Using SSRS to Build and Run Polaris Reports

Presented by: Wes Osborn

IUG 2015

CENTRAL LIBRARY CONSORTIUM

CONNECTED. CREATIVE. CURRENT.

http://tinyurl.com/iug2015

You don't have to copy the slides

Overview

What is SSRS and how to configure it

SSRS from a user's perspective

Building SSRS Reports

Hidden Polaris Reports

What is SSRS?

More than just a fancy acronym

SSRS Details

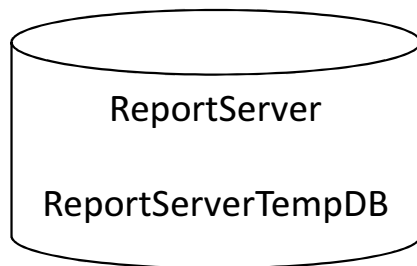What are the components of SSRS?

Where is it installed?

How do I configure it?

SSRS Components

A Database

Configuration Settings

Report "files" (XML)

ReportServer

ReportServerTempDB

Web Services

API Service

/ReportServer

User Interface

/Reports

Where to install the SSRS database?

On Polaris DB server

Pro

    Less servers

Cons

    HTTP on Polaris DB

    Messy SQL Agent

On a separate server

Pros

    Separate report cache

    Has its own SQL Agent

Cons

    Separate backup

    Polaris Upgrades

    May need license

Messy SQL Agent

Scheduled reports are listed in SQL Server Agent

Makes finding Polaris jobs difficult

SQL Server Agent
  Jobs
    0CF32394-A3A0-4BBA-97B9-65A1B954E317
    1DB2F1C3-F457-48A5-8CF5-F246184301AF
    285A9218-50EE-4ED5-85FC-A47D5F4827F9
    2B316D73-5CF4-4CA9-9C9A-4148EE3A1A38
    4330AA00-8BD0-4DC2-B210-6A480E5E9848
    45574896-E625-498B-AE34-CA060B616658
    4CF5CCF1-A44D-4C4D-A486-2560C86E7F83
    53E5A905-3E4C-46DD-B8E5-F2CDDD2556B4
    560A6499-E00F-4D24-9021-477A26D32B85
    5F80F172-F99E-46C1-B1BB-F99E000C2E21
    6890DED0-F33E-4798-9464-2D58C2040BEA
    7297AF1A-4424-4D66-BA77-E49742F0756B
    73991345-5430-426E-A2DD-E4422E785840
    82CC5E3C-477A-4BB2-8EE8-8D50C7D1638C
    857CB73C-96E6-4E58-8382-2DE669375CAE
    85B31398-72EB-4A82-B847-EDF68A9EEDD1
    89013A9D-4B54-4D75-B651-01FF82C9DCFC
    8E61B8AD-D6E3-477D-8599-B10E40103BBB
    93E616E4-D578-4BDC-8192-252D9F0560ED
    94A0C9B6-D017-4AA3-97E5-6FEA38DCDEF4
    97BEF170-2A4A-4B92-AF1B-1166F474D3E0
    992F453A-23BE-4530-8B4F-2BB659EBF58F
    9D2025C6-F214-4DC9-BE34-357AB3410A10
    Backup.Subplan_1
    C30A5749-2F8F-4FAC-A3DC-71106CEED446
    CDW_PRODDB_PRODREPORTS_0
    DC535ACF-991C-415C-A2E2-91F6C3B4BA5C
    E4774E0F-72D5-4513-8897-F1958E346E55
    E58B1DC0-8F51-4CA0-9418-D79761539242
    E70A2E47-7A1B-4E62-AA3F-340EC0F428D4
    E90A47F1-B52C-4846-97F2-087E169E6654
    EAAC7B38-B0B3-4DCF-AE7A-8A519FF936CC
    F2BEBA40-43BD-4B31-950C-62A572FEA620
    F41FD7E4-4928-461B-A32D-E3776802A20D

Do not install SSRS alongside an existing IIS server

Resist the temptation and save yourself the configuration headaches.

How do I configure SSRS?

SSRS GUI Tool

SSRS Web UI (/reports)

SSRS .config file

Polaris Configuration

SSRS GUI Tool

Service Account

URL settings

Email settings

SSRS GUI Tool
Reporting Services Configuration Manager
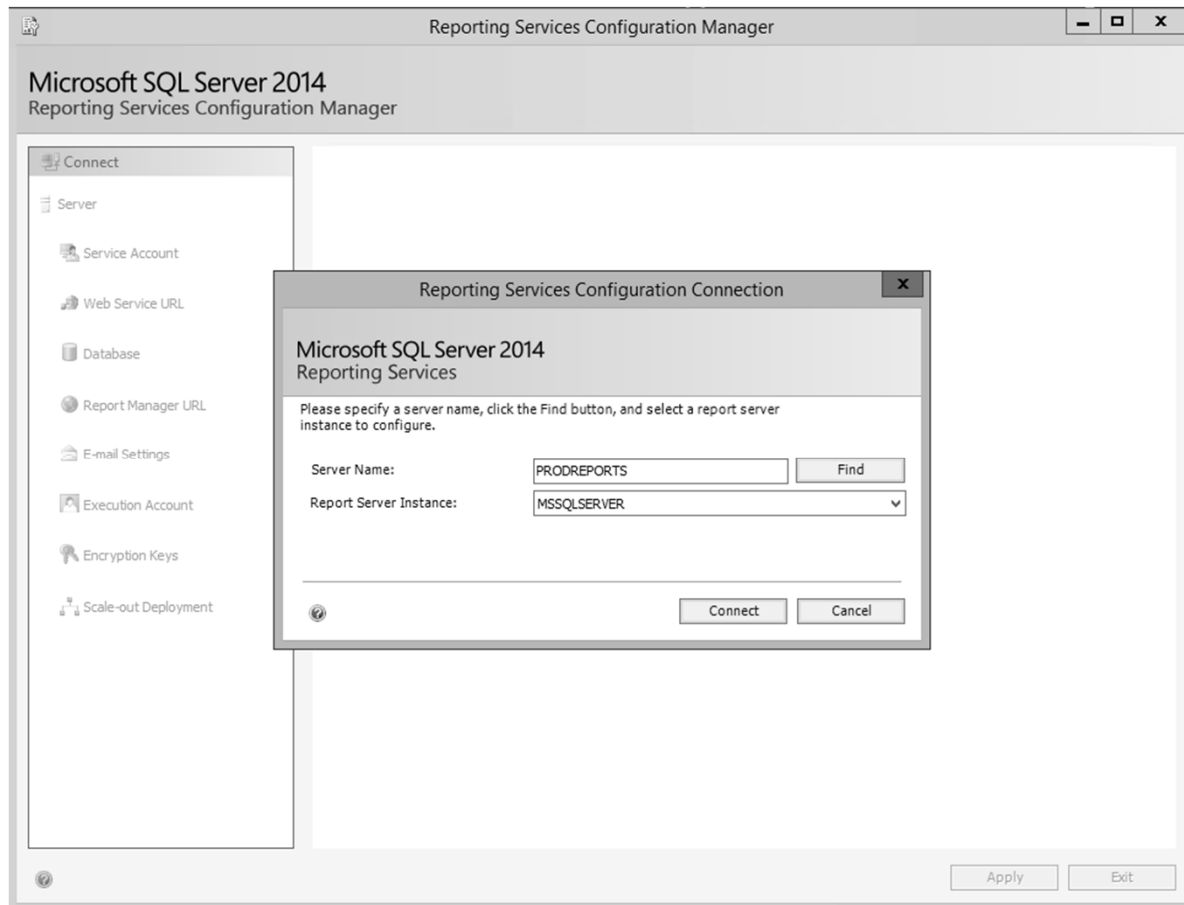
SSRS GUI Tool
Service Account
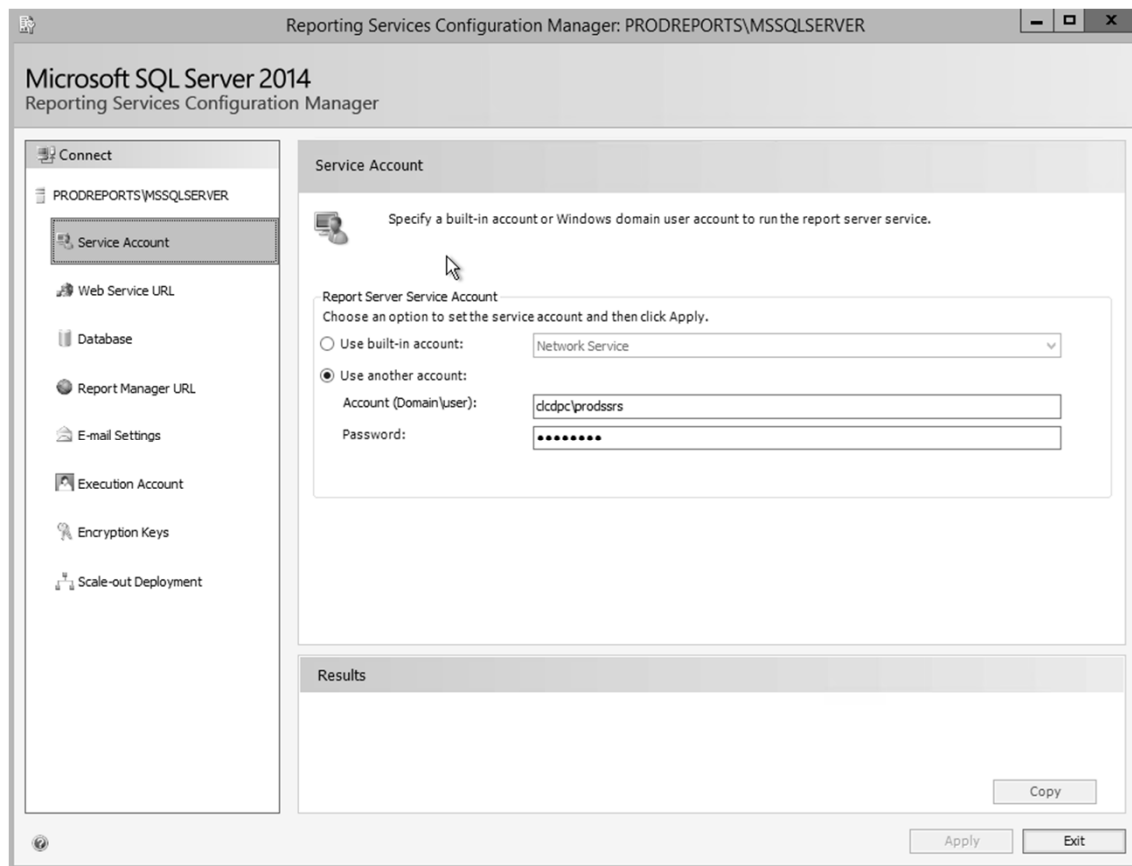
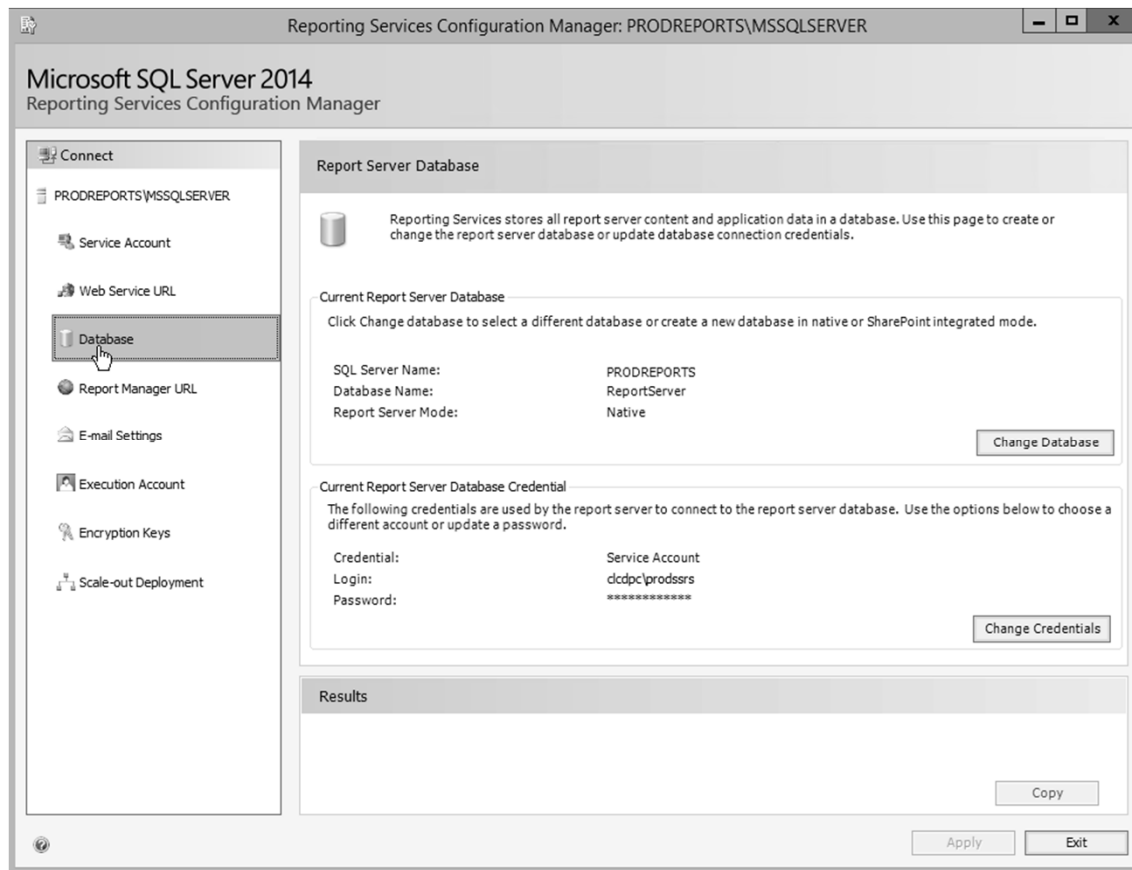Use Domain Account

Add Kerberos HTTP bindings to account name

Example:

setspn -s HTTP/reports.clcohio.org clcdpc\prodssrs

Account needs trusted for Kerberos Delegation

Trusting SSRS Account for Delegation

SSRS GUI Tool
Database

If moving SSRS database, please see: http://bit.ly/1bHuX6f

SSRS GUI Tool
Web Service

Don't bind IP to HTTP port 80 service

Bind to port 443 and assign appropriate certificate
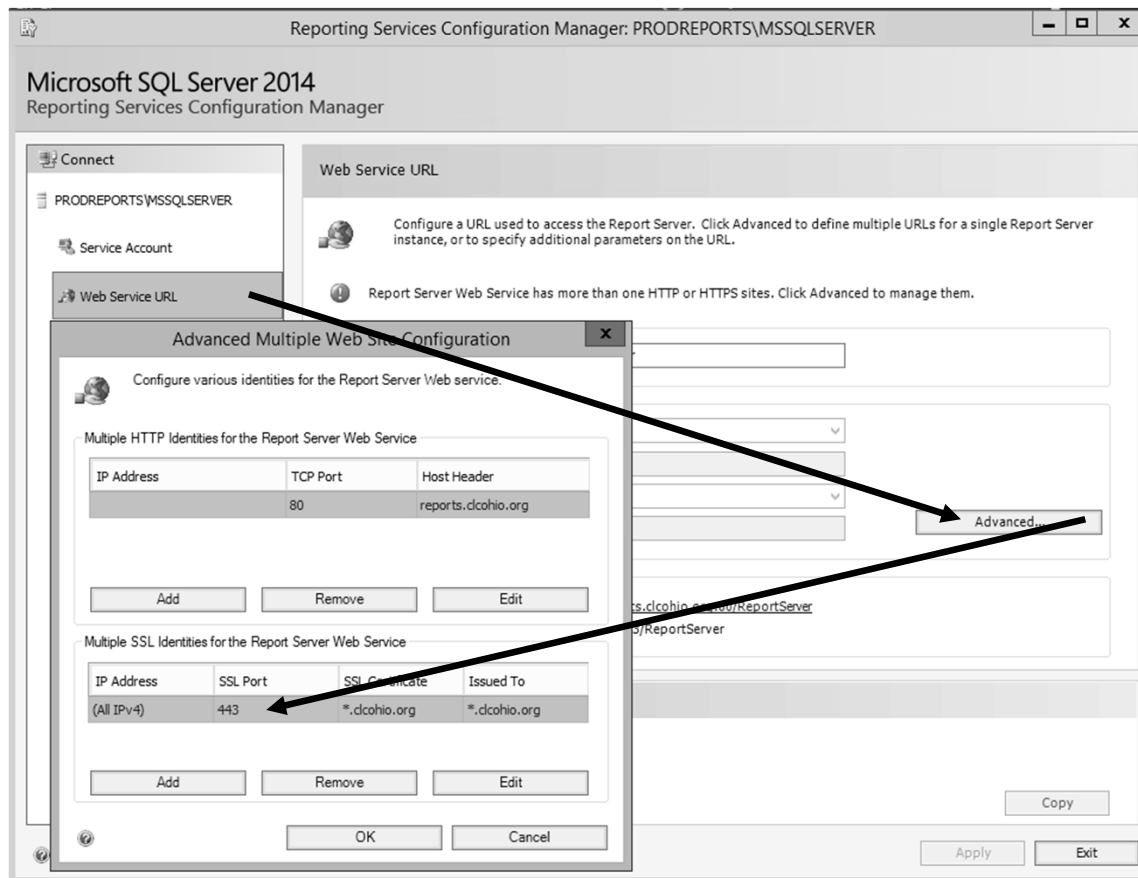
SSRS GUI Tool
Web UI
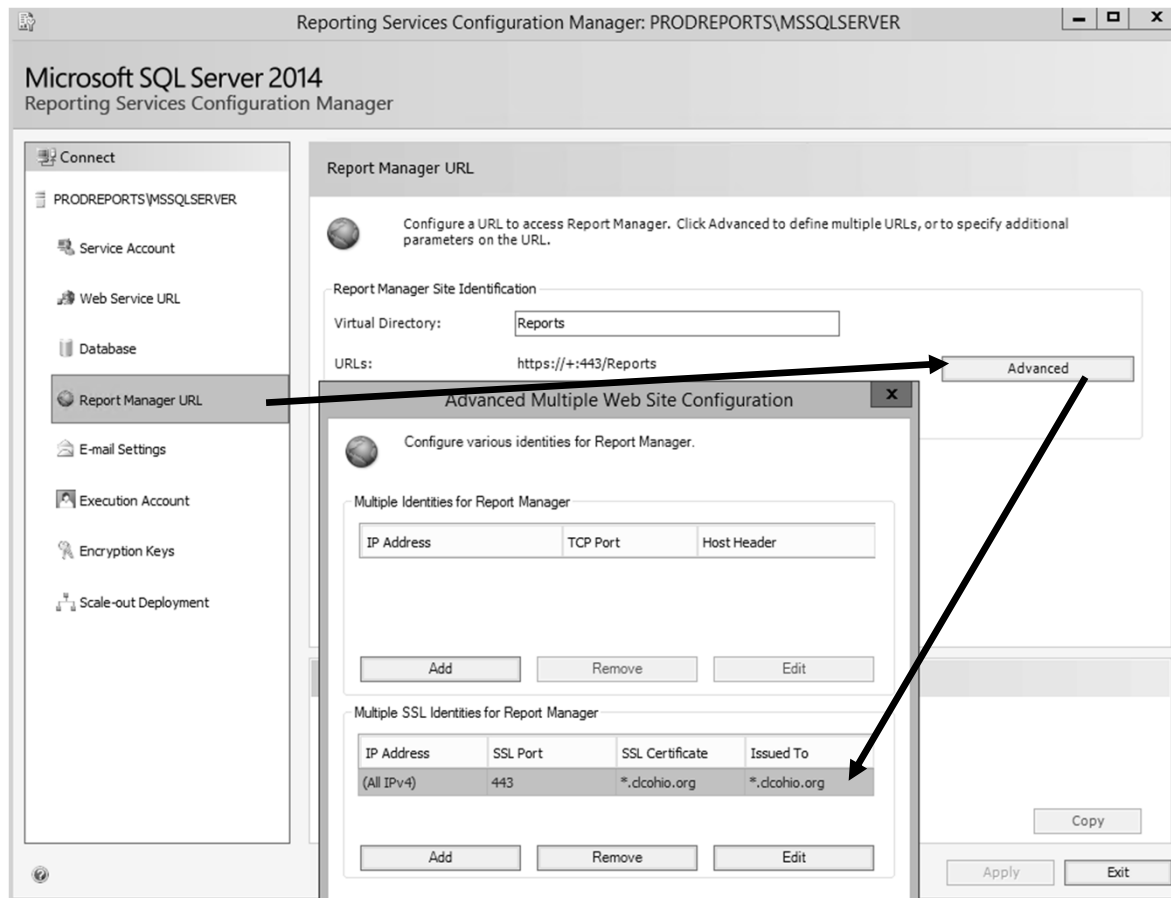
Don't bind IP to HTTP port 80 service

Bind to port 443 and assign appropriate certificate

SSRS GUI Tool
Email Setup
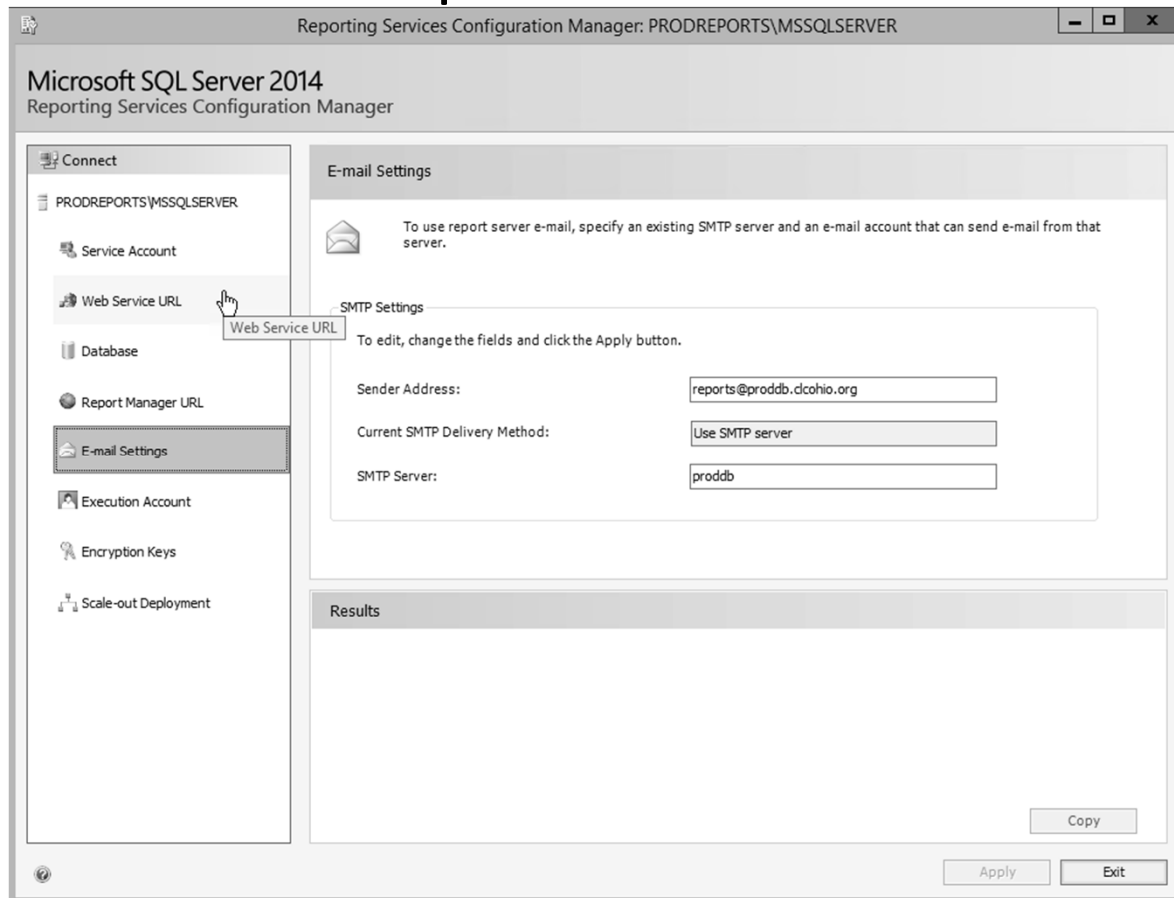
Must setup for report subscriptions via email

If using <u>authenticated</u> email server, see .config file for setup

SSRS Web UI – The Opening Page
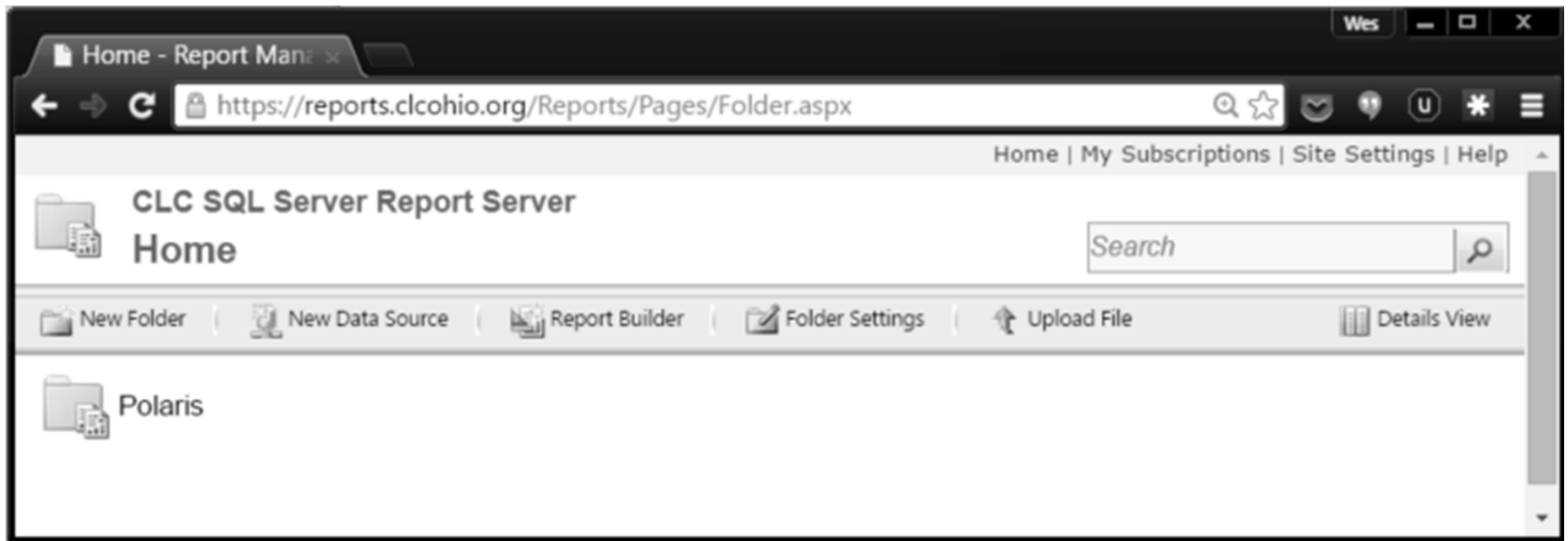
SSRS Web UI Security
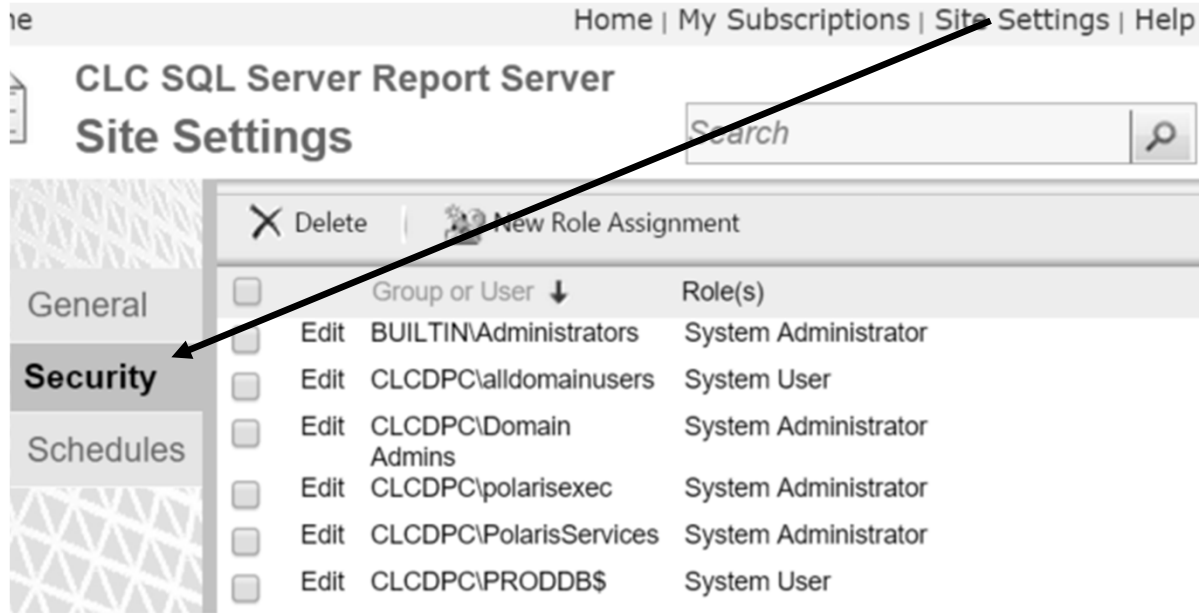
Log into the SSRS Web UI (FQDN/Reports)

Site Settings upper right hand corner, Security subtab

Add "System User" and "System Administrator" AD Groups

SSRS Web UI
Shared Schedules

Log into the SSRS Web UI (FQDN/Reports)

Site Settings upper right hand corner, Schedules subtab

Add preferred runtimes for user scheduled reports

SSRS RSReportServer.config file

Changing access URLs

Changes security connection requirements

Change email settings for subscriptions

File location (SQL 2014):

C:\Program Files\Microsoft SQL Server\MSRS12.MSSQLSERVER\Reporting Services\ReportServer

SSRS RSReportServer.config URLs
All should match FQDN of Certificate

<ReportServerExternalUrl>

<ReportServerUrl>

<URLRoot>

SSRS RSReportServer.config Security Requirements

`<Authentication>`

      `<AuthenticationTypes>`

New Entry ➡ `<RSWindowsNegotiate/>`

      `</AuthenticationTypes>`

`</Authentication>`

SSRS RSReportServer.config Security Requirements

<Add Key="SecureConnectionLevel" Value="3"/>

Added anywhere in config file

Makes SSL / TLS required for all Web Service methods

SSRS RSReportServer.config Email Requirements

<SendEmailToUserAlias>False</SendEmailToUserAlias>

Added under <Extension Name="Report Server Email".....

Enables using full email address in report subscriptions

Other email settings (auth): http://bit.ly/1HVWBtz

SSRS RSReportServer.config
Reduce Bogus Errors (optional)

Comment out the following sections:

- Microsoft.ReportingServices.DataExtensions.SqlDwConnectionWrapper, Microsoft.ReportingServices.DataExtensions
- Microsoft.ReportingServices.DataExtensions.TeradataConnectionWrapper,Microsoft.ReportingServices.DataExtensions
- Microsoft.ReportingServices.SemanticQueryEngine.Sql.MSSQLADW.MSSqlAdwSQCommand,Microsoft.ReportingServices.SemanticQueryEngine
- Microsoft.ReportingServices.SemanticQueryEngine.Sql.Teradata.TdSqlSQCommand,Microsoft.ReportingServices.SemanticQueryEngine

Disable Loopback Connections

Makes sure the FQDN for SSRS works properly

Disable "the right way": http://bit.ly/1BFxZQa

SSRS and Polaris

SSRS configuration in Sys Admin

SSRS configuration in SimplyReports

SSRS Configuration
In Polaris System Administration

System -> Staff Client ->
Report server

Set the server & service
URL to the FQDN that
were configured earlier

SSRS Configuration
In SimplyReports

		Patrons	Patron Ac
		Security	Applicati

Maximum simultaneous users	9999
Allow statistical report overides	☑
Allow users to share reports	☑
Start with filter expansion areas open	☐
Base directory of web service repository	C:\ProgramData\Polaris\SRServiceRoot
SimplyReports web service URL	https://simplyreports.clcohio.org/SRWebService/SRSQLService.asmx
SimplyReports MARC web service URL	https://simplyreports.clcohio.org/SRWebService/SRMarcWebService.as
Instance name	PRODSR
Maximum number of rows for ad-hoc list reports	999999
Maximum number of rows to add to a Polaris record set	99999
† Maximum number of rows for ad-hoc reports HTML previews	1000
Maximum rows per page for patron and item history reports	100
Maximum timeout ad-hoc report production (in seconds)	600
SimplyReports: Minutes of inactivity before session refresh	59
Maximum number of MARC records per byte array (no holdings)	5
Maximum number of MARC records per byte array (with holdings)	5
Purge ad-hoc report files after	10 days
Purge files generated by running saved reports after	10 days
Purge files generated by scheduling saved reports after	10 days

Reporting services settings

Reporting service URL	https://reports.clcohio.org/reportserver
Root folder for RDL	/Polaris
Reporting Services publishing account	polarisexec
* Reporting Services publishing account password	
Reporting Services publishing account domain	clcdpc
Report Builder application reference	/ReportBuilder/ReportBuilder_3_0_0_0.application

Admin -> Application defaults -> Reporting service URL

Click the "Edit" button and set the Reporting service URL to the FQDN that was setup earlier

SSRS from a user perspective

Where reports and the real world collide

Using SSRS to run reports

Finding and running reports

      Drill Down

      Searching

      Output formats

Creating report subscriptions

Data-driven report subscriptions

The Polaris Toolbar Reports
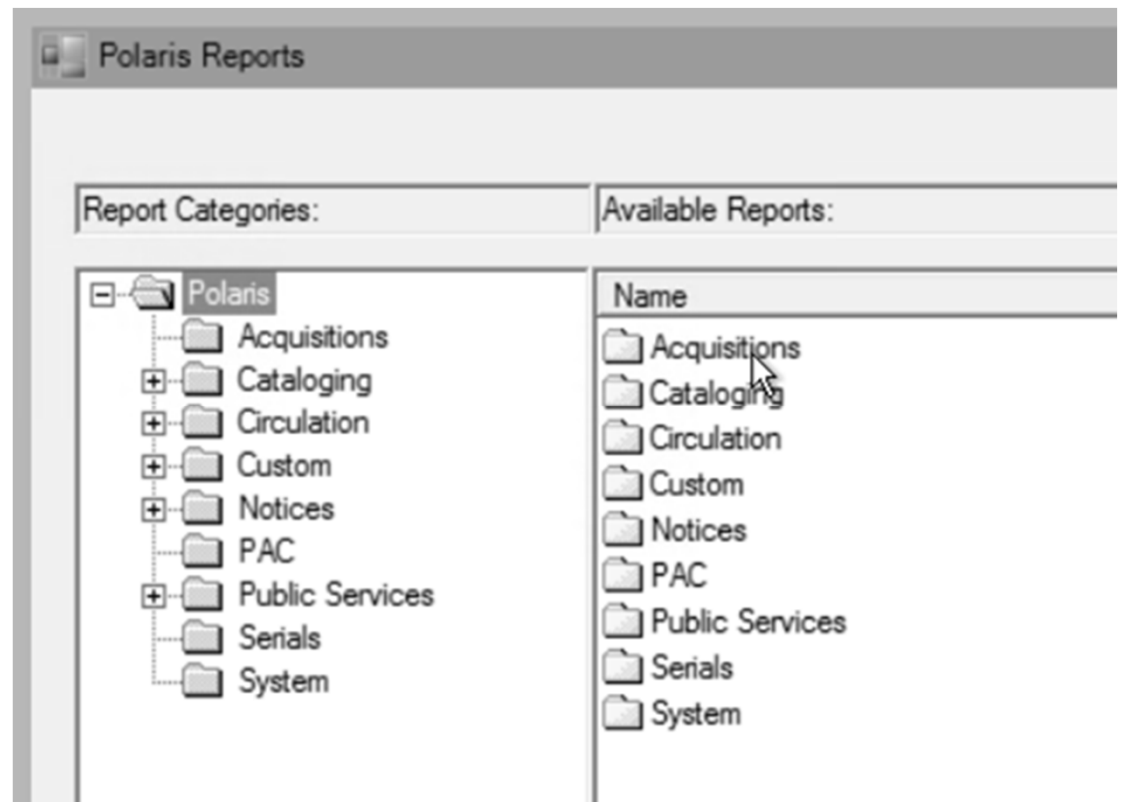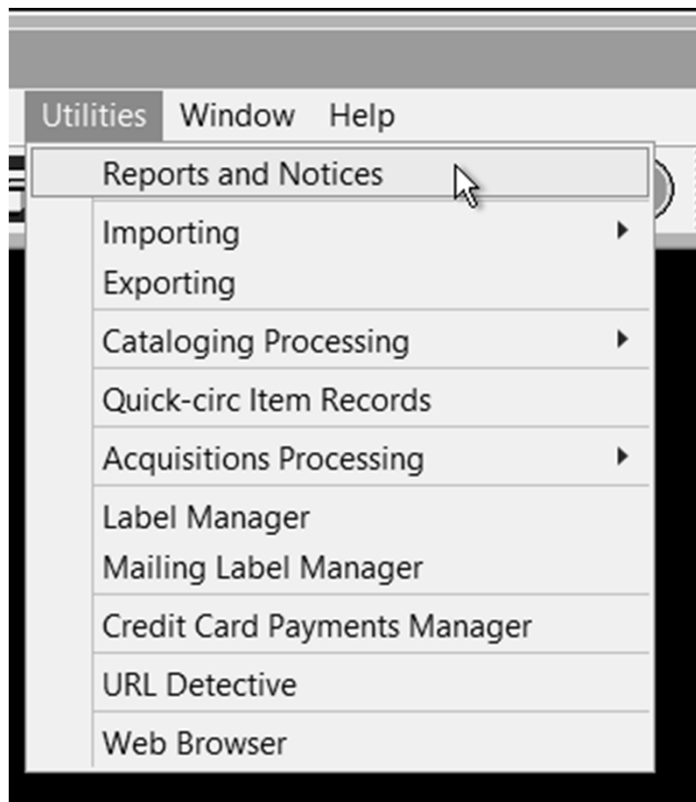
SSRS Web User Interface

User Interface

/Reports

SSRS Web UI – The Opening Page

Finding Reports using SSRS Web UI

SSRS Web UI – The Polaris Folder

SSRS Web UI – Drilling Down

SSRS Web UI – Searching

SSRS Web UI – Searching
Partial String Matches

SSRS Web UI – Searching
No Folder Names

Running Reports in SSRS

SSRS Web UI – Running Reports

SSRS Web UI – Running Reports
Support for defaults

Click **View Report**
button after filling in
parameters

SSRS Web UI – Report Preview

Locations Alexandria Public Library ⌄   Begin Date 3/1/2015 🗓   [View Report]

End Date 3/31/2015 11:59:59 PM 🗓

|◀ ◀ 1   of 1 ▷ ▷| [   ] Find | Next   🖫 ▾ ⟳ ▦

Item Circulation By Collection Group

From 3/1/2015 to 3/31/2015

Alexandria Public Library

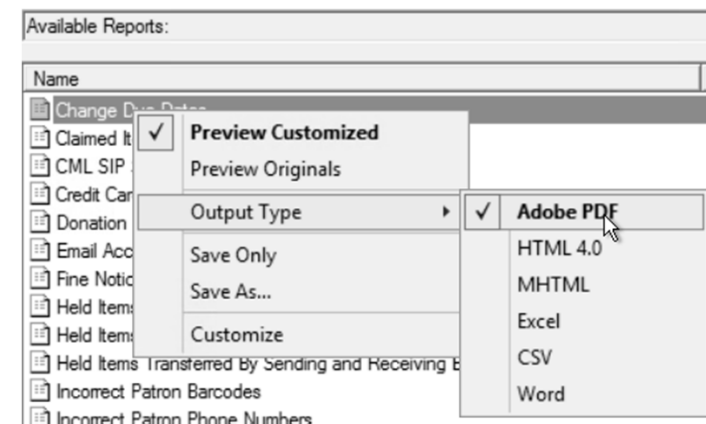|	Items	Checkouts	Renewals	Total Checkouts and Renewals
Audio Books	67	56	15	71
Fiction	464	443	160	603
Juvenile Audio Books	21	15	8	23
Juvenile Fiction	1945	2186	342	2528
Juvenile Music	2	1	1	2
Juvenile Non-Fiction	652	635	146	781
Juvenile Periodicals	3	1	2	3
Juvenile Video	76	75	16	91
Kits	11	10	2	12
Music	69	66	16	82
Non-Fiction	281	204	156	360

SSRS Web UI – Downloading the Report
Select the format AFTER you run the report!
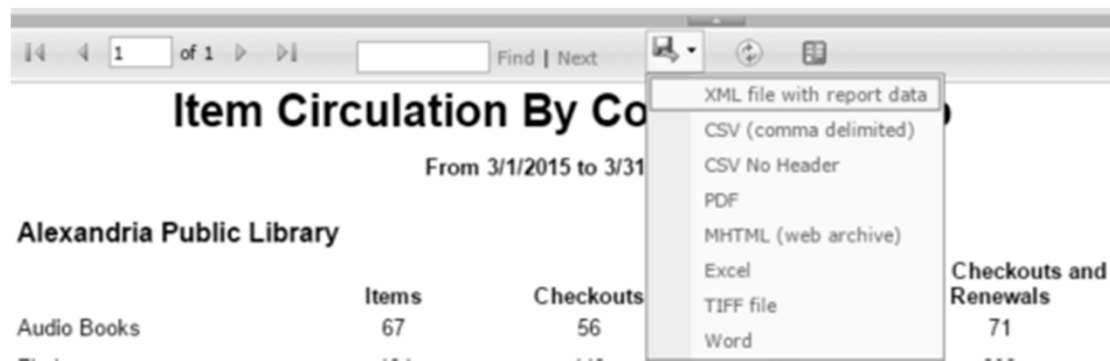
SSRS let's you select the format after you run the report and download multiple formats without re-running

Polaris toolbar requires you to select the output format FIRST

Scheduling Reports in SSRS

SSRS Web UI – Scheduling a Report
Click Report Name

SSRS Web UI – Subscribing
Fill in email, render format, schedule

Report Delivery Options

Specify options for report delivery.

Delivered by: E-Mail ▼

To: wosborn@clcohio.org

Cc:

Bcc:

(Use (;) to separate multiple e-mail addresses.)

Reply-To:

Subject: @ReportName was executed at @ExecutionTime

☑ Include Report   Render Format: PDF ▼

☑ Include Link

Priority: Normal ▼

Comment:

Subscription Processing Options

Specify options for subscription processing.

Run the subscription:

◉ When the scheduled report run is complete. [Select Schedule]
At 8:00 AM every Mon of every week, starting 4/10/2015

◯ On a shared schedule: Daily At 8am ▼
At 8:00 AM every day, starting 5/16/2011

SSRS Web UI – Subscribing
Fill in report parameters

Report Parameter Values

Specify the report parameter values to use with this subscription.

Locations

Alexandria Public Library

Begin Date

3/1/2015 12:00:00 AM   ☑ Use Default

End Date

3/31/2015 11:59:59 PM   ☑ Use Default

OK   Cancel

SSRS Web UI – My Subscriptions
View, edit or Delete Subscriptions

Avoid scheduling all SSRS reports as Admin

If an account is disable their <u>scheduled reports stop running</u>

There is no easy way to re-assign scheduled reports

Have <u>users schedule their own</u> reports or <u>create a service account</u> (SSRS_ScheduledReports_DONOTDELETEorDISABLE)

Data-driven subscriptions

Data-driven Subscriptions

Allow you to use database elements for <u>report</u> parameters

OR

Use database elements for <u>subscription</u> parameters

SQL Enterprise is <u>required</u>

Data-driven Subscriptions
Example Scenario

You have a report that counts the number of items in each status for a branch

Cataloging -> Item -> Item Status (built-in report)

You want to email each branch manager this report

The report should be specific to the manager's branch

Data-driven Subscriptions
Check Report Parameters

Data-driven Subscriptions
Finding the Manger's:
Email Address & Branch

Data-driven Subscriptions Manager's Info via SQL

Data-driven Subscriptions
Combining email & branch ID

Setting up the Data-Driven Subscription
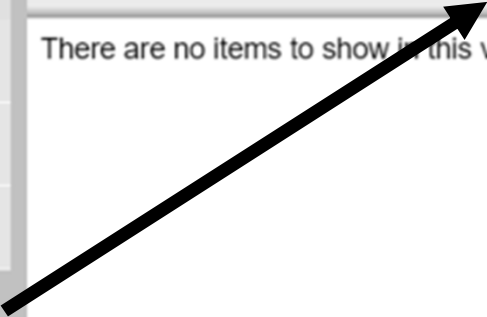
Data-Driven Subscriptions

Step 1 - Create a data-driven subscription: Item Status

Provide a description for this subscription, then choose a delivery extension and data source to use.

Description: Item Status report for each branch manager

Specify how recipients are notified: E-Mail   ▾

Specify a data source that contains recipient information:

- ◉ Specify a shared data source
- ◯ Specify for this subscription only

| < Back | Next > | Cancel | Finish |

Data-Driven Subscriptions
Selecting the Data Source

Step 2 - Create a data-driven subscription: Item Status

Browse folders to select a shared data source to use with this item.

Location: /Polaris/Polaris

- Home
  - Polaris
    - Acquisitions
    - Cataloging
    - Circulation
    - Custom
    - Notices
    - PAC
    - Public Services
    - Serials
    - System
    - **Polaris**

Data-Driven Subscriptions

Specify a command or query that returns a list of recipients and optionally returns fields used to vary delivery settings and report parameter values for each recipient:

```
select p.value as [TO], pu.organizationid as [GIS_MS_OrganizationList]
from polaris.polaris.usersppppp p
join polaris.polaris.polarisusers pu on pu.polarisuserid = p.polarisuserid
where p.attrid = 658 and p.polarisuserid in (132)
```
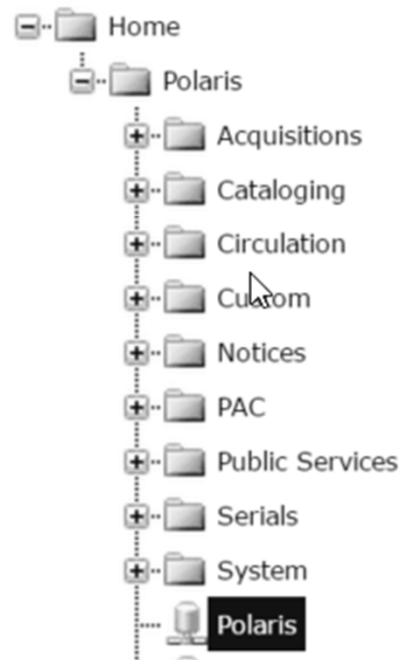
The delivery extension settings and report parameter values can use field values returned by the command or query. If there are field values that map to these settings, include the fields in your command or query.

The delivery extension has the following settings: TO, CC, BCC, ReplyTo, IncludeReport, RenderFormat, Priority, Subject, Comment, IncludeLink, SendEmailToUserAlias

The report takes the following parameters: GIS_MS_OrganizationList

Specify a time-out for this command: 30   seconds

Verify that the command is correct for the selected data source: Validate

✓ Query validated successfully.

Data-Driven Subscriptions
Selecting the Data Source

Step 4 - Create a data-driven subscription: Item Status

Specify delivery extension settings for Report Server Email

To

- ◯ Specify a static value:
- ◉ Get the value from the database: TO

Cc

- ◉ Specify a static value: admin@clcohio.org
- ◯ Get the value from the database: Choose a field
- ◯ No value

Data-Driven Subscriptions
Selecting the Data Source

Step 5 - Create a data-driven subscription: Item Status

Specify report parameter values for Item Status

Organization:

○ Specify a static value:

● Get the value from the database: GIS_MS_OrganizationList ▾

| < Back | Next > | Cancel | Finish |

Data-Driven Subscriptions
Selecting the Data Source

Step 6 - Create a data-driven subscription: Item Status

Specify when the subscription is processed.

Notify recipients:

○ When the report data is updated on the report server

○ On a schedule created for this subscription

● On a shared schedule | First day of the month at 2am ▾ |
At 2:00 AM on day(s) 1 of every month, starting 5/16/2011

| < Back | Next > | Cancel | Finish |

Data-Driven Subscriptions
Selecting the Data Source

Data-Driven Subscriptions
Selecting the Data Source

Fri 4/10/2015 2:13 PM

reports@mail139-240.wdc04.mandrillapp.com on behalf of

Item Status was executed at 4/10/2015 2:13:11 PM

To   Wes Osborn

If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictur

Item Status

Fairfield County Main Library

Status	Number of Items	Final Total	Provisional Total
Being Repaired	264	259	
Bindery	15	15	

Data-Driven Subscriptions
Selecting the Data Source

Data-Driven Subscriptions
Selecting the Data Source

Fri 4/10/2015 2:31 PM

reports@mail139-240.wdc04.mandrillapp.com on behalf of reports@prodd

Item Status was executed at 4/10/2015 2:31:08 PM

To ▪ Wes Osborn

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Item Status

Marysville Public Library

Status	Number of Items	Final Total	Provisional Total	Deleted Total
Being Repaired	39	39		
Claim Never Had	161	161		
Claim Returned	194	194		
Held	1,197	1,197		

Problems with Data-Driven Subscriptions

Finding the right report

     Consistent report parameters (e.g. library vs branch)

     Users are OK with the same settings (e.g. time period)

     Consider a new table to store DDS settings

Shift the management burden to Sys Admin

     You have to create AND maintain the reports

Building Reports in SSRS

It's time to enter the belly of the beast

Google: Report builder 2014

Microsoft® SQL Server® 2014 Report Builder

Select Language: English ▼   **Download**

Report Builder provides a productive report-authoring environment for IT professionals and power users. It supports the full capabilities of SQL Server 2014 Reporting Services.

⊕ Details

⊕ System Requirements

⊕ Install Instructions

⊕ Additional Information

Don't use Visual Studio
Way too complex
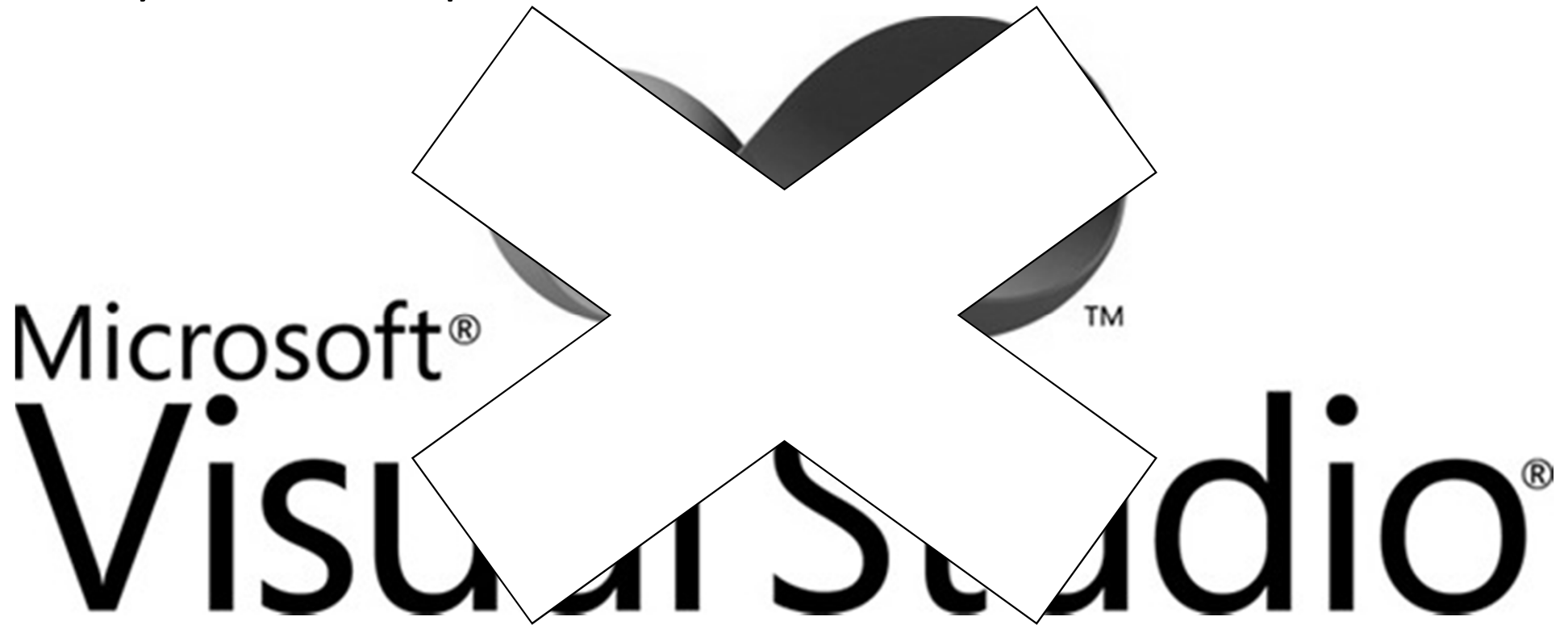
Create a personal DB user account
Use Windows authentication
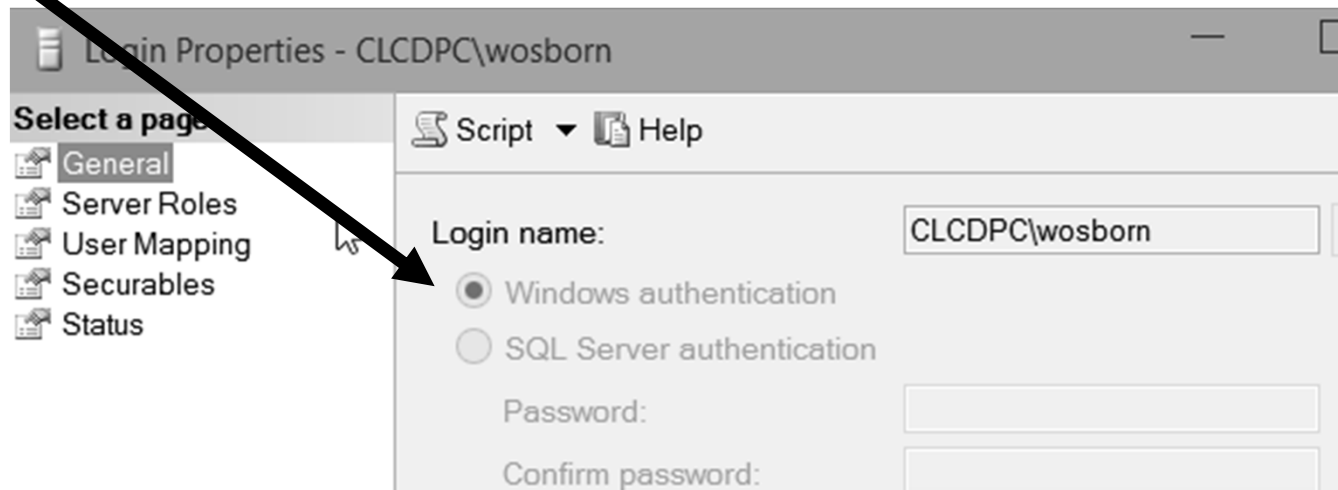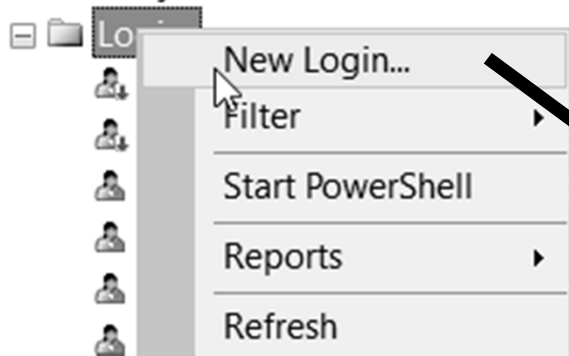
Assign user account <u>sysadmin</u> Server Role
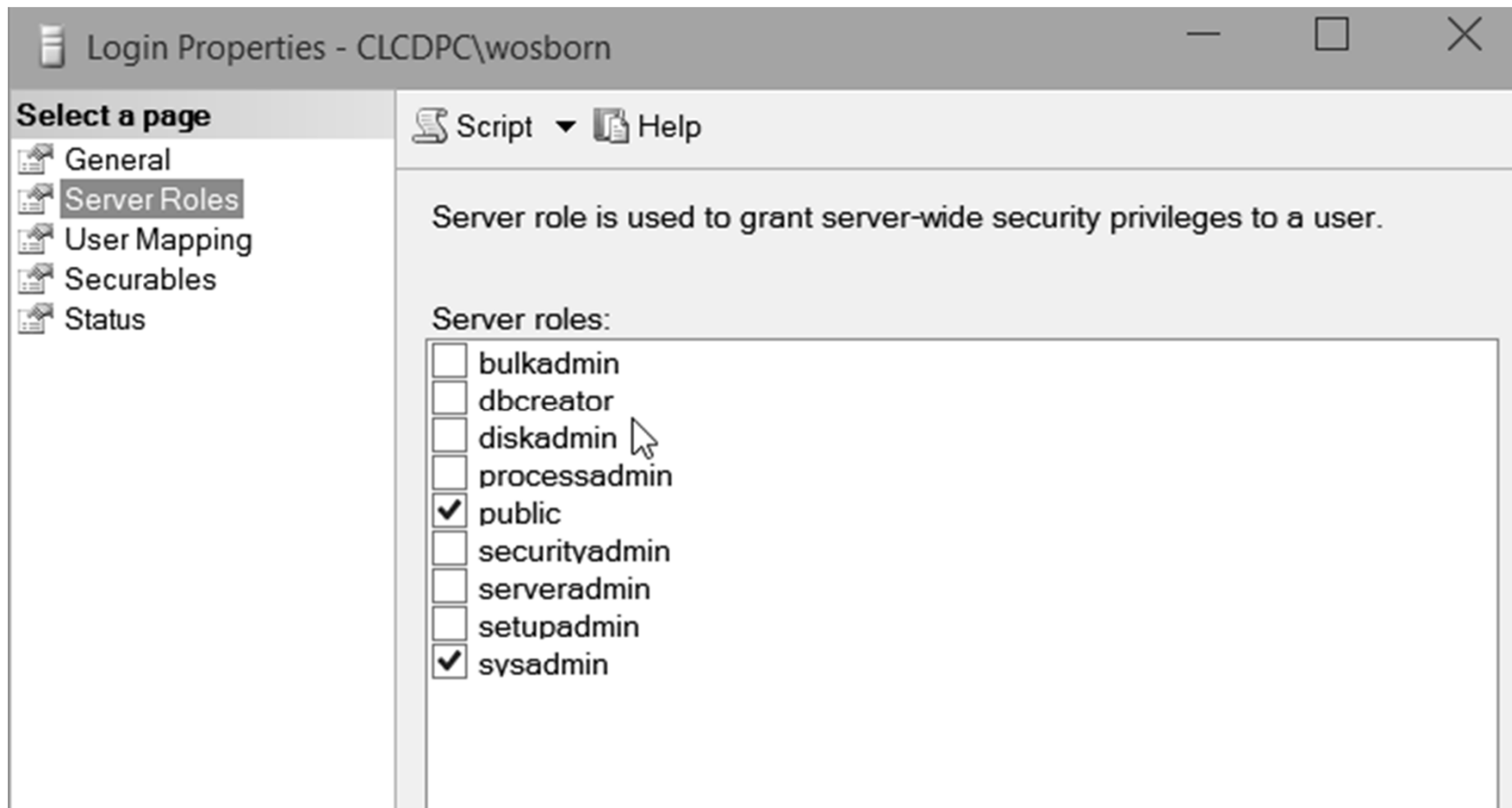
Separate SSRS DB Server?

Repeat the steps to create a login on that server too.

Customize an existing report

Adding Last Use branch parameter to In-Transit report

Opening an existing report to customize

Connecting to your SSRS server

We're connecting to the API service
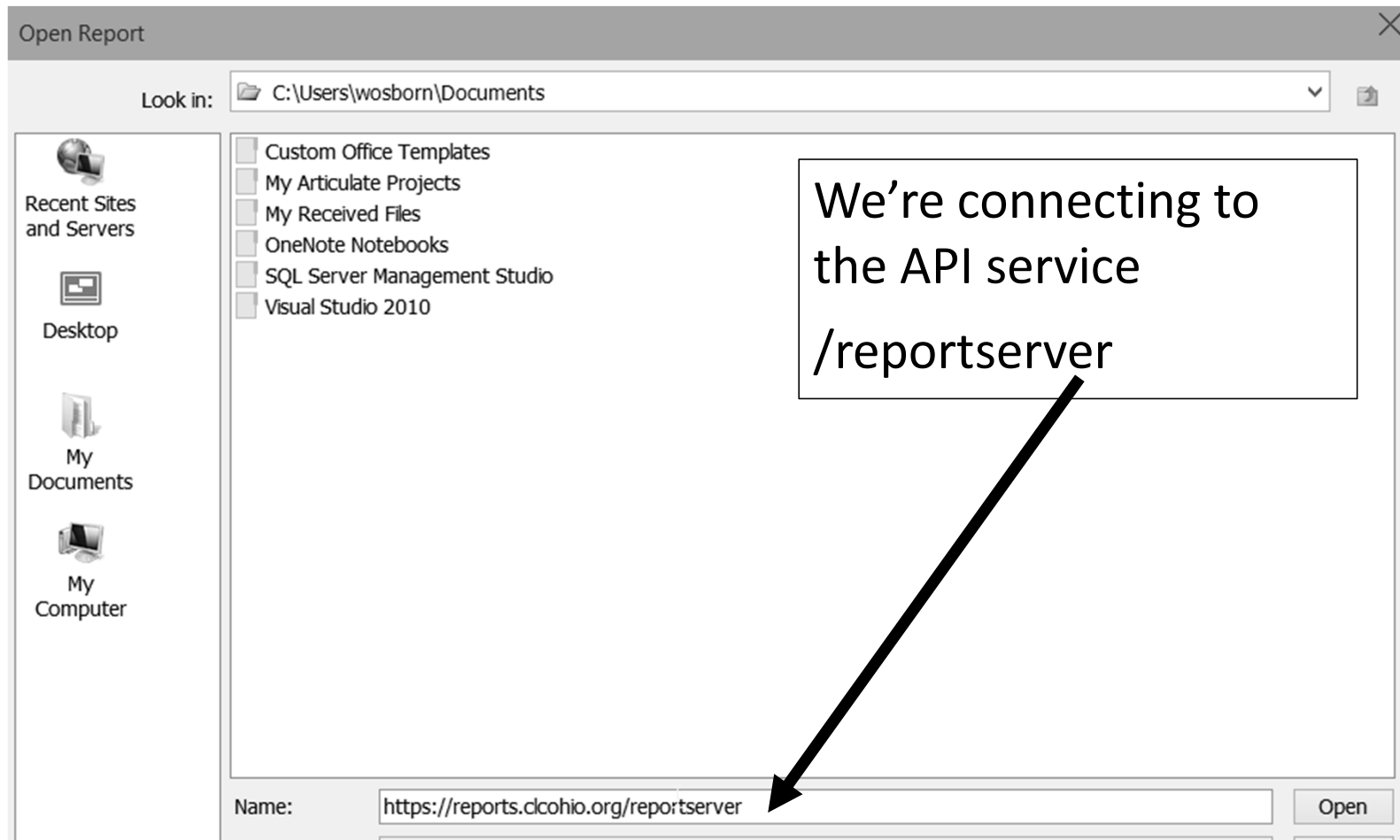
/reportserver

Find the report to customize and Open it

Open Report

Look in: 🗁 https://reports.clcohio.org/reportserver/Polaris/Cataloging/Item

- Recent Sites and Servers
- Desktop
- My Documents
- My Computer

- 📄 Call Number List
- 📄 Claimed Items
- 📄 Collection Disposition by Material Type
- 📄 Collection Material Type Analysis
- 📄 Collection Value By Organization
- 📄 Deleted Item Transaction History
- 📄 In-Transit Items
- 📄 Inventory Exception - Incorrect Status
- 📄 Inventory Exception - Misshelved
- 📄 Inventory Shelflist
- 📄 Item Records by Funding Source and Stat Code
- 📄 Item Records That Do Not Display In PAC
- 📄 Item Records Without Barcodes
- 📄 Item Status
- 📄 Lost and Missing Items

SSRS Design Mode

Save the report to your custom folder

Adding a new parameter

Built-in Fields
Parameters
    dtBeginDate
    dtEndDate
Images
Data Sources
Datasets
    dsInTransitItems
        CallNumber
        Barcode
        BrowseAuthor
        BrowseTitle
        DestinationBranch
        DateInTransit
        ItemRecordID
        LastUseBranch
        cBranch
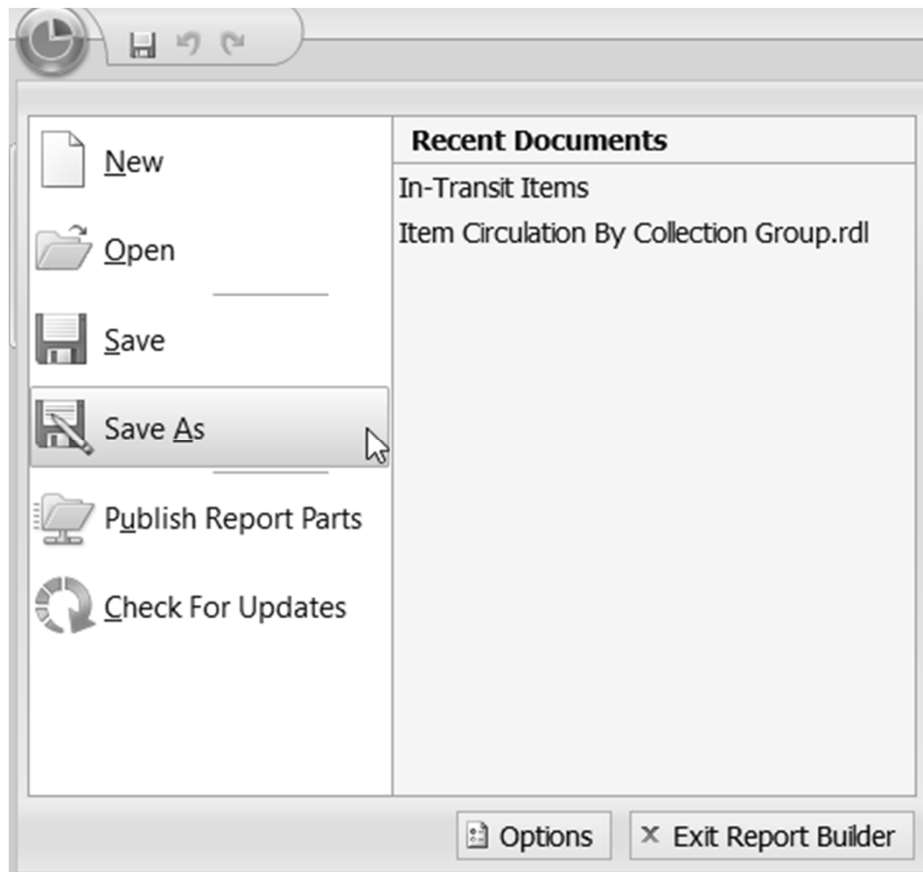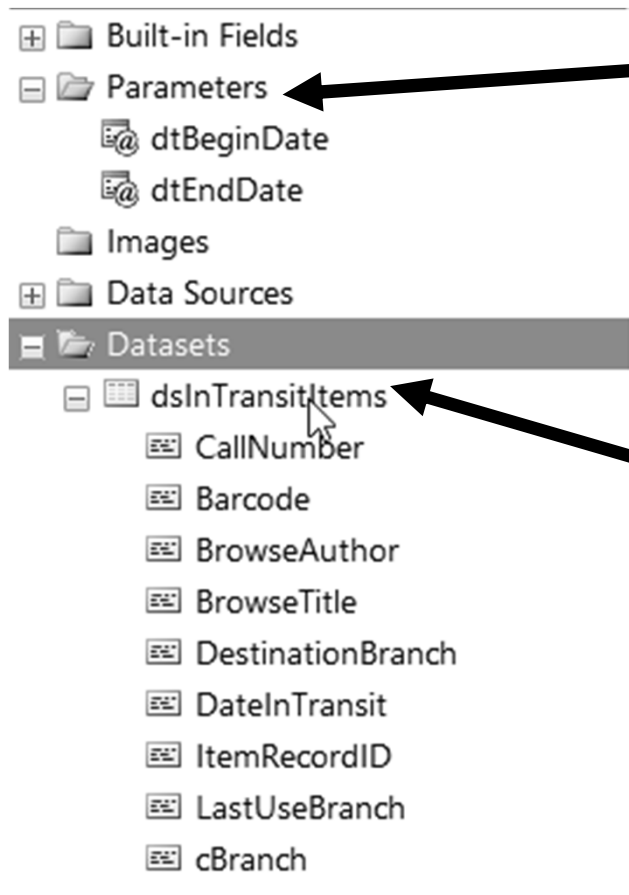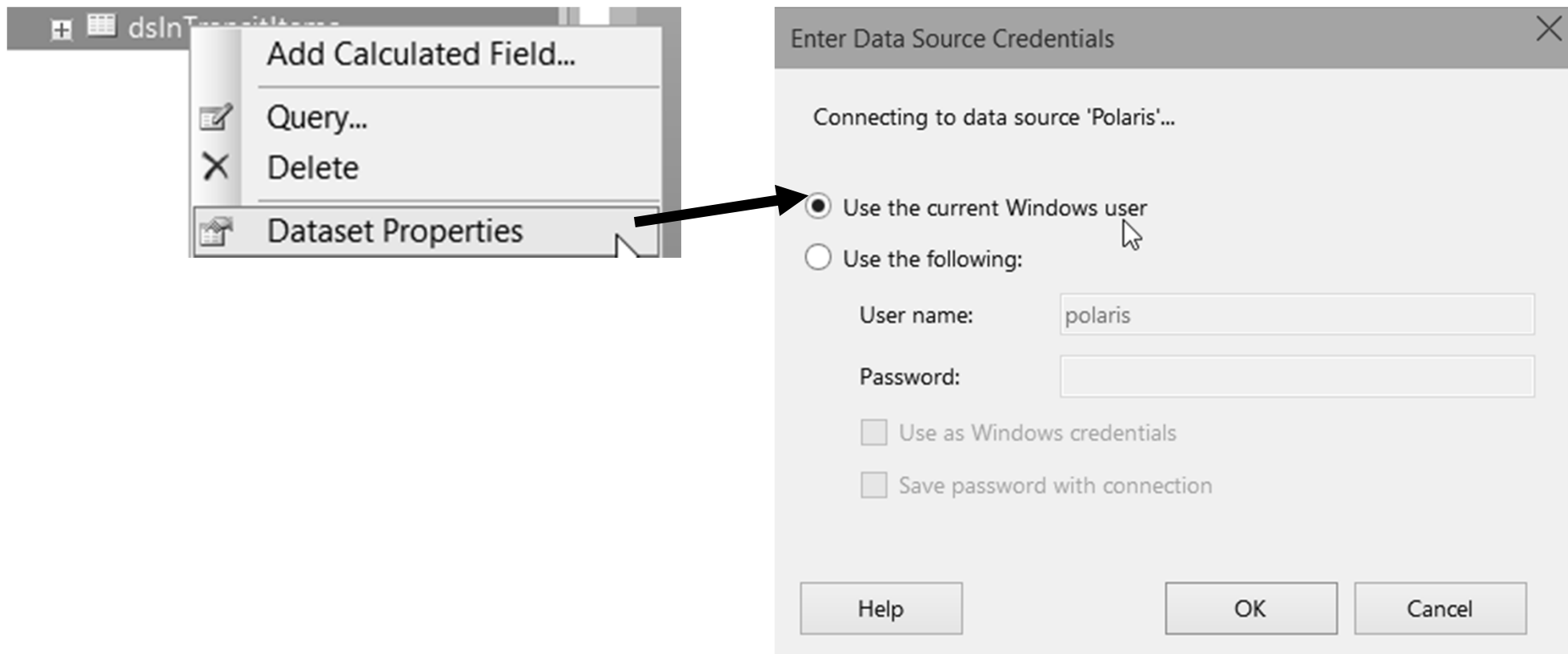
We need to add something new to the Parameter list

First, the SQL behind the scenes must be adjusted to accept this parameter

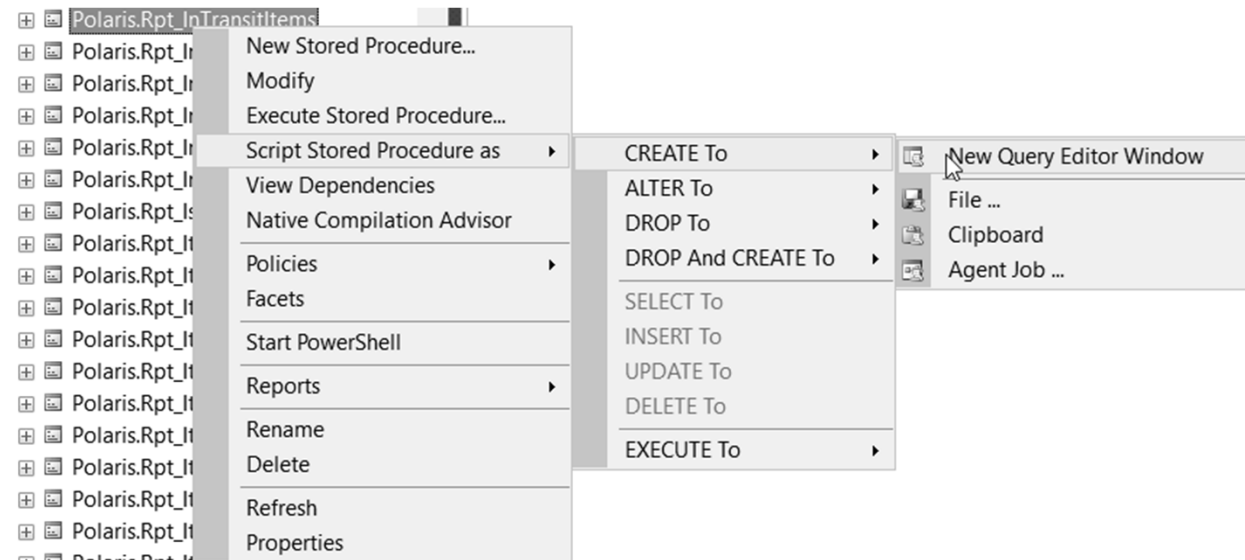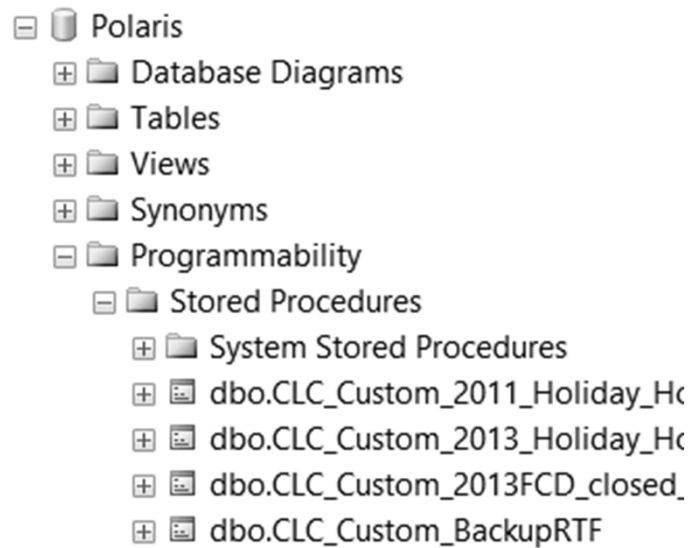# Setting up your logins, means less typing!

Most Polaris reports use Stored Procedures

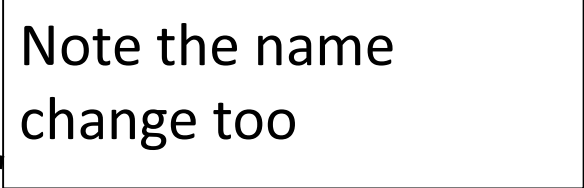# Copy the Polaris Stored Procedure

Adding LastUseBranchID as a stored procedure parameter and to the WHERE clause

```
-------------------------------------------------------------------------------------
--   Rpt_InTransitItems
--       This stored procedure will report items with a status of either in-transit or transferred
-- Edited: 2015.04.10 by Wes to accept the LastUseBranchID as limiter
-------------------------------------------------------------------------------------

CREATE PROCEDURE [Polaris].[CLC_Custom_Rpt_InTransitItems]
    @dtBeginDate datetime,
    @dtEndDate datetime,
    @LastUseBranchID int
```

Note the name change too

```
    ON CIR.InTransitSentBranchID = SentOrgInTransit.OrganizationID
WHERE
        CIR.ItemStatusID IN (5, 6)
        AND CIR.RecordStatusID = 1
        AND CIR.InTransitSentDate BETWEEN @dtBeginDate AND @dtEndDate
        AND CIR.InTransitSentBranchID = @LastUseBranchID
```

Update the name and refresh the fields

Query type:

○ Text ○ Table ● Stored Procedure

Select or enter stored procedure name:

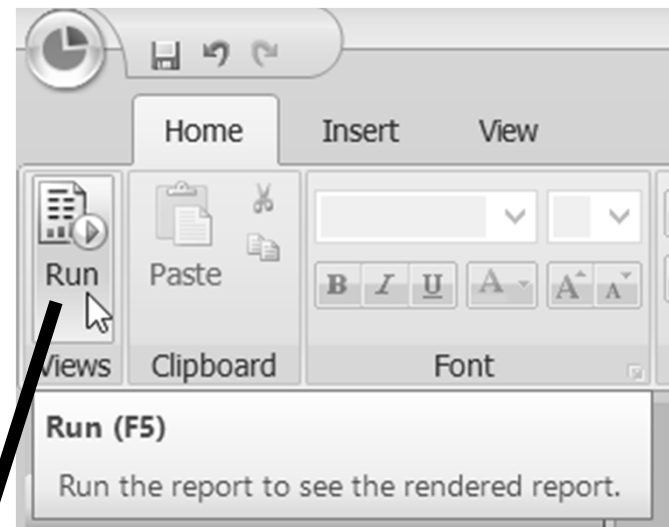Polaris.CLC_Custom_Rpt_InTransitItems

Query Designer... | Refresh Fields
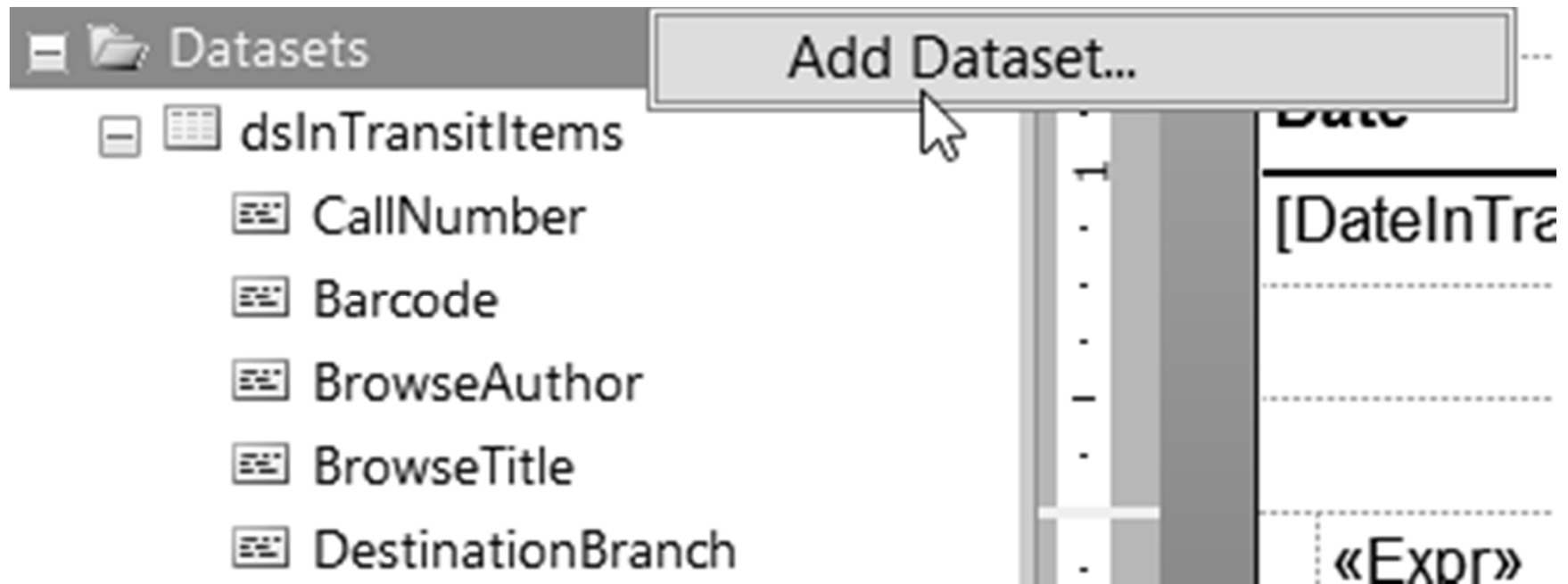
Great! Now we're all done right?

Parameters
- dtBeginDate
- dtEndDate
- LastUseBranchID

Do staff know their branch ID?

Home   Insert   View

Run   Paste

Views   Clipboard   Font

Run (F5)

Run the report to see the rendered report.

Begin Date   3/1/2015   End Date   4/10/2015

Last Use Branch ID   9

Adding a new dataset for branch names

Adding a new dataset for branch names

Choose a data source and create a query.

Name:

BranchNameList

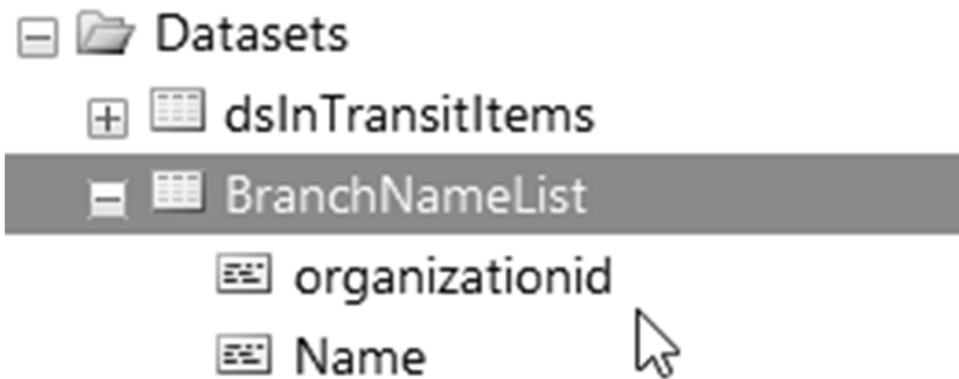○ Use a shared dataset.
● Use a dataset embedded in my report.

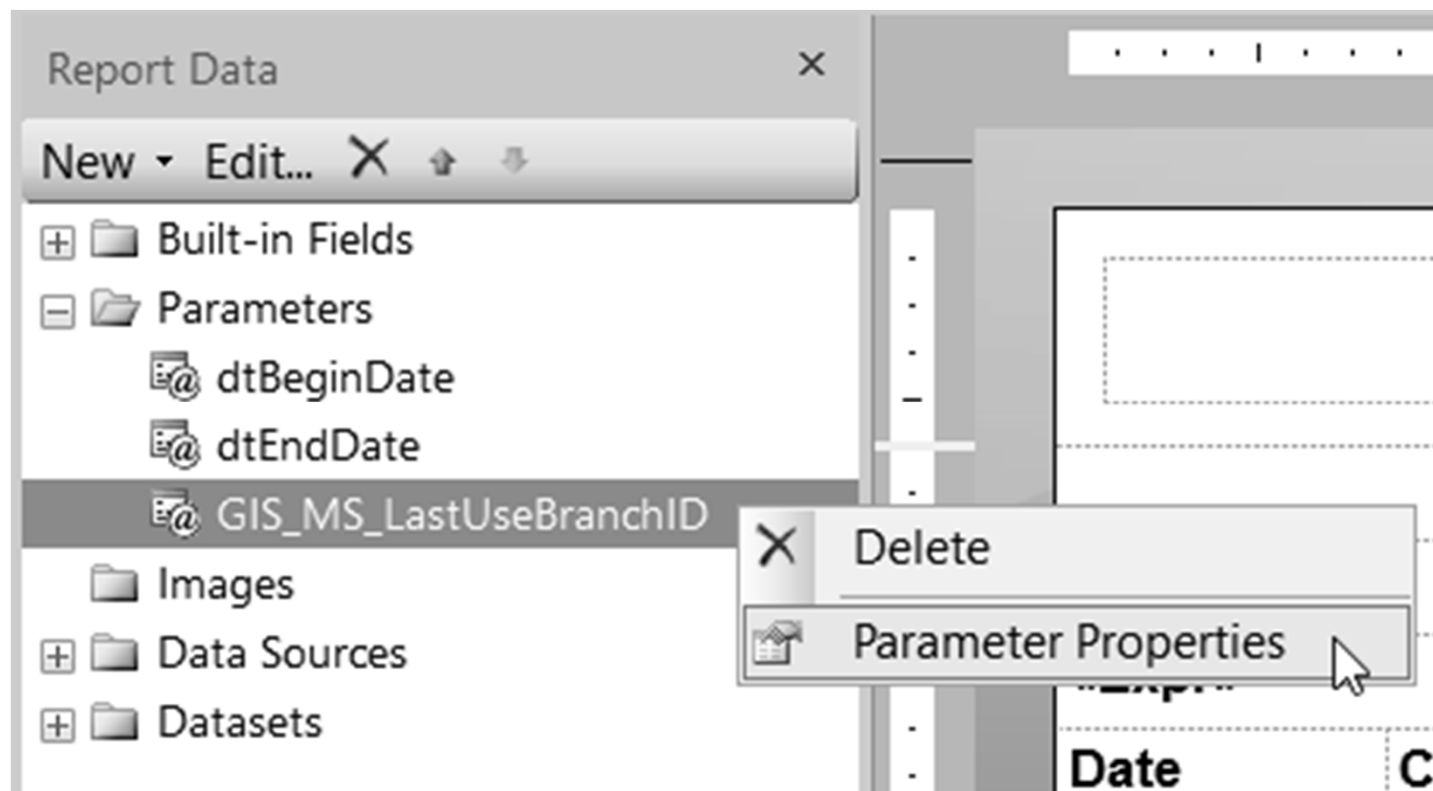Data source:

Polaris   ∨   New...

Query type:

● Text   ○ Table   ○ Stored Procedure

Query:

```
select organizationid, Name
from polaris.polaris.organizations
where organizationcodeid = 3
order by Name
```

Don't forget to sort the results using ORDER BY

Results from dataset

Editing the Last Use Parameter to use SQL for the list of branch names

Pointing the parameter to a dataset
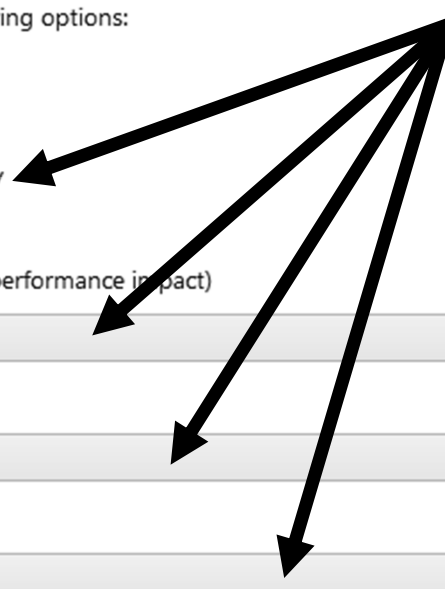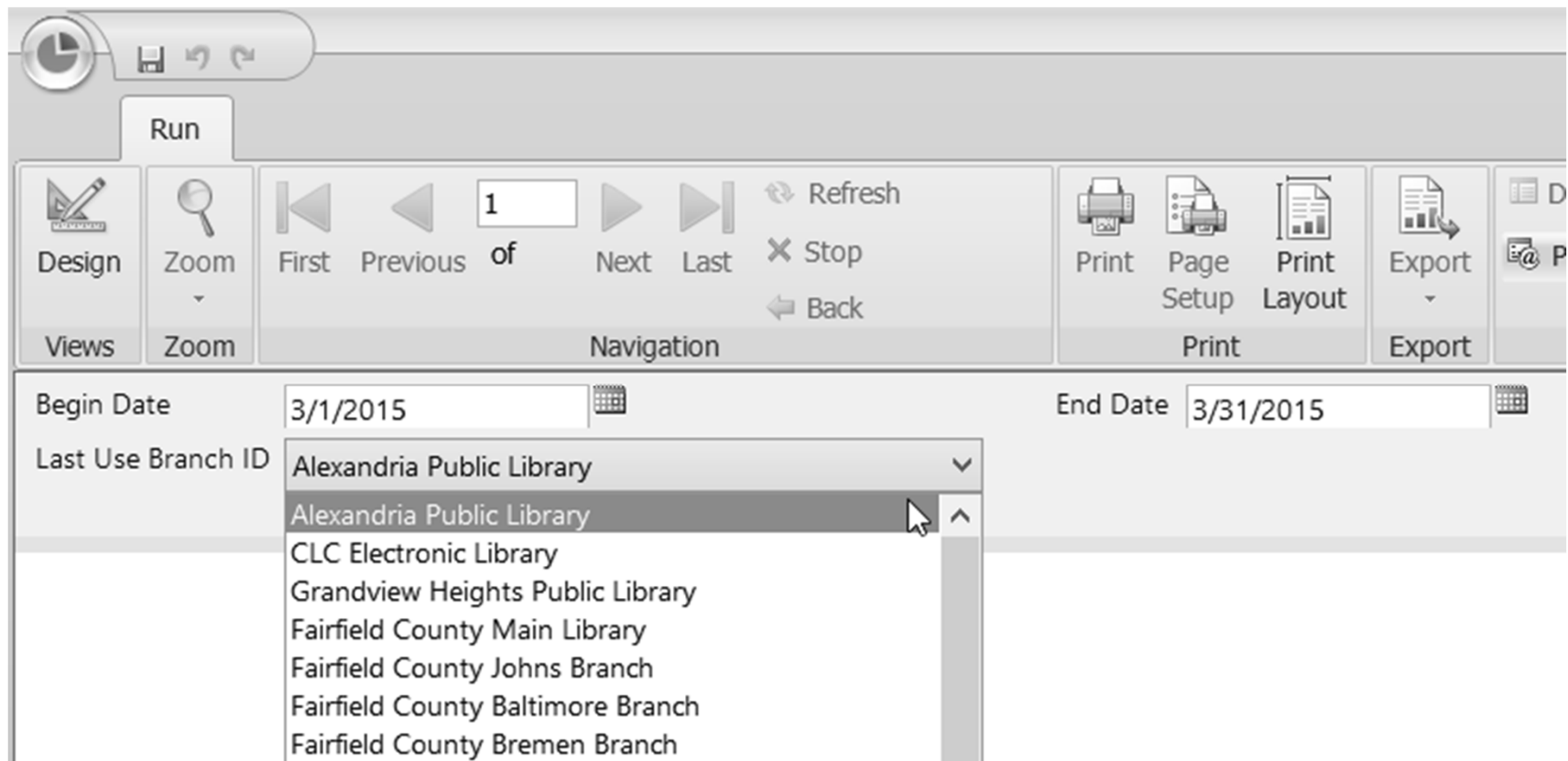
Yeah! A list of branch names

Using SSRS Expressions fx
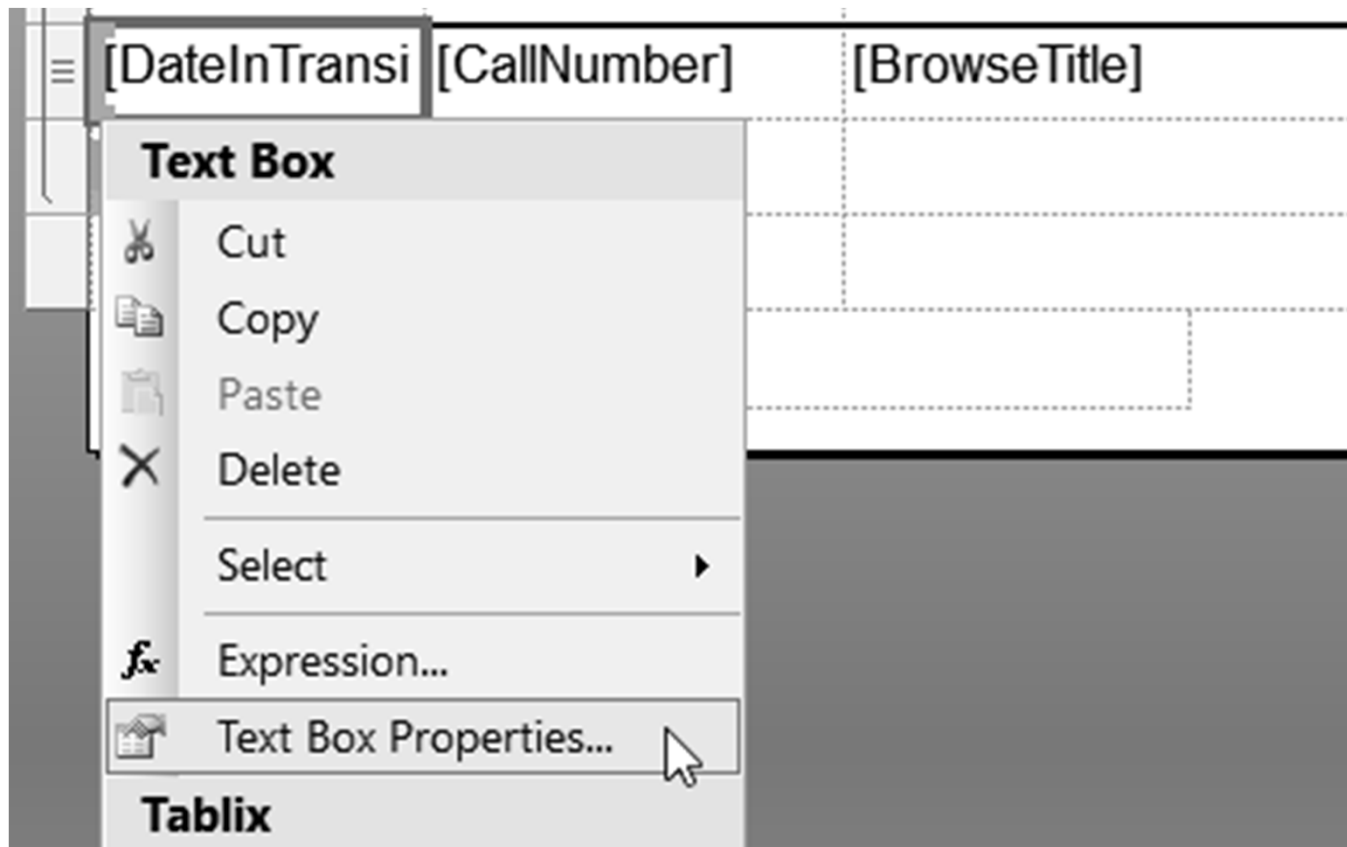
Format output data

  Change colors

  Change fonts

Manipulate input data
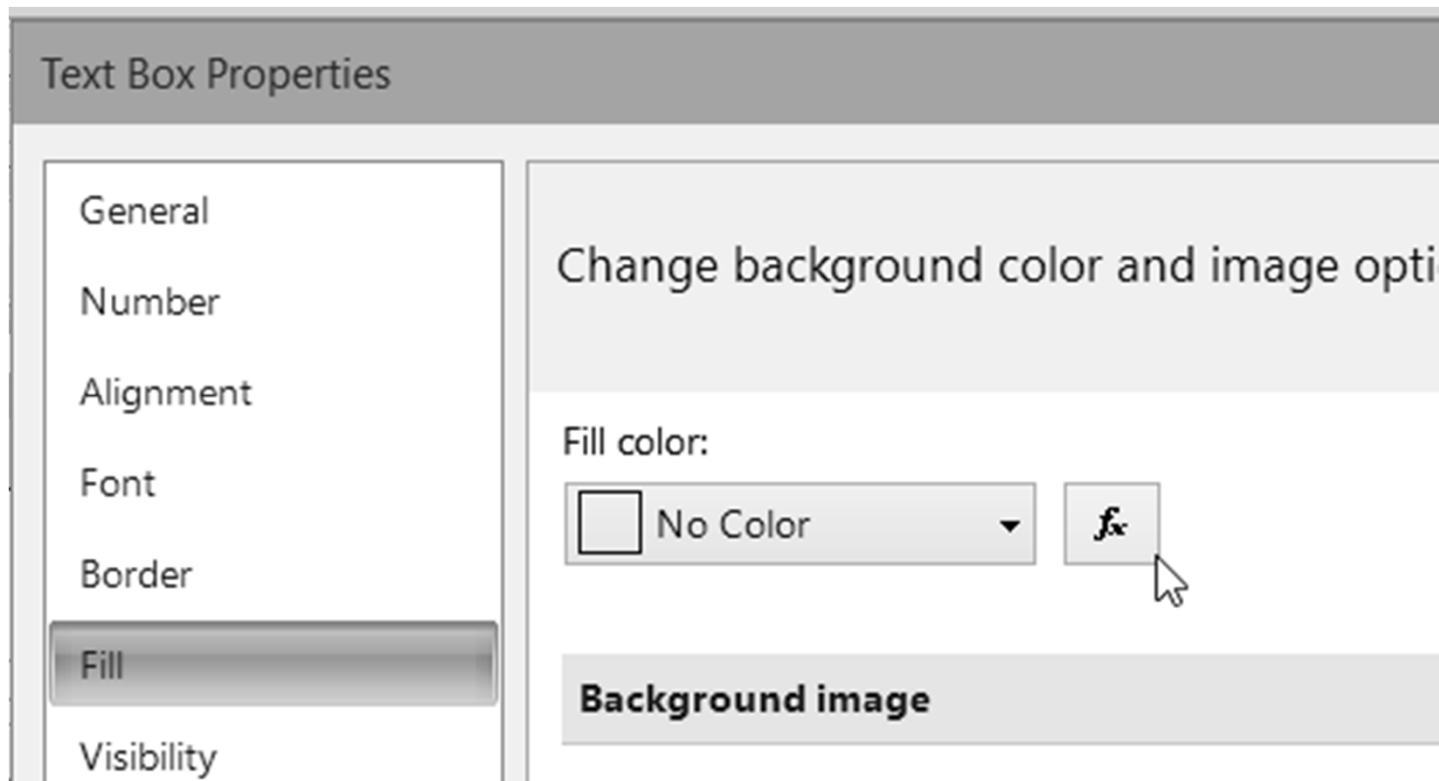
  Setting defaults

  Run verification checks

Format Output – Change Color

Using fx to setup conditional formatting

$\int x$ = Full "power" of Visual Basic Available

Expression ✕

Set expression for: BackgroundColor

```
=iif(Fields!DateInTransit.Value < DateAdd("d",-10, Globals!ExecutionTime), "Tomato", "White")
```
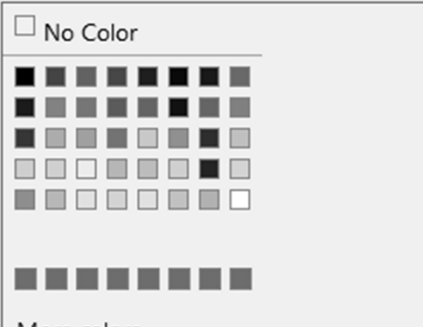
Category:
- Constants
- Built-in Fields
- Parameters
- Fields (dsInTransitItems)
- Datasets
- Variables
- ⊞ Operators
- ⊞ Common Functions

Item:
- <All>

Values:
- ☐ No Color

More colors...

Any dates older than 10 days are in red

Begin Date 2/1/2015 End Date 4/11/2015

Last Use Branch Fairfield County Main L ∨

Sent From: Fairfield County Main Library

Date	Call Number	Title	Author	Item Barcode	Destination
2/6/2015	TGN STA	Star wars legacy. Volume nine, Monster	Ostrander, John.	31870007797722	Grandview Heights Public Library
2/12/2015	Picture Aue	Splat the Cat : fishy tales	Auerbach, Annie.	31868015858650	Fairfield County Johns Branch
2/13/2015	Mystery Paperbacks	The burning soul	Connolly, John, 1968-	31868015518213	Fairfield County Bremen Branch
2/18/2015	Large Print Inspirational Bla	Night light	Blackstock, Terri, 1957-	31868012133917	FCDL Outreach Services
2/25/2015	CD Children's B	More please!	Babypants, Caspar.	31868013483311	Fairfield County Johns Branch
3/10/2015	DVD Family Films/G	Geek charming		31868014194404	Fairfield County Baltimore Branch
3/11/2015	CD Fiction Ile	Natchez burning	Iles, Greg.	31868014361680	Fairfield County Johns Branch
3/14/2015	J Fiction Lowry	The giver	Lowry, Lois.	1336198499	CML Technical Services
3/16/2015	MP J Fiction Cur 787	The Watsons go to Birmingham--1963	Curtis, Christopher Paul.	31868011109025	Pickerington Public Library
3/21/2015	CD J 567.9 BAR	Dinosaur bones	Barner, Bob.	1247257163	WL Northwest
3/21/2015	DVD Family Films/S	16 wishes		31868014152097	Fairfield County Bremen Branch
3/26/2015	CD 320.520973 S264s	Stop the coming civil war : my Savage truth	Savage, Michael, 1942- author.	1402405417	CML Dublin
4/2/2015	DVD Classic Films/S	The searchers		31868014303724	Fairfield County Bremen Branch

Setting defaults for the date parameters
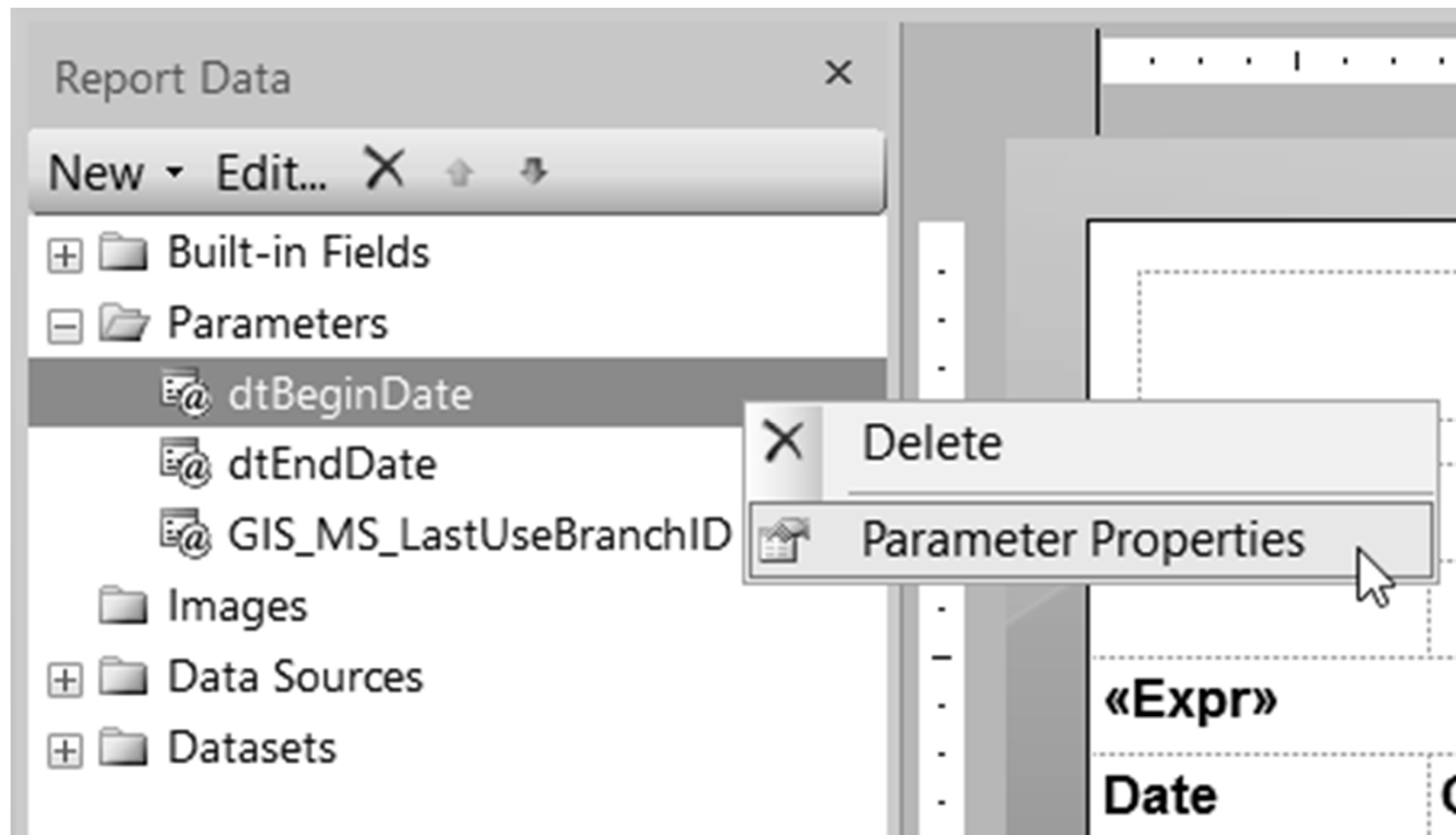
Setting up date parameter defaults
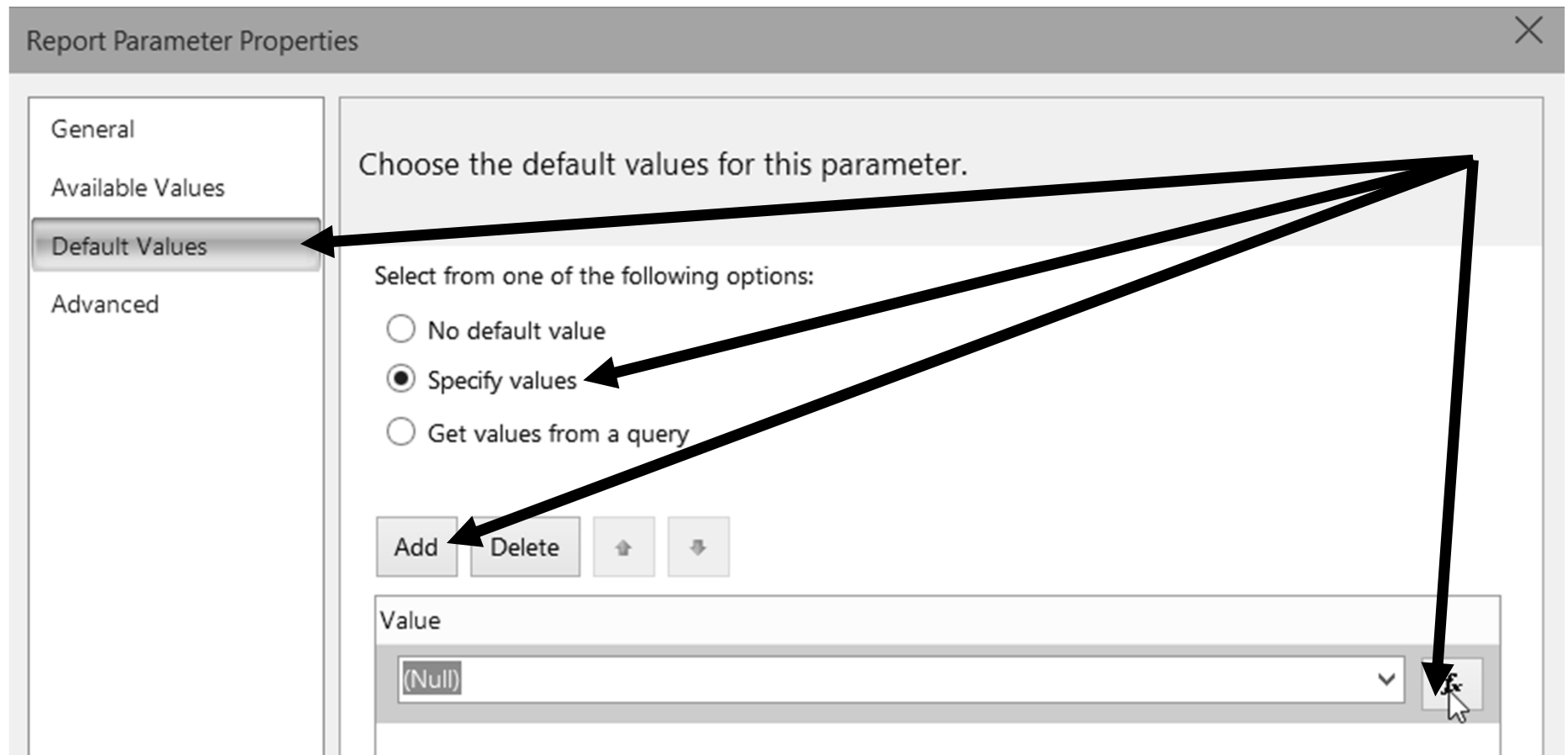
Setting default to
First and Last day of previous month

Expression   ✕

Set expression for: Value

=dateadd("m",-1,dateserial(year(Today),month(Today),1)) <<Start of previous Month

Expression   ✕

Set expression for: Value

=dateadd("s",86399, dateadd("d",-1,dateserial(year(Today),month(Today),1))) <<End of previous month

Defaults (Remember In SSRS Web UI Only)

Home > Polaris > Custom > CLC Electronic Library > In-Transit Items - Wes   Home | My Subscriptions | Site Settings |
IUG 2015   Help

Begin
Date   3/1/2015   [📅]   End   3/31/2015 11:59:59 PM   [📅] | View Report
                                   Date

Last
Use   [   ] [▾]
Branch

Creating a new report

Creating a report from scratch

Build SQL statement in SQL Server Management Studio

     What will report display
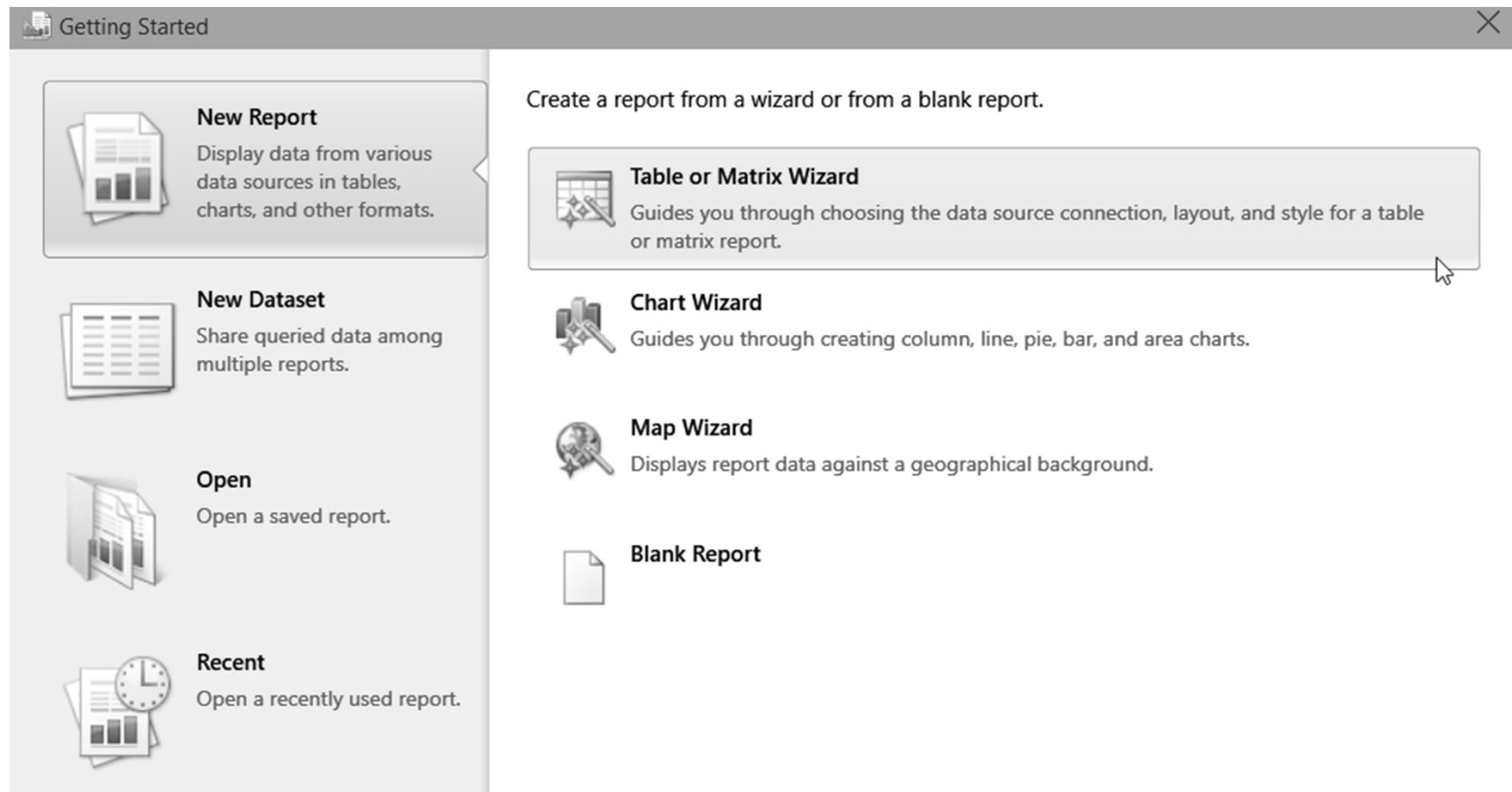
     What parameters will be required

SSRS Expressions

     Any formatting requirements

     Any defaults for parameters

Using the Wizard to create a new report

Dataset = SQL to be used for report

Browse...

⦿ Create a dataset

Help   < Back   Next >   Cancel
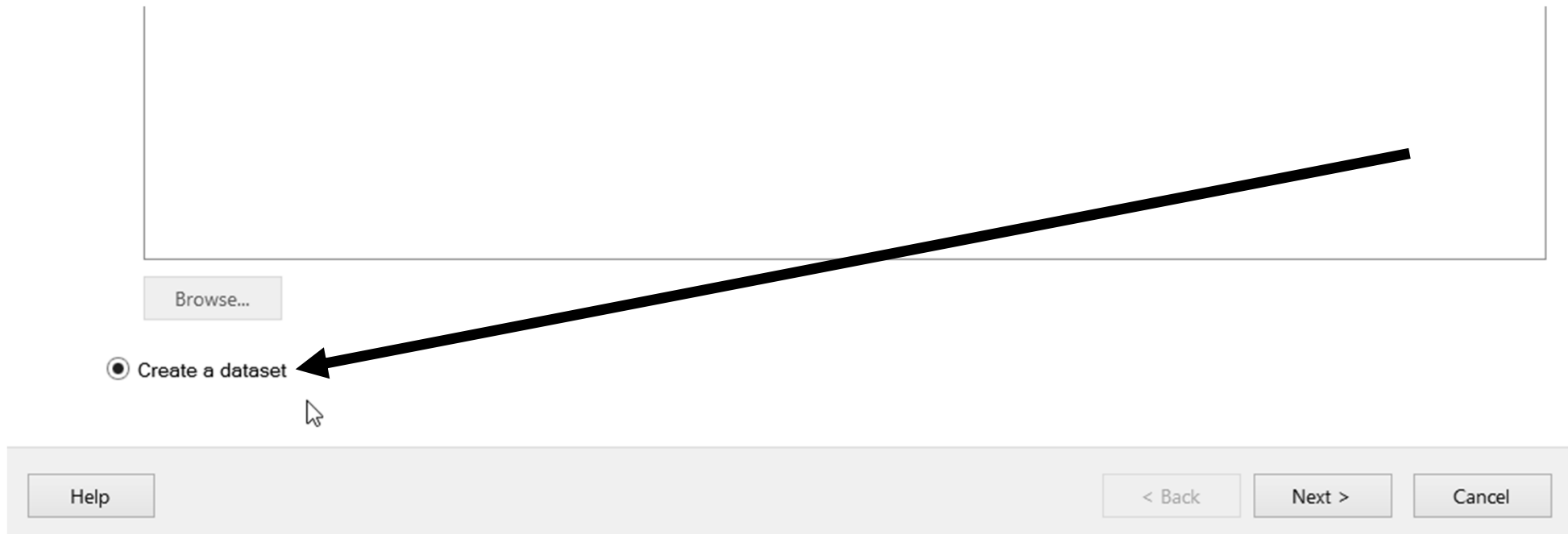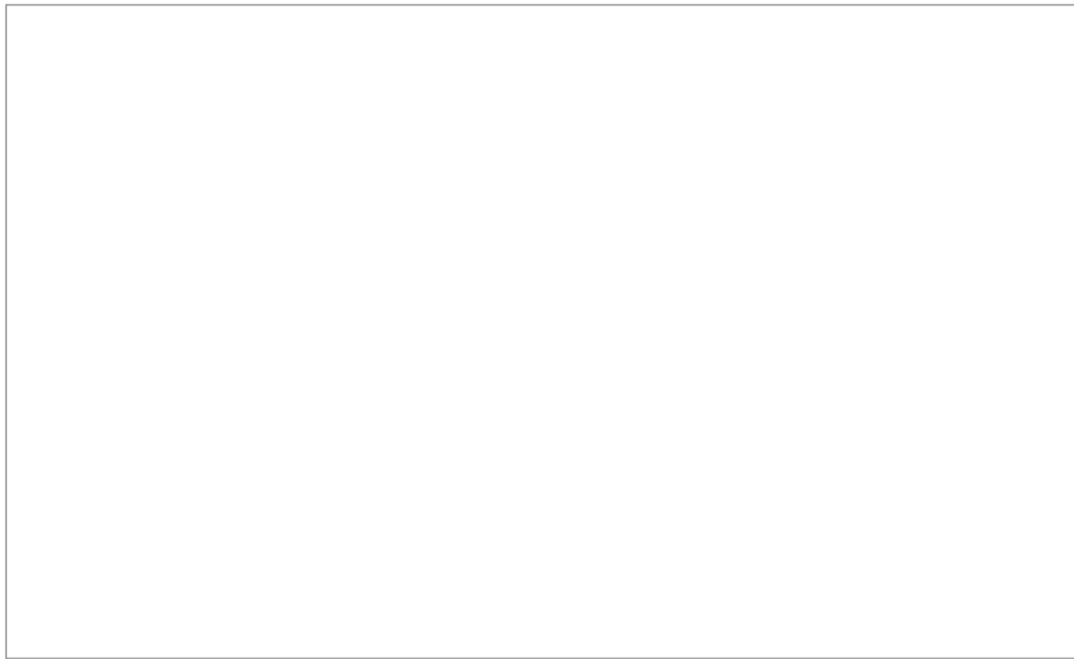
Data Source = Location of data (database)

Choose a connection to a data source

Choose a published data source, or create a connection for use only in this report.
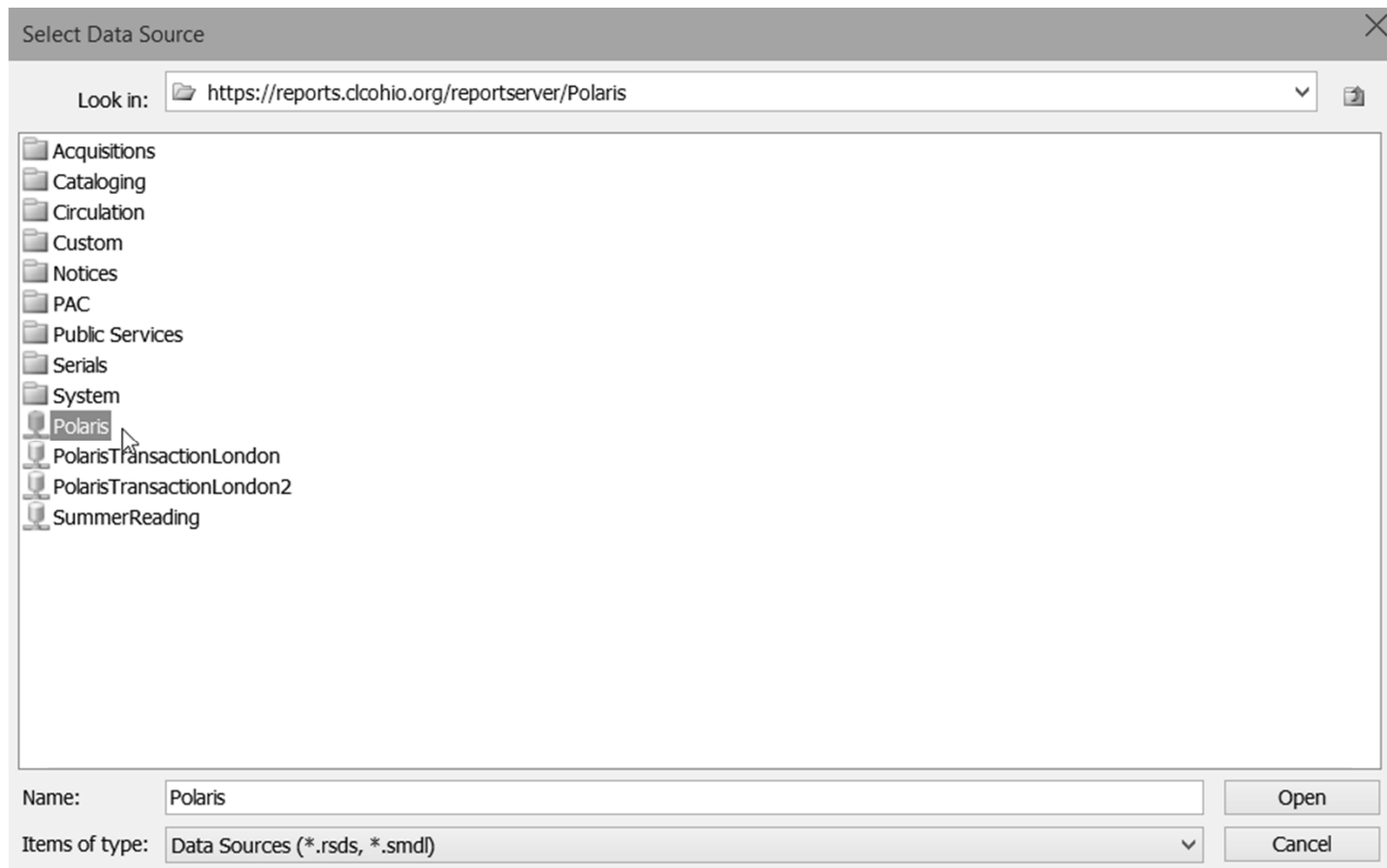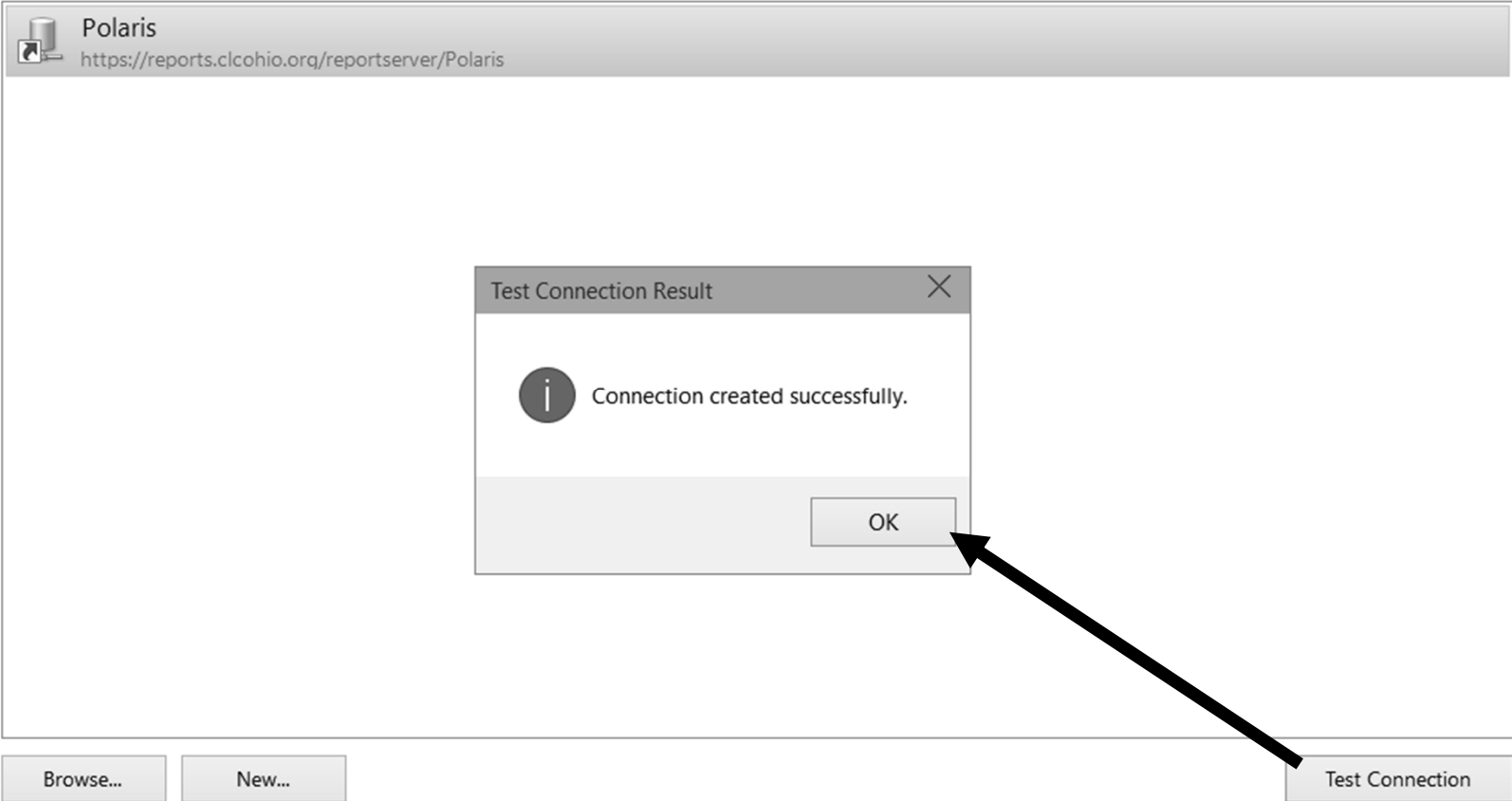
Data Source Connections:

[Browse...] [New...]

Polaris Data Source provides
Access to Polaris and PolarisTransactions
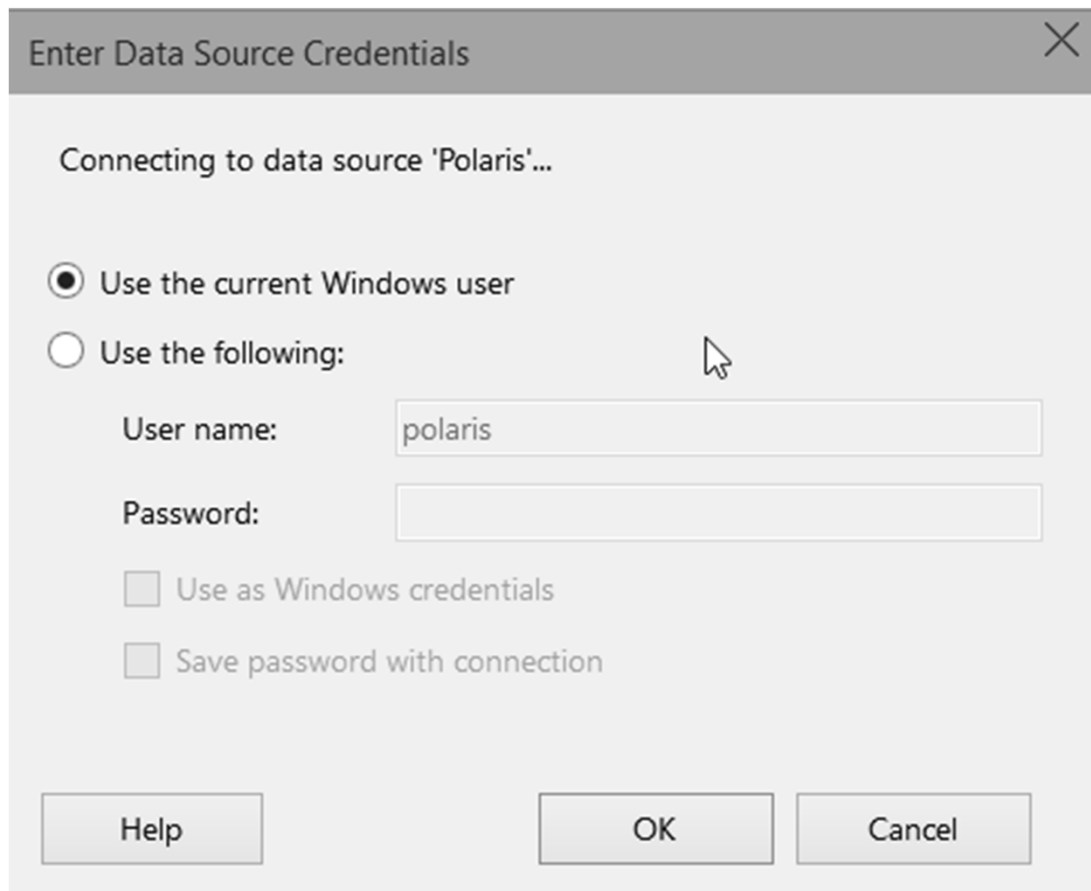
Testing ability to connect to database

Setting up your logins, means less typing!

Report will use SQL statement as data source

Design a query

Build a query to specify the data you want from the data source.

Run SQL to verify that it is working properly

Choosing display columns and groupings

Arrange fields

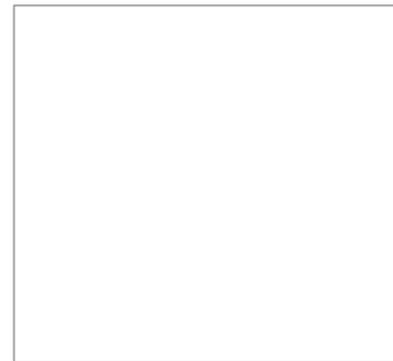Arrange fields to group data in rows, columns, or both, and choose values to display. Data expands across the page in column groups and down the page in row groups. Use functions such as Sum, Avg, and Count on the fields in the Values box.

Available fields

BranchName
PatronCode
NumPatrons

Column groups

Row groups

BranchName

Σ Values

BranchName	▼
PatronCode	▼
Sum(NumPatrons)	▼

Basic report formatting (colors, etc.)

Choose the layout

If you choose to show subtotals and grand totals, you can place them above or below the group. Stepped reports show hierarchical structure with indented groups in the same column.

Options:

☑ Show subtotals and grand totals

    ◉ Blocked, subtotal below

    ○ Blocked, subtotal above

    ○ Stepped, subtotal above

☑ Expand/collapse groups

Preview

Branch	Branch	Patron Code	Num
[BranchName]	[BranchName]	[PatronCode]	[Sum(NumPatr
			[Sum(NumPa
Total			[Sum(NumPa

Choose a style

Styles feature different fonts and color schemes, but do not affect the basic layout. You can customize the style after you finish the wizard.

Styles:

Corporate
Forest
Generic
Mahogany
Ocean
Slate

Preview

Branch	Branch	Patron Code	Num
[BranchName]	[BranchName]	[PatronCode]	[Sum(NumPatr
			[Sum(NumPa
Total			[Sum(NumPa

Report Output
Grouping works in SSRS or Excel

Which patron codes were selected?

Add text boxes; drag parameter into textbox
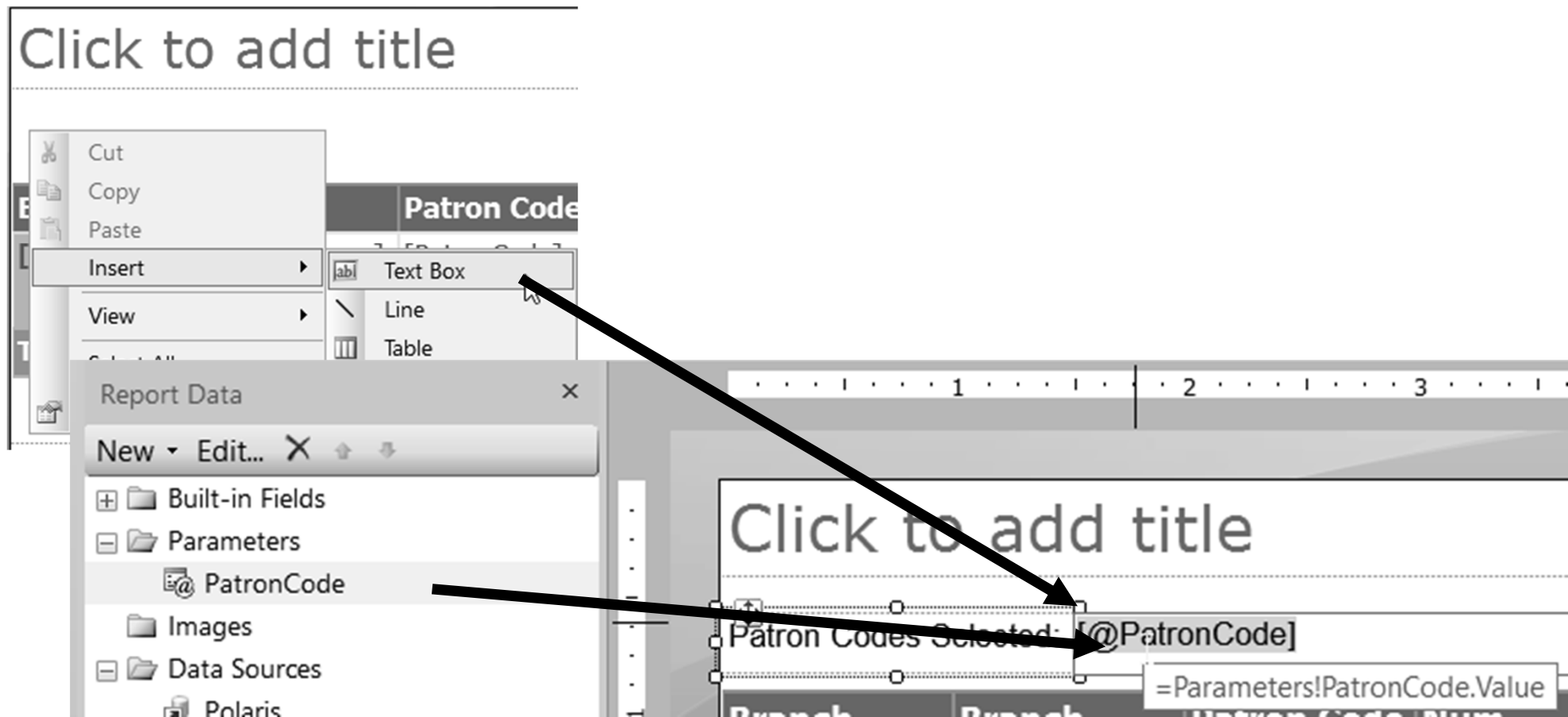
Patron codes accepts multiple values

Change name, data type, and other options.

Selected Patron Codes: #Error

Branch Name	Branch Name	Patron
⊞ Alexandria Public Library		

Name:

PatronCode

Prompt:

Please select patron codes

Data type:

Text ⌄

☐ Allow blank value ("")

☐ Allow null value

☑ Allow multiple values

Adjust the expression

Change label, value, and markup options.

Label:

Value:

[@PatronCode]   fx

Tooltip:

Expression

Set expression for: Value

=Join(Parameters!PatronCode.Value, ",")

Multi-value parameters
now show on report output

Please select patron codes   Full Access, Homeboun ▼

Selected Patron Codes: Full Access,Homebound

Branch Name	Branch Name	Patron Code	Num Patrons
⊞ Alexandri a Public Library			2479

Common data to include on a report

Any input values used to generate the report

      Particularly any date ranges

The time the report was run

The report name

      Can use the saved "file name" of the report

      Report folder name to distinguish multiple reports

Manipulating built-in reports

The secret world of Polaris Internal reports

Internal Polaris Reports

Import reports

Bulk Change reports

Acquisitions workslips

Polaris email notices

The bib import "report"

Import Report

File: C:\Users\lking\Downloads\vendor-20150410064106.mrc

Import type: Full   **Source:** MARC File

Submitted date: 4/10/2015 2:41:34 PM   **Scheduled date:**

Profile used: LCK brief bibs import

Branch: CML Tech Services

User: lking   **Stopped by user:** No

Workstation: TSDED1GKXTG1   **Stopped by system:** No

Vendor account: (None)

Bibliographic save option: Save as final

Record owner: Central Library Consortium   **Display in PAC:** Yes

Delete data: No

MARC validation: No MARC validation

Authority control: No authority control

Duplicate detection: Perform duplicate detection. If errors are found, reject duplicate and automatically retain MARC tags.

Use system duplicate rules: Yes   **Retain data:** Yes   **Use system retention rules:** No

Bibliographic duplicate criteria

Built-in Polaris "Reports"

SSRS used behind the scenes in most Polaris printing

Polaris -> System -> Internal (using SSRS Web UI)

Replacing Built-In Reports

Use <u>same name</u> as built-in report and place custom version in:

Custom -> Branch Name -> System -> Internal

Custom -> All -> System -> Internal

Home > Polaris > Custom > CML Tech Services > System

CLC SQL Server Report Server
Internal

| ✕ Delete | | 📋 Move | | 📁 New Folder | | 🖥 New Data Source |

☐	Type	Name ↓
☐	📄	Workslip
☐	📄	Workslip Sub
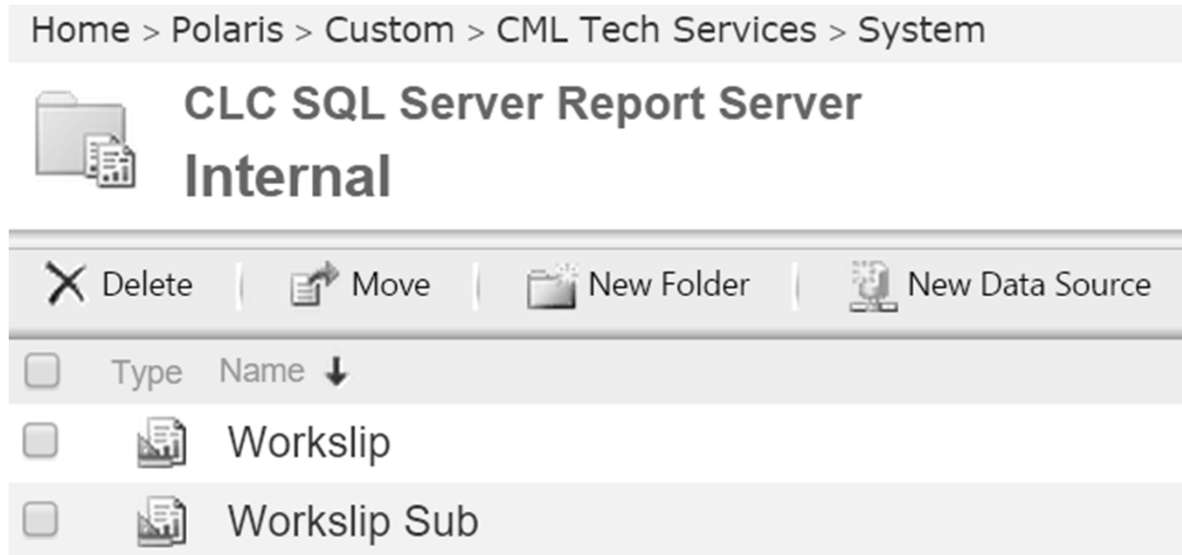
Customizing Notices

Use <u>same name</u> as built-in notice and place in:

Custom -> All -> Notices -> Email (or Fines, Holds, etc.)

Home > Polaris > Custom > All > Notices

CLC SQL Server Report Server
Email

	Type	Name ↓	D
☐		Email_AlmostOverdue	
☐		Email_AlmostOverdueOtherItems	
☐		Email_AutoRenewals	
☐		Email_ReminderAlmostOverdue	
☐		Email_ReminderAlmostOverdue_OLD	

✕ Delete | Move | New Folder | New Data Source | Report Builder
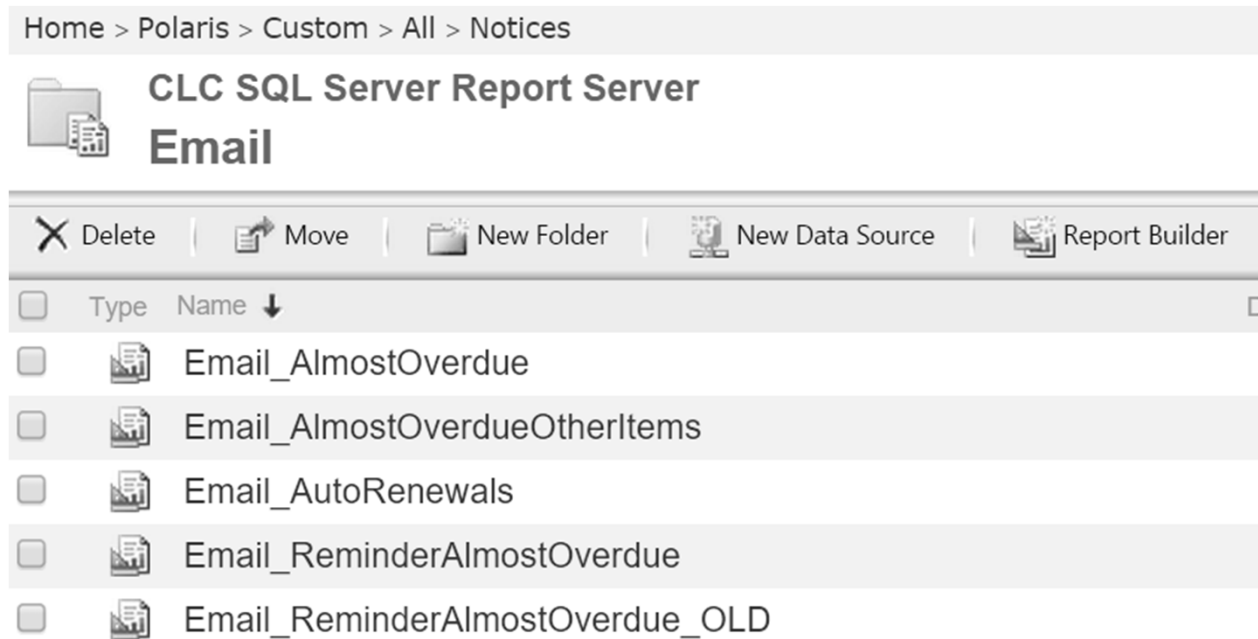
Review

Common configuration issues with SSRS

Use SSRS Web UI to subscribe to reports

Use Report Builder to manipulate and create new reports

Use "secret" folder locations to customize behind the scenes reports

More Information

This Presentation

    http://tinyurl.com/iug2015

Wes' PUG 2011 Report Presentation

    http://bit.ly/1I5eaEv

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