

**Portrait** SOFTWARE <sup>TM</sup>



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## Installation of HQ Reports for Portrait Dialogue

Version 1.0

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# About this document

## Purpose of document

This document describes how to install the HQ Reports for Portrait Dialogue under SQL Server Reporting Services (SSRS).

## Who should read this document?

System administrators who want install or consider installing HQ Reports for Portrait Dialogue.

## What is HQ Reports for Portrait Dialogue?

Portrait HQ Reports for Portrait Dialogue is a set of standard reports which can be installed to run as part of Microsoft SQL Server Reporting Services (SSRS).

These reports provide information about key data for dialogs, messages, questionnaires and more from within Portrait Dialogue.

## Related documentation

- *Portrait HQ Reports User Guide*



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# 1 Installation of HQ Reports

## 1.1 General Considerations

The purpose of this chapter is to explain how the installation scripts are organized and what exists inside each folder.

## 1.2 Assumptions

The reports installation script will work assuming the following:

- SQL Database instance allows Windows Authentication.
- SQL Database allows remote connections (SQLCMD command is used).
- The script must be run on the server where SQL Server Reporting Services is installed
- The user that runs the script has privileges in both SQL and Reporting servers (Administrator is recommended).
- **RS.EXE** tool is in PATH (RS.EXE ships with any standard SQL Server installation).
- The user knows the following information about the environment
  - SQL Database instance name
  - Portrait Dialog System Database name
  - Reporting Services installation path
  - Report Server URL

## 1.3 Syntax

To perform a complete installation, open the **ReportsInstall** folder in a command prompt, and run the following batch file:

```
Install.bat "SQLServerInstance" "Database Name" "Reporting Services  
BIN folder path" "Reports Database Name" "Report Server URL"
```

The parameter **Database Name** is the name of the Portrait Dialogue system database.

The parameter, **Reporting Services BIN folder path**, refers to the installation path of SSRS, for example:

```
C:\Program Files\Microsoft SQL Server\MSSQL.3\Reporting  
Services\ReportServer\bin
```

The parameter **Reports Database Name** is the name of the database where reporting helper functions are installed. If you have installed Portrait HQ, this must be the same database as the Portrait Data Warehouse (usually PortraitDW). If not, you should specify the same as the Portrait Dialogue system database.

The last parameter, **Report Server URL**, is optional; if it is not provided, it will default it to:

```
http://localhost/ReportServer
```

which is the default SQL Server Reporting Services Server URL. It is important to use double quotes for every parameter.

## 1.4 Script Contents

This installation will perform the following operations:

1. Generate SQL Scripts with the provided Database Name (this name is different in each installation so the SQL Scripts must be generated).
2. Copy the DLL files that the reports use for Localization purposes.
3. Create "**PortraitReports**" database, where all the stored procedures will be created.
4. Execute all SQL scripts.
5. Deploy **Portrait\_DS** and **ReportsHelper\_DS** shared Data Sources.
6. Deploy all Reports and resources in the correspondent Reporting Services Folders.

**Install.bat** batch script is actually calling three inner batch files, one for the SQL scripts execution (in the **SQLScript** folder) another for the actual reports deployment (In the **RSScript** folder) and one for generating the SQL scripts.

Each of these separate folders contains another batch file that can be used to perform each of the steps separately - following the same syntax.

### 1.4.1 The SQLScriptSource Folder

This folder contains a batch file named **SQLCreateAll**. This file will run a series of SQLCMD commands in order to execute all the **\*.sql** scripts contained in the same folder. After running the script, a log file will be left in the same location.

This script expects one mandatory parameter: the SQL Server Instance Name.

This script needs to be run by a user with database privileges, and the database must be configured to accept remote connections and Windows authentication (see point 2).

### 1.4.2 The SQLScript Folder

This folder is generated automatically. The script will store the customized SQL scripts according to the provided parameters.

### 1.4.3 The RSScript Folder

This folder contains a batch file named **RSDeployAll.cmd**. This script will run a series of VB scripts (**.rss** extension) that use the **RS.EXE** command in order to deploy all reports and data sources in the Report Server. After running the script, a log file will be left in the same location.

This script expects one mandatory parameter:

SQL Server Instance Name

which is used to compose the Shared Datasets) and one optional parameter:

Report Server URL

which if not provided is defaulted to <http://localhost/ReportServer>.

## 2 Accessing the Reports

### 2.1 Launching the Dialog Summary Report

The HQ Reports for Portrait Dialogue contains a main report, called the **Dialog Summary Report**. This report acts as a Welcome Page from which the other reports available can be launched.

The URL for this report is defined under these lines. You may need to replace **localhost** for your server IP or name, and **ReportServer** for your Reporting Services server name, if needed.

<http://localhost/ReportServer/Pages/ReportViewer.aspx?%2fPortraitReports%2fHome&rs:Command=Render>

This URL will launch the report with no parameters. Available parameters to add to this URL are:

&Language=de-DE

&IO=[Boolean] (if not provided, uses the default "True" value)

&PD=[Boolean] (if not provided, uses the default "True" value)

&MyReports=[Boolean] (if not provided, uses the default "True" value)

### 2.2 Selecting Report Language

The display language of the reports can be chosen using a URL parameter as described above. The following languages are available:

Language	URL parameter value (language code)
<b>English (US) (Default)</b>	en-US
<b>French</b>	fr-FR
<b>German</b>	de-DE
<b>Japanese</b>	ja-JP
<b>Portuguese (Brazil)</b>	pt-BR
<b>Spanish</b>	es-ES

**NOTE:** Using the URL parameter when launching a report, applies to all reports, not only the Main Report.

### 2.3 Using the Reports

For using the HQ Reports for Portrait Dialogue and for detailed information about each report, please refer to document **Portrait HQ Reports – User Guide**.