

# **External Reports**

Instruction Guide

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## **1.0 Installing External Reports for SIM™**

Key reports are accessible from within SIM<sup>™</sup> manager via the Reports Tab. Additional reports are available external to the SIM<sup>™</sup> system. These reports rely on Microsoft's SQL database and report writer tools.

To access external reports, your IT department may need to make changes to the server on which the SIM<sup>™</sup> system operates. Instructions on how to set this up are provided in this manual and may need to be modified depending on your facility's specific IT infrastructure.

The external reports, although useable as they are, are provided as a starting point for your facility to design reports tailored specifically to your needs. The number and variety of external reports will increase over time, please refer to Simavita's training web-site regularly for updates <a href="http://simavita.com/training/">http://simavita.com/training/</a>.

### 2.0 Notes for the Person Installing

The SIM<sup>™</sup> system utilises an SQL database to store information. This database is installed on the SIM<sup>™</sup> server on which the SIM<sup>™</sup> software operates. By default this database is not accessible from client machines. To access external reports (either for editing or running reports) additional system setup steps need to be taken.

This document provides a guide to the steps required to gain remote access to the server's database. These steps are not specific to SIM<sup>™</sup> but are related to Microsoft's SQL database infrastructure and Microsoft's SQL report writing tools. Please refer to information provided by Microsoft for additional details.

Following are five main sections:

- 3.0 Information on Server User Permission: This section covers required permissions in the SIM<sup>™</sup> server to access external reports from client machines.
- 4.0 Client Computer Access for Reporting (no editing): This section describes the process of configuring the server (running the SIM<sup>™</sup> software and SQL database) to allow client computers database access via an SQL web interface. This is useful for accessing reports for reporting purposes only (no editing is possible).
- 5.0 Adding External Reports to the Server: This section covers access to reports on client machines for reporting and editing.
- 6.0 Editing and Reporting from Client Computers: This section is similar to section "4.0 Client Computer Access for Reporting (no editing)" but includes additional instructions to provide editing capability from the client computer.
- 7.0 Using SQL Report Builder: This section provides a brief primer to writing and running SQL reports using SQL Report Builder

### Note:

It is expected that the reader has prior knowledge of SQL, configuring an SQL database server and SQL Report Builder before applying any information provided in this document. This document is provided as a setup guide only and setup may differ depending on specific IT infrastructure.

### CAUTION

Editing or modifying any information in the SIM<sup>™</sup> SQL database may render the SIM<sup>™</sup> system inoperable.

### CAUTION

There are important data security implications with providing remote database access. This document does not cover or discuss any these. Please refer to information provided by Microsoft for further details.

**Pre-requisites:** To view, modify or create the external reports, Report Builder 3.0 (Microsoft SQL Server) or Microsoft SQL Server Reporting Services (SSRS) must installed on the server running the SIM<sup>™</sup> system and/or the client machines. The reports will not be accessible or function from remote machines unless step described in this document are performed.

### **3.0 Information on Server User Permission**

To access the SIM<sup>™</sup> system database for reporting purposes, the SIM<sup>™</sup> system server user (often the Administrator) must have clicked 'Select' and 'Execute' permissions in SQL server for SIMdb30 and SIMdb30Audit databases. To do this, follow these steps:

1. On the SIM<sup>™</sup> Server, open SQL Server Management Studio:



2. Press connect in the "Connect to Server" window:

🛃 Connect to Server	×
SQL S	<b>erver</b> 2008 R2
Server <u>t</u> ype:	Database Engine 💌
<u>S</u> erver name:	WIN-V6ABK0DGR94\SIMSERVERDV3
Authentication:	Windows Authentication
<u>U</u> ser name:	WIN-V6ABK0DGR94\Administrator
Password:	
	Remember password
Connect	Cancel Help Options >>

3. From the Tree View on the left, Expand Database ->SIMdb30. Right click on SIMdb30 and press Properties. In the pop-up window, click on Permissions from left menu titled "Select a page". Select "NT AUTHORITY/IUSR" user. In the bottom grid, ensure that for Execute and Select row, the checkboxes are checked under the Grant column is checked.

🔨 Microsoft SQL Server Management Studio							
File Edit View Debug Tools Window Community Help							
🕂 🋄 New Query   📭   🕞 📓 🚔 🜉 👦							
Object Explorer + 4 × Database Properties - 51Mdb30							
Connect 🕶 📑 📑 👅 😰 😼	Select a name						
🖃 🐻 WIN-V6ABK0DGR94\SIMSERVERDV3 (SQL Server 10DGR94\4	🚰 General	🗁 actific 🔸 🔝 Helb					
🖃 🚞 Databases	🚰 Files	Server name:	WINA/66	BKODGB94\SIM	SEBVEBDV3		
🕀 🧰 System Databases	Filegroups	Jerver name.	June voer	51(05/01154/5101	JEINVENDARS		
	😭 Uptions	View server permissions					
		Database name:	SIM4630				
🛨 🧰 Database Diagrams	Extended Properties	Users or roles:				Sea	arch
		News					
Views     Syponyme						Туре	
						User	
						User	
			10511			0361	
I I I I Users							
🕀 🧰 Asymmetric Keys							
Certificates							
🖽 🛄 Symmetric Keys		Permissions for NT ALITH					
	Connection		ionni aosn.				
🕀 🧰 Server Objects	Server:	Explicit Effective	1-	1-	1	1-	
	WIN-V6ABK0DGR94\SIMSERVE	Permission	Grantor	Grant	With Grant	Deny	
🛨 🧰 Management	Connection:	Execute	dbo	<u> </u>			_
	WIN-V6ABK0DGR94\Administratc	Insert	dbo	►			
	View connection properties	Hererences	dbo				
		Select					
	Progress	Show plan					
	Ready	Take eurorehin	dbo				
	New York	Lake ownership	dbo				
			000				•1
					01		
۲					UK		ncel

## **4.0 Client Computer Access for Reporting (no editing)**

This section describes the process of configuring the server (running the SIM<sup>™</sup> software and SQL database) to allow client computers database access via an SQL web interface. This is useful for accessing reports for reporting purposes only (no editing is possible).

1. On the server running the SIM<sup>™</sup> system database, open Reporting Service Configuration Manager.

Programs (4)			
🗐 Report Builder 3.0			
😵 Report Builder 3.0 Help			
Reporting Services Configuration Manager			
🗎 SQL Server Error and Usage Reporting	Location:	RSConfigTool (C:\Program Files (x86)\Microsoft SQL Se	erver\100\Tools\
Control Panel (10)	Dirity		
Thoose how to report problems			
🚩 View all problem reports			
🚩 View the Microsoft error reporting privacy statement online			
📆 Generate a system health report			
🚩 View recent messages about your computer			
review your computer's status and resolve issues			
Yiew solutions to problems			
🚩 Fix problems with your computer			
ightarrow View recommended actions to keep Windows running smoothly			
🚩 View message archive			
$\wp$ See more results			
repor			
🎦 Start 🛛 🥾 😰 🚞 🧿			

2. Press Connect on the pop up window.

Reporting Services Configuration	Manager			
Reporting Services Cor	2 nfiguration Manager			
Service Account				
🐊 Web Service URL	Reporting Services Configurat	ion Connection	×	
Database	SQL Server 20 Reporting Service	008 R2		
Report Manager URL	Please specify a server name, cli instance to configure.	ick the Find button, and select a report serve	r	
🚖 E-mail Settings	Server Name:	WIN-V6ABK0DGR94	<u>Fi</u> nd	
Execution Account	Report Server <u>I</u> nstance:	SIMSERVERDV3	•	
R Encryption Keys				
u <sup>™</sup> ⊔ Scale-out Deployment	0		Cancel	
	<u>.</u>			
Ø				Apply Exit

3. Click on "Report Manager URL". Change the Virtual Directory to "Reports" from "Reports\_SIMSERVERDV3" and press Advanced button.

Segment	Report Manager URL		
WIN-V6ABK0DGR94\SIMSERVERDV3  Service Account	Configure a U parameters or	RL to access Report Manager. Click Advanced to define multip 1 the URL.	le URLs, or to specify additional
🧀 Web Service URL	Report Manager Site Iden <u>V</u> irtual Directory:	Reports SIMSERVERDV3	
🔰 Database	<u>U</u> RLs:	http://WIN-V6ABK0DGR94:80/Reports_SIMSERVE	Advanced
Report Manager URL			
🚖 E-mail Settings			
Execution Account			
🌂 Encryption Keys			
📩 Scale-out Deployment			
	Results		
			Copy
0			<u>Apply</u> <u>Exit</u>

4. On clicking "Advanced" button (as seen in Step 3), will bring up a pop up window as below. Click on the first Edit button.

vanced Multiple Web Site Configuration					
Multiple Identities for F	Report Mana	ger —			
IP Address		TCP Por	't	Host Header	
All Assigned		80	·		
Add 	Add <u>R</u> emove <u>E</u> dit Multiple SSL Identities for Report Manager				
IP Address	SSL Port		SSL Certifical	e Issued To	
A <u>d</u> d		Rer	no <u>v</u> e	Ed <u>i</u> t	
Ø			ΟΚ	Cancel	

5. In the next pop up window, change the IP Address drop down list from "All Assigned" to the specific IP address of the server (in the example below this is 192.168.0.161) and press OK and then click Apply in the main window (please make sure the Virtual Directory has changed to "Reports" from "Reports\_SIMSERVERDV3", or change it again as described in Step 3).

Edit a Report Manager H	ITTP URL
Identification	
IP Address	192.168.0.161
C Ho <u>s</u> t Header Name	All Assigned All Unassigned 192 168 0 161
TCP Port	[::1] 127.0.0.1
URL	http://wIN-V6ABK0DGR94:80/Reports
0	<u>O</u> K <u>C</u> ancel

6. Now the external reporting system is accessible with entered IP address within the network <u>http://[SIM Server IP]/Reports (for example: http://192.168.0.161/Reports</u>). Open Internet Explorer (on the server machine) and enter the IP address (as above) into the Address Bar and press Enter. The following pop up

window will appear for login:

Ahttp://192.168.0.161/Reports/ - Windows Internet Explorer	_ 🗆 X
ⓒ	☆ ☆
Windows Security       Connecting to 192.168.0.161.       User name       Password       Domain: WIN-V6ABK0DCR94       Remember my credentials	

7. Enter the Windows login credentials for the **server** Administrator or the currently logged in server user. SQL Server Reporting Services page will come up

	ගි ර Home   Site Settings   H
	Home   Site Settings   H
Boll Server Reporting Services	Search .
🞬 New Folder 🔰 🧕 New Data Source 👔 🕍 Folder Settings 👔 🌓 🕐 Upload File 🏢 Details View	
here are no items in Home. Click Help for more information about this page.	

- If there is a red message saying "This page might not function correctly because either your browser does not support scripts or active scripting is disabled", then follow the instruction provided on this link "<u>http://www.mytechmantra.com/LearnSQLServer/Troubleshooting-SQL-Server-Reporting-Service-Error.html</u>" to enable active scripting for the browser.
- 9. To Add the External Reports to Reporting Services for web access, click on the "Upload File" (red box in Step 7). Note that report templates can be downloaded from Simavita's training website. In the subsequently displayed screen, click the Browse button which will pop up a File Browser window. Go to "External Report Templates" folder on the server's desktop. Enter a filename (or select a file to replace) and press Open and then OK in the Upload File page.

CUpload File - Report Manager - Internet Explorer	rt Manager 🗙 📃		□_ ☆ ☆	1×1 ⇔	
Home			Home   Site Settings   H	lelp	
SQL Server Reporting Services Upload File			Search	٩	
Upload a report (.rdl), model (.smdl), shared dataset (.rsd), report part (.rsc), or other File to upload: Browse	C:\Us	ad ers\Put	li¢\Desktop\External Report Templates	💌 🚱 Search Extern	al Report Templ
Name: New Item	Organize 🔻 New fo	lder			:= - 🗔 🕡
OK Cancel	☆ Favorites	-	Name *	Date modified	Туре
	Desktop	Desktop	🔄 ACFI Report	8/20/2014 2:42 PM	Report Builder Repo
	Source Free Courses (1997) Interest Int		Audit Report	1/6/2014 10:03 AM	Report Builder Repo
	Libraries           Documents           Music           Pictures           Videos		i Concinence Schedule - wing Report	8/19/2014 2:23 PM	Report Builder Repo
	I툎 Computer 실 Local Disk (C:)	•	<u>ا</u>		
4		File n	ame: Audit Report	All Files (*.*)	Cancel

- 10. Now the report will show in the SQL Server Reporting Services Homepage. Follow the step above to add all the reports to the web reporting system.
- 11. Now any user on client machines can go to address (<u>http://<IPADDRESS>/Reports</u>) in Internet Explorer and view the reports with the login credentials of the SIM<sup>™</sup> system server Windows login. Note that this is a significant security risk. It is preferable to create one or more normal user accounts (without admin privileges) on the SIM<sup>™</sup> system server and give the individual users permissions for viewing the reports. To do this, follow the subsequent steps.
- 12. To create a user account with standard login privileges, on the server, open Control Panel and click "Add or remove user accounts" under User Accounts.



13. Click "Create a new account".

🍇 Manage Accou	unts		
<b>€</b> 0- <b>®</b>	+ User + Manage A	👻 🚺 Search Control Pan	iel 😥
Choose the acco	ount you would like to change		<b>^</b>
2	<b>Administrator</b> Administrator Password protected		
	Guest Guest account is off		
Create a new acco	punt		
What is a user acc	count?		
Additional thing	is vou can do		
Go to the main Use	er Accounts page		
			•

14. In the next page, enter "report" or any other preferred username in the textbox and check the "Standard user" and then click "Create Account".

🎎 Create New Account 📃 🗆 🗙
🌀 🗇 🗟 🔹 Mana 🔹 Create N 🔹 🛃 Search Control Panel 😥
Name the account and choose an account type
This name will appear on the Welcome screen and on the Start menu.
⊙ Standard user
Standard account users can use most software and change system settings that do not affect other users or the security of the computer.
C Administrator
Administrators have complete access to the computer and can make any desired changes. Based on notification settings, administrators may be asked to provide their password or confirmation before making changes that affect other users.
We recommend that you protect every account with a strong password.
Why is a standard account recommended?
Create Account Cancel

15. You will be brought back to the Manage Account window. Click on the "report" or the newly created user. In the next window, click on "Create a password".



- 16. Provide a strong password which should be at least 8 characters, containing at least one capital letter, one number and one special character (For example "RepOrt!@#"). Provide a hint for the password and press "Create password".
- 17. Go to web report URL (<u>http://<IPADDRESS>/Reports</u>) and login with Admin (or logged in user). Click on the "Folder Settings" link.



18. In the next page, click "New Role Assignment"

<i>ể</i> - Report Manager	- Windows Internet Explorer			
	//192.168.0.161/R 🔎 🗲 🏼 🍯 - Repor	t Manager 🛛 🗙	tîn tê	7 🔅
			Home   Site Settings   Hel	p
SQL Serv	er Reporting Services			
Home			Search 🔎	
	🗙 Delete 🛛 🎥 New Role Assign	nment		
Security	□ Group or User ↓	Role(s)		
	Edit BUILTIN\Administrators	Content Manager		
XXXXXX				
				~

19. In the New Role Assignment page, put the "report" or the newly created username in the "Group or user name" text box. Check the "Browser" checkbox and press OK.

🥭 New I	Role Assignment - Report M	anager - Windows Internet Explorer	
00	▼ Attp://192.168.0.161	/R 🔎 🗾 🐓 🥔 New Role Assignment - Repo 🗙	合 🛧 铙
Home			Home   Site Settings   Help
<b>@</b>	SQL Server Reportin	g Services	<u></u>
r	New Role As	signment	Search 🔎
Use	this page to define role-bas	ed security for Home.	
Grou	ip or user name: report		
Sele	ct one or more roles to ass	ign to the group or user.	
	Role 🕹	Description	
-	Browser	May view folders, reports and subscribe to reports.	
	Content Manager	May manage content in the Report Server. This includes folder	s, reports and resources.
	My Reports	May publish reports and linked reports; manage folders, reports folder.	and resources in a users My Reports
	Publisher	May publish reports and linked reports to the Report Server.	
	Report Builder	May view report definitions.	
	OK Cancel		~

20. Data read permissions also need to be given to the newly created user from the SQL Server. On the server, open SQL Server Management Studio:

Programs (2)	
SQL Server Management Studio	
SQL Server Configuration Manager	Location: Ssms (C:\Program Files (x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\Common7\IDE)
₽ See more results	
SQL Server Man Log off	
🌆 🛃 🔁 😭 🧿	

21. Press connect in the "Connect to Server" window:

🛃 Connect to Server	X
Microsoft* SQL	Server <sup>-</sup> 2008 R2
Server type:	Database Engine
<u>S</u> erver name:	WIN-V6ABK0DGR94\SIMSERVERDV3
Authentication:	Windows Authentication
<u>U</u> ser name:	WIN-V6ABK0DGR94\Administrator
Password:	
	Remember password
<u>C</u> onnec	t Cancel Help Options >>

22. From the Tree View on the left, Expand Database -> SIMdb30 -> Security -> Users



23. Right click Users and click on "New User". In the pop up window, for User name and Login name text boxes enter "BUILTIN\Users". In the 2<sup>nd</sup> group of checkboxes (Database role membership), select db\_datareader and press OK.

🧵 Database User - New		
Select a page	🛒 Script 👻 🛐 Help	
🚰 General 🚰 Securables		
🚰 Extended Properties	User name:	BUILTIN (Users
	• Login name:	BUILTIN\Users
	C Certificate name:	
	C Key name:	
	C <u>W</u> ithout login	
	<u>D</u> efault schema:	
	Schemas <u>o</u> wned by this user:	
	Owned Schemas	
	db_accessadmin	
	db_backupoperator	
	🗖 db_datareader	
	🔲 db_datawriter	
	🔲 🗖 db_ddladmin	
	🔲 🔲 db_denydatareader	
Connection	db_denydatawriter	<b>_</b>
Server: WINV64BK0D6B94\SIMSERVE	Database role <u>m</u> embership:	
	Role Members	<u> </u>
VIN-V6ABK0DGB94\Administrate	db_accessadmin	
	db_backupoperator	
Mew connection properties	db_datareader	
Program	db_datawriter	
riogiess	🗖 db_ddladmin	
Ready	db_denydatareader	
	db_denydatawriter	<b>_</b>
		OK Cancel

24. Double click on "NT AUTHORITY\IUSR". From the second checkbox list (Database role membership), select db\_datareader and press OK

😫 New Query   🛅   🕞   🚰 🛃 🍏   🌌 🥃 👘	🧾 Database User - NT AUTHO	RITY\IUSR	
■ 提 Execute	:e 🕨 🔳 Select a page	🛒 Script 👻 🛐 Help	
Object Explorer - 4 × Connect - 🛃 🛃 🔳 🍸 🛃	SQL Securables	User name:	NT AUTHORITYVUSR
Storage     Security     Security     Security     Users     dbo     guest     II5     INFORMATION_SCHEMA     LocalSystem     Symetric Keys     Schemas     Schemas     Schemas     Symetric Keys     Stmdb30Audit     Database Diagrams     Tables     Views     Synonyms     Programmability     Service Broker     Storage     Security     Users     dbo     guest     IIS     IIS     IIS     INFORMATION_SCHEMA     LocalSystem     Security     Users     dbo     guest     IIS     INFORMATION_SCHEMA     LocalSystem     NT AUTHORITY[IUSR     LocalSystem     NT AUTHORITY[IUSR     Sys	Connection Cometion Cometion Cometion Cometion VIN-V6ABK0DGR94\SIMSERVE Connection: WIN-V6ABK0DGR94\Administrat View connection properties Progress Ready	<ul> <li>Login name: <ul> <li>Dertificate name:</li> <li>Key name:</li> <li>Without login</li> </ul> </li> <li>Default schema: <ul> <li>Schemas gwned by this user:</li> </ul> </li> <li>Owned Schemas <ul> <li>db_accessadmin</li> <li>db_ackupoperator</li> <li>db_datareader</li> <li>db_datareader</li> <li>db_denydatareader</li> <li>db_accessadmin</li> <li>db_accessadmin</li> <li>db_accessadmin</li> <li>db_datareader</li> <li>db_datareader</li> <li>db_datareader</li> <li>db_accessadmin</li> <li>db_backupoperator</li> </ul> </li> </ul>	
🕀 🧰 Roles 🕀 🧰 Schemas			UK Cancel

- 25. Repeat the previous 2 steps for "SIMdb30Audit" database.
- 26. Right Click on SIMdb30Audit database and click on Properties. Then click on Permission and then select "BUILTIN\Users". From the list of checkboxes, scroll down to "Execute" and check the Grant checkbox and press OK.

K Microsoft SQL Server Mana	agement Studio								
<u> </u>	<u>[</u> ools <u>W</u> indow <u>C</u> omm	unity H	Help						
🛛 🔔 New Query 🛛 🛅 🛛 🕞 🖉	j 🖬 🍙 🔤 💂		Database Properties - SIMd	b30Audit					
Object Explorer			Select a page	🛒 Script 👻 📑 Help					
Connect 🕶 📑 📑 👕 🔽	3 🔊		General						
E 🐻 WIN-V6ABK0DGR94\SIMS	ERVERDV3 (SQL Server 1	0.50.255	I Files	Server name:	WIN-V6AB	KODGR94\SIMS	ERVERDV3		
Databases Image: Ima	c .		Poptions	View server permissions					
⊕ ReportServer\$SIN	- MSERVERDV3		Change Tracking	Database <u>n</u> ame:	SIMdb30A	udit			_
⊞ EportServer\$SIN	MSERVERDV3TempDB		Extended Properties	Lisers or roles:				Searc	h
SIMdb30Audir				Name			T		
🛨 🚞 Database	New Database							rpo Iser	·
Tables     Tables     Tables	New Query			🛓 IIS				lser	
E D Synonym	Script Database as	•		👃 LocalSystem			L	lser	
🕀 🧰 Programn	Tasks			A NT AUTHORITY N	USR		L	iser	
+ j Storage	Policies								
🖃 🧰 Security	Facets								
🗆 🧰 Users	Start DowerShell								
9	Reports	•	o	Permissions for BUILTIN\	Users:				
n 👸	Rename		Lonnection	Explicit Effective					
<u>Š</u> y	Delete		Server: WIN-V6ABK0DGR94\SIMSERVE	Permission	Grantor	Grant	With Grant	Deny	
N	Refresh		Connection:	Create XML schem	dbo				
🕀 🧰 Roles	Properties		WIN-V6ABK0DGR94VAdministratc	Delete	dbo				
🕀 🧰 Scherhas	ris Kous		View connection properties	Execute	dbo				
	BS			References	dbo				-
🕀 🛄 Symmetric	: Keys		Progress	Select	dbo				
			Ready	Show plan	dbo				
			-4 p.	Subscribe query not	dbo				
🕀 🚞 Management								-	
							OK	Cance	*
4									
1									

27. Now, anyone can access the reporting system with the newly created username and password through the <a href="http://<IPADDRESS>/Reports">http://<IPADDRESS>/Reports</a> link.

## **5.0 Adding External Reports to the Server**

External reports may be added to regularly to Simavita's training resource website (<u>http://simavita.com/training/</u>). Once these external report templates are downloaded, these need to be added to the server so that they become available for all users via a web-based interface. The addition of these reports can be achieved via a client computer through the interface described in preceding sections. Alternatively the files can be added directly to the server.

#### 5.1 ADDING REPORTS FROM CLIENT COMPUTERS

The procedure below describes how to add new external reports to the system from a client computer.

1. On a client computer open Internet Explorer and enter the http://[SIM Server IP]/Reports (for example: http://192.168.0.161/Reports) into the Address Bar and press Enter. The following pop up window will appear for login:

Chttp://192.168.0.161/Reports/ - Windows Internet Explorer	
ⓒ ♥ Ø http://192.168.0.161/Reports/ ♀	₼ ☆ 🕸
Windows Security	
User name Password Domain: WIN-V6ABK0DGR94	
OK	

2. Enter the login credentials for an administrator for SIM<sup>™</sup> server. SQL Server Reporting Services page will be displayed.

CHome - Report Manager - Windows Internet Explorer	
🚱 💿 🗢 🌈 http://192.168.0.161/Reports, 🔎 🗾 🗟 🐓 🌈 Home - Report Manager	× ि ★ 🔅
	Home   Site Settings   Help
SQL Server Reporting Services Home	Search
📸 New Folder 🛛 🧕 New Data Source 🔰 🗹 Folder Settings 🔰 🏦 Upload File 📗 Details View	
There are no items in Home. Click Help for more information about this page.	
	×

- If there is a red message saying "This page might not function correctly because either your browser does not support scripts or active scripting is disabled", then follow the instruction provided on this link "http://www.mytechmantra.com/LearnSQLServer/Troubleshooting-SQL-Server-Reporting-Service-<u>Error.html</u>" to enable active scripting for the browser.
- 4. To Add the External Reports to Reporting Services for web access, click on the "Upload File" (highlighted in red in Step 2). In the subsequently displayed screen, click the Browse button which will pop up a File Browser window. Go to the folder where the new report file was downloaded and select the report and press Open and then OK in the Upload File page.
- 5. Now the report will show in the SQL Server Reporting Services Homepage.
- 6. Now any user on client machines can go to address (http://<IPADDRESS>/Reports) in Internet Explorer and view the reports with the login credentials

### 5.1 ADDING REPORTS DIRECTLY ON SERVER

External report template files can be added directly to the server by following these steps:

- 1. Log into the server through the standard Windows login
- On the SIM<sup>™</sup>'s Desktop you will see a folder named "External Report Templates". This folder is automatically created during SIM<sup>™</sup> installation. If this folder does not exist and SIM<sup>™</sup> has been installed, you can create this folder manually.
- 3. Download template files from Simavita's training website.
- 4. Copy the downloaded files into "External Report Templates" folder on the desktop.

This section describes the process of configuring the server (running the SIM<sup>™</sup> software and SQL database) to allow client computers running SQL Report Builder remote database access. This is useful for accessing full report editing and reporting.

The following sections describe the changes needed on the server. The subsequent section describes how to change the connection strings in the template reports so that these point to the (now) remote SIM<sup>™</sup> system server.

#### **6.1 SERVER SETTINGS**

- 1. By default, SQL Server does not accept remote connections. To enable remote connections, following steps have to be taken on the SIM<sup>™</sup> software server.
- 2. Open SQL Server Configuration Manager.

Programs (6)	
SQL Server Management Studio	
SQL Server Business Intelligence Development Studio	
SQL Server Configuration Manager	
SQL Server Error apd.Llsage.Reporting Location: mmc (C:\Windows\SysWOW64) SQL Server Installation Center (64-bit)	
髋 SQL Server Installation Center (64-bit)	
$\wp$ See more results	
SQL Server Log off	
🌆 Start 🛛 🏭 🔁 🚝 🧔	

3. Expand SQL Server Network Configuration and click on Protocols for SIMSERVERDV3. Right click on TCP/IP at the right window and Enable.



4. After enabling TCP/IP, right click again and click on Properties. In the Properties window go to second tab "IP Addresses". In the "IP All" section enter the TCP Port as 1433 and press OK.

Image: Shared Memory     Enabled       Image: Named Pipes     Disabled       Image: Shared Memory     Enable       Image: Shared Memory     Enable	TCD / TD Droportion	
VIA Disable Sabled		
VIA Disable sabled	TCD/ID Droportion	
	Protocol IP Addresses	? ×
Properties		
Hale	Active	Vec
Нер	Enabled	No
	IP Address	127.0.0.1
	TCP Dynamic Ports	0
	TCP Port	
	IP5	
	Active	Yes
	Enabled	No
	IP Address	fe80::5efe:192.168.0.161%12
	TCP Dynamic Ports	0
	TCP Port	
	IPAII	
	TCP Dynamic Ports	49923
	TCP Port	1433
	TCP Port	
	TCP port	
	ОК	Cancel Apply Help

5. Open to SQL Server Management Studio:

Programs (2)	
SQL Server Management Studio	
SQL Server Configuration Manager	Location: Ssms (C:\Program Files (x86)\Microsoft SQL Server\100\Tools\Binn\ VSShell\Common7\IDE)
>> See more results	
SQL Server Man Log off	
🎊 Start 🛛 🏭 🗾 🚞 🧔	

6. Press connect in the "Connect to Server" window:

Jeff Connect to Server	·	×
Microsoft*	<b>Server</b> <sup>*</sup> 2008 R2	
Server <u>type</u> :	Database Engine 💌	]
<u>S</u> erver name:	WIN-V6ABK0DGR94\SIMSERVERDV3	]
Authentication:	Windows Authentication	]
<u>U</u> ser name:	WIN-V6ABK0DGR94\Administrator	]
Password:		
	Remember password	
		-
<u> </u>	Caricei Help <u>Uptions &gt;&gt;</u>	

7. In the Tree View expand Security -> Logins. Right Click on Logins and Click "New Login"



- 8. In the popup window, perform the following actions:
  - i) Enter a login name (for example: "report")
  - ii) Check SQL Server authentication
  - iii) Enter and confirm the password
  - iv) Uncheck "Enforce password policy" (this depends on your password security preferences, for this example it is disabled)
  - v) Set the Default database to SIMdb30
  - vi) Then click on User Mapping from left menu titled "Select a page"
  - vii) In the User Mapping window, check SIMdb30 and SIMdb30Audit. Make sure in the bottom list public is selected.
  - viii) Press OK

🚪 Login - New					🚪 Login - New					_ 🗆 ×
Select a page	<u> S</u> cript 🗸 🚺 Help				Select a page	🔍 Script -	+ [ Help			
General Server Roles	Login name:	report	Sgarch		General Server Roles	Users ma	pped to this login:			
Securables	O Windows authentication				Securables	Map	Database	User	Default Schema	
🔄 🔄 Status	SBL Server authentication				🚰 Status		master			
	Password						model			
	_dssmold.						msdb			
	Confirm password:	•••••					ReportServer\$SIMSER			
	Specify old password						HeportServer\$SIMSEH			
	Old password:						SIMdb30 SIMdb30Audit	report		
	Enforce password polic	y					temodb	report		
	Enforce password expir	ation					tompub			
	🔲 User must change pass	word at next login		>						
	C Mapped to certificate	<b></b>		-		1				
	C Mapped to asymmetric key					🗖 Gues	t account enabled for: SIMdbi	80.Audit		
	Map to Credential		Add			Databasi	e role membershin for: SIMdb3	0Audit		
Connection	Mapped Credentials	Credential Provider			Connection	db_a	ccessadmin			
Server:					Server:	db_b	ackupoperator storoodor			
WIN-V6ABK0DGH94\SIMSERVE					WIN-V6ABKUDGH94\SIMSERVE	dbd	atawriter			
Connection: WIN-V668K0DGB94\6dministrate					Connection: WIN//SARK/ID/GR94\Administrate	dbd	dladmin			
View connection properties					View conception properties	do_d	enydatareader enydatawriter			
view connection properties					Wew connection properties	dbo	wner			
Progress			Remove		Progress	☐ db_s	ecurityadmin			
Ready	Default database:	SIMdb30			Ready					
1945 F	Default language:	<default></default>			201					
L										
		OK	Cancel						OK	Cancel

9. Expand the Tree View on the left to Databases -> SIMdb30 -> Security -> Users. Right click on the user you created (in this example 'report') and click Properties. In the pop-up window, check db\_datareader from the second list and press OK. Repeat the same step for SIMdb30Audit database.

File Edit View Debug To	ols Window Community	y Help		
😫 🔔 New Query   🛅   📑   💕	u a 🗠	🚺 Database User - report		
Object Explorer	<b>-</b> ₽ ×	Select a page	🛒 Script 👻 📑 Help	
Connect 🕶 📑 📑 🛒 💽	<u>s</u>	General		
Connect  WIN-V6ABKODGR94(SIMSEF Databases Databases Databases Databases Databases Databases Database Diagn Data	VERDV3 (SQL Server ERVERDV3 ERVERDV3 ams I(Users IATION_SCHEMA	Connection	User name: C Login name: C Certificate name: C Key name: Without login Default schema: Schemas owned by this user: Owned Schemas db_accessadmin db_backupoperator db_datawriter db_datawriter db_deladmin db_derydatawriter	report
Cocally     Cocally     Sys     Cocally     Sys     Schemas	stem HORITY/IUSR New User Script User as Policies Facets Start PowerShell Reports Rename Delete Refresh	Server: WIN-V6ABK0DGR94\SIMSERVE Connection: WIN-V6ABK0DGR94\Administrature WIN-V6ABK0DGR94\Administrature Wiew connection properties View connection properties Progress Ready	Database role membership: Role Members db_accessadmin db_backupoperator db_datareader db_datawriter db_datawriter db_derydatareader db_derydatareader	OK Cancel
Ready	Properties			

10. Right click on the server (start of the Tree View in the left panel) and select Properties. In the pop up window, select Security from the left menu (titled 'Select a page'). Check "SQL Server and Window

Authentication mode" and then click OK.



 Right Click on SIMdb30Audit and click on Properties. On the pop-up window, select Permission from the left "Select a page" options. Then select the user you created and in the bottom grid, scroll down to "Execute" and check the checkbox under Grant column and press OK.

Microsoft SQL Server Mana	agement Studio								
File Edit View Debug T	ools Window Community H	elp							
😫 🔔 New Query 🛛 🛅 📑 🖾	; 🖬 👍 🔤 💂								
Object Explorer	- ₽ ×	📑 Database Properties - SIMd	b30Audit					_ 🗆 ×	
Connect 🕶 📑 📑 🝸 🙋	3 🔊 🕹	Select a page Script + 📑 Help							
🖃 🚺 WIN-V6ABK0DGR94\SIMS	ERVERDV3 (SQL Server	General							
🖃 🚞 Databases		Elegroups	Files     Server name:     WIN-V6ABK0DGR94\SIMSERVERDV3						
H      System Databases     Fig. ReportServertSIN		Poptions	View server permissions						
ReportServer\$SIN		🚰 Change Tracking	Database name:	SIM4530A	ıdit				
E j SIMdb30			D'atabase <u>n</u> ame.	Johnaboana	Joimabouradia				
🗉 间 SIMdb30Audil	New Database	Extended Properties	Users or roles:				S <u>e</u> ar	sh	
🕀 🧰 Database	New Database		Name			T	уре		
	New Query		🐣 BUILTIN\Users			ι	lser		
E D Synonym:	Script Database as 🕨		📥 IIS			L	lser		
🕀 🚞 Programm	Tasks 🕨		Å LocalSystem			l	lser		
🕀 🧰 Service Bi	Deltain a		💧 🔠 NT AUTHORITYV	l	lser				
🕂 🛄 Storage	Policies		🐣 report			ι	lser		
E Decarty	Facets								
🤼 В	Start PowerShell								
🤷 d	Deports h								
	Reports F								
	Rename		Permissions for report:						
<u>š</u> i	Delete	Lonnection	Explicit Effective						
N	Refresh	WIN-V6ABK0DGR94\SIMSERVE	Permission	Grantor	Grant	With Grant	Deny		
5 S	Properties	Connection:	Create type	dbo					
🕀 🧰 Roles		WIN-V6ABK0DGR94\Administrate	Create view	dbo					
🕀 🚞 Schemas		Jew connection properties	Create XML schem	dbo					
🛨 🧾 Asymmetr	ic Keys		Delete	dbo					
	:Kevs	Progress	Execute	dbo					
E D Security		Beady	Insert	dbo					
🕀 🚞 Server Objects	References	dbo							
Replication			Select	dbo					
🛨 🛄 Management							_		
						OK	Cano	sel (	
4								- ///	

12. Go back to SQL Server Configuration manager (step 2). Select "SQL Server Services". In the right panel, select SQL Server (SIMSERVERDV3), right click and press Restart.

🚟 Sql Server Configuration Manager				, <u> </u>	
File Action View Help					
🗢 🔿   🙇   📓 🗟   🚺 🔍 🔍 📀					
😤 SQL Server Configuration Manager (Local)	Name	State	Start	Mode	Log On As
SQL Server Services	SQL Server (SIMSERVERDV3)	Rupping	Autor	matic	NT AUTHORITY\N
. SQL Server Network Configuration (32bit)	SQL Full-text Filter Daemon Launcher (SIMS	Start	Manu	ial	NT AUTHORITY\LC
표 .쿻, SQL Native Client 10.0 Configuration (32bit)	SQL Server Reporting Services (SIMSERVER	Stop	Autor	matic	NT AUTHORITY\N
E J. SQL Server Network Configuration	SQL Server Agent (SIMSERVERDV3)	Pause	l Other	r (Boot, System	NT AUTHORITY\N
Protocols for SIMSERVERDV3	🙃 SQL Server Browser	Resume	l Other	r (Boot, System	NT AUTHORITY\LC
E 👷 SQL Native Client 10.0 Configuration		Restart			
		Properties			
		Help			

13. Open Windows Firewall with Advance Security

Kicrosoft SQL Server Management Studio
File Edit View Debug Tools Window Community Help
🔛 New Query 🕞 🕞 🖙 🔚 🍊 📖 🥫
Object Explorer 🗸 🗣 🗙
Connect 🕶 🛃 🔳 🝸 🛃
King States Control (SQL Server 10.50.2550 - re     Databases
E Example 2 Example
🖃 🥚 SIMdb30 🕀 🥅 Database Diagrams
The second sec
æ views
Programs (1)
👹 Windows Firewall with Advanced Security
Control Panel (4)
Windows Firewall
🔐 Allow a program through Windows Firewall
🔐 Check firewall status
Y Check security status
O See more reculto
firewall Log off
Arstart 🛛 🛃 🙋 🛄

14. In the "Windows Firewall with Advance Security" window, first click on "Inbound Rules", then from the right of the window (Actions) click "New Rule". In the pop-up window check the "Port" radio button and click the

Next button.



15. In the next page, enter 1433 for "Specific local ports:" and click Next

💣 New Inbound Rule Wizard	d X
Protocol and Ports	
Specify the protocols and ports t	o which this rule applies.
Steps:	
Rule Type	Does this rule apply to TCP or UDP?
Protocol and Ports	• ICP
Action	© <u>U</u> DP
Profile	
Name	Does this rule apply to all local ports or specific local ports?
	C All local ports
	Specific local ports: 1433
	Example: 80, 443, 5000-5010
	Learn more about protocol and ports

16. In next 2 pages, Press Next button. In the last page, in Name field enter "SQL Server" and click Finish.

17. Restart the SIM<sup>™</sup> system server.

### **6.2 CHANGING CONNECTION STRINGS**

To modify the reports from client computers, the client computers need to have Report Builder 3.0 (Microsoft SQL Server) or Microsoft SQL Server Reporting Services (SSRS) installed.

- Copy the report templates provided by Simavita (or available on the server) to the client machine. By default, the reports will be on the desktop on SIM<sup>™</sup> system server. The folder name is "External Report Templates".
- 2. Start the Report Builder 3.0 on the client computer.
- 3. From file menu, open any of the external reports.
- By default, the reports will not work as the reports are set up to access the database on same computer. Therefore, the connection string must now be changed in the report so that it connects to the SIM<sup>™</sup> system server database remotely (from the client machine).
- 5. Expand the Data Sources, right click on the data source and press "Data Source Properties"

	1 9 6	$\supset$		
9	Home	Insert	View	
Run	Paste	B I	Ţ UA → A	
Views	Clipboard		Font	5 Paragraph
Repor	t Data		×	· 1 · 2 · 3 ·
New	- Edit 🗙 👍			
+	Built-in Fields Parameters Images		· -	Audit Report Period: [@StartDate]
	Built-in Fields Parameters Images Data Sources		- I ·	Audit Report Period: [@StartDate] Changed On
	Built-in Fields Parameters Images Data Sources DS_SIMdbi Datasets	30Auc <sup>tte</sup>	Add Datase	Audit Report Period: [@StartDate] Changed On t
	Built-in Fields Parameters Images Data Sources DS_SIMdbi Datasets	30Auc". ×	Add Datase	Audit Report Period: [@StartDate] Changed On t
	Built-in Fields Parameters Images Data Sources DS_SIMdbi Datasets	30Auc <sup>1.</sup> ×	Add Datase Delete Data Source	Audit Report Period: [@StartDate] Changed On t e Properties

- 6. In the first pop-up window, click on the "Build" button.
- In the next pop-up window, change the server name from ".\SIMSERVERDV3" to "<SIMSERVERIP>,1433\SIMSERVERDV3" (see the screenshot below for an example).
- 8. Select the "Use SQL Server Authentication" radio button and enter the username and password created for enabling remote access to SIM Server. Check the "Save my password" option.

9. Press "Test Connection" which should say "Test connection succeeded". Then press OK.

Data Source Propertie	s	23	Connection Properties
General Credentials	Change name, type, and connection options. Name: DS_SIMdb30Audit Use a shared connection or report model Use a connection embedded in my report Select connection type:		Data gource:       Microsoft SQL Server (SqlOlient)       Qhange         Server name:       192.168.0.241,1433\SIMSERVERDV3       ▼         Log on to the server       ●       Use Windows Authentication         ● Use SQL Server Authentication       ↓         User name:       report         Password:       ●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●●
	Microsoft SQL Server Connection string: Data Source=.\SIMSERVERDV3;Initial Catalog=SIMdb30Audit Build	]	Connect to a database  Select or enter a <u>d</u> atabase name:  SIMdb 30Audt  Attach a database file:  Browse
Help	Use single transaction when processing the queries	iel	Logical name: Advanced Iest Connection OK Cancel

10. Now you can run or modify the report.

## 7.0 Using SQL Report Builder

This section provides an example of running an external report template as provided in the SIM<sup>™</sup> system software package or creating a new report. The information provided here should be considered a high-level introduction to running or creating reports. It is assumed that the user has significant prior knowledge of how to use SQL databases and develop SQL reports. Please refer to Microsoft's manuals and instructions for further details.

Different report examples and/or templates can be found at <a href="http://simavita.com/training/">http://simavita.com/training/</a>.

#### 7.1 EXISTING REPORTS

Once downloaded and installed as per the instruction provided in this document, these reports are directly accessible on the server by double clicking on the report files (\*.rdl files) and opening these reports via Report Builder. Alternatively the reports may be accessible from client computers depending on the setup. The steps described below assume that a report has been opened directly on the server.

- 1. Either double click the report template to be opened or open SQL Report Builder and select the file from Open file option from FILE menu. By default the report opens in the design view.
- 2. To view the report click the "Run" button, as shown below



3. Once the "Run" button is clicked, the parameter prompt will be displayed if parameters are needed for the report. Once the parameters are selected, the report can be viewed by clicking on "View Report" button:

	Dbservation List for Residentral - Microsoft SQL Server Report Builder _ E										= x
	Run										
Design	Q Zoom	First Previous of	Next Last	↔ Refresh ★ Stop → Back	Print Page Setup	Print Layout	Export	Document Map	A4		
Views	Zoom		Navigation		Print		Export	Options	Find		
Resider	t <select Select John Shi Jose Tes John Shi Jose Tes John Shi John Shi Paul Fis Fest Nier Jest Wei Jest Wei Jest Wei Jest Wei Jest Wei</select 	a Value> a Value> the lab backborn k = 12-Dec2002 uth = 11-410e/1935 http://dec2002 http://doc2002 http						100.000		View R	port

#### 7.2 CREATING A NEW REPORT

1. To create a new report, the user needs to open the SQL Report Builder and click on 'New' from the File Menu



2. The New Report wizard option will be shown as below

New Report or Dataset	40.2	
New Report Display data from various	Create a report from a wizard or from a blank report.	
data sources in tables, charts, and other formats.	Table or Matrix Wizard Guides you through choosing the data source connection, layout, and style for a table or matrix report.	e
New Dataset Share queried data among multiple reports.	Chart Wizard Guides you through creating column, line, pie, bar, and area charts.	
	Map Wizard     Displays report data against a geographical background.	
	Blank Report	

 Click on Table or Matrix Wizard, if tabular report is needed and Chart Wizard, if report with chart is needed. Once either of these are selected, the user will be prompted to select the dataset. Select "Create a dataset" before selecting "Next >". 4. In the next screen, click the "New" button to create a Data Source Connection.

New Table or Matrix			×
Choose a dataset			
Choose a dataset			
Choose an existing dataset in this report or a shared dataset			
Browse			
Help	< <u>B</u> ack	Next >	Cancel
New Table or Matrix			×
New Table or Matrix Choose a connection to a data source			x
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report.			×
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections:			x
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections:			×
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections:			×
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections:			X
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections:			X
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections: Browse		Tect	Connection
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections: Browse New		Test	Connection
New Table or Matrix Choose a connection to a data source Choose a published data source, or create a connection for use only in this report. Data Source Connections: Browse New		Test	Connection

- 5. In the Data Source Properties window, provide a name for the data source.
- 6. Click the "Build" to create the connection.
- 7. A pop up window for Connection Properties will be displayed. Enter ".\SIMSERVERDV3" for the Server name and select "SIMdb30" as the database and click OK (If used from client machine, then connection string has to include IP address of SIM<sup>™</sup> Server and 1433 port number as Server name and also username and password needs to be entered. See Section 0 part b for details).

8. On Data Source Properties window, the connection can be tested by clicking "Test Connection" button.

Data Source Properties	X	Connection Properties
Data Source Properties		Data source:
General	Change name, type, and connection options.	Microsoft SQL Server (SqlClient) Change
Credentials		Server name:
	Name:	.\SIMSERVERDV3 ▼ <u>H</u> efresh
	DS_TEST	Log on to the server
	Use a shared connection or report model	Output Use Windows Authentication
	Use a connection embedded in my report	Use SQL Server Authentication
	Select connection type:	User name:
	Microsoft SQL Server	Password:
	Connection string:	Save my password
	Click here to type or paste a connection string	Connect to a database
		Select or enter a database name:
	J×.	SIMdb30
		master
		model
	Test Connection	SamplePermits2
	Use single transaction when processing the queries	SIMdb 30
		tempdb
Help	OK Cancel	Advanced
		Test Connection OK Cancel
Row Gro	pups 🛄	

- If the connection test is successful, press the "Ok" button to return to "Choose a connection to data source" window. With the new connection selected, press "Next".
- 10. The "Design a query" window will be displayed. This window lists the Tables, Views, Stored Procedures and table-valued Functions of the selected database (SIMdb30). Pressing the "+" (plus) beside the Table will list all the tables available to select for the report.
- 11. Tables can be chosen for reporting by clicking the checkboxes beside the table names. If there are multiple tables selected the "Auto Detect" button must be clicked to ensure the relationships between the tables are properly selected. "Run Query" can be clicked to see if the data can be properly accessed. Click "Next >" to select the fields for the report.

Jesign a que	ry pecify the data you wan	it from the data :	source.									
	,,,,,											
🗇 <u>E</u> dit as Tex	t <i> Import</i>         Ru	un Query										
Database view			S-	lected fields				Gra	oup and Aggrega	ata 🗙		
	ClientDeserve		50	lielus				000	oup and Aggrege			
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	ClientSkinProblems			lientID					(1	none)		
• • • • • •	ClientStatus		c	lientGID					(1	none)		
	CognitiveSkillLevels			liantLIID						aana)		
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<u>•</u>	continenceriacapacity											
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If the user selects multiple tables without knowledge of the database structure, the system may cease to function correctly and the data in the reports may show incorrect data.

12. The selected fields need to be selected and arranged as required before going to Next layout window where the report layout can be selected.

New Table or Matrix					x
Arrange fields Arrange fields to group data in rows, col down the page in row groups. Use funct Available fields CreatedTimestamp PressureUcerRiskScoreID QuestionResponsibleID AbilityToUnderstandLeveID ClientUserID SkinConditionID CognitiveSkillLeveIs_CognitiveS CognitiveSkillLeveIGID Description IsDefault	umns, or both, and choo ions such as Sum, Avg, a	se values to display. Dat and Count on the fields i	a expands across the page n the Values box.	in column groups	and
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13. In the "Choose a style" window, different pre-defined styles can be selected. Once the selection is complete, click "Finish>>" to view the report.



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