

OVERVIEW AND INSTALLATION GUIDE

REPORTSPLUS VERSION 3.0

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WHAT'S NEW IN VERSION 3

- Added separate Application Pool for OpenReport.Net virtual folder
- When editing an entry in the Report section, you are now able to upload a file to replace the existing report
- When adding a new Report, the *description* is defaulted as the report name and defaults the user as the user who uploaded the report

PRODUCT FEATURES

Easily design, deliver and integrate Crystal Reports from your central server with Reports**Plus** for Sage CRM

- Easy Single Source Installation on your CRM Server
- Public Reports available to all users
- In-built team, and user security to control sensitive reports
- Browser 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

Reports**Plus** is backward compatible to version 8.5 reports.

Reports**Plus** can be installed with no licence key as a 14 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
- Sage CRM Mid-Market Edition 5.8+
- Microsoft .NET Framework 1.1 (only for the server)
- Crystal Reports XI Developer Edition (Full installation) *Please note that a licence is shipped with Reports**Plus** for use with Sage CRM*

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

PART A – INSTALLATION

- ▶ The guide below goes through the steps needed to take in install *ReportsPlus v3*. If the machine that you are installing on has a previous version of *ReportsPlus*, please remove this first before continuing.
- ▶ Please make sure when uninstalling the previous version of *ReportsPlus*, that the folders CRViewer and OpenReport.Net are also removed from:
<Sage Web Server>C:\Program Files\CRM\CRM\WWWRoot\CustomPages
- ▶ Run the new *ReportsPlus v3* 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**
- ▶ The next step is to enter in the location of the database part. From the dropdown list select the correct server name server. Followed by whether or not to use Windows authentication or the standard SQL server logon details.
- ▶ After entering all the necessary field, click on **Next**
- ▶ After now that the server has been selected, the next step is to type in the name of the database on that server that Report Plus 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)
- ▶ The last field is for the licence key if you have one. If you leave this empty, you will be able to use *ReportsPlus* for 14 days before it expires. (see end of document on how to enter a licence key after it expires)
- ▶ Then click on **Next** and then **Install** to complete the installation.

Welcome to the InstallShield Wizard for ReportsPlus For Sage CRM version 3.0

The InstallShield(R) Wizard will install ReportsPlus For Sage CRM version 3.0 on your computer. To continue, click Next.

ReportsPlus
for Sage CRM MME

WARNING: This program is protected by copyright law and international treaties.

PART B – CONFIGURING

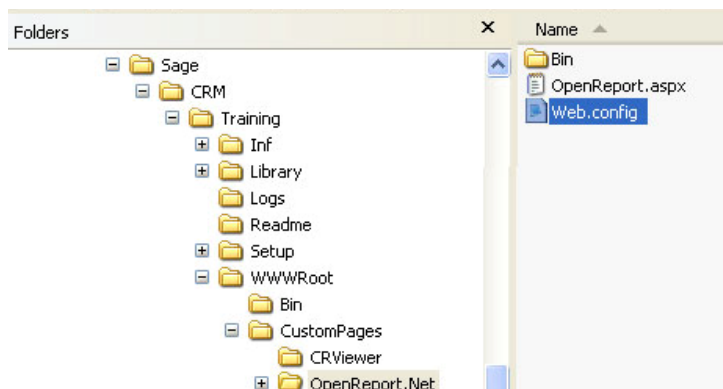
- ▶ Log into Sage as Administrator (or someone with System Administration rights)
- ▶ Then go to **Customisation – Component Manager**



- ▶ From here select *ReportPlus for Sage CRM* in the window at the top left followed by clicking on **Install Component** on the right.
- ▶ Sage will then get you to confirm your request by clicking on **Install Component** again at the top right.



- ▶ Once the installation has completed, click on **Continue**
- ▶ Open up Windows Explorer and navigate to;
 C:\Program Files\Sage\CRM \<Sage Web Server>\WWWRoot\CustomPages\OpenReport.Net



- ▶ When inside, open up Web.config in Notepad

```
<configuration>
  <appSettings>
    <add key="SQLUser" value="sa" />
    <add key="SQLPassword" value="" />
    <add key="RedirectURL" value="../Training/CustomPages/CRViewer/ReportsAdmin.asp"/>
    <add key="CRViewerPath" value="../Training/CustomPages"/>
  </appSettings>

  <system.web>
```

- ▶ Inside this file, enter in the *SQLUser* (username), *SQLPassword* (password) to access the database, *RedirectURL* - the directory where Reports Plus was installed into FROM the Sage Server Name (normally this be from (and including) the second CRM – e.g. C:\Program Files\Sage\CRM\CRM\...) only that you must remember to type it in as a webpage and not as a Window Explorer directory (you need to put in forward slashes '/' rather than back slashes '\') and *CRViewer* (the root directory where all the customer pages are). Then save the file.

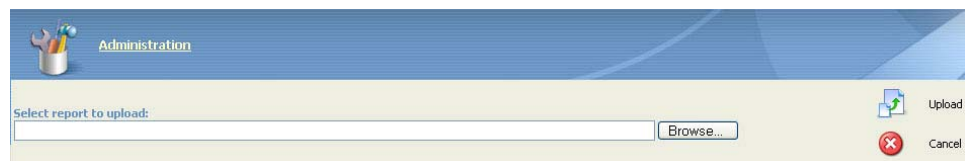
USING REPORTSPUS

UPLOADING REPORTS

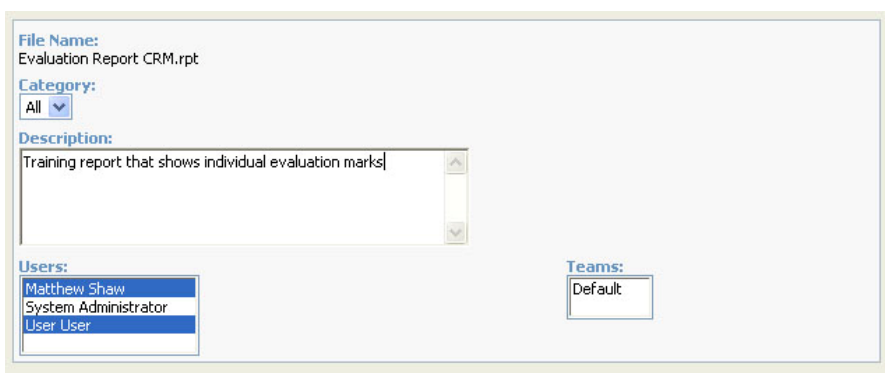
- ▶ Back in Sage CRM – from the Root menu of the Administration section. There is now an extra option called *Reports*. You use this area to upload the Crystal Reports into Sage CRM. Select this option.



- ▶ This screen will list all of your reports. To add one to the list, click on **New** on the right hand side.



- ▶ Click on **Browse** and locate the report file to upload. Then click on **Upload**



- ▶ From the first drop down select the Category that you want to file this under (makes it easier to filter on it later on) – see section about adding new categories after this on how to put extra items in there
- ▶ Type in a description that will help users know what the report is about as the name of the report itself might not be enough.
- ▶ You can then restrict access to this report by selecting users from the users window (and using CTRL to select more than one user) and / or restrict by teams. Then click on **Save**

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. Personal Reports only allows them to see reports that they have made in Sage, 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

Description	Category	Run	Run *
Training report that shows all the comments people entered on their forms	Training		
Training report that shows a summary of all marks	Training		
Training report that shows individual evaluation marks	Training		

Name:

Description:

Category:

- Admin
- Management
- Sales
- Training
- All

Apply Filter

the report you want easily, then on the right hand side you can select some filter items to help shorten the list.

- ▶ Once you have found the report that you want to run either click on the green arrow (Run), 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 (Run *) this will cause the report to open up in it's own separate Internet Explorer window.

ADDING EXTRA REPORT CATEGORIES

- ▶ In the Administration section of Sage CRM, go to *Customisation – Secondary Entities*

- ▶ From this drop down list select the item called **CRVReport** as soon as you select it, Sage CRM will display the fields used for this entity. From here in the third column along (for Category) click on **Selection**) and add in all entries that are required

UPGRADING TO FULL LICENSED COPY

- ▶ Go to the control panel and select **Add or Remove programs**
- ▶ Click on **ReportsPlus For Sage CRM version 3** and then click on **Change**
- ▶ Click on **Next**
- ▶ Select **Repair** followed by clicking on **Next**
- ▶ Enter in the SQL server and the login details to access it. Then click on **Next**
- ▶ The following screens requires you to enter in the name of the database on the SQL server and the last file is where you input your new licence for **ReportsPlus**
- ▶ Then click on **Next** followed by **Finish**

TROUBLESHOOTING

- ▶ I have completed the install and I can see my reports listed in Sage CRM but I just get a page of HTML text when I try to run a report
- The .Net Framework has not integrated correctly with IIS;

Go to the control panel and select **Administrative Tools**. Then select *Internet Information Services*. Navigate down to your Sage CRM Website then *right click* and select **Properties**

Click on the **Configuration** button towards the bottom of the Virtual Directory Tab

Check there is no aspx entries in the display list of extensions. Then run the following command from the Start menu

```
"%windir%\Microsoft.NET\Framework\<version>\aspnet_regiis.exe" -I
```

Note: That you will need to first use Windows Explorer to find out what version to type in the command line. For further details please go to;

<http://support.microsoft.com/default.aspx?scid=kb;en-us;306005>
- ▶ I have completed the install and I can see my reports listed in Sage CRM, but when I run a report I get an error message opening the report
- The ReportsPlus configuration file has the wrong SQL login details (see the last item in the above section entitled *Part B – Configuration*)
- Open the report using Crystal Designer and check that the database location is set to the correct server using the OLEDB ADO driver for Microsoft SQL Server

PRODUCT UPDATES

Product updates can be found the ftp://213.208.117.83

The username is *sageplus* and the password is *updates*