Installation Guide
Marshal Reporting Console
March, 2009

Contents

Marshal Reporting Console is a server-based tool that allows you to create reports on MailMarshal SMTP and WebMarshal system activity, threats, and blocked or quarantined items.

This document provides information about supported environments and prerequisites, as well as instructions for installation of the product.

For usage instructions, see the product Help. For late-breaking information and change history, see the Release Notes included with the product.

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Introduction

Marshal Reporting Console is a server-based tool that allows you to create reports on MailMarshal SMTP and WebMarshal system activity, threats, and blocked or quarantined items.

Supported Installation Types

You can install Marshal Reporting Console in a number of scenarios. Marshal suggests type 1 below as a free solution for small installations. Type 2 or 3 below can be used by larger organizations that have the appropriate infrastructure and SQL Server licenses.

You can **upgrade** seamlessly from MailMarshal Reporting Console (2.0.1.x) to Marshal Reporting Console. For more information about upgrading, see the Release Notes.

1. **Standalone Server Installation (SQL Express Advanced 2005 or 2008):**
   - Install IIS, SQL Express Advanced Edition with Reporting Services and Marshal Reporting Console on a single server.
     - This server could be the intranet web server.
     - The MailMarshal SMTP and/or WebMarshal logging databases can be hosted on this or another database server.
     - The MailMarshal Spam Quarantine Management and Web Administration Console could be installed on the same server.
   - **Advantages:** No cost for SQL Server software. Simplified installation and configuration (no configuration of Reporting Services required).
   - **Disadvantages:** SQL Express does not support abort of running reports. SQL Express supports limited export formats (PDF and Excel only). SQL Express Advanced must be installed as a package; you cannot add SQL Reporting Services to an existing SQL Express installation. *(However, it may be possible to install SQL Express Advanced as a second instance on a server that already has SQL Express installed.)*

2. **Standalone Server Installation (SQL Server 2005 or 2008):**
   - Install IIS, SQL Server, SQL Reporting Services, and Marshal Reporting Console on a single server.
     - This server could also host the MailMarshal SMTP and/or WebMarshal logging databases.
     - This server could host other IIS applications such as the MailMarshal Spam Quarantine Management and Web Administration Console (load permitting).
   - **Advantages:** Full range of features. Single SQL server for all databases. Simplified installation and configuration of Reporting Services (when SQL Server and SSRS are installed at the same time, a default configuration is created).
   - **Disadvantages:** License required for SQL Server and SQL Reporting Services.

3. **Separate Server Installation (SQL Server 2005 or 2008):**
   - Install SQL Server on one server.
     - The MailMarshal SMTP and/or WebMarshal logging databases can be hosted on this or another database server.
   - Install IIS, SQL Reporting Services, and Marshal Reporting Console on another server.

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- This server could be the intranet web server. The MailMarshal Spam Quarantine Management and Web Administration Console could be installed on the same IIS server.
  - o **Advantages:** Full range of features. Single SQL server for all databases.
  - o **Disadvantages:** License required for SQL Server and SQL Reporting Services. Some manual configuration of Reporting Services is required.

Hardware Prerequisites

The following are hardware prerequisites for the Marshal Reporting Console installation. Note that if Reporting Console databases are installed on the same computer as the MailMarshal SMTP and/or WebMarshal logging databases, the requirements for the product databases must also be considered. For information about MailMarshal SMTP and WebMarshal database sizing, see the *User Guide* for each product.

- Pentium, 3GHz

- 2 GB RAM

- Free disk space to support databases (10 GB free recommended)

- If installing standalone, SQL Express requires a minimum of 600 MB of free disk space for installation (in addition to database storage space)

Software Prerequisites

The following are software prerequisites for the Marshal Reporting Console installation. Note that if Reporting Console is installed on the same computer as SQL Server, the SQL Server requirements must also be considered.

- Windows Server 2008, 32 or 64 bit versions (installed as a 32 bit application)

- Windows Vista Business or Ultimate, SP1, 32 or 64 bit versions (installed as a 32 bit application)

- Windows Server 2003, SP1 or above (32 bit versions)

- Windows XP, SP2 or above (32 bit versions)

- SQL Server 2005 with SP2, SQL Server 2005 Express Advanced Edition with SP2, SQL Server 2008, or SQL Server 2008 Express Advanced Edition
  - o Mixed Mode authentication enabled.

- Internet Information Services 5.1 or above

- .NET Framework 3.5 SP1

- The Marshal Reporting Console installer automatically installs the Microsoft Report Viewer.

- Supported browsers (for client workstations):
  - o Internet Explorer 6 or above

    Note: To successfully connect to the MRC site using Internet Explorer from a computer running Windows Server 2003 or above, **uninstall** Internet Explorer Enhanced Security Configuration (IEESC) on the computer you are browsing from. IEESC blocks active content such as the ASP.NET code used by MRC. This behavior is by design. Adding the MRC site to "safe sites" may not resolve all issues created by IEESC.

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> If you cannot uninstall IEESC, browse from another workstation, or use another browser such as Firefox.

- o Firefox 2.0 *(2.0.0.12 or above)*

Installation Procedures

Installation varies depending on the selected installation type.

Permissions

The SQL Report Server application requires write access to the Temporary ASP.NET files folder (by default, a path like `C:\WINDOWS\Microsoft.NET\Framework\V2.0.050727\Temporary ASP.NET Files`). The .NET framework installer included with SQL Reporting Services correctly sets this permission for the Network Service account. SQL Express Advanced also correctly sets this permission. **However** if you previously installed .NET framework, and then install SQL Reporting Services, this permission may not be set.

- If you encounter an error referring to permissions on this folder, use Windows Explorer to set the permission. For more information, see this [File Permissions](#) topic from SQL Server Developer Center.

Standalone Installation (SQL Express Advanced)

To install Marshal Reporting Console and SQL Express Advanced on the same server, complete the following steps.

1. Obtain SQL Server Express Edition (2005 SP2 or 2008) with Advanced Services (download from Microsoft).

2. If necessary, obtain .NET Framework 3.5 SP1 (download from Microsoft).

On the target server:

3. Log on to the server as an account with local administrator permissions.

4. Enable IIS (if it is not already enabled). For information about enabling IIS on various Windows versions, see [Appendix: Enabling IIS](#).

5. Install .NET 3.5 SP1.
   Note: You **must** enable IIS before installing the .NET framework. If you do not, SQL Express will not install correctly. For more information and troubleshooting help, see Marshal Knowledge Base article [Q12054](#).

6. Install SQL Express Advanced Edition.
   Note: The SQL Express installation first installs prerequisites and support files. After prerequisites are installed, click **Next** to continue with the installation.

   A. *If you are installing SQL Express 2005 With Advanced Services:*

   - In **Feature Selection,** add Reporting Services.

     Note: Ensure you select the **entire feature** (including Report Manager) as in the screenshot below.

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- Optionally add Management Studio Express.
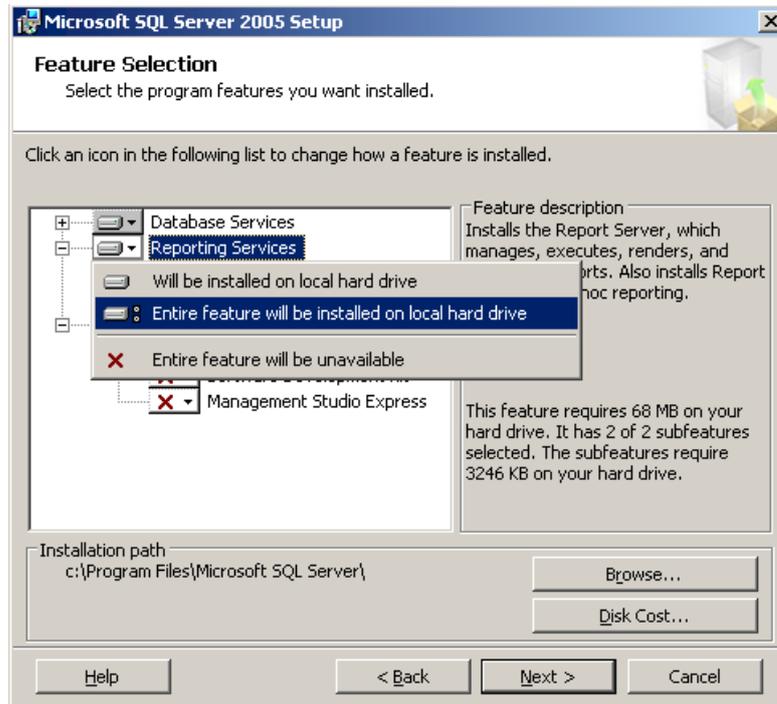
- In **Authentication Mode**, select *Mixed Mode* and enter a strong password for the SA account.
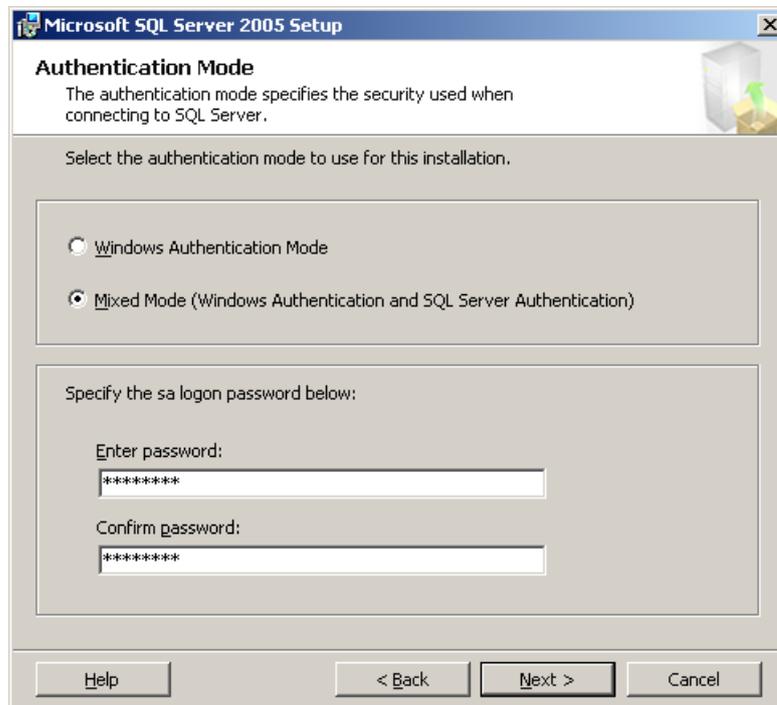
- In **Report Server Installation Options**, select *Install the Default Configuration*.
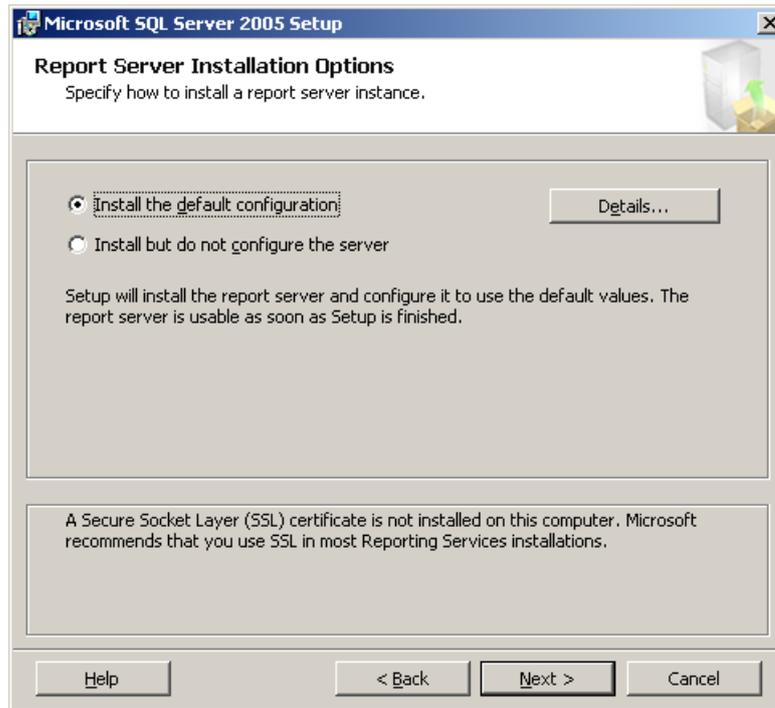
- Complete the wizard. The installation will create a Named Instance called SQLExpress.

  Note: If you are installing on a computer that already has an instance of SQL Express installed, you may have to install a different Named Instance.

B. If you are installing SQL Express 2008 With Advanced Services:

- SQL 2008 requires Windows Power Shell. If this package is not installed, then install it first.

- Accept the default values except as noted below.

- In **Feature Selection,** add Database Engine Services and Reporting Services. Optionally add Management Tools - Basic.

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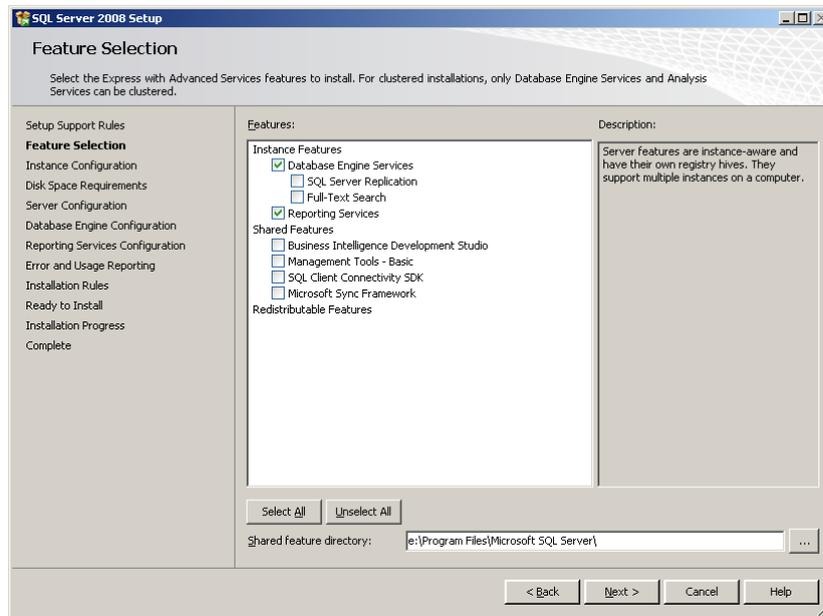
- In **Authentication Mode**, select *Mixed Mode* and enter a strong password for the SA account.
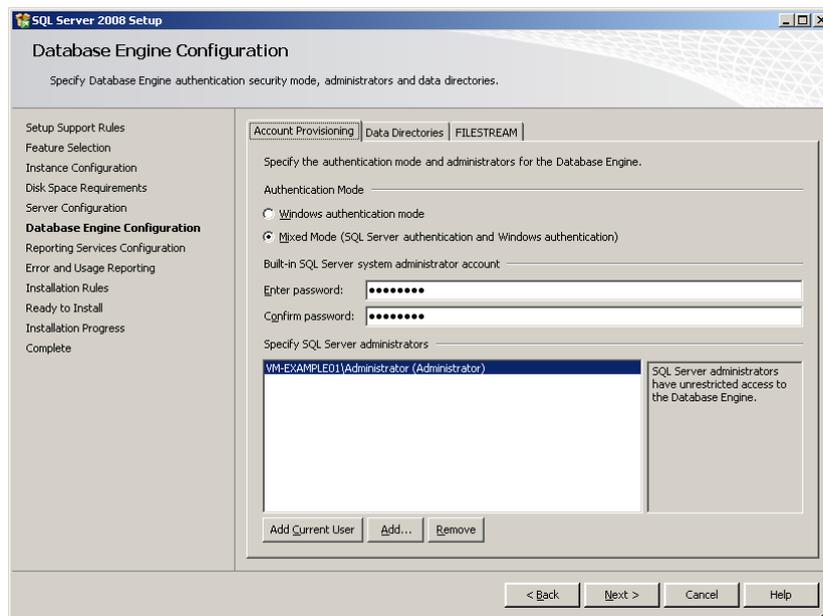
- In **Reporting Services Configuration**, select *Install the Native Mode Default Configuration*.
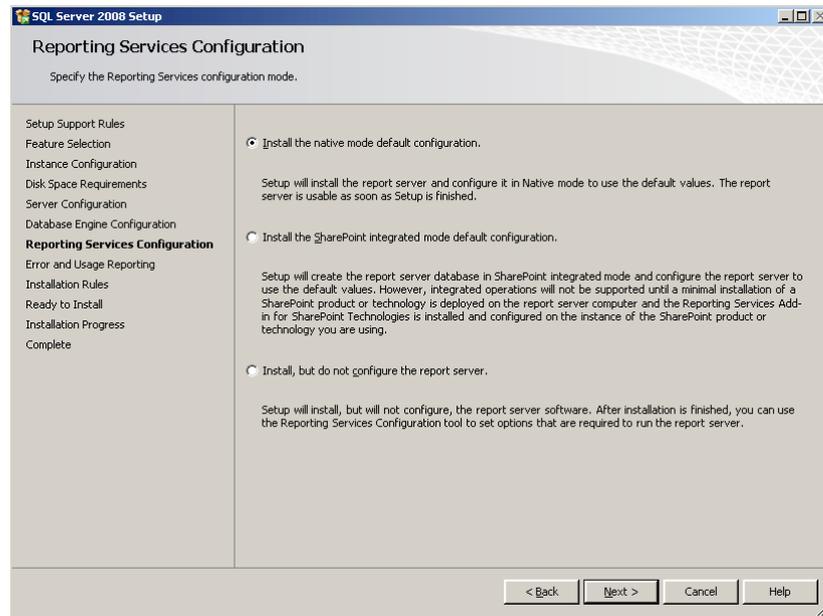
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- Complete the wizard. The installation will create a Named Instance called SQLExpress.

  Note: If you are installing on a computer that already has an instance of SQL Express installed, you may have to install a different Named Instance.

7. Enable TCP/IP for SQL Express.

   A. Navigate to Start>Microsoft SQL Server >Configuration Tools>SQL Server Configuration Manager.

   B. Select **Network Configuration** > Protocols for SQL Express. Enable TCP/IP.
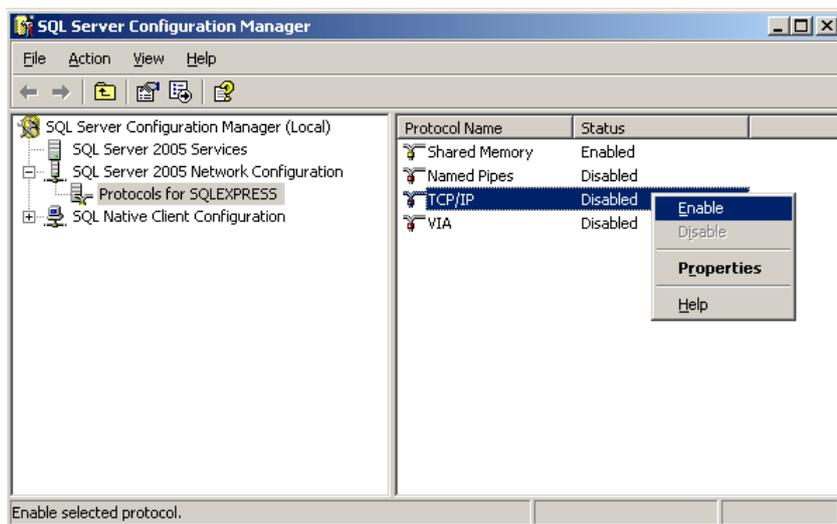
   C. Select **SQL Server Services.**

   D. Start **SQL Server Browser** if it is not running. SQL Server Browser is required to allow connections to named instances.

E. Restart the **SQL Server service** for SQLEXPRESS (or the service name you just installed).
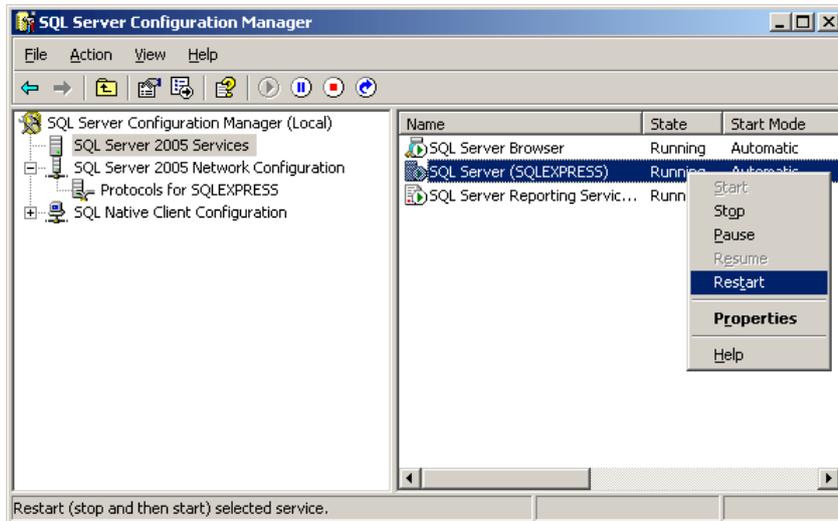
8. Install Marshal Reporting Console.

   A. On the **Setup Type** window, select a Virtual Directory name used to connect to the web application. You can accept the default value.

      Tip: For instance, if the name of the server is `intranetserver` and you accept the default virtual Directory entry, you will connect to the website as `http://intranetserver/MailMarshalReportingConsole/`

   B. On the **Database Server Location** window, if you installed SQL Express with the default configuration, select the database server **localhost\SQLEXPRESS.** If you installed a different named instance, select the instance you installed. (You must use the local SQL Express installation as the database server.) Enter a SQL username and password.

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> **Note:** The user account must be allowed to create databases. To ensure adequate permissions use the SA account.

C. On the **Impersonate User Details** window, enter the Windows account and password that Reporting Console will use for access to local resources. This should be a local administrator. If you plan to add users from the domain environment, this account must also be a domain administrator.

D. On the **Email Configuration** window, enter details of an email server that Marshal Reporting Console will use to deliver reports and administrative messages.

> **Note:** The Sender Email address must be allowed to send mail through the specified server. The address should be valid for delivery and monitored by an administrator.

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You can enter a user name and password for SMTP authentication, if required by the email server.

Click **Test** to verify the details by sending an email.

E. On the **SQL Report Services** window, enter the web address of the SQL Reporting Services website, and enter a deployment folder location. If necessary you can find the path using IIS Manager.
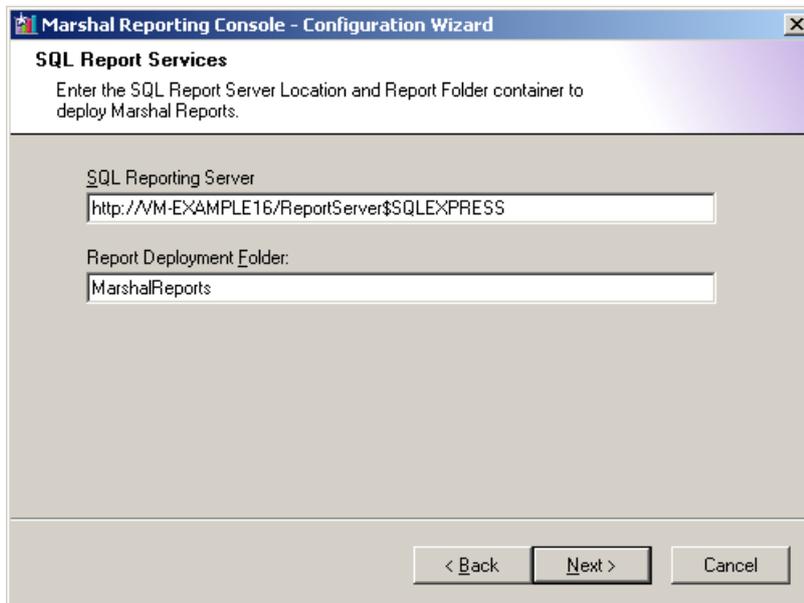
Tip: For instance, if the name of the server is `intranetserver` and you installed SQL Express 2005 with default settings, the entry should be `http://intranetserver/ReportServer$SQLExpress` (for SQL Express 2008, `http://intranetserver/ReportServer_SQLExpress`)

F. On the final window of the wizard, accept the defaults to start services and open the Console in a browser window.

Tip: See the note about Internet Explorer Enhanced Security Configuration in the Software Prerequisites section. To complete configuration, you may need to connect from another workstation.

9. Connect to the Marshal Reporting Console website using an account that is an administrator of the server. On the **Configuration>Databases** tab, add MailMarshal SMTP and/or WebMarshal databases that you want to report on, and users who can access the website. To learn more about the options on this tab, see Help.

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Separate Server Installation (SQL Server 2005 or 2008)

The detailed instructions in this section assume that you have already installed and configured SQL Server and SQL Reporting Services. Marshal Reporting Console is installed on the same computer as SQL Reporting Services.

Marshal has validated the following settings for SQL and Reporting Services in this scenario:

- Enable TCP/IP connections to SQL Server.

- Enable Mixed Mode authentication on SQL Server. Remote connections from the Marshal Reporting Console require SQL authentication.

- Enable SQL Server Browser. This setting allows the Marshal Reporting Console installer to find the SQL Server.

- After installing SQL Reporting Services 2005, you must configure settings using Reporting Services Configuration Manager. The default settings for most options can be used. The Marshal Reporting Console installation will present a window that allows you to configure these items. However, Marshal recommends you ensure that SSRS is initialized before you install MRC.

    Note: If you are using SQL Reporting Services 2008, the SSRS installer pre-configures appropriate settings.

    o **Report Server Virtual Directory:** `ReportServer` on default web site.

    o **Report Manager Virtual Directory:** `Reports` on default web site.

    o **Windows Service Identity:** Service Account: `Local System`.

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- **Web Service Identity:** `NT Authority\Network Service, DefaultAppPool`

- **Database Setup:**
  - Server name: the existing remote SQL Server
  - Database name: `ReportServer`
  - Credentials Type: `SQL Server` - use an account with full privileges. This account must have permission to create databases.

On the target server for Marshal Reporting Console:

1. Install Marshal Reporting Console.

   - On the **Setup Type** window, select a Virtual Directory name used to connect to the web application.

   - On the **Database Server Location** window, click **Refresh** to view a list of available servers.

     Note: Only servers running the SQL Server Browser display in this list.

     Select or enter the details of the remote SQL server. If the server runs multiple SQL instances, you can use the format *servername\instancename.* Enter a SQL username and password. Select TCP/IP connection.

     Note: The user account must be allowed to create databases.

   - On the **Impersonate User Details** window, enter the Windows account and password that Reporting Console will use for access to Windows resources. This should be a local administrator. If you plan to add users from the domain environment, this account must also be a domain administrator.

   - For *SSRS 2005 installations only*, if SSRS configuration is not complete, the **SQL Server Reporting Server Configuration** window displays. On this window, configure SSRS settings. In most cases you can accept the default settings.

   - On the **Email Configuration** window, enter details of an email server that Marshal Reporting Console will use to deliver reports and administrative messages.

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> **Note:** The Sender Email address must be allowed to send mail through the specified server. The address should be valid for delivery and monitored by an administrator.

You can enter a user name and password for SMTP authentication, if required by the email server.

Click **Test** to verify the details by sending an email.

A. On the **SQL Report Services** window, enter the web address of the SQL Reporting Services website, and enter a deployment folder location. If necessary you can find the path using IIS Manager.

> **Tip:** For instance, if the name of the server is `intranetserver` and you installed SQL Server as the default instance, the entry should be `http://intranetserver/ReportServer`

B. On the final window of the wizard, accept the defaults to start services and open the Console in a browser window.

> **Tip:** See the note about Internet Explorer Enhanced Security Configuration in the Software Prerequisites section. To complete configuration, you may need to connect from another workstation.

2. Connect to the Marshal Reporting Console website using an account that is an administrator of the server. On the Configuration tab, add MailMarshal SMTP and/or WebMarshal databases that you want to report on, and users who can access the website. To learn more about the options on this tab, see Help.

Same Server Installation (SQL Server 2005 or 2008)

The detailed instructions in this section assume that you have already installed and configured SQL Server and SQL Reporting Services. Marshal Reporting Console is installed on the same computer as SQL Reporting Services.

Marshal has validated the following settings for SQL and Reporting Services in this scenario:

- Enable TCP/IP connections to SQL Server.

- Enable Mixed Mode authentication on SQL Server.

- Enable SQL Server Browser. This allows the Marshal Reporting Console installer to find the SQL Server.

- When you install Reporting Services at the same time as SQL Server, by default the Reporting Services installation creates appropriate settings. You can review these settings after installation using Reporting Services Configuration Manager. Ensure that Reporting Services is initialized before you install MRC. For information about suggested settings see the "separate server installation" section above.

On the target server for Marshal Reporting Console:

1. Install Marshal Reporting Console.

    o On the **Setup Type** window, select a Virtual Directory name used to connect to the web application.

    o On the **Database Server Location** window, select or enter the server name - do not use (local). If the server runs multiple SQL instances, you can use the format *servername\instancename.*

    Enter a SQL username and password.

    > **Note:** The user account must be allowed to create databases.

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- o On the **Impersonate User Details** window, enter the Windows account and password that Reporting Console will use for access to local resources. This should be a local administrator. If you plan to add users from the domain environment, this account must also be a domain administrator.

- o On the **Email Configuration** window, enter details of an email server that Marshal Reporting Console will use to deliver reports and administrative messages.

  > **Note:** The Sender Email address must be allowed to send mail through the specified server. The address should be valid for delivery and monitored by an administrator.

  You can enter a user name and password for SMTP authentication, if required by the email server.

  Click **Test** to verify the details by sending an email.

- C. On the **SQL Report Services** window, enter the web address of the SQL Reporting Services website, and enter a deployment folder location. If necessary you can find the path using IIS Manager.

  > **Tip:** For instance, if the name of the server is `intranetserver` and you installed SQL Server as the default instance, the entry should be `http://intranetserver/ReportServer`

- D. On the final window of the wizard, accept the defaults to start services and open the Console in a browser window.

  > **Tip:** See the note about Internet Explorer Enhanced Security Configuration in the Software Prerequisites section. To complete configuration, you may need to connect from another workstation.

2. Connect to the Marshal Reporting Console website using an account that is an administrator of the server. On the Configuration tab, add MailMarshal SMTP and/or WebMarshal databases that you want to report on, and users who can access the website. To learn more about the options on this tab, see Help.

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Appendix: Enabling IIS

This section briefly outlines the steps and options required to enable Internet Information Services on supported Windows versions.

Windows Server 2008

1. Open Server Manager (Start>Administrative Tools>Server Manager).

2. Expand **Roles.**

3. Add the Role **Web Server (IIS).**
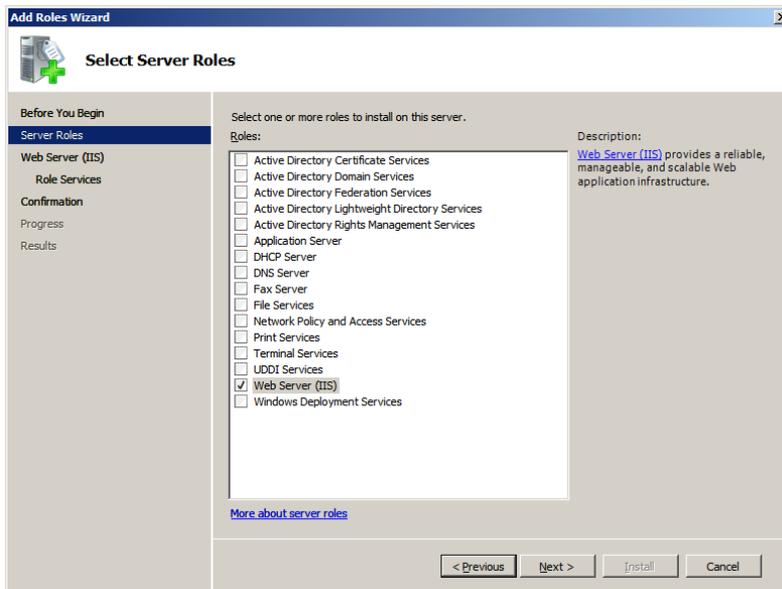
4. On the Select Role Services window, in addition to the defaults, add Role Services **ASP.NET** and **Windows Authentication**.

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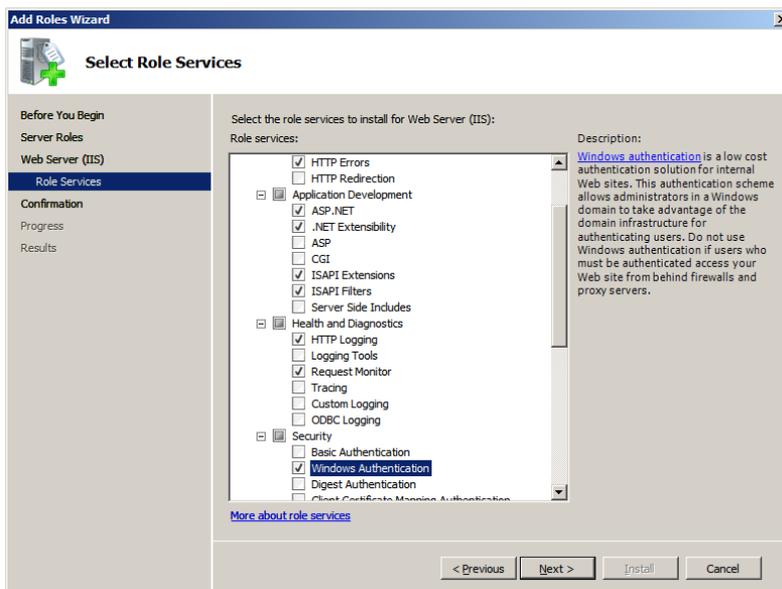
5. Complete the wizard to enable this component.

Windows Vista

1. Navigate to Start>Control Panel>Programs and Features>Turn Windows features on or off.

2. Select **Internet Information Services**.

3. Expand Internet Information Services, expand the required feature sets, and select **ASP.NET** and **Windows Authentication**.
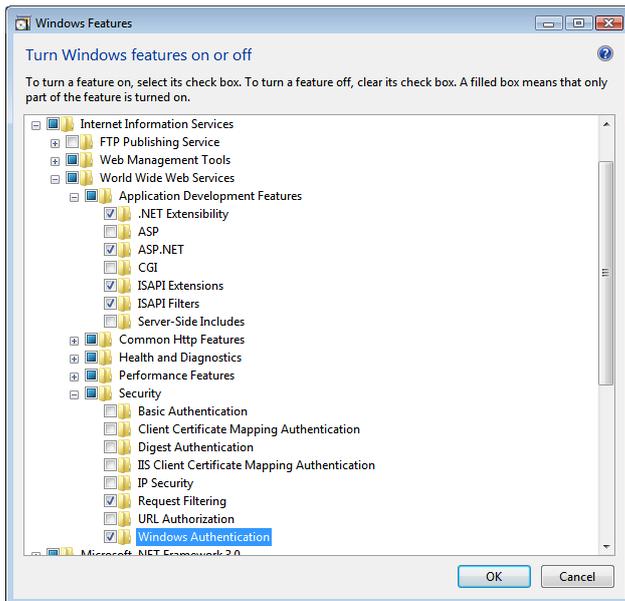
4. Click **OK** to enable this component.

Windows Server 2003

1. Navigate to Start>Control Panel>Add/Remove programs>Add/Remove Windows components.

2. Select **Application Server** (the default limited set of options is all that is required).
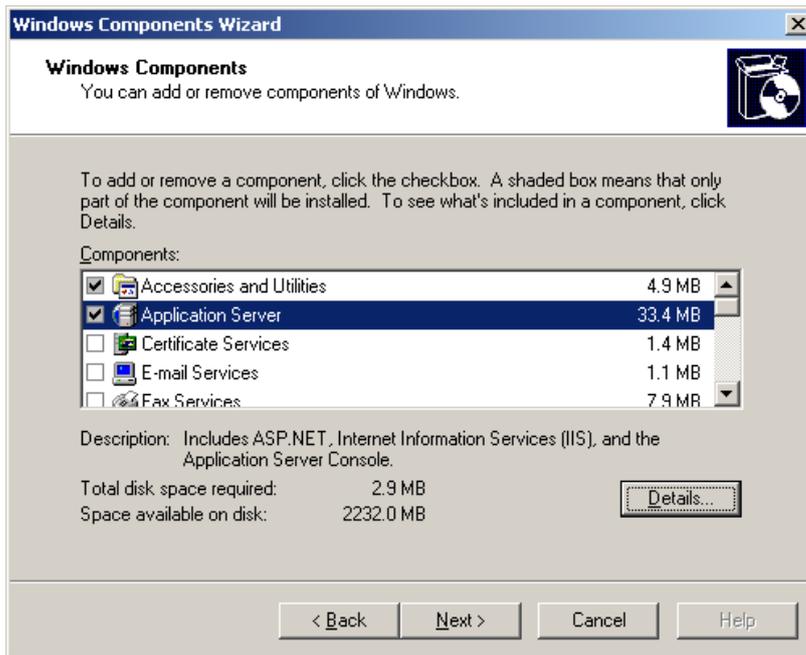
3. Complete the process to enable this component.

Windows XP

1. Navigate to Start>Control Panel>Add/Remove programs>Add/Remove Windows components.

2. Select **Internet Information Services** (the default limited set of options is all that is required).

3. Complete the process to enable this component.

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