

Crestron RoomView® Server  
Edition Report Viewer  
Report Generation Software

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Installation Guide



This document was prepared and written by the Technical Documentation department at:



Crestron Electronics, Inc.

15 Volvo Drive

Rockleigh, NJ 07647

1-888-CRESTRON

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# Report Generation Software: RoomView® Server Edition Report Viewer

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## Introduction

This document is provided as an aid to the installation of RoomView® Server Edition (SE) Report Viewer, Report Generation Software.

### Prerequisites

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**CAUTION:** Before installing RoomView Report Viewer, uninstall the RoomView Configuration Manager if it is present on the system.

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All the software, or software components, in the following lists must be installed on the RoomView server or installed on the client PC where RoomView SE Report Viewer is installed. Be sure that all of the latest updates for these applications are installed.

This application must be installed on the RoomView server and be available to RoomView SE Report Viewer over the network:

- Crestron RoomView Server Edition

This application must be installed on the client PC running RoomView SE Report Viewer:

- Microsoft .NET Runtime Environment 2.x (installed on the client PC)

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**NOTE:** Verify that RoomView SE Report Viewer has access to the RoomView Server Edition database and the RoomView Authorization Service.

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### Rights

The account installing RoomView SE Report Viewer must have the following rights.

- Local Administrator's Rights on any PC where RoomView SE Report Viewer will be installed.
- SQL Login rights.

## Installation Procedure

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**CAUTION:** Before installing RoomView Report Viewer, uninstall the RoomView Configuration Manager if it is present on the system.

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RoomView SE Report Viewer installation consists of two wizards, one for the Report Viewer and one for the Configuration Manager.

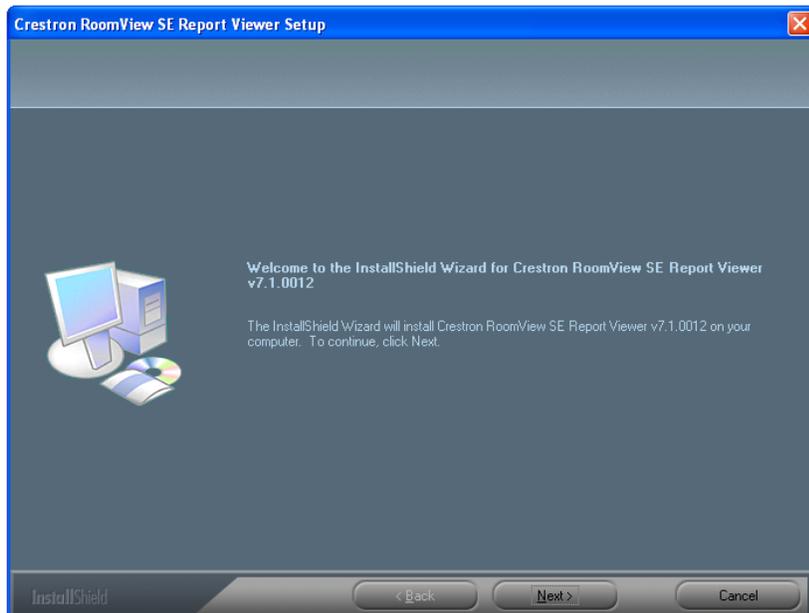
Download the RoomView Server Edition installer from the Crestron website to your desktop. Double-click the installer file. The Crestron RoomView SE Report Viewer “Setup Welcome” window for the RoomView Server Edition installation will appear.

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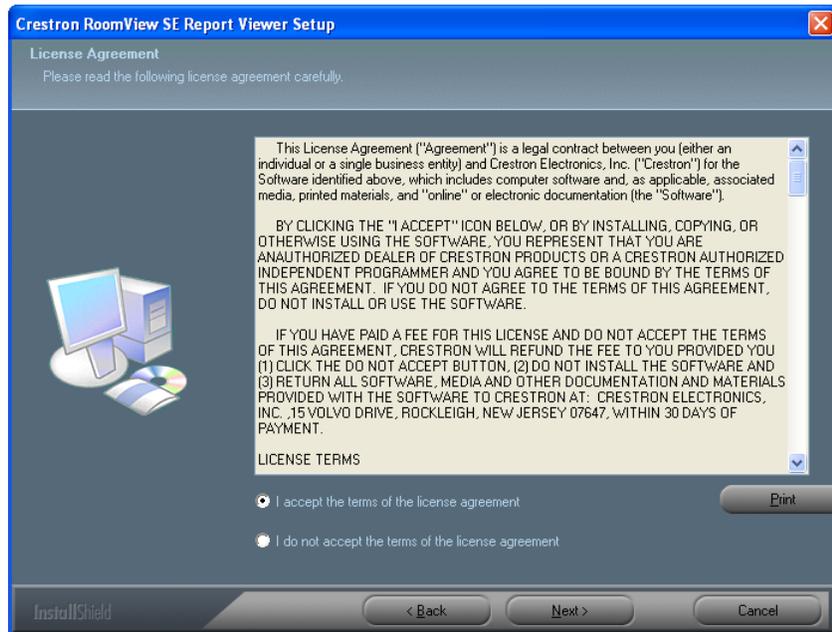
**NOTE:** For the sake of brevity, RoomView SE Report Viewer will be referred to simply as Report Viewer. Where it is necessary to distinguish RoomView SE Report Viewer from another RoomView program, the full name will be used.

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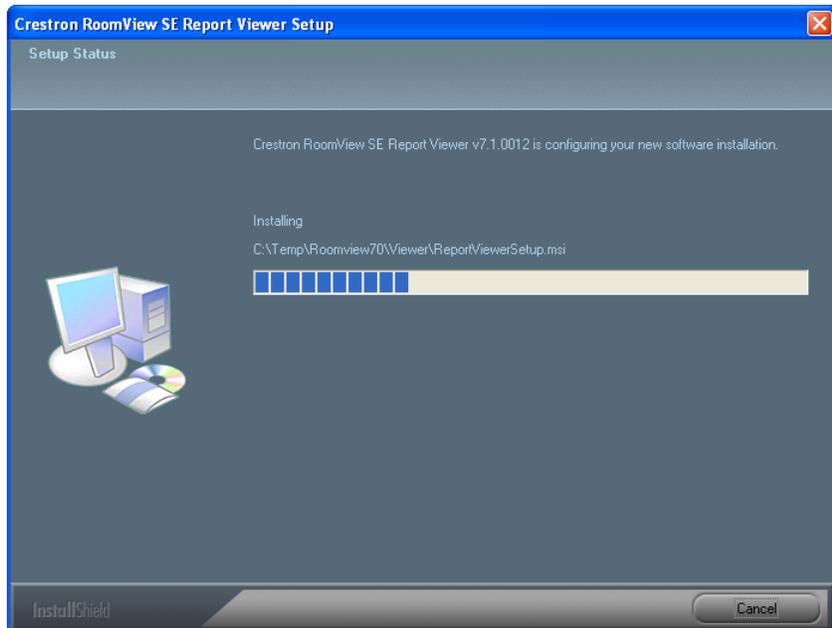
### *Crestron Report Viewer “Setup Welcome” Window*



1. Click **Next** to display the “License Agreement” window where you will be prompted to accept (or not) the license agreement governing the Report Viewer application. Accept the agreement (if you want to continue) by clicking the appropriate radio button. You can also use the **Print** button to retain a copy for your records. Click **Next** to continue.

*“License Agreement” Window*

2. The “Setup Status” window will be displayed while it installs some of the Report Viewer operating files. This window will be dismissed by the setup program when the progress bar is complete.

*“Setup Status” Window*

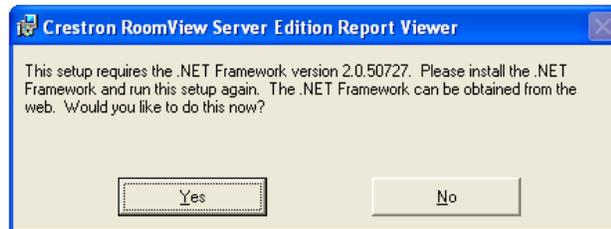
3. If Microsoft .NET 2.0 is not already installed on the PC, an alert will appear indicating that it is required and can be installed immediately by downloading the files from the internet. At this point the RoomView Report Viewer installation will cease. Click Yes to begin the .NET Framework installation.

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**NOTE:** Later versions of Windows XP, Server 2003 and Vista are shipped with .NET 2.0 or later already installed.

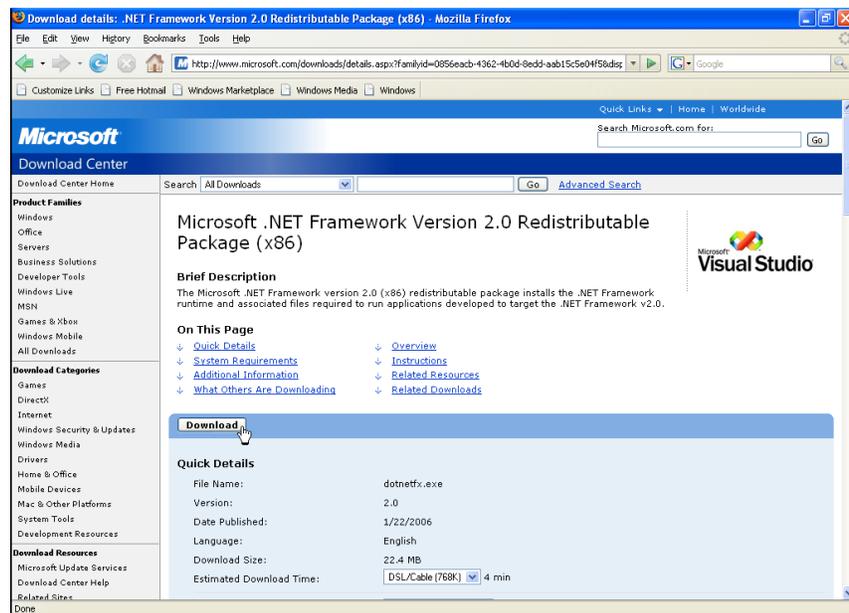
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**“*.NET Framework Required*” Alert**



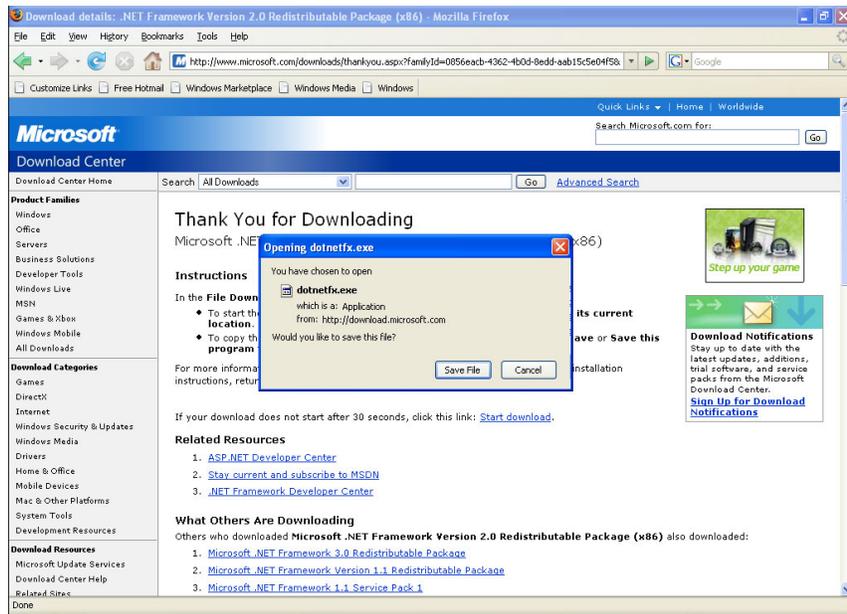
4. Your default browser will open to the Downloads page of the MSDN .NET Framework Development Center. Click the **Download x86 version** link.
5. The “Microsoft Download Center page for Microsoft .NET Framework Version 2.0 Redistributable Package (x86)” will open. Click the **Download** button.

**“*Microsoft Download Center page for Microsoft .NET Framework Version 2.0 Redistributable Package (x86)*” web page**



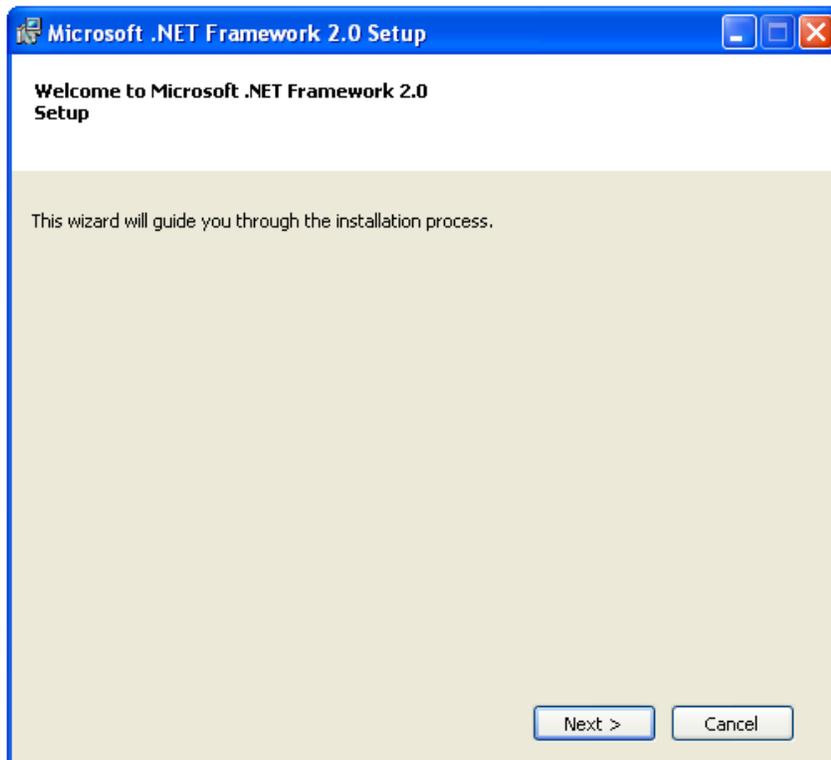
6. Depending on your browser settings, you will be prompted to confirm that you wish to initiate the download. Click **Save File** or **OK**, depending on your browser settings.

*“Microsoft Download Center page for Microsoft .NET Framework with Confirm Dialog”*



7. A progress bar will appear while the installation files are downloaded and extracted. Once those steps are completed, the .NET Framework install wizard will open. Click **Next** to start the installation.

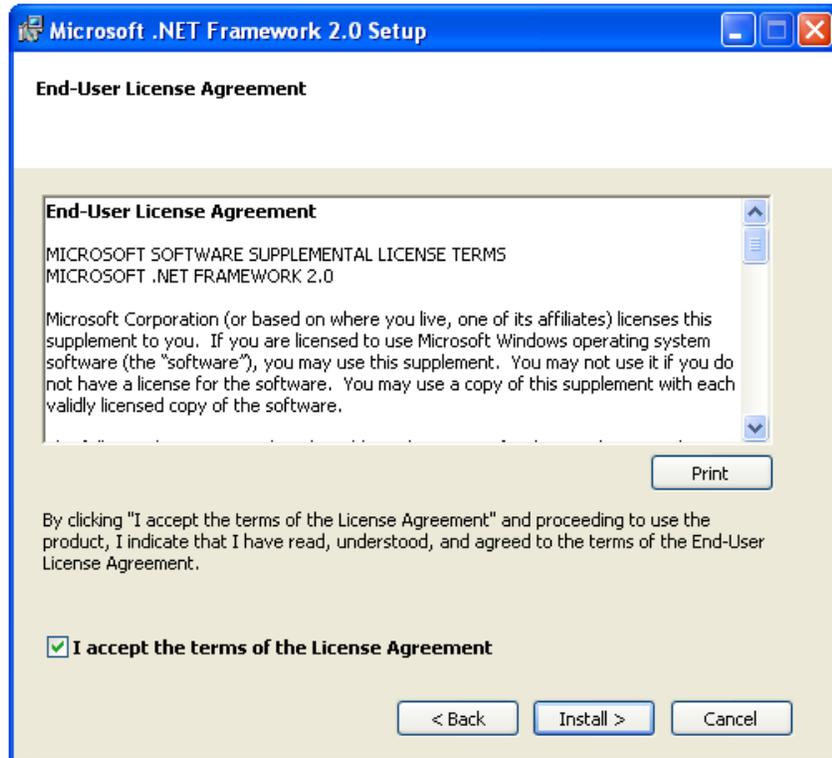
*“Microsoft .NET Framework 2.0 Setup” Wizard*



8. The “Microsoft .NET Framework 2.0 End User License Agreement” is displayed. You can print the agreement by clicking the **Print** button

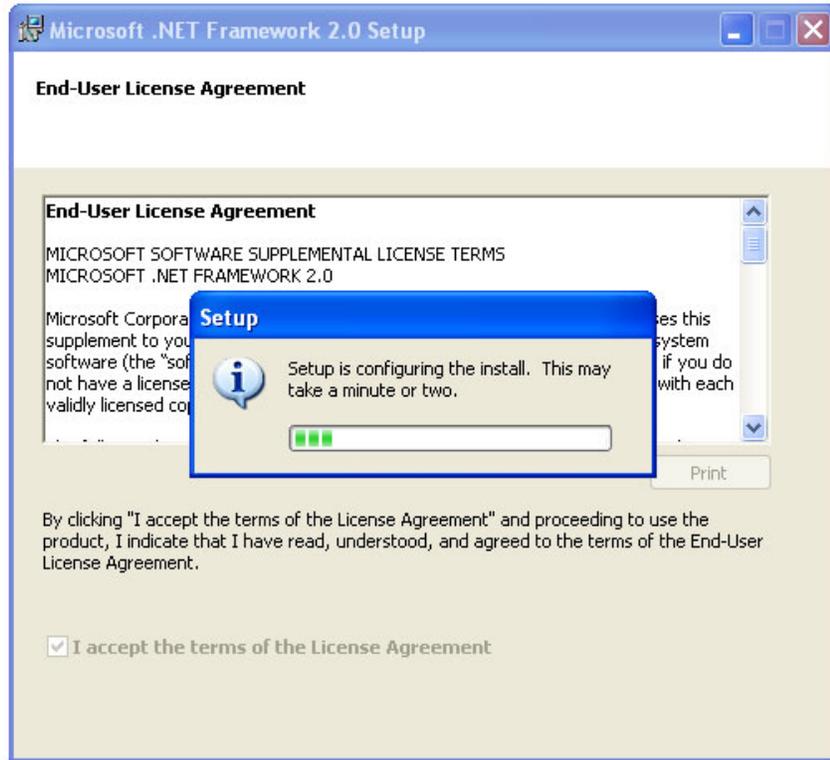
and accept the agreement by clicking **I accept the terms of the License Agreement**. Click **Install** to start the installation.

*“Microsoft .NET Framework License Agreement” Window*



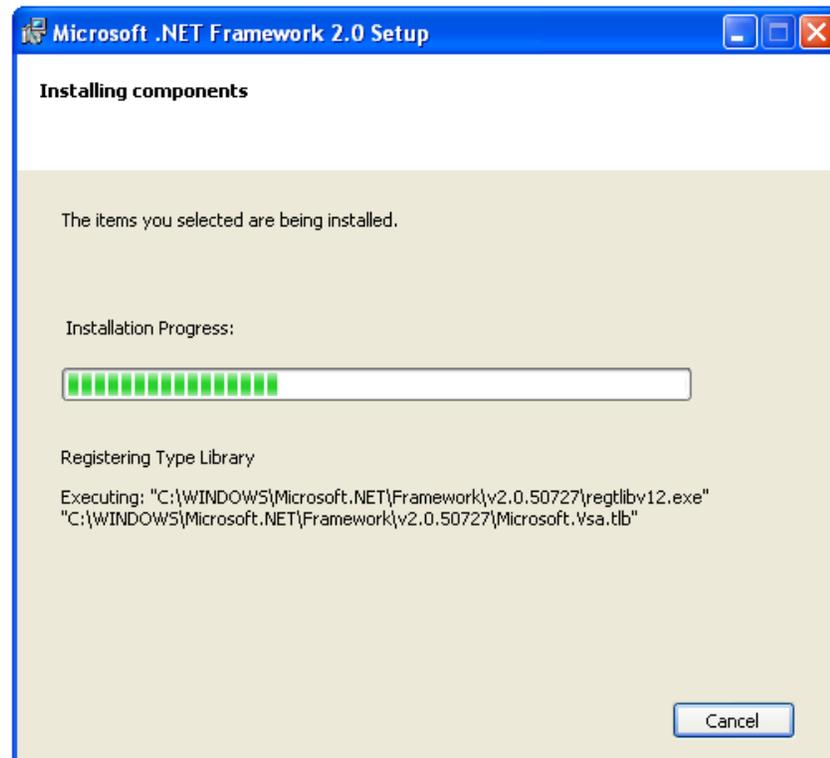
9. Setup will begin configuring the .NET installation.

*“Setup” Progress Bar*



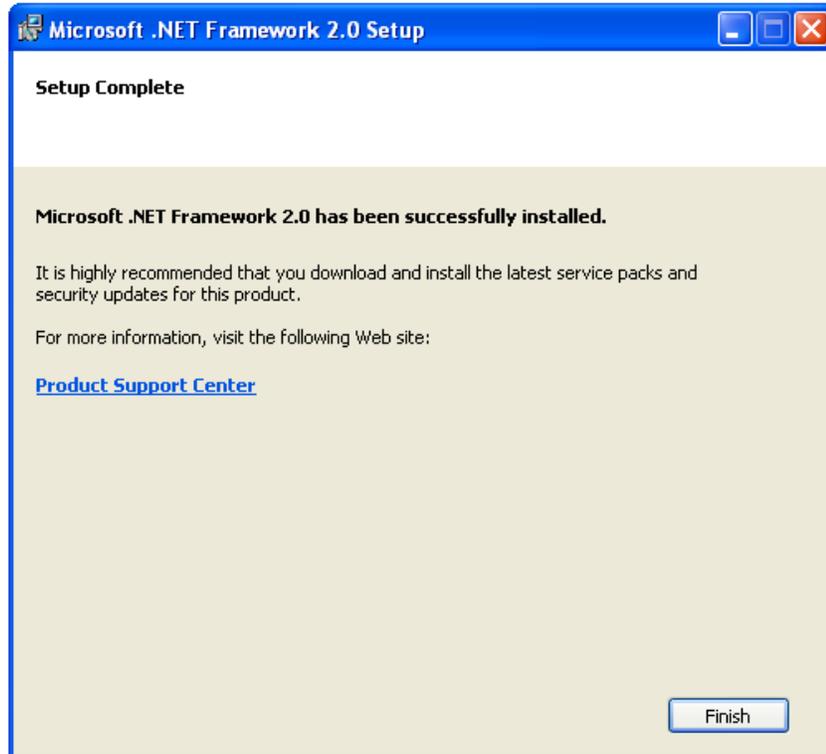
10. Once setup is configured, the following progress window is displayed.

*“Microsoft.NET Framework 2.0 Setup Install Progress” Window*



11. When the installation has completed, “Microsoft .NET Framework 2.0 Setup Complete Window” will display. Click **Finish** to continue with the Report Viewer installation.

*“Microsoft.NET Framework 2.0 Setup Complete” Window*

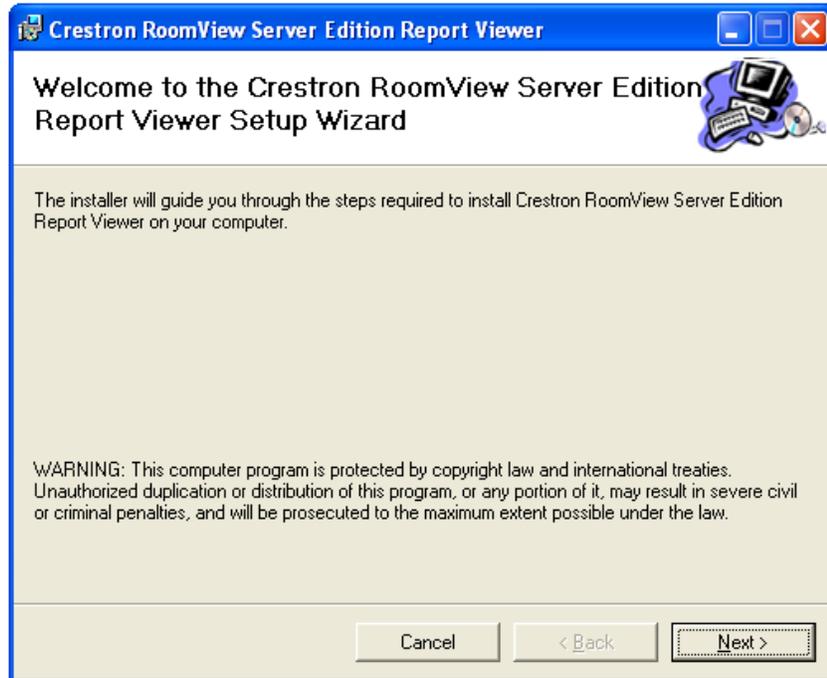


### **Report Viewer Setup**

The Report Viewer installation must be manually restarted at this point. Navigate to and double-click the installer file as you did in Installation Procedure. The first three windows displayed will open and must be clicked through. When that is accomplished, the Crestron RoomView SE Report Viewer Setup wizard will appear.

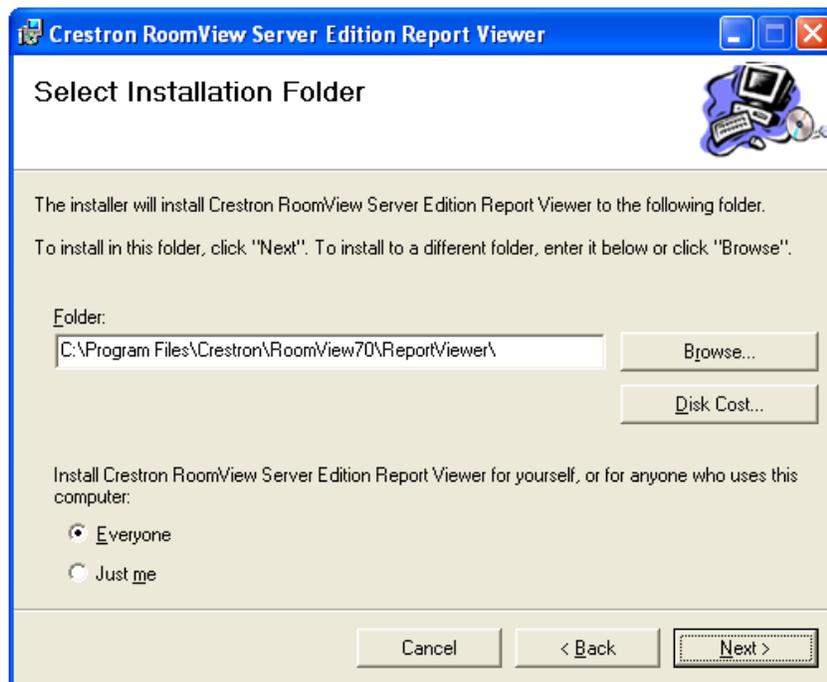
1. When the Report Viewer Setup wizard opens, click **Next** to start the installation.

*“Report Viewer Setup” Wizard*



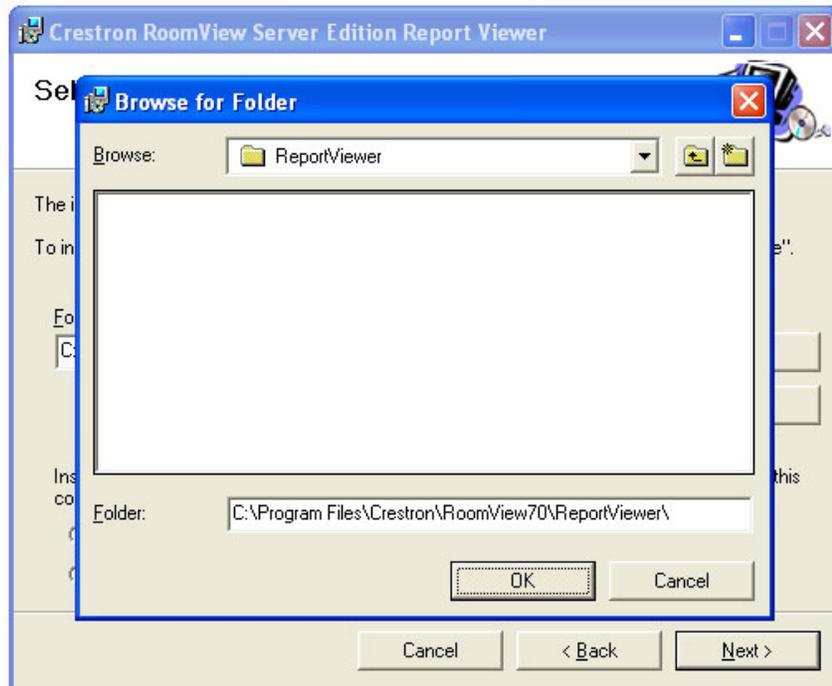
2. The “Select Installation Folder” window allows you to choose the installation path via the **Browse** button, determine the amount of required disk space for the installation using the **Disk Cost** button and specify who will have access to the Report Viewer via the **Everyone** or **Just me** radio buttons.

*“Select Installation Folder” Window*



3. Clicking the **Browse** button opens a browse box that lets you choose a custom destination for the install. Once you have done so, click **OK**.

*“Report Viewer Browse” Window*



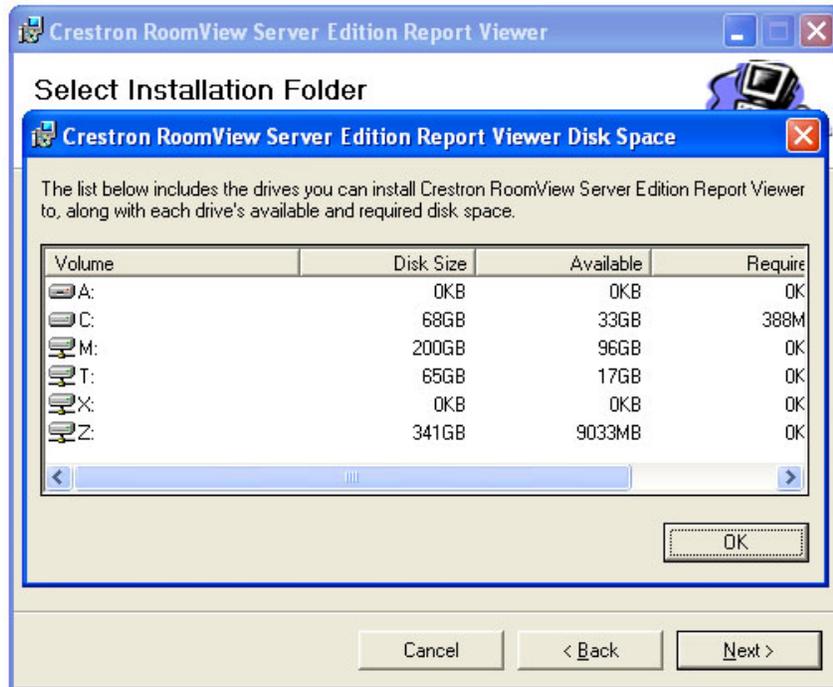
4. Clicking the **Disk Cost** button opens the “Report Viewer Disk Space” window. Use it to determine the best target for your installation. Click **OK** to close the window, browse to the desired drive and directory and then click **Next** to continue Report Viewer installation.

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**NOTE:** The **Disk Cost** button is provided as a way for you to determine the amount of available disk space on the local and networked drives where the Report Viewer can be installed.

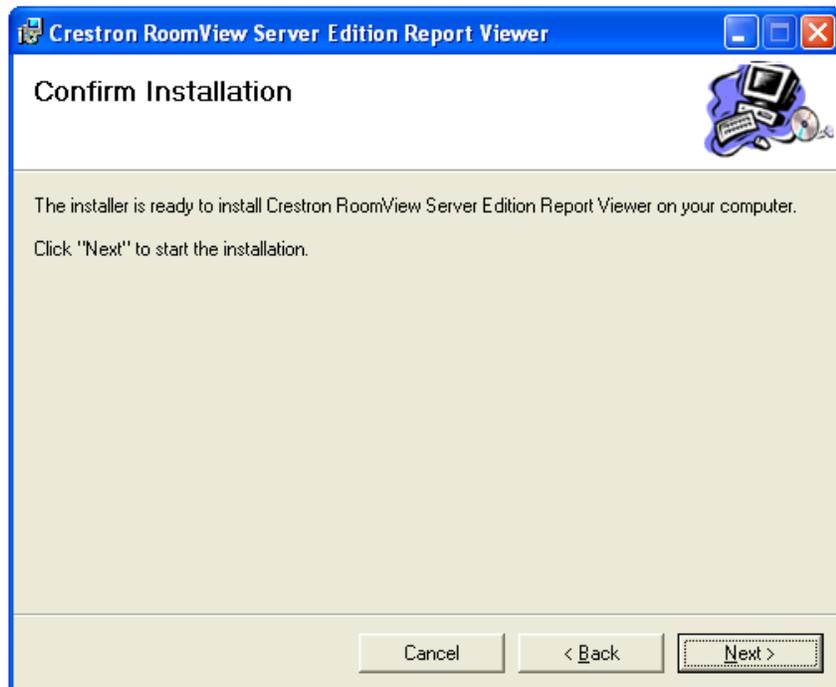
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*“Report Viewer Disk Space” Window*

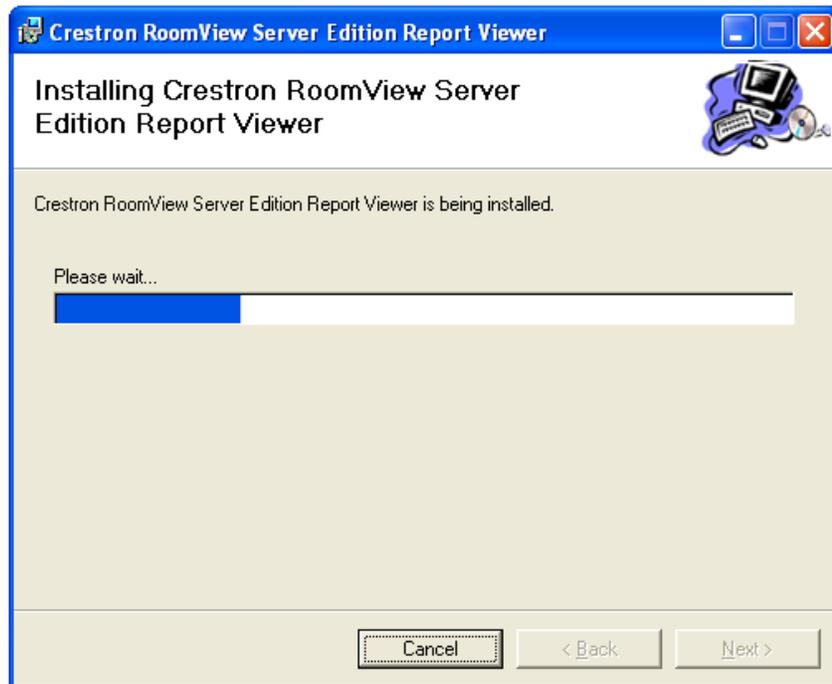


5. The “Confirm Installation” window is displayed to inform you that the Report Viewer Installer wizard is ready to install the Report Viewer on your system. Clicking **Next** initiates the installation.

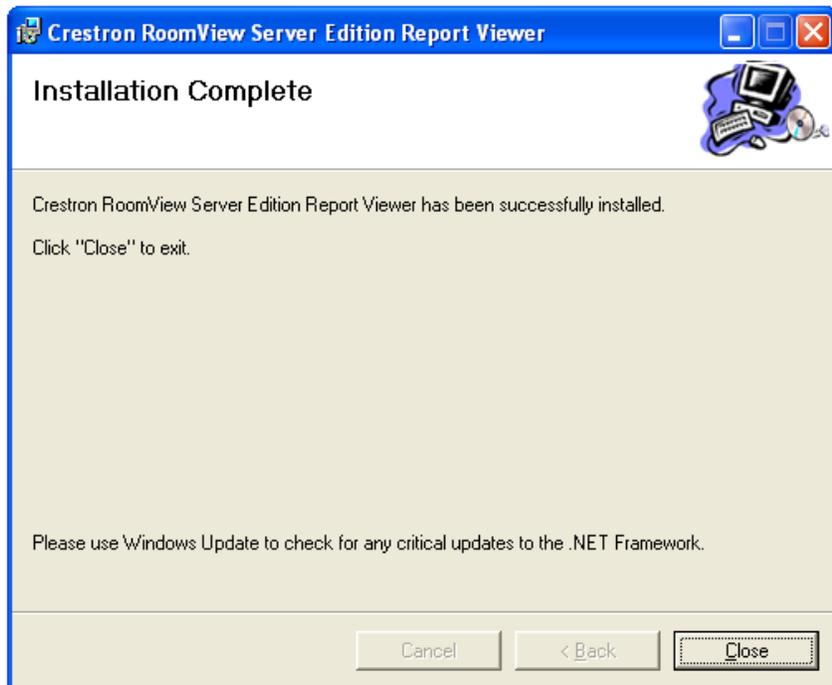
*“Confirm Installation” Window*



6. The “Installing Report Viewer” window will display a progress bar as the installation proceeds.

*“Installing Report Viewer” Window*

7. The “Installation Complete” window will display. Click **Close** to exit.

*“Installation Complete” Window*

## Configuration Manager Setup

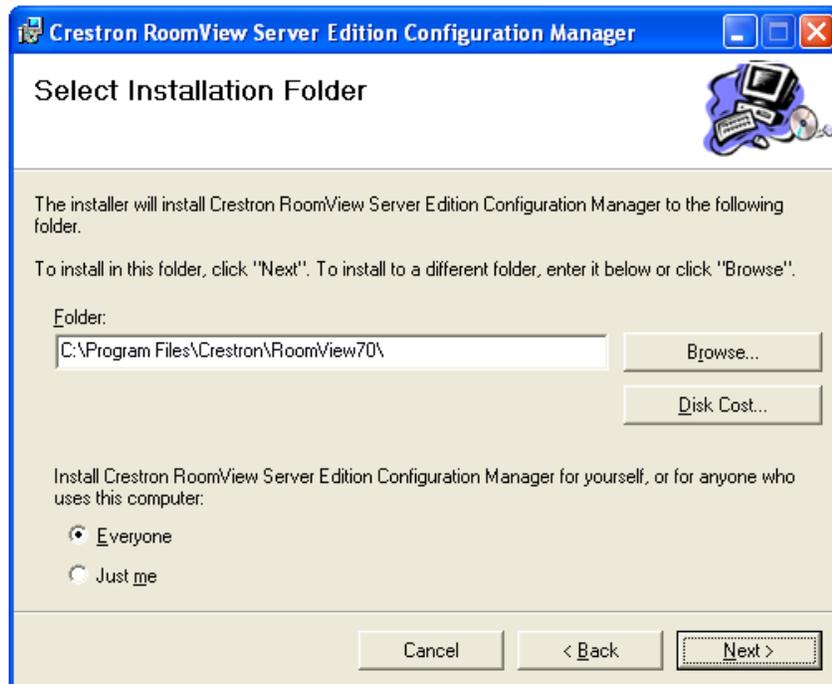
The Configuration Manager provides a way to view, modify and store configuration settings that allow Report Viewer to interact with the databases and services it needs to generate reports. The Configuration Manager Setup wizard starts automatically upon completion of the Report Viewer Setup wizard.

1. When the Configuration Manager Setup wizard opens, click **Next** to start the installation.

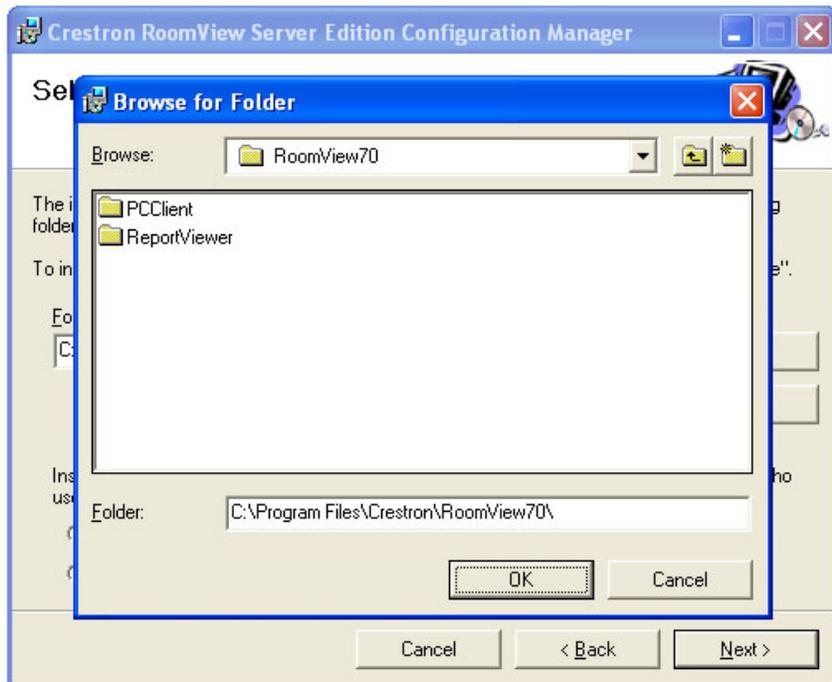
### “Configuration Manager Setup” Wizard



2. The “Select Installation Folder” window allows you to choose the installation path via the **Browse** button, determine the amount of required disk space for the installation using the **Disk Cost** button and specify who will have access to the Report Viewer via the **Everyone** or **Just me** radio buttons.

*“Select Installation Folder” Window*

3. Clicking the **Browse** button opens a browse box that lets you choose a custom destination for the install. Once you have done so, click **OK**.

*“Configuration Manager Browse” Window*

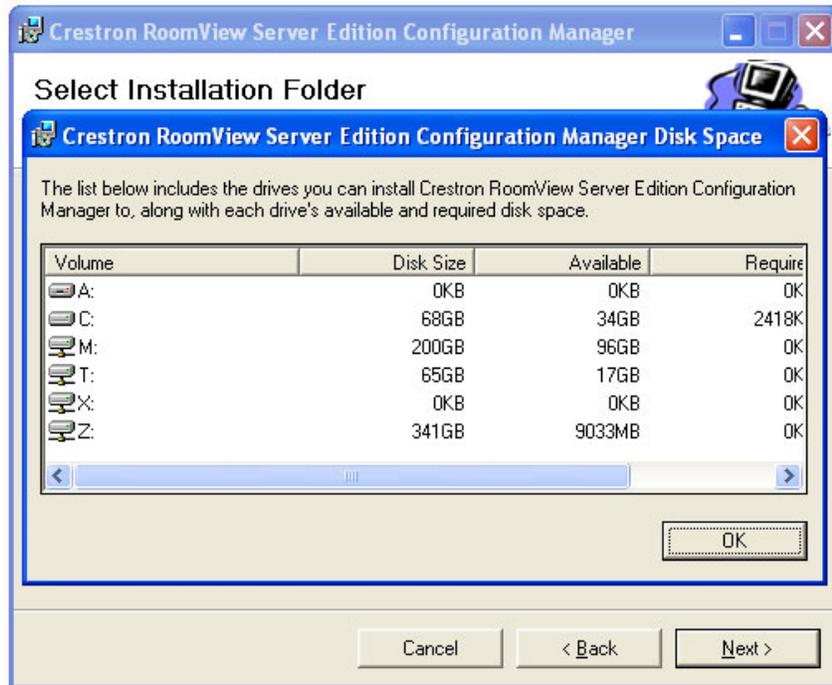
- Clicking the **Disk Cost** button opens the “Configuration Manager Disk Space” window. Use it to determine the best target for your installation. Click **OK** to close the window, browse to the desired drive and directory and then click **Next** to continue the Configuration Manager installation.

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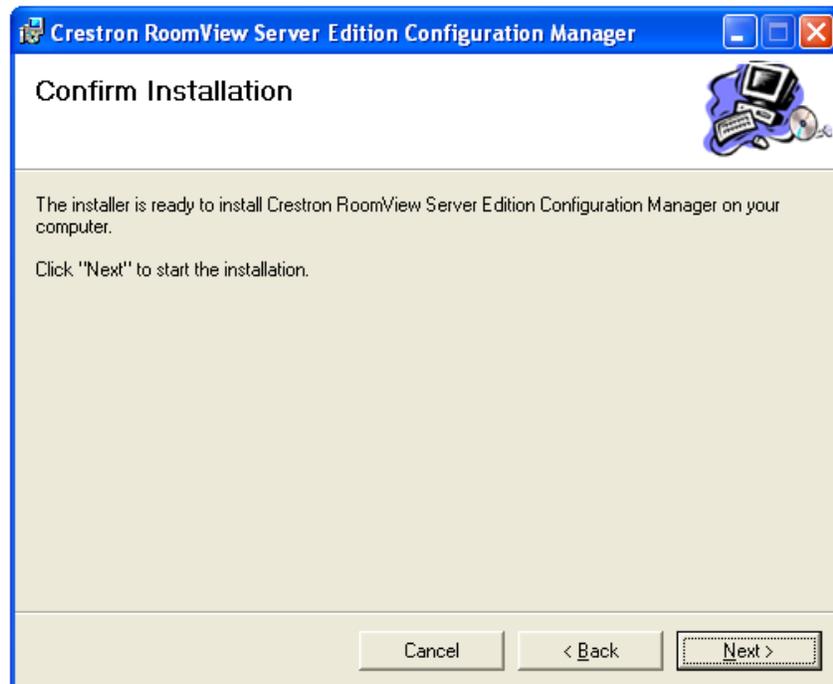
**NOTE:** The **Disk Cost** button is provided as a way for you to determine the amount of available disk space on the local and networked drives where the Database Creation wizard can be installed.

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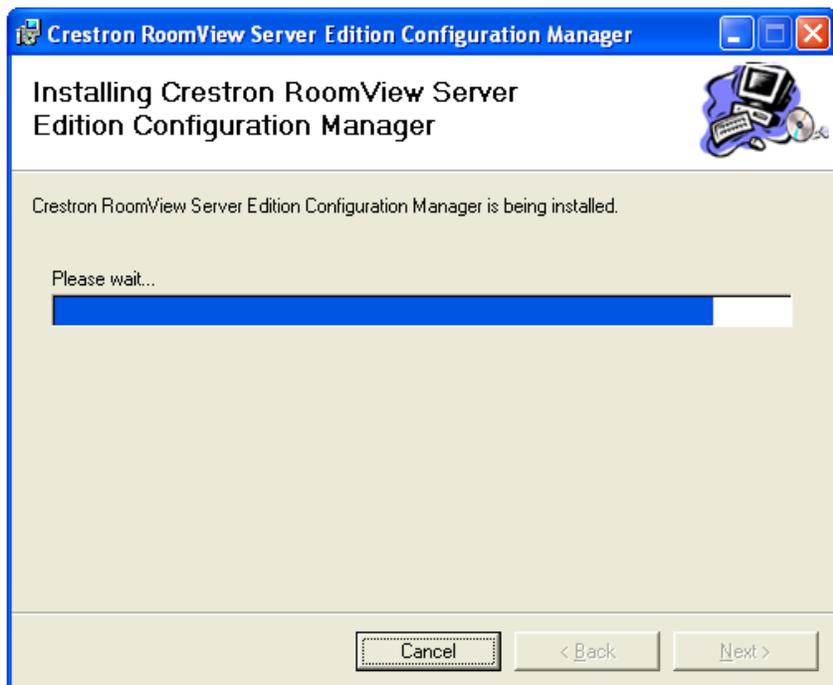
*“Configuration Manager Disk Space” Window*



- The “Confirm Installation” window is displayed to inform you that the Configuration Manager Setup wizard is ready to install the Configuration Manager on your system using the settings you chose. Clicking **Next** initiates the installation.

*“Confirm Installation” Window*

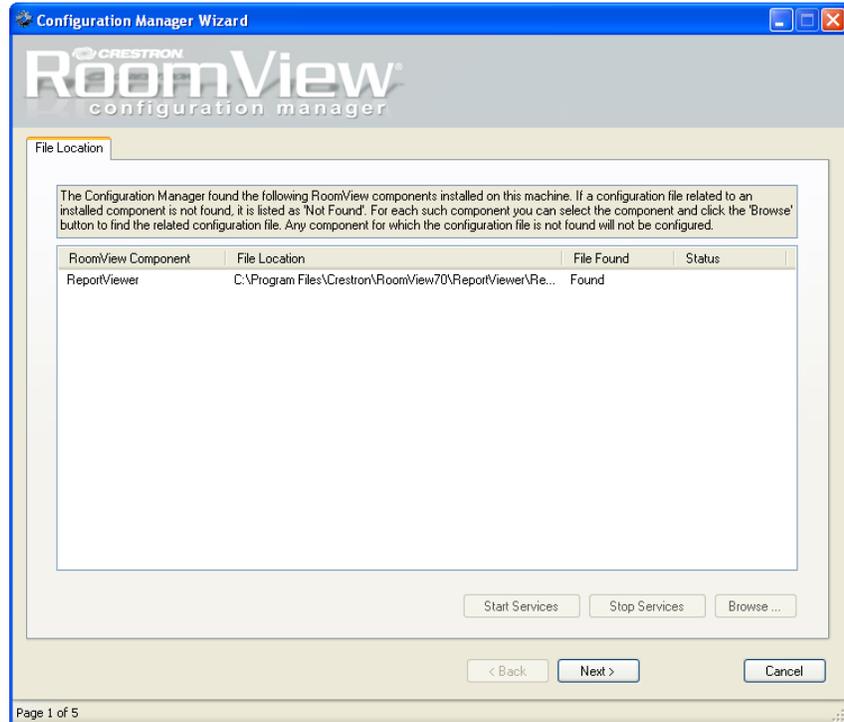
6. The “Installing Configuration Manager” window will display a progress bar as the installation proceeds.

*“Installing Configuration Manager” Window*

7. Once installed, the RoomView Configuration Manager wizard opens automatically to help you to set up your installation. The first tab to open is the *File Location* tab. If RoomView or Report Viewer

components are installed on the machine, they will be displayed here. If the configuration file for the installed component is not found, it will be listed as “Not Found”. In that case, click on the displayed component and use the **Browse** button to navigate to the file.

*“RoomView Configuration Manager” – File Location Tab*



8. The RoomView Configuration Manager – *IP Address and Port Numbers* tab will open showing all fields grayed out except the *Authorization Service* field. Enter the *IP Address/Hostname* and *Port Number* of the Authorization Service on your network. Click **Next** to continue.

**“RoomView Configuration Manager” – IP Address and Port Number Tab**

The screenshot shows the 'Configuration Manager Wizard' window for RoomView configuration. The title bar reads 'Configuration Manager Wizard'. The main header features the 'CRESTRON RoomView configuration manager' logo. The current tab is 'IP Address and Port Numbers'. The interface is divided into six service configuration sections, each with an 'IP Address/Hostname' and 'Port Number' field:

- Room Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65200
- Asset Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65203
- Email Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65202
- Log Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65204
- Schedule Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65201
- Authorization Service:** IP Address/Hostname: 127.0.0.1, Port Number: 65205

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'. The status bar at the bottom left indicates 'Page 2 of 10'.

9. The RoomView Configuration Manager – *Security Web Service* tab opens as shown below. Enter the URL for the Security Web Service in your RoomView installation. When you have entered the URL, click **Next** to continue.

**“RoomView Configuration Manager” – Security Web Service Tab**

The screenshot shows the 'Configuration Manager Wizard' window for RoomView configuration. The title bar reads 'Configuration Manager Wizard'. The main header features the 'CRESTRON RoomView configuration manager' logo. The current tab is 'Security Web Service'. The interface prompts the user to 'Enter the URL for the security web service:' with a text input field containing the URL: `http://127.0.0.1/RoomViewSecurityWebService/crvsecuritywebservice.asmx`. At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'. The status bar at the bottom left indicates 'Page 3 of 10'.

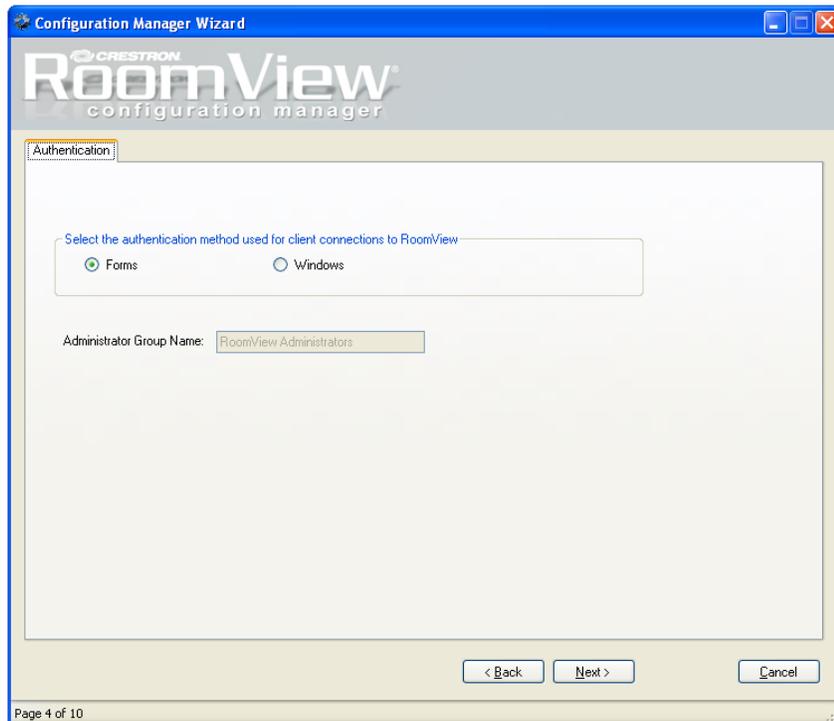
10. The RoomView Configuration Manager – *Authentication* tab will open allowing you to set your local installation of Report Viewer to match the authentication method used by your installation of RoomView Server Edition. **Forms** is selected by default. Click **Next** to continue.

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**CAUTION:** Check with your RoomView system administrator for the correct authentication method in your installation. Choosing an authentication method other than that used by RoomView Server Edition may open security vulnerabilities in your system.

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**“RoomView Configuration Manager” – Authentication Tab**



11. The RoomView Configuration Manager – *Report Viewer* tab is the last tab to open. Enter the IP Address/Hostname where the RoomView database is installed and the catalog name of the database in the appropriate fields. Then, select the appropriate database login authentication method (Windows or SQL). Click **Finish** to continue.

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**NOTE:** If **Windows** is selected as the database login authentication method, RoomView will automatically use your normal Windows username and password. If **SQL** is selected a username and password recognized by the SQL RoomView database must be entered. The default is “sa” for both the username and password.

**NOTE:** If Report Viewer is installed on the RoomView Server Edition server, the *Use the same database information as specified for the service and/or client* check box will be enabled and will set the Report Viewer connection parameters to match the connection parameters of the services. If Report Viewer is installed on a separate client PC, this check box will not be enabled.

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**NOTE:** If Report Viewer is installed on the RoomView Server Edition server, changing the authentication method will change the authentication method for all client applications, including the RoomView Server Edition web interface. If it become necessary to change authentication method, refer to “Authentication Tab” under “Configuring RoomView” in the latest version of the RoomView Server Edition Installation Guide (Doc. 6543), which is available from the Crestron website ([www.crestron.com/manuals](http://www.crestron.com/manuals)).

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**“RoomView Configuration Manager” – Report Viewer Tab**

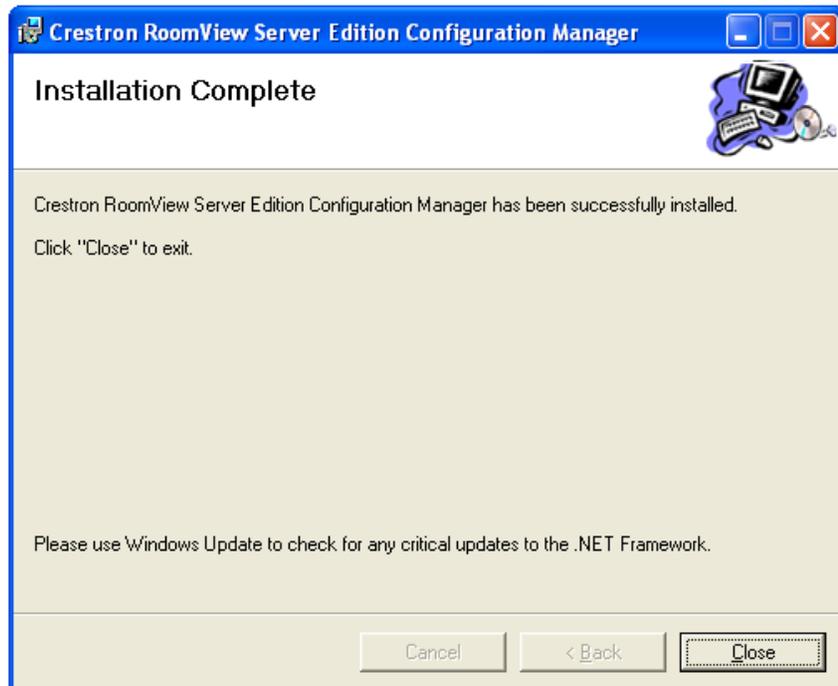
The screenshot shows the 'Configuration Manager Wizard' window for the 'Report Viewer' tab. The window title is 'Configuration Manager Wizard'. The main content area is titled 'Report Viewer' and contains the following fields and options:

- Use the same database information as specified for the service and/or client
- Database Information**
  - Enter the IP Address/Hostname where the RoomView database is installed: 172.30.191.151
  - Enter the catalog name of the database: crestronroomview
- Database Login**
  - Windows Authentication
  - SQL Server Authentication
  - Username (can be limited to read-only access): sa
  - Password: [redacted]

At the bottom of the wizard, there are three buttons: '< Back', 'Finish', and 'Cancel'. The status bar at the bottom left indicates 'Page 5 of 5'.

12. The “Installation Complete” window will display. Click **Close** to exit.

*“Installation Complete” Window*



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## Appendix: Setting RoomView Server Edition Security Policy for Creating Reports

In order to create reports you must be part of an allowed security group in the RoomView Server Edition web client Report Utility. To add your group, proceed as described below.

1. In the RoomView Server Edition web client, click on **Setup**.
2. Under the *QuickStart* tab, click the **Manage** link next to *Security Policies*.
3. Be sure that the **Functional Policies** radio button in the *Step 1: Select policy to view* field is selected and click the **Edit** button on the *Report Utility* row.
4. Locate and select your security group in the *Security Groups* field on the left side of the page.
5. Click the **Add** button and your group will be added to the *Allowed Security Groups* field at the right.
6. Click **Close** to save your changes and return to the *QuickStart* tab. You can now create reports.

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## Software License Agreement

This License Agreement (“Agreement”) is a legal contract between you (either an individual or a single business entity) and Crestron Electronics, Inc. (“Crestron”) for software referenced in this guide, which includes computer software and as applicable, associated media, printed materials and “online” or electronic documentation (the “Software”).

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CRESTRON shall not be liable to honor warranty terms if the product has been used in any application other than that for which it was intended or if it as been subjected to misuse, accidental damage, modification or improper installation procedures. Furthermore, this warranty does not cover any product that has had the serial number or license code altered, defaced, improperly obtained or removed.

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## Return and Warranty Policies

### Merchandise Returns / Repair Service

1. No merchandise may be returned for credit, exchange or service without prior authorization from CRESTRON. To obtain warranty service for CRESTRON products, contact an authorized CRESTRON dealer. Only authorized CRESTRON dealers may contact the factory and request an RMA (Return Merchandise Authorization) number. Enclose a note specifying the nature of the problem, name and phone number of contact person, RMA number and return address.
2. Products may be returned for credit, exchange or service with a CRESTRON Return Merchandise Authorization (RMA) number. Authorized returns must be shipped freight prepaid to CRESTRON, 6 Volvo Drive, Rockleigh, N.J. or its authorized subsidiaries, with RMA number clearly marked on the outside of all cartons. Shipments arriving freight collect or without an RMA number shall be subject to refusal. CRESTRON reserves the right in its sole and absolute discretion to charge a 15% restocking fee plus shipping costs on any products returned with an RMA.
3. Return freight charges following repair of items under warranty shall be paid by CRESTRON, shipping by standard ground carrier. In the event repairs are found to be non-warranty, return freight costs shall be paid by the purchaser.

### CRESTRON Limited Warranty

CRESTRON ELECTRONICS, Inc. warrants its products to be free from manufacturing defects in materials and workmanship under normal use for a period of three (3) years from the date of purchase from CRESTRON, with the following exceptions: disk drives and any other moving or rotating mechanical parts, pan/tilt heads and power supplies are covered for a period of one (1) year; touchscreen display and overlay components are covered for 90 days; batteries and incandescent lamps are not covered.

This warranty extends to products purchased directly from CRESTRON or an authorized CRESTRON dealer. Purchasers should inquire of the dealer regarding the nature and extent of the dealer's warranty, if any.

CRESTRON shall not be liable to honor the terms of this warranty if the product has been used in any application other than that for which it was intended or if it has been subjected to misuse, accidental damage, modification or improper installation procedures. Furthermore, this warranty does not cover any product that has had the serial number altered, defaced or removed.

This warranty shall be the sole and exclusive remedy to the original purchaser. In no event shall CRESTRON be liable for incidental or consequential damages of any kind (property or economic damages inclusive) arising from the sale or use of this equipment. CRESTRON is not liable for any claim made by a third party or made by the purchaser for a third party.

CRESTRON shall, at its option, repair or replace any product found defective, without charge for parts or labor. Repaired or replaced equipment and parts supplied under this warranty shall be covered only by the unexpired portion of the warranty.

Except as expressly set forth in this warranty, CRESTRON makes no other warranties, expressed or implied, nor authorizes any other party to offer any warranty, including any implied warranties of merchantability or fitness for a particular purpose. Any implied warranties that may be imposed by law are limited to the terms of this limited warranty. This warranty statement supersedes all previous warranties.

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**Crestron Electronics, Inc.**  
15 Volvo Drive Rockleigh, NJ 07647  
Tel: 888.CRESTRON  
Fax: 201.767.7576  
[www.crestron.com](http://www.crestron.com)

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