

Minimum requirements for Portal (on-premise version):

- Windows Server 2012 R2
- Windows 10 (licensed) with the latest updates (64 bit only). All Windows applications must be licensed and activated.
- SQL Server 2008 R2 SP3
- .NET Framework 4.6.2
- Internet Information Services 8

Browser support:

- Chrome 48
- Internet Explorer 11
- Edge 20
- Firefox 44
- Safari 5
- Other*

*Most other web browsers that follow web standards should be compatible but is not officially supported. The portal is not designed for mobile phones and devices.

Minimum requirements Report Designer

Windows 7 or higher (32-bit or 64-bit) or Windows Server 2012 or higher.

Microsoft Office Excel 2010 or higher (32 or 64 bit).

Install OneStop Reporting Portal for on-premise system

Before you start, make sure you have this information available:

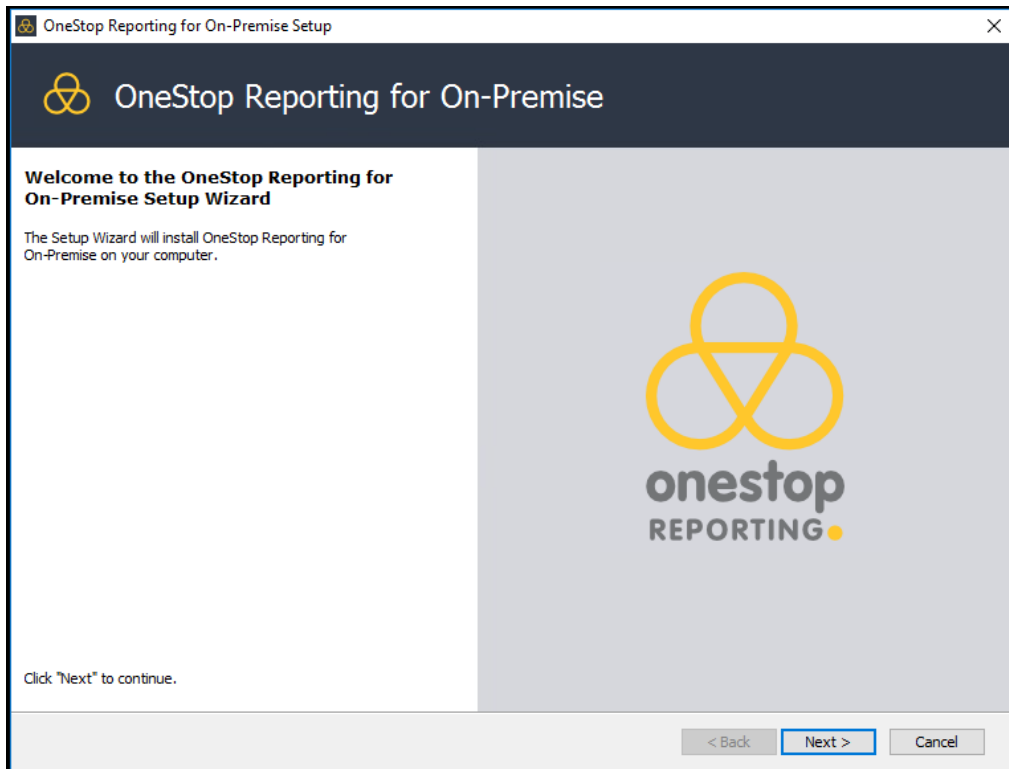
- Name of Microsoft SQL server.
- Location of the ERP database.
- SMTP settings (mail server):
 - o SMTP Host
 - o Port
 - o From email
 - o User name
 - o Password
- A (temporary) SQL-user with the "sysadmin" server role:
 - o User name
 - o Password
- Information regarding your OneStop Reporting administrator user (this will be your power user in OneStop Reporting):
 - o Full name
 - o Email
- Company Id/Name of the companies that are going to be used in OneStop Reporting.
- OneStop Reporting license key.

Steps:

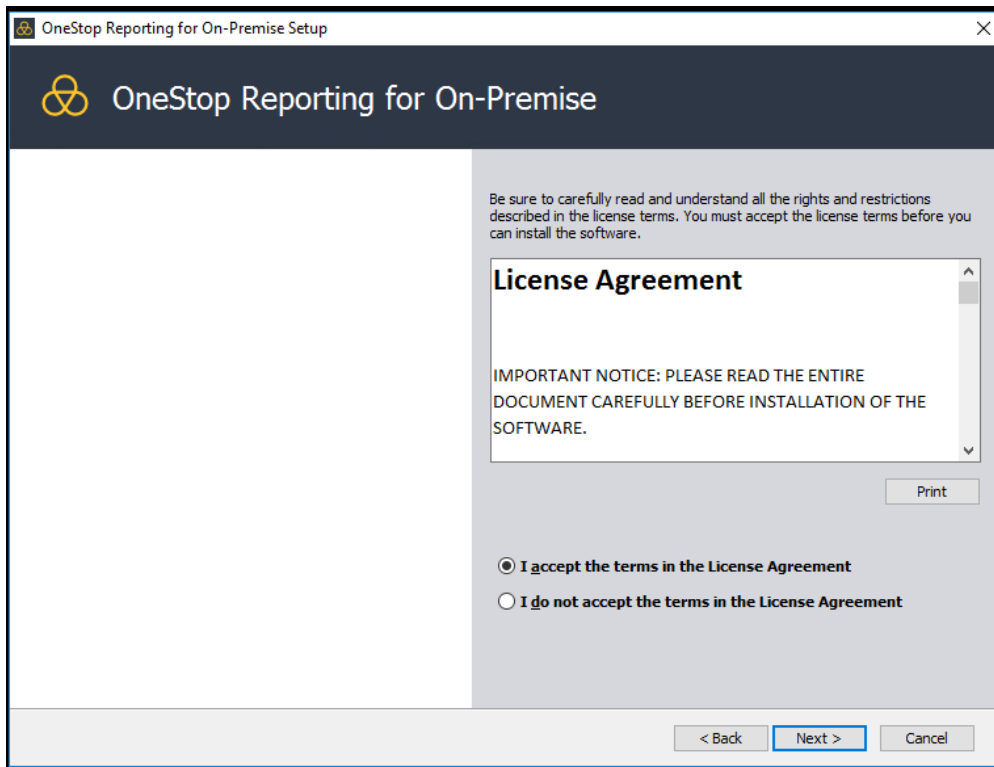
1. Double-click the installation file.

The **OneStop Reporting for On-Premise Setup** wizard opens.

2. Click **Next**.



3. Read the license agreement.
4. Click **I accept the terms in the License agreement**.
5. Click **Next**.

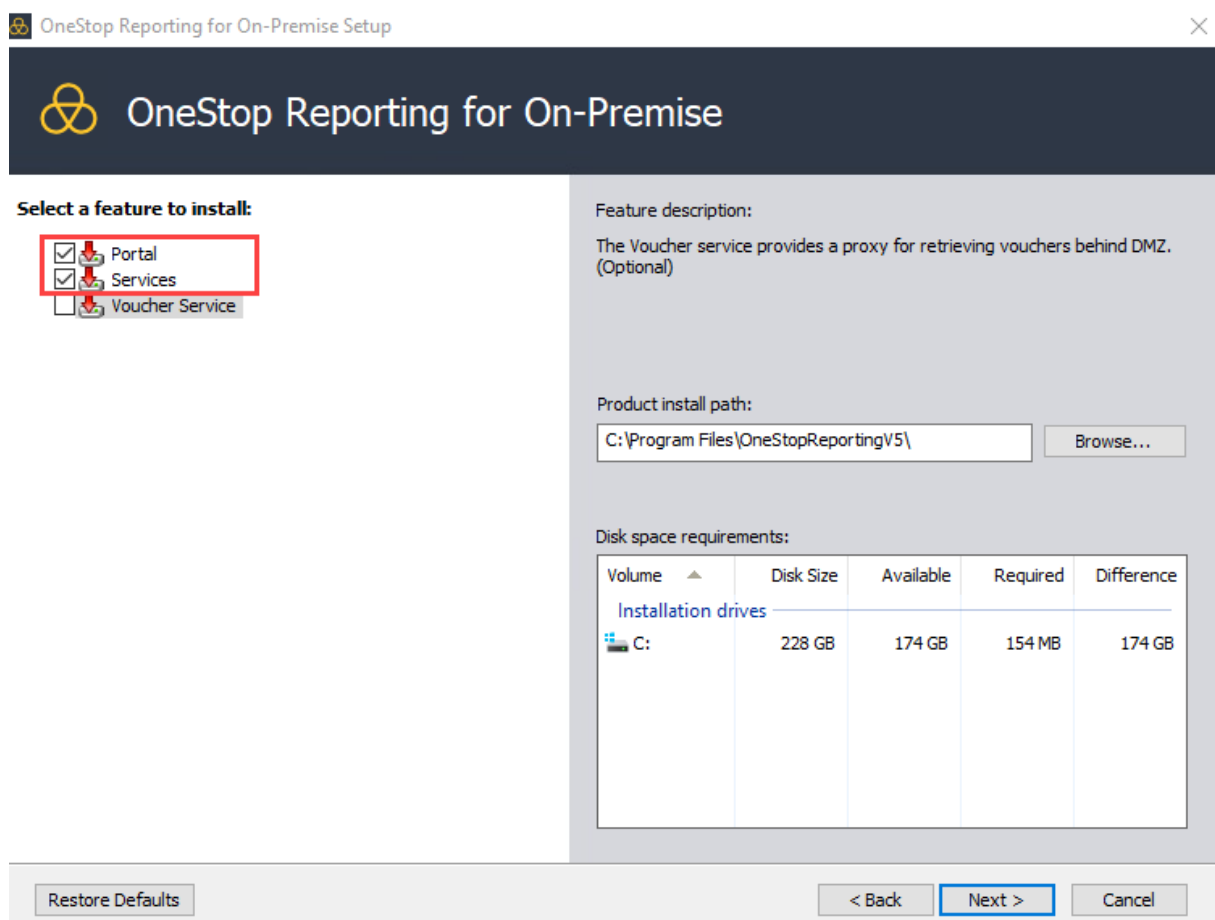


NOTE: Under **Select a feature to install**, the check boxes for **Portal** and **Services** are both selected by default. This means you are both installing the web portal as well as Windows services to allow services to be run in the background.

NOTE: If you are using DMZ server, the recommended setup is to first install the Portal (outside the firewall), then install Services and Voucher Service (inside the firewall). For more information about the additional settings for Voucher Service, see the “[Setup for DMZ server users](#)” section.

6. Leave the **Portal** and **Services** check boxes selected.
7. Under **Product install path**, you will in most instances keep the default path. However, you can change the path to suit your needs.

NOTE: You can see the disk space requirements for this application in the **Disk space requirements** list.



OneStop Reporting for On-Premise Setup

OneStop Reporting for On-Premise

Select a feature to install:

- Portal
- Services
- Voucher Service

Feature description:
The Voucher service provides a proxy for retrieving vouchers behind DMZ. (Optional)

Product install path:
C:\Program Files\OneStopReporting\5\ Browse...

Disk space requirements:

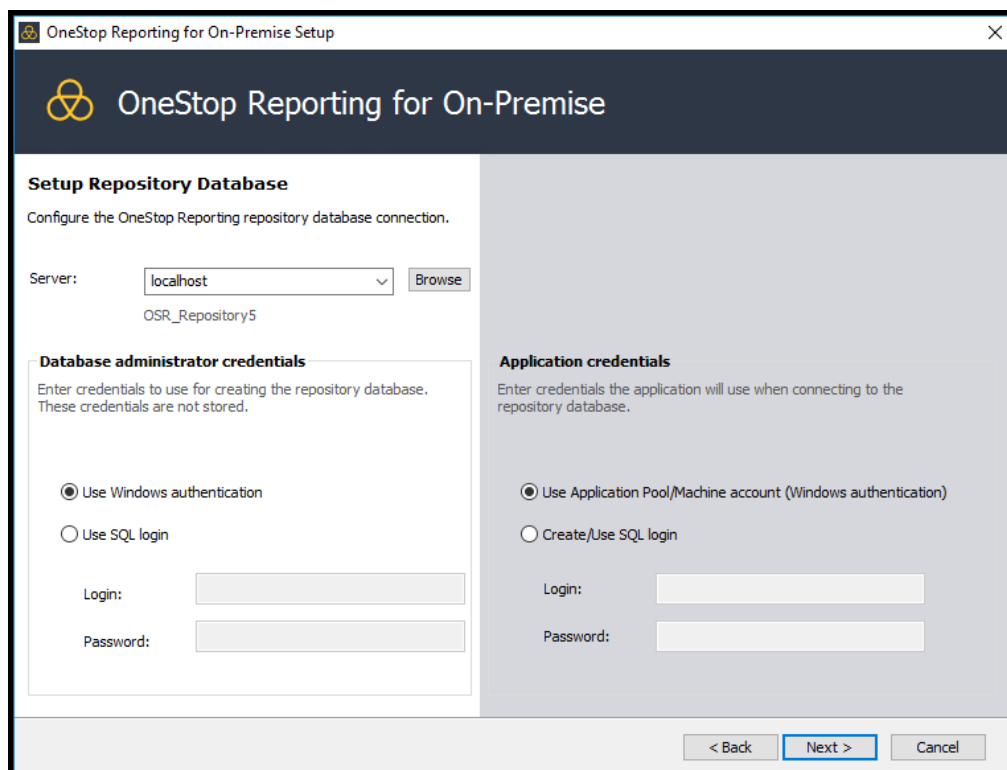
Volume	Disk Size	Available	Required	Difference
Installation drives				
C:	228 GB	174 GB	154 MB	174 GB

Restore Defaults < Back Next > Cancel

In the next dialog box, you will configure the repository database connection.

NOTE: To set up this connection, you must have administrator authorization in your system.

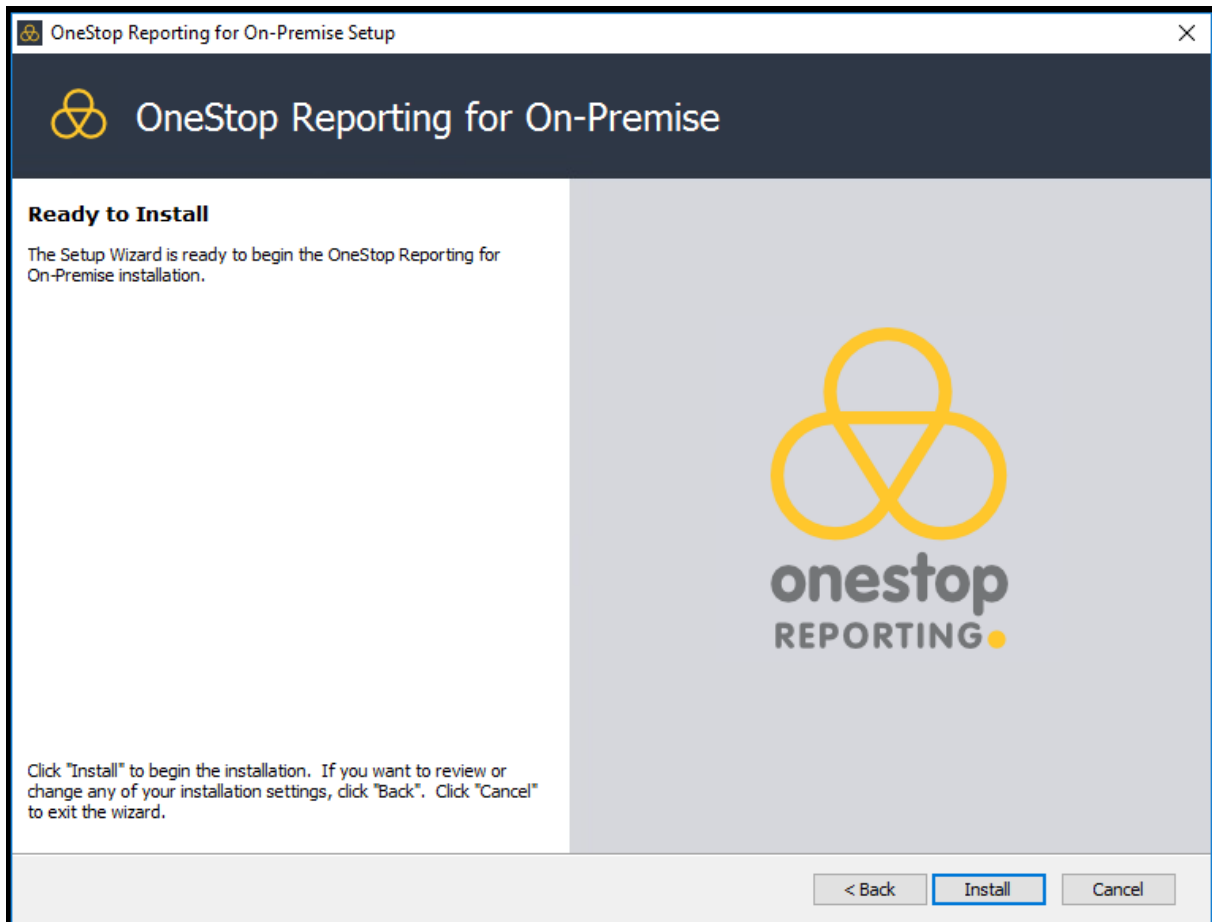
8. In the **Server** list, select your host SQL server. If different from the default localhost, click **Browse**.
9. Under **Database administrator credentials**, select how to create the repository, either by Windows authentication or your SQL login credentials. The user you enter here needs permission for creating a repository database.
10. Under **Application credentials**, enter the credentials the application will use when connecting to the repository database. Use either Windows authentication or select to create or use SQL login*.
11. Click **Next**.



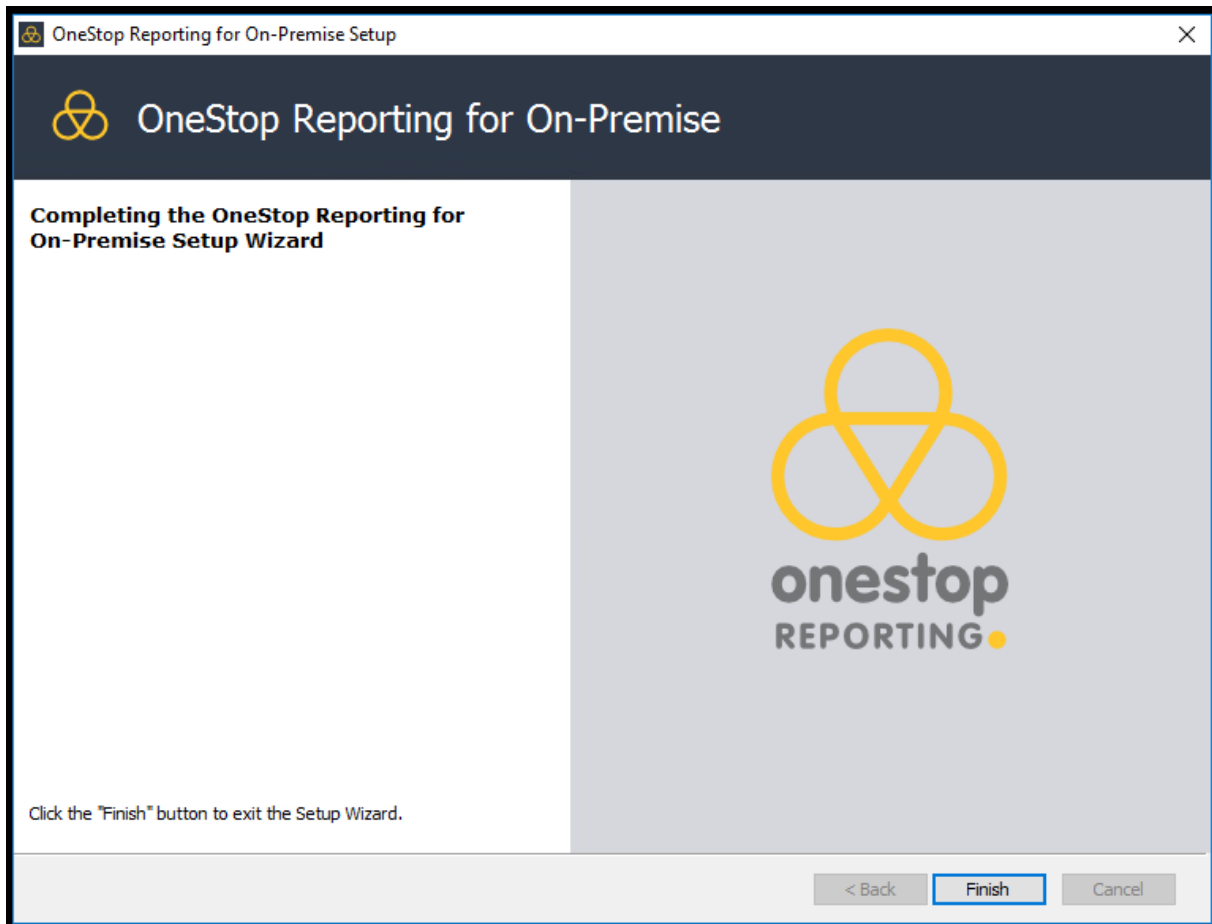
*You can choose if you set up the repository connection with an SQL user or an Application pool/Machine account user:

- **Application pool/Machine account user:** The IIS is using the machine account in order to communicate with the database. If you have IIS and SQL server on the same physical machine, the application pool user needs access (by default, this user is called IIS APPPOOL\OneStop Reporting), but if the Portal and the SQL server is located on different servers, the *machine account* needs access to the OSR_Repository5 database. This is the user the portal is using for communicating with the SQL server. The application pool can also be set up with a dedicated account (make sure this account doesn't have a password expiring).
- **SQL user:** If you use this option, the SQL user will get DB_owner access rights to the OSR_Repository5 database.

12. Click **Install**.



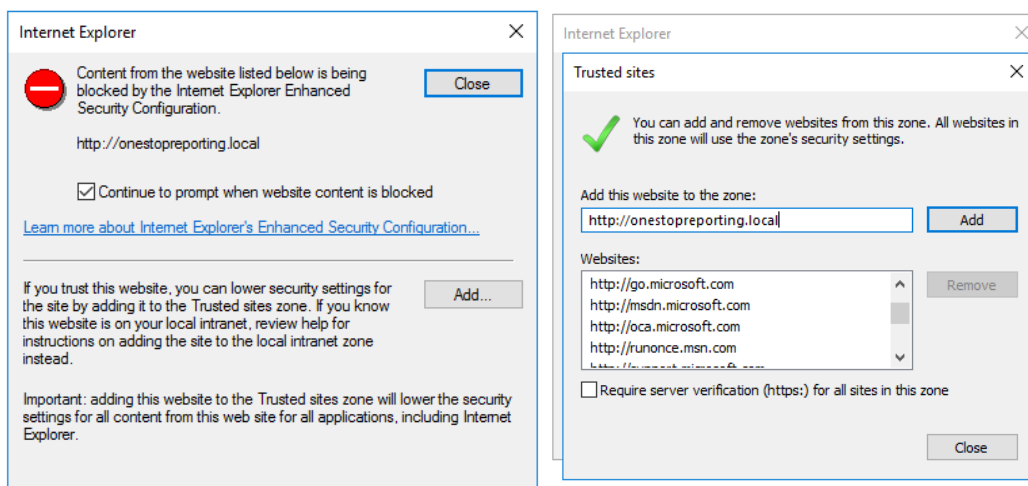
13. Click **Finish**.



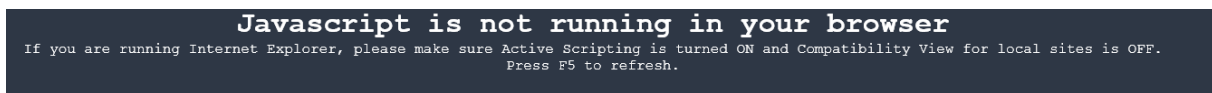
Next, the URL **http://onestopreporting.local** opens in your browser. This is a temporary binding for the site in IIS and can be changed there.

NOTE: You might get a pop-up from your browser asking if this is a secure site. You must add this to your trusted sites.

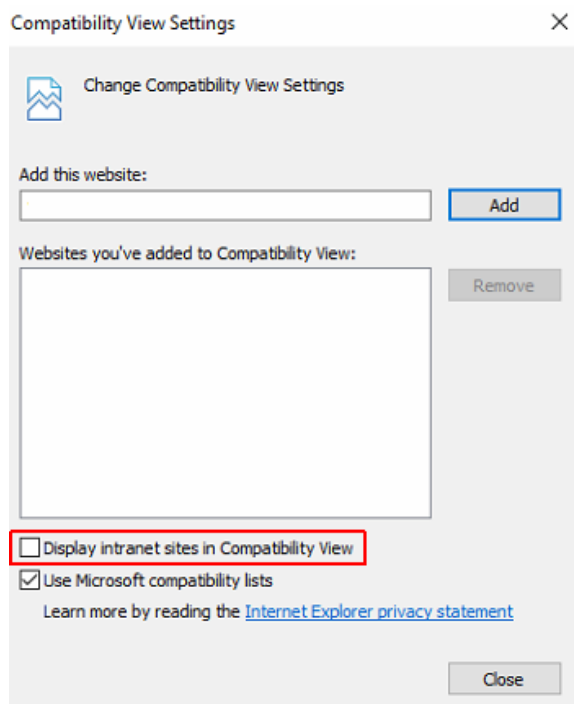
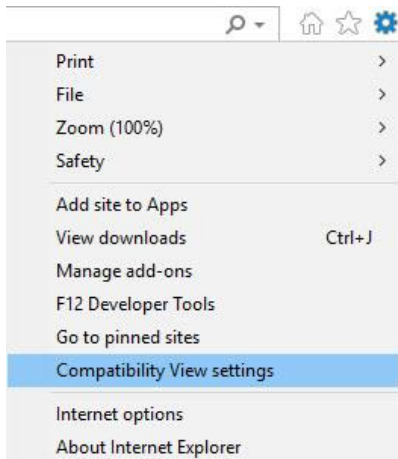
- Click **Add**.
- Next to the **Add this website to the zone** field, click **Add**.



NOTE: If are using Internet Explorer and receive the following error message:



- Go to **Settings > Compatibility View Settings**.
- Deselect the **Display intranet sites in Compatibility View** check box.



NOTE: You may also use one of the other supported browsers to open the portal.

14. You must now create an account for an administrator. Enter:

- Name
- Email
- Password

Welcome to OneStop Reporting!

This quick setup wizard will help you configure the basic settings and will only take a moment.

1

2

3

Administrator setup

Enter the information of the user you want as the initial Portal administrator.

FULL NAME

EMAIL

NEW PASSWORD

CONTINUE

15. Under **Email setup**, you must enter your SMTP host and port.
16. In the **From email** field, enter the email you will be using to send emails from the portal. This could be a group email you have set up specifically for this task.
17. Under **Authentication**, select whether to use **Default** or **Specified** authentication:
 - **Default:** Uses the default identification (SSL).
 - For **Specified** authentication, enter the username and password for the SMTP host.


Welcome to OneStop Reporting!

This quick setup wizard will help you configure the basic settings and will only take a moment.

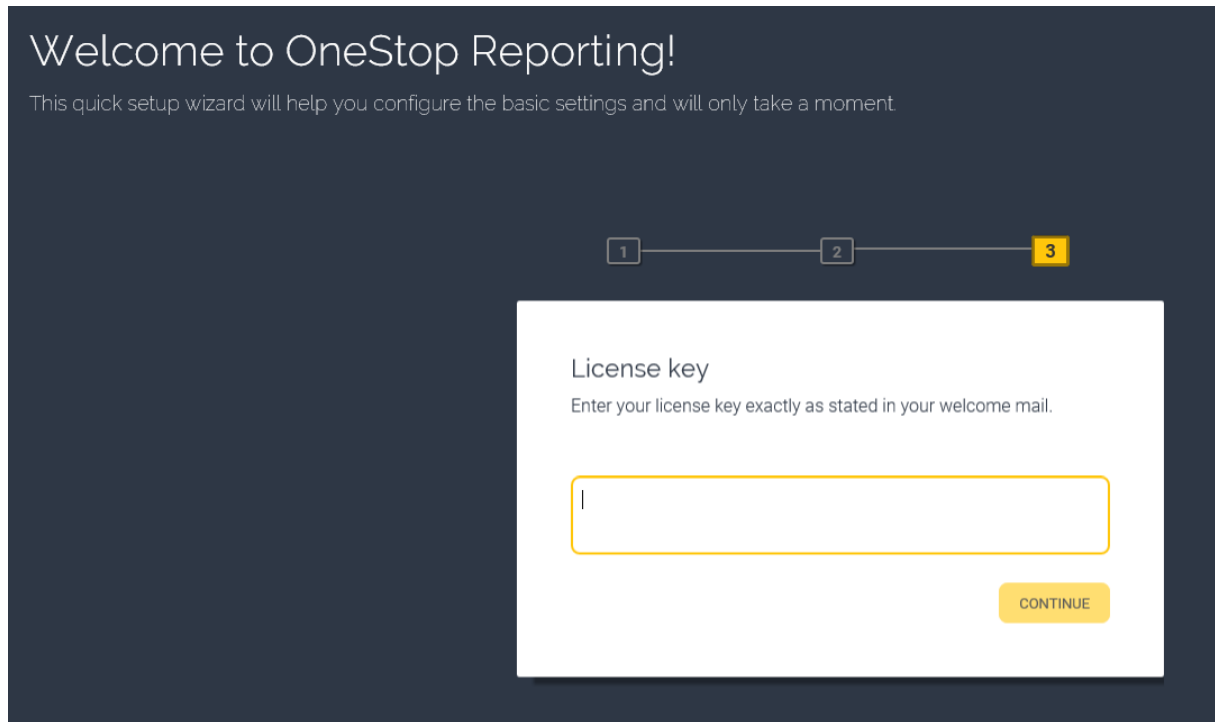


E-mail setup

The portal needs to be able to send e-mail within your organization.

SMTP HOST	<input type="text" value="smtp.sendgrid.net"/>	PORT	<input type="text" value="587"/>
FROM EMAIL	<input type="text" value="onestopreporting@mycompany.com"/>		
AUTHENTICATION	<input type="radio"/> DEFAULT <input checked="" type="radio"/> SPECIFIED		
USERNAME	<input type="text" value="*****"/>		
PASSWORD	<input type="password" value="*****"/> 		
<input checked="" type="checkbox"/> Enable secure connection (SSL)			
<input type="button" value="CONTINUE"/>			

18. Under **License key**, enter the license key you received from OneStop Reporting. Usually, this will be in an e-mail.

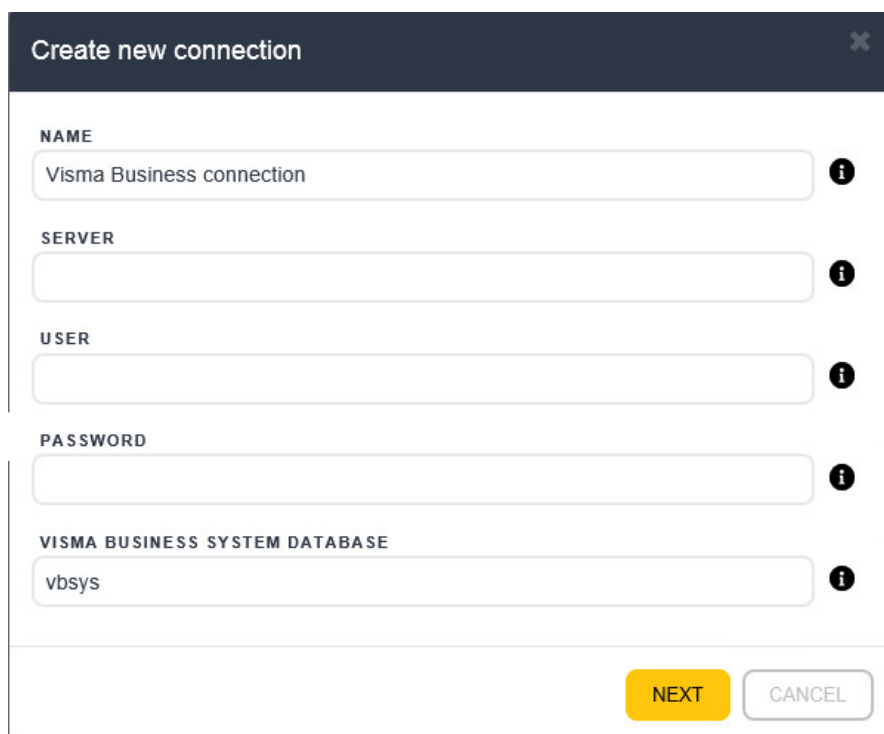


The OneStop Reporting portal opens.

NEXT: You must create a connection to your ERP system.

Create a new connection

- In the **Create new connection** dialog box, enter:
 - Name:** Enter a name for your connection.
 - Server:** Enter server name or the IP address of your SQL server (name\instance) where your accounting database is stored.
 - User:** Leave empty if you want to use Windows authentication or enter SQL user for accessing the accounting databases. This requires minimum read access rights to all databases, including the system database. However, if you plan to do budgeting with write-back to the ERP system, you need to have both read and write rights to all accounting databases.*
 - Password:** Leave blank if you are using Windows authentication or enter the password for the SQL user.
 - System database:** Enter the database for the accounting system. (The picture shows an example for Visma Business.)



*You can choose if you set up the repository connection with an SQL user or Windows authentication:

- SQL User:** If you set up using an SQL user, this user's level of access controls the general level of access for *all* users in OneStop Reporting (read access for running reports, read+write access if you want to do budgeting and write back to the system).
- Windows authentication:** If you use Windows authentication, the application pool user will be the domain user - meaning that the application pool user (or machine account) needs the necessary access rights to the accounting databases.

The IIS is using the machine account in order to communicate with the database. If you have IIS and SQL server on the same physical machine, the application pool user needs access (by default, this user is called IIS APPPOOL\OneStop Reporting), but if the Portal and the SQL server is located on different servers, the machine account needs access to the ERP database. This is the user the portal is using for communicating with the SQL server. The application pool can also be set up with a dedicated account in the IIS management console (make sure this account doesn't have a password expiring).

If the data connection is set up to use SQL authentication, then there is no need to specify any access rights for the machine account on the SQL server, because the SQL user set up in the data connection will be used for accessing the database.

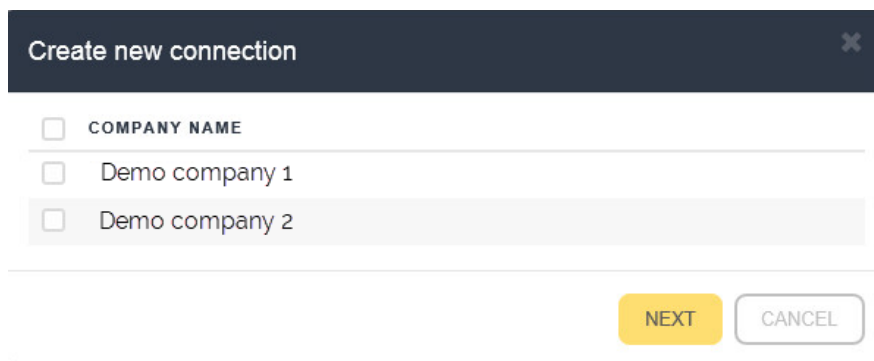
However, if you have set up the data connection with Windows authentication, the machine account is being used as the domain user when accessing the database, and therefore this user needs to be granted access to the ERP database on SQL server.

NOTE: You can access this dialog box at a later stage by clicking the **Get Data** module and clicking the **+ New** or **Edit** button.

2. Click **Next**.

Now, you get a list of available company databases.

3. Select company or companies from the list.
4. Click **Next**.

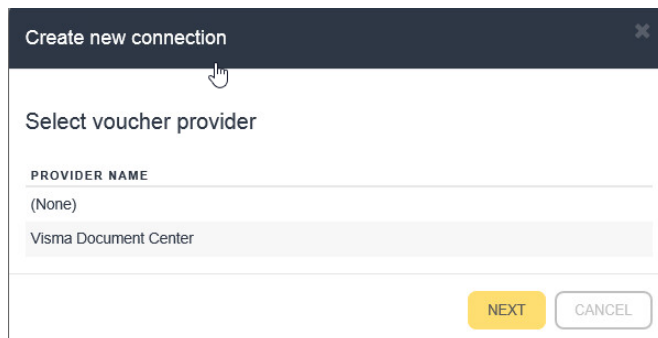


The screenshot shows a dialog box titled "Create new connection" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "COMPANY NAME" with a list of two items: "Demo company 1" and "Demo company 2". Each item has a checkbox to its left. The "Demo company 2" item is highlighted with a light gray background. At the bottom right of the dialog, there are two buttons: a yellow "NEXT" button and a white "CANCEL" button with a gray border.

5. Select the voucher provider you use or click **None**. The picture shows an example where Visma Document Center is used.

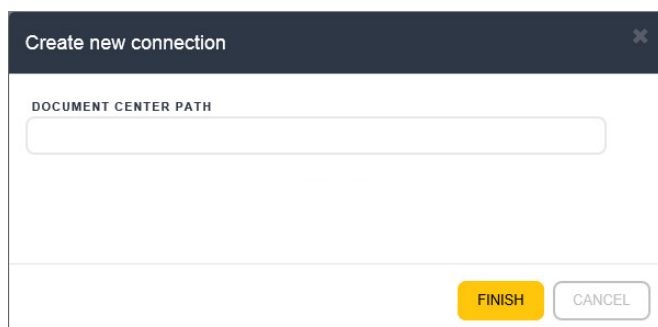
NOTE: If you select **None**, you will not set up the voucher view option and you can go directly to step 7.

NOTE: This step is not visible for all integrations.



The screenshot shows a dialog box titled "Create new connection" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Select voucher provider". Underneath, there is a label "PROVIDER NAME" followed by a list of two items: "(None)" and "Visma Document Center". The "Visma Document Center" item is highlighted with a light gray background. At the bottom right of the dialog, there are two buttons: a yellow "NEXT" button and a white "CANCEL" button with a gray border.

6. In the **Document center path** field, enter the path where the vouchers are stored. It is important that the portal or Voucher Service has access to this folder.



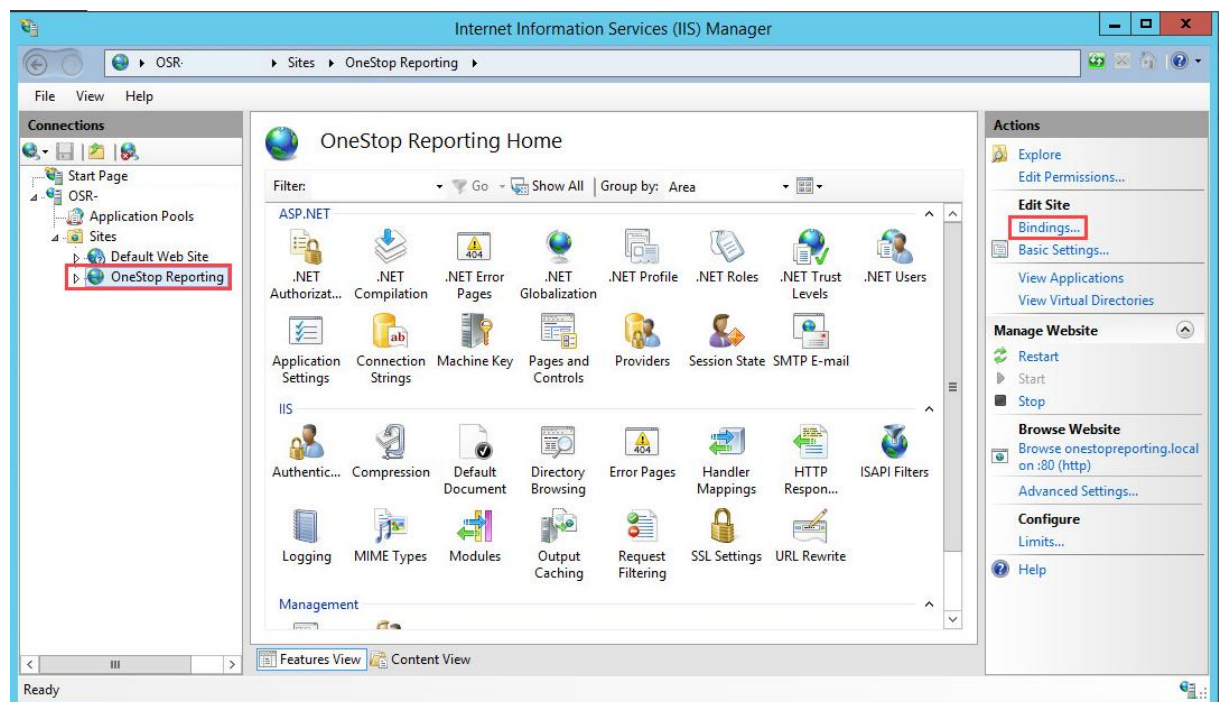
The screenshot shows a dialog box titled "Create new connection" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "DOCUMENT CENTER PATH" followed by a text input field. At the bottom right of the dialog, there are two buttons: a yellow "FINISH" button and a white "CANCEL" button with a gray border.

- When you have added the document center path, click **Finish**.

In order to be able to invite users to OneStop Reporting, you must have the correct URL in System Settings. The next steps entail adding a URL in the **Internet Information Services (IIS) Manager** and then, you add this URL under **System Settings** in the portal.

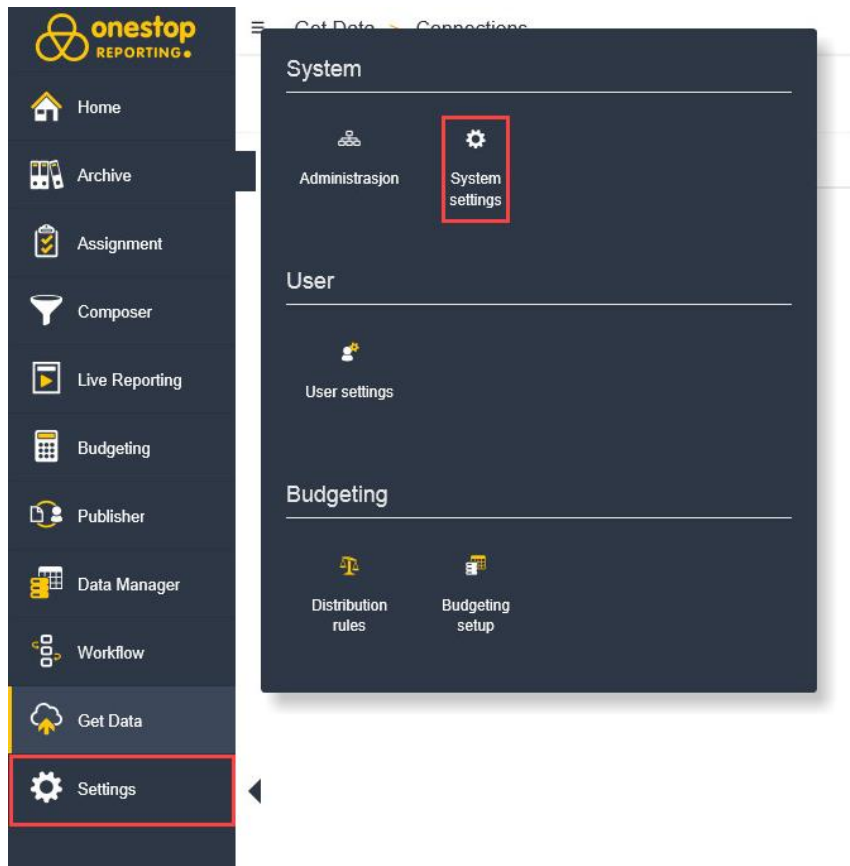
You must first add the path in the **Internet Information Services (IIS) Manager**:

- In the **Internet Information Services (IIS) Manager**, open the **Sites** folder > **OneStop Reporting**.
- Click **Bindings** under the **Actions** menu.
- In the **Site Bindings** dialog box, click **Add...**
- In the **Host name** field, enter the host name for the web server (unless something else is set up in the DNS).
- Click **OK**.



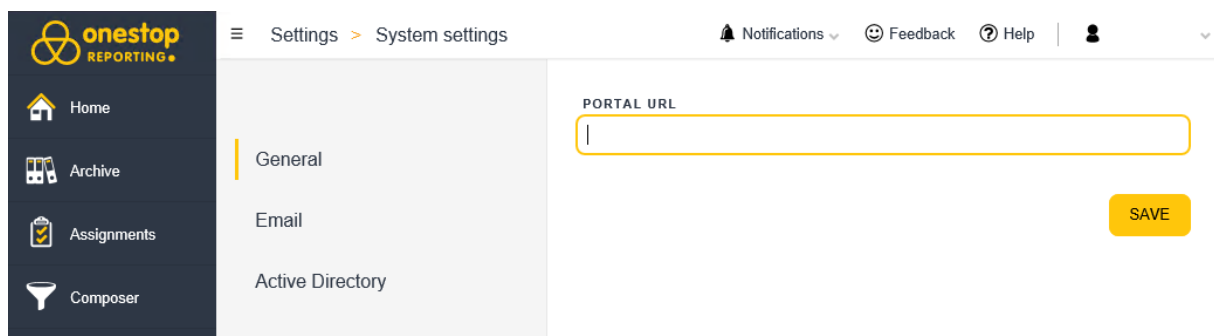
Next, you add this URL to the **System Settings** in the portal:

13. In **OneStop Reporting**, click **Settings** and then click **System Settings**.



14. In the **Portal URL** field, enter the URL you set up in the **IIS Manager**.

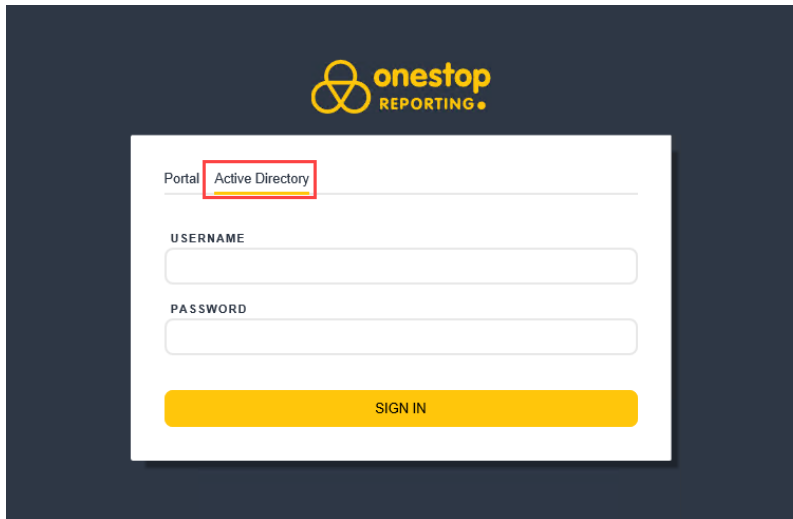
15. Click **Save**.



NOTE: If you click the **Email** tab, you can change the email settings you provided earlier.

Use Active Directory to add users

You can use your Active Directory (AD) to automatically add users to OneStop Reporting. In this way, users can log on with their domain credentials instead of having a OneStop Reporting user name and password. When this option is activated, the **Log on** screen will look like the picture below.



NOTE: OneStop Reporting does not offer Single Sign On.

You can also use **Role mappings** to limit access based on roles in your AD.

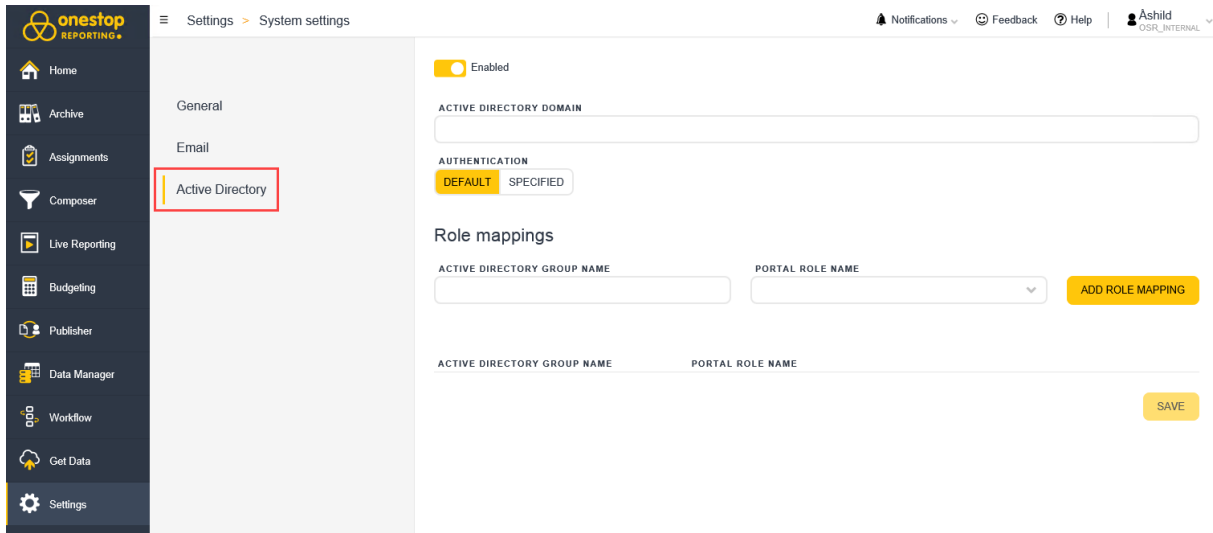
In addition, you can map AD roles to roles in OneStop Reporting. The OneStop Reporting roles are set up in **Settings > Administration > Roles** tab (refer to [Create new role](#)).

1. Click the **Active Directory** tab
2. Activate the Active Directory by turning on the **Enabled** switch.
3. In the **Active Directory domain** field, enter your AD domain.
4. Select to use the **Default** authentication or click the **Specified** button to enter a specified authentication method (domain controller; server or IP).

NOTE: Now, *all* users in your AD have access to OneStop Reporting.
5. You can limit the access by using a group name from your AD;
 - a. In the **Active Directory group name** field, enter the name of the AD role.
 - b. Click the **Add role mapping** button.

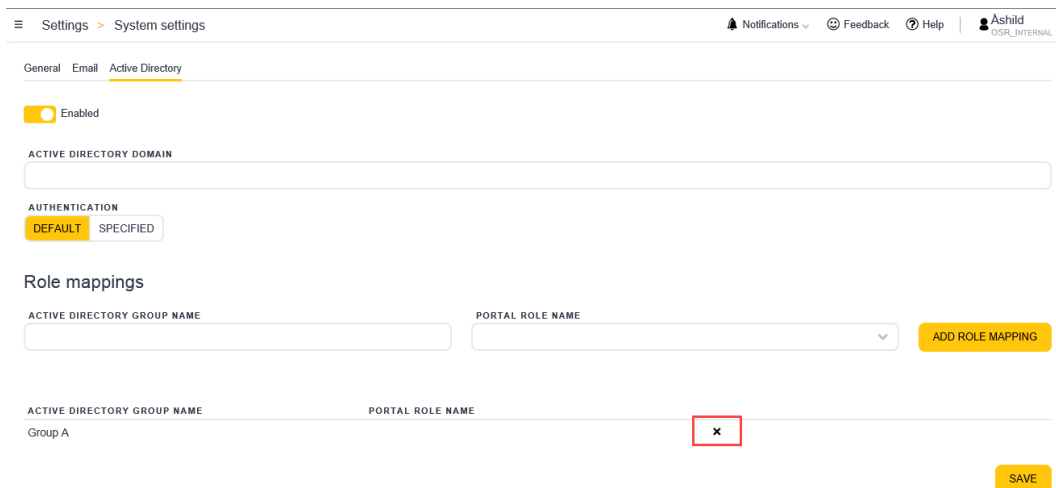
NOTE: Best practice would be to do this in your AD before you enable this in OneStop Reporting.

6. If you have set up roles in OneStop Reporting, you can map the roles from your AD to the roles in OneStop Reporting:
 - a. In the **Active Directory group name** field, enter the name of the AD role.
 - b. In the Portal role name list, select the OneStop Reporting role.
 - c. Click the **Add role mapping** button.
7. Click **Save** when you are done.



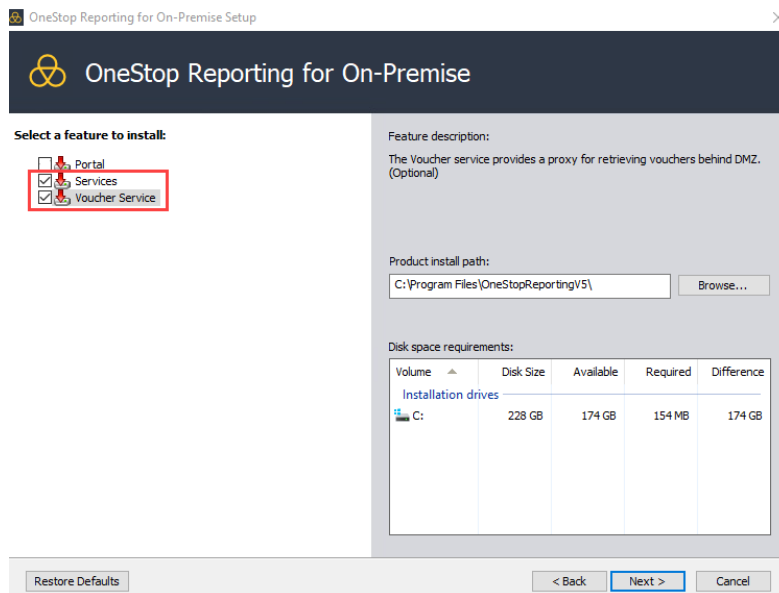
To delete a Role mapping;

1. Click the **X** as shown in the picture below.
2. Click **Save**.



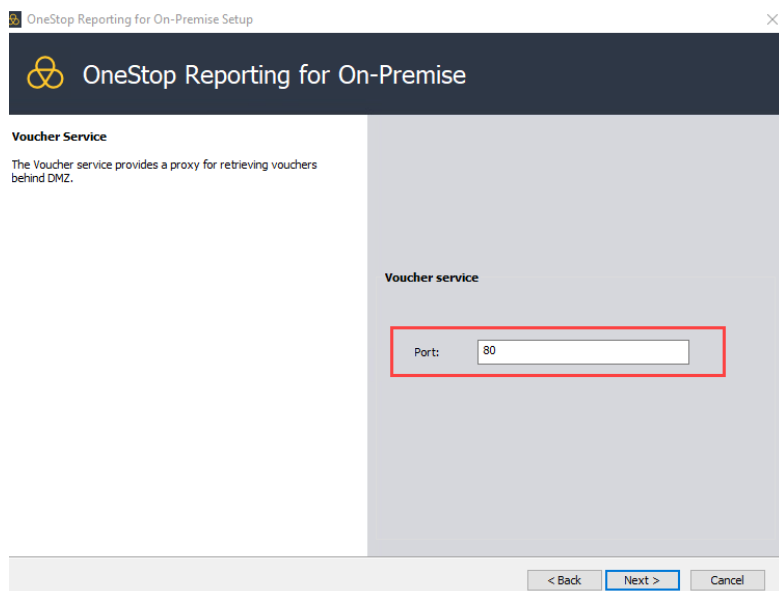
Setup for DMZ server users

If you are using DMZ servers, the recommended setup is to first set up the portal (outside the firewall), and then install the services and voucher service (inside the firewall).

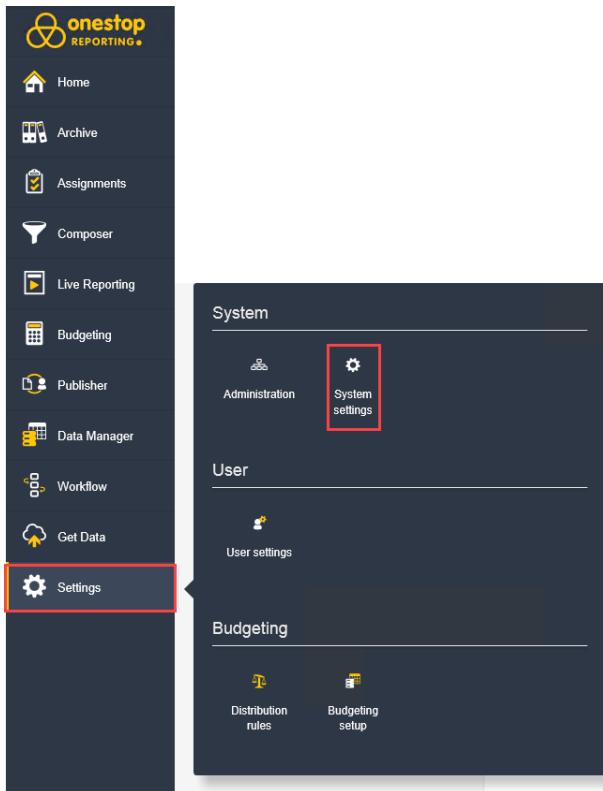


The steps are exactly the same as described earlier in this document, with one difference; you must set up the voucher service if your organization uses vouchers.

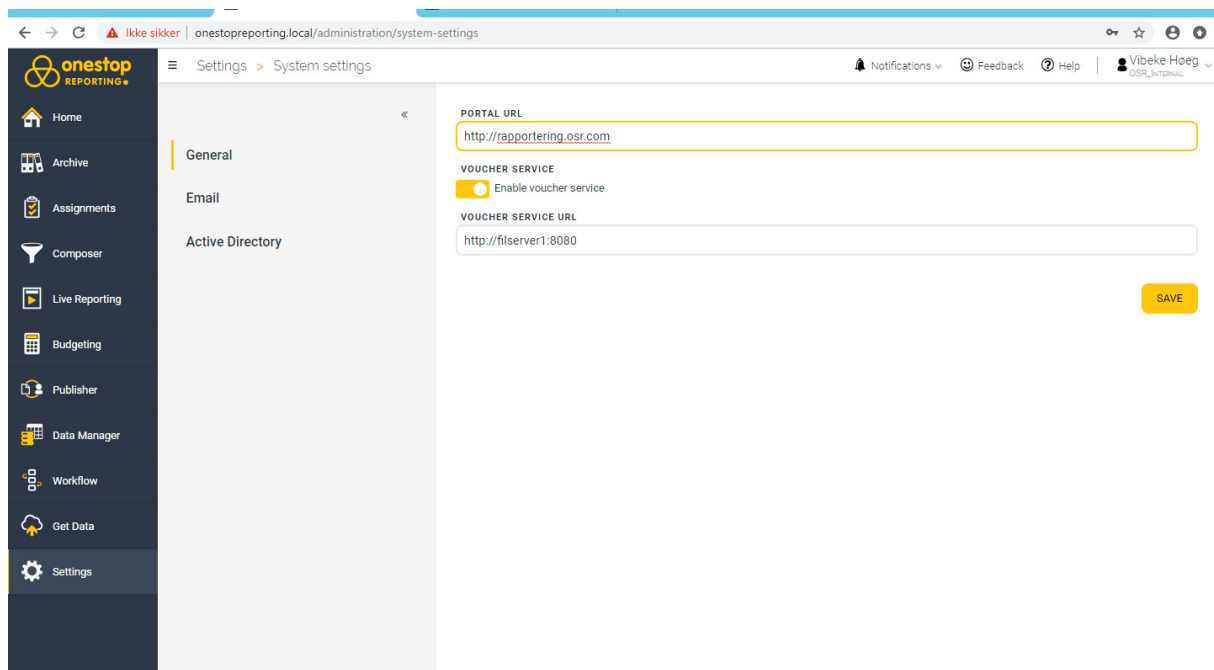
In the Installation wizard > **Voucher Service** step, you must enter port number for the voucher service. This is the port that is used for communicating to the external web server.



After you are done installing, you must go to **Settings > System Settings**.



Under **Voucher service**, turn on the **Enable voucher service** switch.



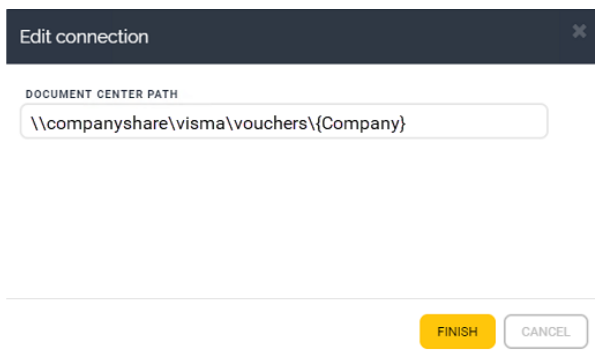
In the **Voucher service** URL field, enter the URL for the voucher service with the port number you added during installation. `http://<fileservname>:port number`.

General setup for Visma Document Center

Add document center path for incoming invoices

1. Click **Get Data**.
2. Click the connection and then, click **Edit**.

NOTE: It is important to enter {Company} at the end of the file path. See example below. However, if you already have used the Voucher viewer for OneStop reporting version 4.x, you probably already have *onestopreporting.voucherviewer* set up in the Prog table in Visma. If this setup exists, OSR will read from this table.



Add Document Center Path for outgoing invoices

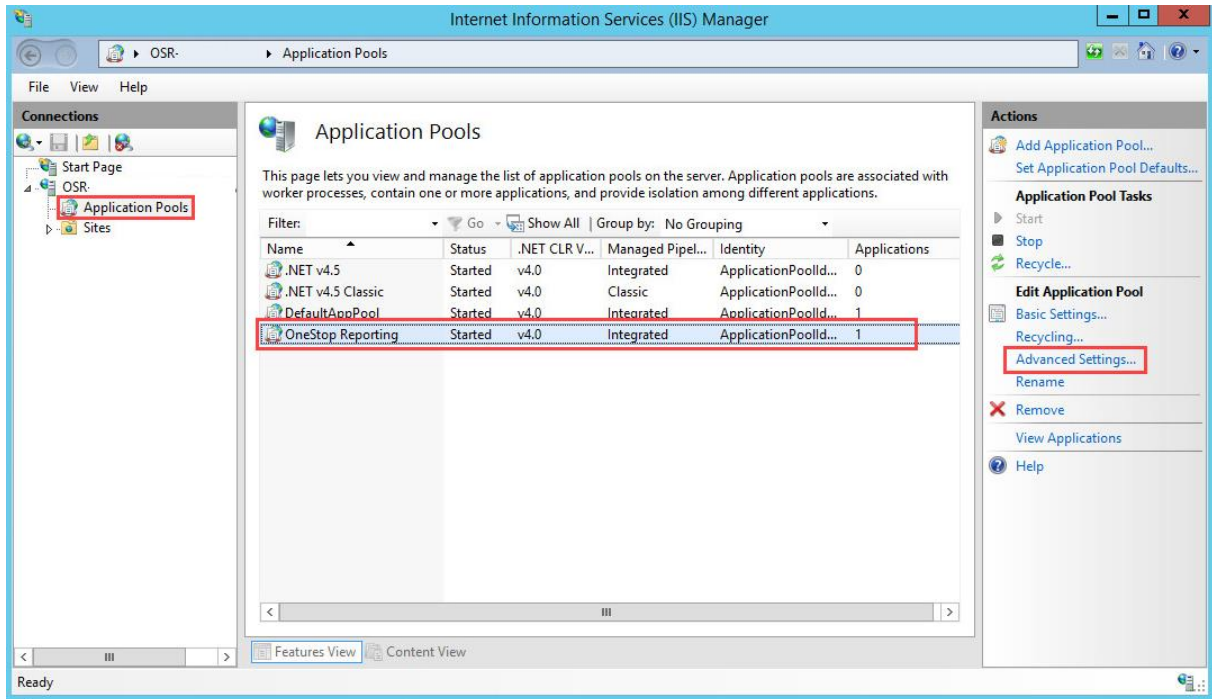
NOTE: This step is done in Visma (prog table).

1. Go to **Programs**.
2. Add a new line.
3. In the **EXE-file name** column, enter "onestopreporting.voucherviewer.outgoing".
4. Enter the file path under **Data area** (Dataområde).

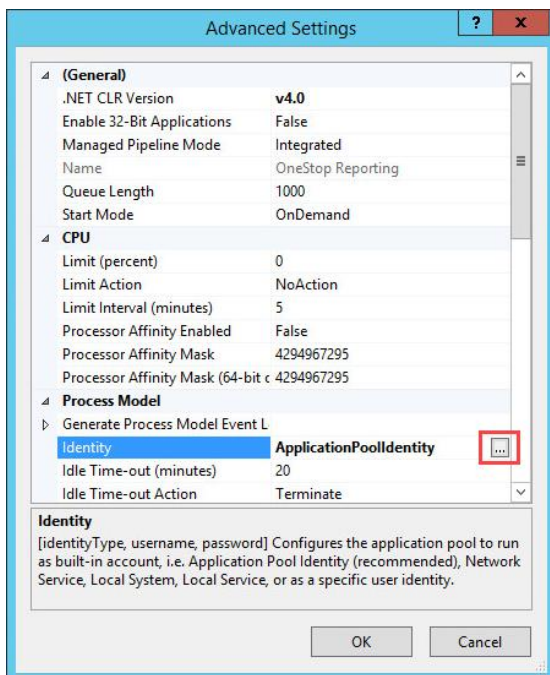
Programmer			
Prog.nr	EXE-filnavn	Programområde	Dataområde
1	Visma.Workflow.Client.Windows.exe	C:\Program Files\Visma\Docume	\\vismabusiness\Document
2	onestopreporting.voucherviewer.outgoing		c:\

Set up application pool user

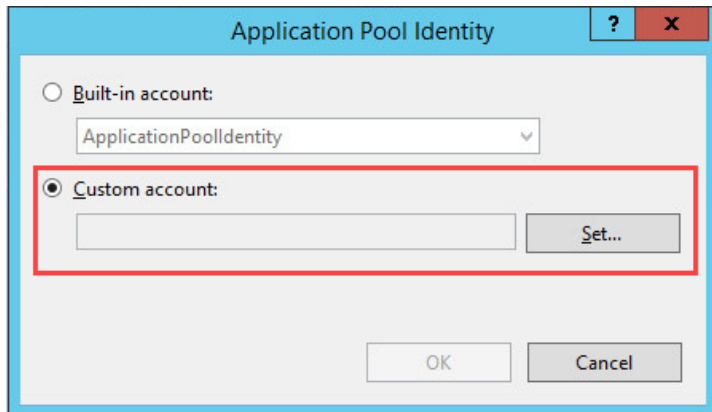
1. Open the **IIS Manager**.
2. In the **Connections** tree, click **Application Pools**.
3. Select the relevant pool and click **Advanced Settings...**.



4. In the **Advanced Settings** dialog, click the **More** button next to **Identity**.



5. In the **Application Pool Identity** dialog, select the **Custom account** option.
6. Click **Set...**



7. Fill in username and password and click **OK**.

NOTE: The system user must have access to the voucher files on the fileserver.

