INSTALLATION AND USER GUIDE

REPORTSPLUS VERSION 4.7

Contents

WHAT'S NEW IN VERSION 4

- Installation includes some demo reports
- Support for Crystal Reports Developer Edition 2008
- Report Properties includes ability to restrict report by current users territory
- Enhanced Admin screen to include report configuration settings
- Admin screen accessible even if licence has expired
- .NET Version 2 support
- Easy Report parameters available in report admin report properties
- Ability to add and launch a report with context sensitive parameter from any entity
- Support for Favourite Reports
- ReportsPlus Favourites block added for Sage CRM dashboards
- Log to include who and when Crystal reports have been run

PRODUCT FEATURES

- Easily design, deliver and integrate Crystal Reports from your central server with ReportsPlus for Sage CRM
- Easy Single Source Installation on your CRM Server
- In-built team, and user security to control sensitive reports
- Brower viewing and new window viewing of reports
- Multiple format export of reports including Excel, PDF and Word
- Standard Crystal report control including parameter entry, zoom and report hierarchy
- Username passing, the plug-in will recognise a current user parameter and integrate the current users name into the report

TECHNICAL INFORMATION

Reports**Plus** for Sage CRM uses the latest Crystal reports .NET technology to integrate with Sage CRM. Reports**Plus** has been developed using .NET as a web based COM object and only requires installation on the CRM Server

Once installed on the server, all users with access to Sage CRM are able to run any number of Crystal Reports written by your organisation with no client installation or additional downloads

These reports can then be printed, saved to a file or exported in many different formats

ReportsPlus can be installed with no licence key as a 30 day evaluation. A licence key can be purchased at a later date and the software easily upgraded to a full version.

SYSTEM REQUIREMENTS

- **Windows Server 2000, 2003, 2008**
- **Sage CRM 6.1 (at least patch d), Sage CRM 6.2**

- **Microsoft .NET Framework 2.0**

  You can download the redistributable package from Microsoft
  http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5

- **Crystal Reports 2008 Release 1** (*If you're in the EU a licence is shipped with ReportsPlus, though not shipped with the BETA Version)*

  You can download a copy buy registering free for a 30 Day Trial:
  http://www.businessobjects.com/campaigns/forms/downloads/crystal/2008/default.asp

TECHNICAL SETTINGS

- Allow upload on edit, as well as add
- Default Report description to Report Name
- Default Report User to user that uploaded the report
- *On installation:* in IIS set OpenReport.Net Virtual Dir to use App.Net.

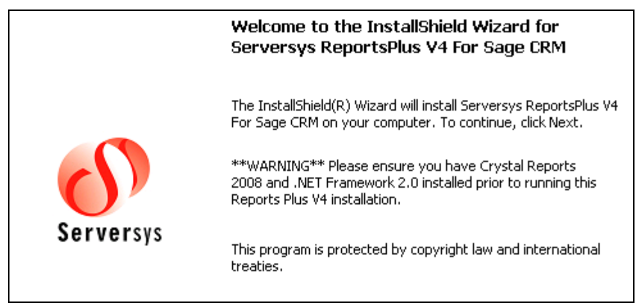
INSTALLATION

Note: Crystal Reports 2008 must be installed in its *Default* location

Note: All previous versions must be *uninstalled* BEFORE attempting to install ReportsPlus v4.7

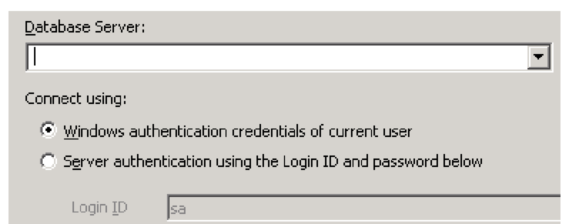
PART A – INSTALLATION

The guide below goes through the steps needed to install *ReportsPlus v4*. If the machine that you are installing on has a previous version of ReportsPlus, please remove this first before continuing.

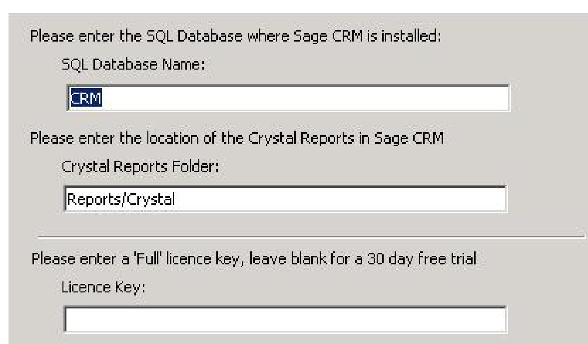


Note: You must have .NET2 and Crystal Reports 2008 installed before you install ReportsPlus, otherwise the installer will refuse to continue

- Run the new ReportsPlus v4 setup installation wizard and follow the steps below
- Click **Next** on the introduction screen and on the following screen, **accept** the licence agreement and click on **Next**
- From the drop down box, select the (Web) installation of Sage CRM (default installation is normally called CRM) and then click **Next**



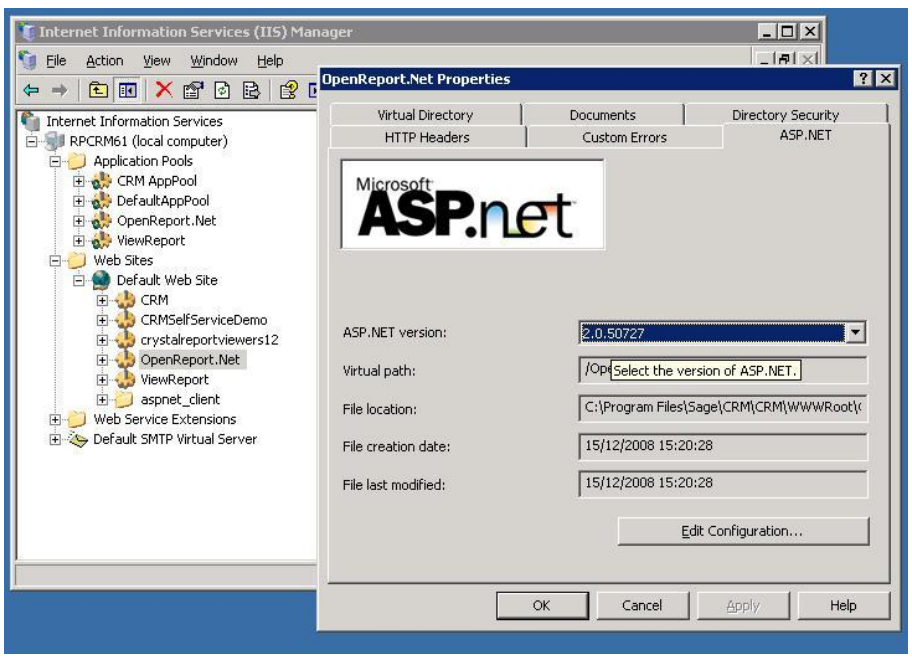
- Now select the name of the database server in which Sage CRM has installed the data. Followed by whether or not to use Windows authentication or the standard SQL server logon details.
- Then click on **Next**
- The first field is the name of the database (on the database server mentioned in the previous step) which ReportsPlus is to connect with. (The default is normally CRM)



- The second field on this screen asks where to install the viewer part for ReportsPlus. The default location is *Reports/Crystal* (The web path is for this example is; *<Sage Web Server>C:\Program Files\ CRM\ CRM \ WWWRoot* the IIS server is aware of this location, so you just need to type in everything after the WWWRoot)

- Then click on Next and then Install to complete the installation
- Please ensure the newly created Virtual Directories (OpenReport.NET and ViewReport) in IIS Manager are set to run under ASP.NET 2.0

Note: Please be aware changing will cause an IIS reset, which will temporarily stop SageCRM



PART B – CONFIGURING

- Log into Sage as Administrator (or someone with System Administration rights)
- Then go to **Customisation – Component Manager**
- From here select *ReportPlus v4* in the window at the top left followed by clicking on **Install Component** on the right.
- Then confirm your request by clicking on **Install Component** again at the top right.

- Sage will then run through and install all the elements needed for it to appear within Sage CRM

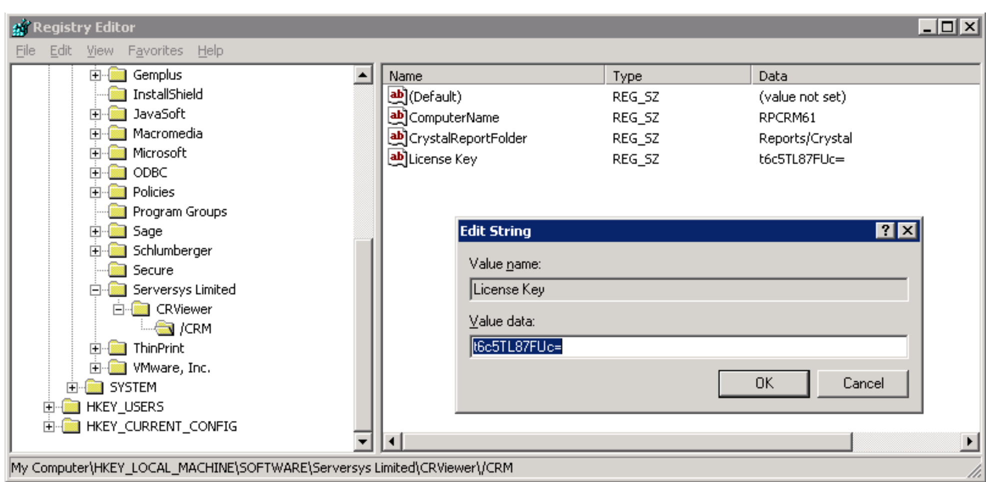
- Once the installation has completed, click on **Continue**

PART C – LICENSING

- Once installed, ReportsPlusV4 will run with a **<u>30 day trial period</u>** (if no licence key is entered at the relevant screen above), **once expired**:
  - a **Full licence** can be purchased by providing the machine/server name
  - or an **Extended Trial licence** can be granted

Both by contacting Serversys Limited.

- Once the Licence Key has been obtained from Serversys Limited you can enter in the registry on the target machine/server. Go to **Start - Run -** `regedit`.



USING REPORTSPLUS

CONFIGURING SQL SETTINGS

You can specify the SQL Settings here that ReportsPlus will use to connect to the SQL Server, as well as turning on/off the Activity Log.

SAGE AND PARAMETERS

You can *pass through* the current user ID from Sage into the crystal report and then use that information to only show the user the information that they are allow to see.

- Setting up the parameter is very straight forward. Just *right click* on Parameter Fields and select **New**
- Name the parameter as *CurrentUser* – All one word with a capital C and capital U. Sage will then automatically populate this field with the user's ID. This can then be use in filters and / or formulas.

Also for use with One Click, you can set up *CParam1* (to *CParam10*) for Sage to pass through more information to help filter the report (e.g. CompanyID) see the section on *One Click* for more details)

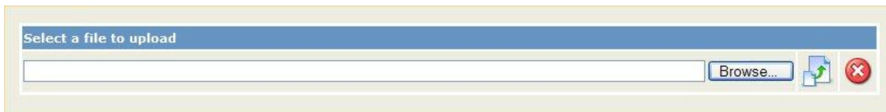
UPLOADING REPORTS

ReportsPlus does come with 5 example Crystal Reports, you will find these installed under the directory that was setup during the Crystal Reports Directory setting, and will be available in the admin area after install (allowing you to set security etc – see later):

- *Case Stage By Company.rpt*
- *Communications By User.rpt*
- *Company Summary.rpt*
- *Lead to Opportunity conversion analysis.rpt*
- *Opportunities By Sales Rep.rpt*

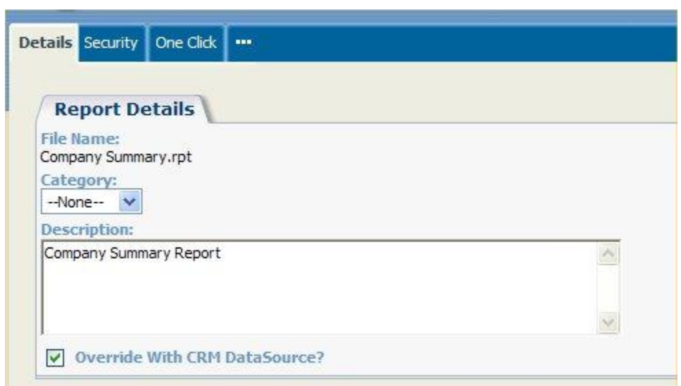
- All the uploading and granting permissions are done from the Administration side of Sage. Go to **Administration – Reports** (a new icon created from installing ReportsPlus)

- This will list all existing reports that have already been uploaded, to upload a new one, click on **New** on the right hand side.
- Click on **Browse** and locate the report file to upload. Then click on the upload icon.



DETAILS

- Once the report has been uploaded, CRM will automatically move onto the next screen, from here you can associate the report with a particular category. By doing this, when the users come to use the reports, they can filter the list of available reports by the category that the reports are assigned to. It does *not* affect any data within the report.
- To add in new categories, go to **Administration – Customisation – Secondary Entities – CRVReport** and edit the Category field.
- Type in a description that will help users know what the report is about, as this will make up the name of the report for them to see.



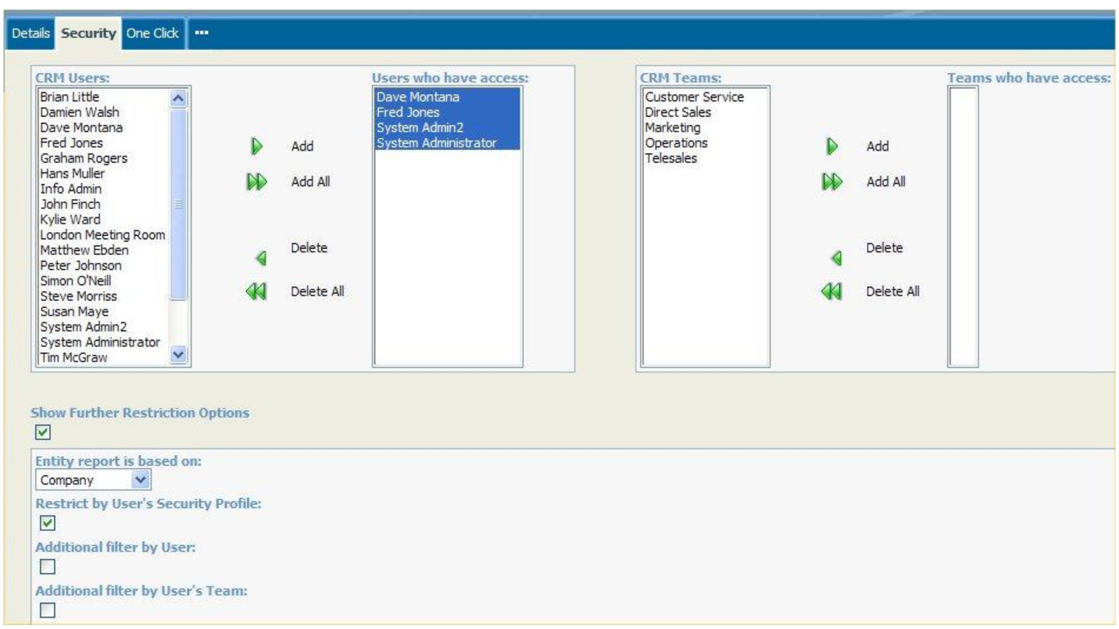
Field	Description
Category	By categories reports, users can then filter list of reports by category
Description	Name of report (with extra detail) that users will see
Override With CRM DataSource	If a report has been built pointing to a different server / database for testing purposes, this option will override the settings saved with the report and replace them with the server / database that CRM is using (set in the Config tab at main the main report level). Otherwise it will just use the username/password to verify connection with the source set in the report itself.

SECURITY

- To allow users to see the report, add their names individually (*CRM Users*) and / or by the Teams to which the users are part of (*CRM Teams*). Select the name that you want and click the **Add** button which appears between the two windows
- Below this are security fields that restrict the data passed to the report. *Entity Report is based on* passes data to the report bases on the user's territory profile. For example, a user who has access to Area 1 only, runs a company / communication report (what communications are there at a particular company) And the company in question is in Area 1 but has communications from both Area 1 and Area 2.

  If the report is based on *Company*, then the report will show all companies, which are in the same territory as the user, and *all* the communications (regardless of what territory the communications belong to)

  If the report is based on *Communication*, then the report will still show all companies that they have access to, but *only* the communications from their territory / territories that they have access to, in this case *only* the Area 1 information.
- *Restrict by User's Security Profile* allows Sage CRM to restrict the data pasted to the Crystal report based on what data the user is normally allowed to see (without this the data the user can see is based purely on the filters within the report itself)
- *Additional Filter by User* uses the security profiles settings of *Created By* and *Assigned To* to control what extra information the user is allowed to see (for example an opportunity normally in a territory outside of which the user is normally able to see, has been *assigned to* them to work on. This extra filter would allow for it to be shown)
- *Additional Filter by User's Team* works the same as *Filter by User*, but it uses the *Team* security profile option instead.



Field / Option	Description
CRM Users	Grant access based on which users have been selected
CRM Teams	Grant access based on team in additional or instead of users

Show Further Restriction Options	Hides / shows the following section
Entity Report is based on	Which territory field to use when passing data through to the report (based on access allowed by the user)
Restrict by User's Security Profile	Use the security profile set up for the user, to control what data is passed through to the report
Additional Filter by User	Uses the *Assigned To* and *Created By* security options in the security profile to grant access
Additional Filter by User's Team	Uses the *Team* security option in the security profile to grant access

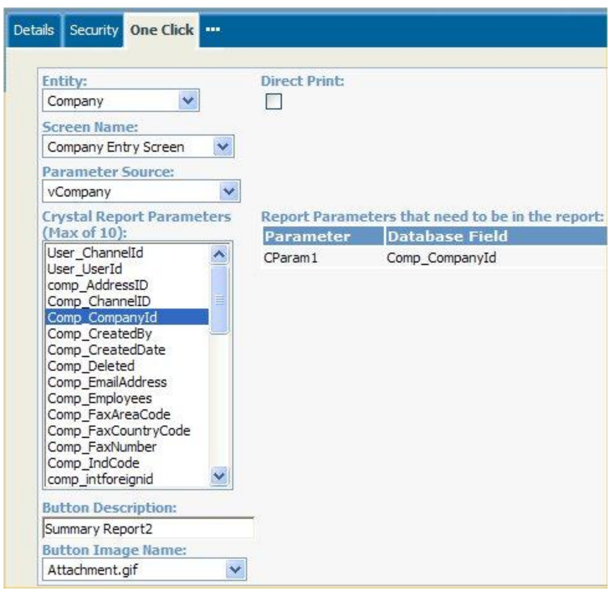
ONE CLICK

One Click allows a report button on any (primary) entity screen. For example on the Company Summary screen. This button would appear on the right hand side along with the other action buttons that exist for this screen.

- First select which entity where the report is going to show
- Secondly pick which screen for that entity you want the button to appear on.
- By selecting the Parameter source, the window below will populate with fields that if selected (max of 10) will be used as filters for the report

Note: The report itself must already have parameters set up as *CParam1* etc

- Underneath this, select the name for the button and what icon to use when it is displayed on screen.



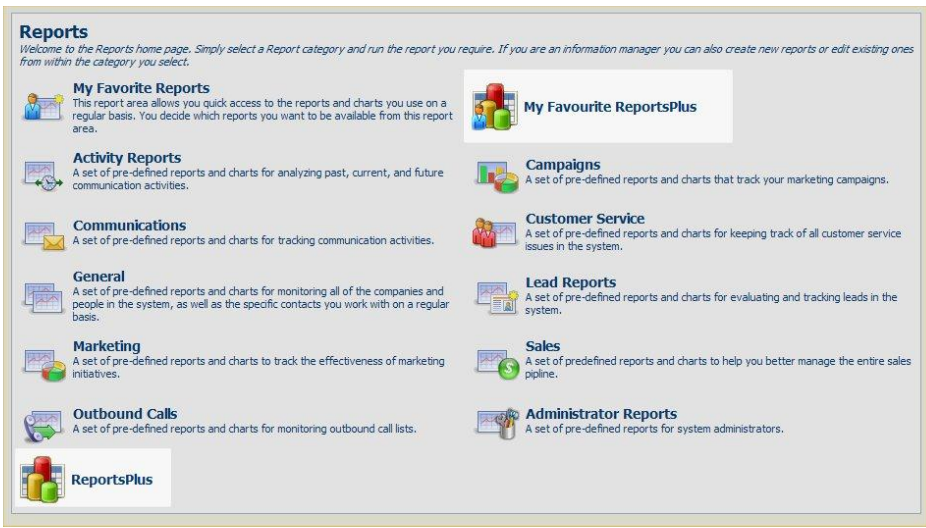
Field	**Description**
Entity	Select the entity of which the screen is related to
Screen Name	Select which screen you want the button to appear on. If unsure of the name, then go to **Administration – Customisation – *Entity*** then select the screen tab and put a tick into Inline Customisation, then search for the screen you want to edit, as you open it (as if to edit it) at the top it will tell you the name of the screen)

Parameter Source	This view will control the fields in the selection window below it
Crystal Reports Parameters	Select which fields you want for Sage to pass through to the report – **NB: The parameter(s) must already be created in the report in order for Sage to pass the information through to it / them**
Button Description	The name of the button when it is shown on screen
Button Image Name	The look of the button when it is shown on screen
Direct Print	Will send the report directly to the default printer of the user instead of opening it up on screen

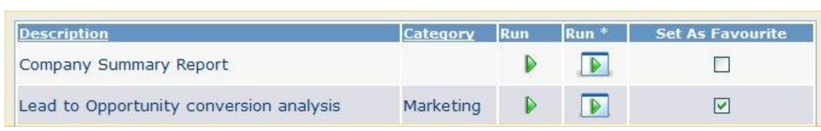
VIEWING REPORTS

- To view Crystal Reports, go to the *Reports* on the main menu

Note: The users account must be set up to see Reports. *Enterprise* allows the user to see all the preinstalled Sage Reports along with the new *ReportsPlus* category.



- From the main section of reports click on the category marked as *ReportsPlus*

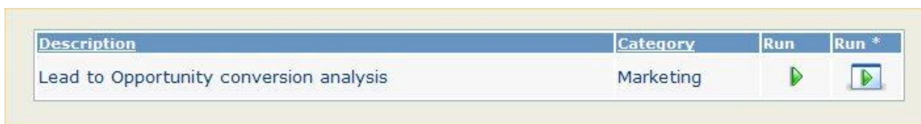


- All the reports that you have access to see will be listed here. If the list is too long to make finding the report you want easily, then on the right hand side you can select the category to help shorten the list.
- Once you have found the report that you want to run either click on the green arrow, this will cause the report to open up in the same window as Sage CRM, else you can click on the icon of a green arrow in a window, this will cause the report to open up in it's own separate Internet Explorer window (as shown below).

Note: You must allow popups for this website in order for the report to open in a separate window

- If this is a report you run often, and there are lots of other reports in here, you can put a tick into the *Set As Favourite* field. By doing this, next time you come to the reports section of Sage, go to the **My Favourite ReportsPlus** section and you'll find all the reports that you have ticked within.

Notice in the screenshot above that only the *Lead to Opportunity conversion analysis* report has the tick, below is the list of report(s) within *My Favourite ReportsPlus*, to remove a report just return to the *ReportsPlus* section and remove the tick from it

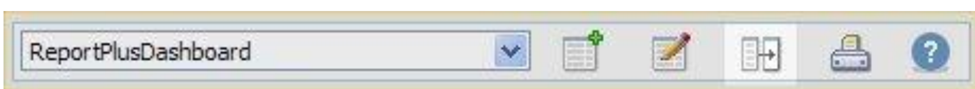


Description	Category	Run	Run *
Lead to Opportunity conversion analysis	Marketing		

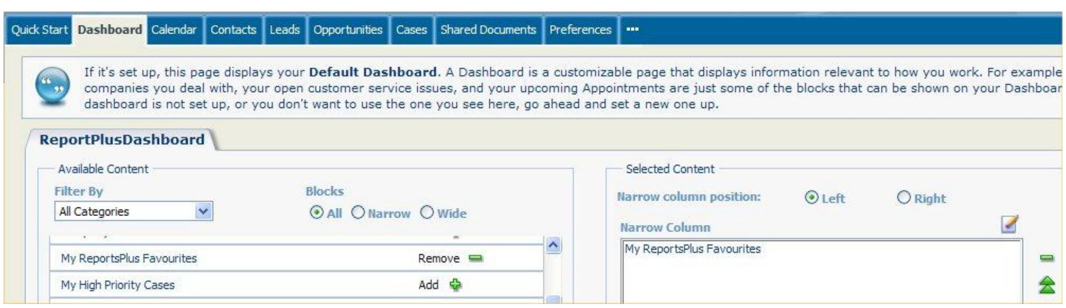
DASHBOARD BLOCK

The *My Favourite ReportsPlus* category can also be added to your dashboard in *MyCRM*.

- Simply go to **MyCRM** from the main menu and select the *Dashboard* tab across the top.
- Click on the *Modify Dashboard* icon

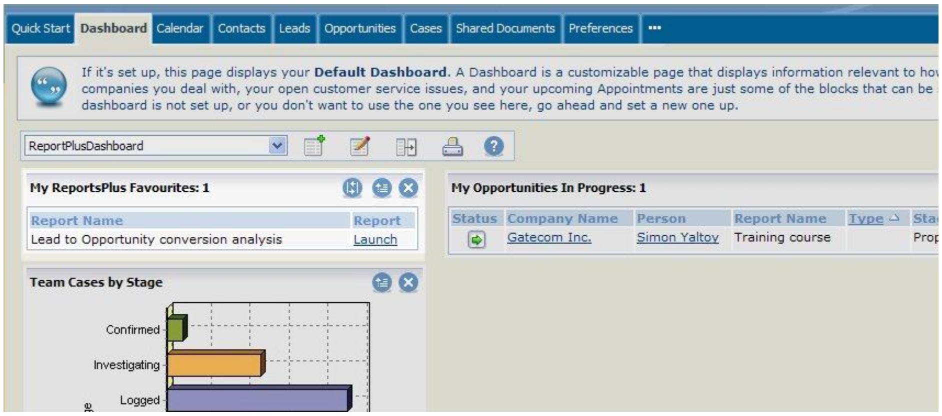


- Then from the list of items, select *My ReportsPlus Favourites* by clicking on the **Add** button to the right of it.



- Then click **Save**

A table should appear on your dashboard containing a list of reports that are in your favourites, to run any of them, click on the **Launch** button to the right of it.



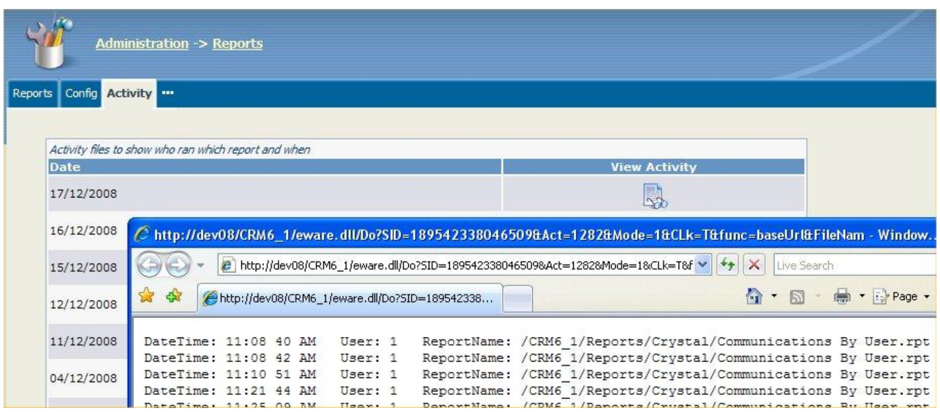
REPORT USAGE

To help administer the reports, ReportsPlus allows the Administrator to view an activity log of when each report was opened and by who.

- Go to **Administration – Reports – Activity**

The log will list by day the usage of the reports (they are kept in the same location as the other system logs. Sage will create a new file every day (and so you will need to manually delete these files from time to time)

- To open a report, just click on the icon on the right hand side



TROUBLESHOOTING

- For an up to date list of things to look out for when troubleshooting, go to http://forum.crmaddonstore.com