



# **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
- 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?
  - O Which Page?
  - Which field on the Page?
- What do you want the report to look like?
- Consider an Advanced View



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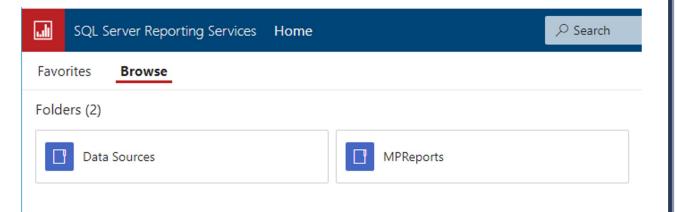


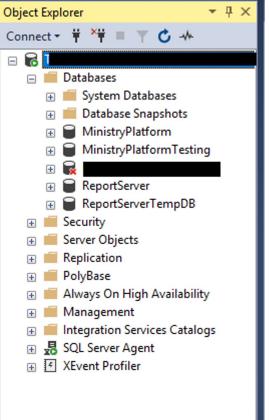


## Define: RDL

- 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









### **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

