Aras Innovator 2023 Release

Microsoft Reporting Services Guide

For use with Microsoft SQL Server 2019

Document #: D-008118

Last Modified: 12/8/2022

Copyright Information

Copyright © 2022 Aras Corporation. All Rights Reserved.

Aras Corporation 100 Brickstone Square Suite 100 Andover, MA 01810

Phone: 978-806-9400 **Fax:** 978-794-9826

E-mail: Support@aras.com

Website: https://www.aras.com

Notice of Rights

Copyright © 2022 by Aras Corporation. This material may be distributed only subject to the terms and conditions set forth in the Open Publication License, V1.0 or later (the latest version is presently available at http://www.opencontent.org/openpub/).

Distribution of substantively modified versions of this document is prohibited without the explicit permission of the copyright holder.

Distribution of the work or derivative of the work in any standard (paper) book form for commercial purposes is prohibited unless prior permission is obtained from the copyright holder.

Aras Innovator, Aras, and the Aras Corp "A" logo are registered trademarks of Aras Corporation in the United States and other countries.

All other trademarks referenced herein are the property of their respective owners.

Notice of Liability

The information contained in this document is distributed on an "As Is" basis, without warranty of any kind, express or implied, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose or a warranty of non-infringement. Aras shall have no liability to any person or entity with respect to any loss or damage caused or alleged to be caused directly or indirectly by the information contained in this document or by the software or hardware products described herein.



Table of Contents

36	ina U	S TOUR	Comments	C	
Do	cum	ent Co	nventions	6	
1	Intro	ductio	on	7	
2	Installing Reporting Services				
_	2.1	Installation is a component of SQL Server 2019			
	2.1				
		2.1.1 2.1.2	Default Instance Service account Setup		
		2.1.2	Database Engine Configuration and Authentication Mode		
		2.1.4	Analysis Services Configuration		
		2.1.5	Reporting Services Options		
		2.1.6	Remaining Selections	18	
3	Configuring Reporting Services				
	3.1	Installing Reporting Services		19	
	3.2	Setting	Up the Report Folder	22	
	3.3	_	a Shared Data Source		
	3.4	Adding	Reporting Services User and Role	24	
		3.4.1	Add User Account for Reporting		
		3.4.2	Add the Reporting Role	25	
4	Usir	ng Visu	al Studio for Report Design	30	
	4.1	Create a New Report Project Configure Project Properties			
	4.2				
	4.3	Add Ne	w Shared Data Source		
		4.3.1	Connection Properties		
		4.3.2	Deploy the Shared Data Source		
5	Creating your First Report				
	5.1		New Report using the Wizard		
	5.2	Select the Data Source			
	5.3 5.4	Design the Query Select the Report Type Design the Table Choose the Table Style Name the Report Wizard Report Results Visual Studio Layout Deploying the Report			
	5.4 5.5				
	5.6				
	5.7				
	5.8				
	5.9				
	5.10 5.11				
	5.11	Confirm Deployment Running the Report from within Aras Innovator			
	J	5.12.1	Adding Aras Innovator Report Item		
		0.12.1	המעוווא הופט ווווטיפוטו הפוטוג וופווו	4	



0	Date	a Ralate	ed SQL Queries	54
	7.4	Select t	the Shared Data Source	52
	7.3	Import t	the RDL	50
	7.2	Export :	the RDL	49
	7.1		ng the Report Manager page	
7	Report Manager			
	6.5	Report	Name	47
	6.4		s Folder	
	6.3			
	6.2		t Parameter	
	6.1		Parameters	
6	Report Server query_string Parameters			
_	D		·	
		5.12.2	Passing Named Parameters to the ReportServer	44



Send Us Your Comments

Aras Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for future revisions.

- o Did you find any errors?
- o Is the information clearly presented?
- o Do you need more information? If so, where and what level of detail?
- o Are the examples correct? Do you need more examples?
- o What features did you like most?

If you find any errors or have any other suggestions for improvement, indicate the document title, and the chapter, section, and page number (if available).

You can send comments to us in the following ways:

Email:

TechDocs@aras.com

Subject: Aras Product Documentation

Or,

Postal service:

Aras Corporation 100 Brickstone Square Suite 100 Andover, MA 01810 Attention: Aras Technical Documentation

If you would like a reply, provide your name, email address, address, and telephone number.

If you have usage issues with the software, visit https://www.aras.com/support/



Document Conventions

The following table highlights the document conventions used in the document:

Convention	Description	
Bold	This shows the names of menu items, dialog boxes, dialog box elements, and commands. Example: Click OK .	
Code	Code examples appear in courier text. It may represent text you type or data you read.	
Yellow highlight	Code with yellow highlight is used to draw attention to the code that is being indicated in the content.	
Yellow highlight with red text	Red color text with yellow highlight is used to indicate the code parameter that needs to be changed or replaced.	
Italics	Reference to other documents.	
Note:	Notes contain additional useful information.	
Warning	Warning contains important information. Pay special attention to information highlighted this way.	
Successive menu choices	Successive menu choices may appear with a greater than sign (>) between the items that you will select consecutively.	
	Example: Navigate to File > Save > OK .	



1 Introduction

Aras Innovator's Report ItemType includes support for Microsoft's 'Reporting Services' in addition to supporting the existing XSLT based reports.

Reporting Services is an integral component of SQL Server 2019, and any customer with a SQL Server 2019 license can install Reporting Services. (See installation instructions below).

Usage of this release is recommended only for those with advanced Aras Innovator and SQL training.

Primary benefits to switching from stylesheet driven reports to Report Server:

- Query building is in SQL and is graphical (same as in Enterprise Manager).
- Report definitions are transportable, you can develop on your laptop, and then deploy to a production server.
- Report layout is more drag-n-drop and has more powerful formatting tools.
- The resulting reports are paginated.
- The end-user can easily print, PDF, or export to Excel the report output.
- Excel like Charts and graphs can be produced

To learn more about Microsoft Reporting Services visit: Microsoft SQL Server: Reporting.



2 Installing Reporting Services

Reporting Services is a component of Microsoft SQL server 2019. Click on this link to download Reporting Services separately: https://www.microsoft.com/en-us/download/details.aspx?id=100122. The Microsoft Download page appears.

Use the following procedure to download Microsoft SQL Server 2019 Reporting Services and install it:

1. Scroll down to Microsoft SQL Server 2019 Reporting Services.

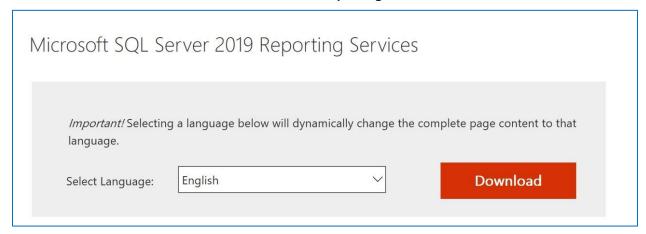


Figure 1.

2. Click **Download**. The dialog box shown in Figure 2 appears.

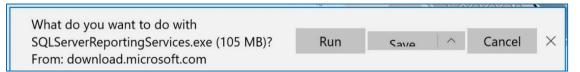


Figure 2.



3. Click **Run**. A security scan is run. When that is successfully completed The dialog box shown in Figure 3 appears.



Figure 3.

4. Click Install Reporting Services. The dialog box shown in Figure 4 appears.



Figure 4.

5. Select the **Enter the product key** button and type the product key in the appropriate field.



6. Click Next. The Review the license terms dialog appears.



Figure 5.

7. Select I accept the license terms and click Next. The Install Database Engine dialog appears.



Figure 6.



Microsoft SQL Server 2019 Reporting Services

Specify an install location

Install location

CAProgram Files\Microsoft SQL Server Reporting Services

Provious Install

8. Click Next. The Specify an install location dialog appears.

Figure 7.

- 9. Use the default location shown here or click Browse to select a different install location.
- 10. Click **Install**. When the set-up procedure is complete, the dialog box shown in Figure 8 appears.



Figure 8.

11. Click Configure report server. The Report Server Configuration Manager dialog appears.



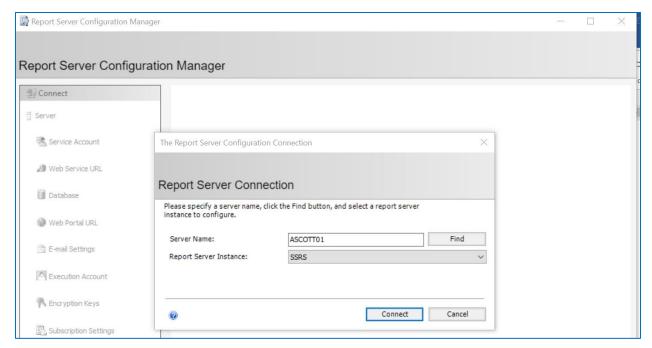


Figure 9.

- 12. Click Find to select a different server name.
- 13. Click the **down arrow** in the **Report Server Instance** field to select a different Report Server Instance.



Report Server Configuration Manager: ASCOTT01\SSRS Report Server Configuration Manager **3** Connect Report Server Status ASCOTT01\SSRS Use the Report Server Configuration Manager tool to define or modify settings for the report server and web portal. Before you can use the report server, you must configure the Web Service URL, the database, and the Web Portal Service Account Web Service URL Current Report Server Database SSRS Instance ID: Web Portal URL Edition: SOL Server Evaluation 15.0.1102.675 Product Version: a E-mail Settings Report Server Database Name: Report Server Mode: Execution Account Report Service Status: Stopped Rencryption Keys Subscription Settings Scale-out Deployment | | Power BI Service (cloud) 11:40:17.4121 | Stopping report server "SQLServerReportingServices" on ASCOTT01. The task completed successfully. Сору

14. Click Connect to connect to the appropriate server. The dialog box shown in Figure 10 appears.

Figure 10.

15. Click **Start**. You can modify or define settings for the Report Server. Click **Stop** to stop the Report Server.

In addition to selecting the Reporting Services option, you can select **Analysis Services** that provides graphing and charting functionality.

2.1 Installation is a component of SQL Server 2019

This section is a summary of dialogs for installing SQL server 2019.

Note: If you view dialog boxes not listed here, use the default selections.



2.1.1 Default Instance

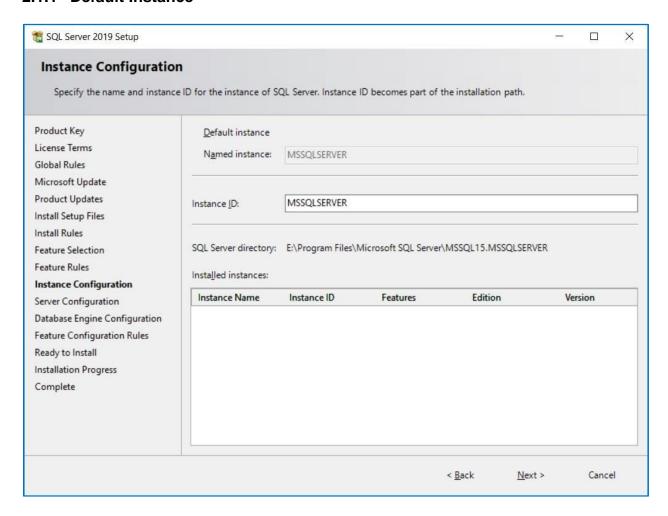


Figure 11.



2.1.2 Service account Setup

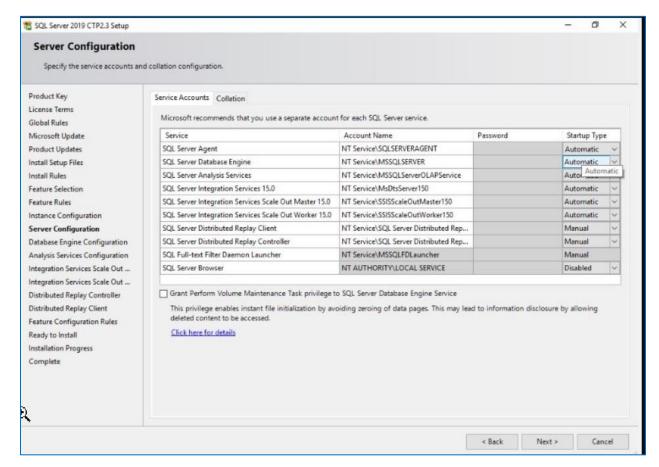


Figure 12.



2.1.3 Database Engine Configuration and Authentication Mode

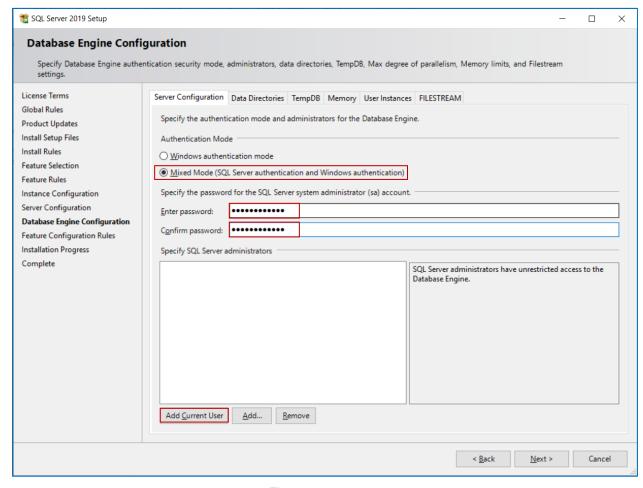


Figure 13.



2.1.4 Analysis Services Configuration

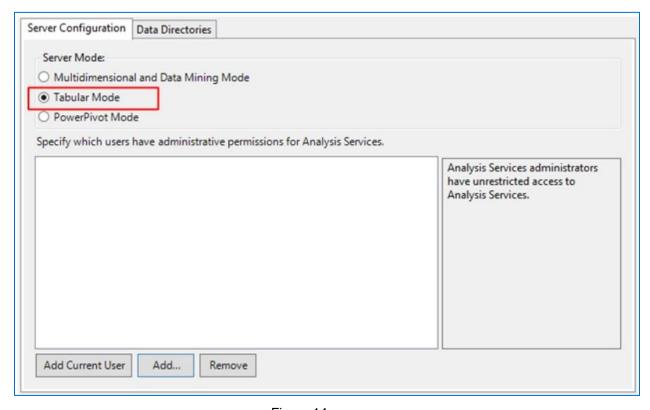


Figure 14.



2.1.5 Reporting Services Options

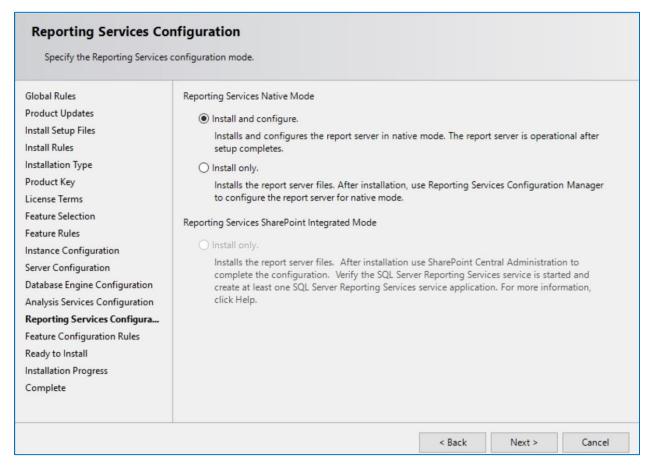


Figure 15.

2.1.6 Remaining Selections

The default selections can be used from this point forward.



3 Configuring Reporting Services

The Reporting Services use Folders to organize Reports. The Aras Innovator integration with Reporting Services use as the default **Innovator Reports** Folder.

In this section, we configure the Reporting Services using the Report Manager by adding the **Innovator Reports** Folder and a Shared Data Source, which the Reports use to connect to the database.

3.1 Installing Reporting Services

The **ReportServer** Reporting Services comes with the **Report Manager** page used to configure the Reports, Folders, Data Sources, and so on. This page has been integrated into Innovator client via an Innovator Report that opens the **Report Manager** page.

Open your browser with http://localhost:80/Reports on the default installation.

To set up Reporting Services:

- 1. Open the Reporting Services Configuration Manager.
- 2. Set up a Service Account.

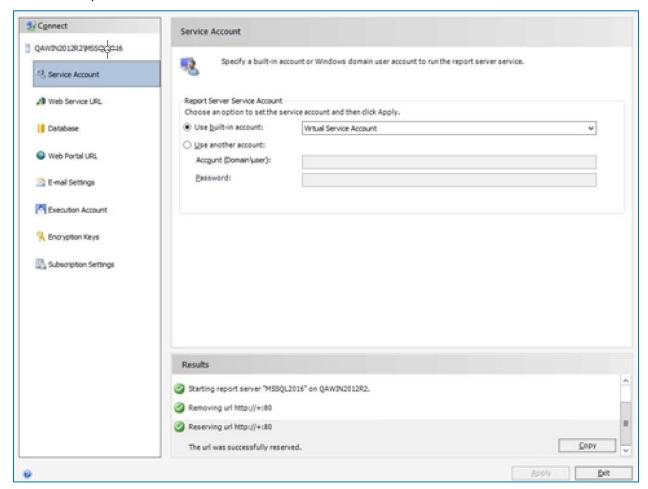


Figure 16.



3. Set up a Web Service URL

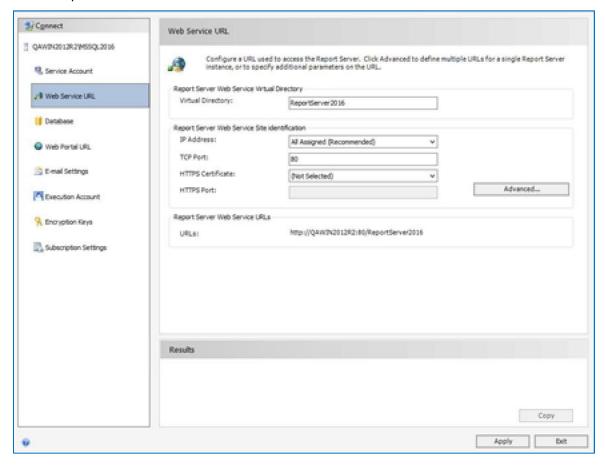


Figure 17.



4. Set up the Database.

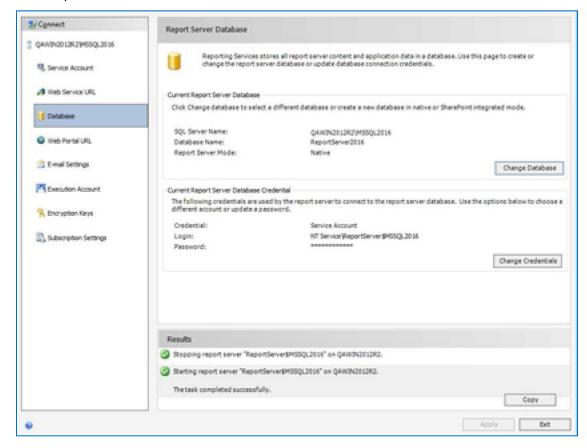


Figure 18.





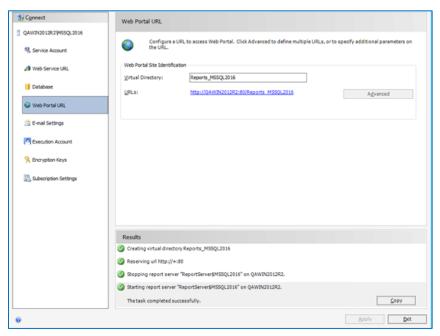


Figure 19.

3.2 Setting Up the Report Folder

1. Open the **Report Manager** page (defined above) in a new dialog.

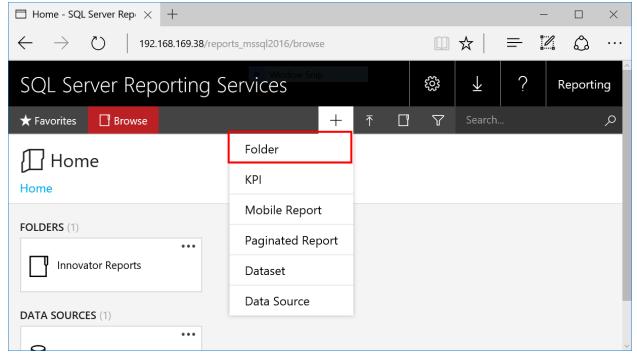


Figure 20.

2. Click + and then Folder.



3. Enter Innovator Reports for the name and click Create.

Figure 21.

Note: If you use a folder named something other than Innovator Reports, you need to change the Report Server Folder variable in the database as well in TOC --> Administration --> Variables. The default value for this is Innovator Reports, but it can be customized for each database. For the purposes of these instructions, we assume the default value is used.

3.3 Adding a Shared Data Source

Once you add the **Innovator Reports** Folder, navigate into it by clicking on the link. Now, you add a Shared Data Source for the Reports to use to connect to the database.

1. Click + and then **Data Source** inside the **Innovator Reports** folder.

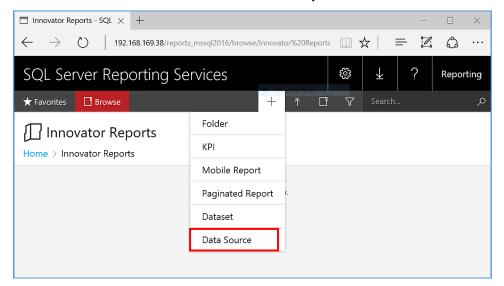
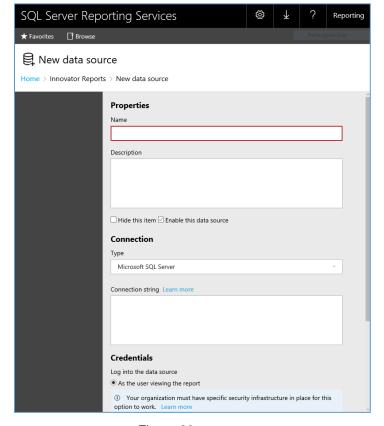


Figure 22.





The **New data source** dialog appears.

Figure 23.

2. Enter innovator_regular for the Data Source Name.

Note: By using this same name for both the development and production servers, exporting and importing Reports becomes simpler because there is no need to reassign the Data Source for the Reports you import.

3. Enter the following for the Connection String replacing the values for the two parameters with the actual server name where SQL Server is installed as well as the actual database name.

```
data source=<SQLServerName>;initial catalog=<InnovatorDatabase>
e.g.
data source=MyServer\MSSQLSERVER2019;initial catalog=InnovatorSolutions
```

- 4. Select the **Using the following credential** choice for the **Connect Using** field and enter the **DB Client Login** credentials for your database.
- 5. Click Create to deploy the shared Data Source.

3.4 Adding Reporting Services User and Role

The entry point for the Microsoft Reporting Services is the ReportServer.asmx file. The same Web Service is used to request Reports and administer the Report Server.

The Web Service is configured by default to use Windows Authentication. You can't simply open the security for anonymous Web users because that would open the Report Manager as well.



This security model requires the User be authenticated when they request Reports. A dialog opens requesting the user's login credentials the first time they request a Report each time the browser is opened again. When requesting the Report from within Aras Innovator this would not be desirable. Users would not only have to constantly provide login credentials to access reports, but each Innovator user would also have to have either a domain or local user access on the server.

To handle this problem, Aras provides the Innovator Reporting Services Gateway that processes requests to Reporting Services. This gateway uses one shared User Account for all Report requests. The Gateway submits the actual Report request using this shared User Account and propagates the results back to the client. The Report renders without the authentication dialog appearing.

If the user attempts to view the Report directly outside Aras Innovator, they still see the authentication dialog as normal. So, users can only view the Reports through Aras Innovator.

The local User Account on the server by default is named 'Reporting' with a default password is 'reporting' and must be mapped as a Role in the Report Server.

3.4.1 Add User Account for Reporting

The administrator for the server where Microsoft Reporting Services is installed must add a new Windows User Account named 'Reporting'. Once the User Account is created Aras Innovator needs to be configured to use account credentials.

3.4.1.1 Configure User Account for On-Premises Innovator instance

Reporting Service configuration is stored in InnovatorServerConfig.xml configuration file. <ReportingServices> section needs to be updated with the username and password:

```
<ReportingServices>
     <ReportServer>http://localhost/ReportServer/</ReportServer>
     <User>Reporting</User>
     <Password>reporting</Password>
          <Domain>Domain for the above User</Domain>
</ReportingServices>
```

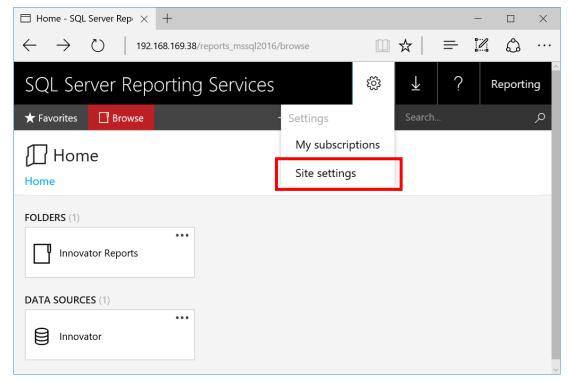
Optional node, <Domain>, should contain the domain name you want to use to connect to Reporting services.

3.4.2 Add the Reporting Role

The **Reporting** User Account must next be mapped as a Role in Reporting Services enabling this account Browser privileges.

1. Create the **Reporting** user on the Server.





2. Click the Site Settings link in the upper right-hand corner of the Report Manager page.

Figure 24.

3. Click the Security tab.

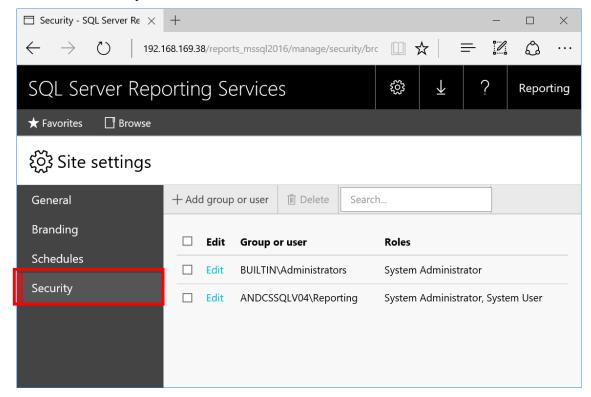


Figure 25.



System Administrator, System User

☐ Security - SQL Server Re × ۵ 192.168.169.38/reports_mssql2016/manage/security/brc ... **SQL Server Reporting Services** £ Reporting ★ Favorites ☐ Browse ঠিই Site settings General 🗓 Delete + Add group or user Search... Branding Edit Roles Group or user Schedules BUILTIN\Administrators System Administrator Edit

4. Click Add group or user to map the Reporting User Account as a Reporting Services Role.

Figure 26.

Edit

Enter the Reporting User Account name, select the System checkbox, and click OK to create the new Role.

ANDCSSQLV04\Reporting

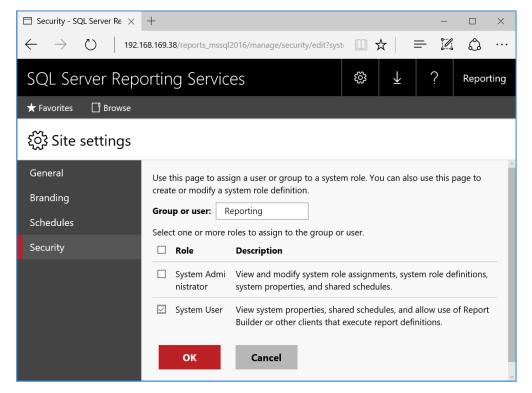


Figure 27.



Security

6. Click the **Browse** link in the upper left corner of the page.

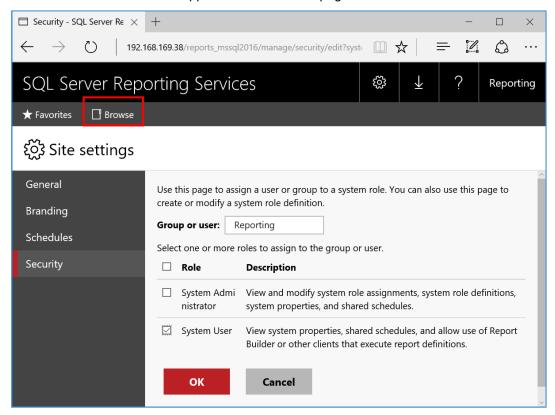


Figure 28.

7. Click the Manage Folder link.

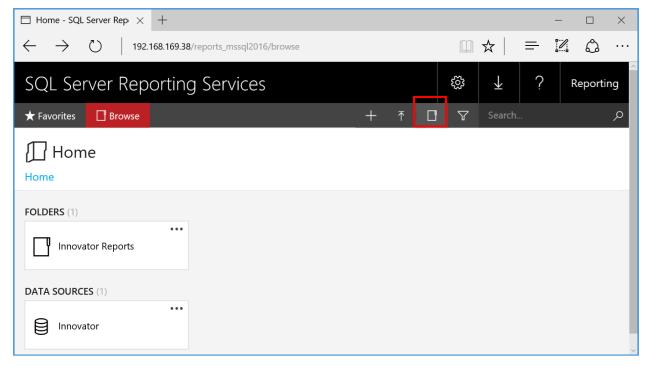


Figure 29.



8. In the settings tab, click Add group or user.

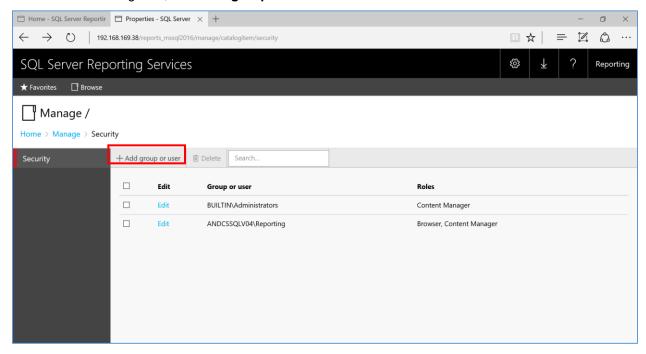


Figure 30.

9. Enter **Reporting** in the **Group or user** field, select the **Browser** checkbox, and click **OK** to create a new Role Assignment for the **Innovator Reports** folder.

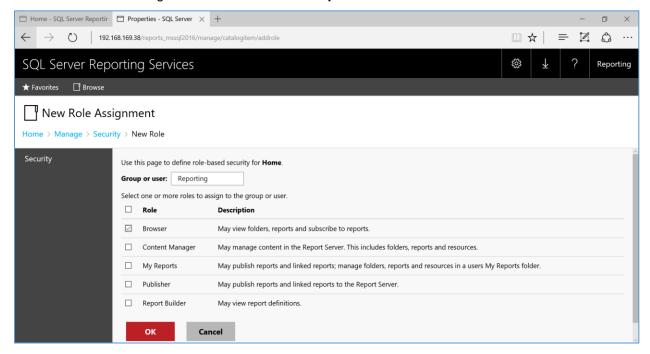


Figure 31.



4 Using Visual Studio for Report Design

Once the Reporting Services is installed, you need to configure Visual Studio to create a Project to hold the Reports. You also need to configure a Shared Data Source, which is the database connection information for the Reports.

Note: It is required that you follow the exact naming conventions as shown here to ensure that the Aras Innovator integration with the Reporting Services works correctly.

4.1 Create a New Report Project

Start SQL Server Data Tools and create a new Innovator Reports project.



Figure 32.

This becomes the **Reporting Services** Folder to hold the Reports for Aras Innovator.

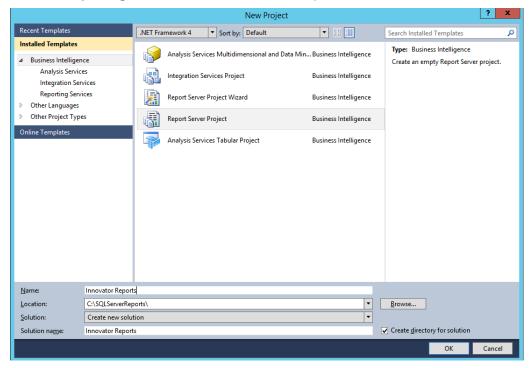


Figure 33.



4.2 Configure Project Properties

- 1. Open the **Solutions Explorer** panel from the **View** --> **Solutions Explorer** menu if it is not already opened.
- 2. Right-click the Innovator Reports folder and select the Properties context menu choice.
- In the Properties dialog, set the TargetServerURL field to the URL of the Report Server. For example, http://localhost:80/ReportServer, where the actual name of the server host name is entered in place of localhost.
- 4. Set the OverwriteDateSources flag to True.

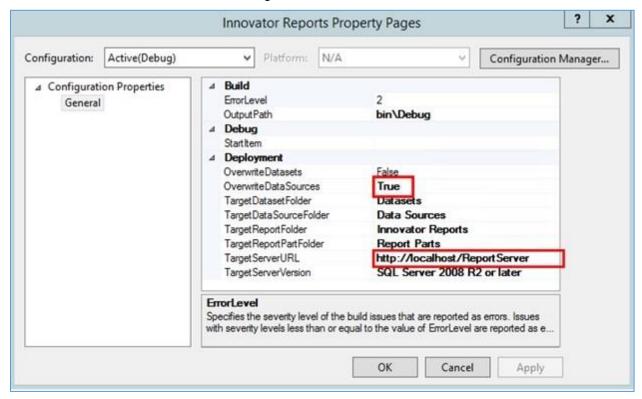


Figure 34.

4.3 Add New Shared Data Source

In the same **Solutions Explorer** panel, right-click the **Shared Data Sources** folder, select **Add New Data Source** context menu choice, and click **Edit** to configure the new data source.

4.3.1 Connection Properties

- 1. Select or enter a server name for the machine with the installed SQL Server.
- Select the Use a specific user name and password option, enter login credentials for the database, and select the Save My password option.



3. Select or enter a database name.

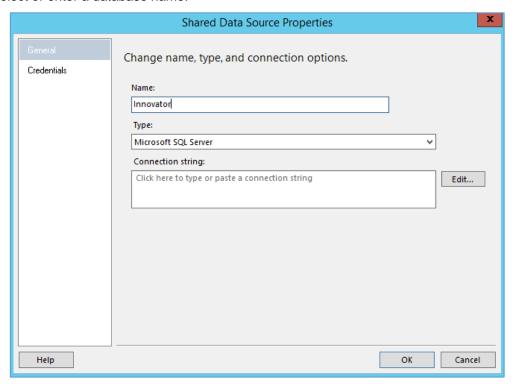


Figure 35.

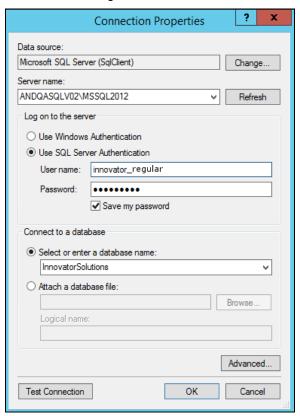


Figure 36.



4.3.2 Deploy the Shared Data Source

By default, the name of the Shared Data Source is the name of the Database you selected previously. You can rename this if you want. Finally, you need to deploy this new Shared Data Source.

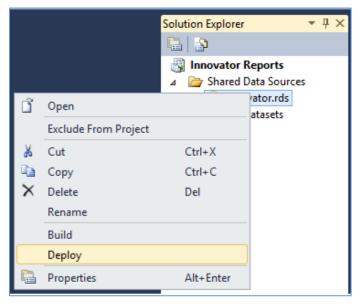


Figure 37.



5 Creating your First Report

This section describes how to create a new Report using the Report Wizard. We will create a simple User Directory Report showing the User's First Name, Last Name, Email, Phone Number, and Company Name.

5.1 Start a New Report using the Wizard

In the **Solution Explorer** panel, right-click the **Reports** folder, and select the **Add New Report** context menu choice.

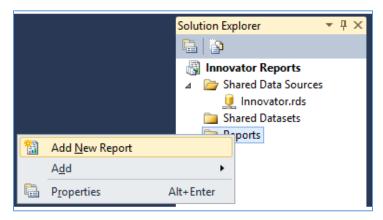


Figure 38.



5.2 Select the Data Source

You can create a unique Data Source for this Report, but you would typically use the default Shared Data Source that you created.

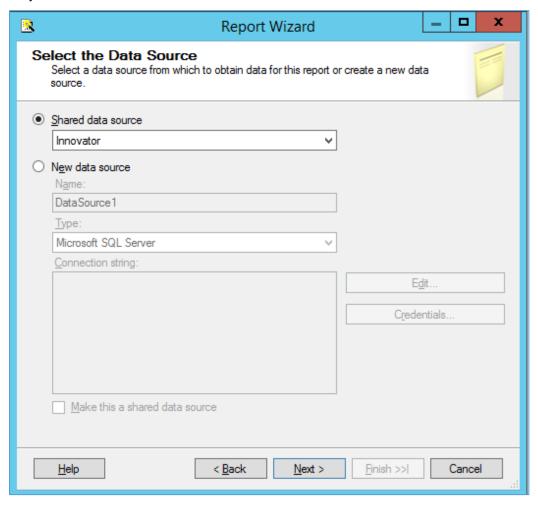


Figure 39.



5.3 Design the Query

You need to provide the SELECT SQL query that fetches data for the Report. In many cases, you can enter a simple SELECT clause directly in the dialog box.

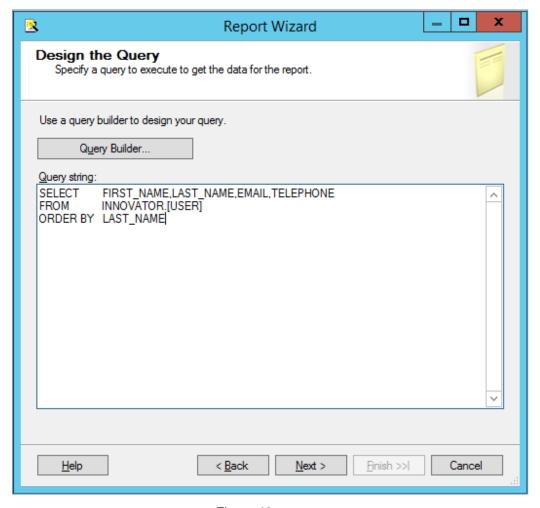


Figure 40.

Note: It is possible to pass Named Parameters into the query such as:

SELECT * FROM [PROJECT] WHERE id=@ID

The Edit... button opens a Query Builder interface, which is covered later in more detail.



5.4 Select the Report Type

There are two choices for the Report Type:

• Tabular: column layout.

• Matrix: rows and columns layout.

Select the Tabular type.

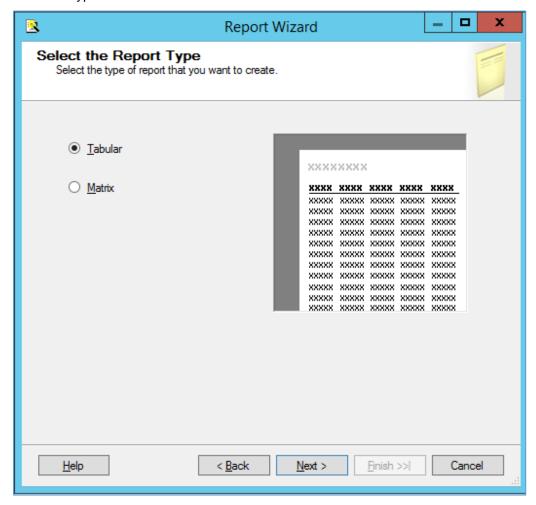


Figure 41.



5.5 Design the Table

Select the fields that you want to show on the Report. In this case, we were selective about which fields to return from the query select clause, so we want all the fields.

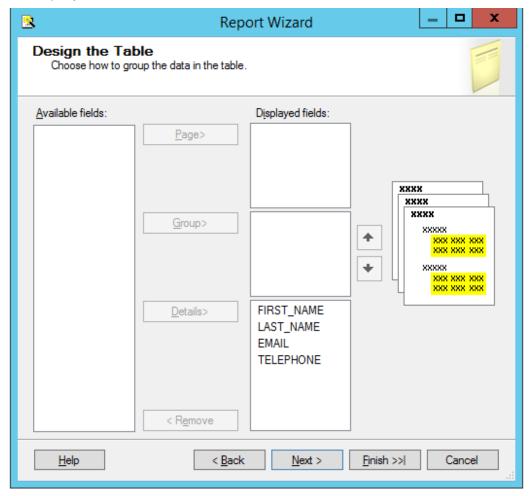


Figure 42.



5.6 Choose the Table Style

Select the table style for the Report. This example simply uses the default **State** style.

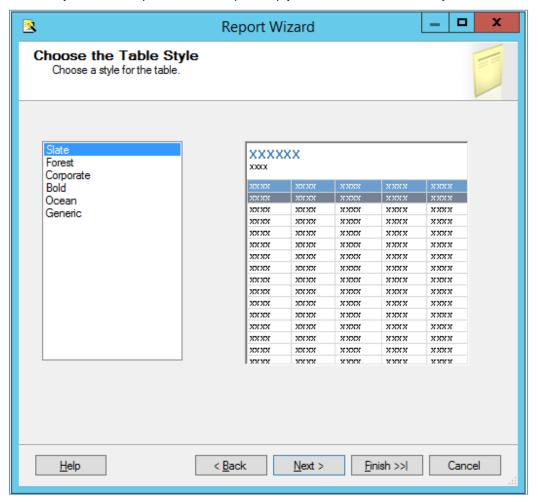


Figure 43.



5.7 Name the Report

The final step in the Report wizard is to name the Report.

Note: The chosen **Report Name** must be meaningful and should be the same name you set as the name of the **Report** Item in Aras Innovator.

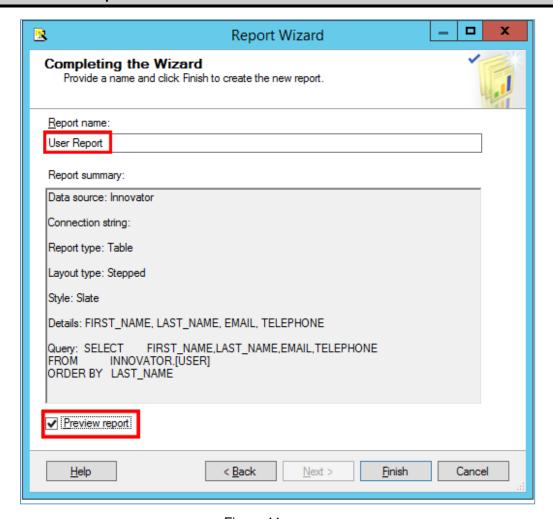


Figure 44.



5.8 Wizard Report Results

The Report wizard builds the report, which looks like Figure 45.

User Report			
FIRST NAME	LAST NAME	EMAIL	TELEPHONE
ES	Admin		
Innovator	Admin		
Vault	Admin		
Super	User		

Figure 45.

Once the Report is opened in the Layout Tab, you can make further changes as required.

5.9 Visual Studio Layout

The **Report** pane has three Tabs:

- **Data**: for editing the query for the Report. Look at the appendix in this document to see a more complex Report query example, using the graphical query builder instead of the wizard.
- Layout: for visually designing the Report with drag and drop functionality.
- **Preview**: for viewing the finished report with real data.

The **Properties** panel on the right is used for setting fonts, color, and other visual properties.

The **Fields** panel on the left is used to drag database fields onto the report.

The **Toolbox** panel also on the left is for dragging Report controls onto the **Report** layout. This is how you can add tables, labels, images, and charts to the **Report** layout.

Note: Use View --> Fields to open the Fields panel when in the Layout mode.

Use View --> Toolbox to open the Toolbox panel.

To open the Header and Footer, right-click to open the context menu in the pink field in the **Report** layout.



5.10 Deploying the Report

Once you are satisfied with the Report query and layout as viewed from the **Preview** Tab, you need to deploy the Report to the Reporting Service:

 In the Solution Explorer panel, right-click the User Directory Report item and select the Deploy context menu choice.

Watch for error messages in the output window at the bottom of the frame.

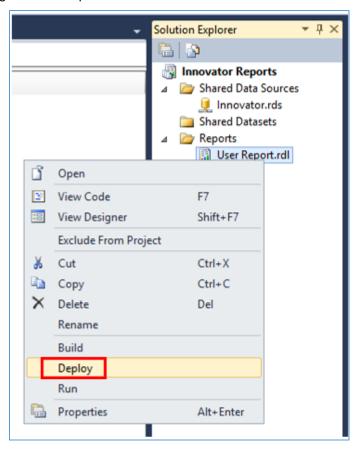


Figure 46.

5.11 Confirm Deployment

To confirm the new Report has been deployed:

- Open a browser and go to http://localhost:80/Reports.
 You should see the Innovator Reports folder.
- 2. Click that link.

You should see the report you created.

- 3. Select the hyperlink for the new Report.
- 4. Run the Report.



5.12 Running the Report from within Aras Innovator

For users to run the new Reporting Services Report from within Aras Innovator, you need to create an **Innovator Report** Item. The important settings to enable the Innovator Reporting Services interface are:

- The Innovator Report Item name must be the same as the Reporting Services Report name.
- The Location Field choice must be set to the new Service option.
- The Report Query Field specifies the parameters that are passed to the Report Server.

5.12.1 Adding Aras Innovator Report Item

- 1. Log into Aras Innovator as administrator.
- 2. In the **Navigation** pane, go to **Administration** --> **Reports**. The menu shown in Figure 47 appears.

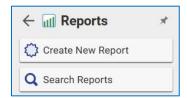


Figure 47.

3. Click Create New Report. A blank Report form appears:

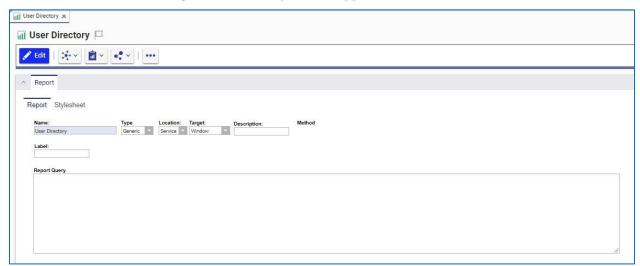


Figure 48.

4. Enter the name of the Report.

Note: Again, this is the name you specified when you created the Report in Visual Studio.

- 5. Select the Report Type, which in this case is **Generic**, meaning this Report is always available.
- 6. Select the Report Location, which in this case is **Service**.
- Select the Report Target, which in this case is Window.
 Because this sample Report is of type ItemType, there is no Report query Value.



Note: If you use Firefox, you have to manually enter a stylesheet under the Stylesheet tab.

8. Test the Report by clicking the **Reports** main menu bar choice.

You should see the new User Report choice.

Click the menu choice.

You should see a new dialog opened with the User Directory Report.

5.12.2 Passing Named Parameters to the ReportServer

As step 4 describes in section 3.1 The Reporting Services use Folders to organize Reports. The Aras Innovator integration with Reporting Services use as the default **Innovator Reports** Folder.

In this section, we configure the Reporting Services using the Report Manager by adding the **Innovator Reports** Folder and a Shared Data Source, which the Reports use to connect to the database.

Installing Reporting Services, the value of the **report_query** Innovator Report Item Property is appended to the ReportServer URL, providing additional parameters to control the ReportServer.

For example, the ID of the Item can be passed as the Named Parameter @ID for the SQL Select for the Reporting Services Report as in this example:

SELECT * FROM [PROJECT] WHERE id=@ID

To pass the ID for the context Item (the selected Item) on the URL to the ReportServer, the Innovator Report Item report guery Property would look like this:

• np:id=<xsl:value-of select="@id"/>

This is actually an XSLT stylesheet fragment and is the directive for Innovator to add the string &id=ACBDEF0123456789ACBDEF0123456789 to the end of the ReportServer URL (but the actual ID value is used).

In this case, the Innovator Report is of the <code>Generic</code> type, so no ID is required, but perhaps we want the Reporting Services Report to be returned in the PDF or Excel format. We can control the ReportServer by adding the following parameter as the **report_query** value for the **User Directory** Report:

rs:Format=PDF

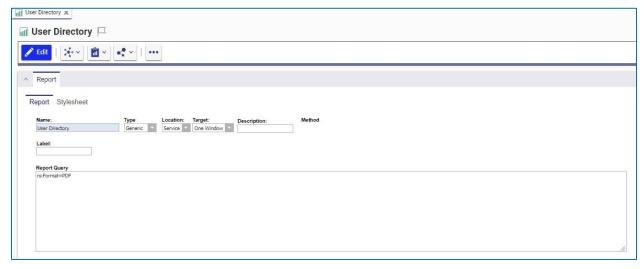


Figure 49.



Note: If you need to include more than one parameter for the report_query value, you need to use the & Entity rather than the actual & symbol to delimit the parameters. Recall that the report_query value is eventually part of the query_string for the URL to the ReportServer but is actually an XSLT stylesheet fragment and so the special symbols like <, >, and & need to be protected in XML need to be entered as Entities &It; > and & respectively.

For example, to pass the Named Parameter ID and the Format PDF in the same **report_query**, the value would look like this:

• np:id=<xsl:value-of select="@id"/>&rs:Format=PDF



6 Report Server query_string Parameters

There are several parameters that you can use to control how the Reporting Services run your Report requests. You include these in the **report_query** Innovator Report Item property, which the client then uses to form **query_string** for the **ReportServer** request.

6.1 Named Parameters

Named Parameters can be passed into the **SELECT** SQL query. For example:

• np:last name=Kohl

They would map the Kohl value to the @last_name Named Parameter in the SELECT SQL:

• SELECT * FROM [USER] WHERE last name=@last name

6.2 Format Parameter

Use the Format parameter to control the format the Report is rendered:

- rs:Format=XML
- rs:Format=PDF
- rs:Format=HTML4.0
- rs:Format=MHTML
- rs:Format=EXCEL
- rs:Format=Word

6.3 Zoom

Use the Zoom parameter to control the zoom:

- rc:Zoom=100
- rc:Zoom=% zoom as integer
- rc:Zoom=Page Width
- rc:Zoom=Whole Page

6.4 Reports Folder

The default Folder where Reporting Services Reports are deployed is in **Innovator Reports**; however, you may deploy the Reports in other Folders, and you specify this using this Parameter:

• irs:Folder=Your Folder Name



6.5 Report Name

The Aras Innovator client automatically appends the Parameter to specify the Report to run on **query_string**, which is the name of the **Innovator Report** Item. However, if you run reports programmatically, you may need to set this directly yourself:

• irs:Report=Your Report Name



7 Report Manager

The **ReportServer** Reporting Services comes with the **Report Manager** page to administer the Reports, Folders, Data Sources, and so on. This page has been integrated into the Aras Innovator client via an Innovator Report that opens the **Report Manager** page; see section 2 for more information about this **Report** Item.

Reports that are created and tested on the development machine can be moved to a production **ReportServer** by exporting an RDL file for a Report from your local development machine and then importing it into the production machine.

The process of exporting a Report, importing it into another **ReportServer**, and enabling the Report in Aras Innovator has four steps:

- 1. Export an RDL file via the **Report Manager** page.
- 2. Import the RDL file via the Report Manager page.
- Reassign the Data Source to the imported Report.
- 4. Add an Innovator Report Item to call the Reporting Services Report.

7.1 Opening the Report Manager page

- 1. In the TOC, go to Administration --> Reports.
- In the main menu, click Reports and the Report Manager choice.
 The Report Manager page opens in a new dialog shown in Figure 41.

SQL Server Reporting Services

★ Favorites

Browse

Manage folder + New ▼ Upload ▼ View ▼ Search.

Home
Home

FOLDERS (2)

Innovator Reports

P Administrator

Figure 50.

Note: This page can be opened from your browser with http://localhost:80/Reports



7.2 Export the RDL

To export an RDL file for a Report:

- Click the Innovator Reports folder.
 You see a list of Reports and Shared Data Sources.
- 2. In the Report context menu, click Manage.

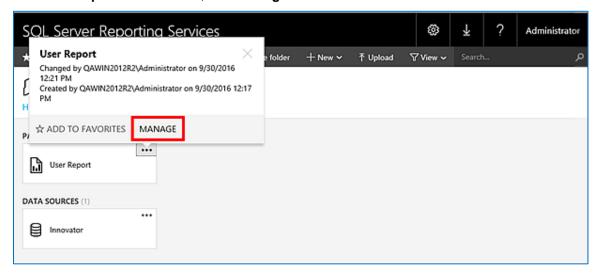


Figure 51.

3. In the User Report page, click Download.

This opens a dialog asking for confirmation that you want to save the RDL file.

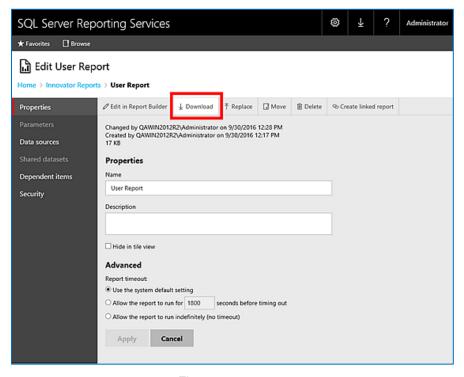


Figure 52.



7.3 Import the RDL

- 1. Log into the target Aras Innovator Server.
- 2. In the TOC, go to Administration --> Reports.
- 3. In the main menu, click Reports and then Report Manager.

The Report Manager page opens in a new dialog as shown in Figure 53.

Note: This page can be opened in your browser with http://localhost:80/Reports.

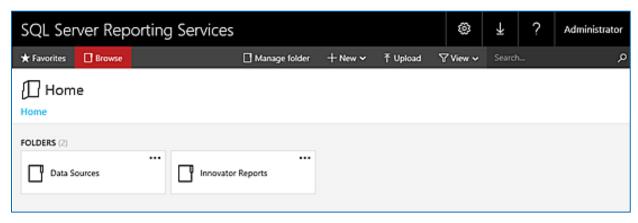


Figure 53.

- Click the Innovator Reports Folder.
 You see a list of Reports and Shared Data Sources.
- 5. Click **Upload** in the dialog middle.

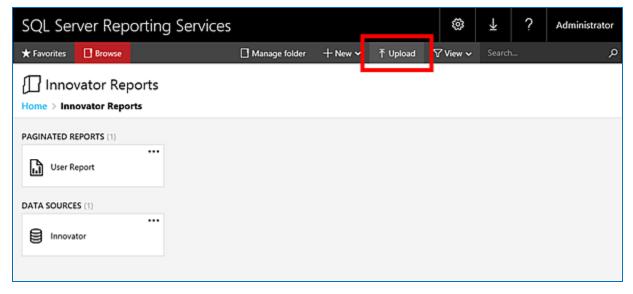
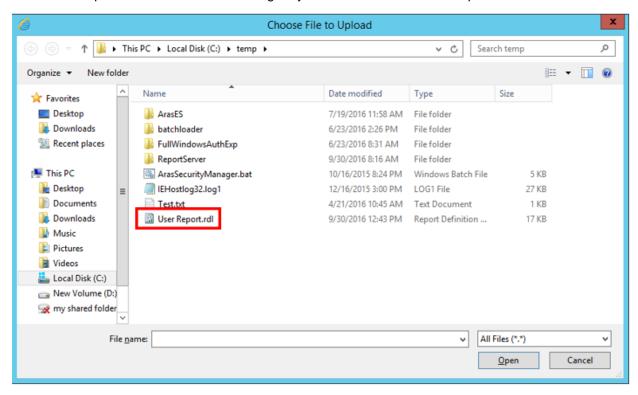


Figure 54.





This opens the File Selection dialog for you to select an RDL file to upload.

Figure 55.

6. Select the RDL file and click Open.

The RDL file is uploaded to the target ReportServer and deployed. You should see the new Report in the Folder now.



7.4 Select the Shared Data Source

The Data Source for the Report may need to be changed if the name of the Shared Data Source is different on the target ReportServer.

1. In the **Report** context menu, click **Manage**.

The **Properties** page for the Report appears where you can select its Shared Data Source.

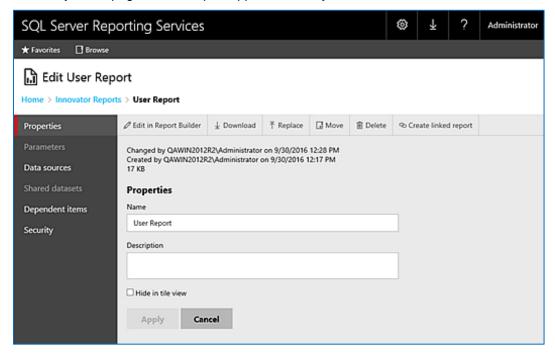


Figure 56.

- 2. Click the **Data Sources** navigation link.
- 3. Select the first A shared data source choice.

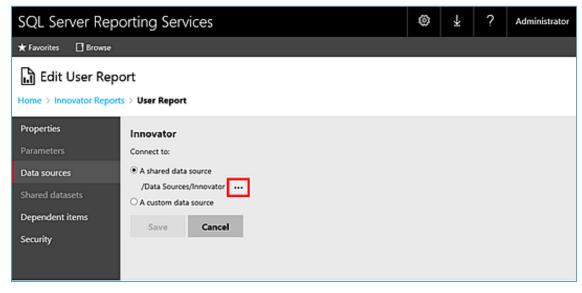


Figure 57.



4. If the named Shared Data Source is incorrect for this ReportServer, click ... to open the **Shared Data Source page**, navigate the Folders to locate the desired Shared Data Source, select it, and click **OK**.

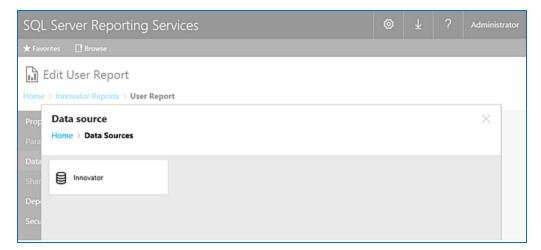


Figure 58.



8 Date Related SQL Queries

AML is the language of Aras Innovator, but some external add-ons do connect to Aras Innovator on a direct SQL level. Because Aras Innovator stores DateTimes in SQL Server as UTC, we have provided an add-on function for Microsoft SQL Server that allows the easy conversion of DateTime to and from UTC.

To convert DateTime values from UTC to a specific time zone, use the <code>ConvertToLocal(value)</code>, <code>{Time Zone})</code> function. The time zone should be specified according to the registry key name of the time zone desired; refer to <code>Aras Innovator 2023 Release - Configuring Internationalization</code>. To use the <code>DEFAULT</code> parameter for the <code>{Time Zone}</code>, it is required that a value be set for <code>CorporateTimeZone</code>.

Example:

```
select item_number, created_on
from innovator.Document

Would be written as:
select item_number, innovator.ConvertToLocal(created_on, DEFAULT) as
CreadtedOn
from innovator.Document

Or:
select item_number, innovator.ConvertToLocal(created_on, 'Eastern Standard Time') as CreadtedOn
```

To convert DateTime values from a specific time zone to UTC, use the

ConvertFromLocal ({value}, {Time Zone}) function. The time zone should be specified according to the registry key name of the time zone desired; refer to Aras Innovator 2023 Release - Configuring Internationalization. To use the DEFAULT parameter for {Time Zone}, it is required that a value be set for CorporateTimeZone.

Example:

from innovator.Document

```
update innovator.Document
set effective_date = '1/1/2007 00:00:00.00'
Would be written as:
update innovator.Document
set effective_date = innovator.ConvertFromLocal('1/1/2007 00:00:00.00', DEFAULT)
Or:
update innovator.Document
set effective_date = innovator.ConvertFromLocal('1/1/2007 00:00:00.00', 'Eastern Standard Time')
```

This allows users to write queries in a familiar time zone context.



```
select item_number, innovator.ConvertToLocal(release_date, DEFAULT) as
ReleaseDate
from innovator.Document
where created_on >= innovator.ConvertFromLocal('1/1/2007
00:00:00.00', DEFAULT)
```

