

To incorporate the newly created iReport in ConcourseSuite, run ant deploy to get the report compiled. Make note of the name of the .xml file (you must use .xml).

Backup your database.

You need to add a record to the report table in the database. You must understand roles and permissions to get the appropriate values for the columns of the new record. The record must be deployed into the webapps directory of the servlet container.

It is easiest to create a beanshell script to insert the report into the database tables (with appropriate permissions) within ConcourseSuite. A sample script for Unix and Postgres environments is below:

```
#!/bin/sh
//bin/true; exec java -classpath .:${path/to/servlet.jar}:lib/bsh-2.0b2.jar:lib/
log4j-1.2.9.jar:build/lib/aspcfs.jar:lib/postgresql-8.1-405.jdbc3.jar:build/lib/
darkhorseventures.jar:build/lib/zeroio-iteam.jar bsh.Interpreter "$@" "$@"

/* Install a jasper report script
 * - The .xml will be copied by ant
 * - This script inserts the report into the database so users can use it
 */
import org.aspcfs.utils.DatabaseUtils;
import com.darkhorseventures.database.ConnectionPool;
import com.darkhorseventures.database.ConnectionElement;
import java.sql.*;
import java.io.File;
import org.aspcfs.utils.DatabaseUtils;
import org.aspcfs.modules.reports.base.Report;
import org.aspcfs.modules.admin.base.PermissionCategory;
import org.aspcfs.modules.admin.base.Permission;

if (bsh.args.length != 6) {
    print("Usage:");
    print(" installReport <filename> <moduleName> <permissionName> <title>
<description> <database Name>");
    print("");
    System.exit(0);
}

String filename = bsh.args[0].trim();
String moduleName = bsh.args[1].trim();
String permissionName = bsh.args[2].trim();
String title = bsh.args[3].trim();
String description = bsh.args[4].trim();
```

```

String dbName = bsh.args[5].trim();
int typeId = 1;
String user = "postgres";
String password = "";
String url = "jdbc:postgresql://127.0.0.1:5432/" + dbName;
String driver = "org.postgresql.Driver";

// Setup the Connection Pool
ConnectionPool sqlDriver = new ConnectionPool();
sqlDriver.setDebug(false);
sqlDriver.setTestConnections(false);
sqlDriver.setAllowShrinking(true);
sqlDriver.setMaxConnections(2);
sqlDriver.setMaxIdleTime(60000);
sqlDriver.setMaxDeadTime(300000);

// Get a database connection
print("Getting a database connection...");
ConnectionElement ce = new ConnectionElement(url, user, password);
ce.setDriver(driver);
Connection db = sqlDriver.getConnection(ce);

try {
//Check to see if report already exists
int reportId = Report.lookupId(db, filename);
if (reportId == -1) {
//Get the report category id for which this report will be listed as
int categoryId = PermissionCategory.lookupId(db, moduleName);
//Update the category report capability
PermissionCategory.updateReportAttribute(db, categoryId, true);
//Get the permission id for accessing this report
int permissionId = Permission.lookupId(db, permissionName);
//Insert the report
Report report = new Report();
report.setCategoryId(categoryId);
report.setPermissionId(permissionId);
report.setFilename(filename);
report.setType(typeId);
report.setTitle(title);
report.setDescription(description);
report.setEnteredBy(0);
report.setModifiedBy(0);
report.insert(db);
print("Report inserted: " + filename);
} else {

```

```

    print("Report already exists: " + filename);
  }
} catch (Exception e) {
  e.printStackTrace();
  System.exit(1);
}

System.exit(0);

```

- Save the script in the "bin" directory in the source installation path
- Make it executable
- Update the classpath at the top of the script with the path to tomcat's servlet.jar file (This script is configured to run on the same machine as the database)
- Execute the following command at the top of the source installation path

```
installReport <filename> <moduleName> <permissionName> <title> <description>
<database Name>
```

<filename> is the name of the .xml created from Jasper in the source install path
 <moduleName> is the name of the module from which you want rights granted. The names of the modules can be found in the permission_category table of the database or directly from the table shown below.

To add a report to the queue, choose a module to see a list of corresponding reports:

Module
Accounts
Admin
Communications
Company
Contacts
Global Folders
Help Desk
Leads
My Home Page
Pipeline
Website

Another way to find allowed an moduleName is to execute this query from within a terminal window:

```
SELECT category FROM permission_category WHERE enabled = true
```

You may only have one permission ID per module. You can find the allowed permissionName with this command:

```
SELECT permission FROM permission WHERE enabled = true
```

Use the most specific permission to protect reports on sensitive data. (Example: If you use “reports” as the moduleName and permissionName, anyone who can view the reports will have permission to see and access your newly added report which could permit sensitive data to be viewed by anyone accessing the report module).

<title> and <description> are the exact words that will appear within ConcourseSuite’s report module for your new report. (Example: Account Contacts is the <title> of one of the pre-loaded reports in ConcourseSuite).

Choose a report from the following list, the next step will be to set criteria for the report:

Title	Description
<u>Account Contacts</u>	Who are the contacts in each account?
<u>Account Folders</u>	What is the folder data for each account?
<u>Accounts by Contract End Date</u>	Which accounts are expiring?
<u>Accounts by Date Added</u>	What are my recent accounts?
<u>Accounts by Type</u>	What are my accounts by type?
<u>Action Plan Activity</u>	What are the action plan activities by date for each account?
<u>Action Plan Summary</u>	What is the action plan summary for each account?
<u>Current Accounts</u>	What are my current accounts?

<database Name> is the name that you gave to the ConcourseSuite database when you installed it.

When you have completed the above task, the report should appear in your instance of ConcourseSuite in the Reports module.