

DEPLOYING SQL REPORTS FOR REDHORSE CRM

This article will walk you thru the process to deploy SQL Reports for RedHorse CRM.

Using SQL tools to deploy reports

SQL reports may be created using Visual Studio, Report Designer in Business Intelligence Development Studio or SQL Report Builder. These tools allow you to create and manage report definitions.

Once report definitions are created, these tools offer methods to deploy the reports to SQL Reporting Services. For more help with these tools, see Microsoft help.

Using CRM tools to deploy reports

SQL reports may also be deployed using a tool provided by CRM. This tool is called SQL.exe and is found in the directory where CRM is installed. Using standard settings for this tool, all reports found in the Templates directory will be deployed to SQL Reporting Services.

You may also prepare your reports and place them into a directory for deployment. In this case, only the reports found in the selected directory will be deployed rather than all reports in the Templates directory as described above. To use this option, run SQL.exe using the following command line parameter:

supportdir= path to your reports to deploy

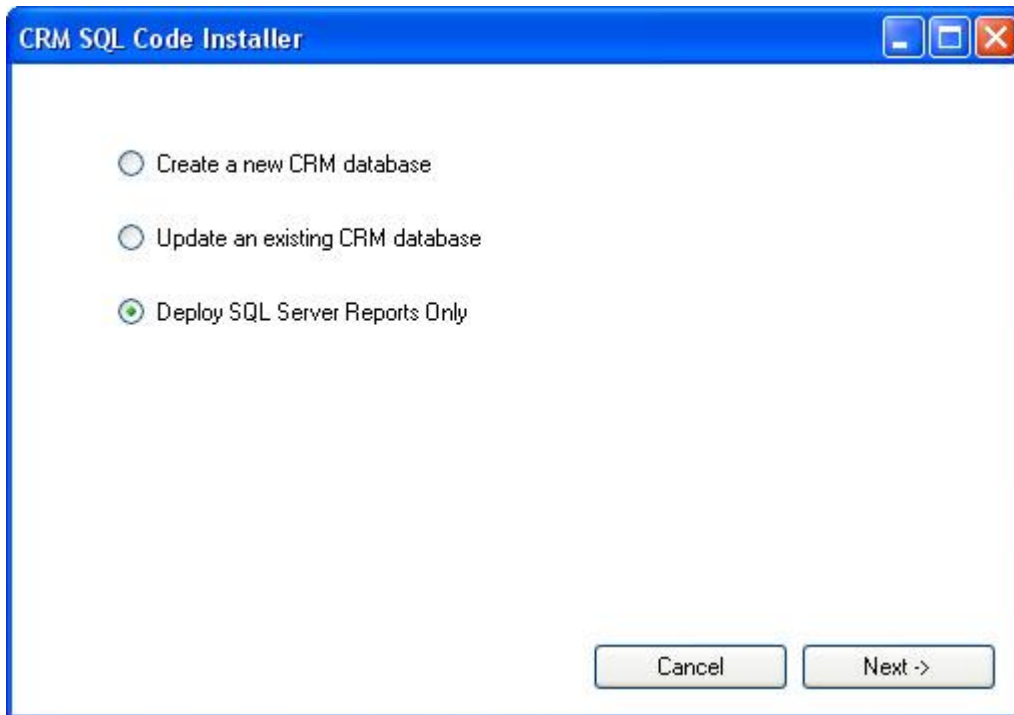
Example:

```
"C:\Program Files\RedHorse Systems\CRM\sql.exe" supportdir=C:\Reports
```

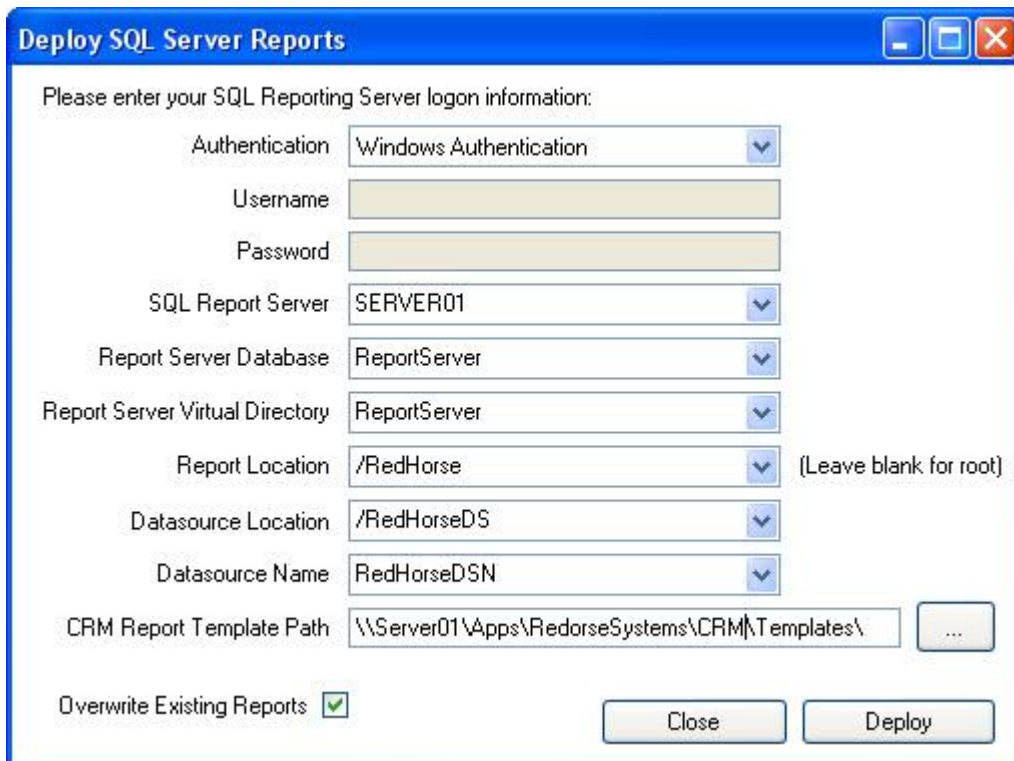
All reports found in the specified directory will be deployed to SQL Reporting Services. When the reports are deployed, data sources will be updated to match your CRM installation. This enables you to receive reports created by others, such as a reseller or consultant, and deploy them correctly in your environment with your data sources.

Running the SQL Code Installer

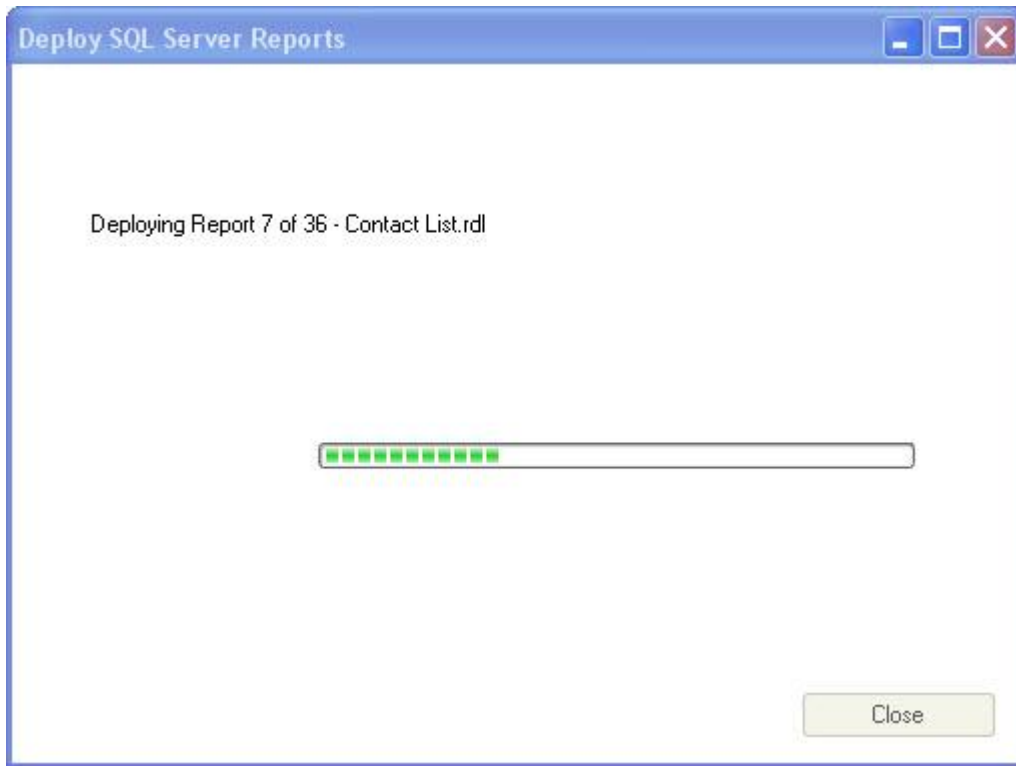
When the SQL Code installer is launched, select the option to Deploy SQL Reports.



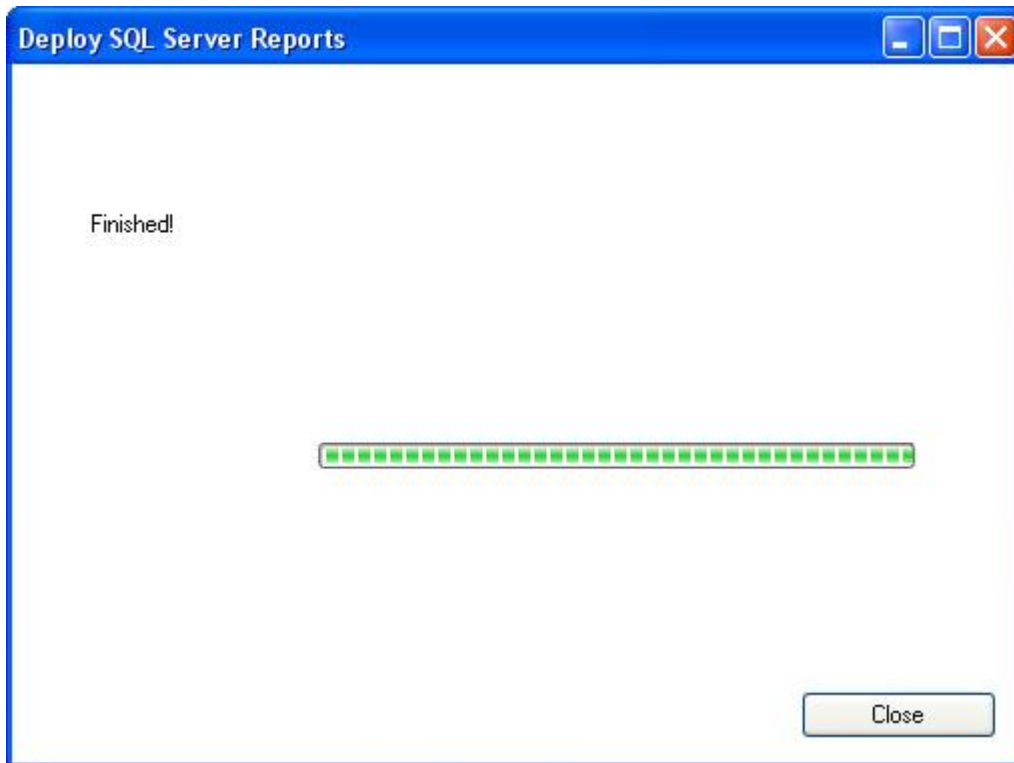
Enter SQL Reporting Services logon information. You may choose to overwrite existing reports if a match is found, or skip reports with a match. Click Deploy to begin.



When you choose to deploy, you will see progress as reports are deployed.



Click Close when the installer finishes.



Your reports will now be deployed to SQL Server Reporting Services. The datasources for the reports will be correctly mapped to your CRM installation database.

Importing Reports from SQL Reporting Services

All reports deployed to and found in SQL Reporting Services are not available in CRM. They are only available in CRM after they are imported from SQL Reporting Services. To import reports, open CRM and launch the Administration center. Use the Admin menu to select Reports, Import Reports. Please see the Administration Help file for CRM for assistance with importing reports.

Please contact support if you experience any issues during the deployment process.

support@redhorsesystems.com

www.redhorsesystems.com