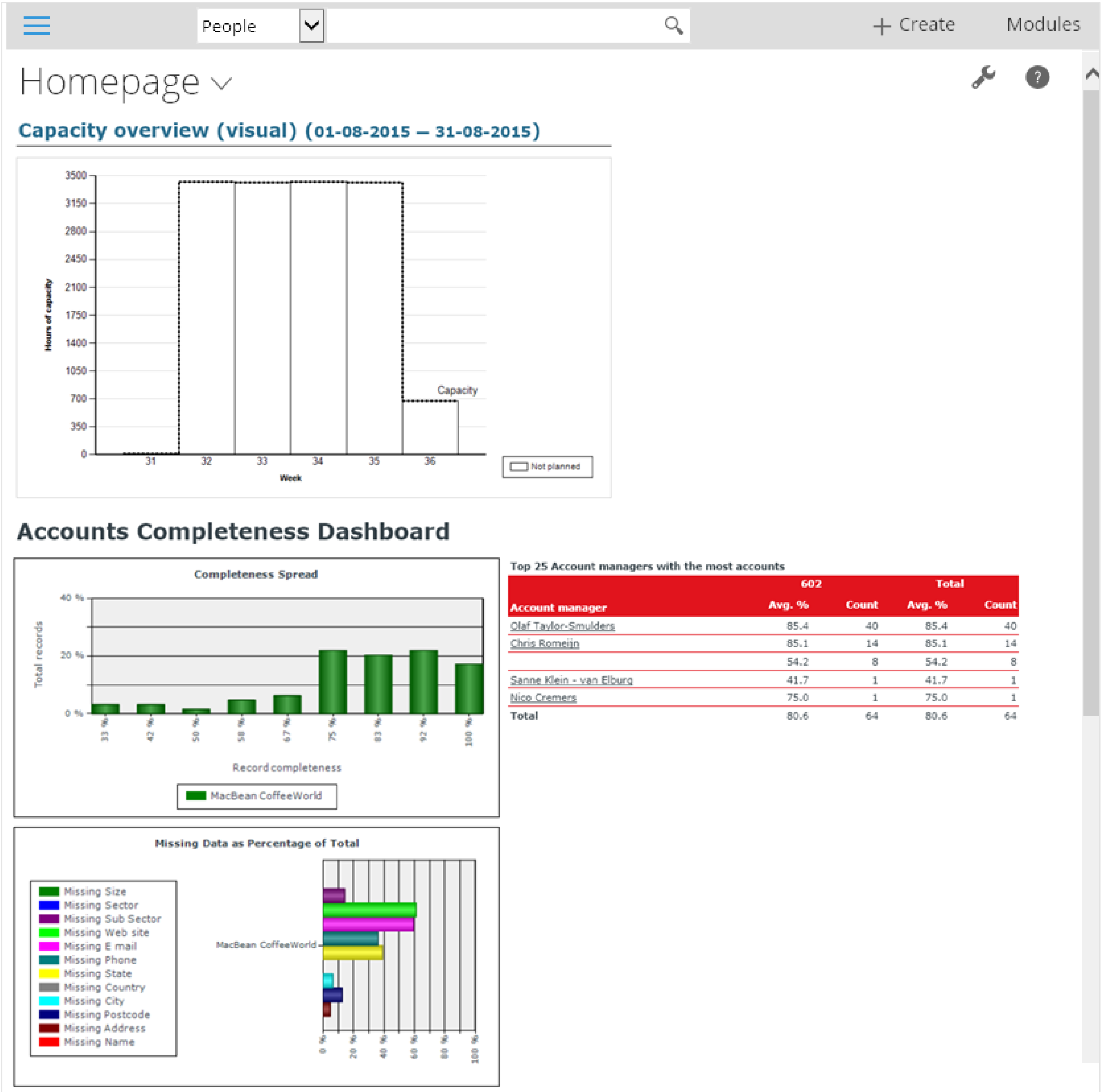
# 1. INTRODUCTION

The integration of Microsoft SQL Server Reporting Services (SSRS) with Exact Synergy Enterprise provides a possibility to view reports that are tailored to the needs of your organization. SSRS enables you to create flexible and graphical web reports to give you the insight you need. With SSRS being a worldwide web reporting tool, many benefits can be gained seamlessly via your Exact Synergy Enterprise application.

**Business benefits:**

- Allows you to store these graphical reports in Exact Synergy Enterprise.
- Enables you to use multiple data sources for these reports.
- Provides the possibility to export the reports to different formats such as PDF, Microsoft Excel, and Microsoft Word.
- Enables you to control the accessibility of certain reports by assigning specific roles.
- Allows you to deploy reports from Exact Synergy Enterprise to a Report Server.
- Allows you to save reports as a document (snapshot) to share with others or use for comparison with results in the future/past.
- Allows you to create your own dashboard.
- Enables you to use Exact Synergy Enterprise entities to link to the report parameters (criteria) in order to display specific information on the report.

The integration allows you to display your reports in your homepage for timely access to valuable enterprise data and in turn, gives you a complete insight to make key decisions. See the following page for an example:



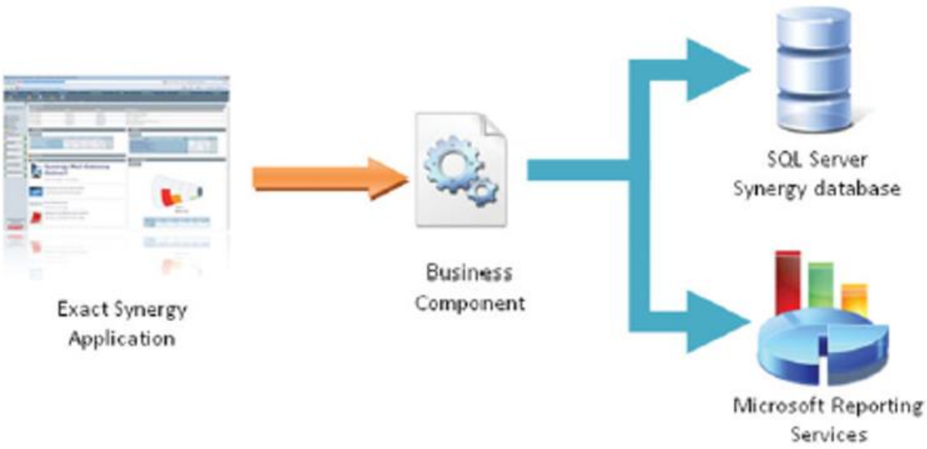

| | 602 | | Total | |
|---|---|---|---|---|
| Account manager | Avg. % | Count | Avg. % | Count |
| Olaf Taylor-Smulders | 85.4 | 40 | 85.4 | 40 |
| Chris Romeijn | 85.1 | 14 | 85.1 | 14 |
| | 54.2 | 8 | 54.2 | 8 |
| Sanne Klein - van Elburg | 41.7 | 1 | 41.7 | 1 |
| Nico Cremers | 75.0 | 1 | 75.0 | 1 |
| Total | 80.6 | 64 | 80.6 | 64 |

For more information on adding reports to your homepage as web parts, see *4.13 Web Parts or Widgets*.

This manual provides a guide to the usage of the integration solution of SSRS with Exact Synergy Enterprise**.**

## 1.1 OVERVIEW

The high level overview of the architecture can be represented in the following diagram:




With the **Report manager** role, you can access the menu paths in Exact Synergy Enterprise to use the application that handles the integration with SSRS. From there, you can create report groups that allow report files to be organized in a structured manner.

All interactions are handled via a business component that passes the data to SSRS and the Exact Synergy Enterprise database that resides on Microsoft SQL Server.

# 2. INSTALLING AND CONFIGURING MICROSOFT SQL SERVER REPORTING SERVICES (SSRS)

Microsoft SQL Server Reporting Services must be installed to generate the **Reporting Services Integration** reports for Exact Synergy Enterprise.

For more information on the system requirements for **Reporting Services Integration**, see System Requirements Reporting Services Integration *(Doc ID:* 21.142.251*)* in Exact Synergy Enterprise.

## 2.1 INSTALLING SSRS

To install SSRS, see *SSRS Installation* at https://www.simple-talk.com/sql/reporting-services/sql-server-reporting-services-basics-building-ssrs-reports/.

**Note:**
From product update 250 onwards, SQL Server 2008 R2 Reporting Services is required to run the reports supplied with the Professional Services Automation solution as well as Exact Globe Next dashboards.

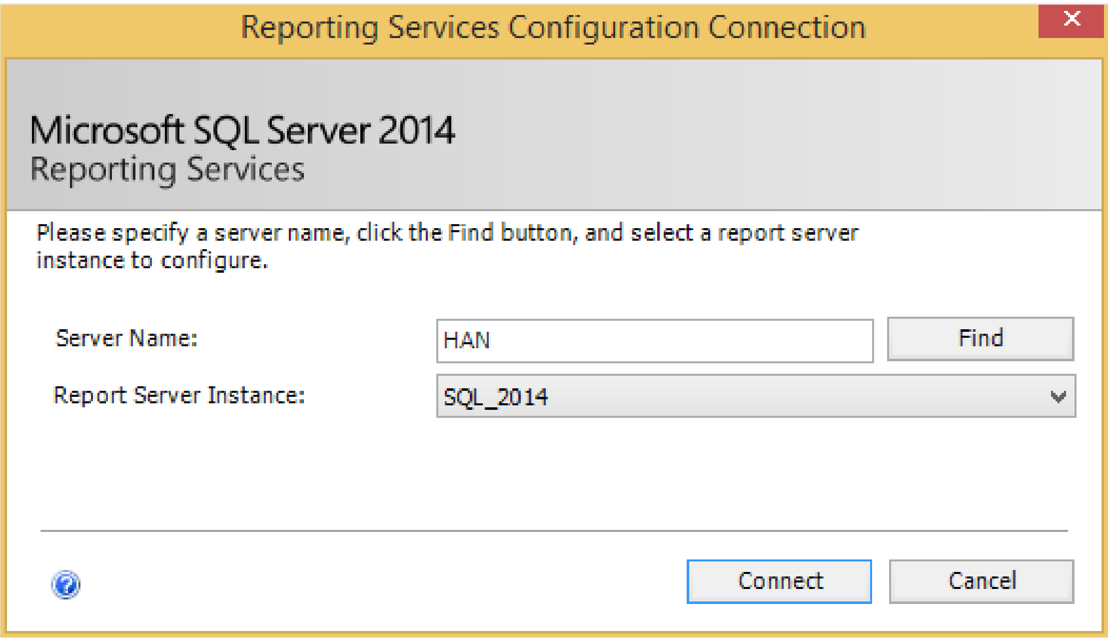
## 2.2 CONFIGURING SQL REPORT SERVER DATABASE CONNECTION

SSRS requires a connection to gain access to the Report Server. You can configure the connection via the Reporting Services Configuration Manager. The following information is necessary to establish a successful connection:

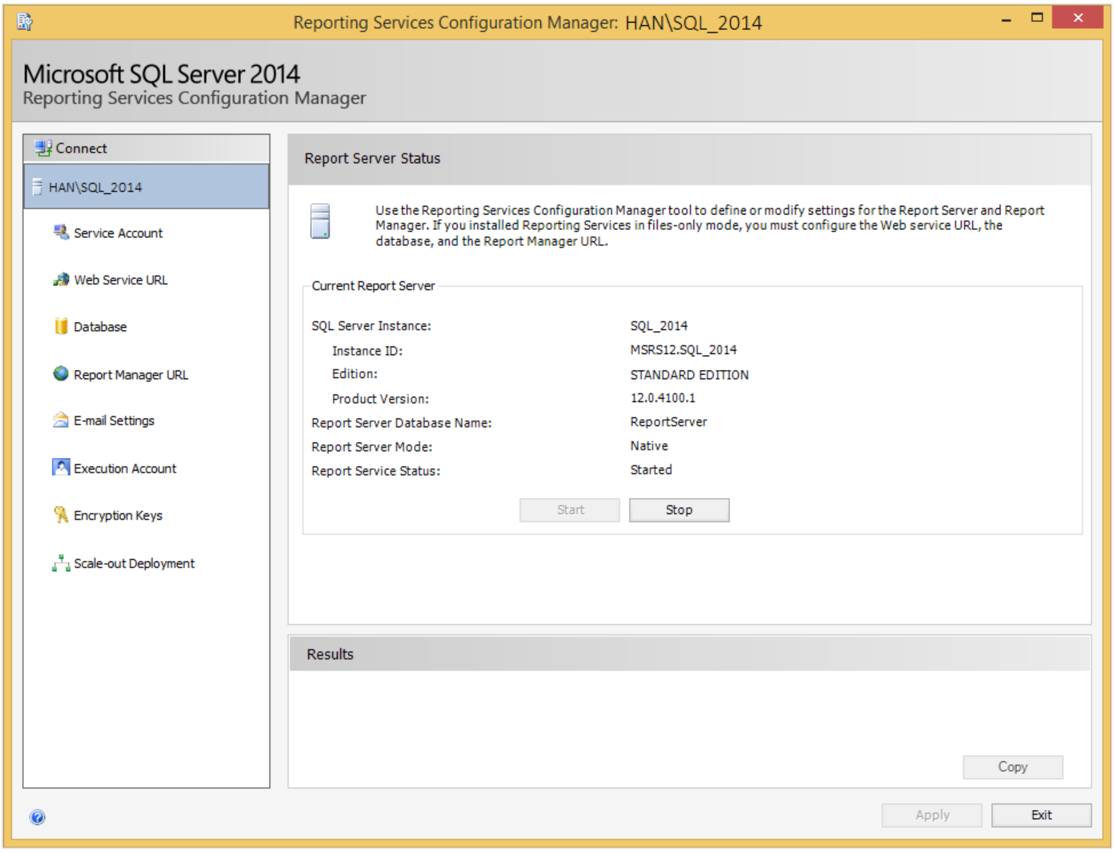
- Name of the database engine instance hosting the Report Server database.
- Name of the Report Server database.
- Credential type, whereby you can choose from the service accounts, a Windows domain account, or an SQL server database login.
- User name and password; these information are required only for a Windows domain account or an SQL server type of login.

**To configure Microsoft Services Configuration Manager in Microsoft SQL Server 2014:**

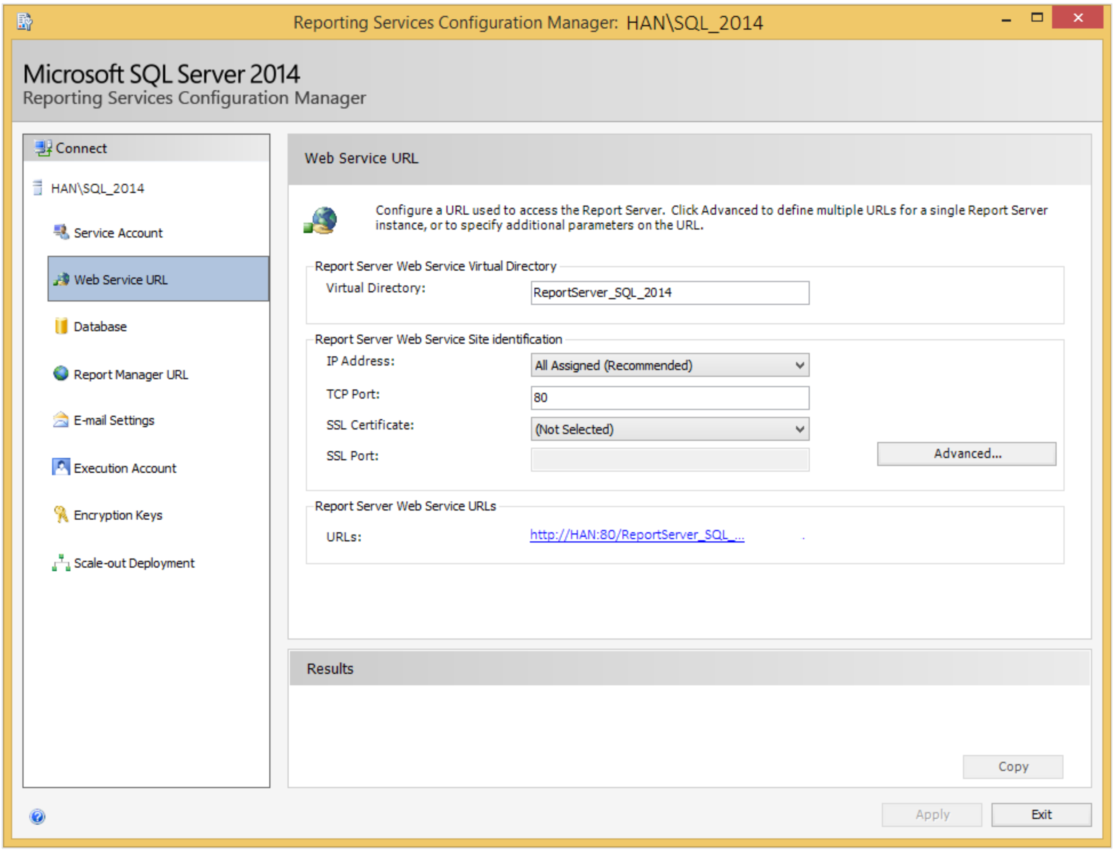
1. Launch the Reporting Services Configuration Manager. The following screen will be displayed.




2. At **Server Name** and **Report Server Instance**, type the names of the server and instance, and then click **Connect**. The following screen will be displayed:

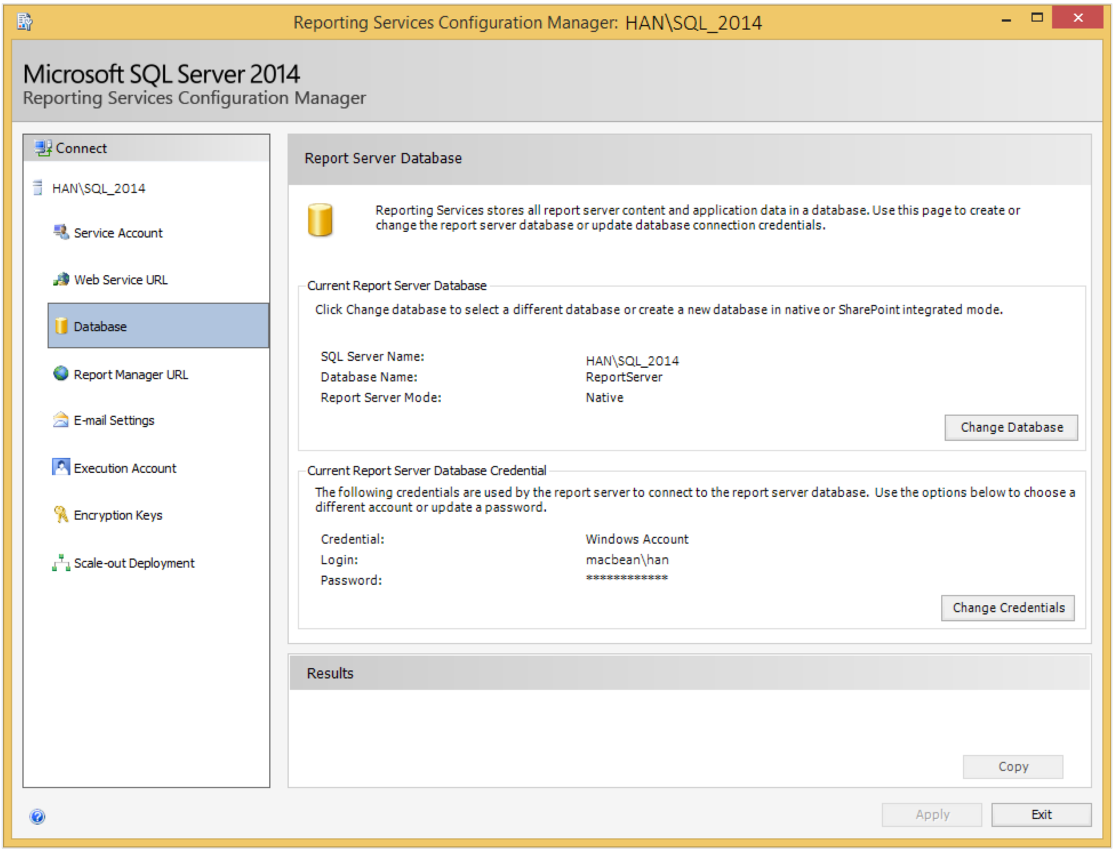


3. Select the **Web Service URL** setting. The following screen will be displayed:




4. Type the name of the virtual directory for the Report Server web service at **Virtual Directory** in the **Report Server Web Service Virtual Directory** section. The URL link for the Report Server web service is displayed at **URLs**.

5. Next, select the **Database** setting. The following screen will be displayed:




6. Under the **Database** setting and in the respective sections, define the database name and credential to access the database.

**Note:**
When creating a connection for the first time, you can create a Report Server database or select an existing database.

7. Define other necessary fields, and then click **Apply**.
8. Click **Exit**.

# 3. REPORTING SERVER CONFIGURATION IN EXACT SYNERGY ENTERPRISE

Before you can start using the reporting application, you need to configure the reporting server. Due to security considerations, it is recommended that the customer defines a user on the server that has access to the reporting server, and that the user has at least the **Content Manager** role. This ensures that all available functionalities via Exact Synergy Enterprise can be executed on the Report Server.

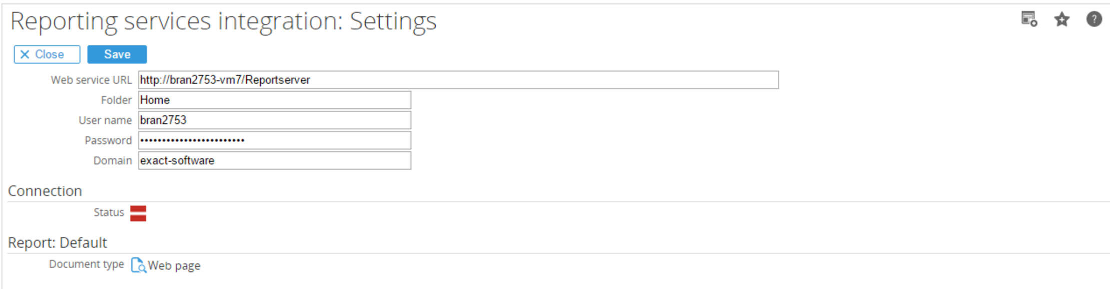
With the configuration on the server, you can use Exact Synergy Enterprise to gain access to reporting services infrastructure. You will also be able to do CRUD operations, render under different existing formats (PDF, Microsoft Excel, and Microsoft Word), which are supported by Microsoft Reporting Server.

You can maintain the settings if you have been assigned the **Administrator** role.

> **Note:**
> The estimated time required to complete the following task is approximately 2 minutes.

**To configure the Reporting services integration settings:**

1. Go to Modules → System → Setup → Reporting services integration → Settings. The following page will be displayed:




2. At **Web service URL**, type the location of the virtual directory for the Report Server to define where the reporting services are accessed. This is mandatory. For example, "http://<name of the machine/ReportServer".
3. At **Folder**, type the name of the folder (section on Report Server) that is used via Exact Synergy Enterprise. By default, **Home** will be filled in.
4. At **User name**, type the username to define the person who will be maintaining the data sources and reports in Exact Synergy Enterprise.
5. At **Password**, type a password for the user.
6. Type the domain for the user at **Domain**.
7. In the **Report: Default** section at **Document type**, select an option to define the document type that will be used when saving a report as a document. For more information, *see Chapter 4.10 — Saving Reports as Documents in Exact Synergy Enterprise*.
8. Click **Save** to save the configuration or **Close** to exit without saving.

# 4. PROCESSES

## 4.1 ORGANIZING REPORTS WITH REPORT GROUPS

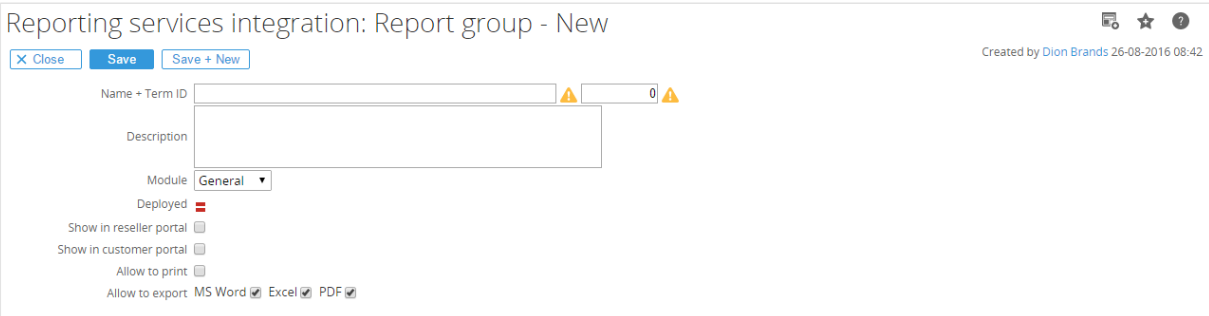
In order to simplify the way reports are organized, the customer is provided with a simple grouping option for reports. Before any report can be created, you have to define at least one report group for the report to be linked to.

You can maintain report groups if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 2 minutes.

**To create report groups:**

9. Go to Modules → System → Setup → Reporting services integration → Management, and then click **Report group: New**. The following page will be displayed:




10. At **Name + Term ID**, type the name and the term ID of your preferred language for the report group.
11. Fill in the description of the report group at **Description**.
12. At **Module**, select a module for the report group.
13. At **Deployed**, the status of the deployment is displayed. is displayed for a report group that has not been deployed to the Report Server. When a report group has been deployed, will be displayed.
14. Select the **Show in reseller portal** check box to display the report group in the reseller's portal.
15. Select the **Show in customer portal** check box to display the report group in the customer's portal.
16. Select the **Allow to print** check box to allow reports to be printed.
17. Select the **MS Word**, **Excel**, and/or **PDF** check box(es) at **Allow to export** to enable reports to be exported to the Microsoft Word, Excel, and/or PDF document format(s).
18. Click **Save** to save the report group, **Save + New** to save the report group and create another entry, or **Close** to exit without saving.

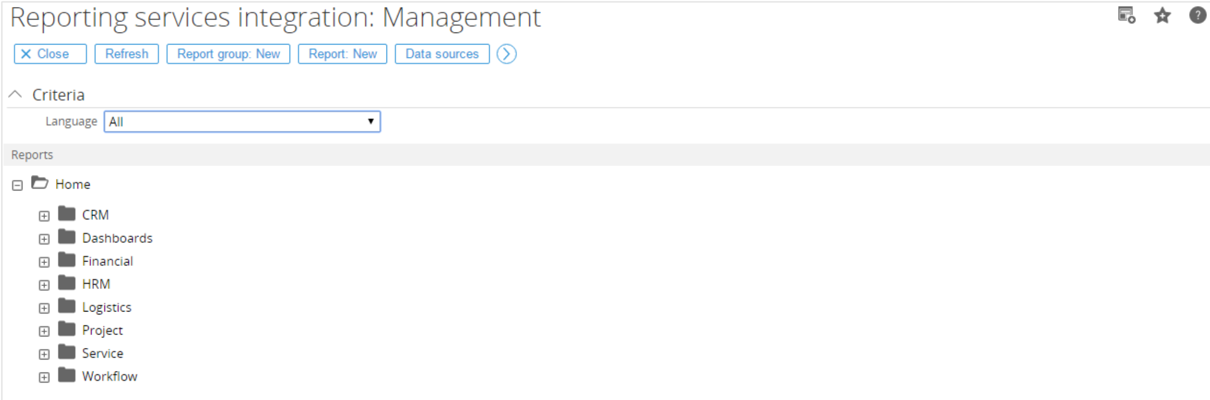
**Note:**
All fields with the "**!**" icon are mandatory.

You can modify the name, description, and/or module of existing report groups.

**Note:**
The estimated time required to complete the following task is approximately 1 minute.

**To modify existing report groups:**

1. Go to Modules → System → Setup → Reporting services integration → Management. The following is an example of the page that will be displayed:




2. Click the name of the report group.
3. You can change the name of the report group (all reports are moved to a new folder), the description (the description of the folder is changed on SSRS), or the module, and then click **Save** to save the changes or click **Close** to exit without saving. Changes done on the report groups are reflected back to SSRS.

Roles can be added to existing report groups. This allows you to set the default security for reports belonging to the same report group. By default, all reports in any report groups will be visible and available for every user. For more information, *see Chapter 4.4 — Defining Roles.*

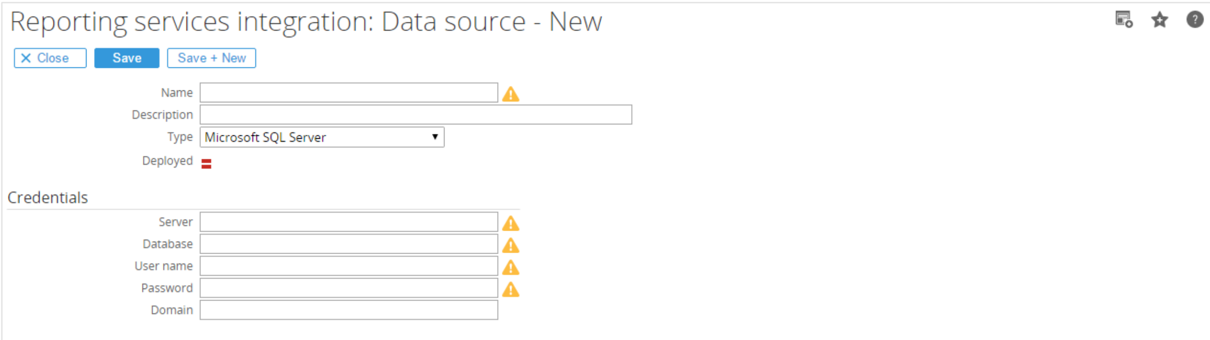
## 4.2 CREATING AND MODIFYING DATA SOURCES

The local data source will be automatically created when the settings for **Reporting Services Integration** are defined and the local data source does not exist yet. The credentials used for the local data source will also be copied from the settings. However, if you want to display reports on other data sources other than on Exact Synergy Enterprise, for example on Exact Globe, you will need to create the data sources. You can maintain data sources if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 8 minutes.

**To create data sources:**

1. Go to Modules → System → Setup → Reporting services integration → Management, and then click **Data sources**.
2. Click **New**. You will see the following page:




3. At **Name**, type the name of the data source.
4. Type in the description of the data source at **Description**.
5. At **Type**, select **Microsoft SQL Server, Microsoft SQL Azure, OLE DB, Microsoft SQL Server Analysis Services, or ODBC** to define the type of the data source.

**Note:**
If you have selected **Microsoft SQL Server** or **Microsoft SQL Server Analysis Services**, proceed to step 8.

6. The status of the deployment is displayed at **Deployed**. is displayed for a data source that has not been deployed to the Report Server. When a data source has been deployed, will be displayed.
7. In the **Connection** section at **Connection string**, type the connection string for a data source to which you want to connect. See *http://www.connectionstrings.com/Articles/Show/what-is-a-connection-string* for a list of possible data sources and what the connection string should contain in order to connect to the data source.

**Note:**
This is available only if you have selected **ODBC** or **OLE DB** in step 5.

8. In the **Credentials** section at **Server**, type the name of the server for the data source. This is available only if you have selected **Microsoft SQL Server** or **Microsoft SQL Server Analysis Services** in step 5.
9. At **Database**, type the name of the database for the data source. This is available only if you have selected **Microsoft SQL Server** or **Microsoft SQL Server Analysis Services** in step 5.

10. At **User name**, type the username of the person who will be able to read the data from the data source. This person should have at least the **db_datareader** role to be able to read the data.
11. At **Password**, type the password for the person.
12. At **Domain**, type the name of the domain for the user. You can define the machine name if the person is a local user.

**Note:**
This field will not be displayed if Microsoft SQL Azure is selected at Type.

13. Click **Save** to save the data source, **Save + New** to save the data source and create another entry, or **Close** to exit without saving.

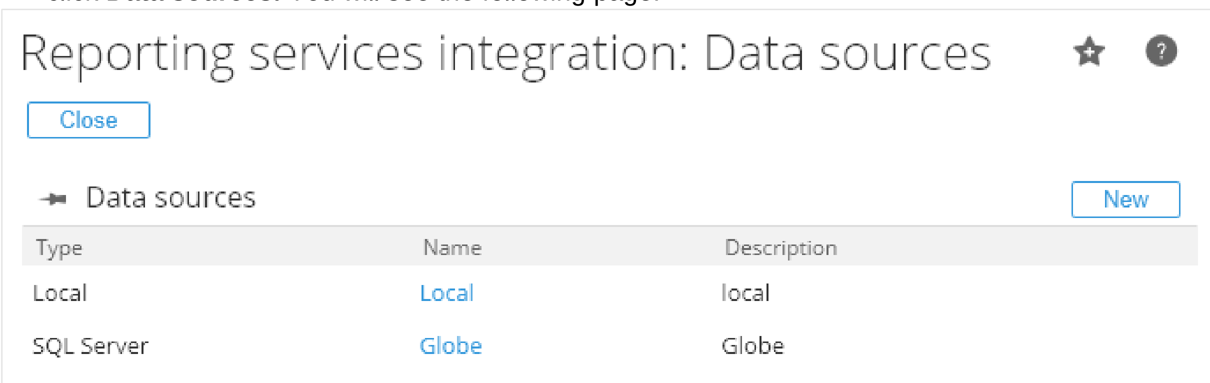
**Note:**
All fields with the "**!**" icon are mandatory.

You can modify the name and/or description of existing data sources.

**Note:**
The estimated time required to complete the following task is approximately 1 minute.

**To modify existing data sources:**

1. Go to Modules → System → Setup → Reporting services integration → Management, and then click **Data sources**. You will see the following page:




2. Click the hyperlink in the **Name** column to view the details of the respective data source.
3. Make the required changes, and then click **Save** to save the changes, or click **Close** to exit without saving.

## 4.3 CREATING AND MODIFYING REPORTS

When a report is created, you need to define the report group where the report can be stored and have an RDL file selected. The RDL file extension stands for Reporting Definition Language, which in essence is an XML format that SSRS knows how to interpret and export to specific formats through existing extensions.

Reports need to be created using the Report Builder or BI Development Studio from the same version or lower from the version of the Report Server which is being integrated in Exact Synergy Enterprise. This is necessary to ensure the compatibility with the reports and the Report Server.

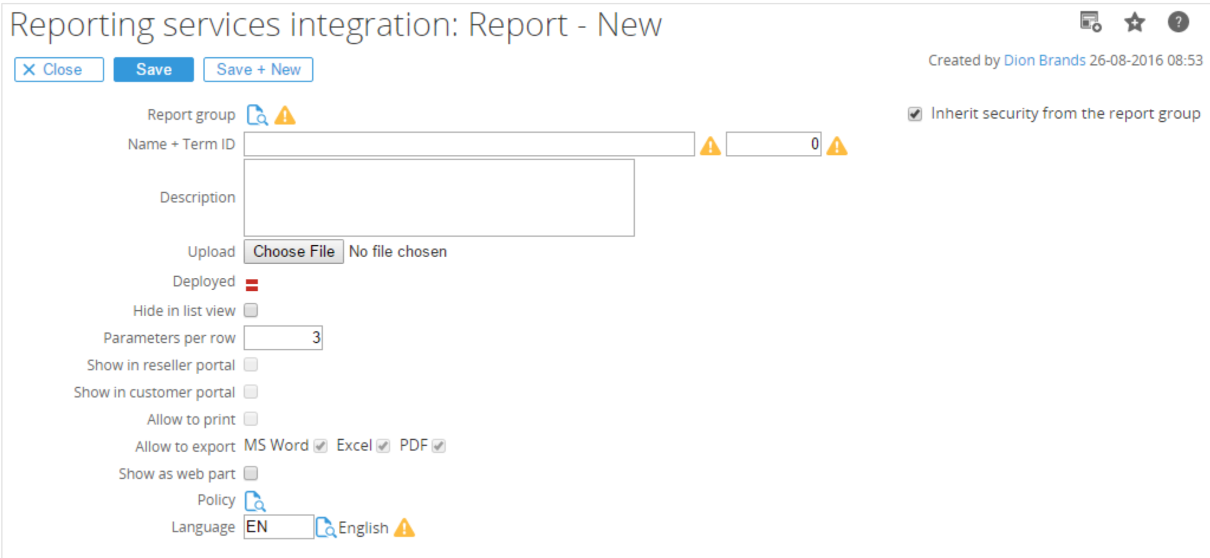
When the report is stored on SSRS, the data sources it uses are automatically converted to those defined during the Exact Synergy Enterprise installation, thus providing the integration between the Exact Synergy Enterprise database or other data sources and the report.

You can maintain reports if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 5 minutes.

**To create reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management, and then click **Report: New**. The following page will be displayed:




2. At **Report group**, select the report group to which the report belongs.
3. Select the **Inherit security from the report group** check box if you want this report to maintain the same viewing rights defined for the selected report group. To define a different security setting, clear this check box.
4. At **Name + Term ID**, type the name and the term ID of your preferred language for the report.
5. Type the description of the report at **Description**.
6. At **Upload**, click **Choose File** to select the report (RDL fi le) to be uploaded. This report has to be designed beforehand using the Report Builder or BI Development Studio.
7. The status of the deployment is displayed at **Deployed**. is displayed for a report that has not been deployed to the Report Server. When a report has been deployed, will be displayed.
8. Select the **Hide in list view** check box to hide the report in the report tree. This report can only be accessed via a high-level report, which has a drill through action “Jump to report” and is configured to jump to this report.

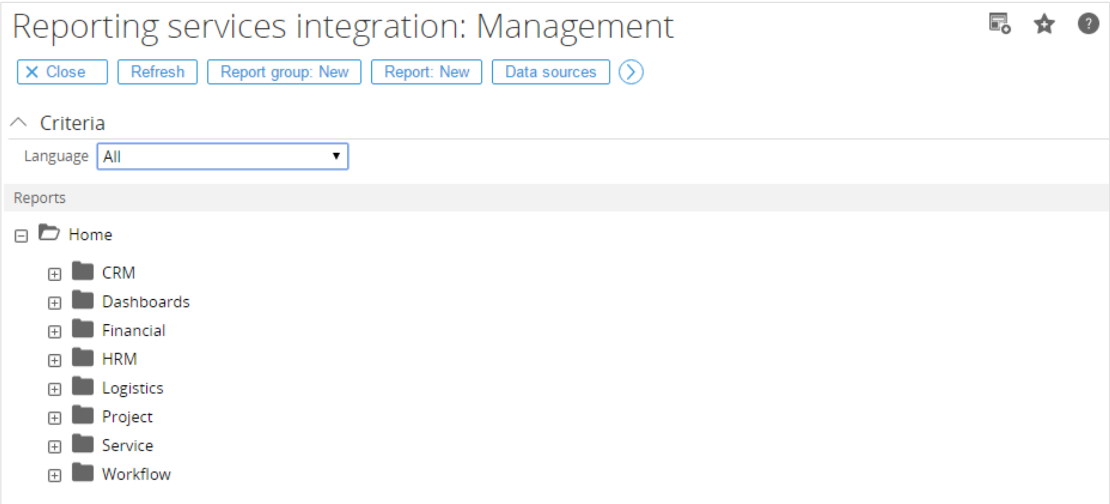
9. At **Parameters per row**, type the value to define the number of parameters to be displayed on the page when viewing the report.
10. Select the **Show in reseller portal** check box to display the report in the reseller's portal.
11. Select the **Show in customer portal** check box to display the report in the customer's portal.
12. Select the **Allow to print** check box to allow reports to be printed.
13. Select the **MS Word**, **Excel**, and/or **PDF** check box(es) at **Allow to export** to enable reports to be exported to the Microsoft Word, Excel, and/or PDF document format(s).
14. Select the **Show as web part** check box to display the report as a web part.
15. At **Policy**, click to select a policy to be linked to the report.
16. At **Language**, type or select the language in which the report will be displayed. By default, this field displays the language predefined at **Language** in the **Regional options** section, under the **General** tab on the **Preferences** page.
17. Click **Save** to save the report, **Save + New** to save the report and create another entry, or **Close** to exit without saving.

**Note:**
All fields with the "**!**" icon are mandatory.

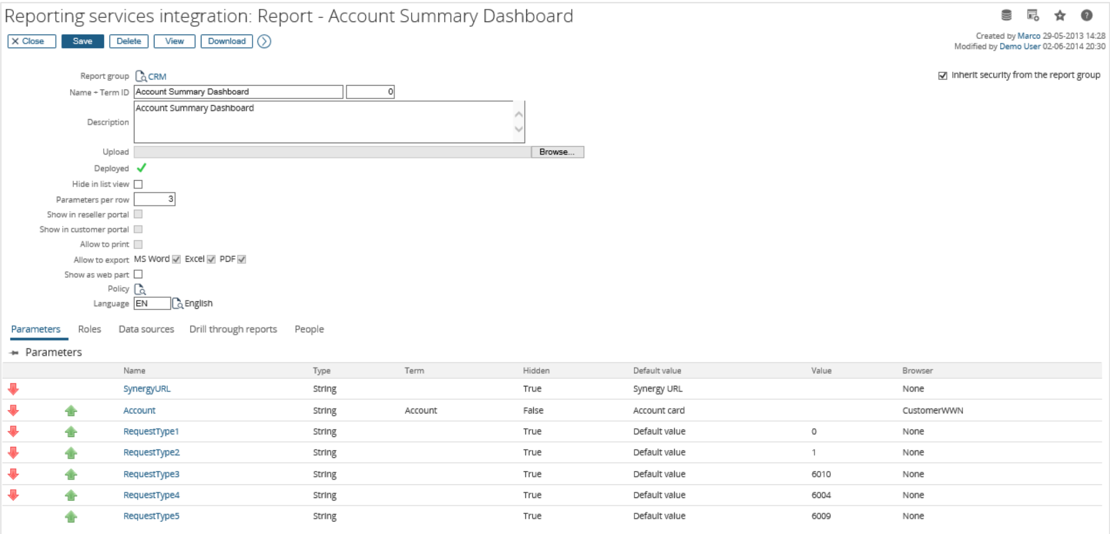
**Note:**
The estimated time required to complete the following task is approximately 2 minutes.

**To modify reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management. The following is an example of the page that will be displayed:




2. Click ⊞ to expand the reports in a report group, and then click the required report. The following page is displayed:




3. Select another report group at **Report group** to move the report to a new parent or folder on SSRS.
4. At **Name + Term ID**, type a different name and the term ID of your preferred language for the report. The **FileName** and **FileContent** will be changed on SSRS.
5. At **Description**, type a new description for the report. The description of the report will be changed on SSRS.
6. Click the **Parameters** tab to view and configure the parameters of the report.
7. Click the **Roles** tab to view and add roles for this report.
8. To view the data sources for this report, click the **Data sources** tab.
9. Click the **Drill through reports** tab to view the drill through reports created for this report.
10. Click the **People** tab to add or link people to the report. This enables them to view the report.
11. Once you made the changes, click **Save** to save the changes or **Close** to exit without saving the changes.

**Tip:**
Changes done on the reports are reflected back to SSRS.

## 4.4 DEFINING ROLES

You can assign roles to your reports to control the accessibility of the reports. If no roles have been assigned to the report, then everyone will be able to view the report.

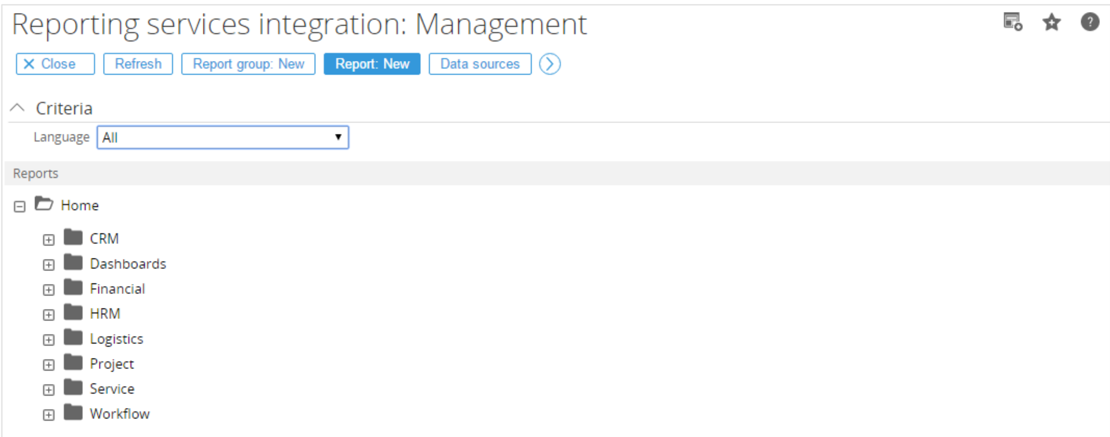
It is also possible to link roles to a report group. With this, you have the option to have all or selected reports that are linked to this report group, follow the same security setting. This saves your time in setting up the security for each report.

You can define access rights to reports if you have been assigned the **Report manager** role.

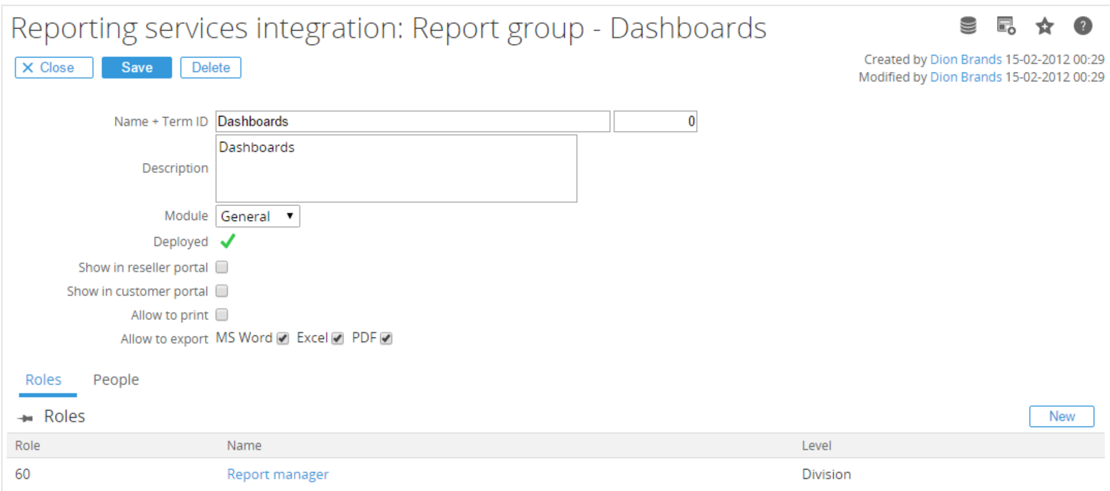
**Note:**
The estimated time required to complete the following task is approximately 2 minutes.

**To define roles for reports groups:**

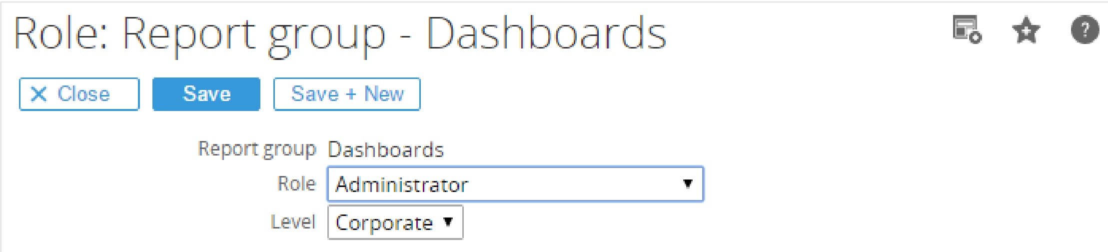
1. Go to Modules → System → Setup → Reporting services integration → Management. The following is an example of the page that will be displayed:




2. Click the name of the report group. You will see the following page:



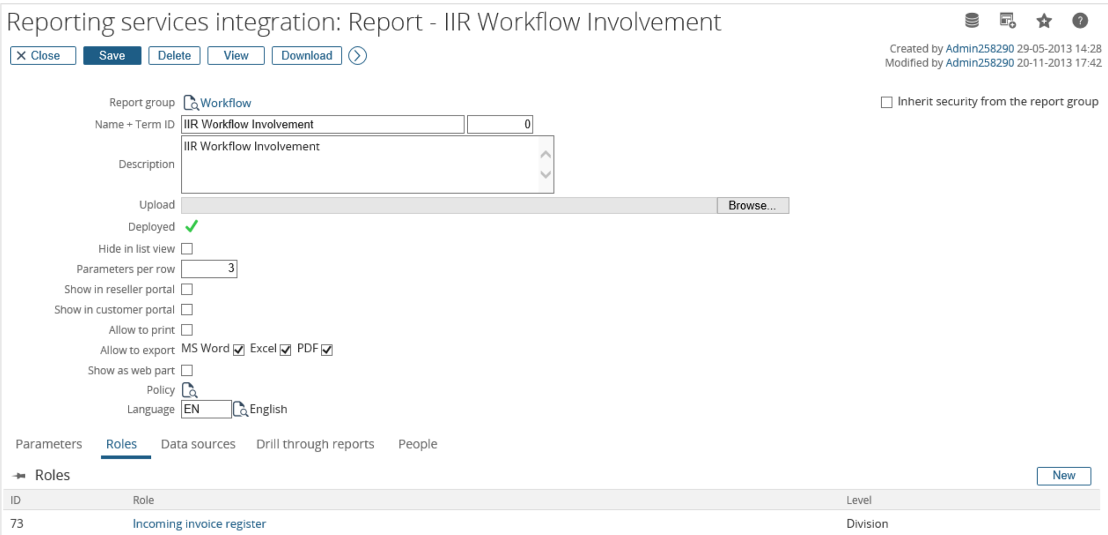
3. Click **New** under the **Roles** tab. The following page is displayed:



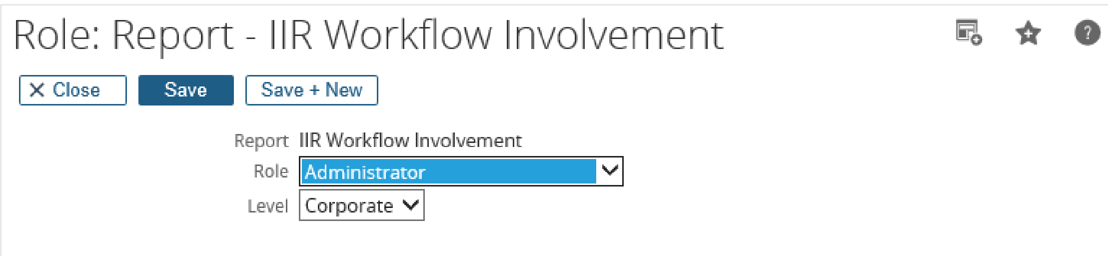

4. Select the role and level at **Role** and **Level** respectively.
5. Click **Save** to link the role to the report group, **Save + New** to link the role to the report group and link another role, or **Close** to exit without linking any roles.

**To define roles for reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click ⊞ to expand the reports in a report group, and then click the required report. The following is an example of the page that will be displayed:




2. Click the **Roles** tab, and then click **New**. You will see the following page:




3. Select the role and level of the role at **Role** and **Level** respectively.
4. Click **Save** to link the role to the report, **Save + New** to link the role to the report and link another role, or **Close** to exit without assigning any roles.

## 4.5 CONFIGURING PARAMETERS

Reports can be designed against a number of parameters that are specified by the report designer. When a report is uploaded, those parameters are retrieved and the customer has the option to define how those parameters should be used.

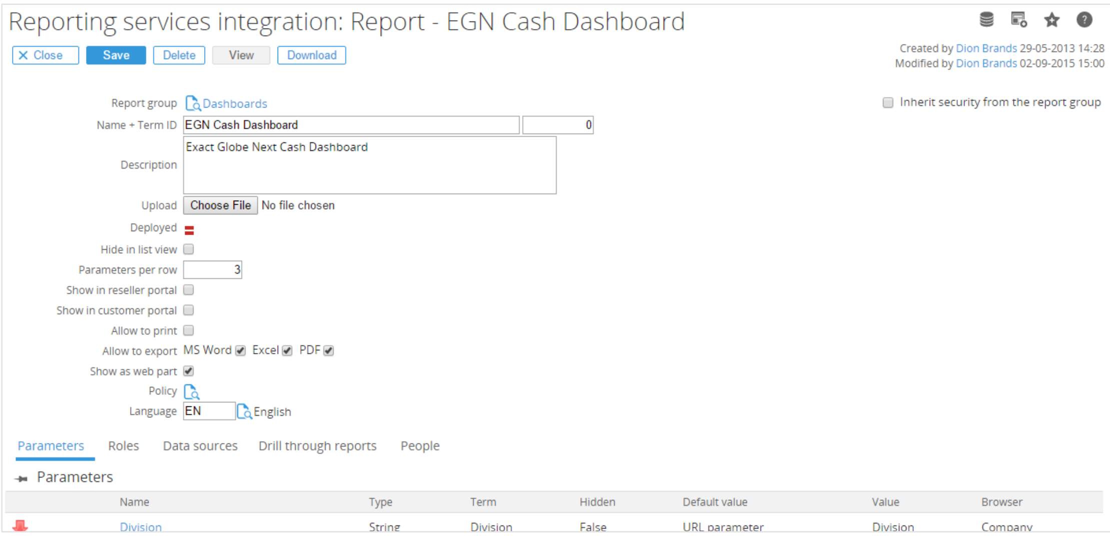
Parameters are defined via the Report Builder or BI Development Studio. However, it is possible to link default values from Exact Synergy Enterprise to the parameters or hide them. It is also possible to help the user to select only available values for the report parameter by linking an already defined browser from Exact Synergy Enterprise.

You can configure report parameters if you have been assigned the **Report manager** role.

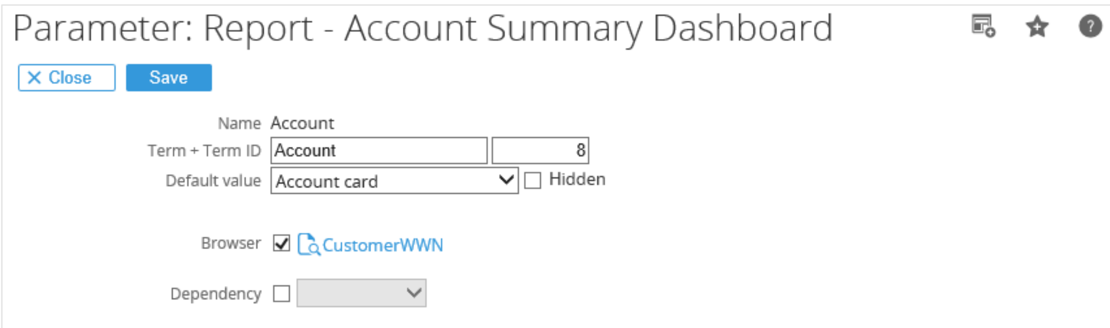
**Note:**
The estimated time required to complete the following task is approximately 2 minutes.

**To configure parameters:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click to expand the reports in a report group, and then click the required report. The following is an example of the page that will be displayed:




2. Click the **Parameters** tab, and then click a hyperlink in the **Name** column. You will see the following page:




3. At **Term + Term ID**, type the parameter so that it uses the correct term in your preferred language.

4. At **Default value**, select one of the available options to be used for the parameter:
   - **Account card** — The account GUID from the account card will be used.
   - **As designed** — This means that the default value will be displayed as designed via the Report Builder or BI Development Studio.
   - **Current user (ID)** — The default value will be automatically populated with the ID of the current user.
   - **Current user (Name)** — The default value will be automatically populated with the login name of the current user.
   - **Current user cost center** — The default value will be automatically populated with the cost center code of the current user.
   - **Current user division** — The default value will be automatically populated with the division code of the current user.
   - **Current user division group** — The default value will be automatically populated with the division group of the current user.
   - **Current user job activity** — The default value will be automatically populated with the job activity of the current user.
   - **Current user job group** — The default value will be automatically populated with the job group of the current user.
   - **Current user security level** — The default value will be automatically populated with the security level of the current user.
   - **Default value** — The default value that is specified at the **Value** field will be used.
   - **Item card** — The item code from the item card will be used.
   - **Opportunity card** — The opportunity code from the opportunity card will be used.
   - **Personal card** — The employee ID from the personal card will be used.
   - **Project card** — The project code from the project card will be used.
   - **Real user (ID)** — The default value will be automatically populated with the current user who is viewing the report (in case of delegation).
   - **Synergy URL** — The default value will be automatically populated with the URL of the current user. For example "http://gird16372-1/Synergy".
   - **URL parameter** — The value from a named parameter at **Value** will be used. For example when the URL is "http://gird16372-1/Synergy/docs/Portal.aspx?MyParameter=ABC" the Value will be "MyParameter".
5. Select the **Hidden** check box to hide the report parameter when the user views the report. This can ensure that the values are always fixed.
6. At **Value**, type the default value or the named parameter of the URL parameter. This field is enabled only if you have selected the option **Default value** or **URL parameter** at **Default value**.
7. At **Browser**, select the check box and select one of the options available to link a browser to the report parameter. You can only select a standard Exact Synergy Enterprise browser for a parameter when you select **Allow multiple values** in the Report Builder or BI Development Studio.
8. At **Dependency**, select the check box and select one of the options available to link a dependency to the report parameter. This way you can add an additional filter for the available values for a parameter. For example if you have the **Division** and **Costcenter** parameters, the **Costcenter** parameter is dependent on the **Division** parameter. You can only select a cost center from a particular division.
9. Click **Save** to save the changes or click **Close** to exit without saving.

## 4.6 CREATING LINKED REPORTS

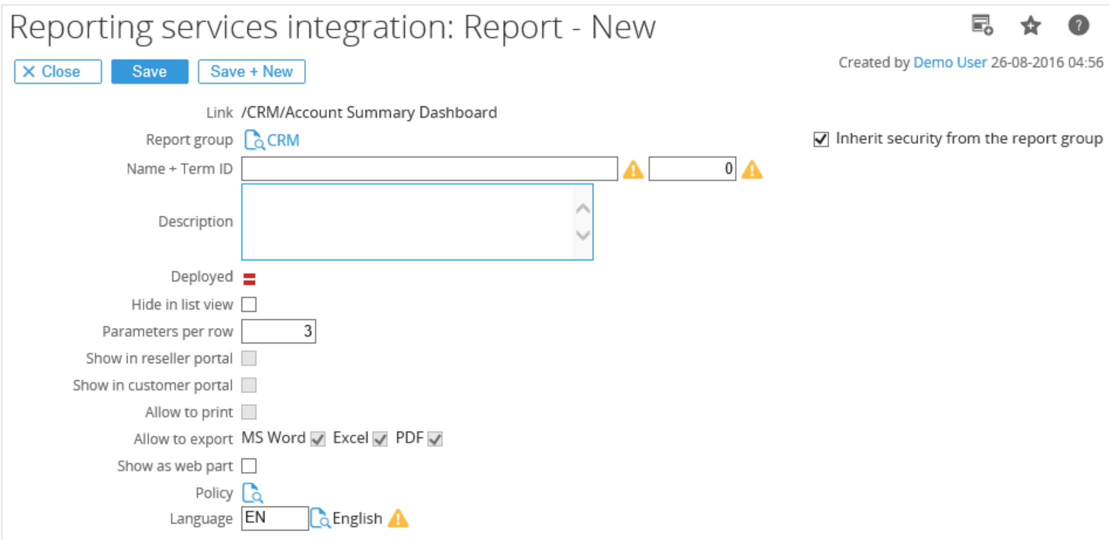
A linked report always inherits the report layout and data source properties of the original report. However, it is possible for a linked report to have different parameter properties, roles, people and subscriptions from the original report.

Creating a linked report will allow you to have one report definition and the possibility to create different security and default values for the parameters without creating separate RDL files.

**Note:**
The estimated time required to complete the following task is approximately 3 minutes.

**To create linked reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click to expand the reports in a report group, and then click the required report from which you want to create a linked report.
2. Click **Create linked report**. You will see the following page:




3. The name of the original report will be displayed at **Link**.
4. By default, the report group of the original report will be displayed at **Report group**.
5. Select the **Inherit security from the report group** check box to maintain the same viewing rights defined for the selected report group for this report. To define a different security setting, clear this check box.
6. At **Name + Term ID**, type the name and the term ID of your preferred language for the report. This is mandatory.
7. Type the description of the report at **Description**.
8. The status of the deployment is displayed at **Deployed**. is displayed for a report that has not been deployed to the Report Server. When a report has been deployed, will be displayed.
9. Select the **Hide in list view** check box if you want the report to be hidden in the report tree. This report can only be accessed via a high-level report, which has a drill through action “Jump to report” and is configured to jump to this report.
10. At **Parameters per row**, type the value to define the number of parameters to be displayed on the page when viewing the report.
11. Select the **Show in reseller portal** check box to display the report in the reseller's portal.
12. Select the **Show in customer portal** check box to display the report in the customer's portal.
13. Select the **Allow to print** check box to allow reports to be printed.
14. Select the **MS Word**, **Excel**, and/or **PDF** check box(es) at **Allow to export** to enable reports to be exported to the Microsoft Word, Excel, and/or PDF document format(s).

15. Select the **Show as web part** to display the report as a web part.
16. At **Policy**, click  to select a policy to be linked to the report.
17. At **Language**, select the language in which the report will be displayed. By default, this field displays the language predefined in the **Regional options** section, under the **General** tab on the **Preferences** page.
18. Click **Save** to save the linked report, **Save + New** to save the linked report and create another entry, or **Close** to exit without saving.

**Note:**
All fields with the "**!**" icon are mandatory.

## 4.7 DOWNLOADING REPORTS

If a report manager wants to change a certain aspect of a report, the report manager does not always have the version used to upload to Exact Synergy Enterprise. Therefore, he has the option to download the report.

Once you have updated the contents of the file, you will be able to upload the new version to Exact Synergy Enterprise and automatically to reporting services.

You can download reports if you have been assigned the **Report manager** role.

> **Note:**
> The estimated time required to complete the following task is approximately 1 minute.

**To download reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click ⊞ to expand the reports in a report group, and then click the required report.
2. Click **Download**. You will be prompted to either open or save the report file. Make your selection, or click **Cancel** to cancel the download.

## 4.8 VIEWING REPORTS

For a defined report, you can decide if you want to see that report. You will need to fill in the values that are necessary to view the report. Once the values are validated, the report can be generated, exported, saved, or printed.

The parameters that have default values will be filled with those values, while those with specific options included will also be displayed as such.

You can view reports via Modules → System → Setup → Reporting services integration → Management if you have been assigned the **Report manager** role.

> **Note:**
> The estimated time required to complete the following task is approximately 1 minute.

**To view reports:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click ⊞ to expand the reports in a report group, and then click the required report.
2. Click **View**. The report will then be displayed.
3. Click **Close** to exit.

## 4.9 EXPORTING REPORTS

After you have defined the parameters required for viewing a report, you can export the report to the PDF, Microsoft Word, or Microsoft Excel format.

You can export reports via Modules → System → Setup → Reporting Services Integration → Management if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 3 minutes.

**To export reports:**

1. Go to Modules → System → Setup → Reporting Services Integration → Management, click to expand the reports in a report group, and then click the required report.
2. Next, click **View**. The report will then be displayed.
3. Click , , or on the top right of the report to export it to the Microsoft Word, Microsoft Excel, or PDF format respectively. You will be prompted to either open or save the report file. Make your selection, or click **Cancel** to cancel the export process.

## 4.10 SAVING REPORTS AS DOCUMENTS IN EXACT SYNERGY ENTERPRISE

After you have defined the parameters required for viewing a report, you can also save it as a document in Exact Synergy Enterprise.

You can save reports via Modules → System → Setup → Reporting services integration → Management if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 8 minutes.

**To save reports as documents in Exact Synergy Enterprise:**

1. Go to Modules → System → Setup → Reporting services integration → Management, click to expand the reports in a report group, and then click the required report.
2. Click **View**. The report will then be displayed.
3. Click **Save**. The report will then be displayed on the document editor.
4. Once you have updated the report, click **Save** to save the report as a document in Exact Synergy Enterprise. Click **Draft** to save it as a draft copy.

## 4.11 REDEPLOYMENT OF DATA SOURCES, REPORT GROUPS, REPORTS, SCHEDULES, AND SUBSCRIPTIONS

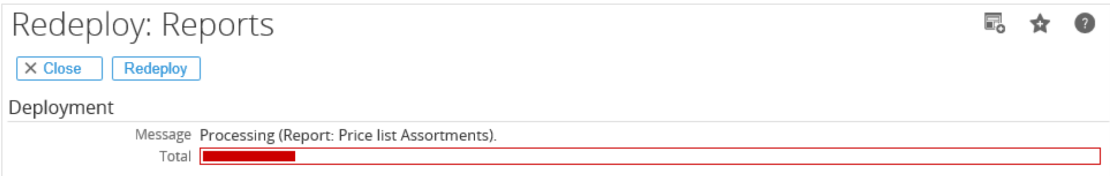
There are scenarios when a user loses the data in Reporting Services or there is a backup of another Exact Synergy Enterprise installation. In these cases, the user will need to redeploy the reporting repository structure from the Exact Synergy Enterprise database to SSRS for infrastructure or performance reasons.

You can perform the redeployment via Modules → System → Setup → Reporting Services Integration → Management if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 1 minute.

**To perform the redeployment:**

1. Go to Modules → System → Setup → Reporting services integration → Management, and then click **Redeploy**. The following page will be displayed:




**Tip:**
The status of the redeployment is displayed at **Message**.

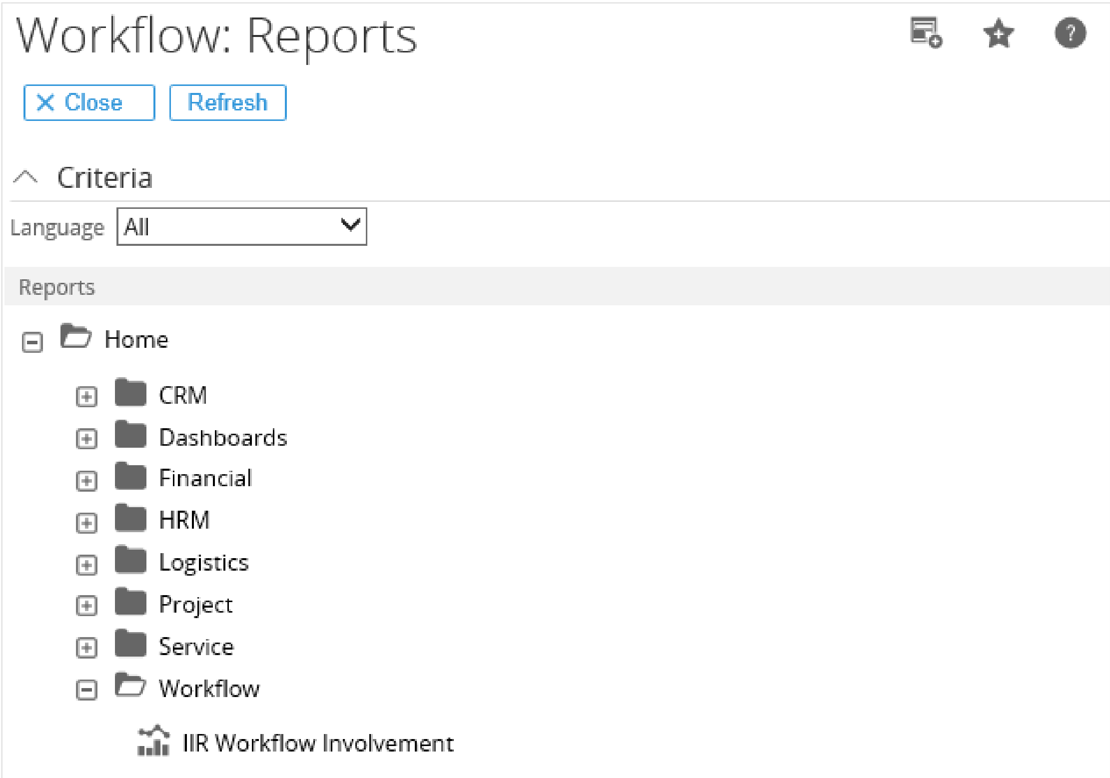
2. Click **Close** to exit.

## 4.12 REPORT TREE FILTERS

Reports grouped in their respective report group can be accessed via their respective cards. For example, you can view reports that are grouped under **HRM** via personal cards.

Besides that, the reports can also be accessed from a few menu paths.

Depending on where you access the reports from, the folder for the particular module will be expanded to display the reports. For example, if you have accessed the reports via the project card or via menu path Modules → Workflow → Reports → Reporting services integration → Reports, the **Workflow** folder will be expanded, while other report groups will remain collapsed, as shown in the following page:




**Note:**
The reports displayed are dependent on the role(s) which has(ve) been assigned to the reports and the user who is viewing the report tree.

**To access HRM reports via personal cards:**

1. Go to Modules → HRM → Reports → People → Search, define the relevant criteria, and then click **Show**.
2. Click the hyperlink in the **Name** column to display the personal card.
3. Click **Reports** in the **Monitor** section.

**Tip:**
You can also access reports grouped under **HRM** at Modules → HRM → Reports → Reporting services integration → Reports.

The report list accessed from a personal card is additionally filtered. Aside from the standard security filter which only displays reports which a user is allowed to see, an extra filter is added. Only reports with the **Default value** parameter set to **Personal Card** will be displayed here.

**To access CRM reports via account or opportunity cards:**

1. Go to Modules → Customers → Reports → Accounts → Search or Customers → Reports → Opportunity management → Search, define the relevant criteria, and then click **Show**.
2. Click the hyperlink in the **Account name** column to display the account card or in the **Opportunity: Description** column to display the opportunity card.
3. Click **Reports** in the **Monitor** section.

**Tip:**
You can also access reports grouped under **CRM** at Modules → Customers → Reports → Reporting services integration → Reports.

The report list accessed from an opportunity or account card is additionally filtered. For reports accessed via account cards, only reports with the **Default value** parameter set to **Account card** will be displayed. For reports accessed via opportunity cards, only reports with the **Default value** parameter set to **Opportunity card** will be displayed.

**To access Project reports via project cards:**

1. Go to Modules → Projects → Reports → Search → Projects, define the relevant criteria, and then click **Show**.
2. Click the hyperlink in the **Project** column to display the project card.
3. Click **Reports** in the **Monitor** section.

**Tip:**
You can also access reports grouped under **Project** at Modules → Projects → Reports → Reporting services integration → Reports.

The report list accessed from a project card is additionally filtered. Only reports with the **Default value** parameter set to **Project card** will be displayed.

**To access Logistics reports via item cards:**

1. Go to Modules → Logistics → Reports → Search → Items, define the relevant criteria, and then click **Show**.
2. Click the hyperlink in the **Code** column to display the item card.
3. Click **Reports** in the **Monitor** section.

**Tip:**
You can also access reports grouped under **Logistics** at Modules → Logistics → Reports → Reporting services integration → Reports.

The report list accessed from an item card is additionally filtered. Only reports with the **Default value** parameter set to **Item Card** will be displayed.

Last but not least, you can access reports that are grouped under **Workflow** via Modules → Workflow → Reports → Reporting services integration → Reports.

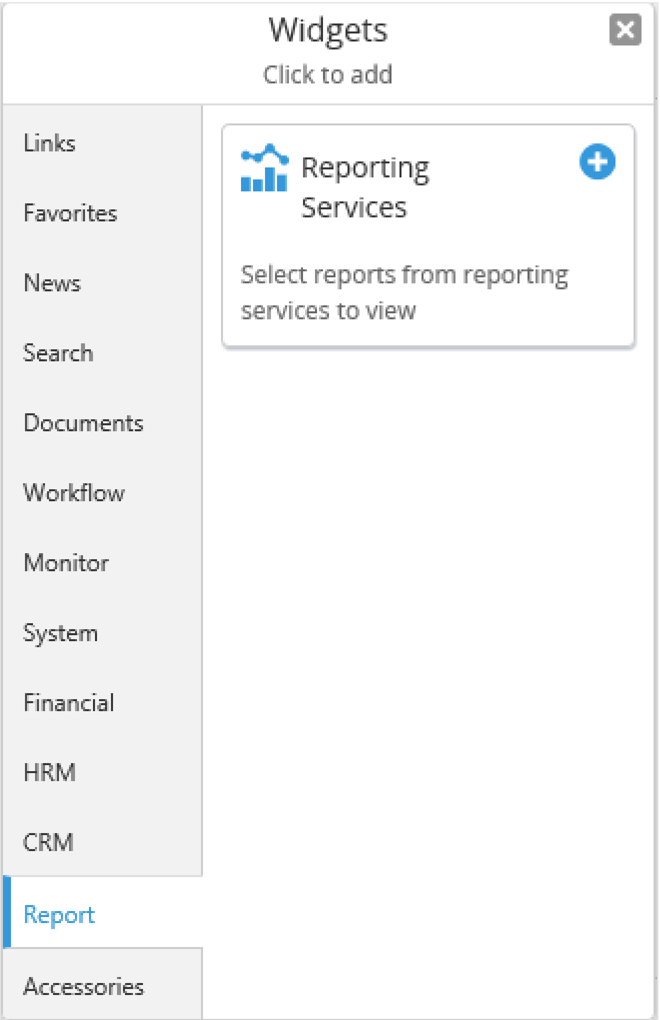
### 4.12.1 Web Parts or Widgets

You have the option to view a certain report on the **Workspace** page by adding the report as a web part. Web parts are also known as widgets.

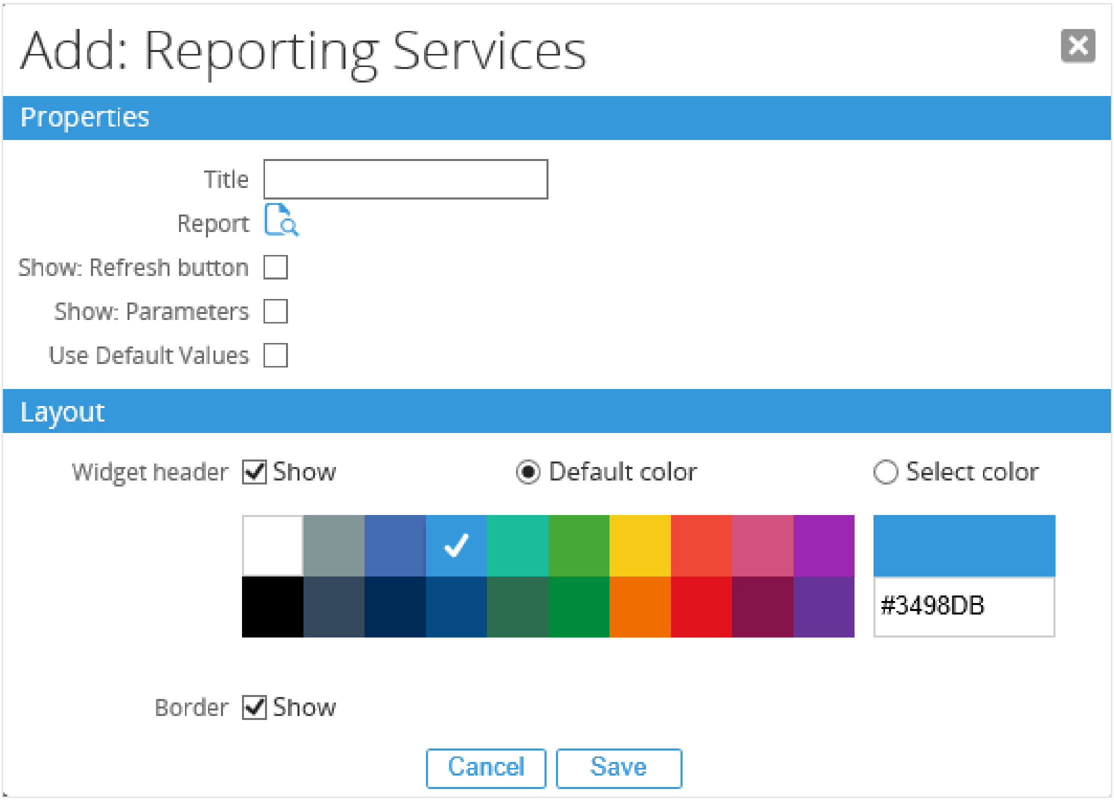
**Note:**
The estimated time required to complete the following task is approximately 1 minute.

**To add reports to workspaces:**

1. Select **Workspace** under the **MY WORKSPACES** section in the menu at the top.
2. Click **Add widget on the bottom right of the page**. The following page will be displayed:



3. Click **Report** on the left panel, and then click **Reporting Services**. The following page will be displayed:



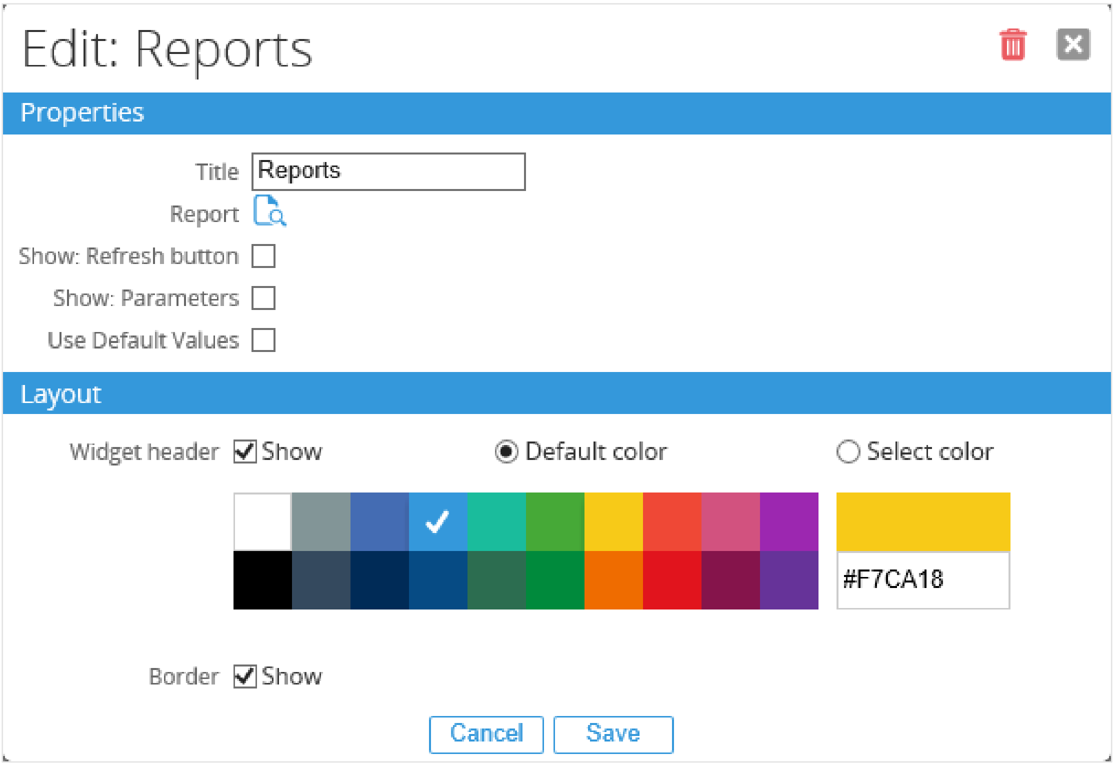

4. Define the fields.
5. Click **Save**.

You can always change the settings of the report that has been added as a web part.

**Note:**
The estimated time required to complete the following task is approximately 3 minutes.

**To define the report settings for workspaces:**

1. Select **Workspace** under the **MY WORKSPACES** section in the menu at the top.
2. In the **report widget** section on the workspace, click **Edit**. You will see the following page:




3. In the **Properties** section at **Report**, click to select the report that you want to add to the **workspace**. The report will then be displayed.
4. Click **Save**.
5. Define the required fields in the **Properties** and **Layout** sections.
6. Click **Save** to display the selected report on the **workspace**.

**Note:**
Only reports which have been defined as **Show as web part** will be displayed in the list of reports to be added as web parts on the workspace.

## 4.13 RECEIVING REPORTS VIA E-MAILS

Having the required information at the right time is very important for the management in an organization. This allows for more efficient analysis, planning, and decision-making.

With Exact Synergy Enterprise, it is possible to subscribe to the reports available. The reports will then be sent to you via e-mails according to the schedules of the reports.

Hence, before anyone can subscribe to a particular report, a schedule has to be created. This defines the time when the report is to be sent and the frequency it is sent.

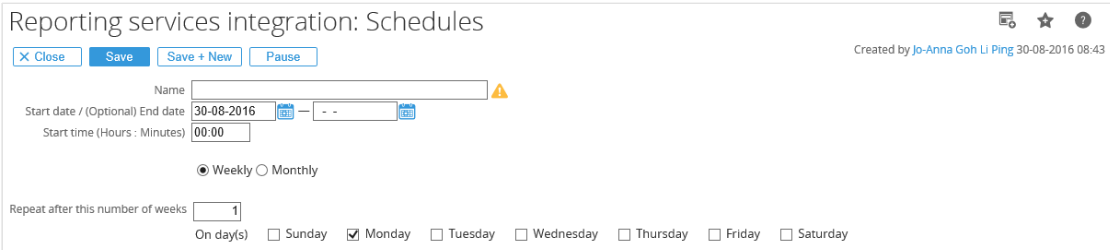
Also, the Report Server has to be configured beforehand to be able to deliver the reports via e-mails. You can learn more on how to configure the Report Server by going to *http://technet.microsoft.com/en-us/library/ms345234(SQL.90).aspx*.

You can maintain schedules if you have been assigned the **Report manager** role.

**Note:**
The estimated time required to complete the following task is approximately 5 minutes.

**To create schedules:**

1. Go to Modules → System → Setup → Reporting services integration → Schedules, and then click **Schedule: New**. You will see the following page:




2. At **Name**, type the name for the schedule.
3. At **Start date / (Optional) End date**, define the date or range of dates when the schedule should start to run and/or the date when the schedule should stop running. By default, the start date is automatically filled in with the system's date.
4. Type the time at **Start time (Hours : Minutes)** to define the time that the schedule should start to run.
5. Select **Weekly** or **Monthly** to define the frequency of the report delivery. Depending on your selection, you will be able to define additional options for the weekly or monthly schedule.
6. Click **Save** to save the schedule, **Save + New** to save the schedule and create another entry, or **Close** to exit without saving.

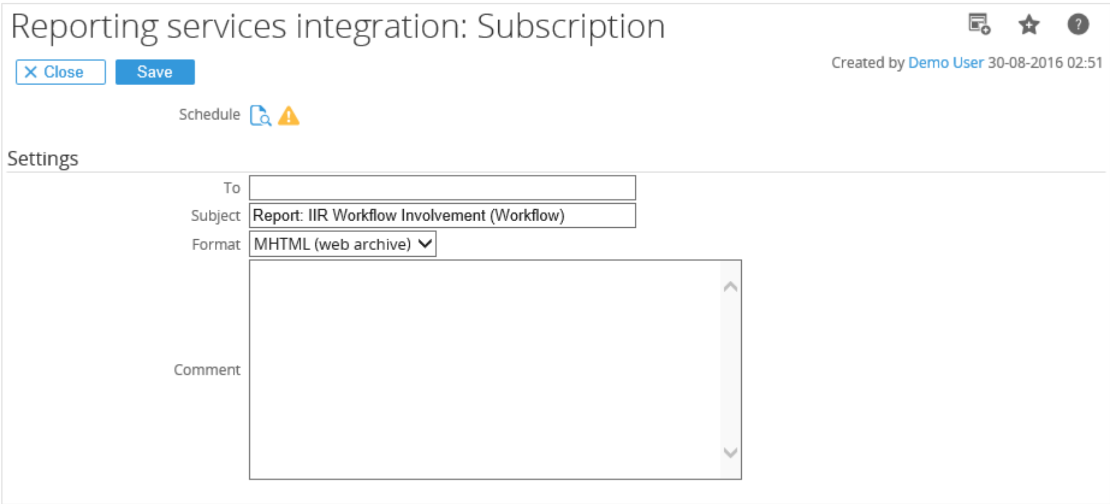
**Note:**
All fields with the "**!**" icon are mandatory.

Once the schedules are created, you will be able subscribe to the reports. You can subscribe to reports and modify the subscriptions only to reports which you are allowed to access. If you have been assigned the **Report manager** role, you can modify all subscriptions.

**Note:**
The estimated time required to complete the following task is approximately 3 minutes.

**To subscribe to reports:**

1. View a particular report. For more information, see *Chapter 4.8 — Viewing Reports or Chapter 4.12 —Report Tree Filters*.
2. Click **Subscribe**. You will see the following page:

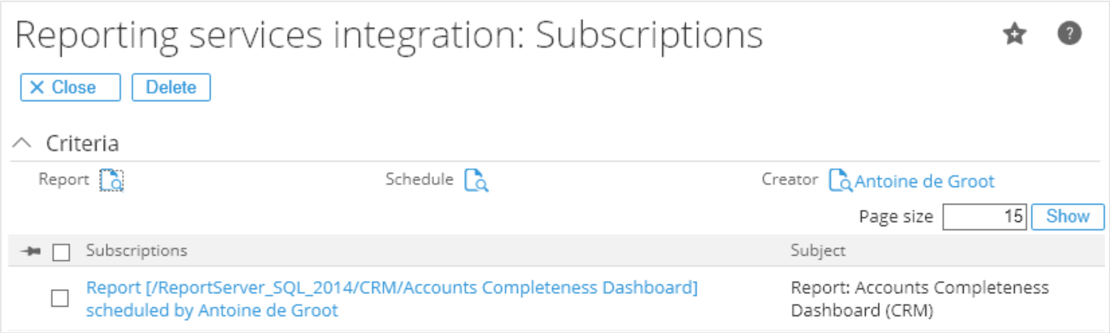



3. At **Schedule**, select the schedule of the subscription.
4. In the **Settings** section, type the e-mail address of the recipient at **To**. To define more than one e-mail address, separate the e-mail addresses with a semicolon (;). The default address is the office e-mail address of the current user.
5. At **Subject**, type the subject of the e-mail that will be sent. By default, the subject is filled in with the name of the report followed by the report group in brackets.
6. At **Format**, select one of the following options to define the format of the report that will be delivered:
   - **MHTML (web archive)** — The report will be in the body of the e-mail.
   - **PDF** — The report will be in the PDF format and attached to the e-mail.
   - **Excel** — The report will be in the Microsoft Excel format and attached to the e-mail.
   - **Word** — The report will be in the Microsoft Word format and attached to the e-mail.
7. At **Comment**, type additional comments, if required. The comments will be available in the body of the e-mail. HTML tags can be used to format the comments.
8. Click **Save** to save the subscriptions or **Cancel** to exit without subscribing.

**Note:**
All fields with the "**!**" icon are mandatory.

**To modify subscriptions:**

1. Go to Modules → System → Setup → Reporting services integration → Subscriptions. The list of reports to which you have subscribed will be displayed. See the following page for an example:

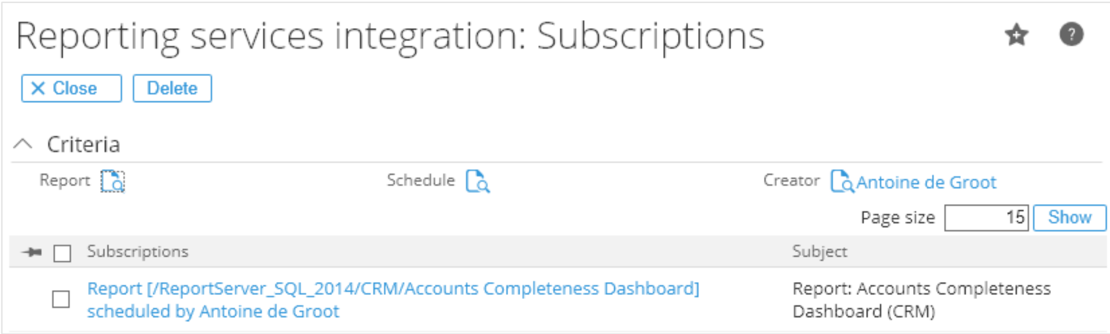



2. Click the hyperlink in the **Subscriptions** column.
3. Once you have made the modifications, click **Save** to save the changes.

If you no longer want to subscribe to a report, you can delete the subscription. There are two ways to do this.

**To delete subscriptions:**

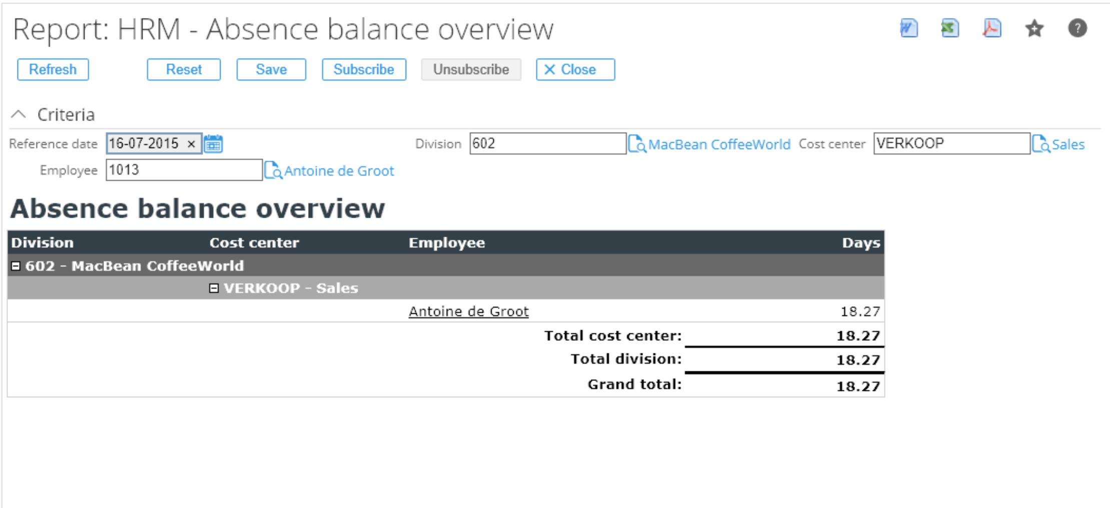
1. Go to Modules → System → Setup → Reporting services integration → Subscriptions. The list of reports to which you have subscribed will be displayed. See the following page for an example:



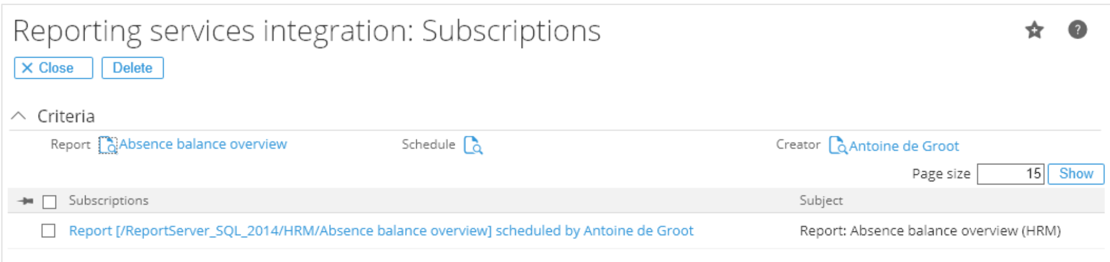

2. Select the check box(es) next to the subscription(s) that you want to delete, and then click **Delete**.

**Or**

1. View the particular report to which you have subscribed. For more information, see *Chapter 4.8 — Viewing Reports or Chapter 4.12 — Report Tree Filters*. You will see the following page:




2. Click **Unsubscribe**. The details of the subscription will be displayed, as shown in the following:




3. Select the check box(es) next to the subscription(s).
4. Click **Delete**. A message will be displayed to confirm the deletion of the subscription.
5. Click **OK** to delete the subscription.

# APPENDIX 1: PRODUCT UPDATE CHANGES

| Product Update | Chapter |
|---|---|
| 248 | All chapters (changed screens) |
| 255 | All chapters |
| 258 | 3, 4.1, 4.2, 4.3, 4.4, 4.5, 4.6, 4.11, 4.12, 4.13, 4.14 |