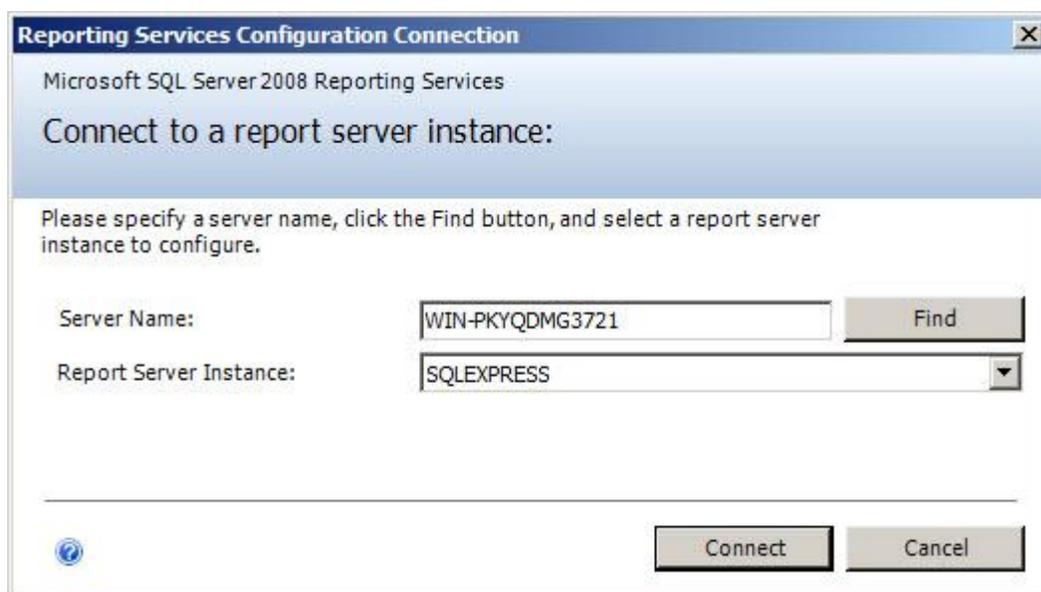


# CONFIGURING SQL SERVER 2008 REPORTING SERVICES FOR REDHORSE CRM

This article will walk you thru the initial configuration of SQL Server Reporting Services.

## Choosing an Instance

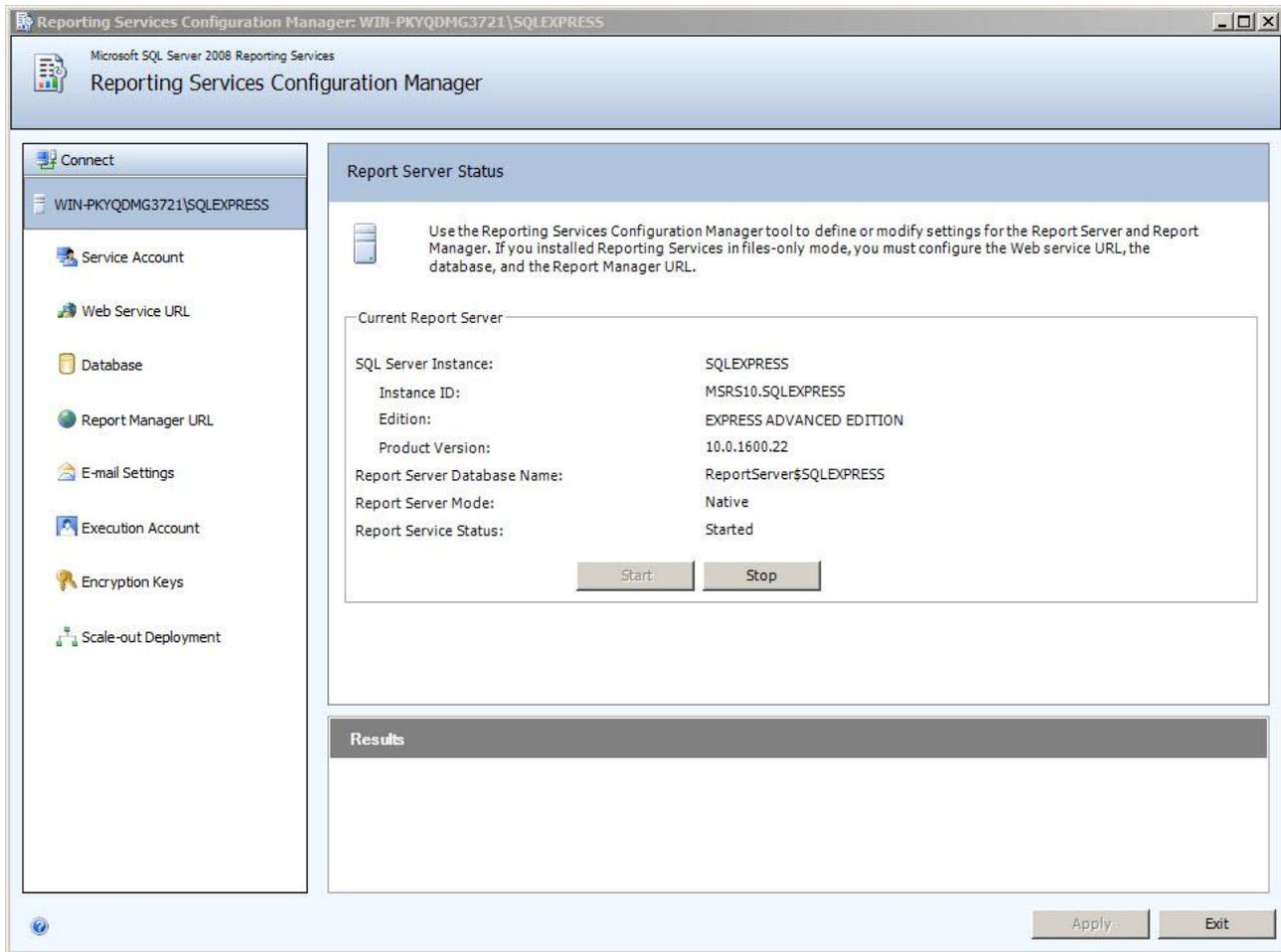
Reporting Services is configured using the SQL Server Reporting Services Configuration Manager, which is found by going to Start, All Programs, Microsoft SQL Server 2008, Configuration Tools, Reporting Services Configuration. The first time you run this tool, you will be asked to select the correct instance of SQL Server to configure. Select the correct instance of SQL Server 2008.



## Server Status

You will then be able to view the configuration manager and set up Reporting Services. This screen provides you with the basic information of the instance, and its status.

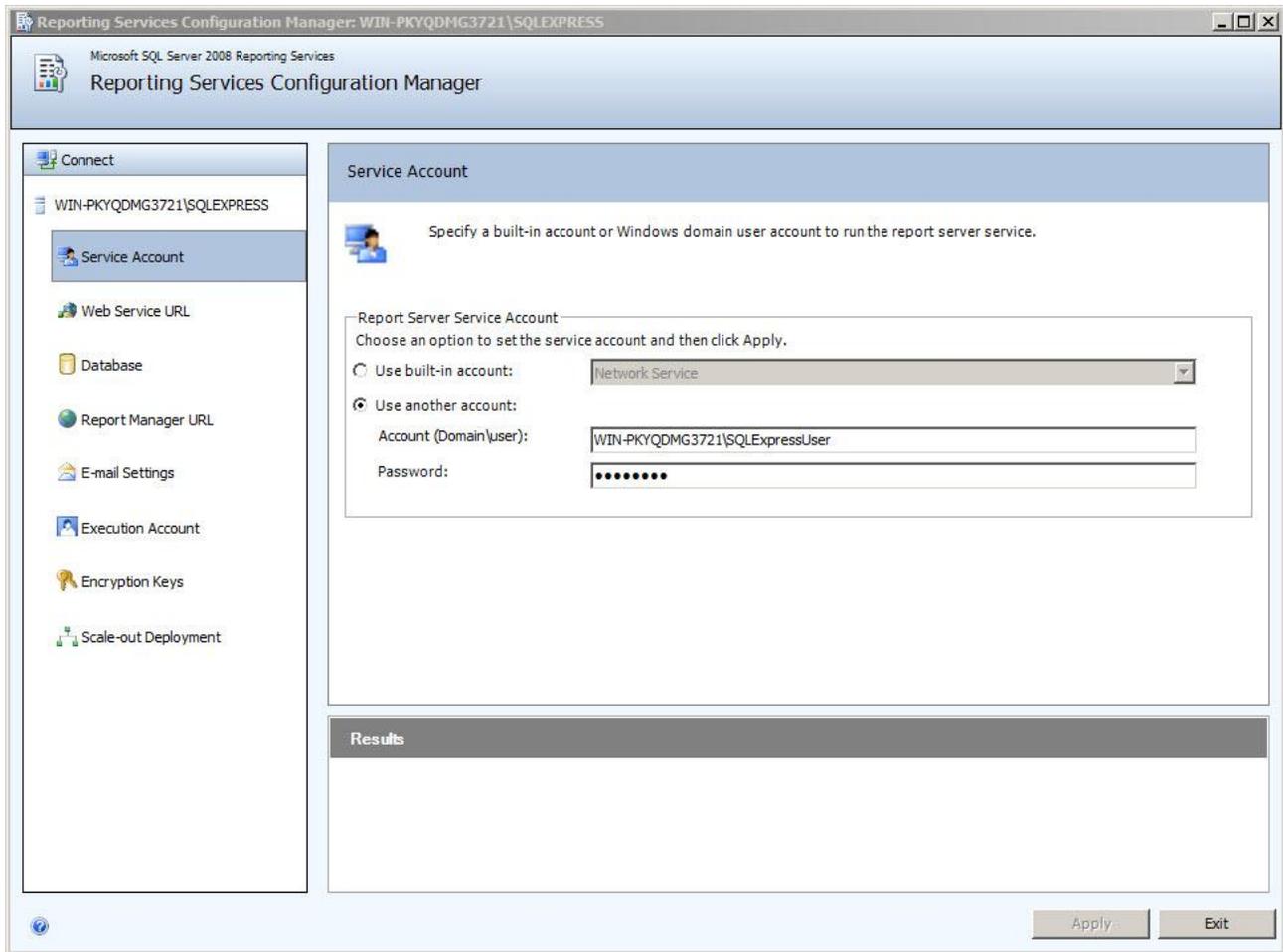
This screen only allows you to view the instance you are connected to, and gives you control over the running status of the service.



## Windows Service Identity

The Report Server Windows service runs under the account you appointed when installing SQL Server Reporting Services. You can use this configuration tool screen to change that setting post-install. As is the case with any of the SQL service accounts it is recommended you use the appropriate configuration tool to change security settings or stop services to ensure that any dependent settings are automatically changed as well.

For Windows XP Home, you would be using the built-in account called Network Service.



## Web Service URL

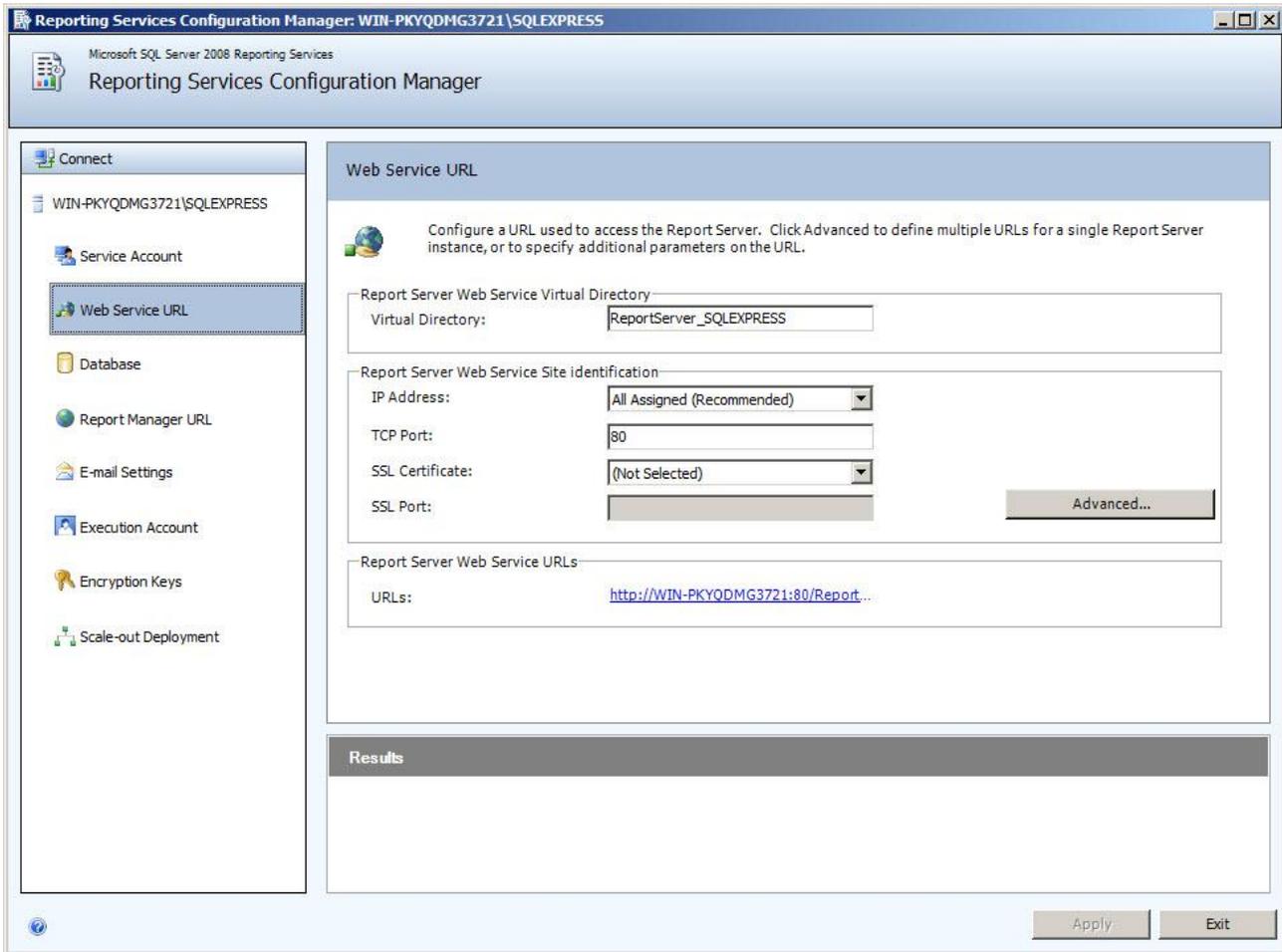
SQL Server Reporting Services' Report Server and Report Manager are ASP.NET applications that are accessed via a URL composed in the following manner: `http://server/website/virtual_directory` (`https://server/website/virtual_directory` if the server in question is configured for Secure Sockets Layer (SSL).) The server component can be a server name, fully-qualified domain name, or even localhost. It all depends upon how you're planning on accessing Reporting Services.

If Reporting Services will be accessed from here...	Server Name component in URL will be:
Within your local network or Intranet	The Server (DNS) name
Remotely via the Internet	A fully-qualified domain name

Locally on the same server

localhost

The virtual directory is the only component of the URL that you're able to configure within Reporting Services. The default values are presented below. Click the Advanced button to define multiple URLs or to specify additional parameters on the URL.



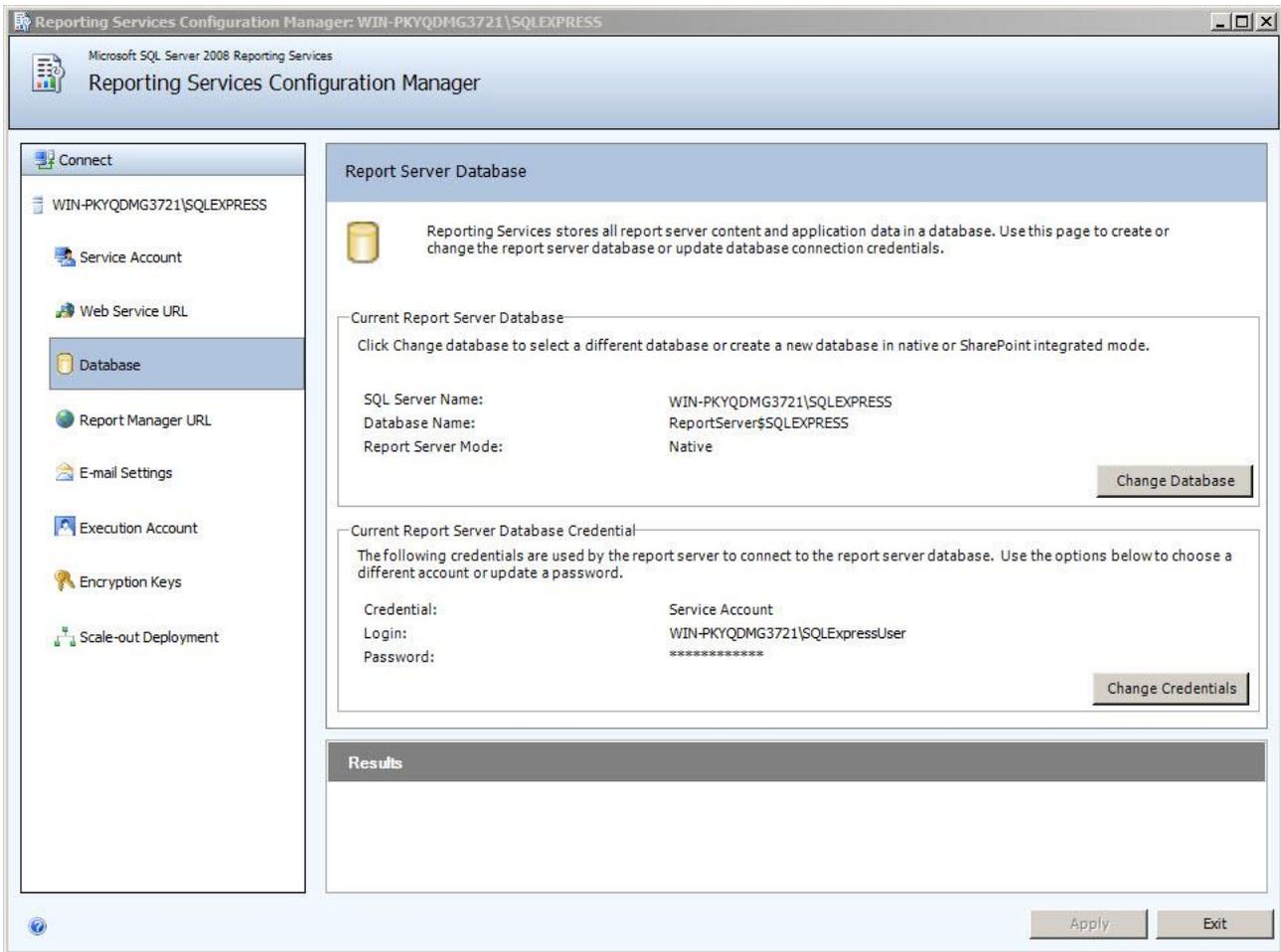
## Database Setup

Installing SQL Server Reporting Services will automatically create the databases that Reporting Services requires to function properly. You are able to create a new ReportServer and ReportServerTemp databases from within this form. Optionally, you can connect to an existing instance of these databases. This is convenient when migrating Reporting Services instances to new hardware or upgrading existing instances of Reporting Services.

Clicking the Change Database allows you to add a new Report Server database or connect to an existing database. Clicking Change Credentials allows you to change the credentials used for logging into that database.

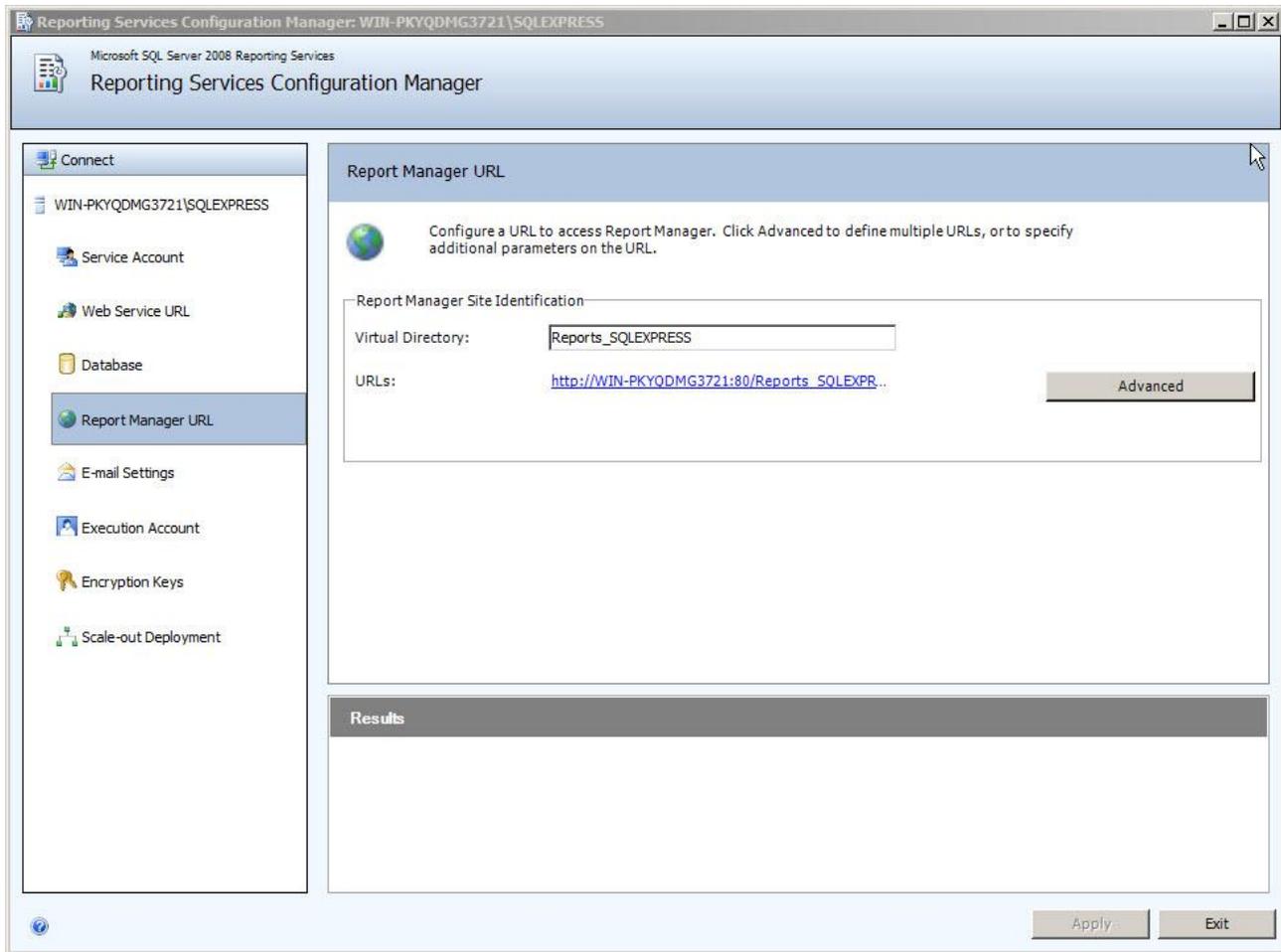
RedHorse Systems, Inc.  
support@redhorsesystems.com  
www.redhorsesystems.com

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## Report Manager URL

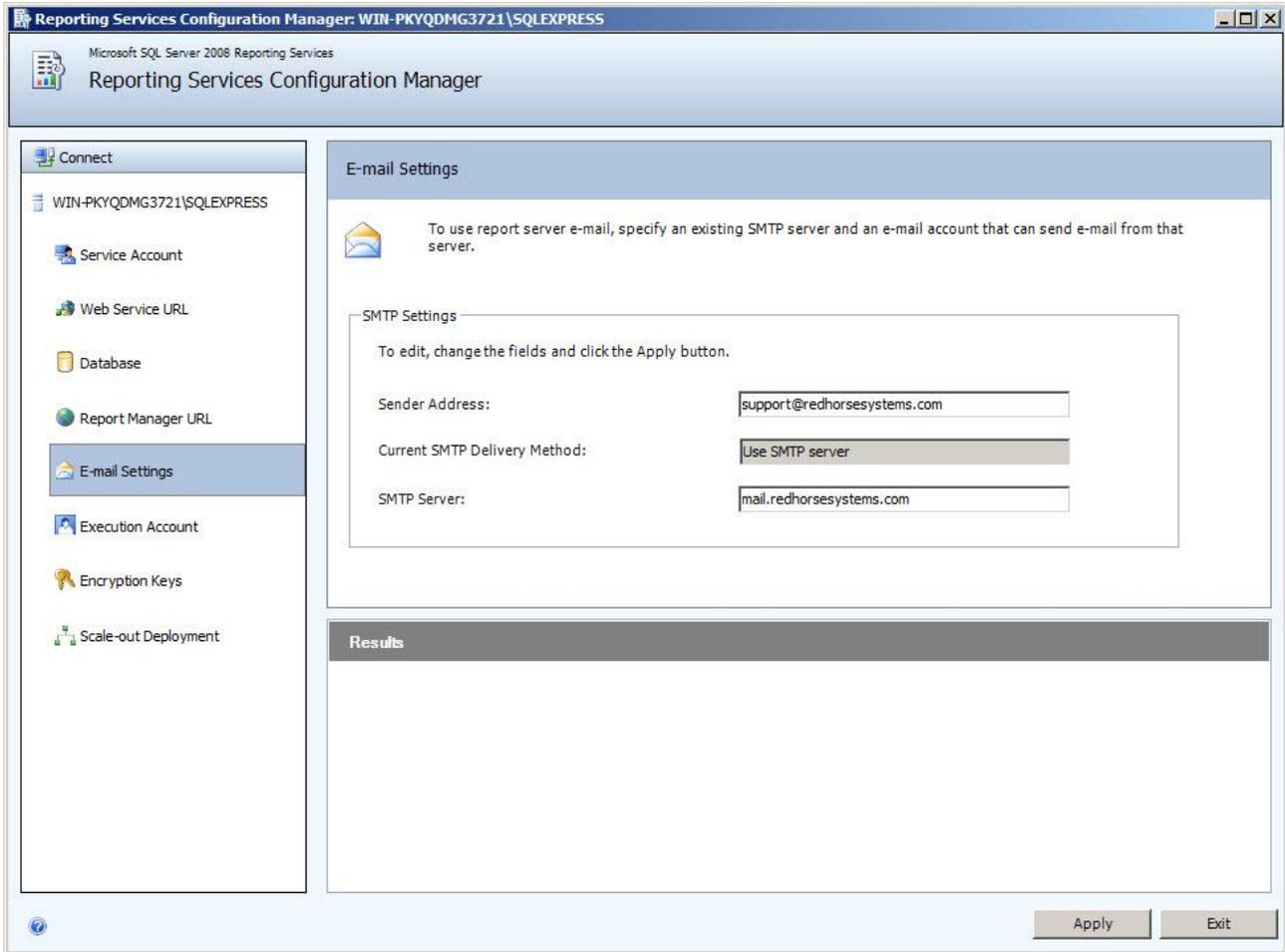
In addition to the virtual directory name, you are also able to assign the virtual directory to an existing website or a default website.



Use the Advanced button to define multiple URLs or to specify SSL parameters.

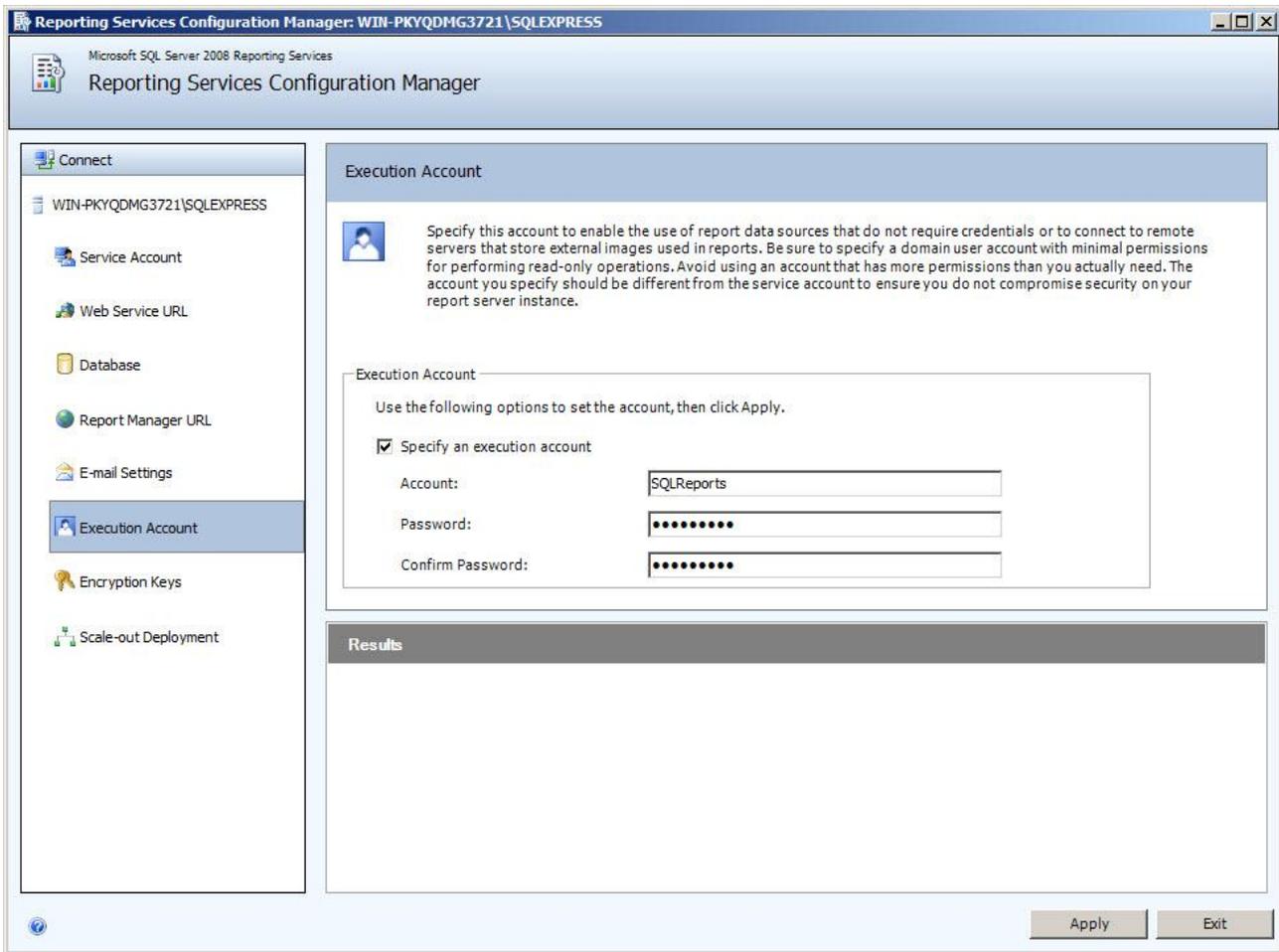
## Email Settings

One of the most-important services provided by Reporting Services is the ability to schedule and deliver reports via email. As is the case with Microsoft SQL Server 2008 Database Mail, this is accomplished via the Simple Mail Transport Protocol (SMTP). In order to properly configure this component of Reporting Services, you'll need to supply a sender address, and the SMTP server/gateway to use. Though a textbox is supplied for deliver method, the only method allowed in Reporting Services is SMTP. The only requirement is that the sender email address has permissions to send email from the SMTP server you're specifying and that the SMTP server is a local server or SMTP server on your network. The email address you supply will be in the "From" field of all outgoing email from this Reporting Services instance.



## Execution Account

Setting up an Execution Account allows Reporting Services to operate under certain circumstances when credentials are not supplied. Connecting to data sources that do not require authentication, such as XML for instance. Best practices states that this account should be different from any of the service accounts set up previously for Reporting Services. Any Windows account is acceptable for use, though the login should have sufficient rights to read locations holding the data or files you'll be accessing. It will also need to have network login permissions.



## Encryption Keys

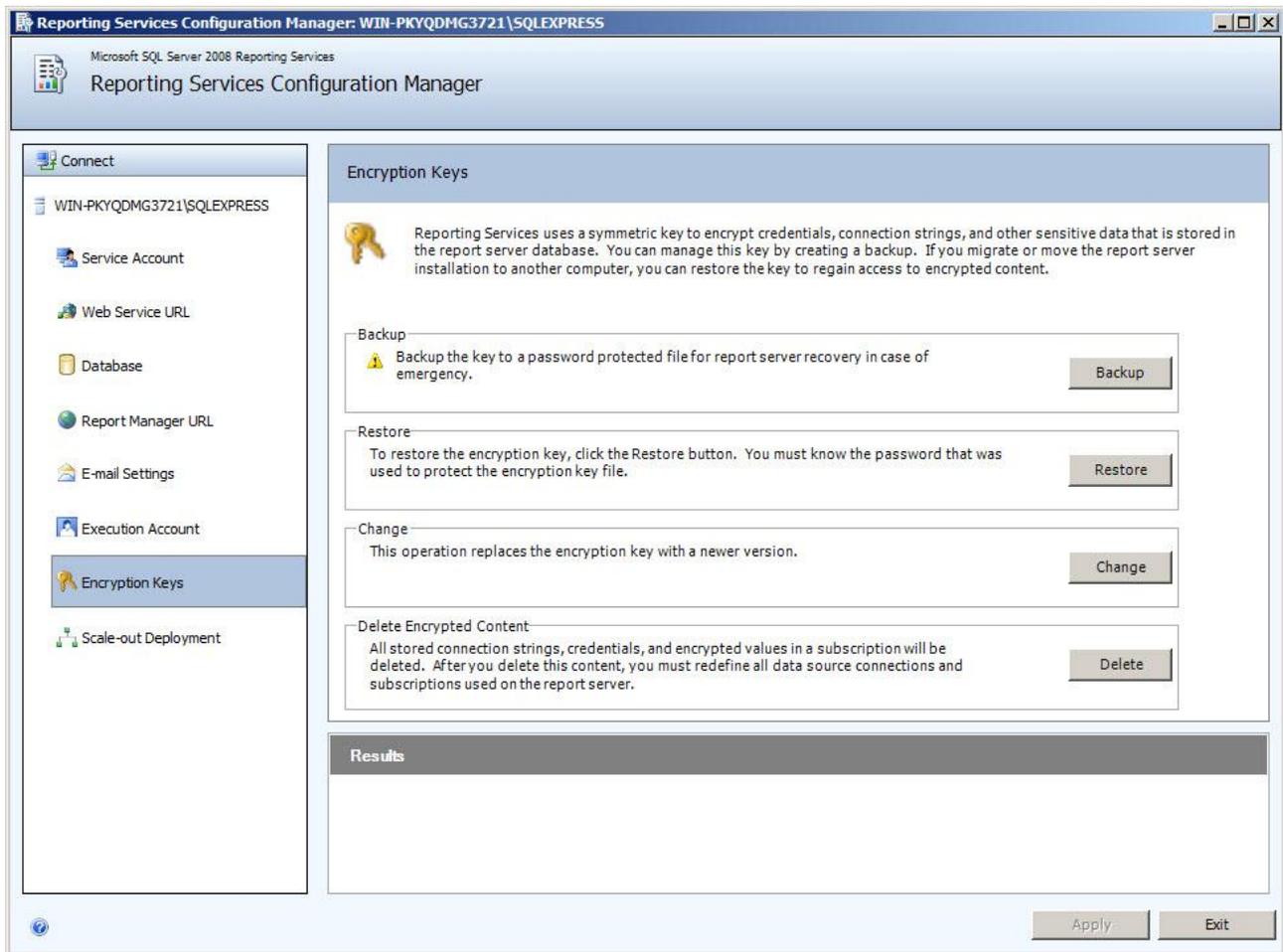
This form allows you to backup, restore, or make changes to the symmetric key that is used for encryption and decryption of data in this instance of Reporting Services. The key is initially generated and activated upon creation of the ReportServer database. Under certain circumstances, you'll need to make sure you have a backup copy of the key. Such circumstances include:

- Migration of a Reporting Services installation to a new server
- Changing the service account associated with the Report Server Windows service
- Configuration of a new report server in order to re-use an existing report server database previously established with another instance of Reporting Services

Restoration of an encryption key is required if you make Reporting Services service account changes without using the Reporting Services Configuration tool or if you're migrating Microsoft SQL Server Reporting Services to a new server. According to Microsoft: You should restore a symmetric key only if it is the same key that is currently used

to encrypt and decrypt data in the report server database. If you restore a symmetric key that is not valid, you will no longer be able to access sensitive data. If this should occur you would need to delete the key and recreate it; both tasks would be accomplished via this form. You will be prompted when deleting the symmetric key. It is important that you are aware of the consequences before proceeding.

The process of deleting a symmetric key is not reversible. When you delete a key, you delete all data that is encrypted with the key. This would include, but not be limited to, such valuable data as subscriptions, report data sources, and connection strings. It is also important to note that only the Report Server Windows service account is able to unlock and use the key. If you make changes to this service you'll be unable to use the key.

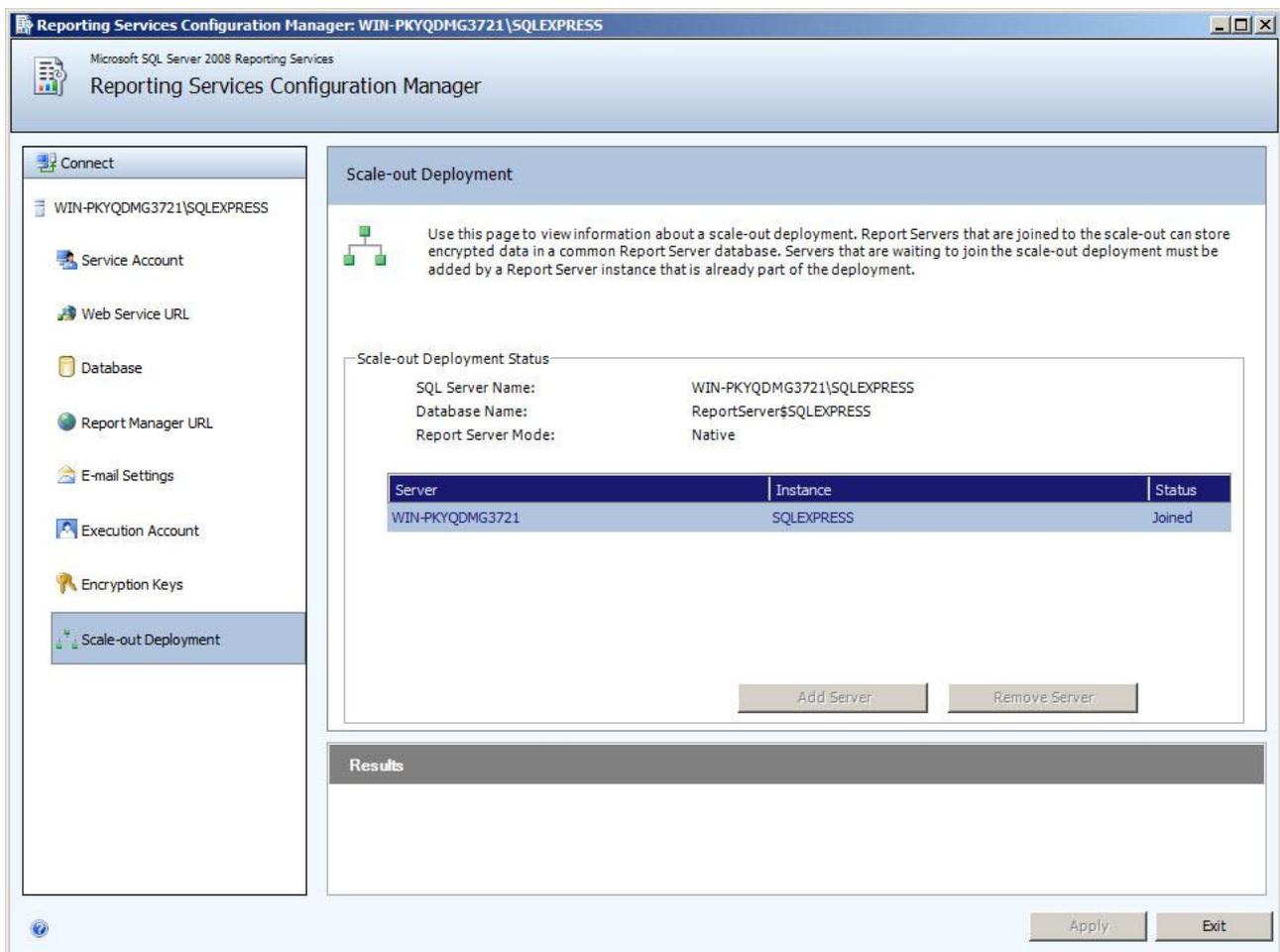


## Scale-Out Deployment

A scale-out deployment refers to two or more report server instances that share a single report server database. This configuration is used in the following scenarios:

- As a prerequisite for load balancing multiple report servers in a server cluster. Before you can load balance multiple report servers, you must first configure them to share the same report server database.
- To segment report server applications on different computers, by using one server for interactive report processing and a second server for scheduled report processing. In this scenario, each server instance processes different types of requests for the same report server content stored in the shared report server database.

To configure a scale-out deployment, start with two or more report server instances that are all connected to the same report server database. After all of the instances are installed, you connect to the first report server and then use the Scale-out Deployment page to join each additional instance. Only a report server that is already initialized to use a database can initialize additional nodes.



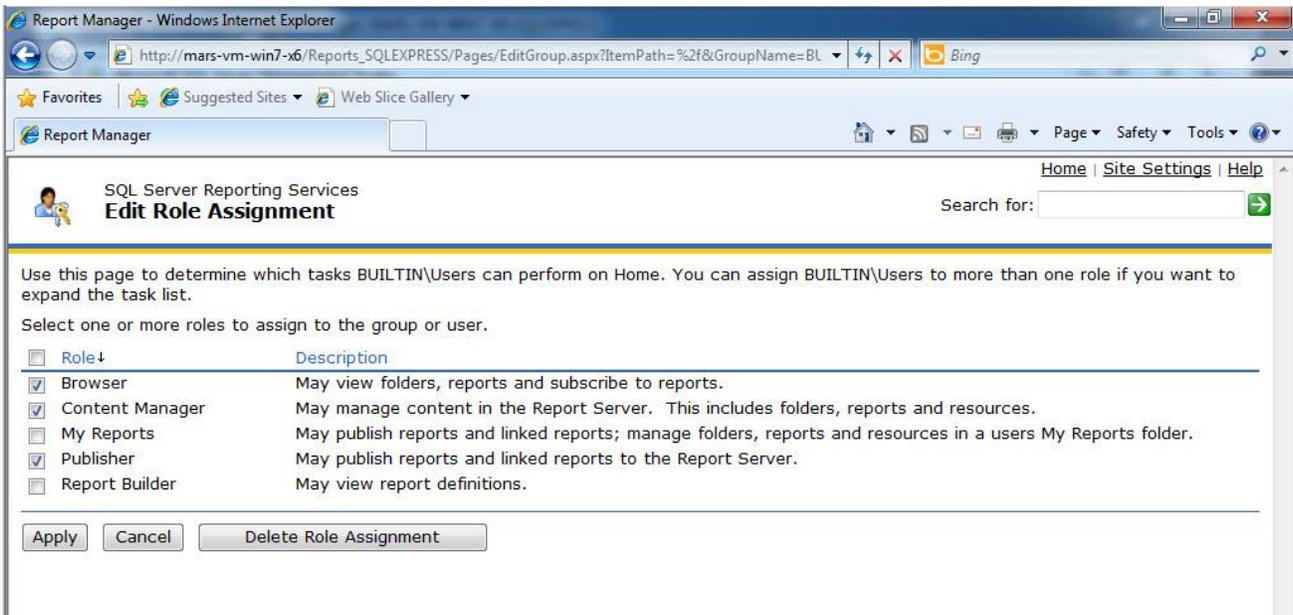
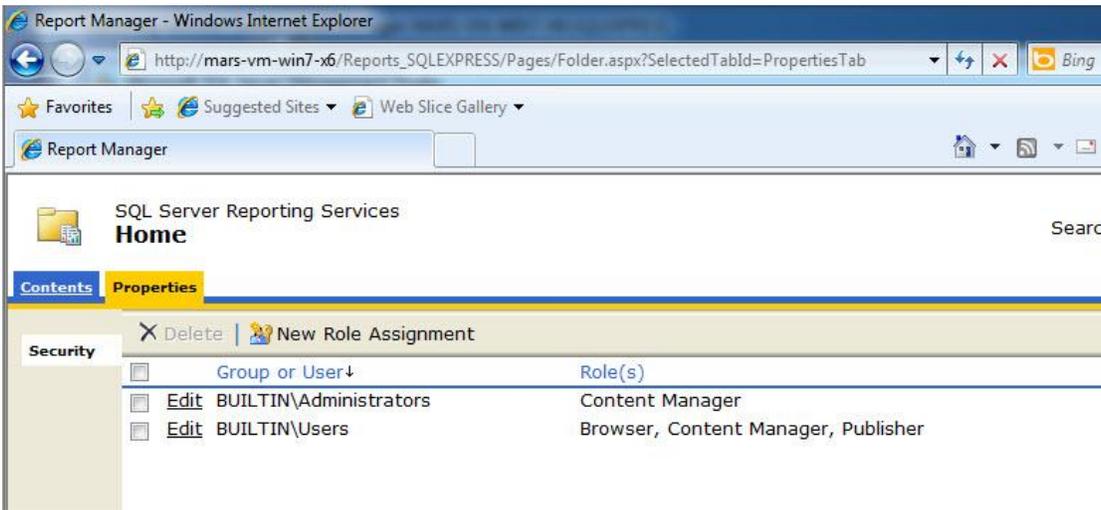
At this point, if you've completed the forms in a manner that correctly conforms to your environment you should be ready to continue on with building and deploying reports to this instance of SQL Server Reporting Services.

# User Security

If users experience permissions errors when deploying reports to RedHorse or running them within RedHorse, security settings may be adjusted in Reporting Services to allow appropriate access to perform these functions.

First launch Report Manager by clicking on the Report Manager URL in the Report Server Configuration Manager. If you are not able to launch the Report Manager URL when logged in as a normal Windows user, you will be able to launch it when logged in as Administrator.

Go to the Report Manager, Site Settings, Properties tab. Click New Role Assignment, type in the Windows user name or Windows user group and select the Browser Role and the Publisher Role. Then Apply the new Role configuration. At that point, that Windows user or group member should be able to run reports in RedHorse.



## SSL

If your Report Server is configured to require a secure server, you may receive a message when deploying reports stating that it can not deploy to a secure server with HTTPS. To turn SSL off in order to deploy reports, open the file RSReportServer.Config file and set the SecureConnectionLevel value to 0.

For more information see these Microsoft KB articles:

<http://msdn.microsoft.com/en-us/library/ms157273.aspx>

<http://msdn.microsoft.com/en-us/library/ms154709.aspx>