



Building Reports

Getting Started with
SSRS Reports in MP



Our Goals Today

- Understand how to navigate/add new report metadata to MinistryPlatform
- Understand new report initial setup in SQL Server Reporting Services (SSRS)
- Items of Note:
 - We will not deep dive into excessive quantities of code
 - Please make back-ups before making changes

Requirements

- Setup Administrator
- SQL server
 - SQL Server Management Studio (SSMS)
 - SSRS Web Portal (access via Report Server Configuration Manager)
- Web server
 - Event Viewer
- Basic understanding
 - T-SQL / Stored Procedures
 - MS Report Builder

Access

- Self Hosted: Contact your IT guru(s)
- Higher Ground
 - Dedicated Cloud: access granted upon request, contact HGT Support (helpdesk@highergroundtech.com)
 - Shared Customers: no access, recommend working with Professional Services on your custom report needs

Overview

1. Define your needs
2. Identify a similar report to copy and rename
Note: Never modify production reports
3. Create/Discuss the metadata (Report, Report Page, Security Role)
4. Adjust/Discuss key settings



Define Your Needs

- What information do you want in the report?
- Where in MP will that information originate?
 - Which Page?
 - Which field on the Page?
- What do you want the report to look like?
- Consider an Advanced View

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Define: RDL

- *Report Definition Language (RDL) is an XML representation of a SQL Server Reporting Services report definition. A report definition contains data retrieval and layout information for a report*
- System Setup → Reports → Report Path field on the record
- Lives in SSRS

SQL Server Reporting Services Home Search

Favorites **Browse**

Folders (2)

- Data Sources
- MPReports

Object Explorer

Connect + ✖ + ↺ ↻ 🔊

- [-] 🗄️ [REDACTED]
- [-] 📁 Databases
 - [-] + 📁 System Databases
 - [-] + 📁 Database Snapshots
 - [-] + 🗄️ MinistryPlatform
 - [-] + 🗄️ MinistryPlatformTesting
 - [-] + 🗄️ [REDACTED]
 - [-] + 🗄️ ReportServer
 - [-] + 🗄️ ReportServerTempDB
- [-] + 📁 Security
- [-] + 📁 Server Objects
- [-] + 📁 Replication
- [-] + 📁 PolyBase
- [-] + 📁 Always On High Availability
- [-] + 📁 Management
- [-] + 📁 Integration Services Catalogs
- [-] + 🗄️ SQL Server Agent
- [-] + 📁 XEvent Profiler



Define: Stored Procedure

- SP / Sproc / Stored Procedure
- *A stored procedure is prepared SQL code, saved so the code can be reused over and over again. Parameters can be passed to a stored procedure, so it can act based on the parameter value(s) that is passed.*
- Dataset in the RDL
- Lives in SSMS