DVSAnalytics

Encore Database Installation Guide

Encore Workforce Optimization Solution
Version 8.0

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encore

For Dealer and Customer Use Only

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Getting Started

The purpose of this document is to provide detailed instructions for installing the Encore databases and reports.

The Encore system uses SQL Server for all data storage and uses Reporting Services for all reports. The installation assumes that one of the following versions of SQL Server is installed:

- SQL Server 2016 Standard or Enterprise edition with Reporting Services
- SQL Server 2014 Standard or Enterprise edition with Reporting Services
- SQL Server 2008 R2 Standard or Enterprise edition with Reporting Services

> **CAUTION** The Encore system does not support SQL Server versions older than 2008 R2.

If SQL Reporting Services has not been installed, refer to the Microsoft SQL documentation for steps to install Reporting Services on an existing SQL Server.

> **NOTE** To deploy the reports later in this guide, the Windows login that was used to log into the SQL Reporting Services server must be a member of the SQL Server Reporting Services System Administrator role. By default, any Windows user that is a member of the local Administrators group qualifies.

Unzip the **EncoreDatabaseInstallation.zip** file at the root of the C drive. Once unzipped, the following directories are present on the **C** drive:

- **C:\DeployReports** – This directory contains the files needed to install the Encore reports in SQL Reporting Services
- **C:\SQLScripts** – This directory contains the SQL scripts need to create and configure the Encore databases.

> **CAUTION** If the files were unzipped to **C:\EncoreDatabaseInstallation** directory, move the **DeployReports** and **SQLScripts** subdirectories to the root of the C drive.

If the Encore databases are already installed and only an upgrade is needed, skip the installation steps and execute the steps in "

Step 1 – SQL Server/SQL Instance Requirements

The following guidelines must be used when providing a SQL server for use with Encore.

Set the name for the SQL Server instance as follows:

- If building a SQL Server for Encore's exclusive use, the instance name should be set to MSSQLSERVER.
- If providing a SQL named instance for the Encore system, choose any instance name that fits your naming conventions. When using a SQL instance, the **SQL Browser Service** should be running to allow the Encore applications to use the named instance. Be sure to provide the DVSAnalytics installation technician with the instance name so the Encore software can be configured appropriately.

Verify the required installation options are appropriately configured:

- For SQL Server 2008 R2 refer to the "Appendix A: SQL Server 2008 R2" Options section on page 8.
- For SQL Server 20014 refer to the "Appendix B: SQL Server 20014" Options section on page 9.
- For SQL Server 20016 refer to the "Appendix C: SQL Server 20016" Options section on page 10.

Step 2 – Install Encore Databases

The steps in this section must be performed on a computer where SQL Server Management Studio is installed.

> **CAUTION**   If you encounter any script error, contact DVS Customer Support before continuing.

1. There are two Encore databases: Encore and EncoreAnalytics. Usually both databases are installed on the same SQL server. All SQL Scripts are located in **C:\SQLScripts**.

    a. Open **SQL Server Management Studio** and log in with the **sa** account.

    b. Execute the following SQL scripts for the Encore database in order shown.

    - **EncoreBuildScript.sql** – Creates the Encore database. Do not modify this SQL script.
    - **PromoteEncoreServertoSysadmin.sql** – Promotes EncoreServer to a Sys Admin. Do not modify this SQL script.
    - **EncoreSystemDatabaseObjectsScript.sql** – Adds additional tables and stored procedures for Encore server components. Do not modify this SQL script.
    - **EncoreUIObjectsScript.sql** – Adds additional tables and stored procedures for Encore UI components. Do not modify this SQL script.
    - **Set_SMTP_Settings.sql** – Inserts or modifies the email settings in the Encore database. Because the Encore system relies on the ability to sending emails, the settings starting with 'SMTP' must be populated for your corporate email server. If the UI needs to send emails to external addresses for post contact survey, the

external SMTP settings must also be specified. After running the script, you can verify the SMTP values, by running the script **Display_SMTP_Settings**.

- **Set_EIS_Address.sql** – Inserts or modifies the EIS address used by the UI. Replace 127.0.0.1 with the IPV4 address or server name that is hosting the Encore main components. If unsure, check with your DVS Project Manager. After running the script, you can verify the EIS address value, by running the script **Display_EIS_Address.sql**.

2. The following SQL script is optional for the Encore database depending on the desired configuration.

- **DisallowNonADAccountCreation.sql** – Encore can create two types of users:
  - The user is created with Encore credentials – the user's password is stored in the Encore database.
  - The user is created with Active Directory credentials – the user's password is not stored in the Encore database and the credentials are verified using Active Directory Authentication.

  Typically all accounts are created with Active Directory credentials with only one administrator user, 'Administrator', created with Encore credentials. If there is a security concern with using Encore credentials, run this SQL script to disable the ability to create users with Encore credentials. You will need to specify at least one user to be a member of the Encore administrators group. Once the Encore system is fully configured, the user 'Administrator' should be deleted.

3. Execute the following SQL scripts for the EncoreAnalytics database in order shown.

- **SQLSysAdminBuildScript.sql** – Creates the base EncoreAnalytics database. Do not modify this SQL script.
- **#EncoreAnalyticsBuiltScript.sql** – Adds additional tables and stored procedures to the EncoreAnalytics database. Do not modify this SQL script.
- **Set_Site.sql** – Inserts or modifies the site information. Your DVS Project Manager will provide you with the values for **@EDSFILE** and **@URL**. The remaining values should not be modified. After running the script, you can verify the site values, by running the script **Display_Site.sql**.

Step 3 – SQL Reporting Services Configuration

The most common configuration for SQL Report Services is to use a domain account as the execution account. This configuration provides the most flexibility and ease of maintenance.

The other method is to use a SQL Reporting Services data source which specifies a user account in the data source definition for each report. This method is rarely used because it isn't as flexible as the first method and requires more management. If you want to use this method, ask your DVS Project Manager for the user account and password needed in the data source definition. You need this information in a later step.

If there is already an execution account defined in SQL Reporting Services, this account is used for accessing the Encore reports. Note the account name, password, and the domain name, because this information is needed in a subsequent step.

Step 4 – Configure Windows Domain Account

Follow the steps below to create the Windows domain account to be used for browsing Encore reports. If a SQL Reporting Services execution account is already created, review the steps below and make any adjustments to the existing account as needed. This account is used to browse the reports regardless of Reporting Services configuration method used.

1. Create the following domain account:

Username:	EncoreReportViewer
Description:	Used by Encore for SQL Reporting Services
Password:	*V!ewR3ports*
Settings:	UNCHECK User must change password at next login
	CHECK User cannot change password
	CHECK Password never expires
	UNCHECK Account is disabled

2. Open **Server Manager**, navigate to **Local Users and Groups** and then **Groups**, open the group **Users**, and add a new domain account using the format **domain\EncoreReportViewer.**
3. Give permission for the new account to log in locally to the SQL Reporting Services server. While there may be several ways to accomplish this, here is one recommended method:
   a. Run **gpedit.msc**, navigate to **Computer Configuration | Windows Settings | Security Settings | Local Policies | User Rights Assignment**.
   b. Double-click **Allow log on locally** and add the group **Users** if not in the list.

Step 5 – Deploy Reports

The deploy reports utility creates all the necessary SQL Reporting Service objects to successfully run reports. On the server where SQL Reporting Services is running, follow the steps below.

1. Right-click and edit **C:\DeployReports\EncoreReportSettings.cmd**. This command file contains three configuration settings that should be reviewed for needed modifications. If modifications are made, save the file.
2. Run **EncoreReportSettings.cmd**. If creating the reports for the first time, the utility prompts for the password of the Windows account used to browse reports.

> **NOTE**   Before running the command file, make sure no one is running reports or has Report Manager open. If Report Manager is open and you run the command file, it appears successful but it won't actually load any reports into Report Manager.

3. To verify the reports installed correctly, open the log file listed at the end of the installation. If errors occurred, contact DVS Customer Support.

The database installation is now complete.

Appendix A: SQL Server 2008 R2 Options

Verify the following options are installed:

- **Instance Features**
    - **Database Engine Services**
        - **SQL Server Replication**
        - **Full-Text Search**
    - **Reporting Services**
        - **Use Native Mode default configuration**
- **Shared Features**
    - **Business Intelligence Development Studio**
    - **Client Tools Connectivity**
    - **Client Tools Backwards Compatibility**
    - **Client Tools SDK**
    - **SQL Server Books Online**
    - **Management Tools – Basic**
        - **Management Tools – Complete**
- **SQL Server collation** must be set to **SQL_Latin1_General_CP1_CI_AS**
- The **Authentication Mode** must be set to **Mixed Mode** (SQL Server authentication and Windows authentication). The Encore applications and reports use SQL Server authentication to connect to the application databases.
- The TCP/IP protocol must be enabled.

You are now ready to process to "Step 2 – Install Encore Databases" on page 4.

Appendix B: SQL Server 2014 Options

Verify the following options are installed:

- **Instance Features**
  - **Database Engine Services**
    - **SQL Server Replication**
    - **Full-Text and Semantic Extractions for Search**
  - **Reporting Services – Native**
- **Shared Features**
  - **Client Tools Connectivity**
  - **Client Tools Backwards Compatibility**
  - **Documentation Components**
  - **Management Tools – Basic**
    - **Management Tools – Complete**
- **SQL Server collation** must be set to **SQL_Latin1_General_CP1_CI_AS**
- The **Authentication Mode** must be set to **Mixed Mode** (SQL Server authentication and Windows authentication). The Encore applications and reports use SQL Server authentication to connect to the application databases.
- The TCP/IP protocol must be enabled.

You are now ready to process to "Step 2 – Install Encore Databases" on page 4.

Appendix C: SQL Server 2016 Options

Verify the following options are installed:

- **Instance Features**
  - **Database Engine Services**
    - **SQL Server Replication**
    - **Full-Text and Semantic Extractions for Search**
  - **Reporting Services – Native**
- **Shared Features**
  - **Client Tools Connectivity**
  - **Client Tools Backwards Compatibility**
  - **Documentation Components**
- **SQL Server collation** must be set to **SQL_Latin1_General_CP1_CI_AS**
- The **Authentication Mode** must be set to **Mixed Mode** (SQL Server authentication and Windows authentication). The Encore applications and reports use SQL Server authentication to connect to the application databases.

The TCP/IP protocol must be enabled.

You are now ready to process to "Step 2 – Install Encore Databases" on page 4.

Appendix D: Upgrade Encore Databases

Typically, DVS Customer Service Technicians run any needed database and reports upgrades. If your security policy requires changes made to the databases and reports to only be performed by internal resources, follow the steps below.

Step 1 – Run Databases SQL Scripts

The steps in the document must be performed on a computer that has SQL Server Management Studio installed.

CAUTION If you encounter any script error, contact DVS customer support before continuing.

1. There are two Encore databases: Encore and EncoreAnalytics. Usually both databases are installed on the same SQL server. All SQL Scripts are located in **C:\SQLScripts**.

    c. Open **SQL Server Management Studio** and log in with the **sa** account.

    d. Execute the following SQL scripts for the Encore database in order shown.

        - **EncoreSystemDatabaseObjectsScript.sql** – Adds additional tables and stored procedures for Encore server components. Do not modify this SQL script.
        - **EncoreUIObjectsScript.sql** – Adds additional tables and stored procedures for Encore UI components. Do not modify this SQL script.

2. Execute the following SQL script for the EncoreAnalytics database in order shown.

        - **#EncoreAnalyticsBuiltScript.sql** – Adds additional tables and stored procedures to the EncoreAnalytics database. Do not modify this SQL script.

Step 2 – Update Reports

Proceed to the "Step 5 – Deploy Reports" section on page 6 to complete the upgrade.