

OpenReports Installation / Upgrade Guide

**- For Oracle & SQL Server
Version 6.3.1**

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OCLC Amlib Support Documentation:

<https://www.oclc.org/support/services/amlib.en.html>

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OpenReports Installation / Upgrade Guide

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OpenReports Installation / Upgrade Guide

WELCOME

Welcome to the **OPENReports V6.2.1** Installation Guide.

OVERVIEW

The installation of the **Open Reports** involves the following steps:

1. Install OPENReports
2. Configure Database Connection

Note: It can be installed on the Amlib server or a separate server depending whether it's to be for internal use or external use

BEFORE YOU BEGIN THE INSTALLATION...

Before Installing **OpenReports** you **must have** upgraded to or installed **Amlib Version 6.3** on your server. Do not install this program if not on Amlib 6.3.

This install is for both Oracle and SQL Server. This installer can also be used as an upgrade installer, and for initial installs of OpenReports. If you already have OpenReports installed, it will detect your settings and only add anything new in this version.

Read the Installation Notes First

Please carefully read the entire installation guide prior to commencing the actual **OPENReports** installation.

If you have any questions please log a support call on TOPdesk
<https://oclc.topdesk.net/tas/public/login/form>

If you do not know your TOPdesk login please email support-anz@oclc.org and we will send it to you.

Serial Numbers Required for Installation of Amlib Modules

If this is an initial install of **OPENReports**, the installation will require a Serial key. Your library is covered for installation & use of OPENReports by your Library's Amlib licence. Please contact Amlib Support via Topdesk <https://oclc.topdesk.net/tas/public/login/form> before commencing the installation to receive this Serial key. If you are upgrading a serial Key is not required.

OpenReports Installation / Upgrade Guide

OPENREPORTS SUPPORTED OPERATING SYSTEMS & SYSTEM REQUIREMENTS

Operating System	<ul style="list-style-type: none">• <i>Windows Server 2008, 2012, 2014,</i>• <i>Windows 7, Windows 8, Windows 10</i>
.Net Framework	<ul style="list-style-type: none">• <i>4.0 or later including Web Server (IIS) Support and HTTP Activation</i>
IIS	<ul style="list-style-type: none">• 6.0 or later with ASP.net support installed
Java runtime	<ul style="list-style-type: none">• 6.0 or later
Memory (RAM)	<ul style="list-style-type: none">• Minimum 4GB
Browser	<ul style="list-style-type: none">• IE 10 or higher• Chrome, Firefox, Opera
JavaScript	<ul style="list-style-type: none">• Must be activated
Cookies	<ul style="list-style-type: none">• Must be activated• Automatic mobile device detection does not work without cookies. When cookies are disabled, the site can't store culture information [for example, the language that is selected and the date settings] and the login information is stored in a way that is considered to be unsafe.

SECTION 1: PRE REQUISITES

If not installed already you must first install **Adobe Acrobat Reader**

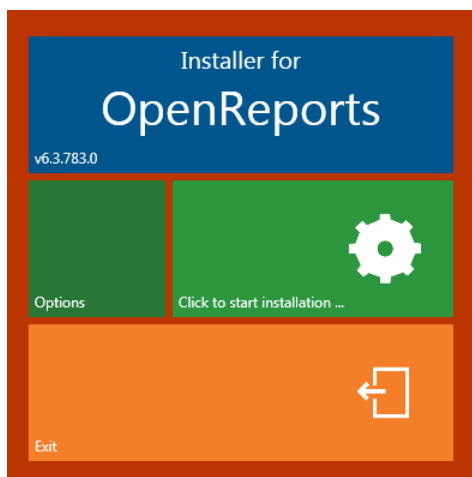
IIS with **ASP.NET** support must also be installed. For information on how to complete this please see **Appendix A and B**.

SECTION 2: INSTALL OPENREPORTS

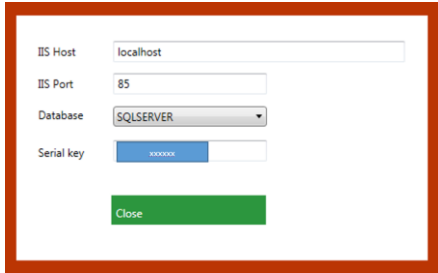
Install OCLC OpenReports

OpenReports Software can all be found in the Version 6.3 folder, here under the '[Set up Programs](#)' tab in the Amlib support section on the OCLC.org website.

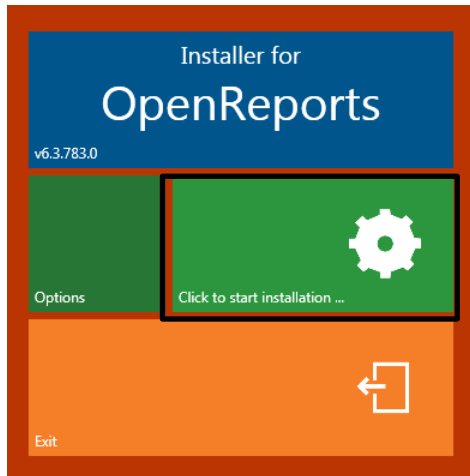
1. Run installer [OCLC.REPORT.OpenReportsSetup.exe](#) – the installer main view screen will display:



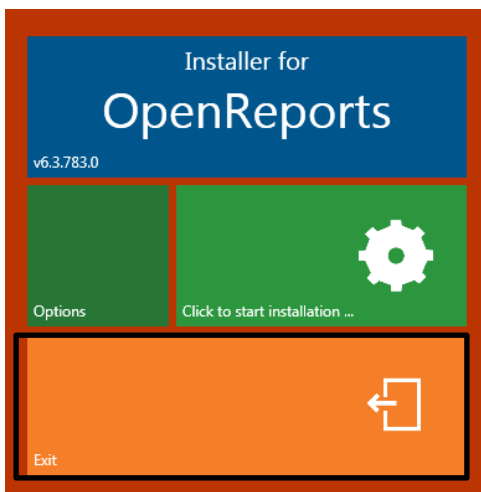
2. Select **Options** - the options view screen will display [if this is an upgrade you can skip these next steps, as your settings will have already been detected, when installer finishes, select exit and begin to use OpenReports]
3. Enter the **IIS host** name, this should be the host name of the server/computer or if it is only to be accessed via network or a public domain name e.g.: <http://library.yourinstitution.com>
4. Enter the **IIS port** number you have assigned to OPENReports.
Note: if you have instances of OpenOPAC installed, to ensure there are no confusion between the port numbers. Each application will need its own port number
5. Enter your **Serial Key** provided by OCLC if required



6. Select **Close** – the installer main view will display with the option to start the installation process enabled:



7. Select **Click to start installation....**
8. On completion of the installation a Complete message is shown on the installer main view:



9. Select **Exit** to finish the installation

SECTION 3: CONFIGURE DATABASE CONNECTION

SQL Databases Customers

1. Open a browser and enter the OpenReports URL. Enter [http:// host name: port number](http://host name: port number) as provided during Installation for example: `http://localhost:86/`

2. The Amlib OpenReports Administration screen will display:
3. Select which database Type you will be using **SQLServer**
4. To set up the connection string for SQLServer the databases being used – SQLServer settings below

Id	Database name	Schema	Connection string	Test
1	AMCAT	dbo	Data Source=localhost\SQLEXPRESS;uid=SYSADM;pwd=SYSADM;initial catalog=AMCAT;	Test
2	AMLIB	dbo	Data Source=localhost\SQLEXPRESS;uid=SYSADM;pwd=SYSADM;initial catalog=AMLIB;	Test
3	AMLOCAL	dbo	Data Source=localhost\SQLEXPRESS;uid=SYSADM;pwd=SYSADM;initial catalog=AMLOCAL;	Test
4	AMSTATS	DBO	Data Source=localhost\SQLEXPRESS;uid=SYSADM;pwd=SYSADM;initial catalog=AM STATS;	Test
				Test

Save

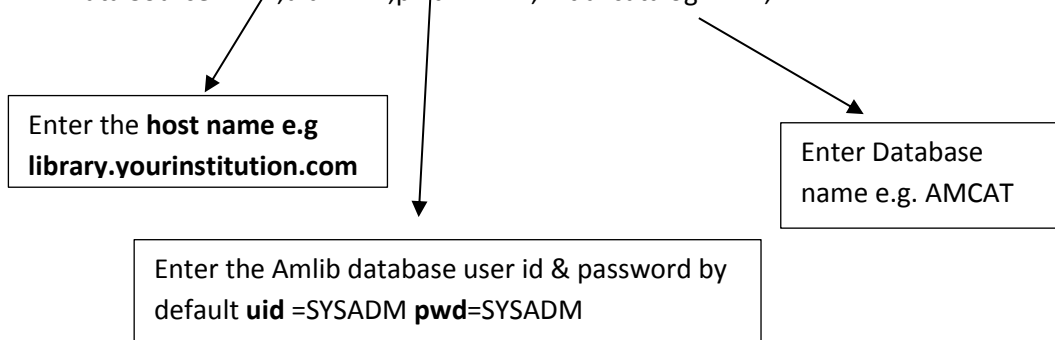
Update the following field:

- a. Update each Database connection string line to reflect your database setup:

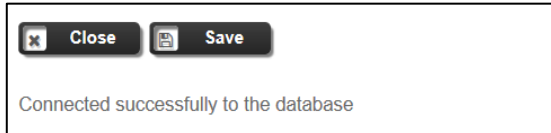
Connection Strings for SQL SERVER:

1. **Id:** Leave as default
2. **Database Name:**
Type in Database name e.g. AMCAT, AMLIB, AMLOCAL, AMSTATS
3. **Schema Name** Leave as default
4. **Connection String:**

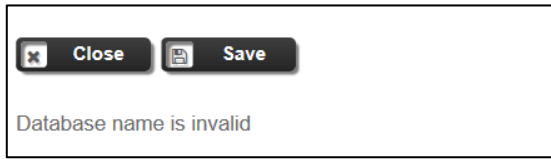
Data Source=**XXX**;uid=**XXX**;pwd=**XXXX**;initial catalog=**XXX**;



- c. To ensure the database connection string have been entered correctly select the **Test** button.
 - i. On entering the database connection correctly, the following message will appear:



- ii. On entering the database connection in-correctly the following message will appear:



See: [Issue 1: Database name Error](#) for resolution

Oracle Database customers:

1. Open a browser and enter the OpenReports URL. Enter http:// host name: port number as provided during Installation for example: `http://localhost:86/`
2. The Amlib OpenReport Administration window will display. Select which database Type you will be using **Oracle**
3. Set up the connection strings for the databases being used updating each Database connection string line to reflect your database setup:

Connection strings for Oracle

Data Source=(DESCRIPTION=(ADDRESS=(PROTOCOL=TCP)(HOST=**x1**)(PORT=**x2**))(CONNECT_DATA=(SERVICE_NAME=**x3**)));Integrated Security=**x4**;User ID=**x5**;Password=**x6**;

X1 = enter the hostname of the server where Oracle is running e.g. `oracleserver.yourlibrary.com`

X2 = enter the database port of your Oracle instance (default=1521)

X3 = enter your Oracle service name (see `tnsname.ora` or `listener.ora`)

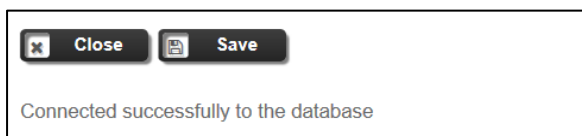
X4 = true if you want to use the operating systems (Windows) security, false if you want to use a supplied username and password

X5 = if x4 is set to false, you must supply a valid database username

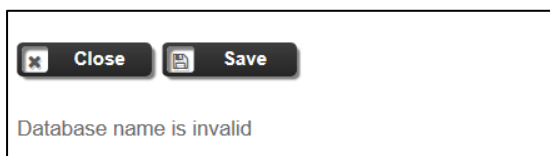
X6 = if x4 is set to false, you must supply a valid database password

To ensure the database connection string have been entered correctly select the **Test** button.

- i. On entering the database connection correctly, the following message will appear:



- ii. On entering the database connection in-correctly the following message will appear:



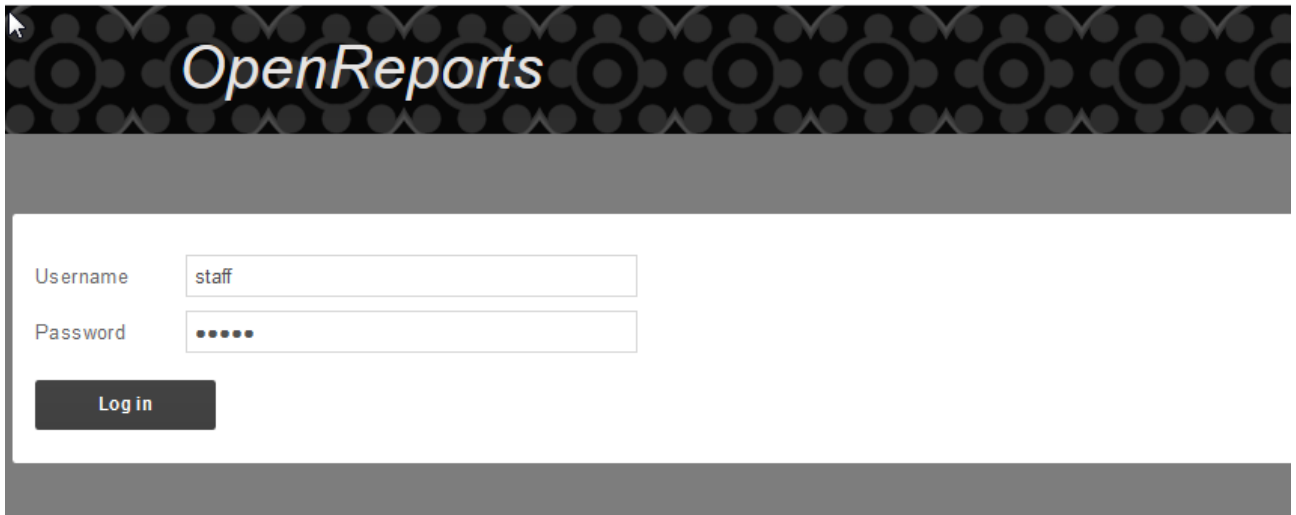
See: [Issue 1: Database name Error](#) for resolution

4. If all database connection strings have been tested correctly select the **Save** button
5. Select the **Close** button to complete the setup

Accessing the OpenReports page

After setting up the connection you should then be able to access the full program (defaults to Port 85)

1. Enter [http:// host name: port number](http://host name: port number) as provided during Installation for example:
<http://localhost:85/>
2. Login with your Amlib Username and Password



OpenReports

Username

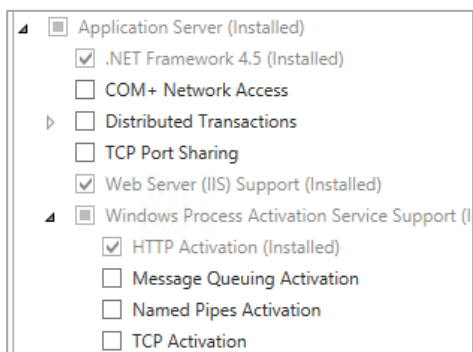
Password

Log in

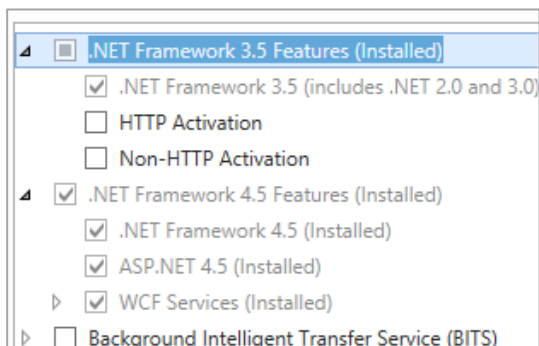
APPENDIX A: INSTALLATION OF REQUIRED .NET COMPONENTS

Windows Server 2012

1. On the **Start** page > Select **Server Manager** Tile > Select **OK**.
2. In **Server Manager** > select **Dashboard** > Select > **Add roles and features**.
3. In the **Add Roles and Features Wizard** [on the **Before you begin** page] > Select **Next**.
4. On the **Select installation type** page > select **Role-based or feature-based installation** > Select **Next**.
5. On the **Select destination server** page > select **a server from the server pool** > select **your server** > Select **Next**.
6. On the **Select server roles** page, expand **Application Server** and ensure the following is installed:



7. On the next page make sure the following are installed:



Confirm and finalise installation, please note that you may require the Windows Server 2012 installation media to complete this installation

Windows Server 2008

Please run the .NET installer provided with the OpenOPAC installers.

APPENDIX B: INSTALLATION/CONFIGURATION OF IIS

Install IIS with .NET support on Windows Server 2012

1. On the **Start** page > Select the **Server Manager** Tile > Select **OK**.
2. In **Server Manager** > Select **Dashboard** > Select **Add roles and features**.
3. In the **Add Roles and Features Wizard**, [on the **before you begin** page] > Select **Next**.
4. On the **Select installation type** page > Select **Role-based or feature-based installation** > Select **Next**.
5. On the **Select destination server** page, select > **Select a server from the server pool**, > select **your server** > Select **Next**.
6. On the **Select server roles** page > select **Web Server (IIS)** > Select **Next**.
7. On the **Select features** page > Select **Next**.
8. On the **Web Server Role (IIS)** page > Select **Next**.
9. On the **Select role services** page, note the preselected role services that are installed by default, expand the **Application Development** node, and then > select **ASP.NET 4.5**. (If you installed **.NET 3.5**, select **ASP.NET 3.5** also.)
10. On the **Summary of Features to install** page, confirm your selections, and then > Select **Install**.
11. In the **Add features that are required for ASP.NET 4.5?** box > Select **Add Features**.
 - The following additional features are added:
12. **.NET Extensibility 4.5**
13. **ISAPI Extensions**
14. **ISAPI Filters**
15. **.NET Extensibility 3.5** (If **ASP.NET 3.5** was selected)
16. > Select **Next**.
17. On the **Confirm installation selections** page > Select **Install**.
18. On the **Installation progress** page, confirm that your installation of the Web Server (IIS) role and required role services completed successfully, and then > select **Close**.
19. To verify that IIS installed successfully, type the following into a web browser:
http://localhost
The default IIS Welcome page is displayed.

Install IIS with .NET support on Windows Server 2008 or 2008 R2

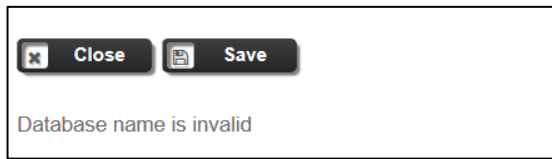
1. Select **Start > Administrative Tools > Select Server Manager**.
2. In **Roles Summary > Select Add Roles**.
3. Use the **Add Roles Wizard** to add the **Web server** role.
4. On the **Select Role Services** page, note the preselected role services that are installed by default, and then select the following additional role services:
 - **ASP.NET**
 - **.NET Extensibility**
 - **Request Filtering**
 - **ISAPI**
 - **ISAPI Extensions**
5. On the **Summary of Features to install** page, confirm your selections > Select **Install**.
6. On the **Installation Results** page, confirm that your installation of the Web Server (IIS) role and required role services completed successfully > select **Close**.
7. To verify that IIS installed successfully, type the following into a Web browser:
http://localhost
You should see the default IIS Welcome page.

Install IIS with .NET support on Windows 7 and Windows Vista

1. Select **Start > Select Control Panel**.
2. In **Control Panel > Select Programs > Select Turn Windows features on or off**.
3. In the **Windows Features** dialog box, Select **Internet Information Services** to install the default features, and then select the following additional features:
 - **ASP.NET**
 - **.NET Extensibility**
 - **Request Filtering**
 - **ISAPI**
 - **ISAPI Extensions**
4. Select **OK** to close the **Windows Features** dialog box.
5. To verify that IIS installed successfully, type the following into a Web browser:
http://localhost
You should see the default IIS Welcome page.

APPENDIX C: TROUBLESHOOTING

Issue 1: Database name Error



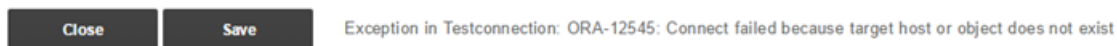
Resolution: The above message indicate either the database name and/or connection string have been defined incorrectly.

Please verify the database name specified by checking the SQL.ini file inside your /Amlib folder on your server.

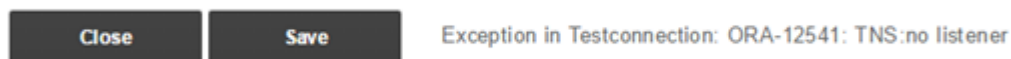
Oracle Customers

Here are some possible errors if the Oracle connection string is not correct.

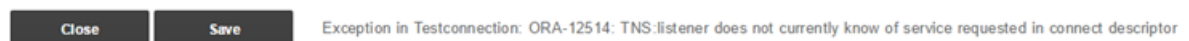
Check the **Host name** if following error occurs



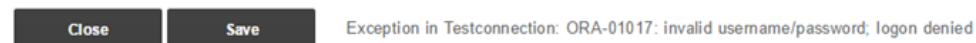
Check the **port number** if following error occurs



Check the **TNS service_name** if following error occurs



Check the oracle **username and password** if following error occurs



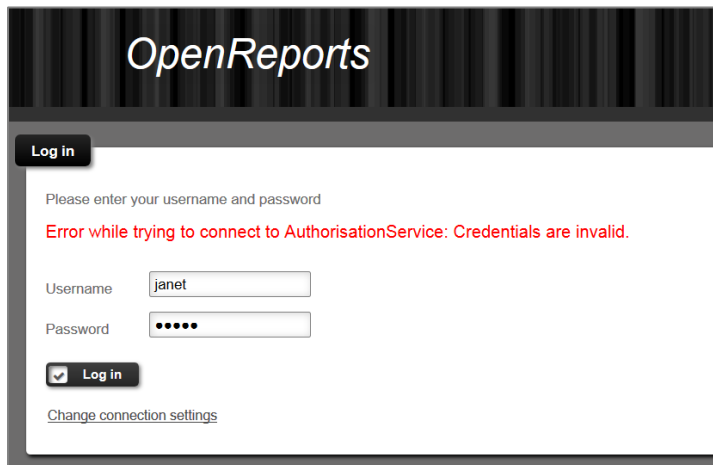
Issue 2: Authorisation Service Connection Error



Resolution: The above message indicate that database name specified inside the 'Connection Settings' screen contains invalid characters.

Please verify the database name specified by checking the SQL.ini file inside your /Amlib folder on your server.

Issue 3: Error while trying to connect to Authorisation Service: Credentials are invalid.



Resolution: The above message indicate that either the username and/or password entered are incorrect.

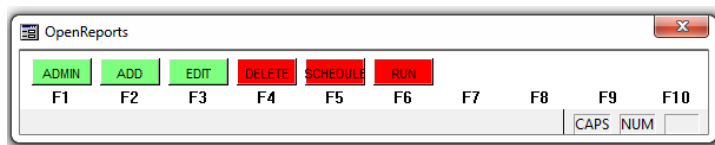
Please log into Amlib Client and go to **Main>Supervisor>Username**, and verify that the username exists within the 'Username' table and also password assigned is correct.

User Name	Location	Circ at this Location Only (Y/N)	Level
JASON	BRIM	Y	100
OPAC	MOBILE	Y	10
PETER	CHELSEA	Y	100
STAFF	CHELSEA	N	50

Please refer to the Amlib User Names Guide available on the OCLC website on how to add new & update existing login within Amlib.

Also check user Viewing buttons for OpenReports to ensure user has permissions to log in & use OpenReports

Main > Supervisor > Usernames > Select Username > F8Choose > Viewing menu >OpenReports



Then Select the Red buttons to turn them green, this will give user access to the different aspects of OpenReports; to Login they need the **Admin** viewing button

<https://www.oclc.org/support/services/amlib/documentation/how-to-guides-documentation/supervisor.en.html>