



Adroit Report Suite

Deployment Utility Manual

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1. Introduction

The Adroit Report Deployment Utility will help you with the more complex tasks of managing your SQL Server Reporting Services. It was created to help you create and deploy Report Packs. The utility interacts with SQL Server Reporting Services' Web service.

A Report Pack is a combination of Reporting Services Reports, data sources, components and resources all in one manageable "pack". These packs can be created and imported with the use of the Adroit Report Deployment Utility. Adroit will be making their reports packs available as installation files.

1.1. Adroit Technologies

Since 1992 Adroit Technologies, a company based in South Africa, have been developing SCADA/HMI software solutions for the industrial automation and process control industries. With over 20,000 successful installations, in over 16 countries in the world, Adroit is one of the world's top selling SCADA/HMI products.

Adroit Technologies are a Microsoft Certified Gold Partner Company. This allows Adroit Technologies to stay in regular contact with Microsoft and remain up to date with the latest advancements in software development. All this ensures that Adroit remains one of the leading SCADA packages, both now and in the future.

1.2. Adroit SCADA

A·D·R·O·I·T means skilful, or dexterous, it is also an acronym for "Advanced Distributed Real-time Object-oriented Intelligent Toolkit".

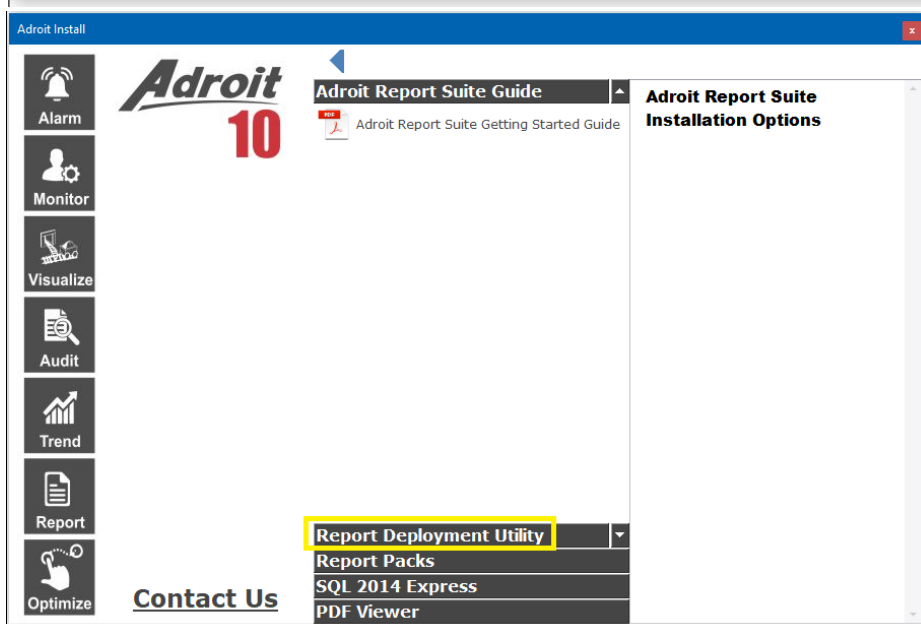
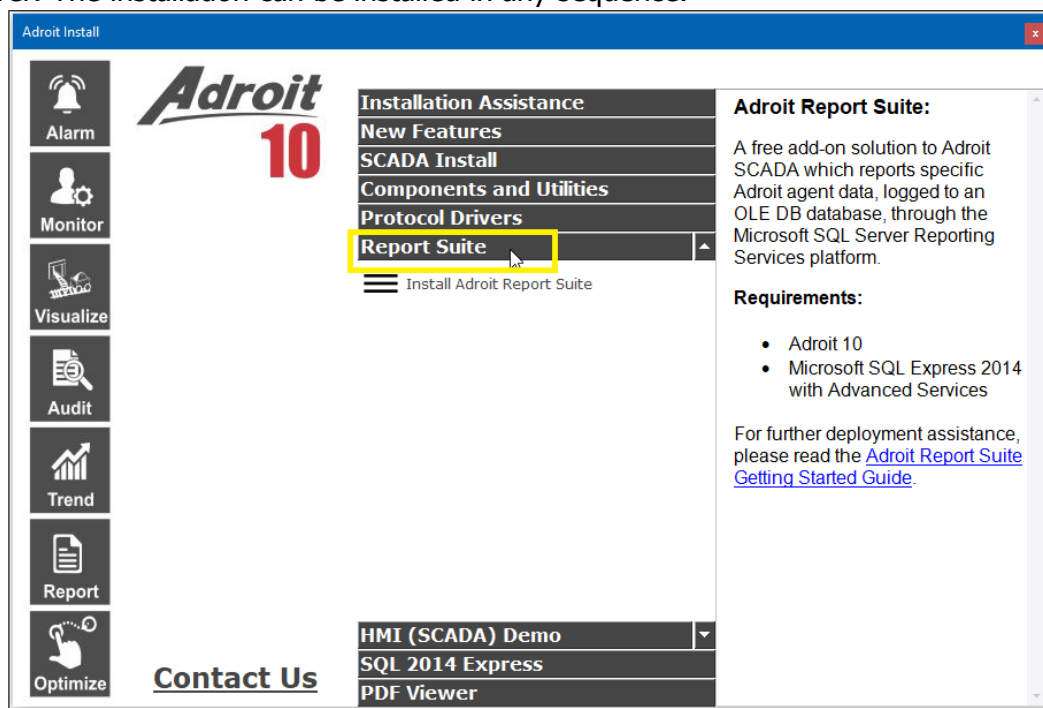
Adroit is a Windows based SCADA/HMI software product that has been developed over a period of more than ten years by dedicated professionals. Robust and flexible enough for the toughest industrial application, Adroit is the ideal platform from which to meet the information needs of a modern control solution.

Adroit is a technologically advanced SCADA (Supervisory Control & Data Acquisition) system designed for process control, manufacturing systems and open automation applications.

Developed specifically for Windows operating systems, Adroit has a flexible object-oriented client server architecture that supports from a standalone implementation to an installation spanning multiple sites.

2. Installation

The Adroit Report Suite installation gives the user options to install the Report Deployment Utility and the available report packs. Installing the report pack simply copies them into the *Program Files* directory. The Report Deployment Utility is then required to deploy the report packs to a selected SQL Reporting Server. The installation can be installed in any sequence.



Once the Adroit Report Deployment Utility is installed, it can be run by clicking on the desktop icon.

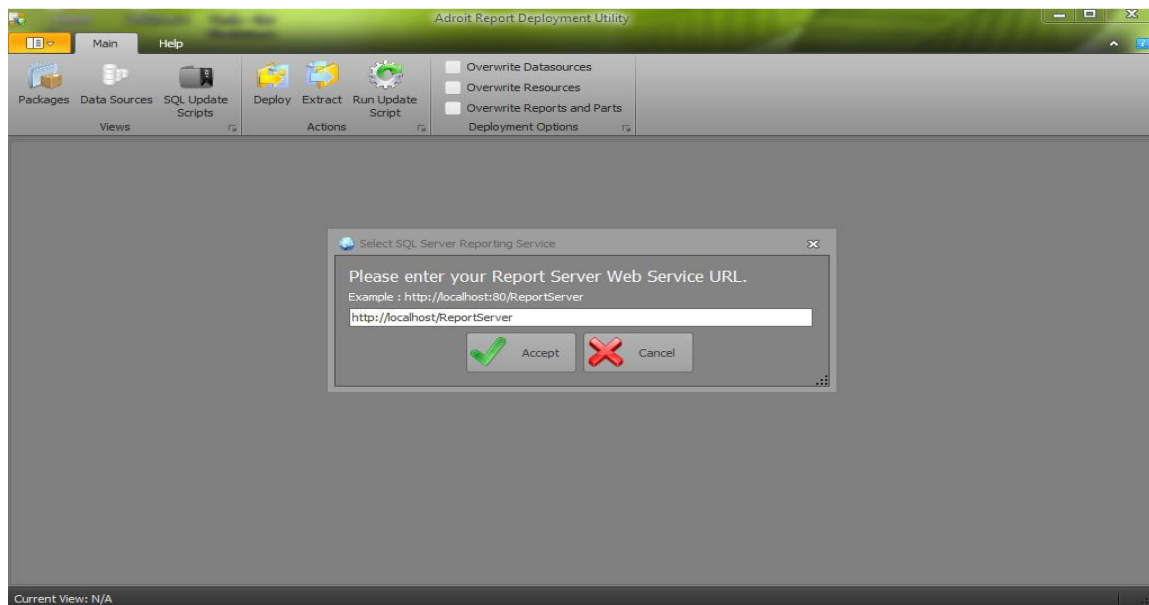
3. First time run

3.1. Connecting to reporting Services

When running the Adroit Report Deployment Utility, you will be required to provide the utility with the web address of the SQL Server Reporting Services' web service. For more information on finding your SSRS URL, go to the section on *Finding Your SQL Server Reporting Services URL*.

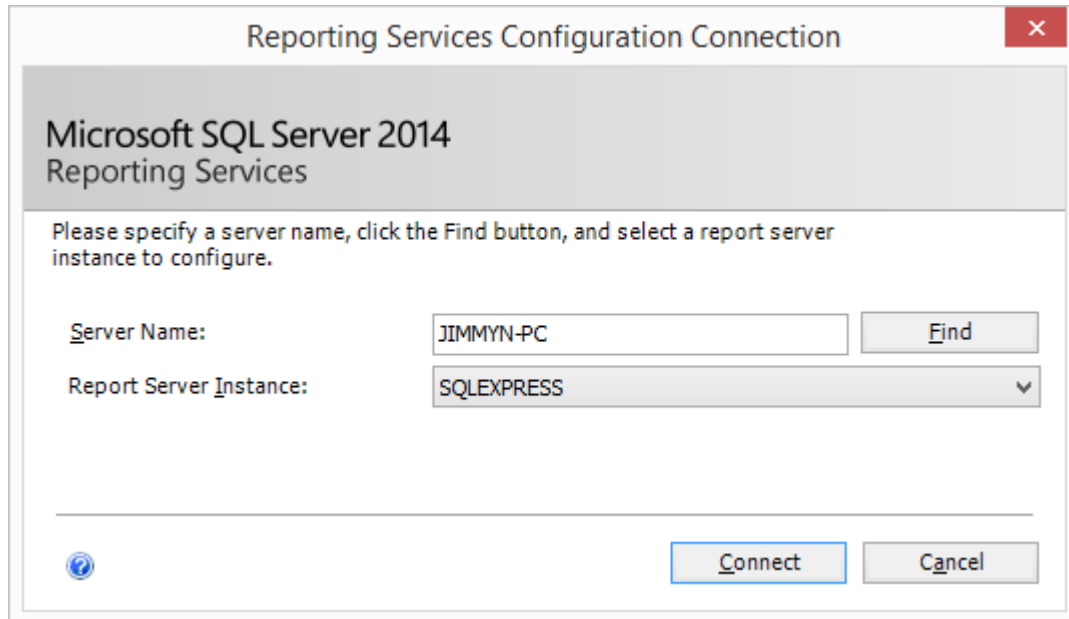
3.2. Examples

- `http://localhost/Reportserver`
- `http://localhost:80/Reportserver`
- `http://machinename/Reportserver`
- `http://machinename/Reportserver_instance`, etc.



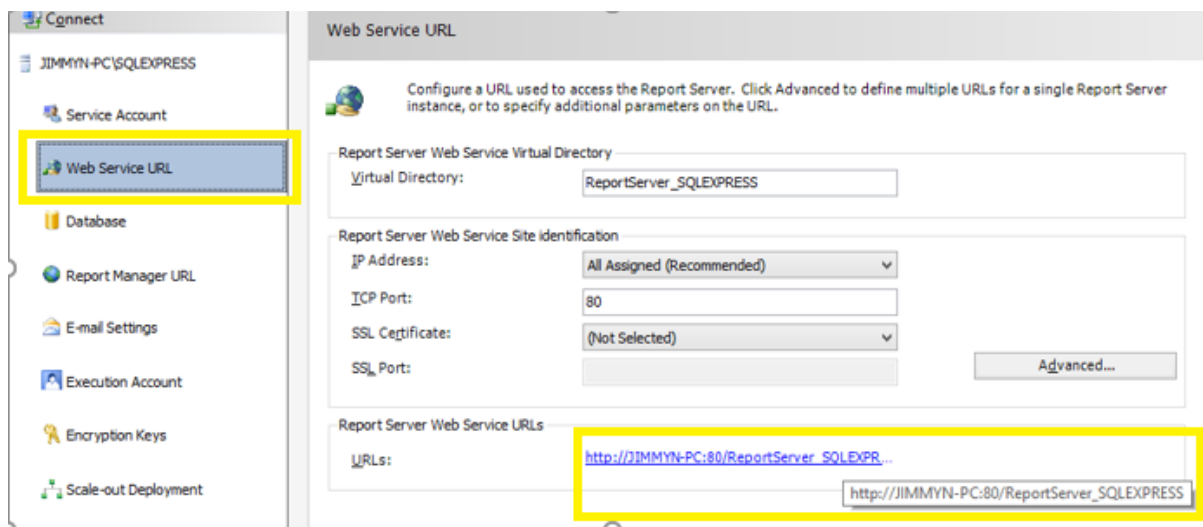
3.3. Finding your SQL Server Reporting Services URL

To find your SQL Server Reporting Services URL you will need to launch the *Reporting Services Configuration Manager* found in the Microsoft SQL Server 2014 Menu under Configuration Tools. Select your Server and Instance, then click "Connect".



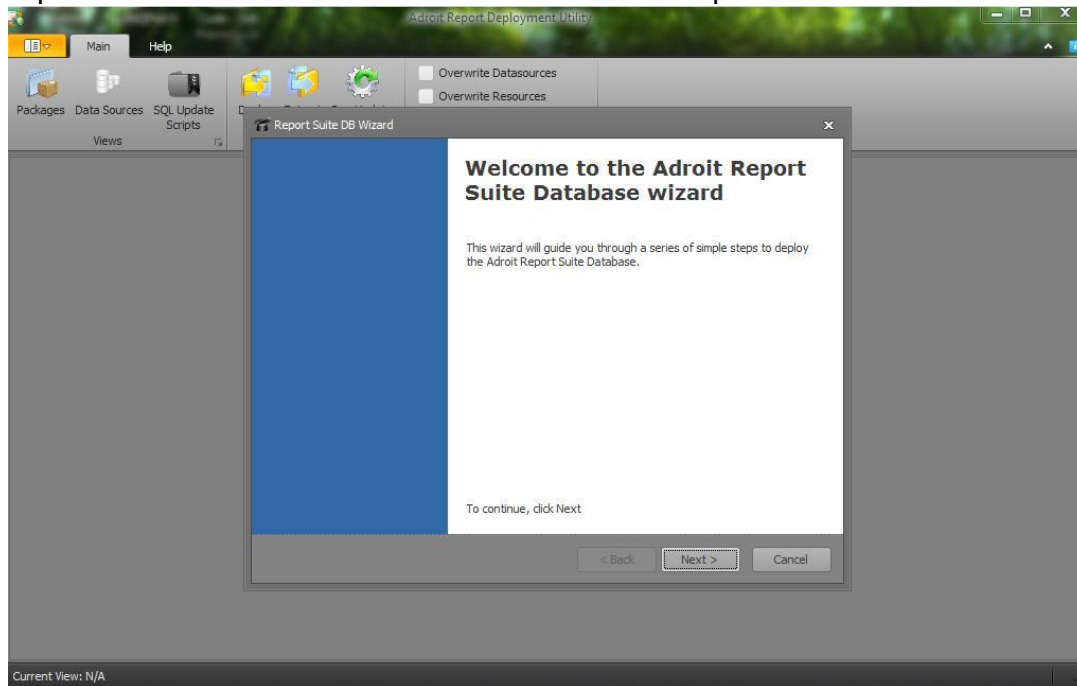
Now select "Web Service URL" on the left and you will see the URL on the right towards the end of the page.

Example: http://USER-PC:80/ReportServer_SQLEXPRESS



3.4. Report Suite Database Wizard

If you are running the Adroit Report Deployment Utility for the first time, you will be required to complete the Report Suite DB Wizard which will create the Adroit Report Suite database with the demo data.



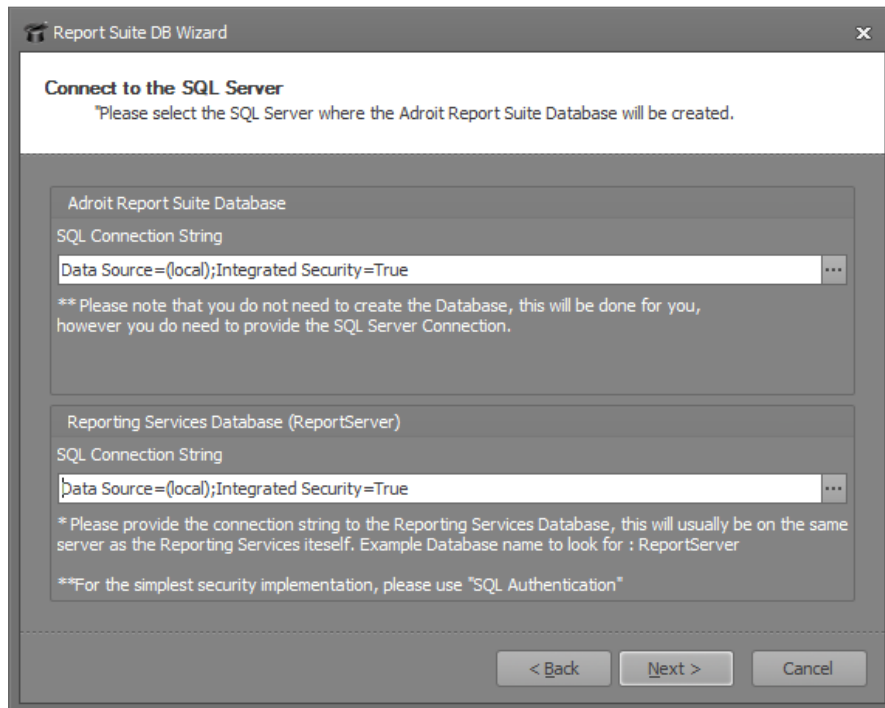
The Report Suite DB Wizard can be run at any time to change the SQL connection properties.

3.5. Setting SQL Server Connections

The Adroit Report Suite requires two database connections, namely the Report Suite Database and the Report Server Database. The Report Suite Database is used to store the demo data and report versions. SQL Server Reporting Services uses a SQL Server database to store all relevant catalogues or report information.

The Adroit Report Suite reads from this catalogue in order to manage the report list. By default this database "ReportServer" is created on the default instance of the SQL server.

The Report Suite DB Wizard is used to set SQL connection strings to both of these databases.



Report Suite DB Wizard

Connect to the SQL Server
Please select the SQL Server where the Adroit Report Suite Database will be created.

Adroit Report Suite Database

SQL Connection String
Data Source=(local);Integrated Security=True

** Please note that you do not need to create the Database, this will be done for you, however you do need to provide the SQL Server Connection.

Reporting Services Database (ReportServer)

SQL Connection String
Data Source=(local);Integrated Security=True

* Please provide the connection string to the Reporting Services Database, this will usually be on the same server as the Reporting Services itself. Example Database name to look for : ReportServer

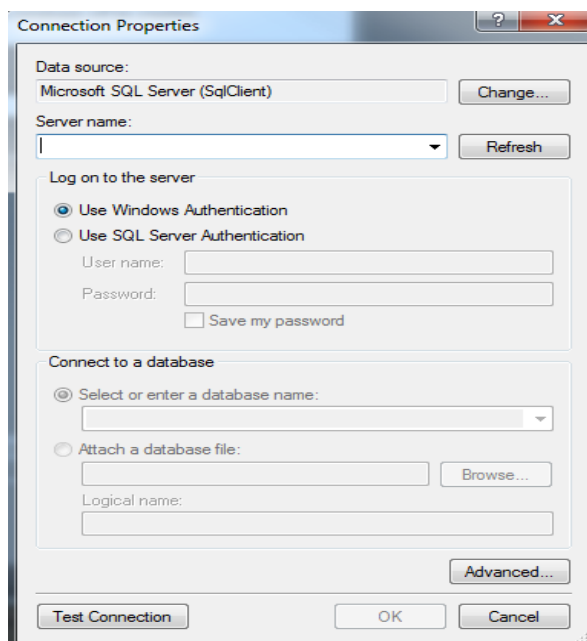
**For the simplest security implementation, please use "SQL Authentication"

< Back Next > Cancel

IMPORTANT:

You do not need to create or select an existing database; the Adroit Report Suite Database will be created for you.

Simply enter the server name and security details and test the connection. Reporting Services Database – enter the server name, security details and select the ReportServer database.



Connection Properties

Data source:
Microsoft SQL Server (SqlClient) Change...

Server name:
 Refresh

Log on to the server

☒ Use Windows Authentication

☐ Use SQL Server Authentication

User name: Password: ☐ Save my password

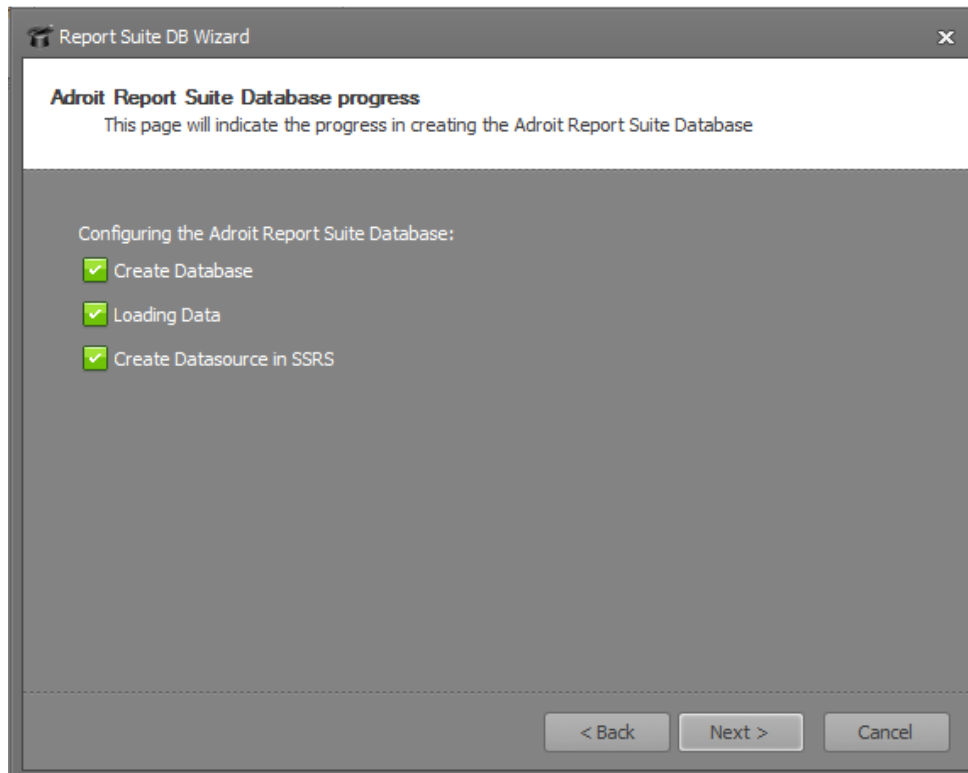
Connect to a database

☒ Select or enter a database name:

☐ Attach a database file:
 Browse... Logical name:

Advanced...

Test Connection OK Cancel

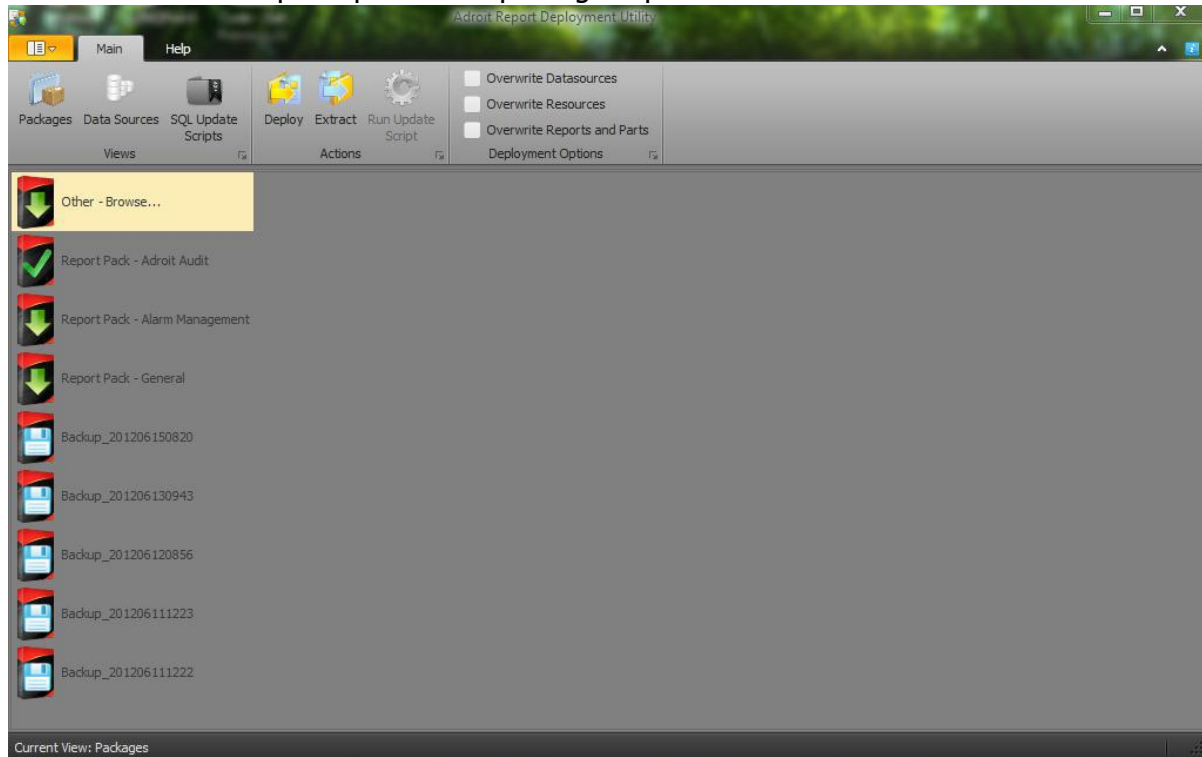


4. Basic Navigation

4.1. Deployment Utility Main Screen

Once you have successfully connected to the SQL Server Reporting Services' web service, you will be taken to the Packages view. Here you will see which report packs have been installed on your local machine, or you can browse to an alternate storage location for other report packs.

If you have opted for the "Backup" feature during the deployment of a report pack, you will also be shown the 5 latest backups as part of the packages options.



Report Pack Installed, but not deployed



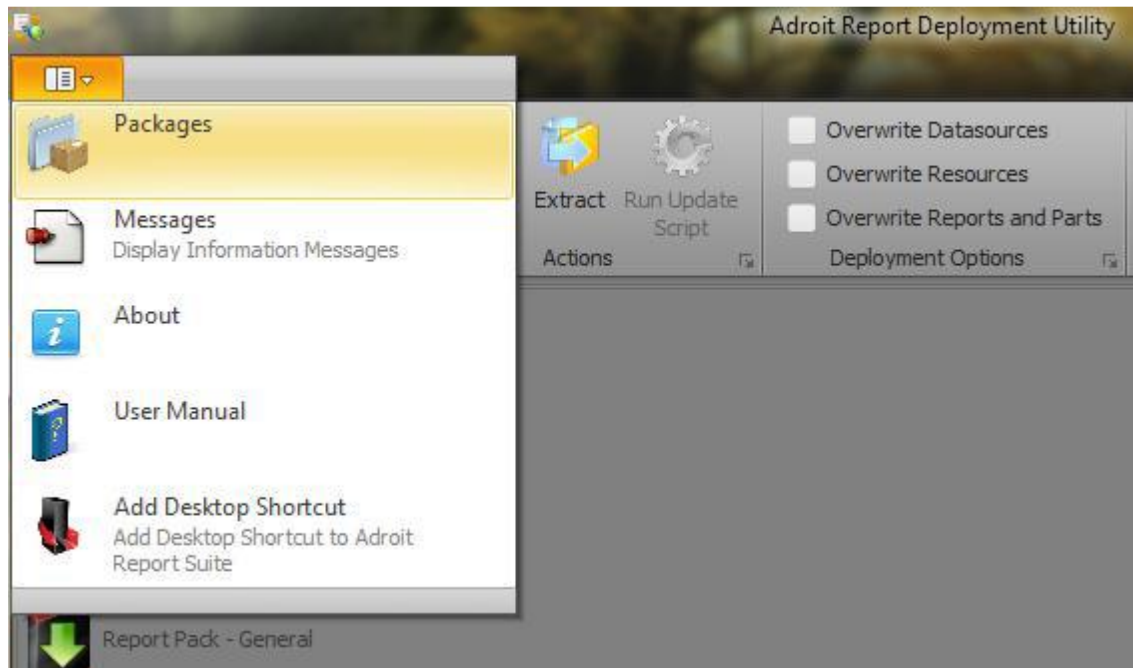
Report Pack Deployed



Backup Pack

4.2. Application Menu

Some of the Adroit Report Deployment Utility options can be accessed from the Application's dropdown menu.

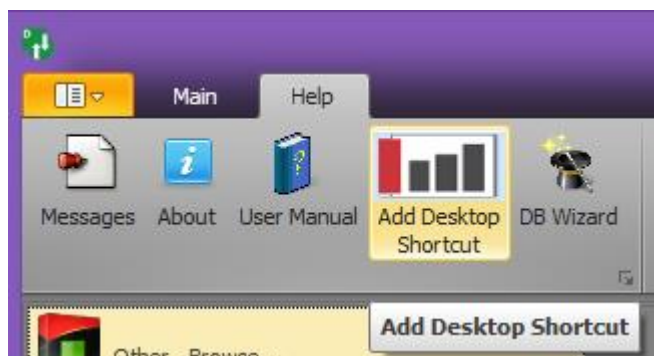


4.3. Add Desktop Shortcut



You can add a desktop shortcut of the Adroit Report Suite Switchboard from within the Adroit Report Deployment Utility.

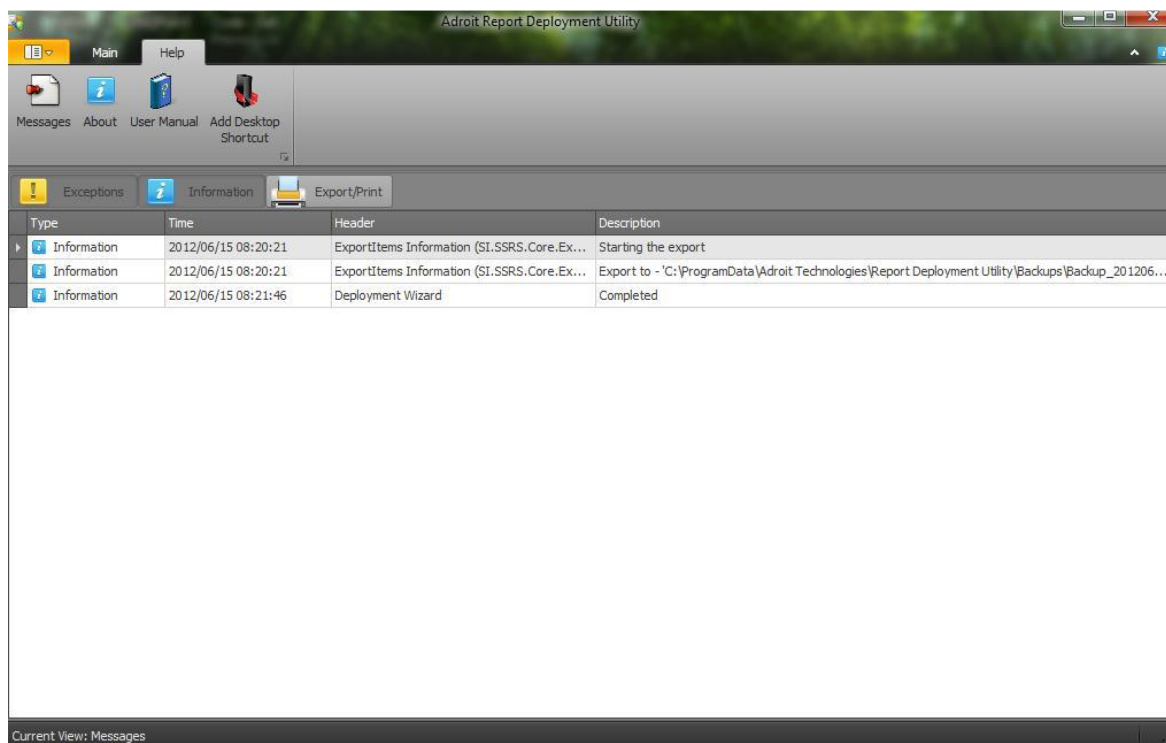
Go to the Help ribbon and click on the "Add Desktop Shortcut" button.



4.4. Information and Help Messages

All the messages generated in the current session of Adroit Report Deployment Utility can be viewed by clicking on the "Messages" button under the help section on the ribbon menu.

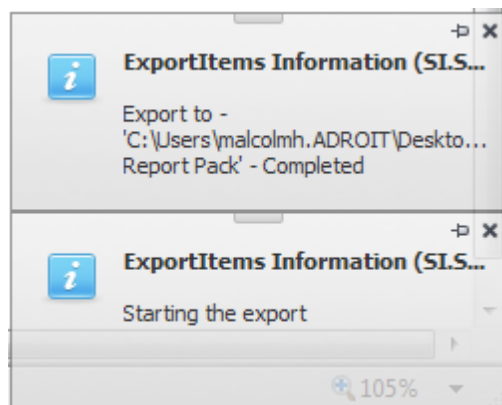
You will be able to print or export the messages to pdf, csv, text and other formats by clicking the "Export/Print" button.



4.5. Message Alert Windows

As information or error messages are generated during the session, you will see these alert messages "pop-up" on the bottom right-hand side of the screen.

The alerts appear for a predetermined duration and will then disappear, although the messages are viewable in the Help window (refer to the section Information & Help Messages above).

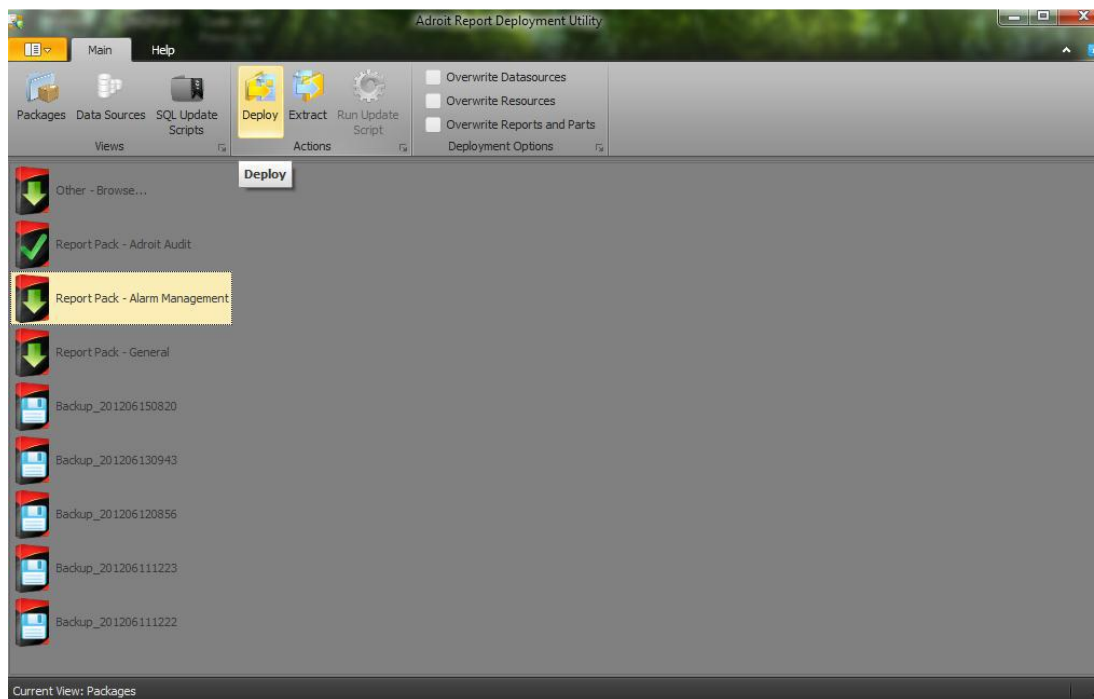


5. Deploying a Report Pack

To deploy a report pack, you select the pack/s that you would like to deploy then click on the “Deploy” button. You will be presented with the Report Pack Deployment Wizard that will guide you through the deployment steps.

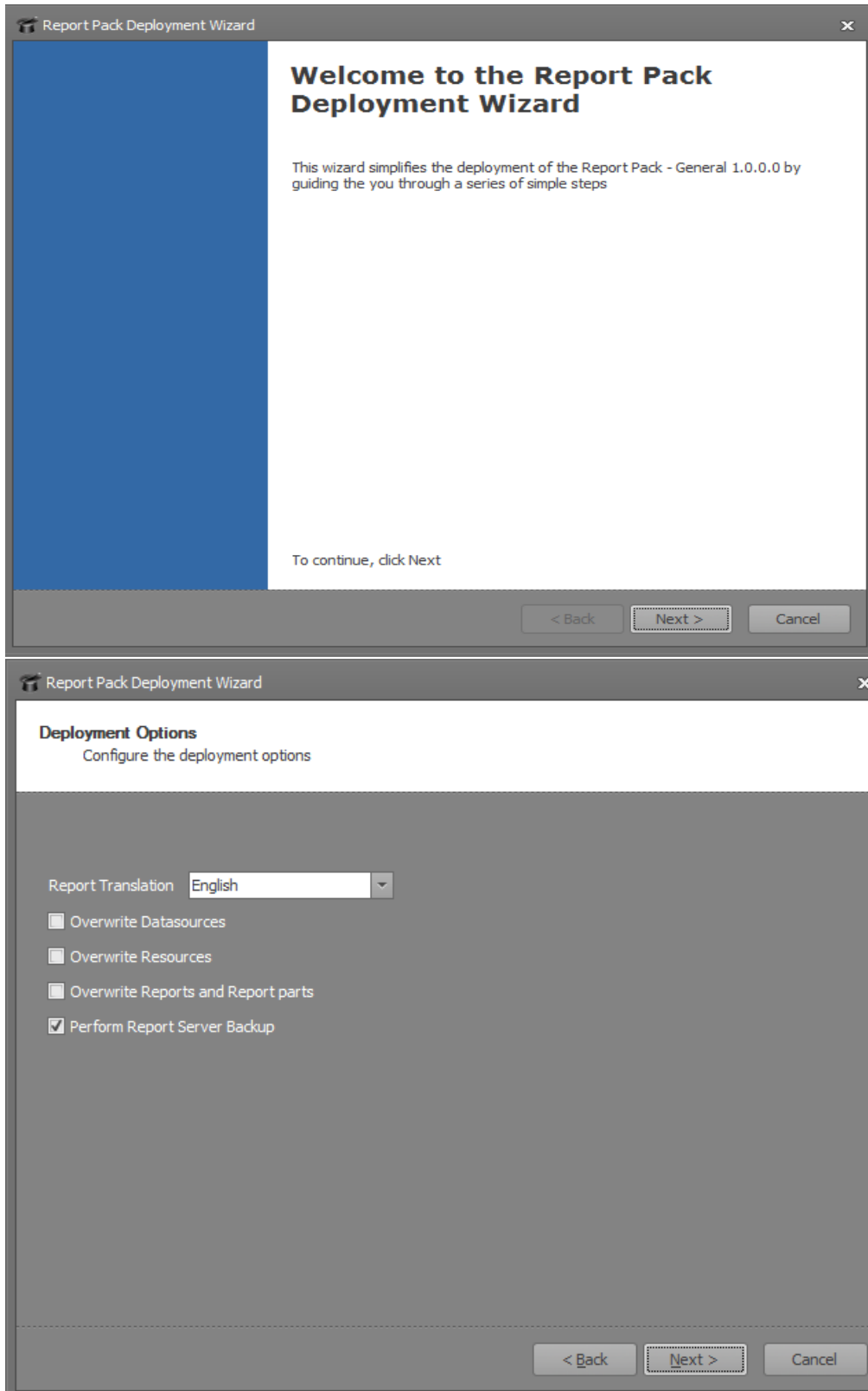
5.1. Why Deploy my Report Packs?

When a report pack is installed it is basically copied into the Adroit Program Files. Before a report can be viewed, the report pack must be deployed to the SQL Reporting Services server.



5.2. Report Pack Deployment Wizard

The Deployment Wizard gives options to perform a full backup of the Reporting Services as a report pack. If the pack is being deployed to an existing system, one can choose to overwrite existing components.

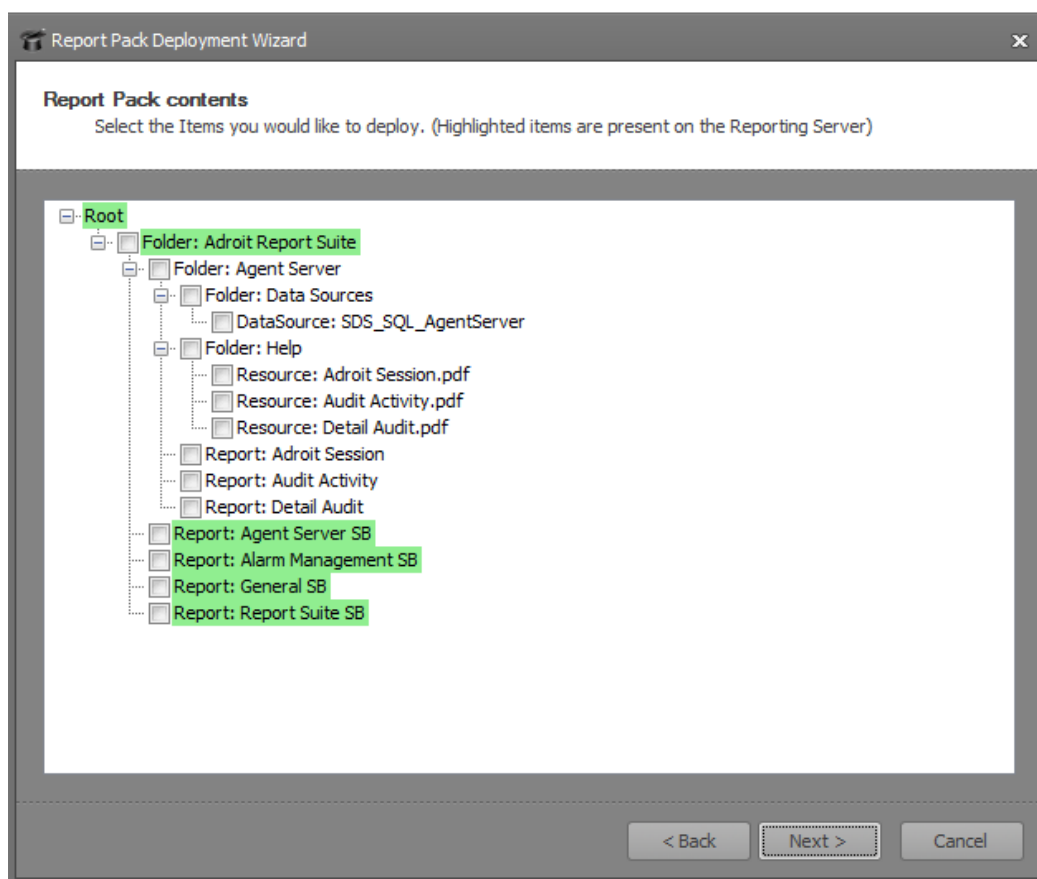


The report translation option let you specify a language preference to which the reports will be translated during deployment

When deploying a report pack, it is generally recommended that you deploy or re-deploy all the objects even if they are already present (highlighted in green), on your Reporting Services Server.

Remember to select "Overwrite Reports & Report Parts" option on the previous page if you would like to overwrite a previously installed component. This will ensure that you have the latest updates contained in the report pack.

All objects can be selected by checking the highest level check box. For example: Folder: Adroit Report Suite.

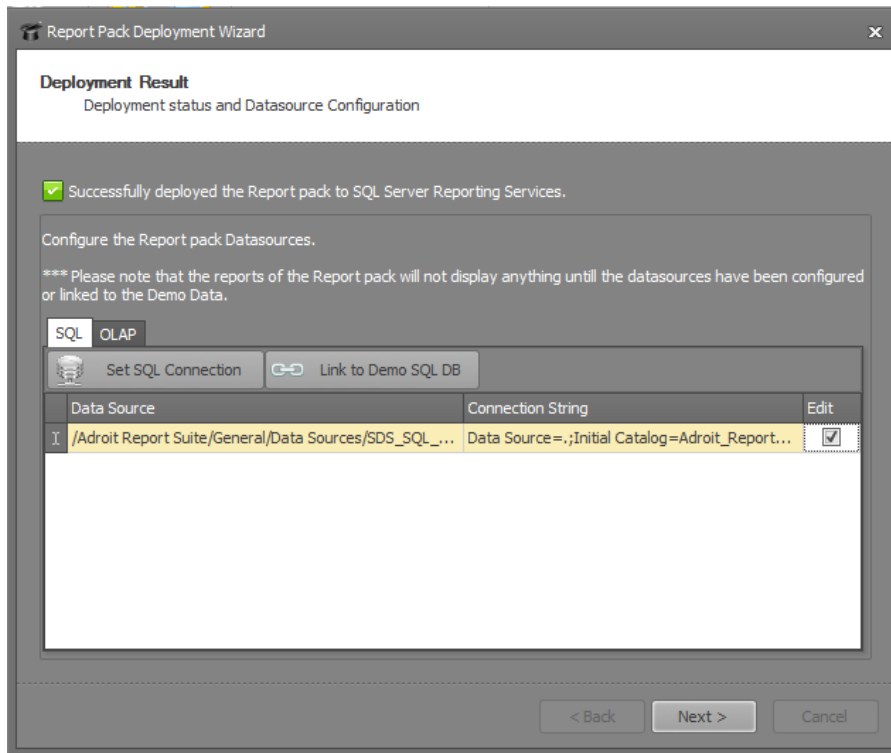


At this point in the Deployment Wizard, you will need to either link the data source to your existing database or link it to the demo data created by the Adroit Report Deployment Utility.

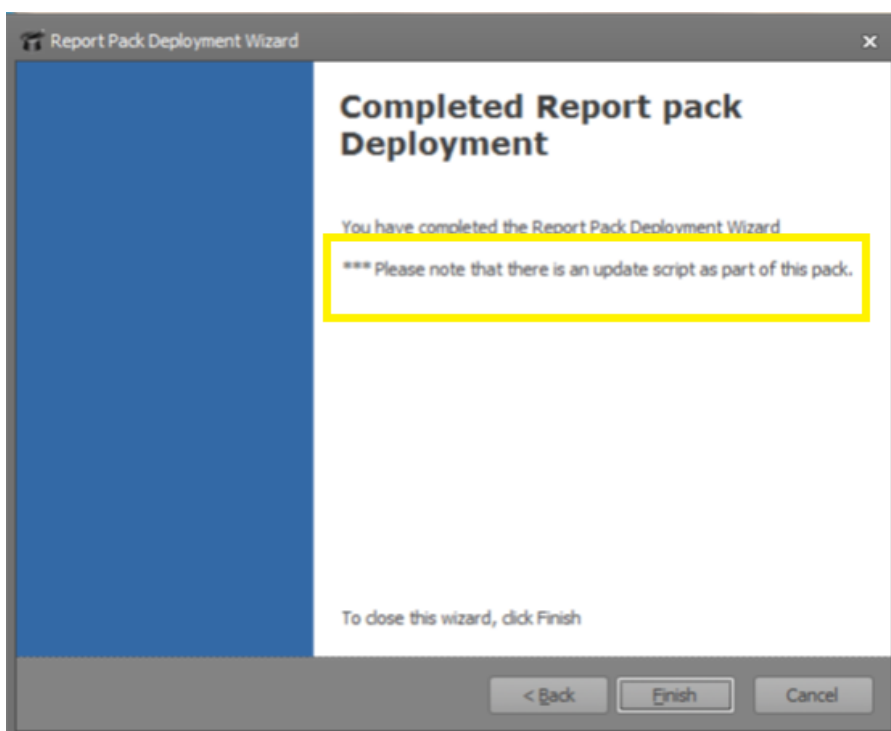
To edit the data source, check the "Edit" checkbox and then choose to either "Link to Demo DQL DB" or "Set SQL Connection".

If you do not set the data source at this time, the deployed reports might not work correctly as the default data source points to the demo data presumed to be on the local server

The data source connection can be modified at any point through the deployment utility.



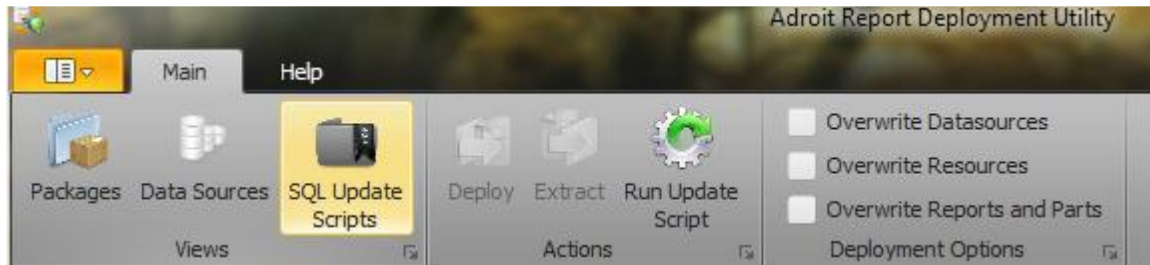
Please note that you may be required to update the database you are connecting to in order for your deployed reports to function correctly. There will be a notification at the final screen indicating whether there is an updated script as part of the report pack.



Refer to the *Running SQL Update Scripts* section to run the update scripts for a deployed report pack when required.

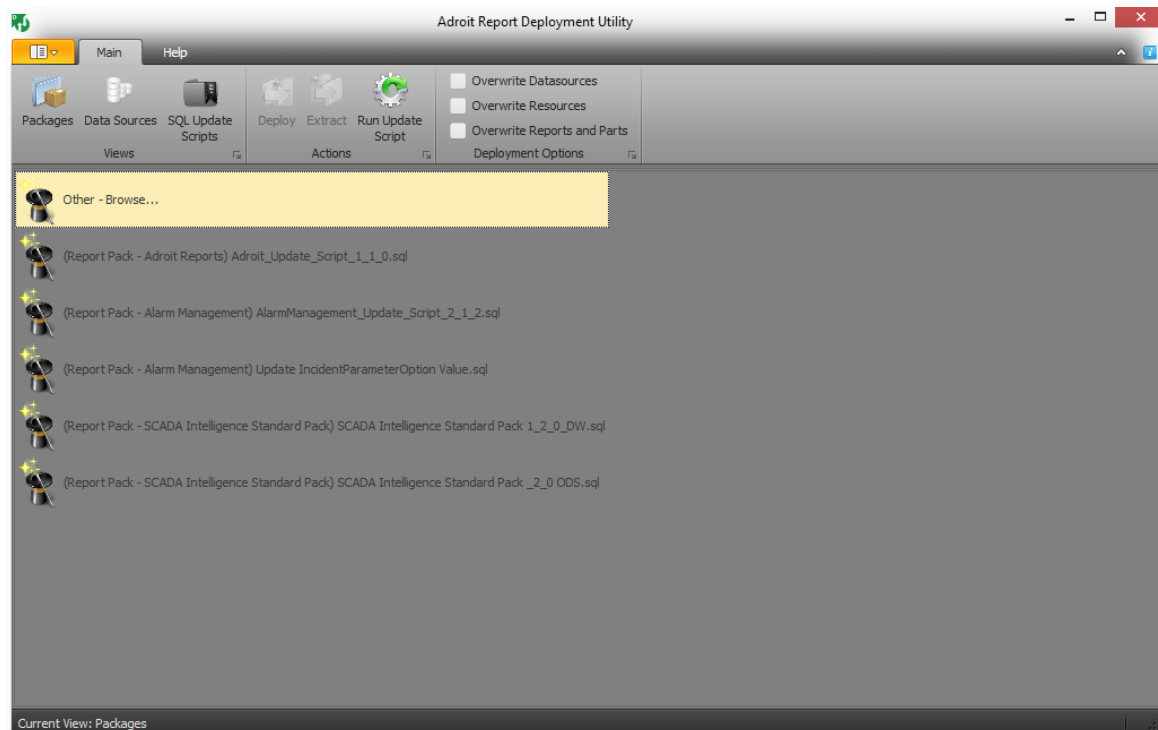
5.3. Running SQL Update Scripts

Some report packs will require you to run some updates on your data source (the database with the data). The Adroit Report Deployment Utility allows you to run/execute these scripts from within the utility itself. By clicking on the "SQL Update Scripts" button, you will see the available update scripts as installed with each report pack.



Once you have selected an update script in the list (or browse to your own SQL script) you can then click on the "Run Update Script" button. This will launch the SQL Connection wizard, where you then connect to the SQL Server and then the database. The script will then be executed on the destination you have selected.

Now your database will be updated to the required revision in order for the reports in the report pack to function correctly.



6. Managing Data Sources

To view the deployed data sources on Reporting Services, you can click on the "Data Sources" button. You will be able to view all SQL and OLAP data sources available on the SQL Report Server.

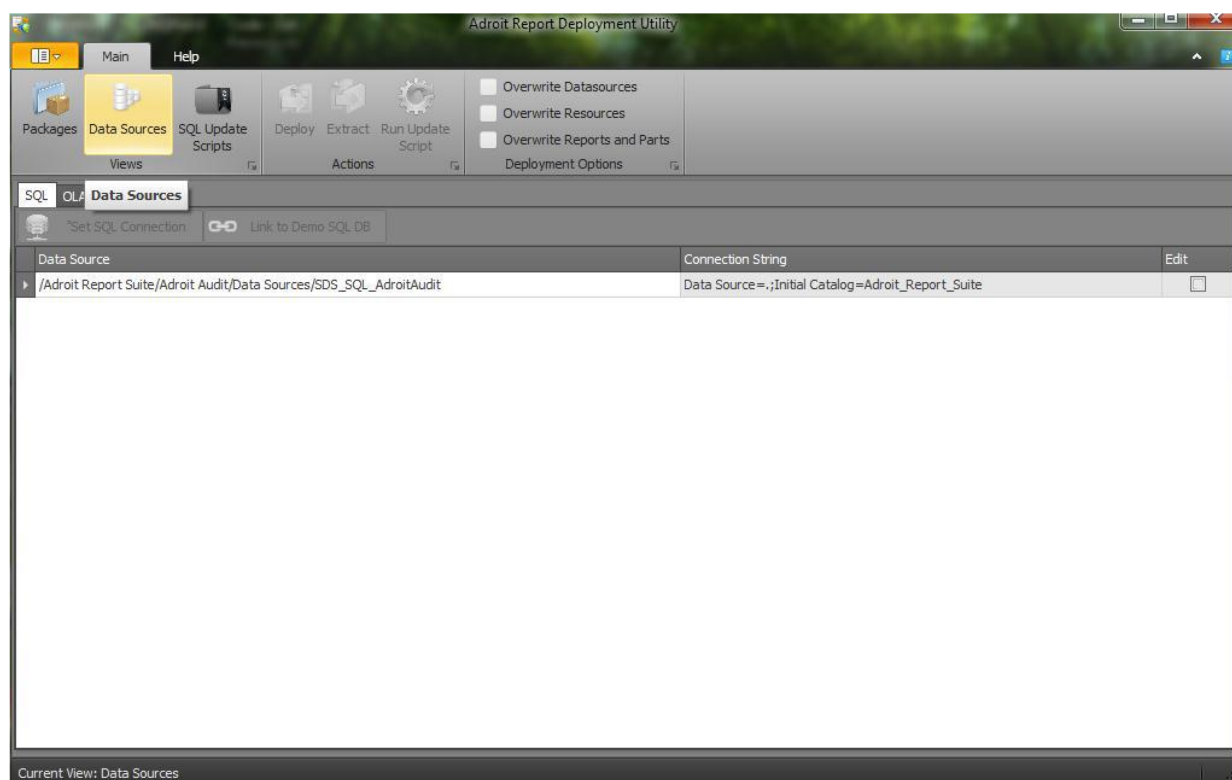
Any data source connection strings can be modified in the Adroit Report Deployment Utility. Simply check the "Edit" column of the data source you would like to change and then click the "Set SQL/Cube Connection" button and complete the Connection Properties dialogue.

Alternatively you could link it to the demo data in the Adroit Report Suite database (created at first run) by clicking on the "Link to Demo SQL DB" button.

The data sources are identified by their location in reporting Services.

Example: //Adroit report Suite/General/Data Sources/SDS_SQL_General.

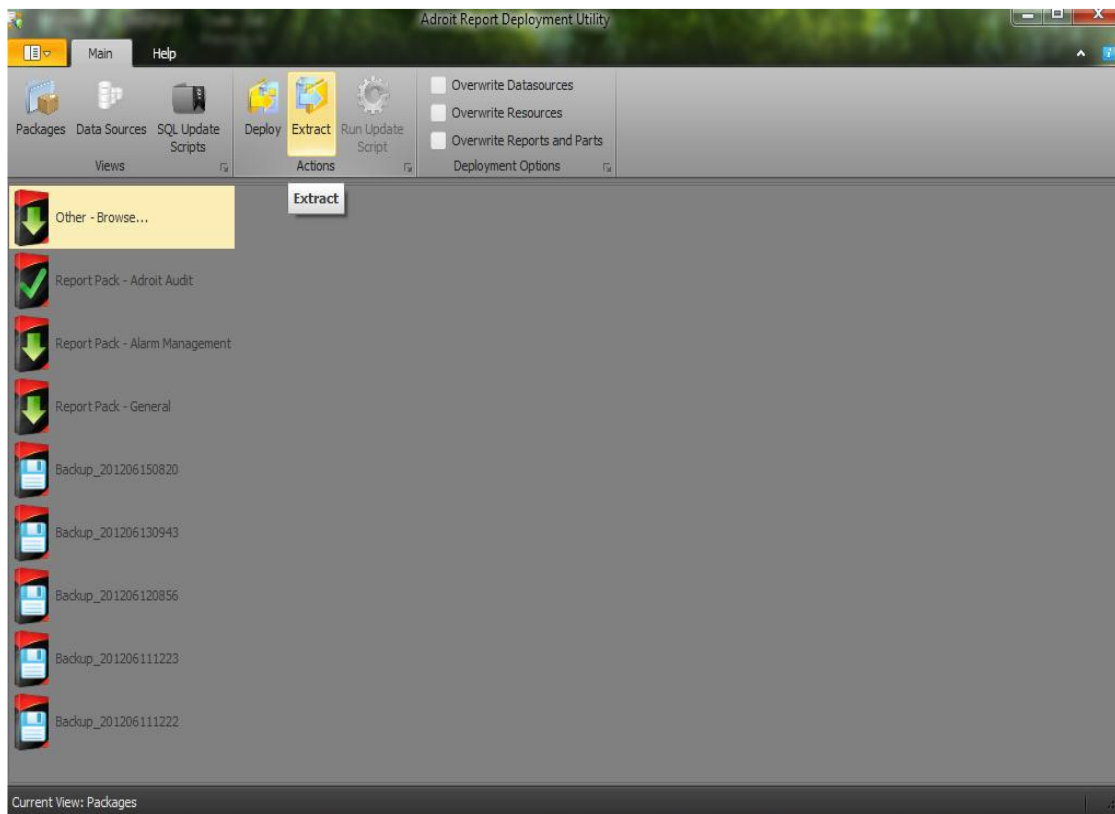
All Report Suite data sources can all be found within the Report Suite folder. Each report pack has a folder within the Report Suite folder.



7. Extracting Reports

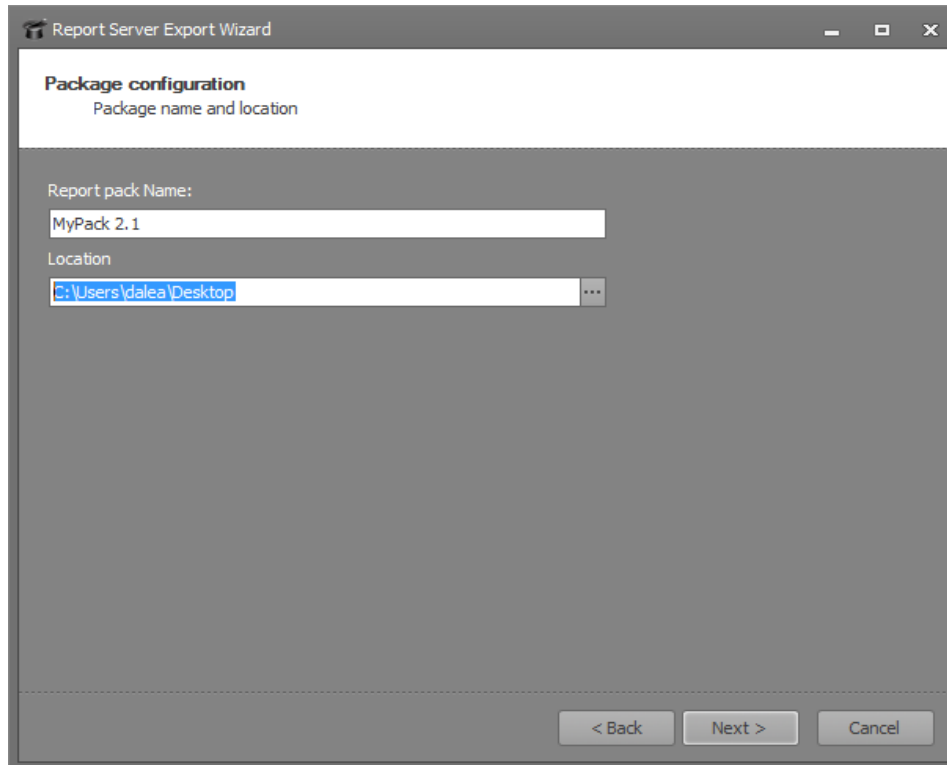
The Adroit Report Deployment Utility enables you to create your own ad-hoc “Report Packs”. This functionality allows you to extract reports from one server and importing them onto another, or just make backups of your current report configurations.

To create your own report pack, simply click the “Extract” button, this will present you with a wizard (Report Server Export Wizard) to guide you through the steps of creating your own report pack. Refer to *Report Server Export Wizard* section.

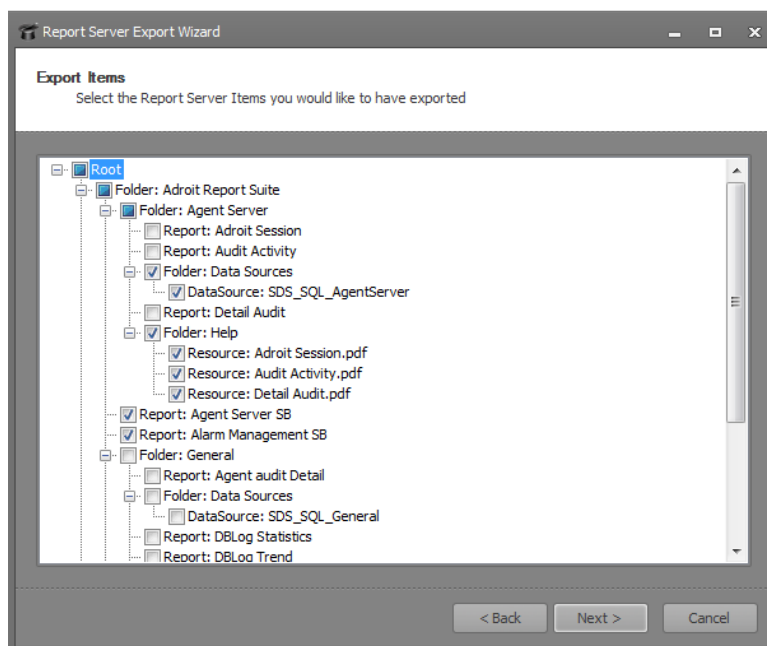


7.1. Report Server Export Wizard

The Export Wizard makes it possible to extract any components from any SQL Report Server the Deployment Utility is connected to, into a user defined report pack. The report pack can in turn be deployed to another SQL Report Server using the Report Deployment Utility.



Use the Export Wizard to give the report pack a name and choose the storage location.



Select the components you would like to export to the report pack and click on "Next" to create the report pack.

8. Upgrades and Database Updates

From time to time the Adroit Report Suite might require database changes to facilitate new features or new report packs. This can easily be managed through the DB Wizard option available under the Help menu tab.

You would be required to specify the Adroit Report Suite database to upgrade or create. Refer to the ***SQL SERVER CONNECTION – REPORT SUITE DB WIZARD***

9. Technical Support

For further support, contact our Technical Support Desk on 011-658-8100 or email support@adroit.co.za.

You can also visit our website, follow us on Twitter, find us on Facebook or connect with us on LinkedIn.

