OpenReports
Installation Guide

Version 6.2

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WELCOME

Welcome to the OPENReports 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 6.1 on your server.

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

The OPENReports installation requires 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.
## OPENREPORTS SUPPORTED OPERATING SYSTEMS & SYSTEM REQUIREMENTS

| **Operating System**       | • *Windows Server 2008, 2012*  
|                           | • *Windows 7*                  |
| **.Net Framework**         | • *4.6 or higher including Web Server (IIS) Support and HTTP Activation* |
| **IIS**                    | • *6.0 or later with ASP.net support installed* |
| **Java runtime**           | • *6.0 or later*              |
| **Memory (RAM)**           | • *Minimum 4GB*              |
| **Hard Disk**              | • *Minimum 40GB depending on the size of the catalogue* |
| **Browser**                | • *IE 10 or higher*          
|                           | • *Chrome, Firefox, Opera*  |
| **JavaScript**             | • *Must be activated*        |
| **Cookies**                | • *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 6.2 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

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](http://library.yourinstitution.com)

4. Enter the **IIS port** number you have assigned to OPENReports.
   *Note: if you have instances of NetOPAC or OpenOPAC installed 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
6. Select **Close** – the installer main view will display with the option to start the installation process enabled:

![Installer for OCLC OpenReports](image)

7. Select **Click to start installation**...

8. On completion of the installation a Complete message is shown on the installer main view:

![Installer for OCLC OpenReports](image)

9. Select **Exit** to finish the installation
SECTION 3: CONFIGURE DATABASE CONNECTION

1. Open a browser and enter the OpenReports URL. Enter http://host name:port number as provided in section 1, step 5 for example: http://library.yourinstitution.com:85/

2. Select the Change connection button on the top right-hand corner - the database connection screen will display:

3. Update the following field:
   a. Leave the Authorisation Service as default:
   b. Update each Database connection string line to reflect your database setup:
      a. Id: Leave as default
      b. Database Name: Type in Database name
e.g. AMCAT, AMLIB, AMLOCAL, AMSTATS
      c. Schema Name: Leave as default
d. **Connection String:**
   
   Data Source=XXX;uid=XXX;pwd=XXXX;initial catalog=XXX;

Enter the **host name** e.g. library.yourinstitution.com

Enter the **Database name** e.g. AMCAT

Enter the Amlib database user id & password by default **uid** =SYSADM **pwd** =SYSADM

---

e. 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:

   ![Connected successfully to the database](image)

   ii. On entering the database connection **incorrectly** the following message will appear:

   ![Database name is invalid](image)

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

4. If all database connection string have been tested correctly select the **Save** button

5. Select the **Close** button to complete the setup
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:

    ![Application Server Roles]

    - .NET Framework 4.5 (Installed)
    - HTTP Activation
    - Non-HTTP Activation
    - ASP.NET 4.5 (Installed)
    - WCF Services (Installed)
    - Windows Process Activation Service Support

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

    ![.NET Framework 3.5 Features]

    - .NET Framework 3.5 Features (Installed)
    - .NET Framework 4.5 Features (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.
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. The below example of the SQL.ini file indicate that the correct database name which are: AM6CAT, AM6LIB, AM6LOCAL, AM6STATS & AM6WEB that need to be entered into the ‘Connection Settings’ under the Database name field, and huynhpmn needs to be entered into the connection string field:
### Issue 2: Authorisation Service Connection Error

**Resolution:** The above message indicates that the 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. *The below example of the SQL.ini file indicate that the correct database names which are: AM6CAT, AM6LIB, AM6LOCAL, AM6STATS & AM6WEB that need to be entered into the ‘Connection Settings’ screen*

```sql
[[Odbcext]]
; The following is for the ODBC / SQLServer router. The DSN keyword will be the same as the System Data Source name in the ODBC32 admin
; in Control Panel
longbuffer=20000

REMOTEDNAME=AM6CAT, DRIVER=SQL Server;SERVER=huynhpme\SQLExpress;DATABASE=AM6CAT
REMOTEDNAME=AM6LIB, DRIVER=SQL Server;SERVER=huynhpme\SQLExpress;DATABASE=AM6LIB
REMOTEDNAME=AM6LOCAL, DRIVER=SQL Server;SERVER=huynhpme\SQLExpress;DATABASE=AM6LOCAL
REMOTEDNAME=AM6STATS, DRIVER=SQL Server;SERVER=huynhpme\SQLExpress;DATABASE=AM6STATS
REMOTEDNAME=AM6WEB, DRIVER=SQL Server;SERVER=huynhpme\SQLExpress;DATABASE=AM6WEB
```

### Issue 3: Installer fails to install correctly – please send the installer log file to the Amlib support staff.

**Resolution:** Please Log a Topdesk call for assistance [https://oclc.topdesk.net/tas/public/login/form](https://oclc.topdesk.net/tas/public/login/form)

And attach the log files created during the install process that you will find here:

*C:\Users\username\AppData\Local\Temp\OpenReports_201606xxxxxxx.log*
Issue 4: Error while trying to connect to Authorisation Service: Credential 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.

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

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