

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?

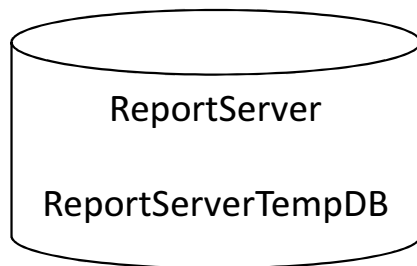
How do I configure it?

SSRS Components

A Database

Configuration Settings

Report “files” (XML)



Web Services

API Service



User Interface



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



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

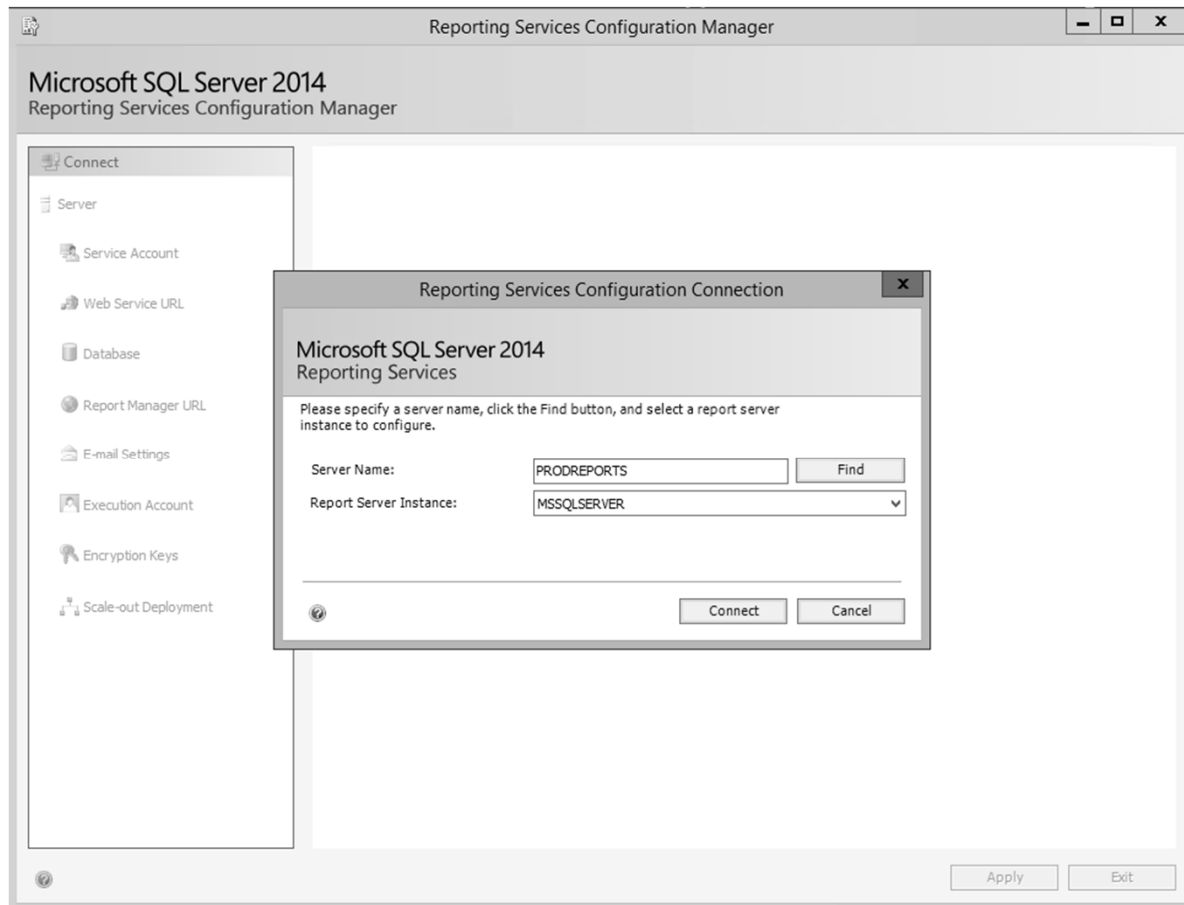
Service Account

URL settings

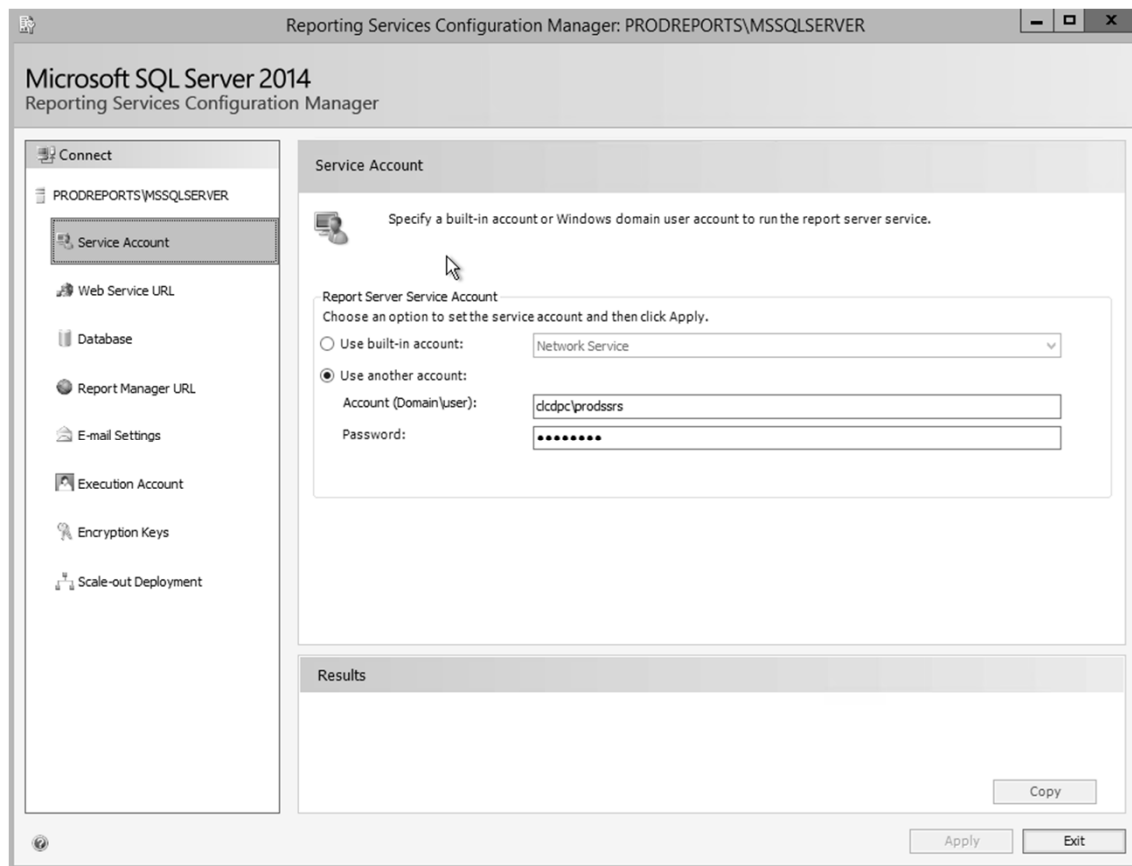
Email settings

SSRS GUI Tool

Reporting Services Configuration Manager



SSRS GUI Tool Service Account



Use Domain Account

Add Kerberos HTTP bindings to account name

Example:

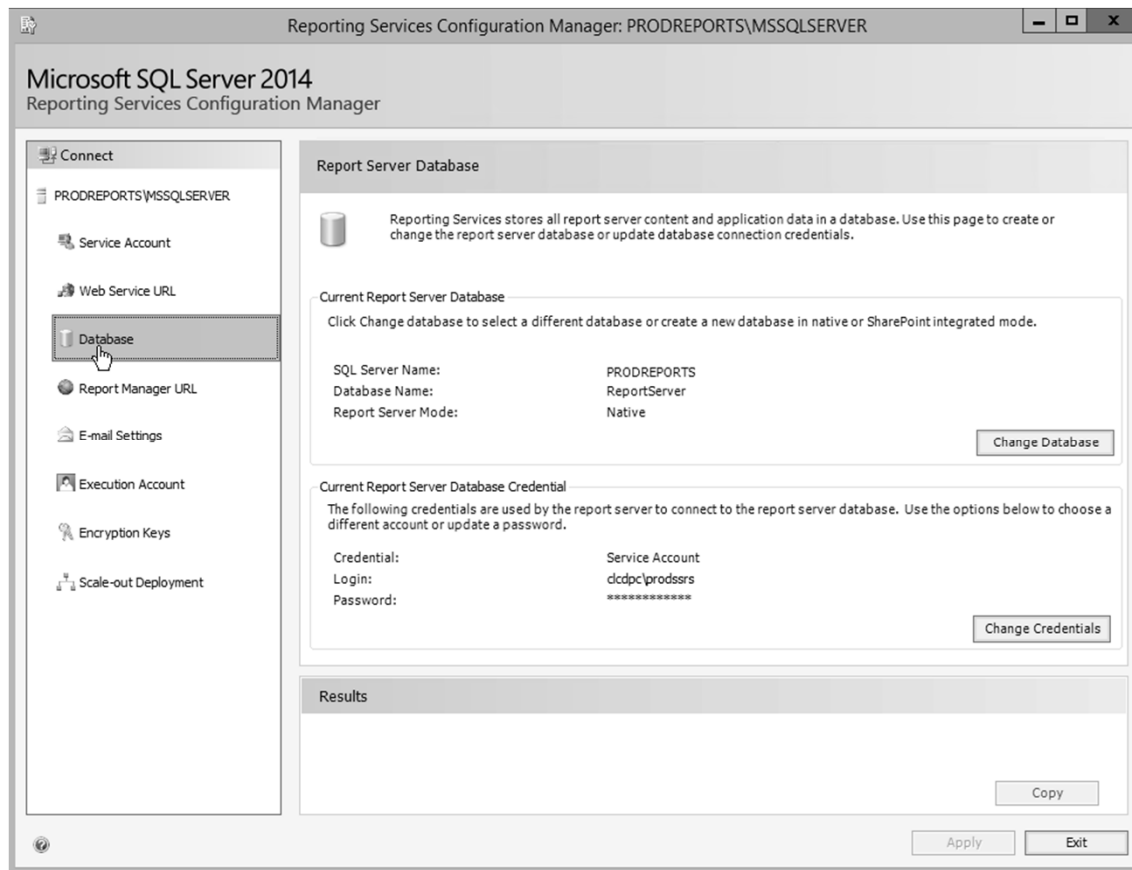
```
setspn -s  
HTTP/reports.clcoho.org  
clcdpc\prodssrs
```

Account needs trusted for Kerberos Delegation

Trusting SSRS Account for Delegation



SSRS GUI Tool Database

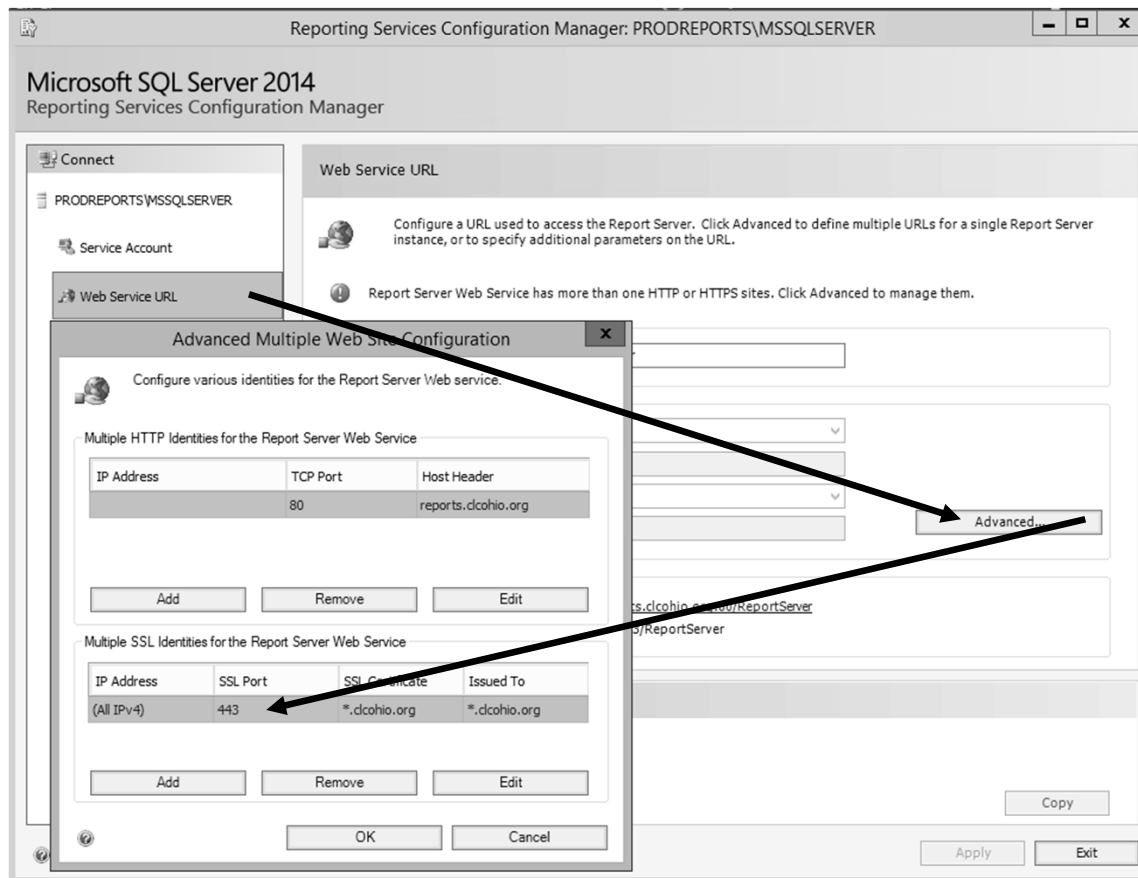


If moving SSRS
database, please see:
<http://bit.ly/1bHuX6f>

SSRS GUI Tool Web Service

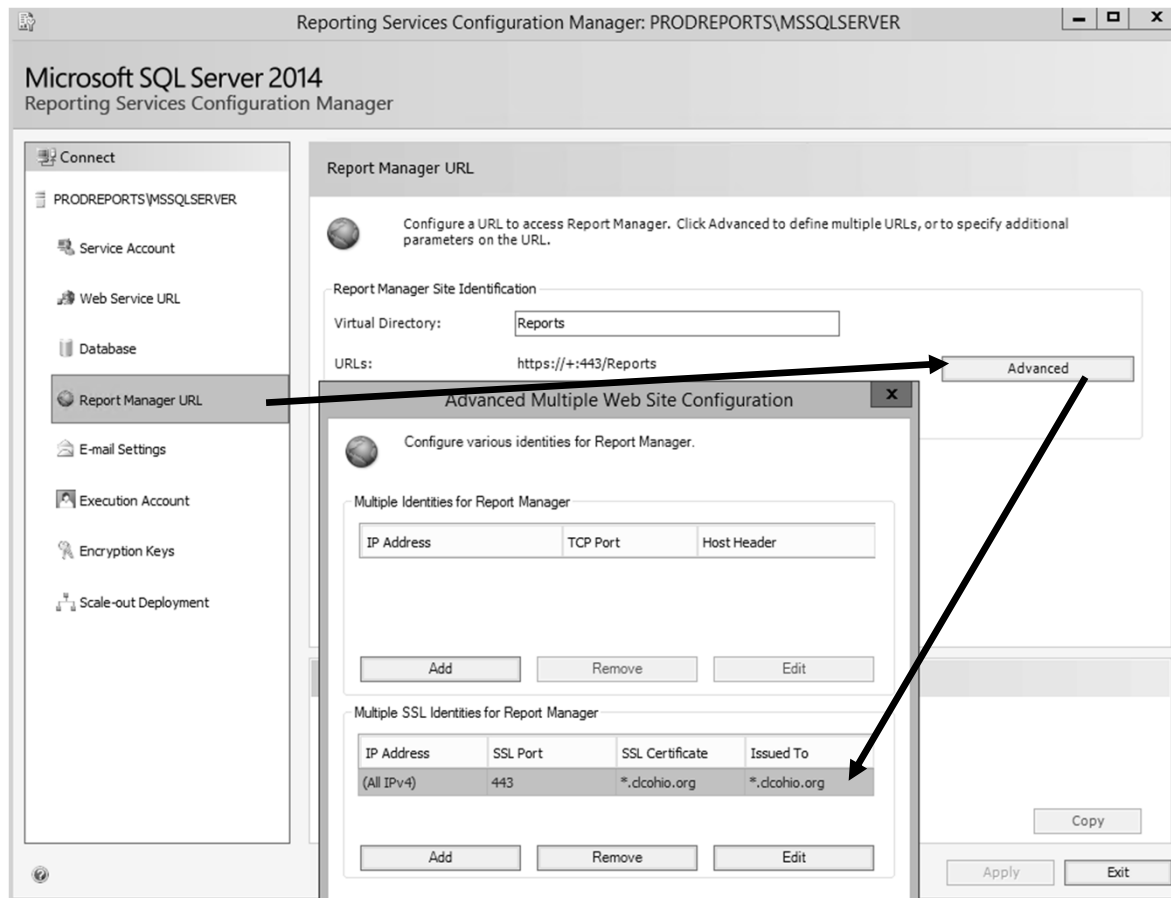
Don't bind IP to HTTP
port 80 service

Bind to port 443 and
assign appropriate
certificate



SSRS GUI Tool

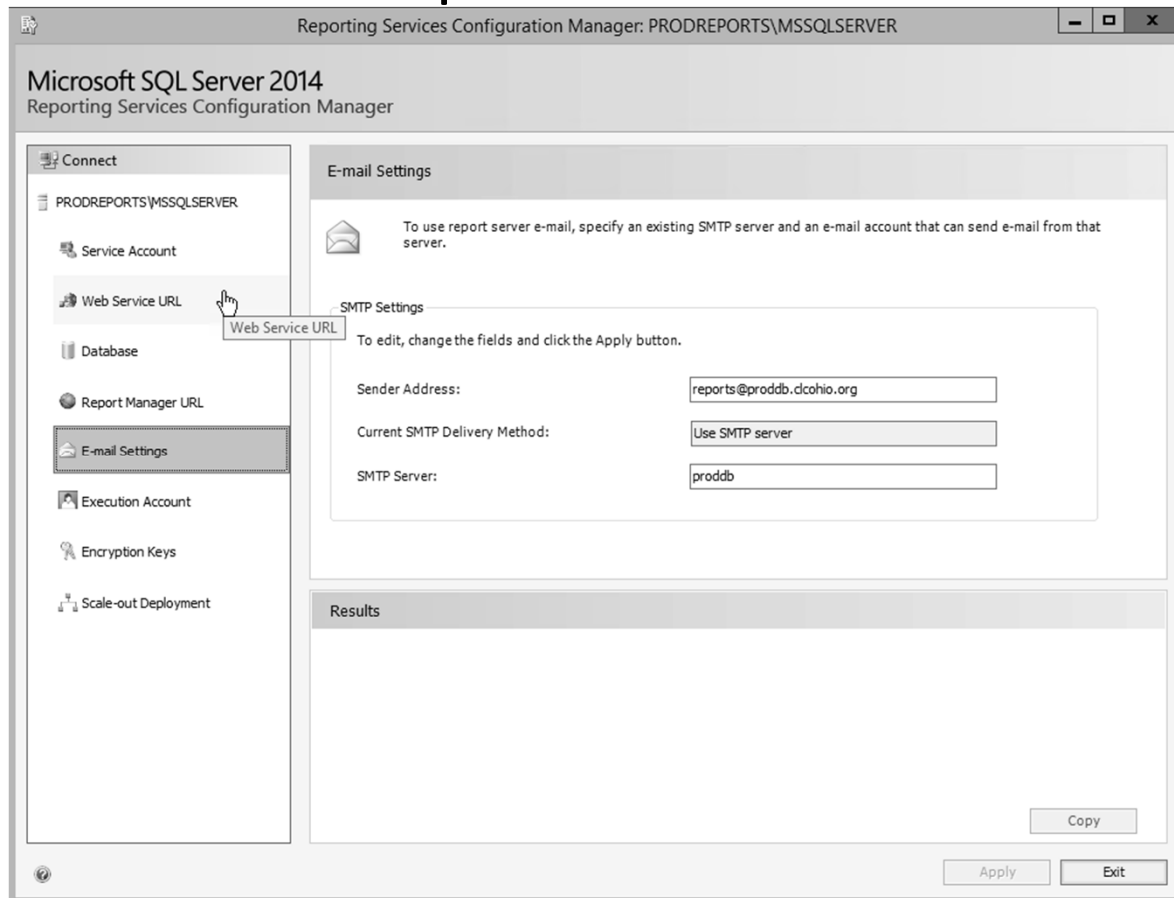
Web UI



Don't bind IP to HTTP port 80 service

Bind to port 443 and assign appropriate certificate

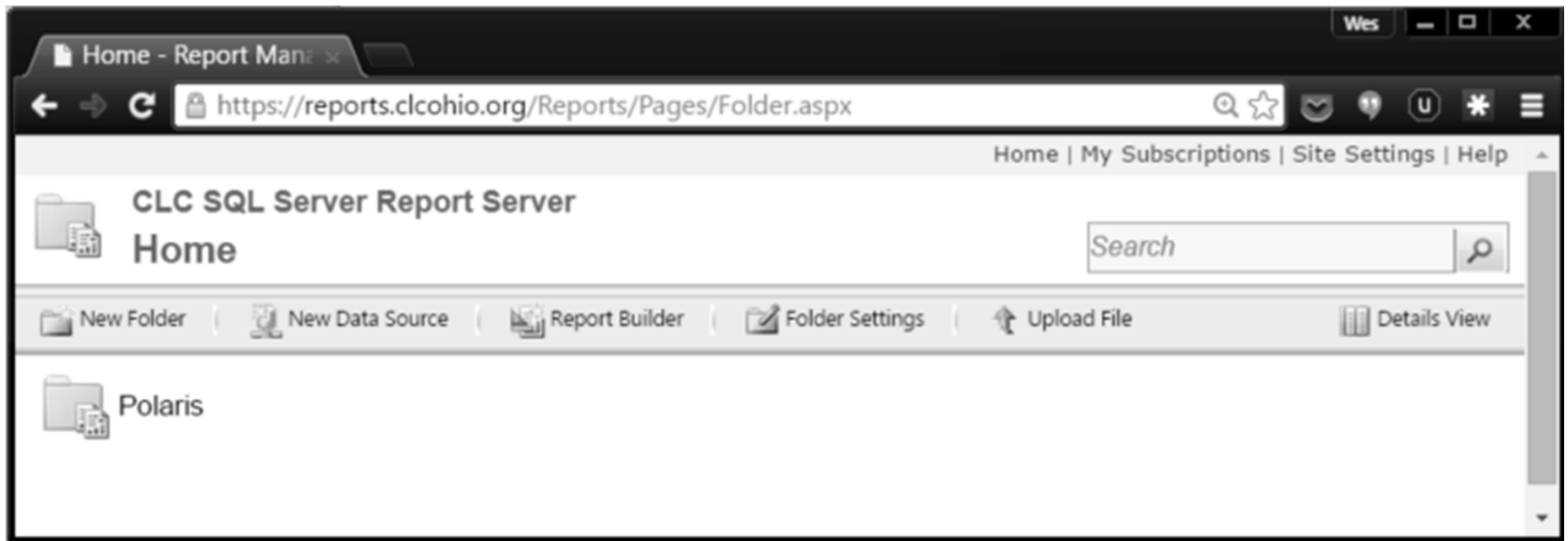
SSRS GUI Tool Email Setup



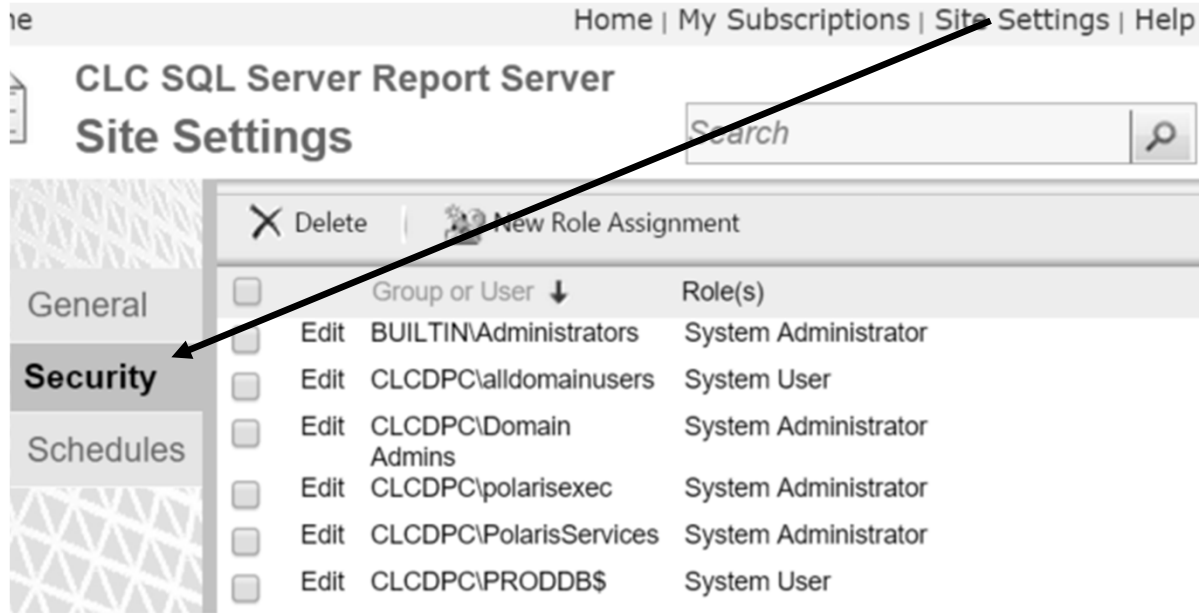
Must setup for report subscriptions via email

If using authenticated 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

Home | My Subscriptions | Site Settings | Help

CLC SQL Server Report Server
Site Settings

Search

Delete | Pause | Resume | New Schedule

<input type="checkbox"/>	Name	Schedule	Creator	Last Run	Next Run	Status
<input type="checkbox"/>	First day of the month at 2am	At 2:00 AM on day(s) 1 of every month, starting 5/16/2011	CLCDPC\Administrator	3/1/2015 2:00 AM	4/1/2015 2:00 AM	
<input type="checkbox"/>	Weekly Monday at 7am	At 7:00 AM every Mon of every week, starting 10/24/2011	CLCDPC\Administrator	3/16/2015 7:00 AM	3/23/2015 7:00 AM	
<input type="checkbox"/>	Daily At 8am	At 8:00 AM every day, starting 5/16/2011	CLCDPC\Administrator	3/19/2015 8:00 AM	3/20/2015 8:00 AM	
<input type="checkbox"/>	Test Schedule	At 9:00 AM on 6/2/2011	CLCDPC\Administrator	6/2/2011 9:00 AM	Never	Expired

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>

 <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

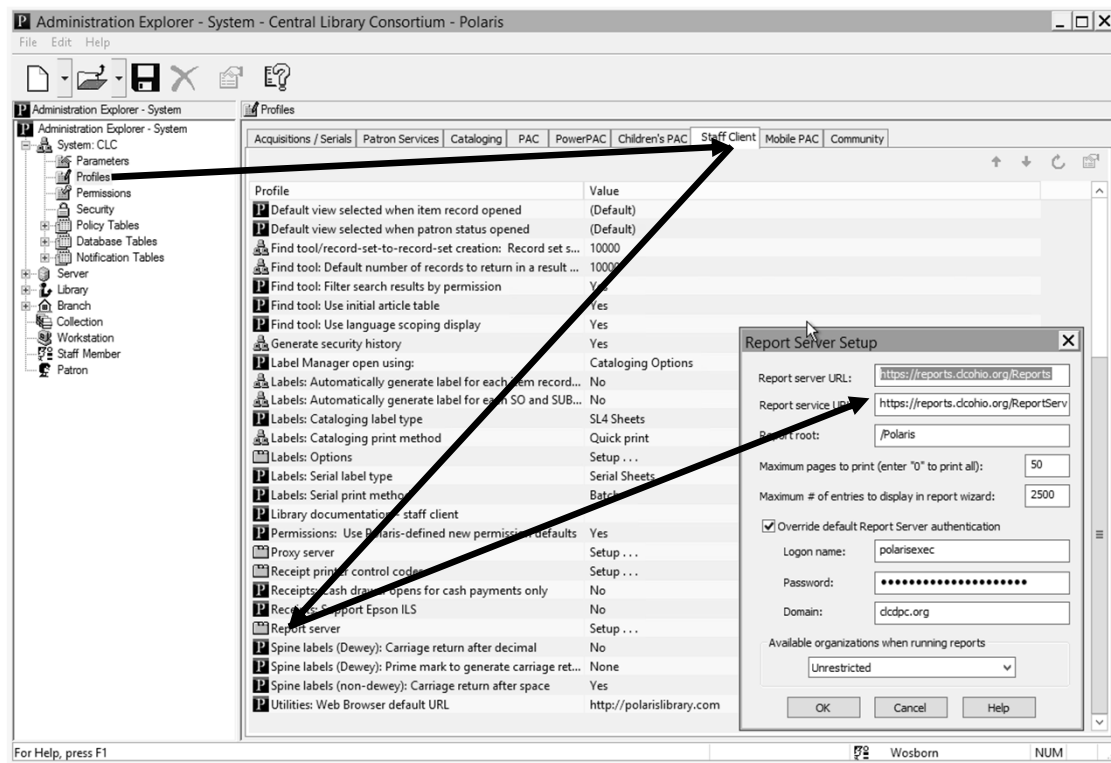
SSRS configuration in Sys Admin

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

The screenshot shows the configuration interface for SimplyReports. At the top, there are tabs for 'Patrons' and 'Patron Ac', and a sub-menu for 'Security' and 'Applicati'. The main area contains a list of configuration options, each with a corresponding input field or checkbox. The 'Reporting services settings' section is highlighted with a black arrow pointing to the 'Reporting service URL' field, which contains the text 'https://reports.dcoho.org/reportserver'. Other fields in this section include 'Root folder for RDL' (set to '/Polaris'), 'Reporting Services publishing account' (set to 'polarisexec'), 'Reporting Services publishing account password' (empty), 'Reporting Services publishing account domain' (set to 'dcoho'), and 'Report Builder application reference' (set to '/ReportBuilder/ReportBuilder_3_0_0_0.application').

Maximum simultaneous users	9999
Allow statistical report overrides	<input checked="" type="checkbox"/>
Allow users to share reports	<input checked="" type="checkbox"/>
Start with filter expansion areas open	<input type="checkbox"/>
Base directory of web service repository	C:\ProgramData\Polaris\SRServiceRoot
SimplyReports web service URL	https://simplyreports.dcoho.org/SRWebService/SRSQLService.asmx
SimplyReports MARC web service URL	https://simplyreports.dcoho.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.dcoho.org/reportserver
Root folder for RDL	/Polaris
Reporting Services publishing account	polarisexec
* Reporting Services publishing account password	
Reporting Services publishing account domain	dcoho
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

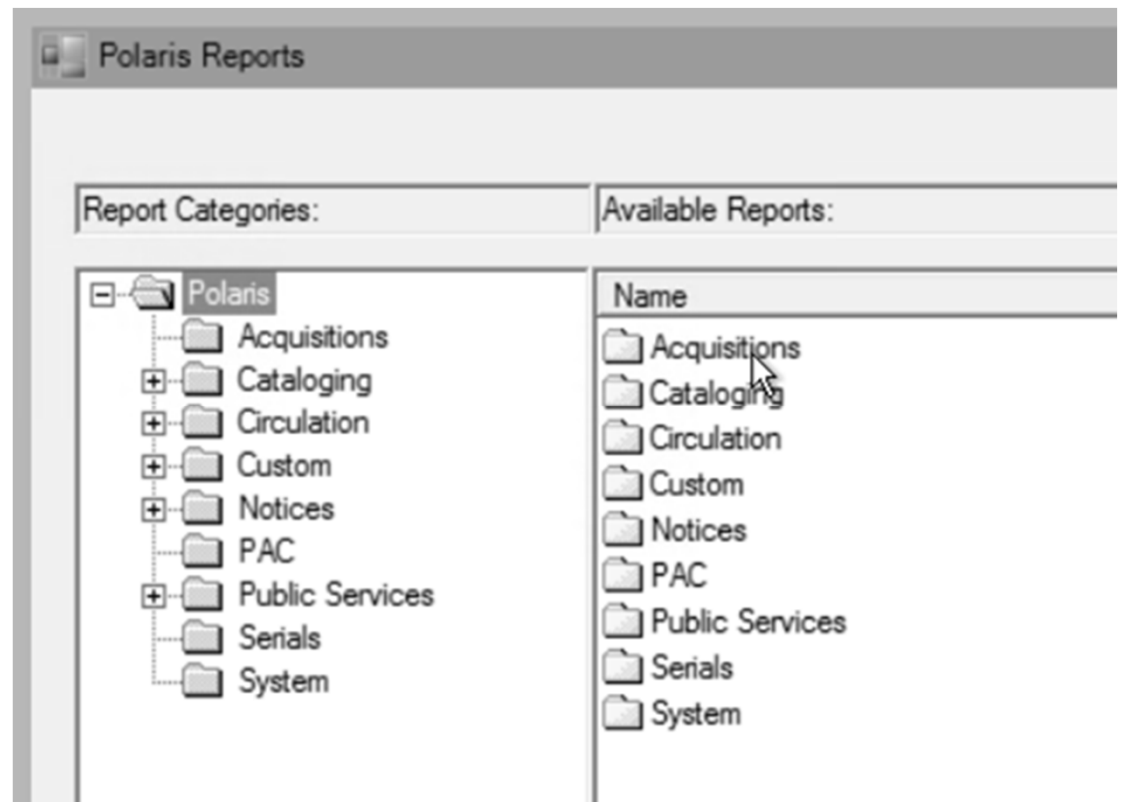
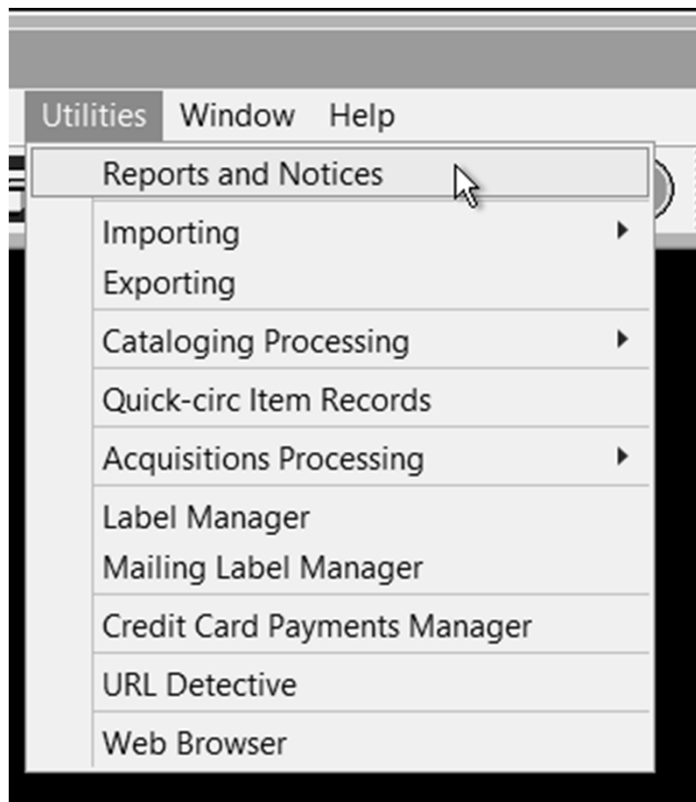
- Searching

- Output formats

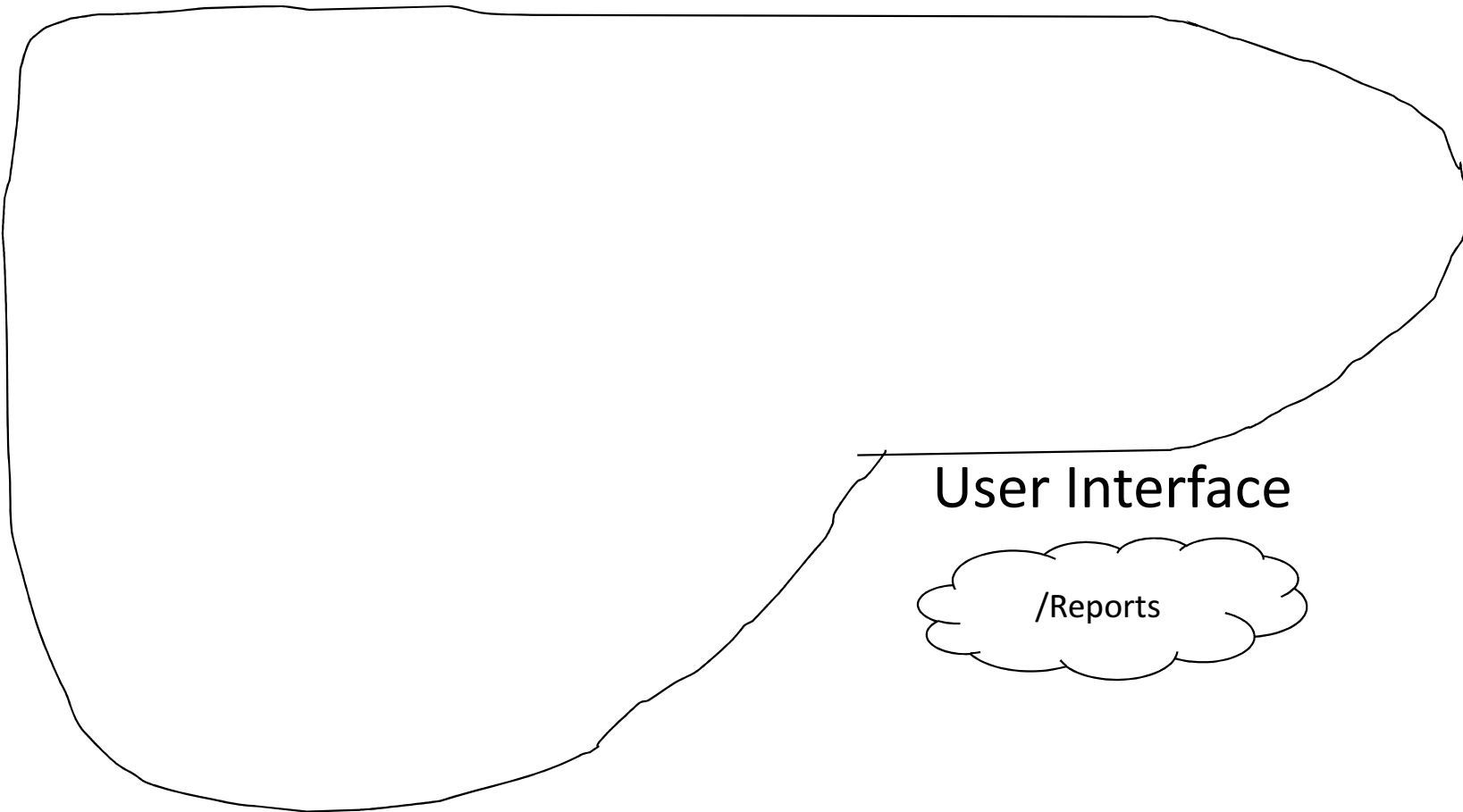
Creating report subscriptions

Data-driven report subscriptions

The Polaris Toolbar Reports



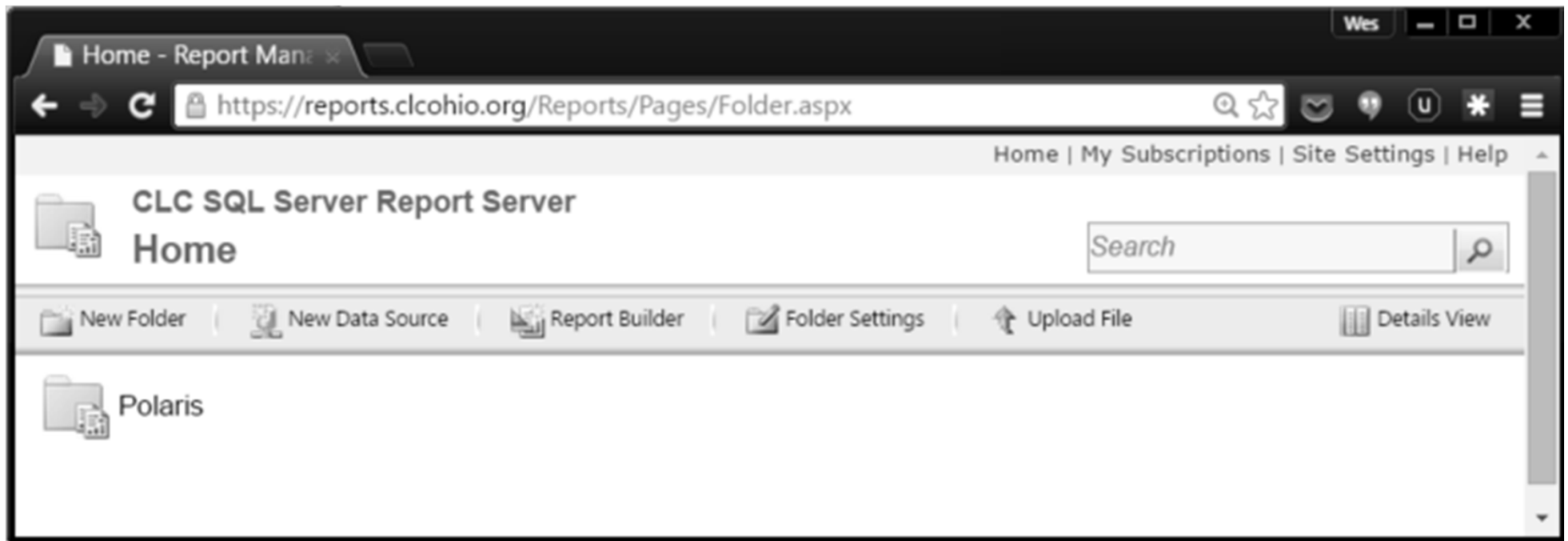
SSRS Web User Interface



User Interface

/Reports

SSRS Web UI – The Opening Page



Finding Reports using SSRS Web UI

SSRS Web UI – The Polaris Folder

Home | My Subscriptions | Site Settings | Help

CLC SQL Server Report Server
Polaris

Search

New Folder | New Data Source | Report Builder | Folder Settings | Upload File | Details View

Acquisitions | Cataloging

Circulation | Custom

Notices | PAC

Public Services | Serials

System | Polaris

Polaris Reports











Report Categories:	Available Reports:										
<ul style="list-style-type: none">Polaris<ul style="list-style-type: none">AcquisitionsCatalogingCirculationCustomNoticesPACPublic ServicesSerialsSystem	<table border="1"><thead><tr><th>Name</th></tr></thead><tbody><tr><td>Acquisitions</td></tr><tr><td>Cataloging</td></tr><tr><td>Circulation</td></tr><tr><td>Custom</td></tr><tr><td>Notices</td></tr><tr><td>PAC</td></tr><tr><td>Public Services</td></tr><tr><td>Serials</td></tr><tr><td>System</td></tr></tbody></table>	Name	Acquisitions	Cataloging	Circulation	Custom	Notices	PAC	Public Services	Serials	System
Name											
Acquisitions											
Cataloging											
Circulation											
Custom											
Notices											
PAC											
Public Services											
Serials											
System											

SSRS Web UI – Drilling Down

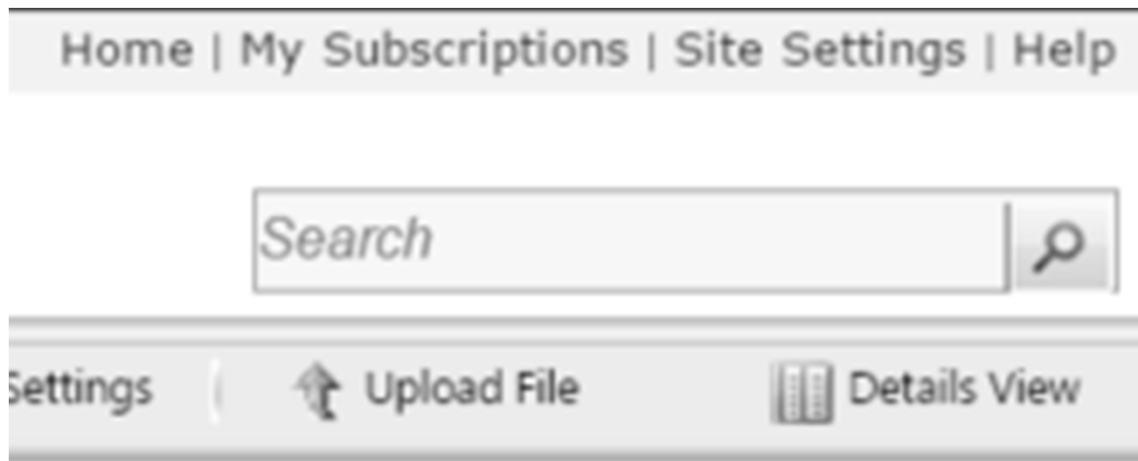
Home > Polaris > Custom Home | My Subscriptions | Site Settings | Help

CLC SQL Server Report Server
~Profile Reference Tables

New Folder | New Data Source | Report Builder | Folder Settings | Upload File | Details View


 Auto-Login Disabled Workstations	 Enabled Staff Accounts
 Library Calendar Information	 Library Notice Information
 List of Permissions Group a User Name...	 List of User Names in Polaris Permissio...
 Loan and Hold Limit Reference	 Loan Period and Fine Rates for Organiz...
 Loan Period and Fine Rates for Patron ...	 Loan Periods for Patron Code


SSRS Web UI – Searching







SSRS Web UI – Searching Partial String Matches

Home | My Subscriptions | Site :


 **CLC SQL Server Report Server**
Search Results











 Circulation	 Borrow By Mail Circulation Summary
 Browse vs Holds Circulation	 circ by stat code

SSRS Web UI – Searching No Folder Names

Home | My Subscriptions | Site Settings | Help

 **CLC SQL Server Report Server**
Search Results

collection   Details View

 Collection Agency	 Collection Inventory
 Collection Inventory	 Collection Inventory
 Circulation by Collection Material Type ...	 Circulation by Collection Material Type ...

Running Reports in SSRS

SSRS Web UI – Running Reports

Home > Polaris > Custom > ~Patron Services > Item Circulation By Collection Group

Locations

Begin Date

End Date

- (Select All)
- Alexandria Public Library
- CLC Electronic Library
- Grandview Heights Public l
- Fairfield County Main Libra
- Fairfield County Johns Brar
- Fairfield Countyv Baltimore f

◀ ▶

SSRS Web UI – Running Reports

Support for defaults

Home > Polaris > Custom > ~Patron Services > Item Circulation By Collection Group Home | My Subscriptions | Site Settings | Help

Locations
Begin Date
End Date

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

SSRS Web UI – Report Preview

Home > Polaris > Custom > ~Patron Services > Item Circulation By Collection Group Home | My Subscriptions | Site Settings | He

Locations:
Begin Date:
End Date:

1 of 1

Item Circulation By Collection Group

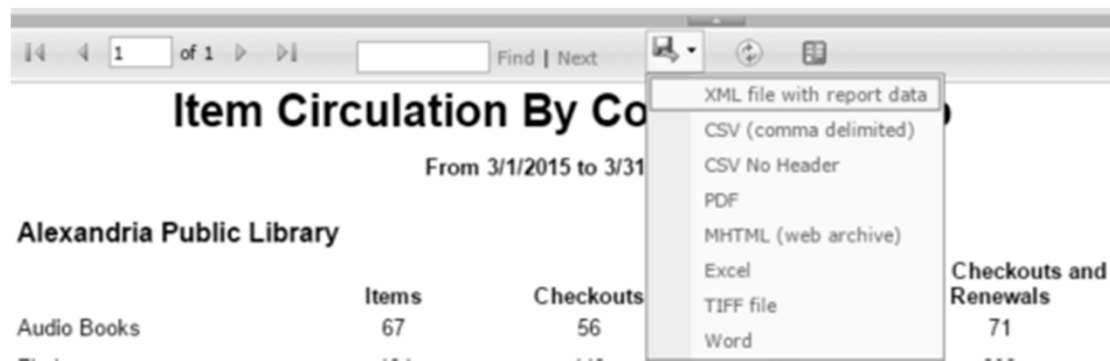
From 3/1/2015 to 3/31/2015

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

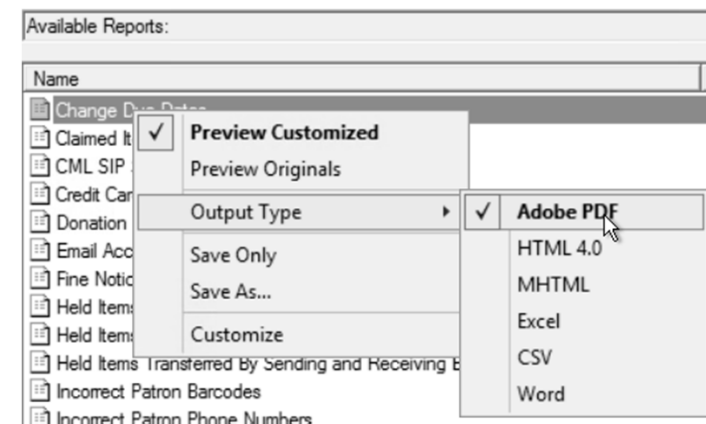
SSRS Web UI – Downloading the Report

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

Home > Polaris > Custom > ~Patron Services > Item Circulation By Collection Group Home | My Subscriptions | Site Settings | Help

Locations: Alexandria Public Library Begin Date: 3/1/2015 End Date: 3/31/2015 11:59:59 PM View Report

Home > Polaris > Custom > ~Patron Services

CLC SQL Server Report Server
Item Circulation By Collection Group

Subscriptions

Delete | New Subscription | New Data-driven Subscription

Check	Icon	Description	Trigger
<input type="checkbox"/>		Edit	Timed Subscription
<input type="checkbox"/>		New Subscription	Timed Subscription

SSRS Web UI – Subscribing

Fill in email, render format, schedule

Report Delivery Options

Specify options for report delivery.

Delivered by:

To:

Cc:

Bcc:

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

Reply-To:

Subject:

Include Report Render Format:

Include Link

Priority:

Comment:

Subscription Processing Options

Specify options for subscription processing.

Run the subscription:

- When the scheduled report run is complete.
At 8:00 AM every Mon of every week, starting 4/10/2015
- On a shared schedule:
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

Home Home | **My Subscriptions** | Site Settings | Help

 **CLC SQL Server Report Server**
My Subscriptions



Delete

<input type="checkbox"/>		Report ↓	Description	Folder	Trigger	Last Run	Status
<input type="checkbox"/>		Edit	Statistical Summary - Last Month Send e-mail to wosborn@clcoho.org	/Polaris/Custom/Scheduled Reports	Timed Subscription	4/1/2015 2:00 AM	Mail sent to wosborn@clcoho.org
<input type="checkbox"/>		Edit	Statistical Summary - Last Month Send e-mail to dshedloski@alexandria.lib.oh.us	/Polaris/Custom/Scheduled Reports	Timed Subscription	4/1/2015 2:00 AM	Mail sent to dshedloski@alexandria.lib.oh.us
<input type="checkbox"/>		Edit	Statistical Summary - Last Month Send e-mail to msteiner@fcdlibrary.org	/Polaris/Custom/Scheduled Reports	Timed Subscription	4/1/2015 2:00 AM	Mail sent to msteiner@fcdlibrary.org

Avoid scheduling all SSRS reports as Admin

If an account is disabled their scheduled reports stop running

There is no easy way to re-assign scheduled reports

Have users schedule their own reports or create a service account (SSRS_ScheduledReports_DONOTDELETEorDISABLE)

Data-driven subscriptions

Data-driven Subscriptions

Allow you to use database elements for report parameters

OR

Use database elements for subscription parameters

SQL Enterprise is required

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

The screenshot shows a web application interface for 'Item Status'. The breadcrumb navigation at the top reads 'Home > Polaris > Cataloging > Item > Item Status'. On the right side of the top navigation bar, there are links for 'Home | My Subscriptions | Site Settings | Help'. Below the breadcrumb, the 'Organization:' dropdown menu is open, showing a list of library organizations. The selected organization is 'Alexandria Public Library (ALEM)'. The dropdown menu includes the following options:

- (Select All)
- <All>
- Alexandria Public Library (ALEM)
- Bexley Public Library (BPL)
- CLC Electronic Library (CLCel)
- CML Columbus Main Library (CML)
- CML Driving Park Branch (C-D)
- CML Dublin Branch (C-DUB)

To the right of the dropdown menu is a 'View Report' button. Below the dropdown menu, there is a search bar with 'Find | Next' and several icons. The main content area displays the title 'Item Status' in a large, bold font. At the bottom left, the text 'Alexandria Public Library' is partially visible.

Data-driven Subscriptions

Finding the Manger's: Email Address & Branch

Staff Member - 132 - Wosborn - Polaris

File Edit View Tools Help

Name: Wosborn

Email Address: wosborn@clcoho.org

Organization: Fairfield County Main Library

Affiliated Branch:

Domain: (None)

Account

Active

Suspend

Data-driven Subscriptions Manager's Info via SQL

SQLQuery1.sql - pr...DPC\wosborn (635))* X

```
select * from polaris.polaris.polarisusers where polarisuserid = 132
```

100 % <

Results Messages

	PolarisUser...	OrganizationID	Name	Branch...	Enabl...	Creator...	Modifier...	CreationDate
1	132	9	Wosborn	NULL	1	1	132	2009-07-13 10:25:25.507

SQLQuery1.sql - pr...DPC\wosborn (635))* X

```
select * from polaris.polaris.userspppp where polarisuserid = 132
```

100 % <

Results Messages

	PolarisUser...	AttrID	Value
1	132	658	wosborn@clcoho.org
2	132	659	
3	132	1285	Yes

Data-driven Subscriptions

Combining email & branch ID

SQLQuery1.sql - pr...DPC\wosborn (635))*

```
select p.value as [Email], pu.organizationid as [BranchID]
from polaris.polaris.userspppp p
join polaris.polaris.polarisusers pu on pu.polarisuserid = p.polarisuserid
where p.attrid = 658 and p.polarisuserid in (132)
```



100 %



Results Messages

	Email	BranchID
1	wosborn@clcoho.org	9

Setting up the Data-Driven Subscription

Home > Polaris > Cataloging > Item Home | My Subscriptions | Site Settings | Help

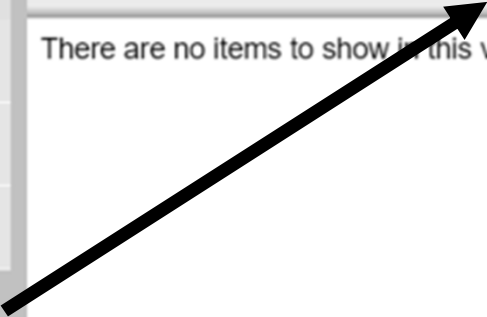
 **CLC SQL Server Report Server**
Item Status Search 

 New Subscription |  New Data-driven Subscription

There are no items to show in this view. Click Help for more information about this page.

Subscriptions

- Properties
- Parameters
- Data Sources
- Subscriptions**
- Processing Options
- Cache Refresh Options



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

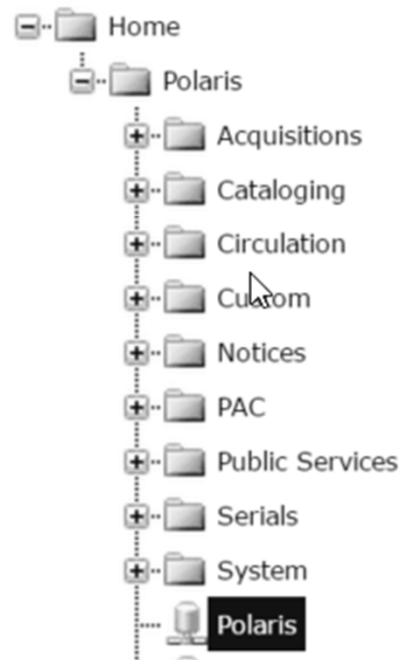
Data-Driven Subscriptions

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:



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.userspppp 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: seconds

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

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:

Cc

Specify a static value:

Get the value from the database:

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:

< 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 ▾
At 2:00 AM on day(s) 1 of every month, starting 5/16/2011

< Back

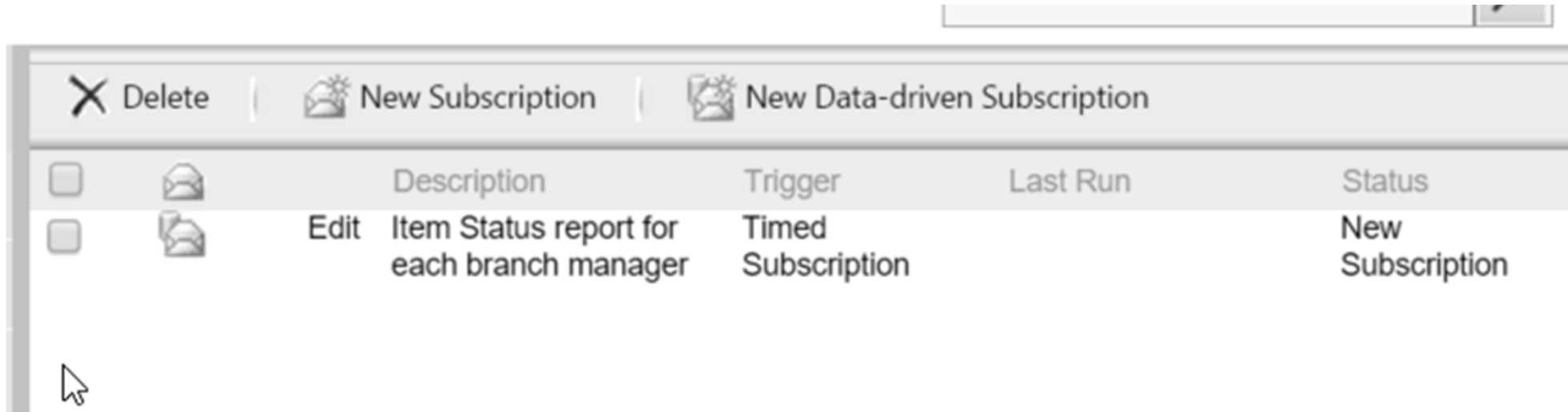
Next >

Cancel



Finish

Data-Driven Subscriptions

Selecting the Data Source



The screenshot shows a software interface with a menu bar and a table of subscriptions. The menu bar includes 'Delete', 'New Subscription', and 'New Data-driven Subscription'. The table has columns for 'Description', 'Trigger', 'Last Run', and 'Status'. A mouse cursor is visible at the bottom left.

		Description	Trigger	Last Run	Status
<input type="checkbox"/>					
<input type="checkbox"/>		Edit Item Status report for each branch manager	Timed Subscription		New Subscription

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 pictures.

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


Staff Member - 132 - Wosborn - Polaris

File Edit View Tools Help

Print (Ctrl+P)

Name: Print (Ctrl+P)

Email Address: wosborn@clcoho.org

Organization:  Marysville Public Library

Affiliated Branch:

Domain: (None)

Account

Active

Suspend

Member

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

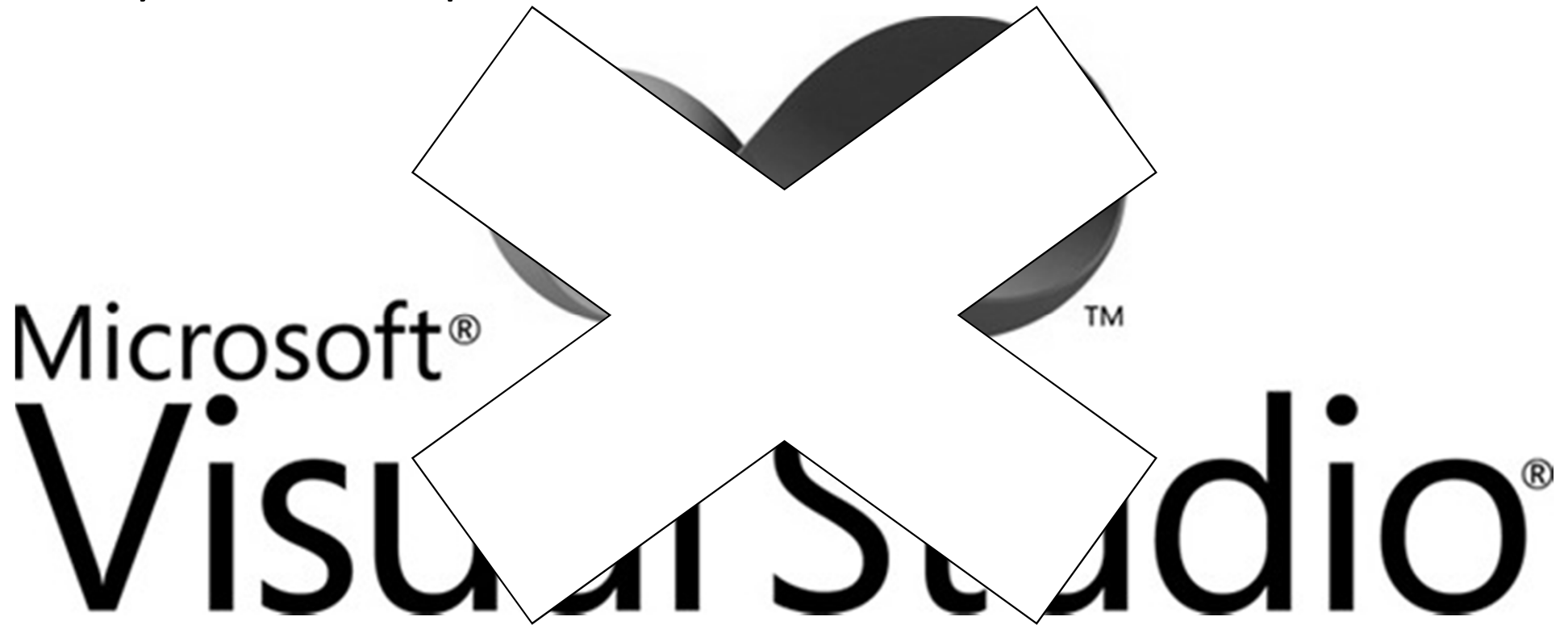


Select Language: ▼ [Download](#)

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



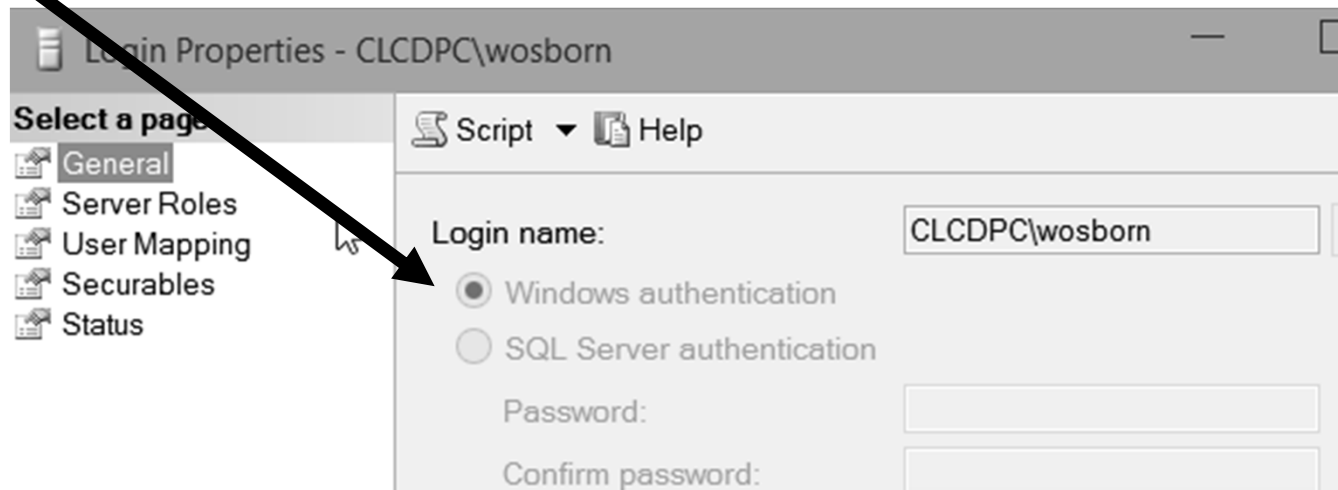
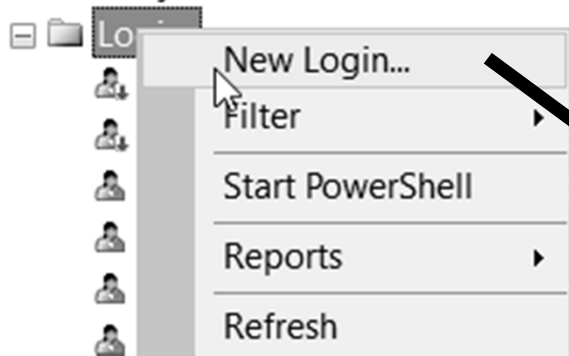
Create a personal DB user account

Use Windows authentication

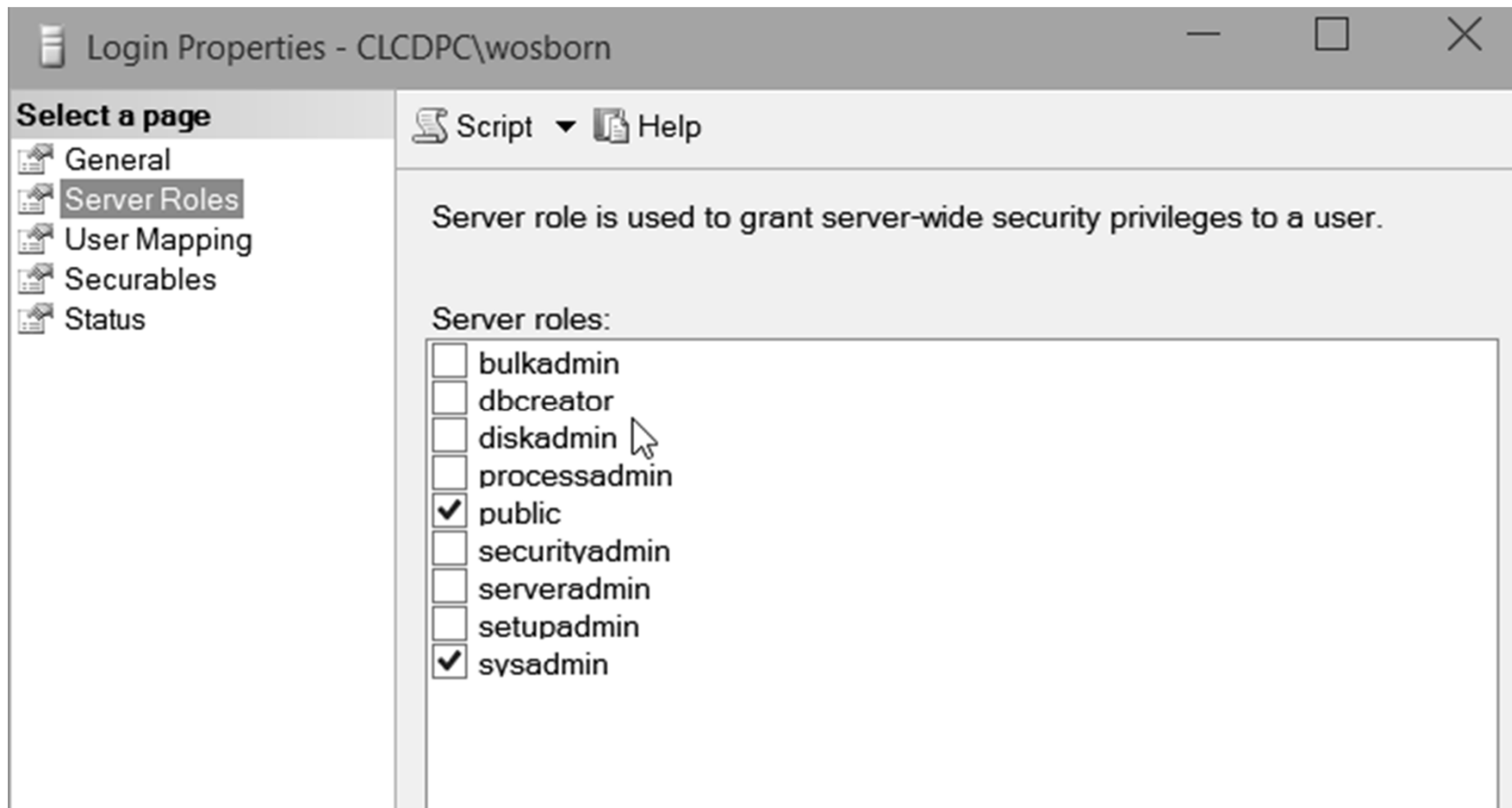
proddb (SQL Server 12.0.2402 - CLCD

+ Databases

- Security



Assign user account sysadmin 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

Home > Polaris > Cataloging > Item > In-Transit Items

Home | My Subscriptions | Site Settings | Help

Begin
Date

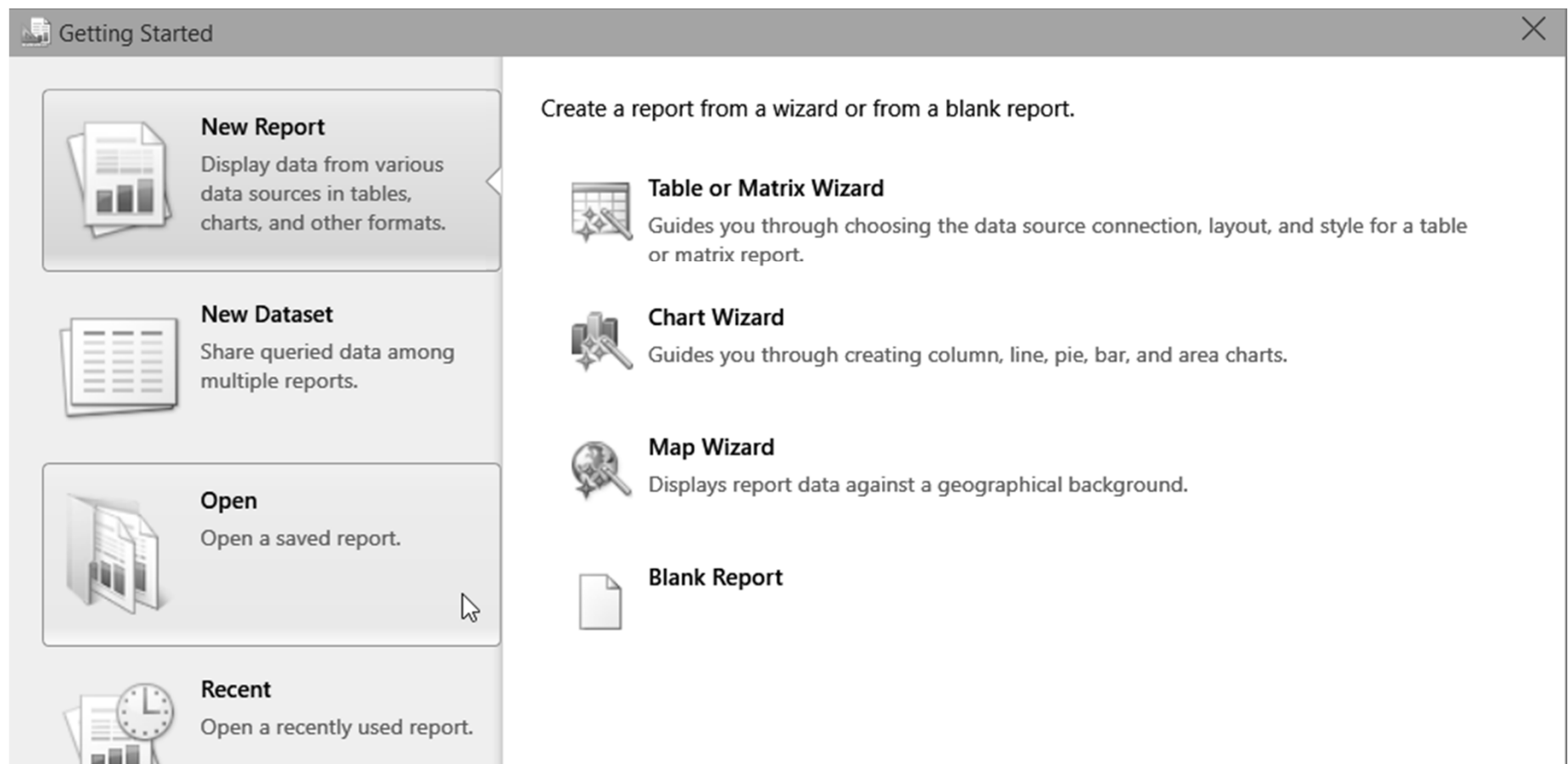


End
Date



View Report

Opening an existing report to customize



The screenshot shows a window titled "Getting Started" with a close button in the top right corner. The window is divided into two main sections. On the left is a vertical sidebar with five options, each with an icon and a description. On the right is the main content area with a heading and five wizard options, each with an icon and a description.

Getting Started [Close]

New Report
Display data from various data sources in tables, charts, and other formats.

New Dataset
Share queried data among multiple reports.

Open
Open a saved report.

Recent
Open a recently used report.

Create a report from a wizard or from a blank report.

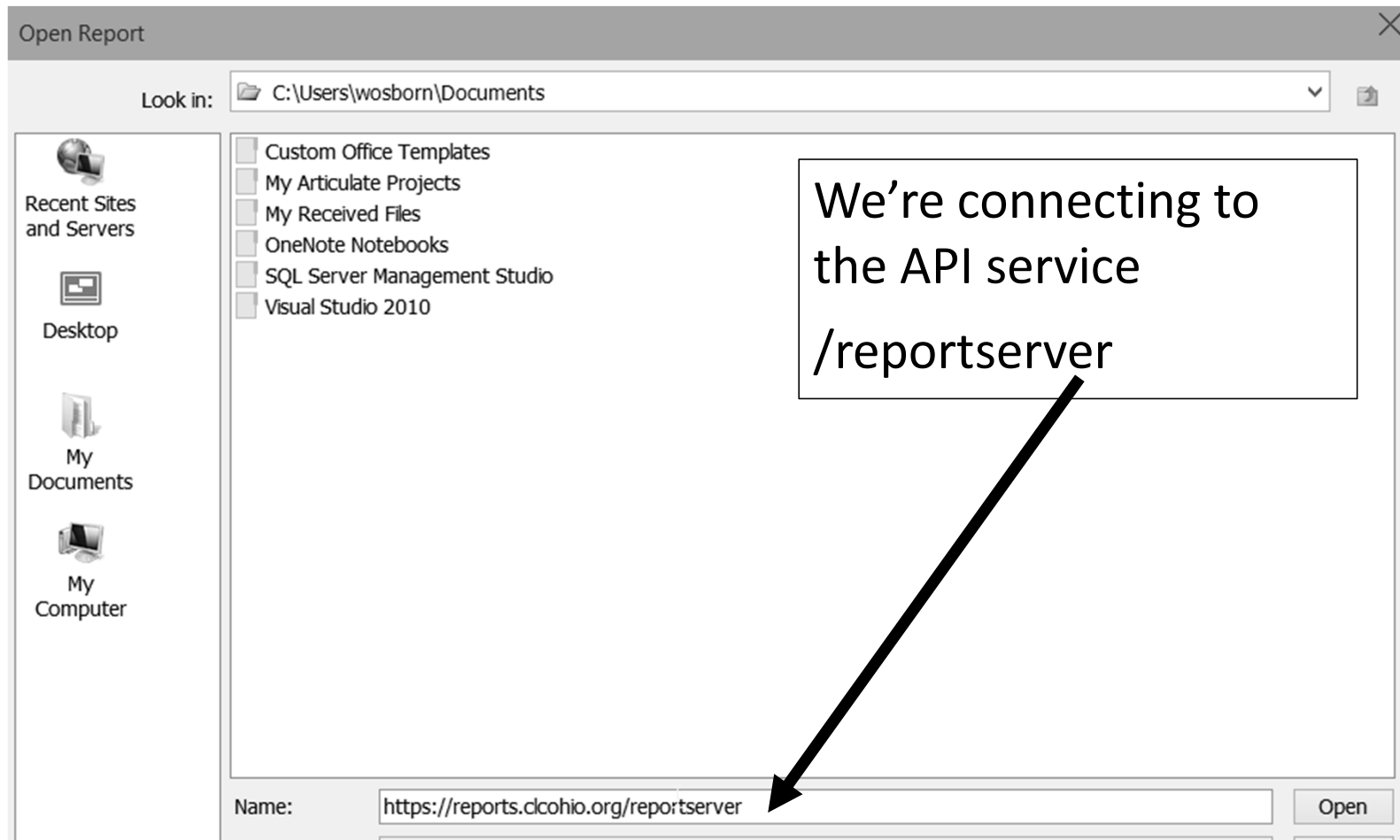
Table or Matrix Wizard
Guides you through choosing the data source connection, layout, and style for a table or matrix report.

Chart Wizard
Guides you through creating column, line, pie, bar, and area charts.

Map Wizard
Displays report data against a geographical background.

Blank Report

Connecting to your SSRS server



Find the report to customize and Open it

Open Report

Look in: <https://reports.clcoho.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

The screenshot displays the SSRS Design Mode interface. At the top, there are three tabs: Home, Insert, and View. Below these are several toolbars: Run, Paste, Font, Paragraph, Border, Number, Merge, Split, and Layout. On the left side, there is a 'Report Data' pane with a tree view showing the following structure:

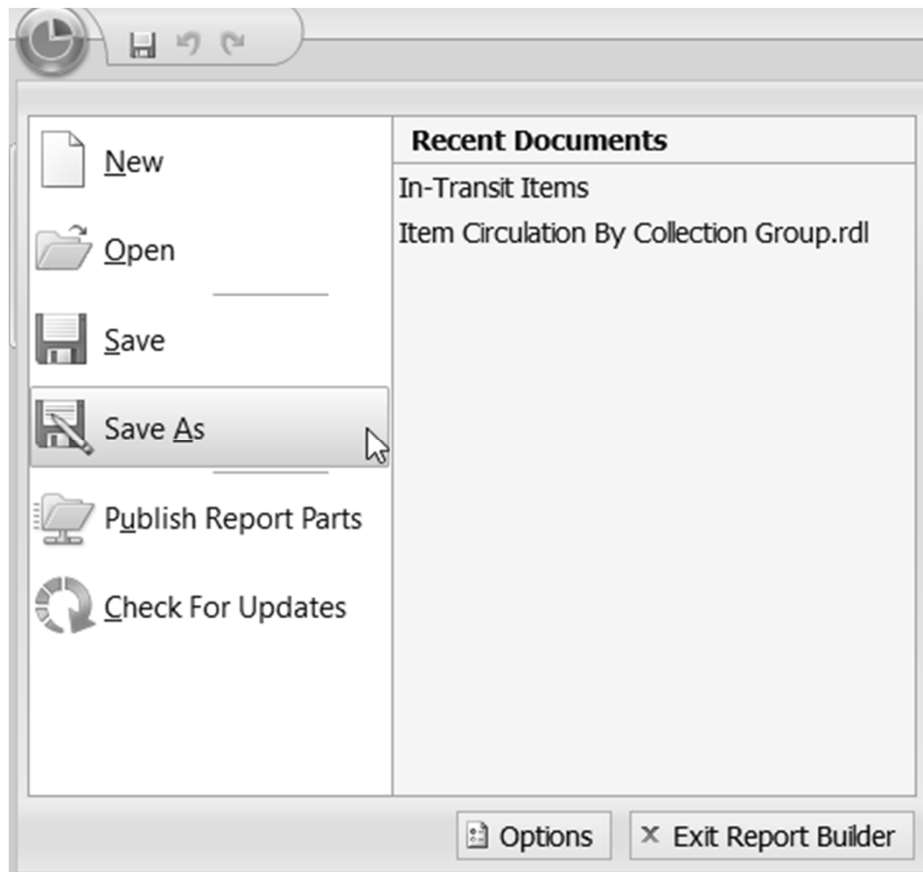
- Report Data
 - New - Edit... X
 - Built-in Fields
 - Parameters
 - dtBeginDate
 - dtEndDate
 - Images
 - Data Sources
 - Polaris
 - Datasets
 - dsInTransitItems
 - CallNumber
 - Barcode
 - BrowseAuthor
 - BrowseTitle
 - DestinationBranch
 - DateInTransit
 - ItemRecordID
 - LastUseBranch
 - cBranch

The main design area shows a report layout with a table. The table has a header row with the following columns: Date, Call Number, Title, Author, Item Barcode, and Destination. The data rows contain the following values:

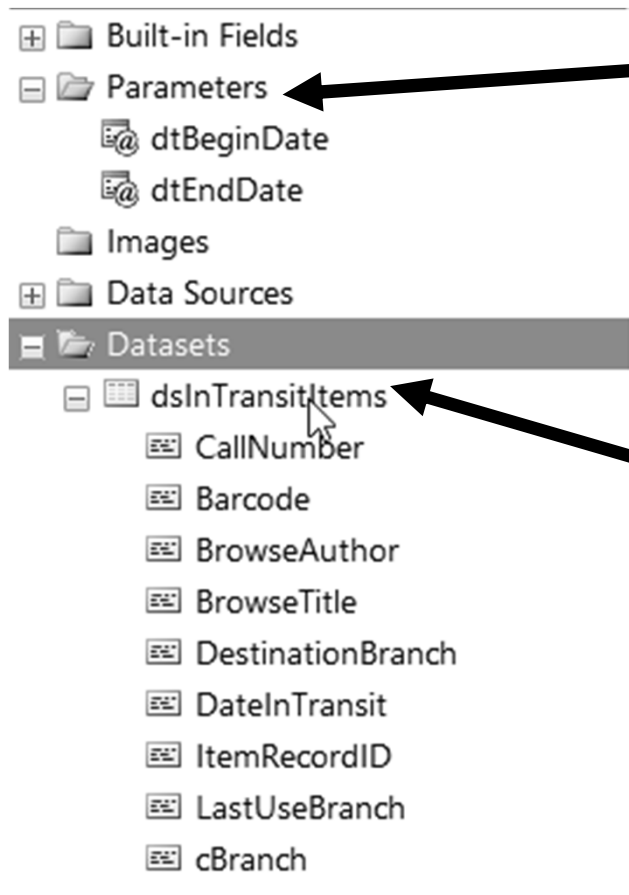
Date	Call Number	Title	Author	Item Barcode	Destination
[DateInTransi	[CallNumber]	[BrowseTitle]	[BrowseAuthor]	[Barcode]	[DestinationBranc

There are also several text boxes and expressions in the design area, including a large box at the top containing the expression `«&ReportName»` and several smaller boxes containing `«Expr»`.

Save the report to your custom folder



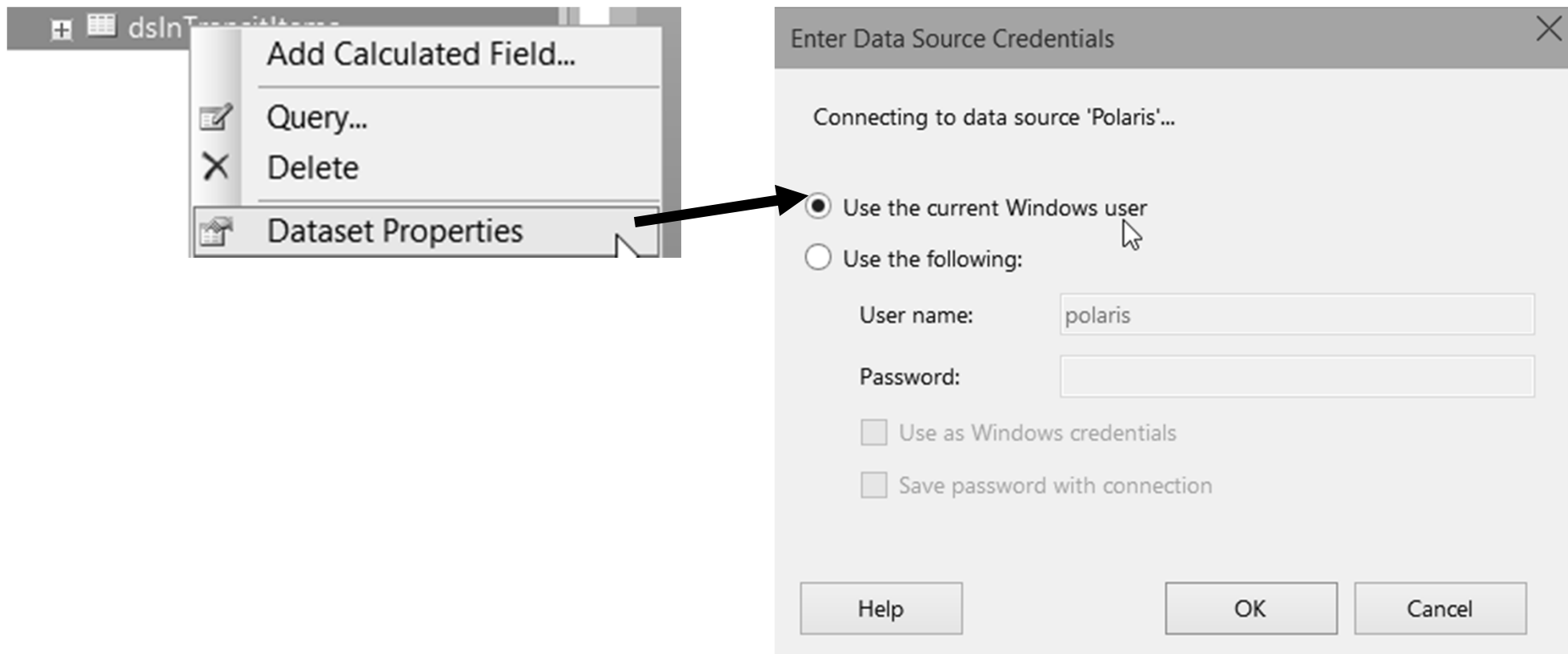
Adding a new parameter



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!

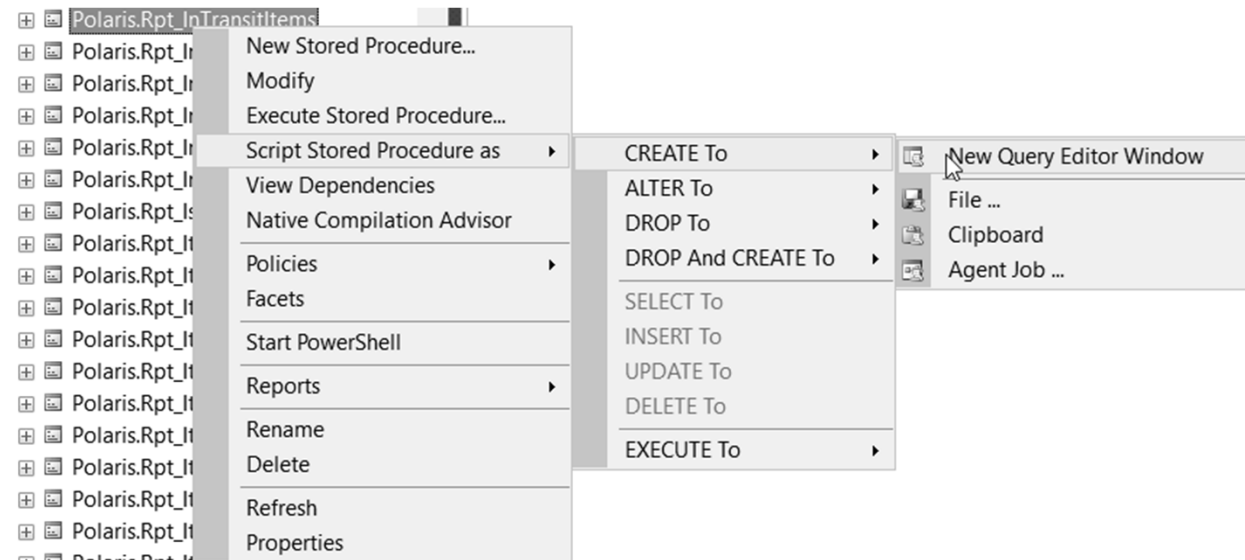
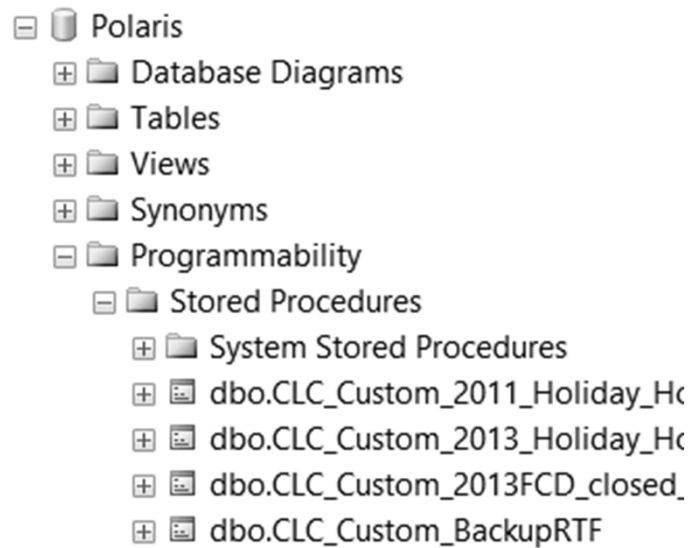


Most Polaris reports use Stored Procedures

The screenshot shows the 'Query' configuration window in Polaris. On the left is a sidebar with navigation options: 'Query' (selected), 'Fields', 'Options', 'Filters', and 'Parameters'. The main area contains the following settings:

- Instruction:** Choose a data source and create a query.
- Name:** A text box containing 'dsInTransitItems'.
- Dataset Selection:** Two radio buttons: 'Use a shared dataset.' (unselected) and 'Use a dataset embedded in my report.' (selected).
- Data source:** A dropdown menu showing 'Polaris' and a 'New...' button.
- Query type:** Three radio buttons: 'Text' (unselected), 'Table' (unselected), and 'Stored Procedure' (selected).
- Stored Procedure Name:** A dropdown menu showing 'Polaris.Rpt_InTransitItems' and a 'fx' button.

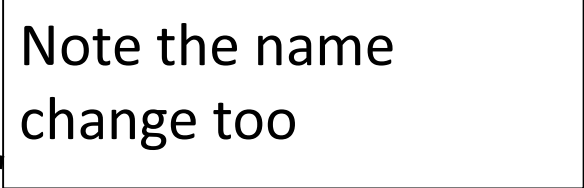
Copy the Polaris Stored Procedure



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
AS
    ON CIR.InTransitSentBranchID = SentOrgInTransit.OrganizationalID
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...

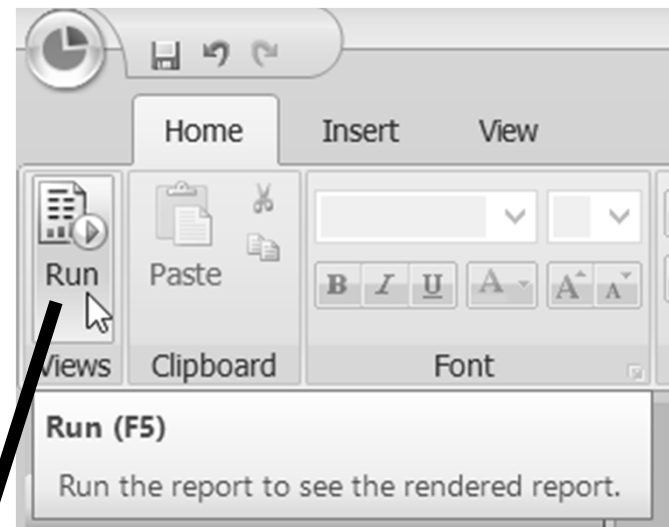
Refresh Fields

- . ..

Great! Now we're all done right?

Parameters

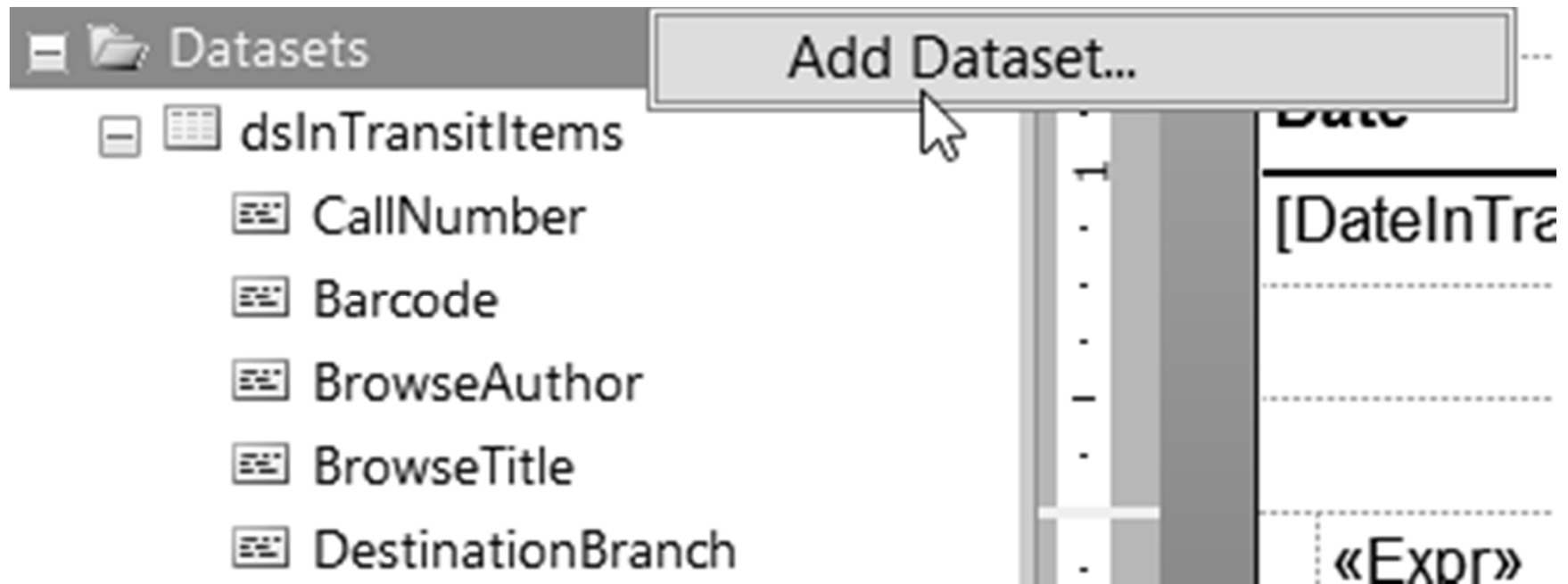
- dtBeginDate
- dtEndDate
- LastUseBranchID



Do staff know their branch ID?

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

Don't forget to sort the results using ORDER BY

Choose a data source and create a query.

Name:
BranchNameList

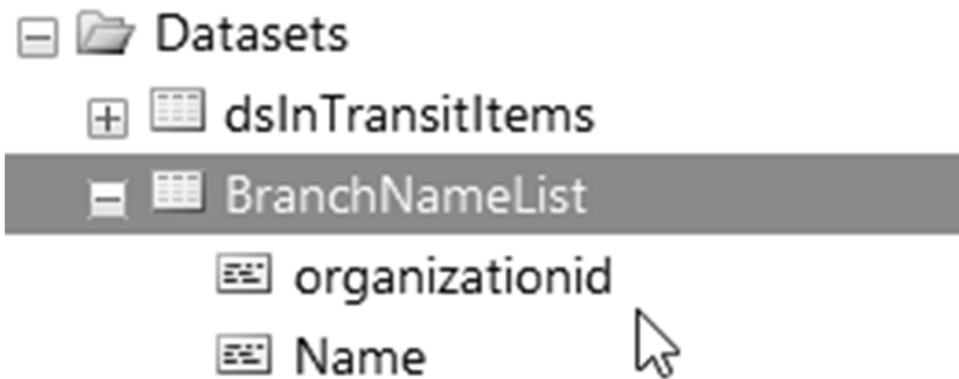
Use a shared dataset.
 Use a dataset embedded in my report.

Data source:
Polaris New...

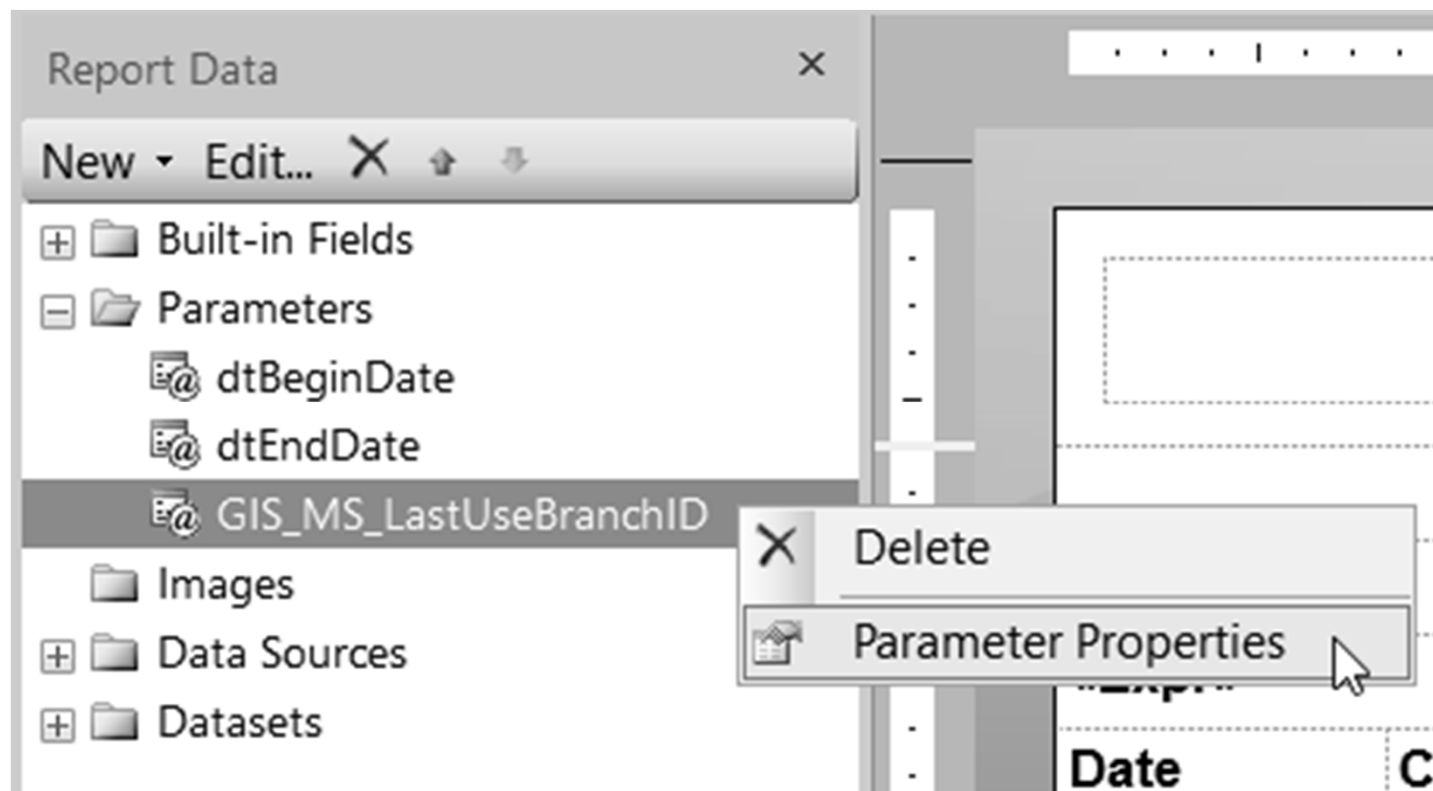
Query type:
 Text Table Stored Procedure

Query:
select organizationid, Name
from polaris.polaris.organizations
where organizationid = 3
order by Name

Results from dataset



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



Pointing the parameter to a dataset

Report Parameter Properties

General

Available Values

Default Values

Advanced

Choose the available values for this parameter.

Select from one of the following options:

- None
- Specify values
- Get values from a query

Dataset: (Warning: Possible performance impact)

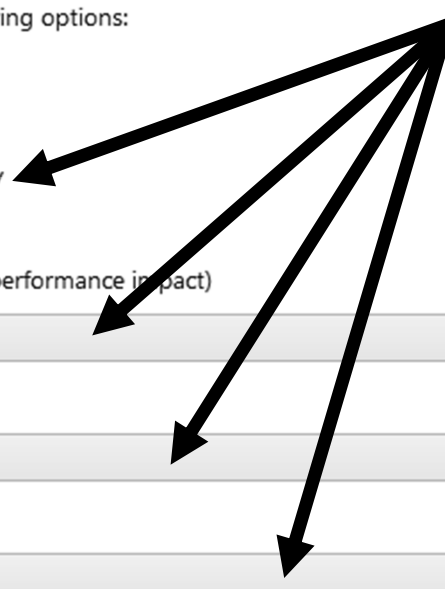
BranchNameList

Value field:

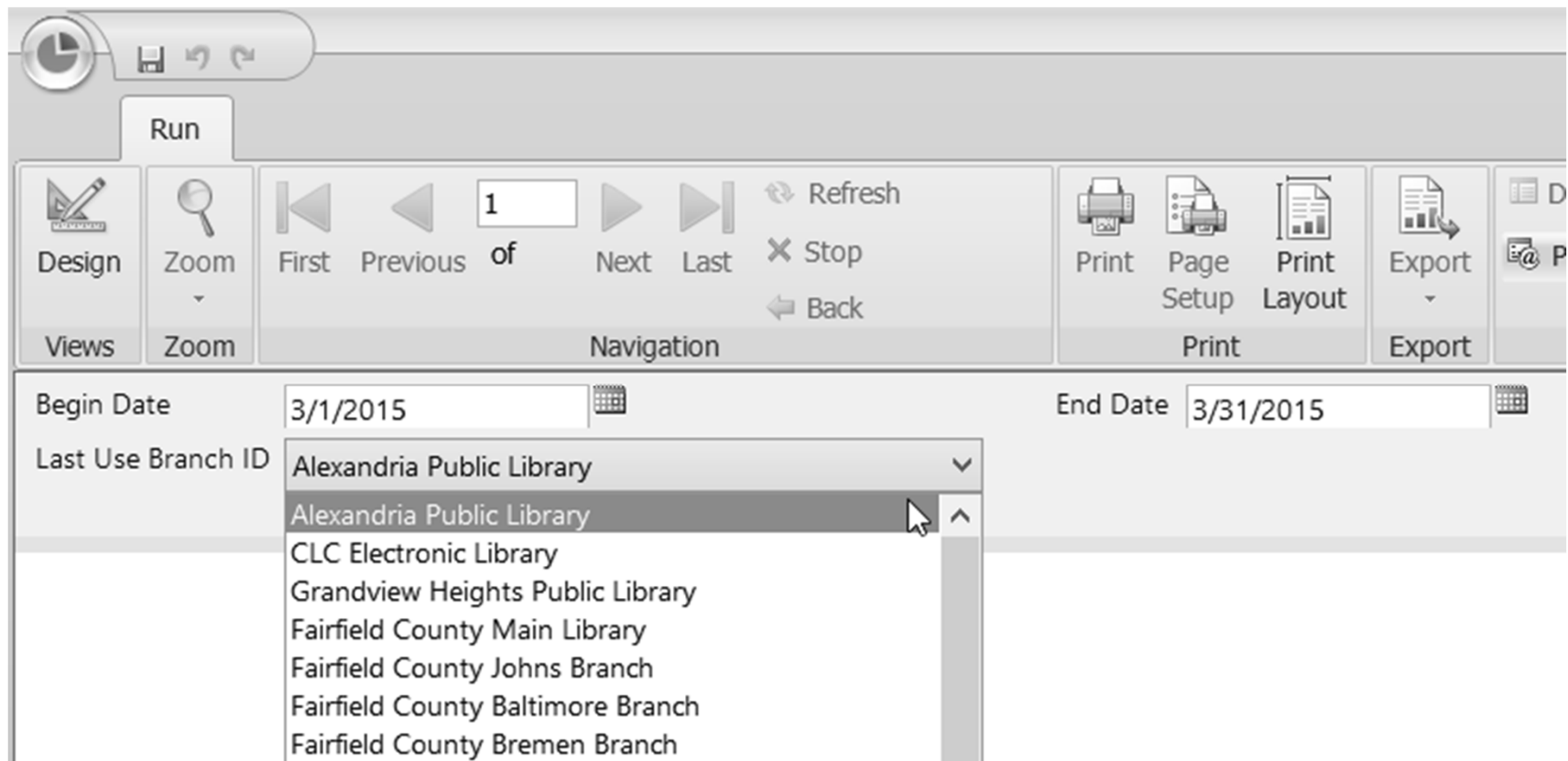
organizationid

Label field:

Name



Yeah! A list of branch names



Using SSRS Expressions f_x

Format output data

- Change colors

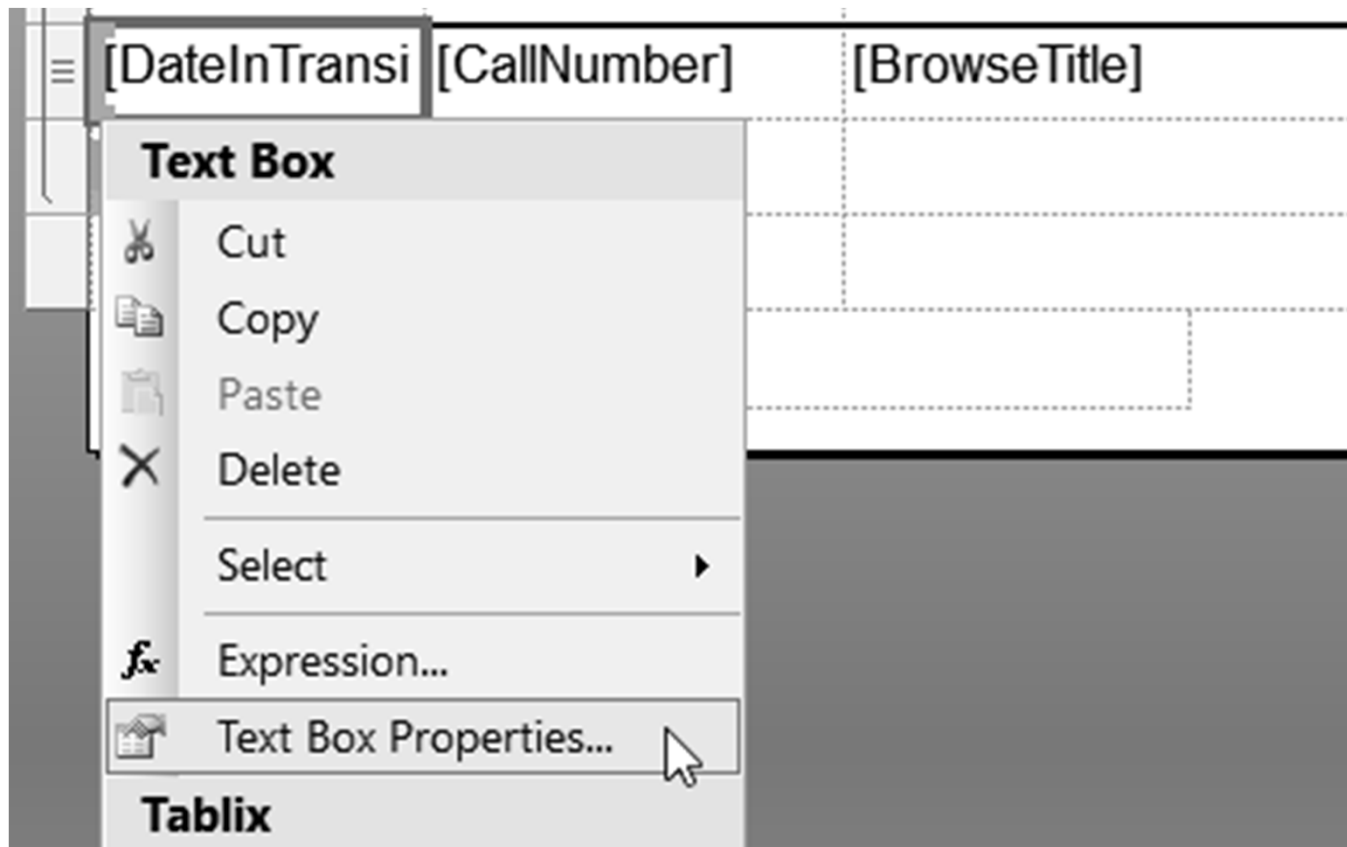
- Change fonts

Manipulate input data

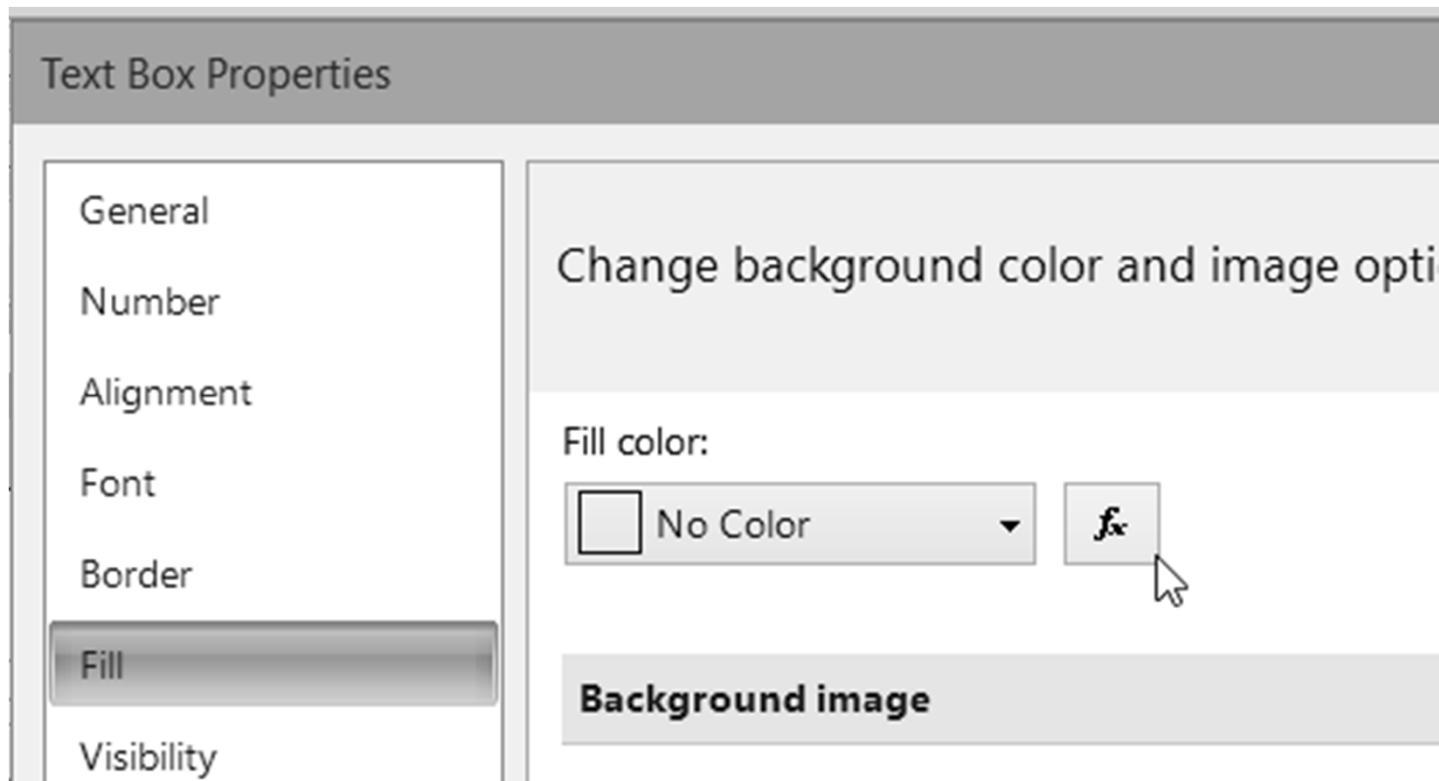
- Setting defaults

- Run verification checks

Format Output – Change Color



Using fx to setup conditional formatting



fx = Full “power” of Visual Basic Available

Expression

Set expression for: BackgroundColor

```
=iif(Fields!DateInTransit.Value < DateAdd("d",-10, Globals!ExecutionTime), "Tomato", "White")
```

Category:

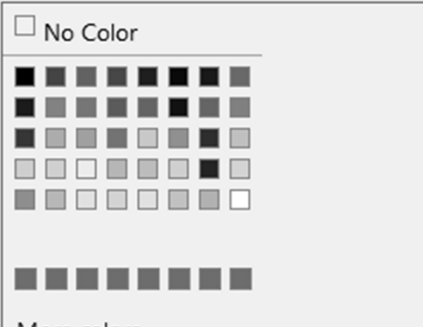
- Constants
- Built-in Fields
- Parameters
- Fields (dsInTransitItems)
- Datasets
- Variables
- Operators
- Common Functions

Item:

<All>

Values:

No Color



More colors...

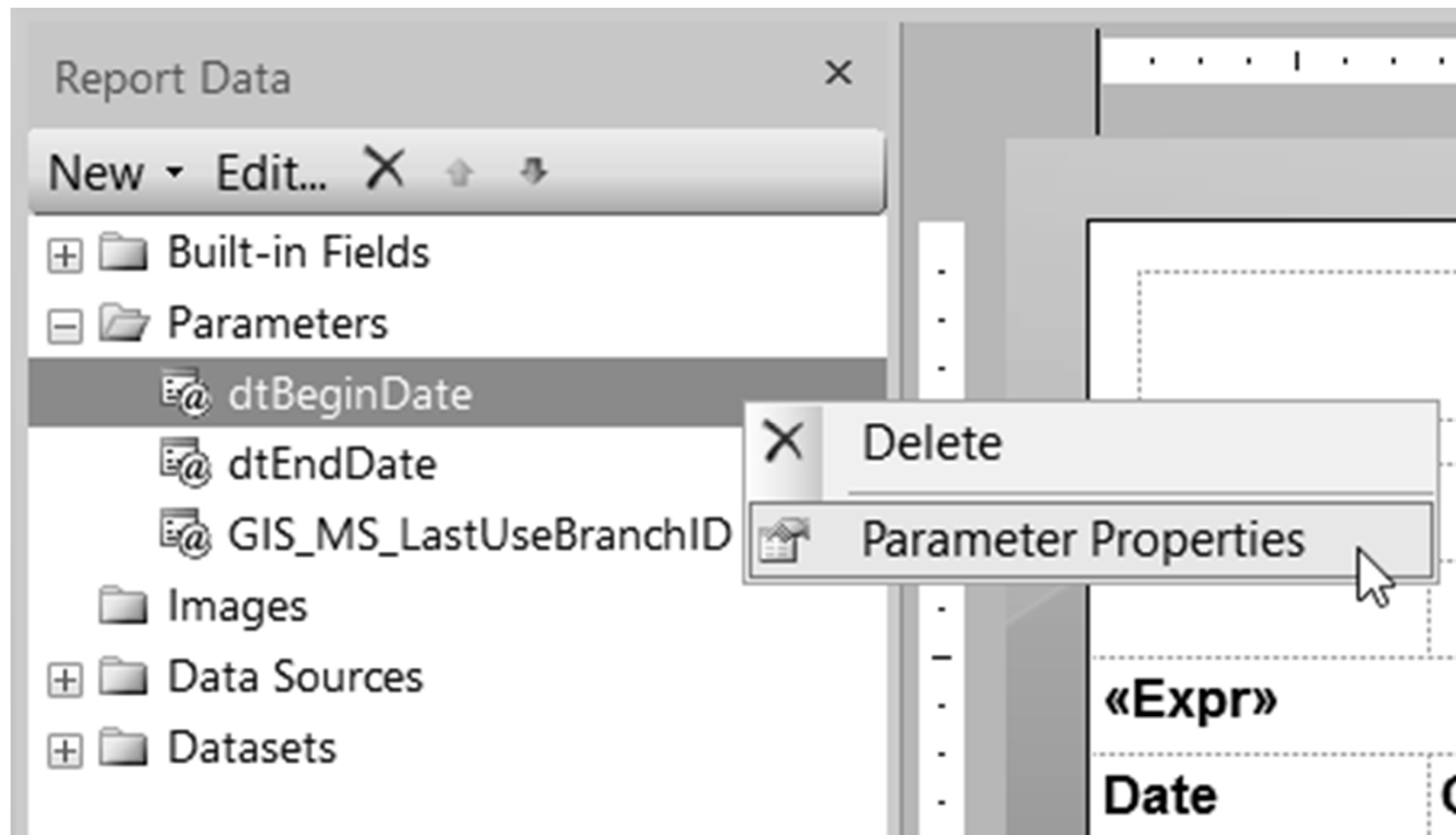
Any dates older than 10 days are in red

Begin Date End Date
 Last Use Branch

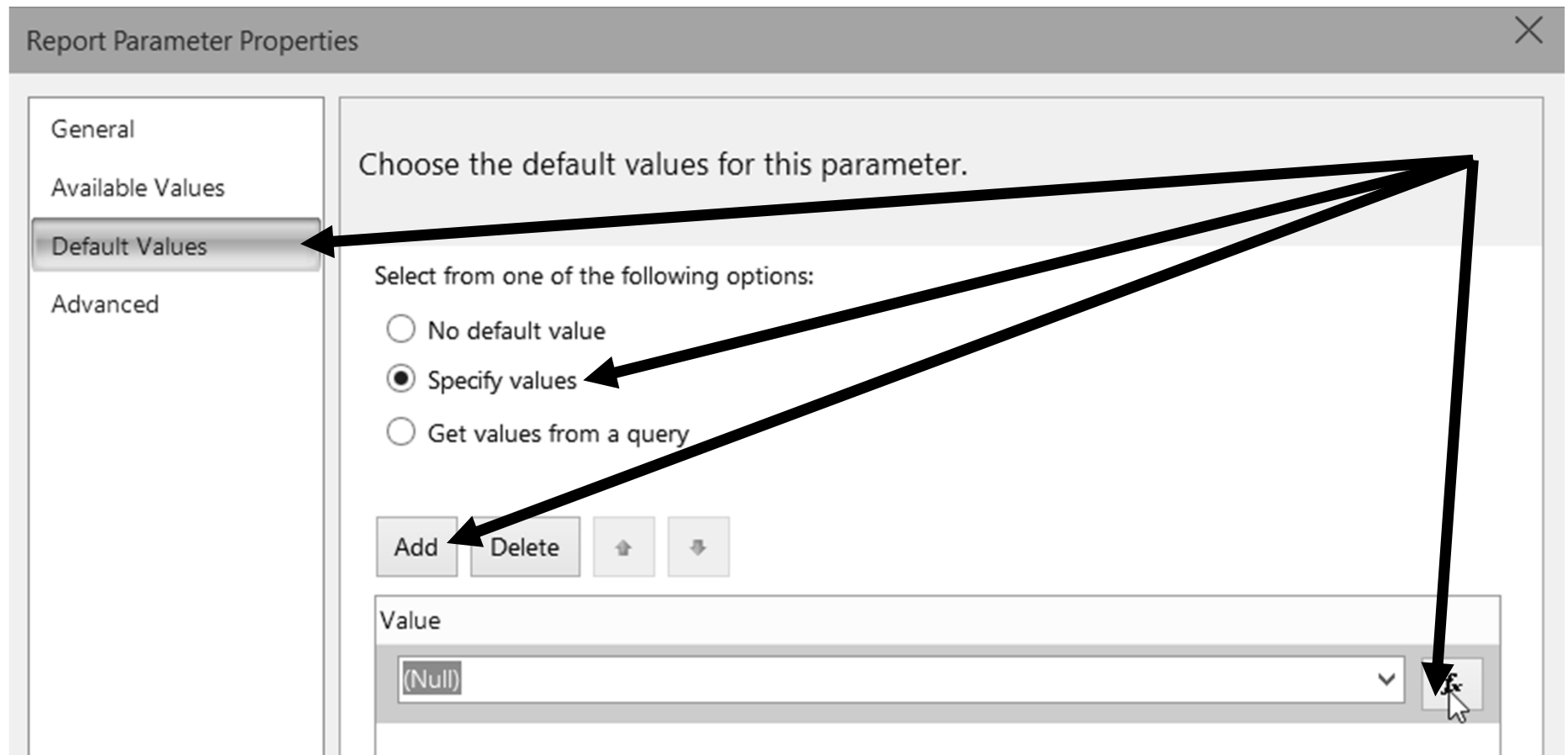
Sent From: Fairfield County Main Library

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 IUG 2015 Home | My Subscriptions | Site Settings | Help

Begin Date	<input type="text" value="3/1/2015"/>		End Date	<input type="text" value="3/31/2015 11:59:59 PM"/>		<input type="button" value="View Report"/>
Last Use Branch	<input type="text"/>					

Creating a new report

Creating a report from scratch

Build SQL statement in SQL Server Management Studio

What will report display

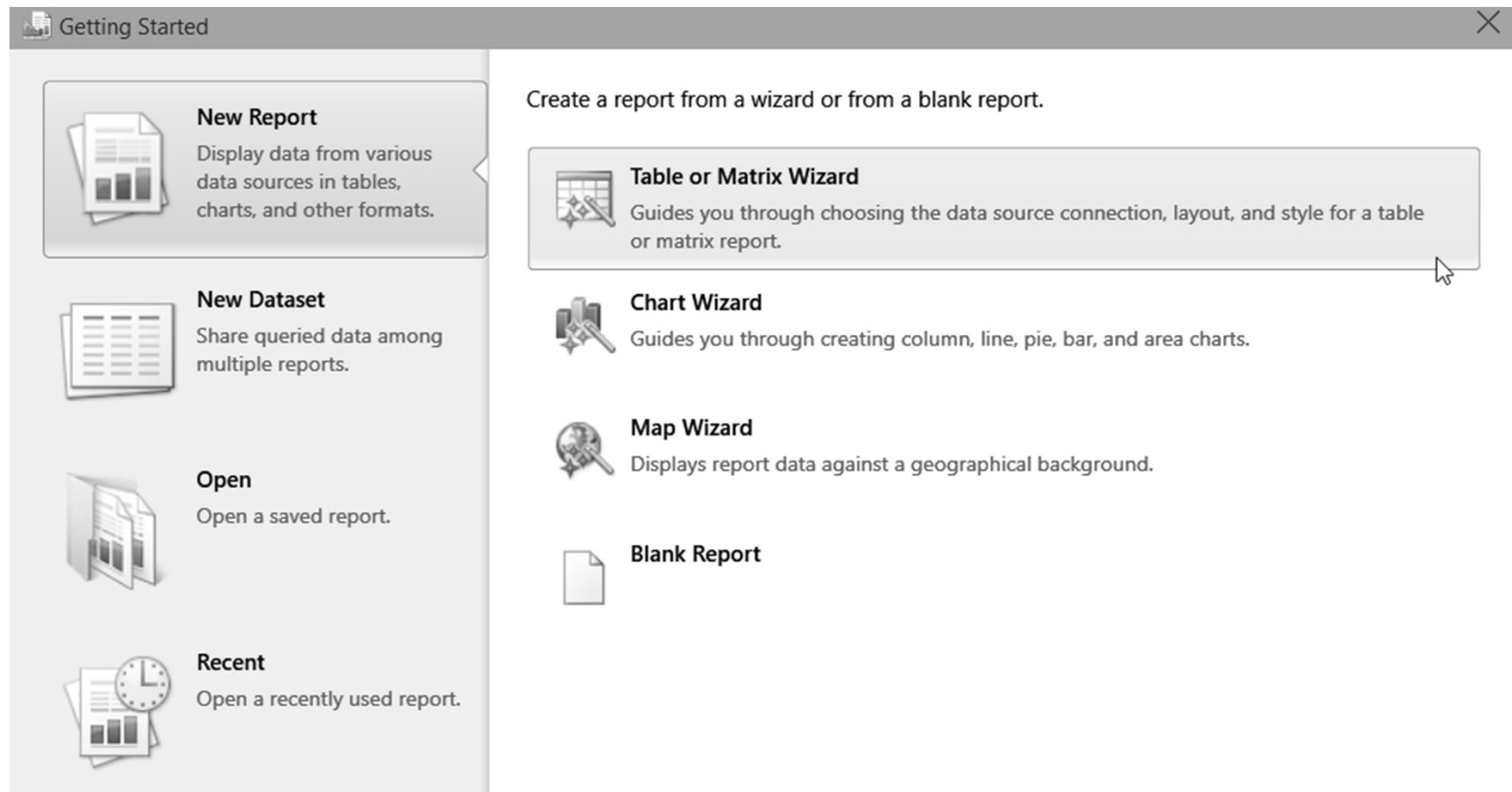
What parameters will be required

SSRS Expressions

Any formatting requirements

Any defaults for parameters

Using the Wizard to create a new report



The screenshot shows a window titled "Getting Started" with a close button in the top right corner. The window is divided into two main sections. On the left is a vertical sidebar with four options, each with an icon and a description. On the right is the main content area with a heading and four wizard options, each with an icon and a description. The "Table or Matrix Wizard" option is highlighted with a mouse cursor.

Getting Started

New Report
Display data from various data sources in tables, charts, and other formats.

New Dataset
Share queried data among multiple reports.

Open
Open a saved report.

Recent
Open a recently used report.

Create a report from a wizard or from a blank report.

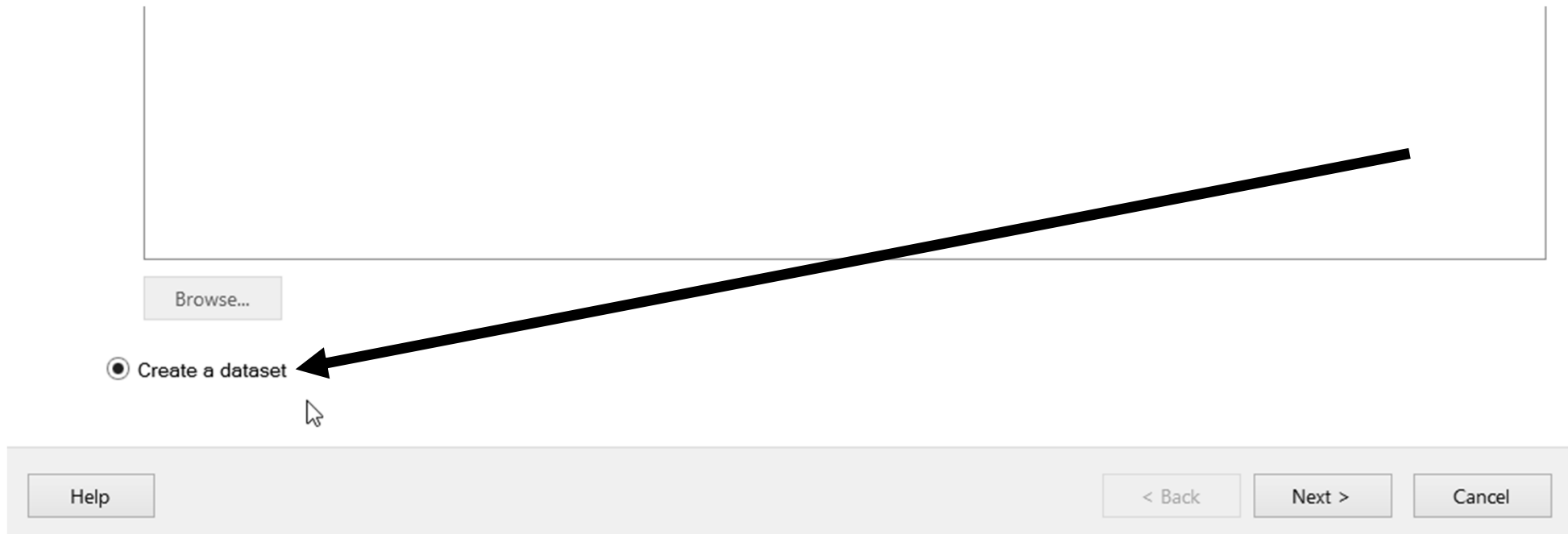
Table or Matrix Wizard
Guides you through choosing the data source connection, layout, and style for a table or matrix report.

Chart Wizard
Guides you through creating column, line, pie, bar, and area charts.

Map Wizard
Displays report data against a geographical background.

Blank Report

Dataset = SQL to be used for report

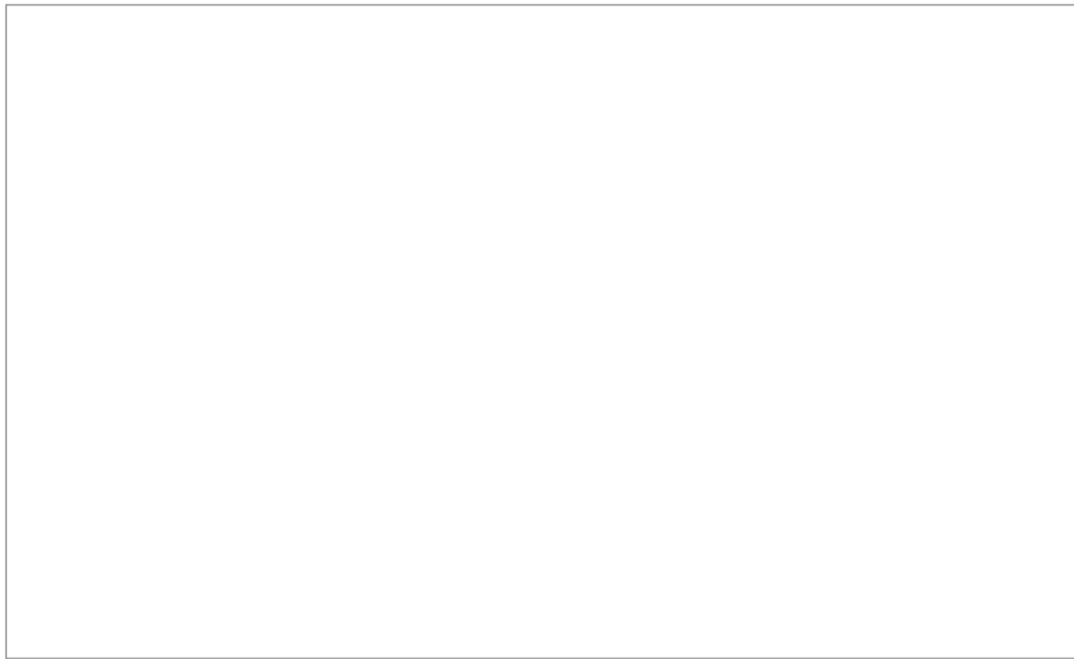


Data Source = Location of data (database)

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:

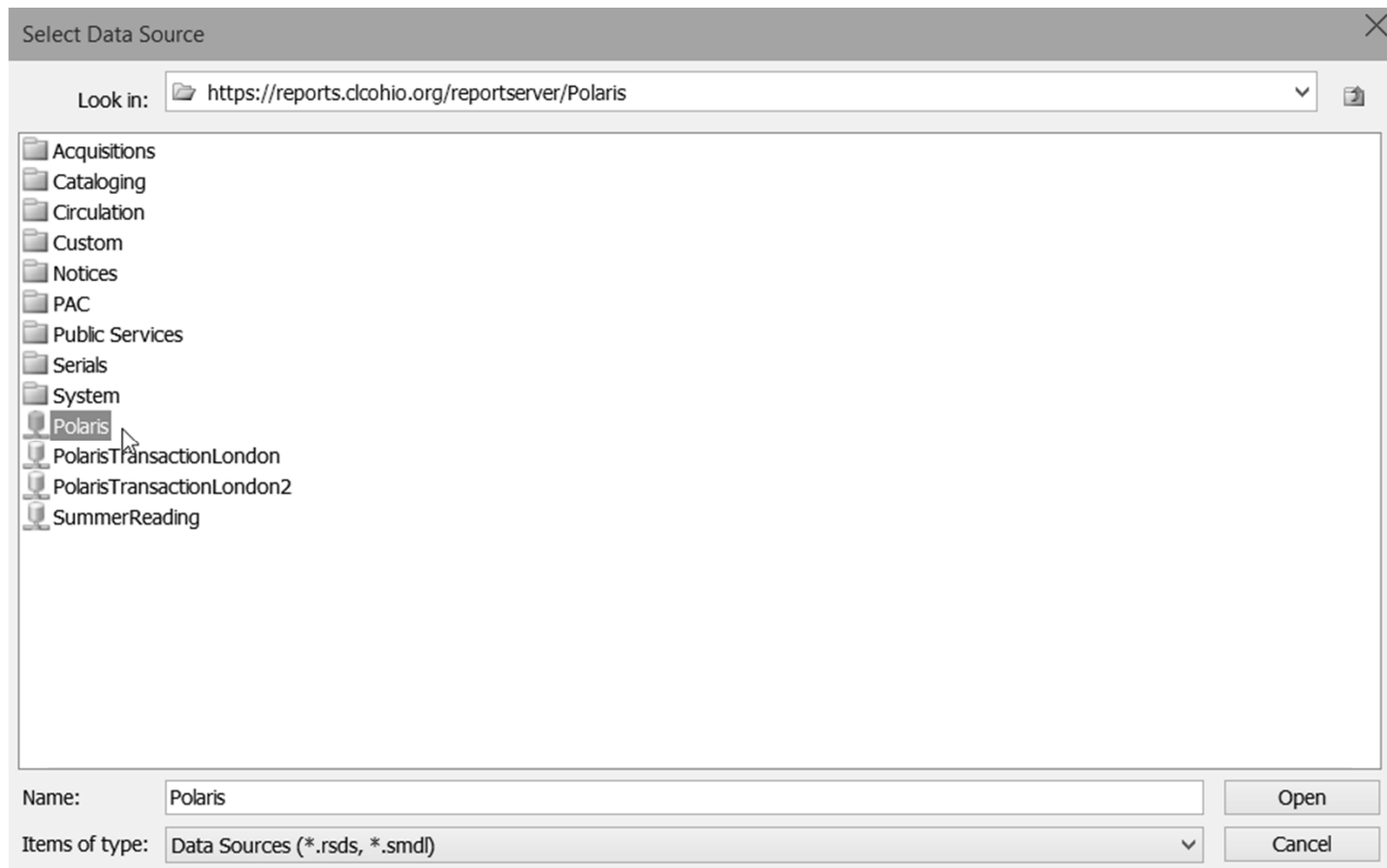
A large, empty rectangular box with a thin black border, intended for displaying a list of data source connections.

Browse...

New...

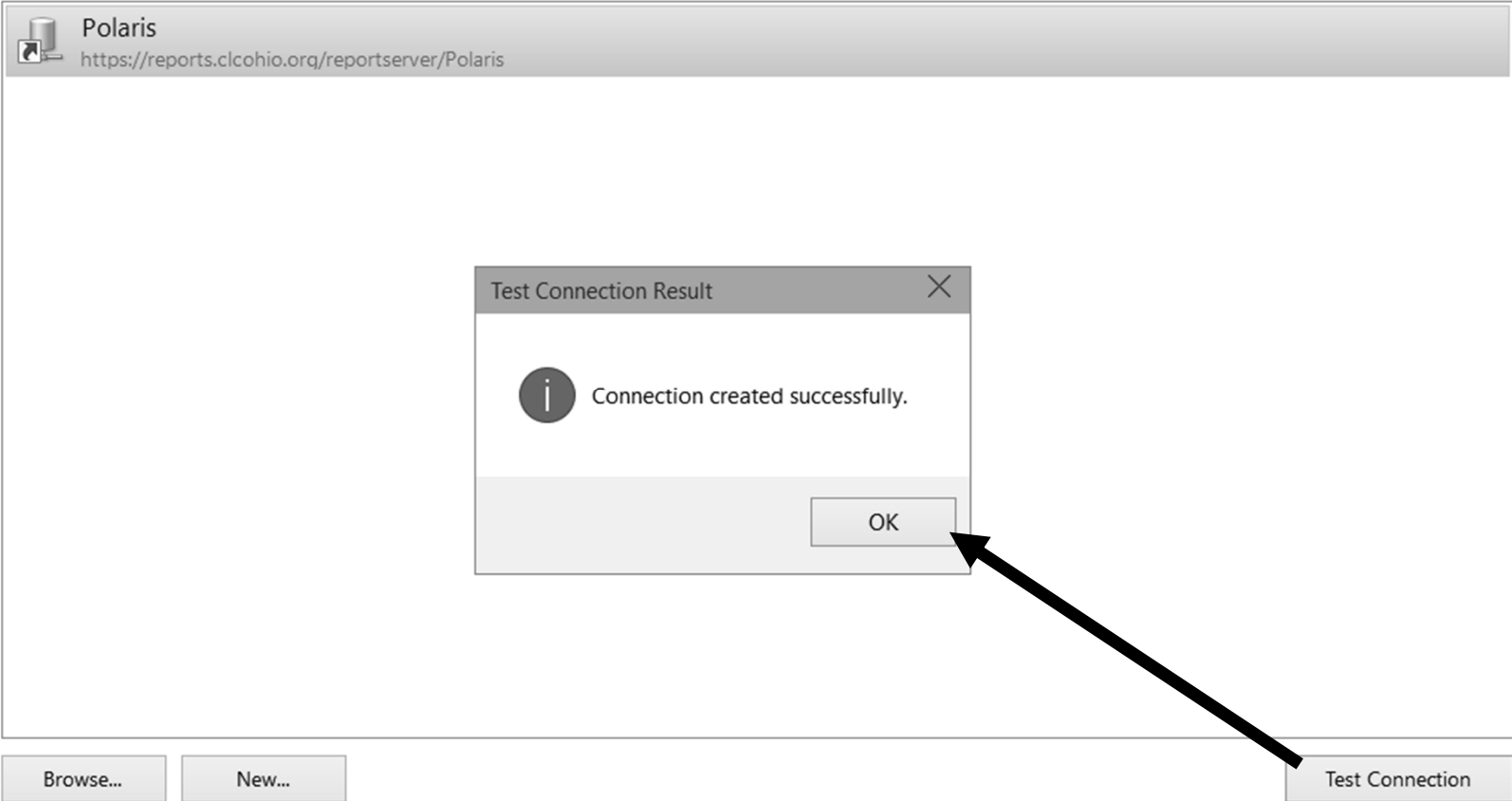


Polaris Data Source provides Access to Polaris and PolarisTransactions

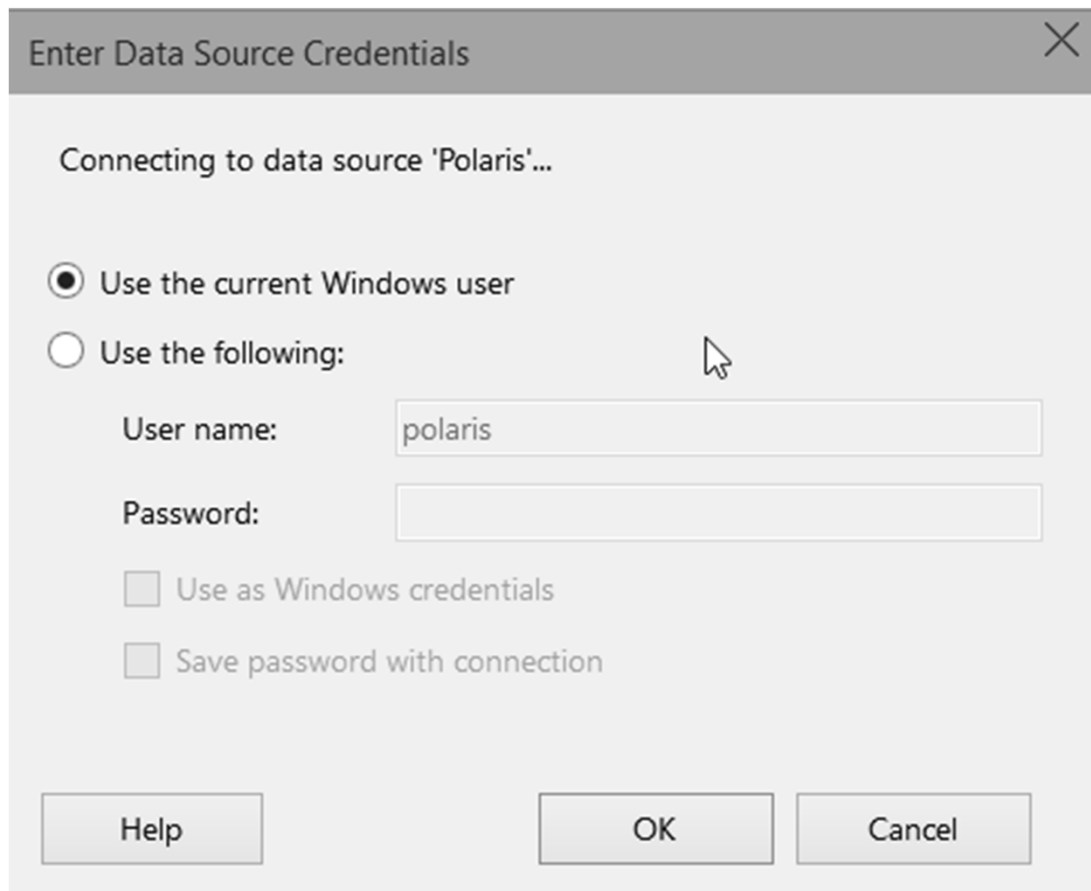


Testing ability to connect to database

Data Source Connections:



Setting up your logins, means less typing!



Enter Data Source Credentials

Connecting to data source 'Polaris'...

Use the current Windows user

Use the following:

User name:

Password:

Use as Windows credentials

Save password with connection

Help OK Cancel

The image shows a standard Windows-style dialog box with a title bar, a close button, and a standard Windows font. The dialog is titled 'Enter Data Source Credentials' and contains a message 'Connecting to data source 'Polaris'...'. It has two radio buttons for authentication: 'Use the current Windows user' (which is selected) and 'Use the following:'. Below the second radio button are two text input fields: 'User name:' containing 'polaris' and 'Password:'. There are also two checkboxes: 'Use as Windows credentials' and 'Save password with connection'. At the bottom, there are three buttons: 'Help', 'OK', and 'Cancel'.

Report will use SQL statement as data source

Design a query

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

The screenshot displays a software interface for designing a report query. At the top, there is a toolbar with two buttons: "Edit as Text" (with a document icon) and "Import..." (with a folder icon). To the right of these buttons is a "Command type:" dropdown menu currently set to "Text". Below the toolbar is a large, empty text area for writing the SQL query. A mouse cursor is hovering over the "Edit as Text" button, and a tooltip with the text "Edit as Text" is visible. Below the text area is a data grid with approximately 10 columns and 5 rows, which is currently empty. The interface has a light gray background and a clean, modern design.

Run SQL to verify that it is working properly

⚙ Edit as Text | 📄 Import... | ! | Command type: Text

```
select o.name as BranchName, pc.description as PatronCode, count(pc.description) as NumPatrons
from polaris.polaris.patrons p
join polaris.polaris.organizations o
    on o.organizationid = p.organizationid
join polaris.polaris.patroncodes pc
    on pc.patroncodeid = p.patroncodeid
group by o.name,pc.description
```

BranchName	PatronCode	NumPatrons
Alexandria P...	Full Access	2468
Bexley Publi...	Full Access	25952
CLC Electro...	Full Access	4
CML Colum...	Full Access	96972
CML Drivin...	Full Access	8919
CML Dublin...	Full Access	50473
CML Frankli...	Full Access	10266
CML Gahan...	Full Access	46858
CML Hilliard...	Full Access	58977
CML Hilltop...	Full Access	38052
CML ILL	Full Access	2

Choosing display columns and groupings

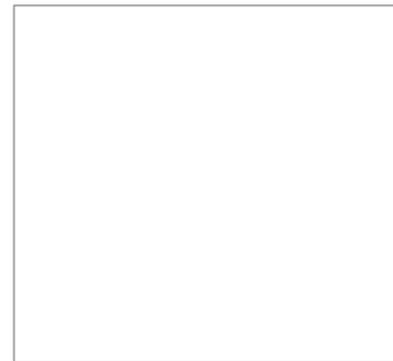
Arrange fields

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(N umPz
Total			[Sum(N umPz

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(N umPz
Total			[Sum(N umPz

Report Output

Grouping works in SSRS or Excel

Branch Name	Branch Name	Patron Code	Num Patrons
Alexandria Public Library	Alexandria Public Library	Full Access	2468
	Alexandria Public Library	Homebound	11
	Alexandria Public Library	Restricted 2	759
	Alexandria Public Library	Restricted 3	380
	Alexandria Public Library	Senior	177
	Alexandria Public Library	Staff	31
	Alexandria Public Library	Teachers/Educators	227
			4053
Bexley Public Library			33057

The screenshot shows the Microsoft Excel interface with the ribbon set to 'HOME'. The data from the report is pasted into a worksheet starting at cell A1. The data is organized as follows:

	A	B	C	D
1				
2	Branch Name	Branch Name	Patron Code	Num Patrons
3	Alexandria Public Library	Alexandria Public Library	Full Access	2468
4	Alexandria Public Library	Alexandria Public Library	Homebound	11
5	Alexandria Public Library	Alexandria Public Library	Restricted 2	759
6	Alexandria Public Library	Alexandria Public Library	Restricted 3	380
7	Alexandria Public Library	Alexandria Public Library	Senior	177
8	Alexandria Public Library	Alexandria Public Library	Staff	31
9	Alexandria Public Library	Alexandria Public Library	Teachers/Educators	227
10				4053

Which patron codes were selected?

Run

Design Zoom First Previous 1 of 2 ? Next Last Refresh Stop Back

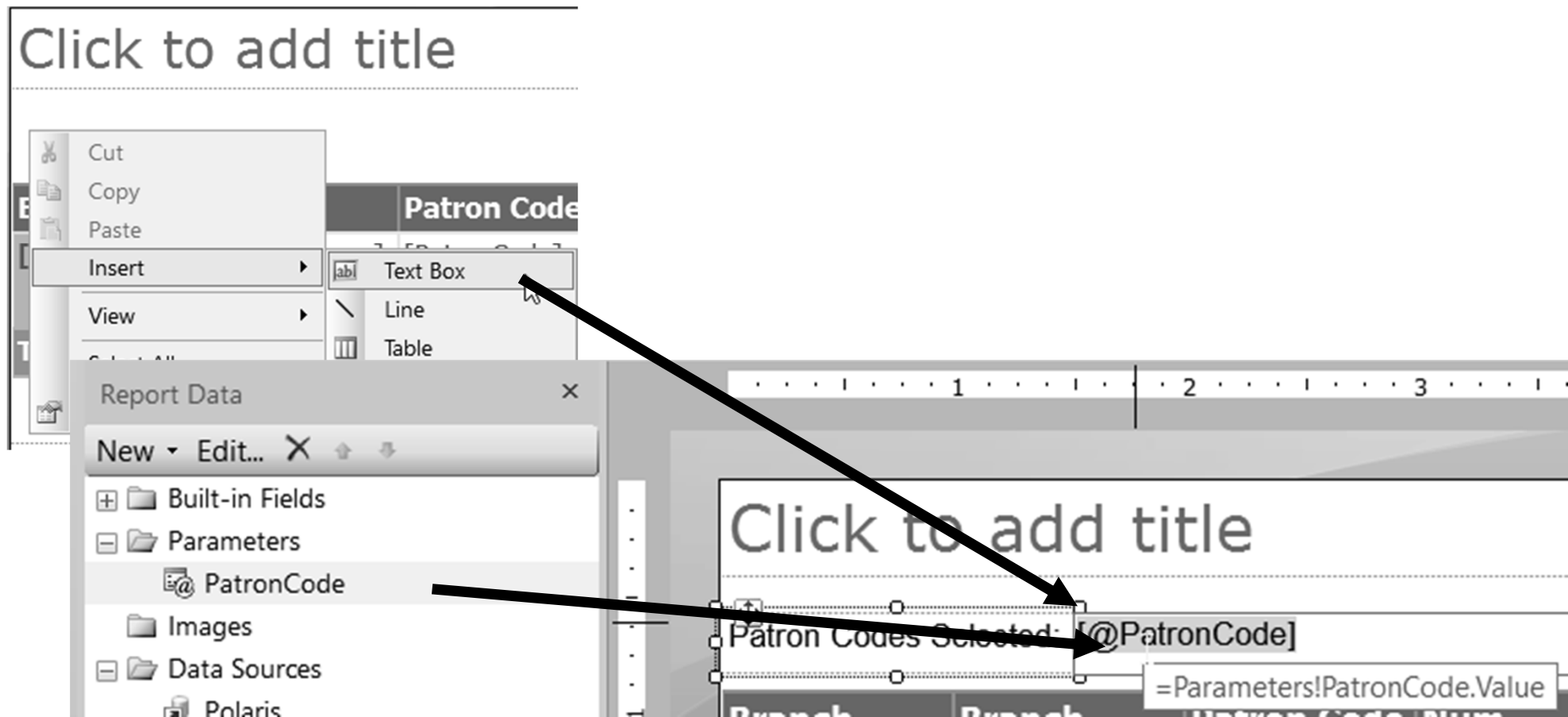
Views Zoom Navigation

Please select patron codes Full Access, Homebound

Branch Name	Branch Name	Patron Code	Num Patrons
<input checked="" type="checkbox"/> Alexandria Public Library	Alexandria Public Library	Full Access	2468
	Alexandria Public Library	Homebound	11
			2479
<input checked="" type="checkbox"/> Bexley Public	Bexley Public Library	Full Access	25952

Branch Name	Branch Name	Patron Code	Num Patrons
Alexandria Public Library	Alexandria Public Library	Full Access	2468
	Alexandria Public Library	Homebound	11
			2479
Bexley Public Library	Bexley Public Library	Full Access	25952
			25952
CLC Electronic Library			4
CML Columbus Main Library			96979

Add text boxes; drag parameter into textbox



Patron codes accepts multiple values



Selected Patron Codes: #Error

Branch Name	Branch Name	Patron
<input checked="" type="checkbox"/> Alexandria Public Library		

Change name, data type, and other options.

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:



Tooltip:


Expression

Set expression for: Value

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

Multi-value parameters now show on report output

Please select patron codes



Selected Patron Codes: Full Access,Homebound

Branch Name	Branch Name	Patron Code	Num Patrons
<input checked="" type="checkbox"/> Alexandria 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)

Home > Polaris > System

 **CLC SQL Server Report Server**
Internal

 Delete |  Move |  New Folder |  New Data Source |  Report Builder |  Folder Settings |  Upload File

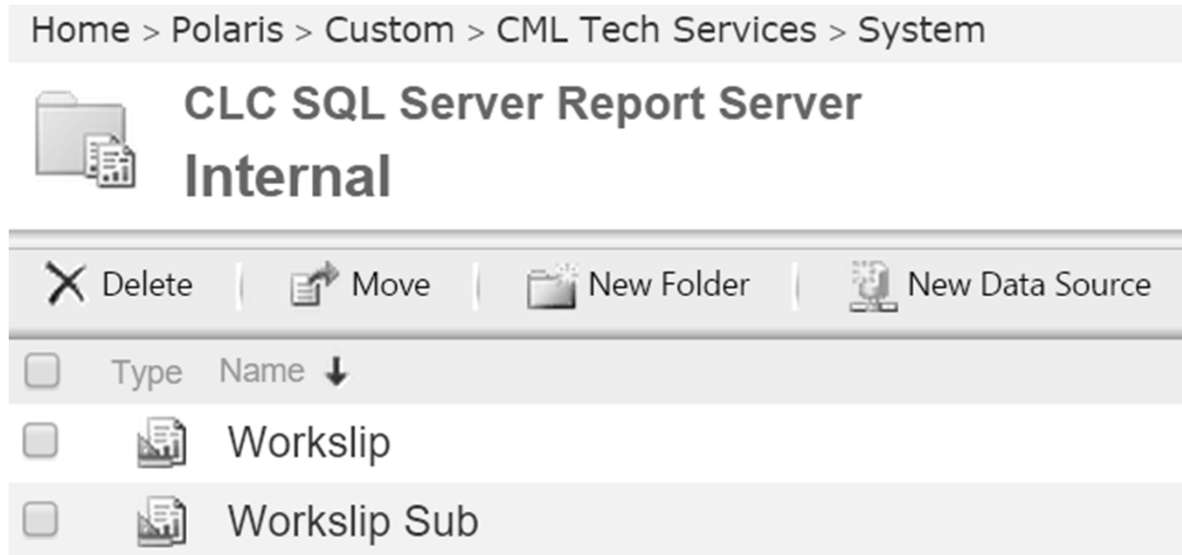
<input type="checkbox"/>	Type	Name ↓	Description
<input type="checkbox"/>	Folder	Labels	
<input type="checkbox"/>	Report	Authority Create Links Job	
<input type="checkbox"/>	Report	Authority Record Set	
<input type="checkbox"/>	Report	Authority Update Links Job	
<input type="checkbox"/>	Report	AuthorityFull	

Replacing Built-In Reports

Use same name as built-in report and place custom version in:

Custom -> Branch Name -> System -> Internal

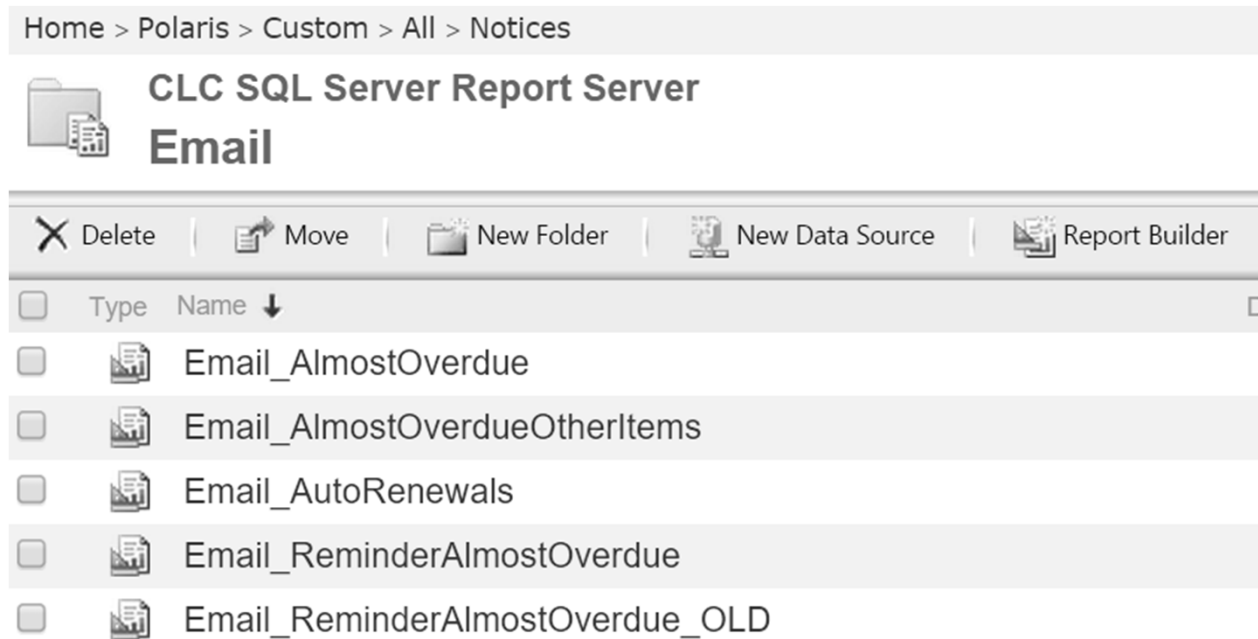
Custom -> All -> System -> Internal



Customizing Notices

Use same name as built-in notice and place in:

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



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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**CENTRAL
LIBRARY
CONSORTIUM**
CONNECTED. CREATIVE. CURRENT.