Support:

Australia: 1300 260 795 (Local call cost in Australia)
Email: support-anz@oclc.org
Amlib Help Desk (TOPDesk):
https://oclc.topdesk.net/tas/public/login/form

OCLC Amlib Support Documentation:
https://www.oclc.org/support/services/amlib.en.html

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Email: Australia@oclc.org

www.oclc.org/en-AU/
Table of Contents

WELCOME ................................................................................................................................. 4

OVERVIEW ................................................................................................................................. 4

BEFORE YOU BEGIN THE INSTALLATION .............................................................................. 4

Read the Installation Notes First ............................................................................................. 4

Serial Numbers Required for Installation of Amlib Modules ..................................................... 4

OPENReports SUPPORTED OPERATING SYSTEMS & SYSTEM REQUIREMENTS ......................... 5

SECTION 1: Pre Requisites ....................................................................................................... 6

SECTION 2: INSTALL OpenReports ............................................................................................ 6

Install OCLC OpenReports ........................................................................................................ 6

SECTION 3: configure Database connection ............................................................................... 7

SQL Databases Customers ........................................................................................................ 7

Oracle Database customers: .................................................................................................. 10

Accessing the OpenReports page ........................................................................................... 11

APPENDIX A: Installation of Required .NET Components ....................................................... 12

APPENDIX B: Installation/Configuration of IIS........................................................................ 13

Install IIS with .NET support on Windows Server 2012 ............................................................ 13

Install IIS with .NET support on Windows Server 2008 or 2008 R2 ........................................... 14

Install IIS with .NET support on Windows 7 and Windows Vista ............................................... 14

APPENDIX c: Troubleshooting .................................................................................................. 15

Issue 1: Database name Error .................................................................................................. 15

Issue 2: Authorisation Service Connection Error .................................................................... 16

Issue 3: Error while trying to connect to Authorisation Service: Credentials are invalid. ............ 17
**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](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](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.
<table>
<thead>
<tr>
<th>Supported Operating Systems &amp; System Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating System</strong></td>
</tr>
<tr>
<td>• Windows 7, Windows 8, Windows 10</td>
</tr>
<tr>
<td><strong>.Net Framework</strong></td>
</tr>
<tr>
<td>• 4.0 or later including Web Server (IIS) Support and HTTP Activation</td>
</tr>
<tr>
<td><strong>IIS</strong></td>
</tr>
<tr>
<td>• 6.0 or later with ASP.net support installed</td>
</tr>
<tr>
<td><strong>Java runtime</strong></td>
</tr>
<tr>
<td>• 6.0 or later</td>
</tr>
<tr>
<td><strong>Memory (RAM)</strong></td>
</tr>
<tr>
<td>• Minimum 4GB</td>
</tr>
<tr>
<td><strong>Browser</strong></td>
</tr>
<tr>
<td>• IE 10 or higher</td>
</tr>
<tr>
<td>• Chrome, Firefox, Opera</td>
</tr>
<tr>
<td><strong>JavaScript</strong></td>
</tr>
<tr>
<td>• Must be activated</td>
</tr>
<tr>
<td><strong>Cookies</strong></td>
</tr>
<tr>
<td>• Must be activated</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
</tbody>
</table>
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` 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

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**;

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

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

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

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:

![Connected successfully to the database](image)

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

![Database name is invalid](image)

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 as provided during Installation for example: http://localhost:85/
2. Login with your Amlib Username and Password
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:

```
[Installation Details]
```

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

```
[Installation Details]
```

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.
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**

![Database name is invalid](image)

**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

![Exception in Testconnection: ORA-12545: Connect failed because target host or object does not exist](image)

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

![Exception in Testconnection: ORA-12541: TNS:no listener](image)

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

![Exception in Testconnection: ORA-12514: TNS:listener does not currently know of service requested in connect descriptor](image)

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

![Exception in Testconnection: ORA-01017: invalid username/password; logon denied](image)
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.

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)