Server-side printing

SYSPRO 7 Update 1

SYSPRO Technical Authoring

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Table of Contents

Server-side printing

SYSPRO Reporting Services enables you to produce professional, customized reports and documents. These reports and documents can be produced on the server, freeing up valuable resources on the client machine. The server manages the running and scheduling of reports and documents. Only a PDF viewer is required on the client (i.e. no run-time is needed).

How it works

1. When a report is requested from a client machine the request is added to a report queue (much like sending a document to a printer). The SRS service monitors the report queue and then processes the report according to the report preferences specified by the operator (e.g. should the report be emailed and printed).

2. Once the report is produced, a copy is stored on the server and is available for viewing when required. The report queue displays a list of all reports in the queue by operator, including the status of the report. Depending on the operator permissions, the report can be deleted, re-prioritized and re-run in the report queue.

3. Once the request for the report has been sent to the server from the client machine, the client can be disconnected from the server.

   The report will be produced and stored on the server and can be accessed from SYSPRO or other applications (e.g. SYSPRO Espresso).
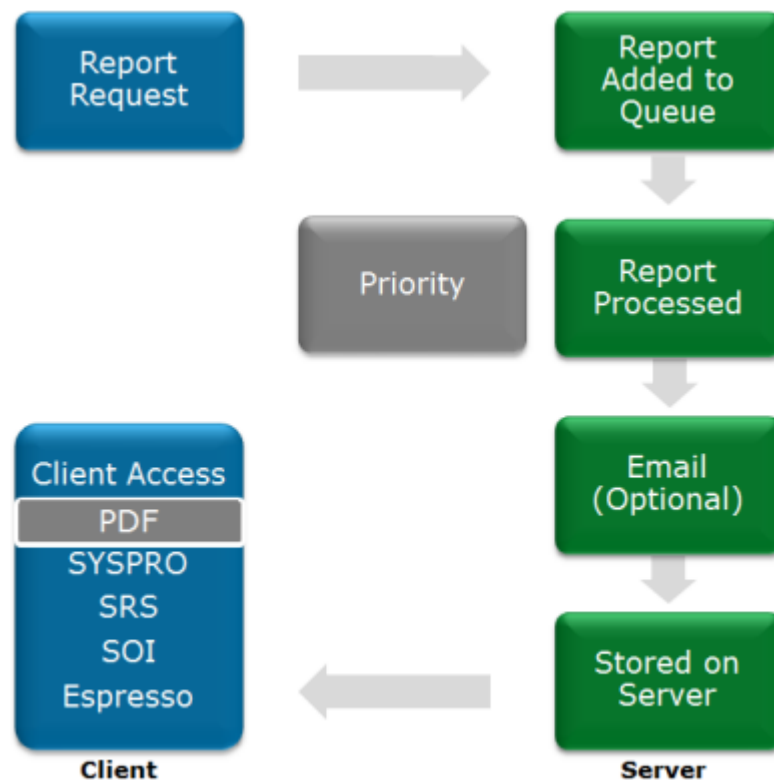
Get Started

Installation

Prerequisites	Installation notes and considerations
• Java 8 Update 66	
• Microsoft .NET Framework 4.0	
• Crystal Reports Server Embedded (CR 2013)	• This is used in conjunction with the SRS service for server-side printing (i.e. design reports on the client, but process the data on the server).
• SYSPRO Reporting Host service (CR 2013)	• This requires Crystal Reports Server Embedded 2013. Although server-side reporting uses the instance on the SYSPRO Application Server, you can configure a client instance on the reporting host service server that differs from the instance on the SYSPRO Application server. To do this, you need to un-comment the `SYSPROInstanceOnReportingServer` key in the `SYSPROReportingServiceHostService2013.exe.config` file and ensure that the value for the key is your SYSPRO client instance installed on the Report Server.
• SYSPRO e.net Communications Load Balancer (Optional)	• Required if the reporting server differs from the SYSPRO Application Server. It might already be installed.
• SRS service (Optional)	• Manages the reports sent from the client machines.

Implementation

The following describes the setup requirements to enable server-side printing. These steps will create a new operator (__SRS) that will be used for server-side reporting.

1. From the SYSPRO **System Setup** program, select the **Reporting** tab.
2. At the **Reporting configuration** field, select the **Server-side reporting using SQL** option.
3. At the **Database connection** and **Database authentication** fields, enter the required details.

   Use the **Test SQL connection** function to confirm that you can connect to SQL.
4. At the **Reporting service** field, indicate the reporting service address and port .

   Use the **Test connectivity** function to confirm that you can connect to the service.
5. At the **Scheduler authentication** fields, indicate the relevant credentials.

   These are the **Windows Task Scheduler** permissions that allow the operator to create and maintain schedules on the server.
6. Save your changes and restart the reporting host service.

   Log in with the new __SRS operator and load the company information.

Technical considerations

- When the SRS service is installed, it automatically creates two Report Application Services (RAS) that are used to produce reports and documents:
  - `DocumentPrintService` (on port 20131)
  - `ReportPrintService` (on port 20132)

You can change these settings using Crystal's Central Configuration Manager to update the relevant `.config` file.

- If you are printing directly from the server, you need to change the execution permissions of the SRS service.

    1. Create a user on the server with a password that doesn't expire and with permissions to logon as a service.
    2. Change the SRS service to use this user.
    3. Install the required printer using this user's profile.

Deploy & Use

Setting up SYSPRO server-side reporting

You need to define these setup options before using server-side reporting. This will create a new operator (`__SRS`) that will be used for server-side reporting.

1. From the **System Setup** program **Program List** > **Administration** > **General Setup** > **System Setup** select the **Reporting** tab.
2. Select the **Server-side reporting using SQL** option at the **Reporting configuration** field.
3. Enter the database connection and database authentication details.

   Select **Test SQL connection** to ensure you can connect to SQL.

4. Enter the reporting service address and port at the **Reporting service** field

   Select **Test connectivity** to ensure you can connect to the service.

5. Enter the scheduler authentication user name and password.

   These are the **Windows Task Scheduler** permissions that allow the operator to create and maintain schedules on the server.

6. Save your changes.
7. Restart the reporting host service to log in with the new __SRS operator and load the company information.

Enabling operator server-side printing activities

You would typically follow this procedure if you need to delete and prioritize reports in the report queue.

1. From the **Operator Setup** program **SYSPRO Ribbon bar** > **Setup** > **Operators** highlight the operator against whom you want to configure SRS permissions and select **Change** from the **Edit** menu.
2. Select the **Security** tab.
3. From within the **Activities** group, select **List** at the **Selection** field and then **Edit** at the **Configure Activities** field.
4. Locate the Reporting Service module and enable the **SRS Allowed to change report priority** and **SRS Allowed to purge report** options.
5. Save your changes.

Setting up the server email address

Because Microsoft Outlook is not used to email reports from the server, you need to enable SMTP to use the mail server to email reports.

1. From the **Company Maintenance** program **SYSPRO Ribbon bar** > **Setup** > **General Setup** > **Company Maintenance** highlight the company you want to maintain and select **Change**.
2. From the **General** tab, enter the default IP address of the specific SMTP server that SYSPRO will use to send messages.
3. Enter the email address of the sender of the message.
4. Enter the user name and password for the email account and the SMTP server port to be used.
5. Save your changes.

Changing the default service timer

You would typically follow this procedure to change the frequency at to which reports are processed on the server and appear in the report queue.

1. Open the `SYSPROReportingServiceHostService.exe.config` file in your preferred text editor and change the service refresh time.

   By default the file is located in the `Program Files\SYSPRO` folder and the default refresh time is 1 minute (0.00: 01:00).

2. Save your changes and restart the service.

Printing a report using SRS server-side printing

1. Select the report to be printed from the client.
2. Define the report and output options you require.

   Ensure that the printer you have selected is on the server. This would typically be set up by an administrator.

3. Select **Process** and confirm that the report has been added to the report queue and moved to the server.
4. Open the **Report Queue** program **SYSPRO Ribbon bar** > **Home** > **Report Queue**.

   A list of all the reports are displayed in the report queue. The refresh time as defined in the `SYSPROReportingServiceHostService.exe.config` file indicates how often the list view is updated.

5. Select **View report** against the report you want to print.
6. Print the report.

Deleting a report from the report queue

- Ensure that you have enabled the operator activity: **SRS Allowed to purge report**.

You can delete a report from the report queue list view if it has been printed.

1. From the **Report Queue** program **SYSPRO Ribbon bar** > **Home** > **Report Queue** highlight the report you want to delete.
2. Select **Delete** from the toolbar.

Changing report priorities

- Ensure that you have enabled the operator activity: **SRS Allowed to change report priority**.

You can change the priority of any report in a status of **In Queue**. If a report is urgent and there are many reports in the queue, you can change the priority of the report to move it to the front of the report queue.

1. From the **Report Queue** program **SYSPRO Ribbon bar** > **Home** > **Report Queue** click in the **Priority** column of the report you want to maintain.
2. Select the relevant priority.

   You can select Low, Medium or High. The server will then re-prioritize the list view based on the priority (e.g. high priority reports will appear and be processed first, followed by medium and low reports).

Re-running a report

You would typically follow this procedure to resolve an error against a report and print it again from the report queue without re-processing it from the client.

From the **Report Queue** program **SYSPRO Ribbon bar** > **Home** > **Report Queue** highlight the report you want to re-run, and the select **Re-run report**.

The **Re-run report** option is only enabled if there is an error against the report.

Exporting a report

You can export a report and save it on the server in the chosen exported format.

1. Select the report to be exported from the client.
2. Define the report options required
3. Select the **Output options** tab and enable the **Export report** option.
4. Select the format to which the report must be exported and select **Process**.
5. Open the **Report Queue** program **SYSPRO Ribbon bar** > **Home** > **Report Queue**.
6. Select **View** in the **Exported report** column against the relevant report.

The report opens in the application to which you chose to export it.

Appendix

Additional resources

Reference Guides

SYSPRO's Reference Guides are primarily module-based and cover aspects of the user interface at program level. This includes detailed field and function explanations as well as notes and warnings regarding the usage of an application program within SYSPRO. These guides also extend to feature topics within the system (e.g. Tax, Security, Language Translation, etc.) and include implementation considerations. Please refer to the SYSPRO *InfoZone* for details on how to obtain these guides (`http://infozone.syspro.com/support`).

Support

SYSPRO's *InfoZone* provides up-to-date information about the product as well as more advanced tutorials for registered users.

Newsletter

As part of SYSPRO's ongoing commitment to keeping you informed about the latest product developments, a regular newsletter is distributed to the SYSPRO community. The newsletter covers many aspects of SYSPRO ranging from product enhancements to support-related information, known issues and useful tips. You can subscribe to this newsletter from the SYSPRO *InfoZone*.

Forums

SYSPRO provides a number of active on-line *forums* for you to engage in various discussions about the product.

Contact us
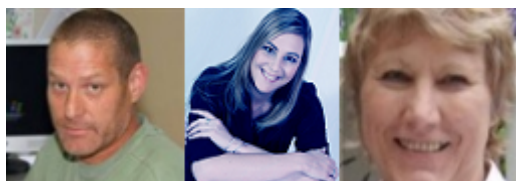
The Technical Authoring team comprises: Even Nesset, Carol Hart and Monique MacNaught. Send us your comments to help us improve the standard of our reference guides.

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