



Using SQL Reporting Services with Amicus

Applies to: Amicus Attorney (with or without Amicus Billing)

With Microsoft SQL Server Reporting Services, use Report Builder to generate and author easy-to-use interactive reports. Amicus Billing utilizes SQL Server Reporting Services for both Billing Reports and Billing Templates.

About SQL Server Reporting Services	2
What you need	2
Setting up SQL Server Reporting Services for use with Amicus	2
Step 1 – Installing SQL Server Reporting Services	3
Step 2 – Configuring SQL Server Reporting Services	3
Step 3 – Testing the connection	5
Step 4 – Publishing available Reports and Billing Templates	5
Setting up Firm Members to edit Reports and Billing Templates	5
Running Reports and Billing Templates	6
Authoring and publishing custom Reports and Billing Templates	10
Before you begin	10
Editing the contents of Reports and Billing Templates	10
Editing the name and description of Billing Reports and Templates	13
Adding Custom Fields to Reports or Billing Templates	13
Publishing Reports and Billing Templates	15
Deleting Reports and Billing Templates	16
APPENDIX: Installing SQL Server Reporting Services	19

About SQL Server Reporting Services

Amicus Attorney supports **SQL Server Reporting Services**. This Microsoft server-based report generation system is available as an install option in SQL Server. Amicus users can generate and author easy-to-use *interactive* reports!

Amicus Attorney utilizes SQL Server Reporting Services for Advanced Reports, the Chronology and Shared to Clients views of a File, and the chart in the Statistics view of Time Sheets.

Amicus Billing utilizes these Services for both Billing Reports and Billing Templates.

Reports can be created and edited with **Report Builder** (available as a free download from Microsoft). Report Builder is an authoring tool with Office-like functions—users will instinctively be able to use the formatting functions from the familiar Ribbon. Fields can be added simply via drag-and-drop from the Report Data pane to the design surface.

What you need

To run Reports and Billing Templates*:

- Installed on the Amicus Attorney Application Server:
 - Amicus Attorney Server
- Installed and configured on the Amicus Attorney Database Server:
 - Microsoft SQL Server Reporting Services

* Throughout this Guide, “Templates” refers to Bill and Reminder Statement Templates, applicable to Amicus Billing.

Additional requirements to edit Reports:

For each Firm Member who wishes to edit or author SQL Reports:

- Installed on their workstation:
 - Amicus Attorney Workstation
 - Microsoft SQL Server Report Builder (version compatible with your version of SQL Server Reporting Services)
- Amicus Security rights to edit SQL Reports

Setting up SQL Server Reporting Services for use with Amicus

An Amicus Administrator must set up SQL Server Reporting Services before users can run, edit, or publish SQL Reports and Templates.

If you need assistance with any of these procedures, please contact [Amicus Technical Support](#) at 800-472-2289 or 416-977-6633.

Step 1 – Installing SQL Server Reporting Services

Microsoft SQL Server 2008, 2008 R2, or 2012 Reporting Services must first be installed on the Amicus Database Server for your “AMICUS” SQL instance. Instructions are included in the Appendix to this Guide.



NOTE: If your firm has performed a Runtime SQL Server 2008 R2 or 2012 install for Amicus Attorney 2011 or later, Reporting Services will likely already be installed (as these particular steps are included within the SQL Server install instructions in the appendixes to the *Install/Upgrade Guides*). Proceed to “Step 2 – Configuring SQL Server Reporting Services”.

Step 2 – Configuring SQL Server Reporting Services

The procedure for Configuring SQL Server Reporting Services depends on whether your firm has an Embedded or Split Install of Amicus, and whether or not your Amicus database is in a named instance of SQL. In an Embedded Install, SQL Server is installed on the *same* computer as Amicus Attorney. In a Split Install, SQL Server is installed on a *different* computer—that is, the Amicus Application Server and the Amicus Database Server are separate computers.

Configure via Firm Settings

Use this configuration method if you have an Embedded Install of Amicus and a named instance of SQL:

- 1 At the Amicus Application Server**, log in to Amicus.
If the Amicus Application Server has User Access Control (UAC) enabled (e.g. under Windows 8/7/Vista, or Windows Server 2012/2008), right-click on the Amicus Attorney icon and choose “Run as administrator”.
- 2** From the Office module, choose Firm Settings and click General - Reporting Services.

The screenshot shows the 'Firm Settings' dialog box with the 'General - Reporting Services' tab selected. The dialog contains the following text and controls:

- Header: 'Firm Settings' with standard window controls (minimize, maximize, close).
- Section: 'General - Reporting Services' with a printer icon.
- Instruction: 'Follow these steps to make Reports designed using SQL Reporting Services available.'
- Step 1: 'Install SQL Reporting Services on your Amicus SQL Instance. (Follow instructions in the [Guide](#))'
- Step 2: 'Configure SQL Reporting Services. This must be performed at the Amicus Server! (If your Amicus is a Split Install, follow the Guide.)' with a 'Configure' button.
- Step 3: 'Enter the Web Service URL of your SQL Server Reporting Services:' with a text input field containing 'http://sat:80/ReportServer_amicus', an 'Edit' button, and a 'Test' button.
- Step 4: 'Publish Reports. Use this command to upload reports (those provided by Amicus, or your own custom reports).' with a 'Publish' button.
- Status: 'Last Performed: 11/21/2017 9:44:18 AM by Goran Stojanovski'
- Footer: 'For more information, including how to author custom reports, refer to the Reporting Services Guide.'
- Bottom bar: Navigation arrows, 'Apply', 'OK', and 'Cancel' buttons.

- 3** Click **Configure** to automatically configure your “AMICUS” instance Reporting Services to work with your Amicus application.

- 4 In some cases you might be prompted to indicate the location of the Reporting Services configuration file (`rsreportserver.config`), typically in the following folder:


```
\Program Files\Microsoft SQL Server\MSRSxx.INSTANCE
  \Reporting Services\ReportServer
```

 where *MSRSxx* will be:
 - MSRS10 if you have SQL Server 2008
 - MSRS10_50 if you have SQL Server 2008 R2
 - MSRS11 if you have SQL Server 2012
 and *INSTANCE* represents your SQL Server Instance Name for Amicus, usually `AMICUS` (but `MSSQLSERVER` by default)
- 5 If you are at a computer that is part of a Windows Workgroup (rather than a Domain), a ConfigurationForm dialog will appear, asking for a User Name and Password. Ask your system administrator who has Windows Administrator rights to the Amicus Database Server to enter their credentials.
- 6 The process will take a few minutes and, when complete, your SSRS Web Service URL will appear in the setting dialog.

Configure manually

Use this configuration method if you have a Split Install of Amicus or do not have a named instance of SQL:

- 1 At the Amicus Database Server, go to


```
\\AmicusServerName\Install\SQLReporting
```

 (where *AmicusServerName* is computer name of the Amicus Application Server) and copy `ReportServerConfiguration.exe` (the Configure utility) to a temporary location on the Amicus Database Server (where SQL Server is installed).
- 2 Run the utility to configure your “AMICUS” instance Reporting Services to work with the Amicus application: *if the Amicus Database Server has User Access Control (UAC) enabled (e.g. under Windows 8/7/Vista, or Windows Server 2012/2008)*, right-click on `ReportServerConfiguration.exe` and choose “Run as administrator”. Otherwise, simply double-click the filename.
- 3 In some cases you might be prompted to indicate the location of the Reporting Services configuration file (`rsreportserver.config`), typically in the following folder:


```
\Program Files\Microsoft SQL Server\MSRSxx.INSTANCE
  \Reporting Services\ReportServer
```

 where *MSRSxx* will be:
 - MSRS10 if you have SQL Server 2008
 - MSRS10_50 if you have SQL Server 2008 R2
 - MSRS11 if you have SQL Server 2012
 and *INSTANCE* represents your SQL Server Instance Name for Amicus, usually `AMICUS` (but `MSSQLSERVER` by default).
- 4 If you are at a computer that is part of a Windows Workgroup (rather than a Domain), a ConfigurationForm dialog will appear, asking for a User Name and Password. Ask your system administrator who has Windows Administrator rights to the Amicus Database Server to enter their credentials.

- 5 Log in to Amicus at any Workstation, go to the Office > Firm Settings, and click General - Reporting Services. Notice that the appropriate SSRS Web Service URL is displayed.

Step 3 – Testing the connection

Click **Test** to check the connection to your SQL Server Reporting Services Web Service URL. If the test fails, please call [Amicus Technical Support](#) at 800-472-2289 or 416-977-6633.



NOTE: If you reconfigure SSRS such that you need to adjust this URL (e.g. in order to use a different port than the default of 80), click Edit, change the URL as appropriate, click Save, and click Test.

Step 4 – Publishing available Reports and Billing Templates

Click **Publish** to make the SQL Reports available to Amicus users. This action deploys all Reports and Templates under the following folder to your SQL Server Reporting Services to your Amicus Server:

```
\Amicus Attorney Server\SQLReportsTemplates
```

This action will be required each time new or edited Reports are to be made available.



NOTE: If a Report or Template of the same name was previously deployed, it will be redeployed only if its file date is more recent than that previous deployment date.

Setting up Firm Members to edit Reports and Billing Templates

In order to edit SQL Reports and Templates, Firm Members will need to install Report Builder—see “Authoring and publishing custom Reports” on page 10. As an Amicus Administrator, you will need to provide them with your SQL Server Reporting Services Web Service URL (shown in Step 3) as it will be required during the Report Builder installation as their Default Target Server.

The Edit function for SQL Reports and Templates is controlled by Amicus Security Profiles. Ensure that the Firm Member is assigned to a Security Profile with sufficient rights. In the Security Profile, this setting is available under Office > Action: “Ability to Edit Reports in SQL Report Builder”.

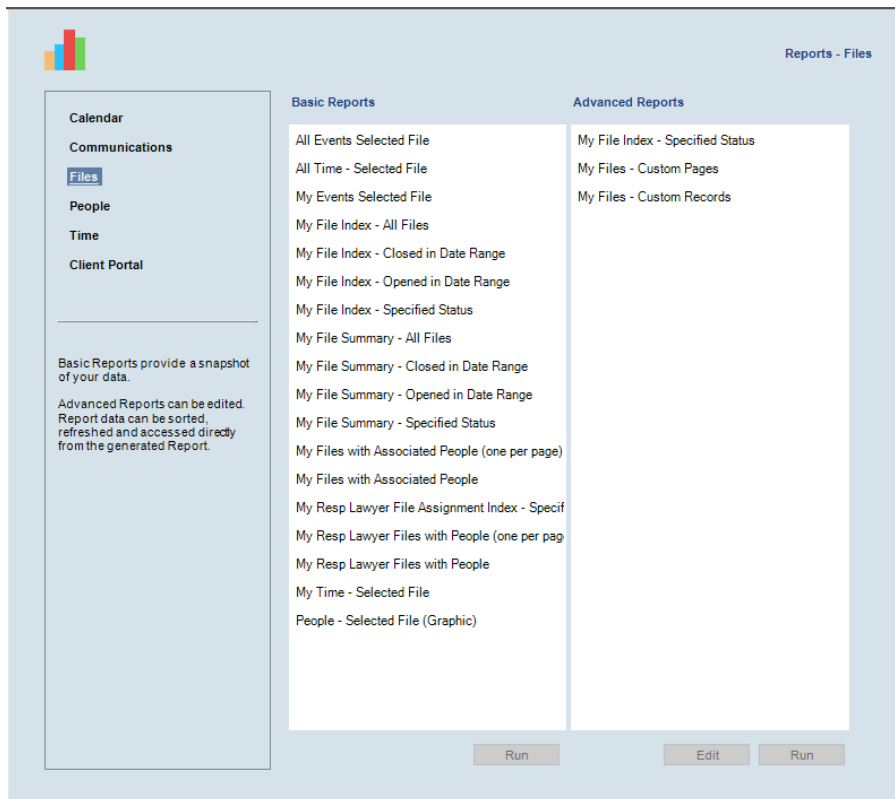


TIP: We recommend that you keep a backup copy of all the standard SQL Reports and Templates provided by Amicus. Copy the `SQLReportsTemplates` folder to a location separate from your `\Amicus` folders.

Running Reports and Billing Templates

Amicus Attorney Reports

In the Amicus Office module, the Report views for Firm Member Reports and Firm Reports include Basic and Advanced sections.



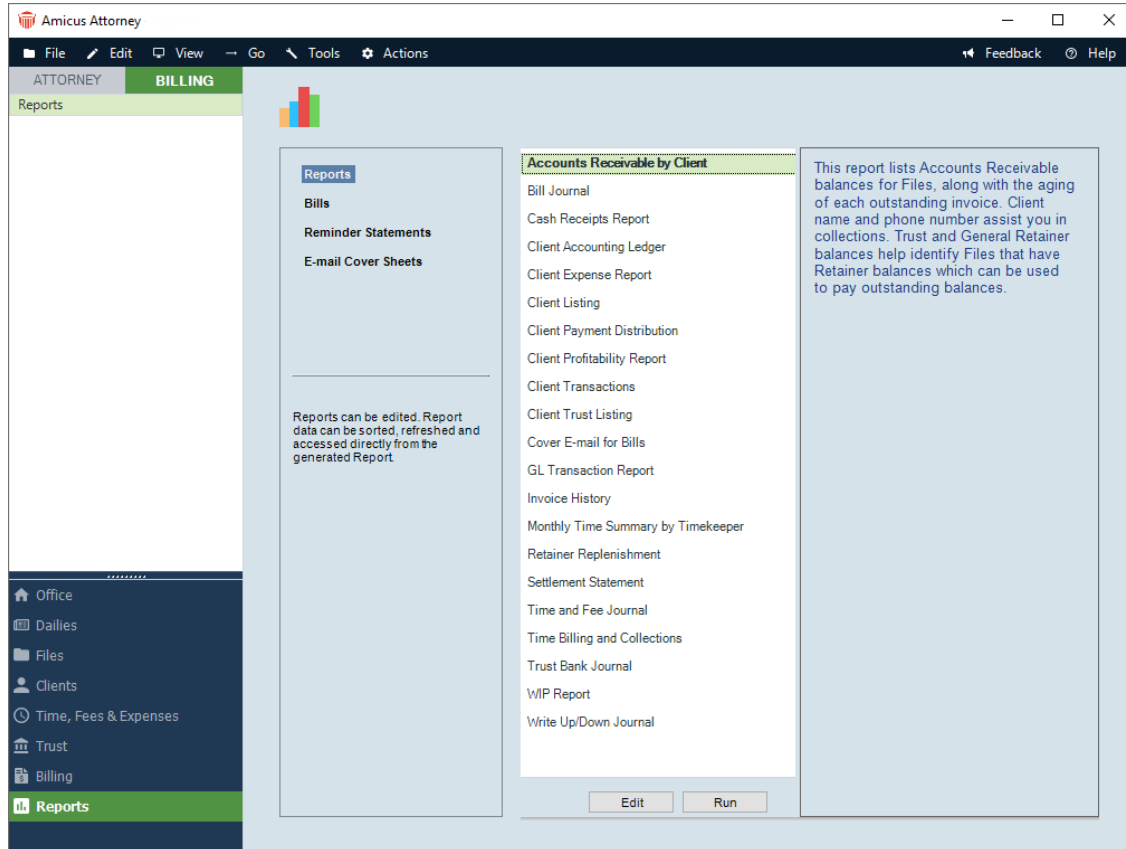
Firm Reports, available only to Amicus Administrators, use information across the entire database. **Firm Member Reports** use only the information available to the Firm Member who runs them.

The Reports in the **Basic** section of a screen provide a static snapshot of your data that can be generated in the following formats: Excel, PDF, DOC, or RTF. However, the Report template itself cannot be edited from Amicus. (These Reports are not in SQL Report format.)

The **Advanced** section includes an assortment of SQL Reports that can be generated in a wider variety of formats including Excel, PDF, DOC, CSV, XML, TIFF, and HTML Web Archive. These Reports can also be edited directly from within Amicus—see “Authoring and publishing custom Reports” on page 10.

Amicus Billing Reports and Templates

If your firm is licensed for Amicus Billing, Billing Users may access Billing Reports, Bill Templates, Reminder Statement Templates, E-mail Cover Sheet Templates, Receipt Templates, and Check Templates from the Reports module on the Billing side of Amicus. (Receipt Templates and Check Templates are available only if those features are enabled in your Firm Settings.)

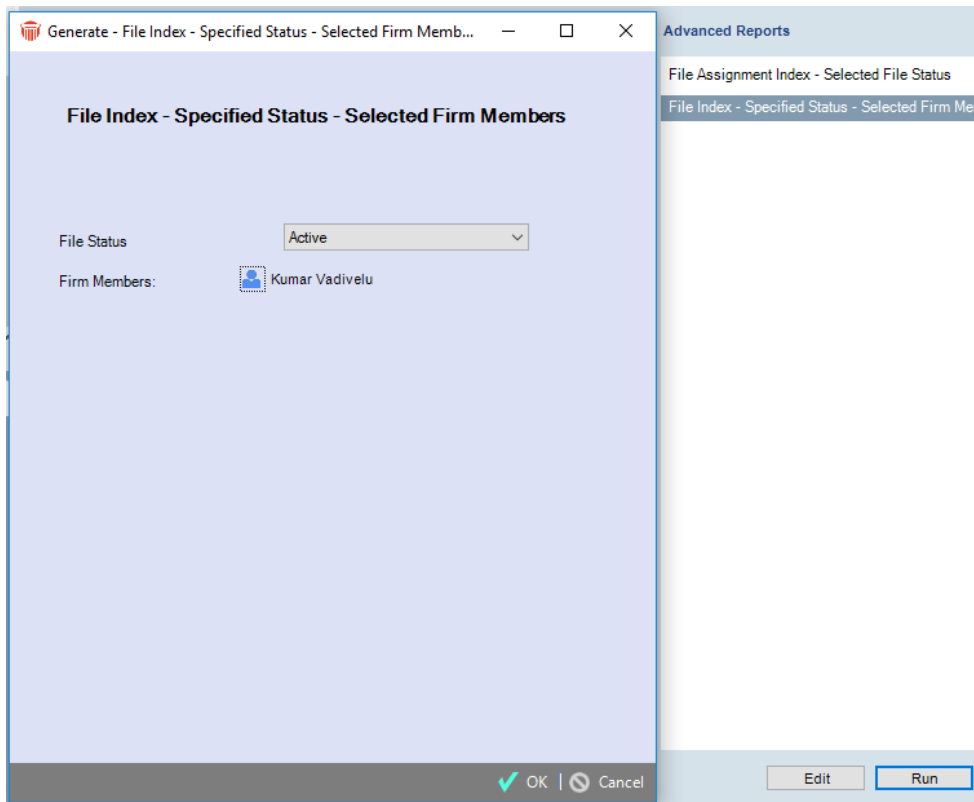


The Reports and Templates use only the information available to the Firm Member who runs them. A Billing Supervisor has access to the most information, and a Billing User without Firm Files and Contacts rights has access to less.








These are all SQL Reports and Templates that can be generated in a wide variety of formats including Excel, PDF, DOC, CSV, XML, TIFF, and HTML Web Archive. These Reports and Templates can also be edited directly from within Amicus—see “Authoring and publishing custom Reports” on page 10.

Running a Report or Billing Template

To run a Report, select it and click **Run**, or double-click it. The Generate dialog appears. Depending on the particular Report or Template, set your parameters for the data to be included if required (choose a date range, select Firm Members, etc.), and click OK.



Generated SQL Reports and Templates open in a Report Viewer that enables you to:

	Control the sort order based on the data in this column.
	Drill down to view the actual data in Amicus. For example, in the Files Index Report you can click on a File Name field to open the corresponding File Details.
	Refresh the data in the Report or Template.
Find Next	Search the Report or Template for the text you specify
	Export the Report or Template in a wide variety of formats.
	Change the page setup (margins, etc.)
	Preview the page layout.
	Print the Report or Template .

Viewing - My File Index - Specified Status

1 of 1 Page Width Find | Next

Donnell & Dole LLC
Files Index
All Files of Specified Status
 Donnell & Dole LLC
 Active

File Name	Responsible Lawyer	Client ID / Matter ID	File Status
Alladin Purchase		1219/014	Active

Alladin Purchase

ATTORNEY BILLING

Alladin Purchase ALLMA/97088

Clients On This File

Firm Members
 Contacts whose role is
 Classified as a Client Role

People on this File

Name	Send Bill	Attention or c/o	Details
Mathew Alladin	<input checked="" type="checkbox"/>		Mr. Mathew Alladin

400 South State Street
 Chicago IL 60605

Authoring and publishing custom Reports and Billing Templates

SQL Reports and Templates can be created and edited with **Report Builder** (available as a free download from Microsoft). Report Builder is an easy to use authoring tool with Office-like functions, including familiar formatting functions and drag-and-drop field selection.

Before you begin

Report Builder

Install and configure an appropriate version of Report Builder at the Workstation where you wish to author Reports or Templates.

Version—Install a version that is compatible with the version of SQL Server against which your Reports and Templates are run.

Download—Report Builder can be downloaded from the Microsoft Download Center website.

Install—When installing Report Builder, enter the SSRS Web Service URL in the Default Target Server dialog. Your Amicus Administrator can provide you with this URL. It is available from the Firm Settings – Reporting Services dialog in Amicus.

Security rights

The Edit function for SQL Reports and Billing Templates is controlled by Amicus Security Profiles. Your Amicus Administrator will need to assign you to a Security Profile with sufficient rights in order for you to edit or add new Amicus Reports or Templates.

Editing the contents of Reports and Billing Templates

To open a SQL Report or Template for local editing, select it from Amicus and click **Edit**:

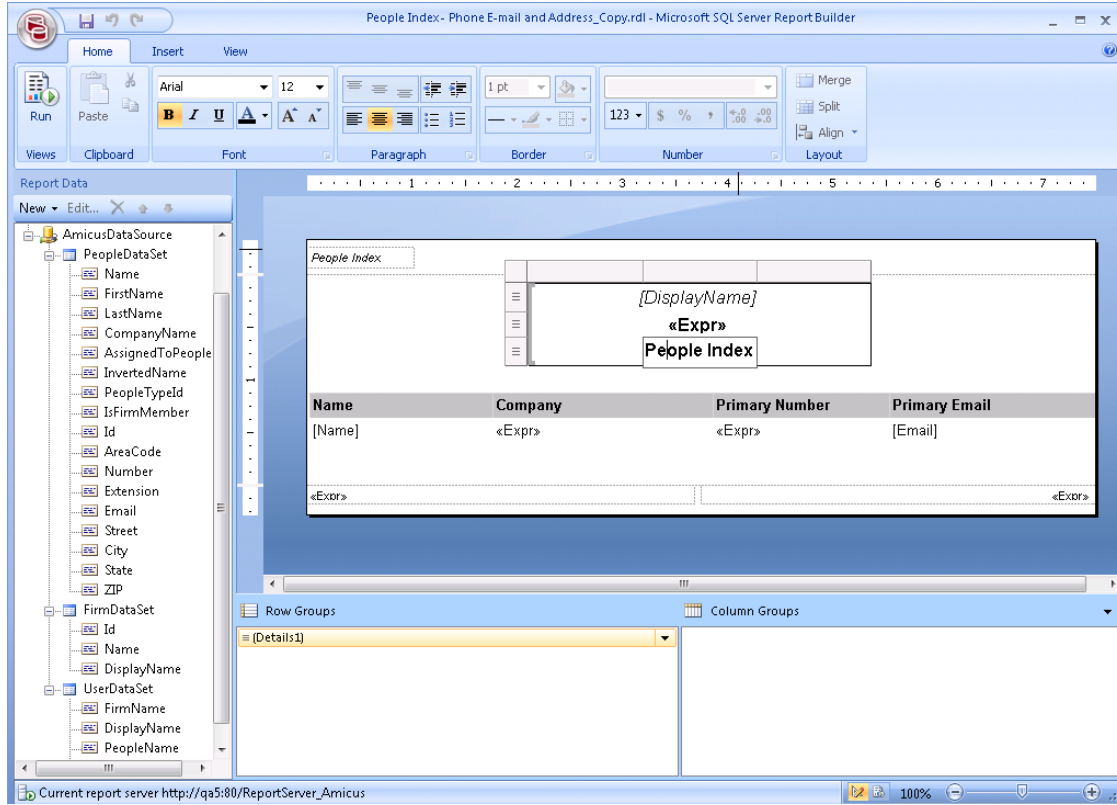
- **Amicus Attorney Reports**—The Office module provides views for both Firm Member and Firm Reports. (Firm Reports are available only to Amicus Administrators.) The SQL Reports are listed in the Advanced section at the right.
- **Amicus Billing Reports and Templates**—Billing Users have access to all Billing Reports, Bill Templates, and Reminder Statement Templates from the Reports module on the Billing side of Amicus.

You will be prompted for a location to which your edited version is to be saved.

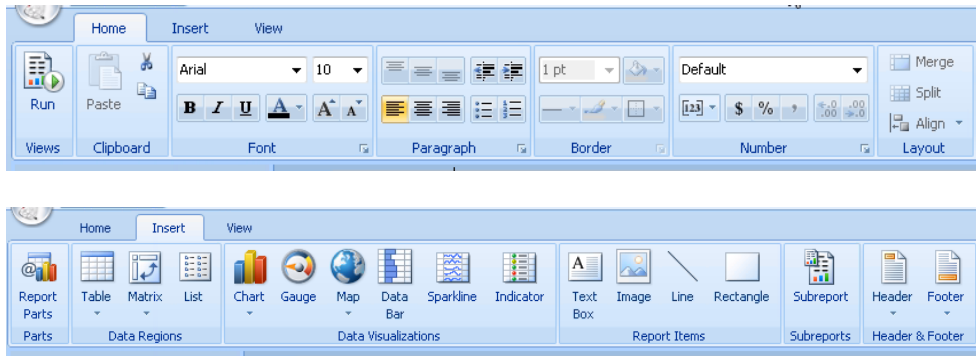
A prompt for the Report Server path appears. This defaults to the SSRS Web Service URL you entered when installing Report Builder. Click Connect.

If you are at workstation that is part of a Windows Workgroup (rather than a Domain), a Microsoft SQL Server Report Builder dialog will appear the first time, asking for a User Name and Password. Ask your system administrator who has Windows Administrator rights to the Amicus Database Server to enter their credentials and select the “Remember my password” option so that this prompt does not reappear in the future.

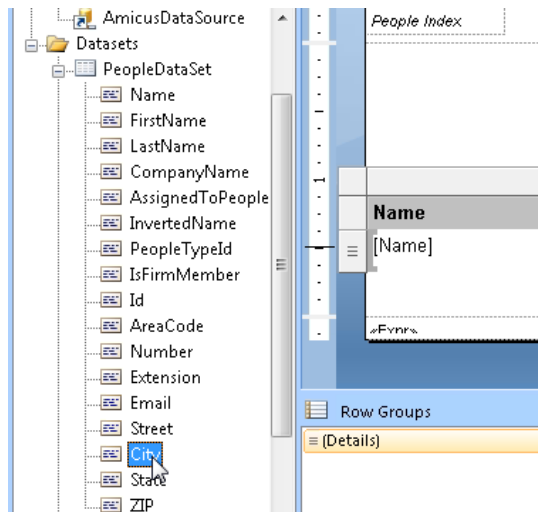
The Report Builder screen appears.



Formatting functions are available from the familiar Ribbon.



Fields can be added simply via drag-and-drop from the Report Data pane to the design surface. The Amicus database fields and pre-defined objects (such as People on File) are presented in an easy to understand way.



Extensive online help, including tutorials, is available within Report Builder.

We recommend that you test new or edited Reports and Templates before they are published for other users. Default values for the Report or Template parameters are provided—for example, User ID defaults to the Current User, and Date Range defaults to Today. Because your rights are automatically passed to SSRS, you can test your Report directly from Report Builder.

To test your Report or Template, choose Run from the Home tab on the Ribbon. If you are not permitted run Reports or Templates from Report Builder, please contact [Amicus Technical Support](#) at 800-472-2289 or 416-977-6633.

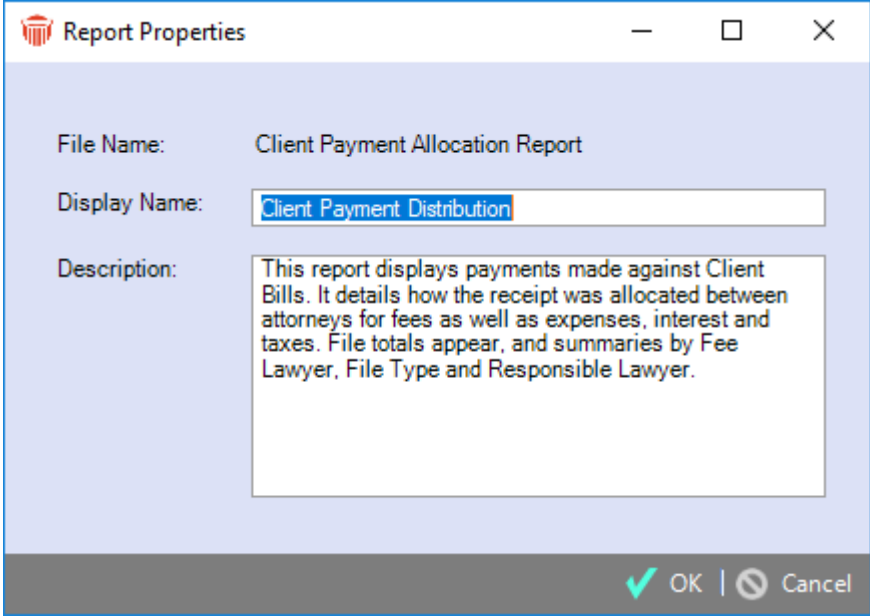
To save your changes to the existing Report or Template, choose the **Save** menu command. To create a new Report or Template, choose the **Save As** menu command and provide a new name.



IMPORTANT: The standard Reports and Templates might be revised in future Amicus upgrades. We therefore recommend that you name your customized Reports and Templates differently in order to prevent their being overwritten later.

Editing the name and description of Billing Reports and Templates

To edit the display name and description of Billing Reports and Templates, simply right-click on the item in the Reports module and choose **Properties**.



The screenshot shows a dialog box titled "Report Properties" with a light blue background. It contains three fields: "File Name" with the value "Client Payment Allocation Report", "Display Name" with the value "Client Payment Distribution" (highlighted in blue), and "Description" with the text "This report displays payments made against Client Bills. It details how the receipt was allocated between attorneys for fees as well as expenses, interest and taxes. File totals appear, and summaries by Fee Lawyer, File Type and Responsible Lawyer." At the bottom right, there are "OK" and "Cancel" buttons.

To have these changes take effect, the Reports and Templates must be republished by an Amicus Administrator.

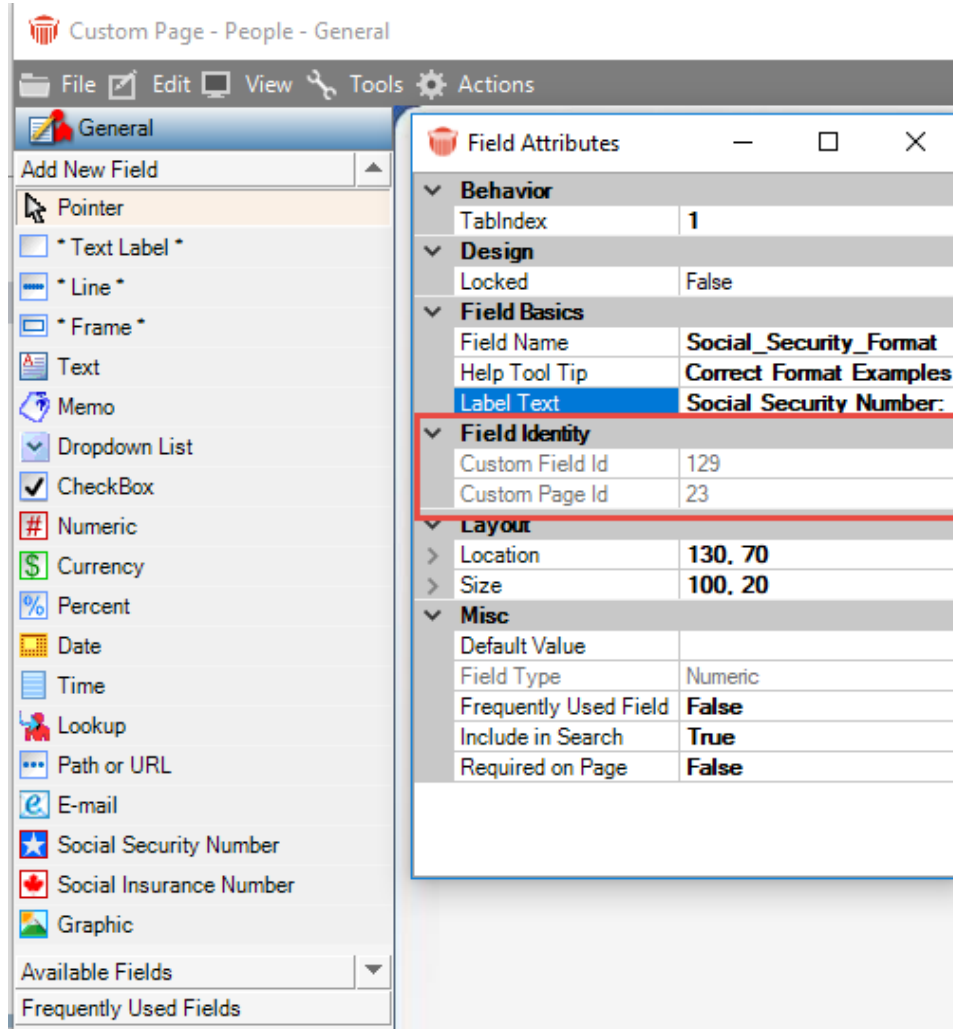
Adding Custom Fields to Reports or Billing Templates

When creating or customizing Advanced (SQL) Reports, you can include Amicus Custom Fields.

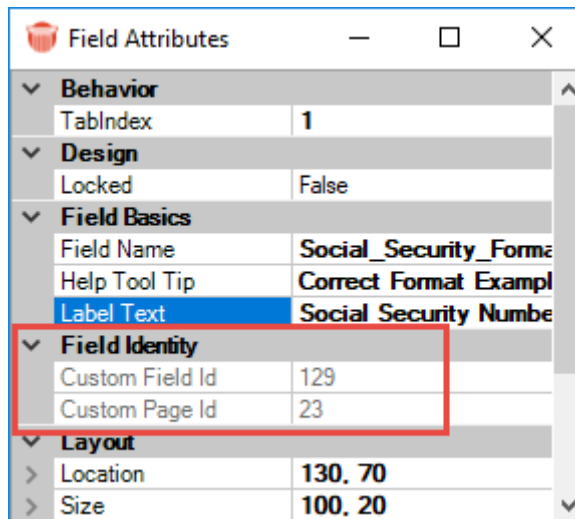
- For a Custom Field on a Custom Page, you'll need to know its Field ID and Page ID.
- For a Custom Field on a Custom Record, you'll need its Field ID and Record ID.

These IDs are conveniently provided in the Field Attributes window in the Amicus Custom Page/Record Designer.

Custom Field on a Custom Page:



Custom Field on a Custom Record:



Publishing Reports and Billing Templates

In order to make new or edited Reports and Templates available from within Amicus, they must be copied to the appropriate subfolder on the Amicus Application Server and published by an Amicus Administrator.

- 1 For Amicus Attorney Reports, copy the desired Reports to the appropriate subfolder on the Amicus Application Server. The following subfolders are provided by default:

```
\Amicus Attorney Server\SQLReportsTemplates\Attorney\Firm
  \Calendar
  \Communications
  \Files
  \People
  \Time
```

```
\Amicus Attorney Server\SQLReportsTemplates\Attorney\Firm Member
  \Business Planning
  \Calendar
  \Files
  \People
  \System Administration
  \Time
```

If desired, you can rename Amicus Attorney subfolders, or create new ones and add Reports to them. Upon publication they will appear in the corresponding Amicus Reports view. Up to 8 Firm subfolders and 8 Firm Member subfolders can be displayed.

- 2 If Amicus Billing is licensed, copy the desired Reports and Templates to the appropriate folder or subfolder on the Amicus Application Server. The following are subfolders provided:

```
\Amicus Attorney Server\SQLReportsTemplates\Billing\
\Amicus Attorney Server\SQLReportsTemplates\Billing\Bills
\Amicus Attorney Server\SQLReportsTemplates\Billing\Statements
```

IMPORTANT: Do not rename or add Billing subfolders.

- 3 As an Amicus Administrator, go to the Office, choose Firm Settings, and click General - Reporting Services.
- 4 Click Publish to make the SQL Reports and Templates available from Amicus. This deploys all Reports and Templates from the above folders to your SQL Server Reporting Services and thereby to the Team Members.



NOTE: If a Report or Template of the same name was previously deployed, it will be redeployed only if its file date is more recent than that previous deployment date.

Deleting Reports and Billing Templates

In order to delete a Report or Template, it must be deleted from the appropriate subfolder on the Amicus Application Server and, if published, also deleted via Reporting Services Configuration Manager.

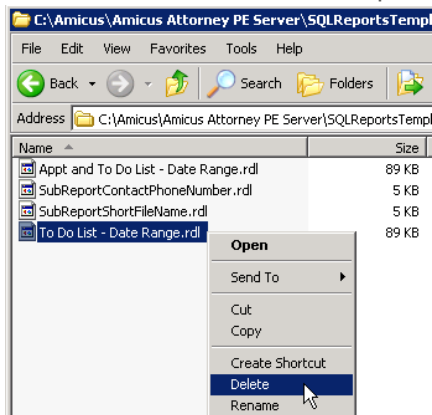


CAUTION – Take care in deleting Billing Templates:

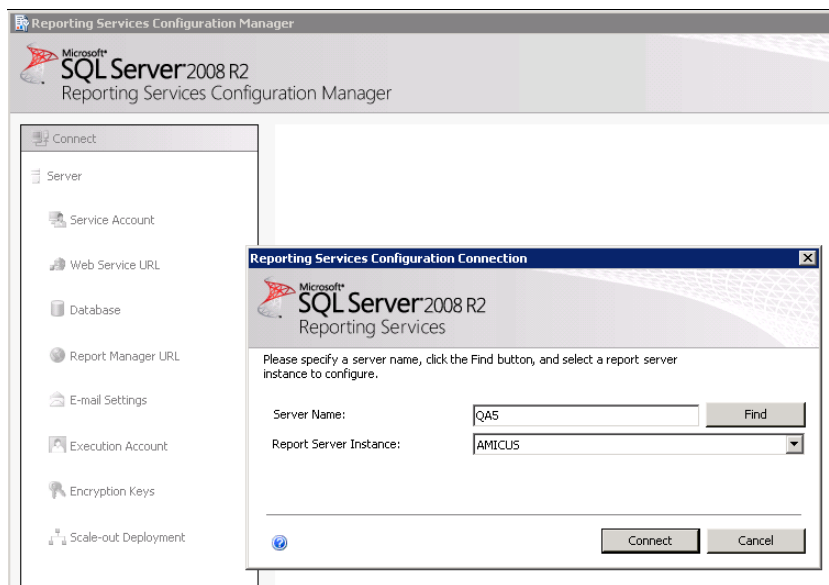
- Do not delete the “Standard” Bill or Reminder Statement Templates.
- If you delete a Bill Template that was assigned to a Draft or Final Bill (either directly or via the File setting), a Bill image will not be created or printed when you post that Bill.
- If you delete a Template that was assigned to a Bill Profile, File, or Client, that assignment will be removed and left blank. Although the “Standard” Template will be used for new Bills or Reminder Statements, we recommend that you assign an existing Template for clarity.

- 1 In Windows Explorer at the Amicus Application Server, navigate to the appropriate subfolder of `\Amicus Attorney Server\SQLReportsTemplates`

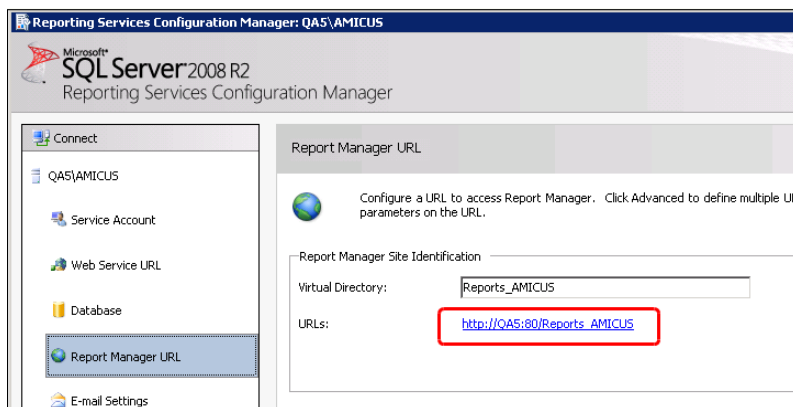
Then delete the .RDL file for the Report or Template.



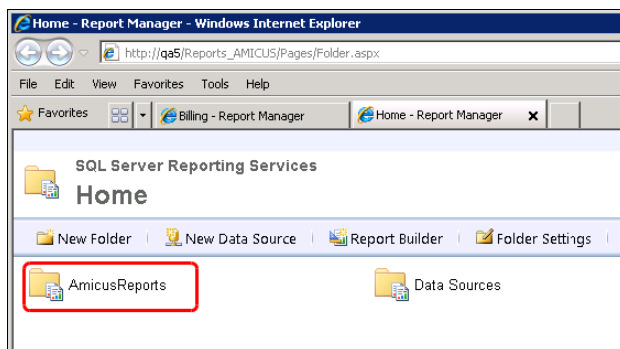
- 2 If the Report or Template had already been published, complete the following additional steps:
 - a From the Windows Start Menu, choose Microsoft SQL Server 2008 [R2] > Configuration Tools > Reporting Services Configuration Manager.
 - b In the Reporting Services Configuration Manager dialog, click Connect.



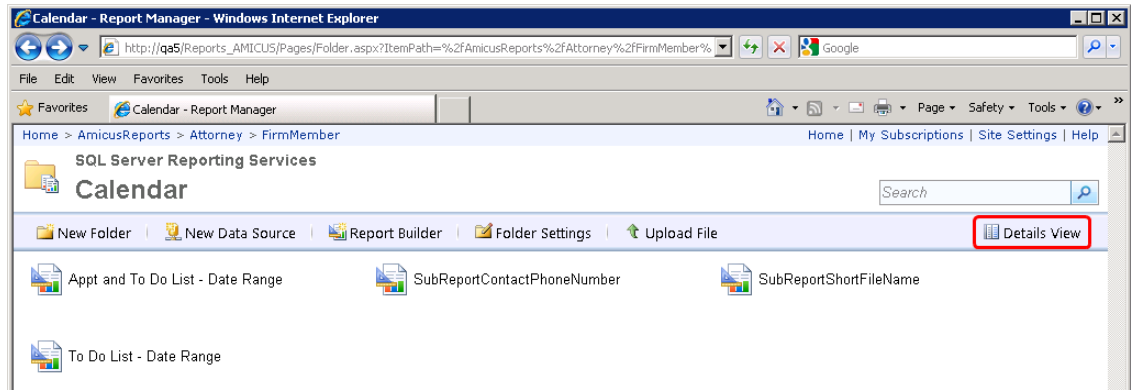
- c Choose “Report Manager URL” in the navigation list at the left, and then click on the URLs link.



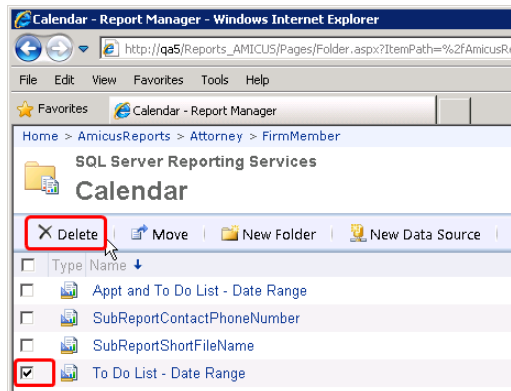
- d In Report Manager (which opens in your Web Browser), click Amicus Reports.



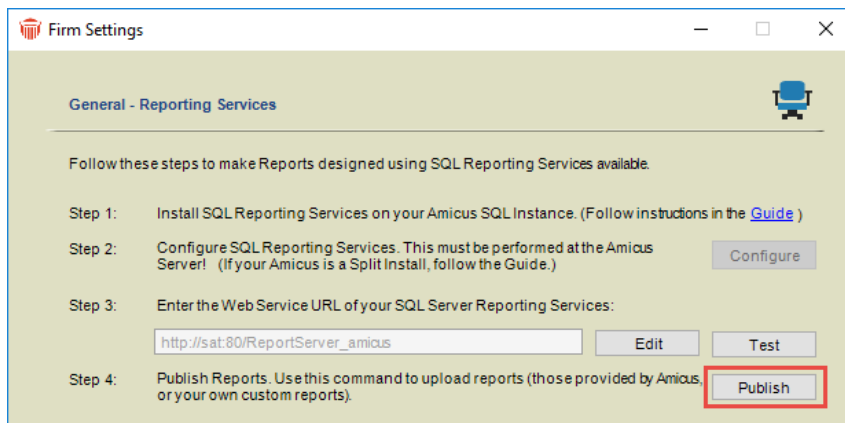
- e In the subsequent pages, navigate to the Report or Template you wish to delete and then click Details View.



- f Select the checkbox next to the Report or Template you which to delete, and click Delete. Note that this does not yet remove the item from the Amicus views—you must perform the next step.



- g In Amicus as an Amicus Administrator, go to Office > Firm Settings > General - Reporting Services, and click Publish. The deleted Report or Template will no longer be available to users.



APPENDIX: Installing SQL Server Reporting Services

Microsoft SQL Server 2008, 2008 R2, or 2012 Reporting Services must be installed before you can set up Reporting Services and make SQL Reports available to Amicus users.

- 1** Log onto your Amicus Database Server (the computer running SQL Server), as a user with Windows “Administrators” Group rights. This may be a different computer than your Amicus Application Server.
- 2** Insert your SQL DVD into the disk drive. The Setup program should start automatically. If not, click the Windows Start button, choose Run, and enter *[disk drive letter]: \setup.exe*
- 3** At the end of this preliminary install, you might be prompted to restart the computer. Then, to resume the installation, re-insert the DVD into the disk drive.
- 4** In the SQL Server Installation Center screen, click Installation at the left, and then click the “**New installation or add features to an existing installation**” option at the right.
- 5** The SQL Server Setup wizard starts. Accept the default settings in the subsequent dialogs, **EXCEPT:**
 - **Installation Type**—Ensure that the “Add features to an existing instance...” option is selected and, if necessary, select the “AMICUS” instance in the drop-down list box.
 - **Feature Selection**—Choose the following Instance Feature: “Reporting Services”.
 - **Server Configuration**—On the Service Accounts tab, ensure that the SQL Server Reporting Services services has Account Name set to “NT AUTHORITY\SYSTEM”, and Startup Type set to “Automatic”.

Follow the onscreen instructions to complete the install.



AbacusNext
Phone: 800-472-2289
416-977-6633
www.abacusnext.com
info@abacusnext.com

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