SHAREPOINT 2016 AND SSRS 2016/17





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In this eBook we will look at SSRS 2016/2017 with SharePoint 2016 in detail and in particular:

- What SSRS is and how it fits into the Microsoft BI stack
- The various components that make up the SSRS toolset
- What's new in SSRS 2016/2016
- How to set-up SSRS to be used with SharePoint 2016
- How to write a SharePoint 2016 Report using the OOB connectivity
- How to configure SSRS 2016 SharePoint integrated mode with SharePoint 2016
- Using SSRS to report on SharePoint Online and SharePoint 2016 data.

WHAT IS SQL SERVER REPORTING SERVICES (SSRS)?

SQL Server Reporting Services, part of the Microsoft BI stack, is a Server-based report builder software provided by Microsoft which allow us to create and manage a range of reports and dashboards from different data sources with a large variety of data <u>visualizations</u>

The SSRS service provides an interface in Microsoft Visual Studio as **SQL Server Data Tools** so that developers and SQL Administrator can connect to SQL databases and use **SSDT tool** to implement SQL reports.

Nontechnical users can use **Report Builder** tool provided by SSRS to format SQL less complex reports. You can extend reporting functionality by means of C# and VB as programming languages.

Users van either interact directly with Report Server Web Service (RSWS) or use Report Manager (A Web-based application that interacts with the Report Server Manager).

Users can view, subscribe to, organize, and preserve data sources and Security Settings.

All these reports can be viewed through a browser.

RDL defines Reports which can <u>be downloaded</u> to various format like Excel, PDF, CVS, XML and HTML Web Archive.

Report Manager provides functionality to send SQL reports by **e-mail**, also the user can place them into **file share**.

SSRS provides a host of security features, to control, who sees which reports etc.

SSRS provides a **role-based** security model<u>. Security</u> can be assigned to an entire site, folders of items, individual report or data source.

By default, Security roles are inherited and it can be overloaded.

SSRS administered by a web interface, which can be used to produce variety of interactive and printed reports

RDL reports can be viewed by Standalone Report Server associated with Microsoft SQL Server, or by using ASP.NET Report viewer control, or report viewer (Windows Forms control).

SQL Server Reporting Service solution customers deploy on their <u>own</u> premises for <u>organizing</u> and publishing reports. These reports can <u>be sent</u> to the particular user in numerous ways. These reports can view on all platform like the web browser, mobile or email.

The **ad-hoc reports** also supported by SSRS, the designer can develop a report and deploy the same on the reporting server, while the user can choose applicable fields/data to generate reports.

SSRS ARCHITECTURE



This architecture contains following types of components and tools.

- ✓ Report Builder
- ✓ Report Designer
- ✓ Report Manager
- ✓ Report Server
- ✓ Report server database
- ✓ Data sources

REPORT BUILDER

Report Builder is Standalone development tool to create Reports outside of SQL Server Development Tools (SSDT Visual Studio).

At the time of Report designing, the user needs to specify "Where to get Data", "Which Data to get", and "How to display Data".

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While running the report, the report processor uses all the information user have specified, retrieve associated data and combines it with Report Layout to generate the report.

This tool can be used by the non-technical user to authoring the report as its easier to use.

REPORT DESIGNER

Report Designer tool used to create Simple as well as complex report using SQL Server Development Tools (SSDT Visual Studio)

Its provide the graphical interface in which user can define "data sources", "datasets", "queries".

The user can also define "Report layout positions for data regions and fields".

The user can also define interactive features like "**Parameters**" and "**Sets of reports**" that work together.

REPORT MANAGER

Report Manager is a Web application to access and configure reports.

Report Manager can be accessed over the **remote location** with HTTP connection.

User can use Report Manager **to access** the folders and **search reports** with its general property along with **historical copies** of report that are saved in "**report history**."

Report Manager is **only working** with the report server that runs in **Native mode**, it's **not supported** by **SharePoint integration mode**.

User can open Report Manager with <u>http://ServerName/Reports</u> ("ServerName is name of the server where Report Manager is deployed")

REPORT SERVER

A Stateless Server uses the SQL Server Database Engine to store Metadata and Object Definitions.

REPORT SERVER DATABASE

Native Mode Report Service Installation use two databases to separate persistent data storage from Temp Storage requirement.

Those databases are created simultaneously and bound by their name.

Name of Databases are

- ReportServer
- ReportServerTempdb

REPORT SERVER DATABASE

It's stores

- Reports, Shared Data Sources, folders etc.
- Execution logs
- Encrypted connections and symmetric keys.
- Credential for data sources.

REPORT SERVER TEMP DB

It's store

- Session and execution data
- Cached report
- Work report generated by report server

For SharePoint integration mode, a user needs to configure the "**Manage reporting Service Application**" service from central Administration.

DATA SOURCES

Reporting services can consume data from relational as well as multidimensional data sources.

WHY WOULD IT BE USED?

The company has lots of data collected from various location and various sources.

With this plain textual data company not able to get insights of data and failed to decide due to the same.

That is where SSRS comes into the picture, SSRS consume data from various data sources and create analytics chart based on parameters and filters which help end users to get proper insights of data and based on insights company will take require the decision.

The company can experience various advantages of SSRS, some of are:

EASE OF DEPLOYMENT & CENTRALIZED REPORTING

Reports are stored in the centralized server since report are centralized, end users can get all the reports from one place and which makes overall deployment process easier.

EASY EXPORT TO MULTIPLE FILE FORMAT

The user can able to access and share reports in HTML, CSV, XML, PDF, and images (TIFF), SSRS also offer complete rendering in MS Word and Excel. Since reports are fully editable in MS office suite hence end, user can create the custom document based on their requirement.

DEVELOP CENTRALIZED REPORTING PORTAL

Organization can bring together all structure and non-structure data from across the company at one centralized location which help end users to see business performance at one glance

MAKE THE REPORT BASED ON SCHEDULE BY REPORT SUBSCRIPTION OPTION

SSRS support both standard and data-driven subscription; one can share SSRS report via Email or file share to the particular user. The user also gets reports based on a schedule and report parameter value.

SORTING & DRILL DOWN CAPABILITY

Users can apply sorting functionality on any column in ascending or descending manner also they can easily drill through any composition of the data pattern in the database.

SECURITY

SSRS implements roles based security model to protect reports; this means every employee of organization can only allow access to report based on their authorization.

WHAT IS NEW WITH SSRS IN SQL 2016/17: -

2016 SSRS: -

Microsoft released many new features in Reporting Services with the SQL 2016 release:

- ✓ Paginated reports
- ✓ Mobile reports
- ✓ Web portal

PAGINATED REPORTS

This report is ideal for fixed layout documents used for printing, for example, PDF.

Users can create the report with minimalist modern style.

Users can arrange parameter however they want.

users can create hybrid POWER BI experience, hence instead of recreating POWER BI in an on-premise server, they can reuse some of the components from those reports to Power BI.



MOBILE REPORTS

Microsoft has added new report type i.e. Mobile report which incorporated with responsive layout.

Hence the user can create the report in Mobile Report Publisher and PowerBI Apps for the mobile device for Windows 10, IOS, Android, and HTML5.

A user can access data which is hosted in POWER BI Cloud and on-premise SQL 2016 Reporting Service.

As user create visualization, Mobile Report Publisher automatically generates Data for each visualization



WEB PORTAL

The Web portal is the presentation layer for all end users of native mode Reporting services, which can be view in any latest browser

The user can have access to all Reporting Service mobile, Paginated reports, KPIs and POWER BI desktop reports in the Web portal.

The user can write Custom KPI directly in Web portal also can apply custom branding.

The web portal is more like a Report Manager with the Single page, HTML 5 app.



2017 SSRS: -

From SSRS 2017, Microsoft has separated the SSRS installation package from SQL Server installer

If an organization has SQL Server Reporting Database (from 2008 to 2017), they can easily download & install reporting service.

Now since this installer is separated from SQL Server installer, hence the user can install the latest version of Reporting Service and it has zero impact on SQL Server Databases or features.



REST API

REST API gives programmatical access to the many objects of reports server catalog like

- Folders
- Reports
- KPIs
- Data sources
- Datasets
- Refresh plan
- Subscription and more

Using REST API, user can

- Folder hierarchy navigation
- Search content of folder
- Download report definition
- Can perform CRUD (Create, Update, Delete) operations on objects like
 - Upload a report
 - o Delete a folder
 - o Execute refresh plan

Microsoft has built OpenAPI Specification (Swagger Specification). This SwaggerHub helps the user to generate Client library in JavaScript or typescript, Java, C#, Ruby and many more. Hence the user can choose whatever language they prefer to generate client library.

REPORT VIEWER FOR SHAREPOINT & DOT NET

If the developer has ASP.Net Web Forms App with Report Viewer Control to integrate Paginated RDL reports then Developers can download latest NuGet package for Dot Net & integrate Cross browser printing, modern Browser support with the modern look.

Developers also integrate Report viewer web part into SharePoint 2013 – 2016 and get benefits like Show or hide particular toolbar buttons, override report parameter values and connect Filter web part with report parameter and this all can be achieved without SharePoint Integration mode.

REPORT COMMENTS

Comments facility has been enabled for reports, hence end user can start the discussion about a particular report.

Attachment functionality also integrated with comments.

The administrator can manage permission about comments like who have authorized to read or write comments at the folder level or report level.

POWER BI REPORT SERVER

POWER BI report server includes all capability of SSRS and administrator can migrate all SSRS report into POWER BI with entire report server database.

HOW TO SET-UP SSRS TO BE USED WITH SHAREPOINT 2016: -

The Reporting Services report server can be configured in SharePoint mode to run in the SharePoint Environment.

Report Server can use reporting service content types in SharePoint.

Appropriate version of Reporting Service is required to installed in SharePoint environment

There are Two types of installation mode of Reporting Service: "Native" mode and "SharePoint-integrated" mode.

Native mode can be installed on a Standalone machine, and a user wants to take advantage of SharePoint features like "Power View" they can configure Native report into SharePoint Integration mode.

SharePoint Administrator support is requiring for configuring reports in SharePoint Integration mode to implement changes in Central Administrator and published the SSRS reports into SharePoint page.

Native mode offers full features of reporting service like the paginated report, web portal, KPIs and many more.

SharePoint 2016 mini roles were attempted to offload SharePoint from some functionality.

- ✓ Front-end
- ✓ Application
- ✓ Distributed cache
- ✓ Search
- ✓ Custom

From SQL Server 2017, there will be only one installation mode for Reporting service which is native mode.

- ✓ Embedding reports in SharePoint pages. The user can embed all types of reports into "Page Viewer" web part using rs: Embed=true URL parameter.
- Reporting on data in SharePoint lists. The user can use the Native connector for SharePoint list data in Report builder and PowerBI to query SharePoint data and report analysis.
- ✓ Delivering reports to SharePoint libraries. Since Microsoft have planned to develop a "SharePoint Delivery Extension" with native mode, hence user can schedule reports in various format like word, PowerPoint, pdf etc. to SharePoint document library

CONFIGURATION OF SSRS 2016 INTEGRATED MODE WITH SHAREPOINT 2016

SQL Server Reporting service has changed a lot in SQL 2016. The process to set up SSRS in SharePoint 2016 is change a little.

Process involves:

- Installation in the SharePoint
- Create and configure Service Application
- Deploy solutions
- Document library configuration to store reports.

INSTALLING SSRS ON SHAREPOINT SERVERS

While running in integration mode, SSRS needs to install on any server within SharePoint farm as SSRS deployed as SharePoint service application.

Min role is relatively new to SharePoint 2016 and SSRS does not support any role than the custom role.

If server is not running the custom role, SSRS installation can be done but SSRS will shut down by role engine during next maintenances windows

User can check server roles using:

Central Administration => System Settings => Servers => Convert Server role in the system

This will redirect to role conversion dialog

If the role is set to custom, its fine else user needs to change with "New Role" drop down.

Once role is properly configured, SSRS can be installed,

SSRS integration mode can be found in "Shared Features" collection.

Feature Selection Select the Evaluation features to install. Product Key License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Seture Selection Feature Selection Feature Rules Reporting Services - Native Shared Features Data Quality Services - Native Shared Features Microsoft Update PolyBase Query Services - Native Shared Features Beporting Services - Native Shared Features Data Quality Client Beporting Services - Native Shared Features Data Quality Client Disk Space Requirements Disk Space Requirements Disk Space Requirements Disk Space Requirements Disk Space Required, 1006550 MB Select All Installation Progress Complete Select All Unselectory: Ct/Program Files/Microsoft SQL Server/ Select All Instance root directory: Ct/Program Files/Microsoft SQL Server/	5	SQL Server 20)16 CTP3.3 Setup		×
Instance root directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\		SQL Server 20 install. Features: SQL Server Replication Advanced Analytics E Full-Text and Semanti Data Quality Services PolyBase Query Service Analysis Services - Nativ Shared Features Reporting Services - Nativ Shared Features Reporting Services - Share Reporting Services - Share Client Tools Connectivity Integration Services Client Tools Connectivity Select All Unselect All	Atensions c Extractions for Sea e for External Data re sPoint of SharePoint Proc >	Feature description: The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on Prerequisites for selected features: Already installed: Windows PowerShell 2.0 Microsoft .NET Framework 3.5 < III >> Disk Space Requirements Drive C: 2479 MB required, 108650 MB available	
Shared feature directory: C:\Program Files\Microsoft SQL Server\ Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\		Instance root directory:	C:\Program Files\Mic	crosoft SQL Server\	
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		Shared feature directory (x86):	C:\Program Files (x86	i)\Microsoft SQL Server\]

It contains two options:

- **Reporting Services- SharePoint**: This is main SSRS Service Application. This needs to install on any SharePoint server to render the reports.
- **Reporting Services Add-in for SharePoint ...**: This option establishes connection between SharePoint server and the instance of SSRS Service application.

After this, click "next" and "finish", SSRS will be installed on a server.

CREATE AND CONFIGURE SSRS SERVICE APPLICATION IN CENTRAL ADMINISTRATOR

Verify user account which is creating Service application is the member of Farm Administrator group for the farm.

FOLLOW BE STEPS TO CREATE SSRS SERVICE APPLICATION

Central Administrator => Application Management => Manage Service Application

On "Manage Service Application" page click "**New**" and click "**SQL Server Reporting Services Service Application**"

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PerformancePoint Service Application Project Service Application	Server Reporting Services Service Application Proxy	SQL Server Reporting Services Service Application Proxy	Started	
Search Service Application	vice	State Service	Started	
Secure Store Service	e Service	State Service Proxy	Started	
SQL Server PowerPivot Service Application Service Service Application	d Health data collection	Usage and Health Data Collection Service	Started	
User Profile Service Application	ge and Health data collection	Usage and Health Data Collection Proxy	Started	1
Visio Graphics Service	ile Service Application	User Profile Service Application	Started	
Word Automation Services	r Profile Service Application	User Profile Service Application Proxy	Started	
Work Management Service Application	aphics Service	Visio Graphics Service Application	Started	
Vis	io Graphics Service	Visio Graphics Service Application Proxy	Started	
Word Au	utomation Services	Word Automation Services	Started	
Wo	ord Automation Services	Word Automation Services Proxy	Started	
javascript;	anagement Convice Application	Work Management Service Application	Started 2	
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A configuration dialog will be open where the user can enter "Name of Service" and another relevant parameter.

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Create	com/Console/47012412-8824-43de-a123-9 eSoft Server 2013 9 gnte2015-59 eApplications - Windows Internet Explorer http:/w159:2013/_admin/ServiceApplications.apx explored SQL Server Reporting Services Specify the settings for a new SQL Server Reporting Services (SSRS) Service Database Use of Windows authentication is strongly recommended. To use SQL authentication, specify the stored credentials which will be used to connect to the database and if the stored credentials should be used as Windows Credentials. Note: The account that is used to provision the database is the application pool identity of SharePoint Central Administration. Learn more about database settings	ec655036d4bb?rc=10 ervices Service Application *SQL Server Reporting Services Service Application. Tegister new managed account Database server: w15-sp Database name: ReportingService_4c46420b7fb749f3b2e8918a Database authentication:		☆ • • 1 Hr-45 Min Remaining ●
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Its good practice to change Database name as default name contains GUID.

There will be 3 databases created for SSRS services, one is mention above and two other databases which will use above Database name as the base.

You can also active SSRS feature in all Site collections if required, the same can be done from particular site collection as well.

REPORT LIBRARY CREATION

The user can create document library from SharePoint server. Don't select "Report" or "Report Document Library" template while creating Document library as it has no connection with SSRS. Simply select a Simple document library.

ADD SSRS CONTENT TYPES TO THE LIBRARY

- Go to library settings
- Advanced settings
- Enable use of content types
- Add "SSRS content types" by add from existing content types.
 - Select "SQL Server Reporting Services content types"
 - o Select "Data Connection"
 - Select "SSRS Reports"

Please note: Don't use "**Report Builder Model**" content types if it's not required as it is depreciated and used with backward compatibility

Site Collection List ×	S Add Content Types	×	H û	server 2012 on localho	st	M ~	- 0	×
\leftrightarrow \rightarrow C \odot win-33aloe0r	m8f5/sites/BI/_layouts/15/A	ddContentT	ypeToList.aspx?List=9	57B15143A60-36F9-4E1E-/	AB27-D72CA11	91F66%7D	4	:
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After this, SharePoint Administrator can remove "**Documents**" content types and create **new reports** or **data source** in this document library.

Now library can be used to store reports.

HOW TO WRITE AN SSRS USING SHAREPOINT 2016 LIST DATA

Microsoft has declared that from SSRS 2017, there will be one installation mode for Reporting Service which is "**Native**" mode.

It will be Stand Alone Business Intelligence Solution on SharePoint.

As mentioned in above section <u>What's new in SSRS 2017</u>, there are many new features introduced with SSRS 2016/17

- Web Portal
- Paginated Report
- Mobile Reports and many more.

Native Mode Reporting service integration with SharePoint gives benefits:

Embedded reports in SharePoint Page: embed all reports types in a Page Viewer Web part using the **rs: Embed=true** URL parameter.

Reporting on data in SharePoint lists: the Native connector is used with PowerBI and Report Builder to query SharePoint data and visualize in reports.

Place reports to SharePoint Library: SharePoint delivery extension for native mode available soon to delivery reports in Document Library.

INSTALL SSRS IN NATIVE MODE

While installation SQL Server set up, Administrator needs to install "SharePoint Add-in" only to use for SharePoint integration mode

8	SQL Server 20	16 CTP3.3 Setup			x
Feature Selection Select the Evaluation features to	o install.				
Product Key License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Setup Files Setup Role Feature Rules Instance Configuration Feature Rules Instance Configuration Server Configuration Database Engine Configuration Analysis Services Configuration Reporting Services Configuration Feature Configuration Rules Ready to Install Installation Progress Complete	Features: Database Engine Services G. SQL Server Replication GAdvanced Analytics Ear Guality Services PolyBase Query Services PolyBase Query Services Query Services Query Services Query Services Query Services Query Services Query	Attractions for Sea Extractions for Sea for External Data Point for SharePoint Proc mpatibility nts complete	Feature description: The configuration and operation instance feature of a SQL Server in isolated from other SQL Server in Server instances can operate side the same computer. Prerequisites for selected features Already installed: Windows PowerShell 2.0 Microsoft. NET Framework 3. Microsoft. NET Framework 3. Microsoft. NET Framework 3. Microsoft. NET Framework 3. Disk Space Requirements Drive C: 4304 MB required, 11433 available zoooft SQL Server/	of each hitance is trances. SQL -by-side on 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	
	Shared feature directory: Shared feature directory (x86):	C:\Program Files\Mic	vrosoft SQL Server\ /\Microsoft SQL Server\		
		< Back	Next > Cancel	Help	

CONFIGURE SSRS 2016

CONFIGURE WEB SERVICE URL

Once the require fields are filled, user needs to click on "Apply" button to configure Web Service

D) F	Reporting Services Configurat	ion Manager: NAUTILUSSQLBI\MSSQLSERVER	- • ×
SQL Server 2016 CTP3 Reporting Services Configuratio	n Manager		
Connect NAUTILUSSOLET/MSSOLSER/VER NAUTILUSSOLET/MSSOLSER/VER Service Account	Web Service URL	to access the Report Server. Click Advanced to define multiple URLs fo y additional parameters on the URL.	r a single Report Server
A Web Service URL	Report Server Web Service Wrtue Virtual Directory:	l Drectory ReportServer	
Database	Report Server Web Service Site in 3P Address:	dentification All Assigned (Recommended)	
🖄 E-mail Settings	TCP Port: SSL Certificate:	80 (Not Selected)	
Execution Account	SSL Port:		Advanced
R Encryption Keys	Report Server Web Service URLs URLs:	http://NAUTILUSSOLB1:80/ReportServer	
Scale-out Deployment			
Subscription Settings			
Power BI Integration	Results		
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0			Apply Bit

CONFIGURE DATABASE

In this section, Database Administrator needs to create or change Reporting Server Database name.

2	Reporting Services Configuration Manager: NAUTILUSSQLBI/MSSQLSERVER
SQL Server 2016 CTP3 Reporting Services Configurat	ion Manager
1 Connect	Report Server Database
1 NAUTELUSSQLEEWISSQLSERVER	
Service Account	Reporting Services stores all report server content and application data in a database. Use this page to create or change the report server database or update database connection credentials.
1 Web Service URL	Current Report Server Database
[] Database	Click Change database to select a different database or create a new database in native or SharePoint integrated mode.
Report Manager URL	SQL Server Name: Database Name: Benor Mode:
🚖 E-mail Settings	Change Database
Execution Account	Current Report Server Database Credential The following credentials are used by the report server to connect to the report server database. Use the options below to choose a
📯 Encryption Keys	different account or update a password.
stale-out Deployment	Login: Pastword:
🗓 Subscription Settings	Change Gredentials
Power 82 Integration	Results
	Сору
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Here Database Administrator can write Database name, by clicking next, two new databases will be created.

- 1. ReportServer
- 2. ReportServerTempDB

	Report Server Database Config	guration Wizard	×
Change Database Choose whether to create or co	nfigure a report server database.		
Action	Enter a database name, select the langua	ge to use for running SQL scripts, and specify	
Database Server	whether to create the database in native of	or SharePoint mode.	
Database			
Credentials	Database Name:	ReportServerNative	
Summary	Temp Database Name:	ReportServerNativeTemp	
Progress and Finish	Language:	English (United States)	×
	Report Server Mode:	Native	
0		Previous Next Cano	el

HOW TO USE SSRS 2016/17 TO REPORT ON SHAREPOINT 2016 DATA

In this section, we will demonstrate how to use SharePoint List data as Data Source in SSRS 2017 and create paginated report and deployed on Reporting Server.

CREATE PAGINATED REPORT USING SHAREPOINT LIST DATA AS DATA SOURCE

Below are the steps which give you information about how to use SharePoint Data as a Source and create Paginated Report.

CONNECT TO REPORT SERVER

Go to the Report Server Url and click on +(Add) sign and choose Paginated Report, it will open Report builder.

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	Ľ					Ac Go Win	Cancel tivate Windo to Action Cente ndows.

NEW REPORT & DATASET

Once Report builder open, the user needs to create Report & Dataset, here we have selected **Chart Wizard**.

		New Report or Dataset	x
	New Report Display data from various data sources in tables, charts, and other formats.	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	
		Activate Wir	ndov

CHOOSE DATASET

After selecting Chart type (in our case it is **Chart Wizard**), the user will redirect to **Choose Dataset** screen. Here we have Selected **Create a Dataset** option.

	New Chart	x
Choose a dataset		
Choose a dataset		
Choose an existing dataset in this report or a shared	i dataset	
Browse		
Create a dataset		
Help	< Back Next >Val C V Cancel	ovvs

CREATE DATA SOURCE

Once you selected "Create a Dataset", you will be redirected to "Create Data Source" screen.

Here, you can give "Name of the Data source", "Select connection type" and Connection string.

The user needs to choose "Microsoft SharePoint List" in a Select Connection Type option in order to establish the connection between SharePoint & SSRS and to fetch data from SharePoint List.

The user needs to enter "Site Name" in a Connection String Textbox, to establish particular SharePoint site connection to SharePoint.

connection to a da	Data Source Properties	
		X
Canaral		
Credentials	Change name, type, and connection options.	
	Name: DataSource1	
	 Use a shared connection or report model Use a connection embedded in my report 	
	Select connection type:	
	Connection string:	
	http://win-33aloe0m8f5/sites/Imbibe	Build
	Use single transaction when processing the queries	Test Connection
Help		OK Cancel
	Credentials	Credentials Credentials Name: DataSource1 Use a shared connection or report model Image: Use a connection embedded in my report Select connection type: Microsoft SharePoint List Connection string: http://win-33aloe0m8f5/sites/Imbibe Use single transaction when processing the queries Help

Specify Credential in Data Source Properties

Here, we have selected "**Use Current Windows user. Kerberos delegation might be required**" option, as we are using Windows Authentication and the current user has administrator privileges in SharePoint and SQL.

	New Chart	x
Choose a	a connection to a data source	
hoose	Data Source Properties	×
Data	General Credentials Change the credentials used to connect to the data source.	
	This information is only stored when you save the report to a report server.	
	Use current Windows user. Kerberos delegation might be required. Use this user name and password	
	User name:	
	Password:	
	Impersonate the authenticated user after connecting	
	Prompt for credentials Enter prompt text:	
	Use as Windows credentials Do not use credentials	
В		onnection
	Help OK Cancel	
		ate Wandows
	Go to /	Action Center to a
	New Chart	x
oose	e a connection to a data source	
oose a	a published data source, or create a connection for use only in this report.	
ata S	Source Connections:	
	DataSource1	
	(in this keport)	
	Test Connection Result	
	Connection created successfully.	
	OK	
Bro	rowse Edit 1	est Connection
		ate Wandows
	< back //wext>v	and cancero yes

DESIGN QUERY & SELECT LIST

Once connection establishes successfully, when users click on **Next**, then they will redirect to "**Design a Query**" Screen.

Here the user can choose **particular SharePoint List** and its fields, also user can apply additional filters, here we have selected "**UserList**" list.

	New Chart	x
Design a query Build a query to specify the data you want from the	data source. n Fields]>> Run Query Selected fields X + + +	*
Image: Composed Looks ∧ Image: Content type publishing error log Image: Converted Forms Image: Converted Forms Image: Converted Form Templates Image: Converted Forms Image: Converted Form Templates Image: Converted Forms Image: Converted Form Templates Image: Converted Forms Image: Converted Forms Image: Converted Forms Image: Converted F	Field Title UserName Email BirthDay Role ID Contant Time Applied filters *? × ★ * Field name Operator	<pre></pre>
Query re <u>s</u> ults		×
Help	< Back Next >Val e Veah	elovvs vter to s

SELECT CHART TYPE

Once users click "**Next**" from "**Design a Query**" screen, they will redirect to "**Choose a Chart Type**" screen.

Here users can select any chart types from available default chart type. We have selected **column Chart** type.


ARRANGE CHART FIELDS

Once users have selected particular chart type, they will redirect to "**Arrange Chart Fields**" from here users can select any field to configure into **Categories**, **Series**, and **values** column based on their requirement.

New Chart	
Arrange chart fields Add data fields to the chart. For most chart types, a field in the Categories list is dispaggregated data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data on the y-axis. A field in the Series list creates a new series in the chartile data data on the y-axis. A field data data data data data data data da	Dayed on the x-axis. A field in the Values list shows Image: Series UserName Σ Values

PREVIEW

Once finished with "Arranging chart field", users will redirect to preview section.

Preview	the report item being created. You can customize the fonts, color schemes and style after you finish the wizard.	
[Chart Title	
	User Name A User Name B	
	80	
	60	
	40	
	0 Role A Role B Role C Role D Role E Role F	
'		



Once finish, users will able to see chart design in Report Builder

RUN THE REPORT



CHECK THE REPORT IN REPORT SERVER URL

Users also able to see the report in "Report Server URL" and run the same.

Page | 40

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PAGINATED REPORTS (1)								
report1								
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INTEGRATING THE SSRS REPORT WITH SHAREPOINT 2016

Native mode comes with a pair of web parts that allow SSRS web parts to embedded into a SharePoint page.

Administrator can find **RSWebparts.cab** file for web parts from "C:\Program Files (x86) \Microsoft SQL Server\130\Tools\Reporting Services\SharePoint"

Copy this file from SQL to SharePoint farm and install the same

Install-SPWebPartPack -LiteralPath "H:\Himanshu\RSWebParts.cab" -GlobalInstall

USE OF THE REPORT VIEWER WEB PART

Once both web parts are installed "Report Viewer" and "Report Browser" will display under the miscellaneous section while new web part is added.

Report browser used to display the report in Server.

Report viewer used to render those report.

Configuration	1								
Report Manager	r URL								
http://NAUTILU	JSSQLBI/I	reports							
Report Path									
/Groups By Me	ssages								
Toolbar Size Full									
Appearance									
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+ Layout									
Advanced									
OK Cancel Apply									

USE SQLIST TO SYNCH SHAREPOINT DATA TO SQL SERVER AND REPORT USING SSRS2016/2017

USE SQLIST TO EXPORT SHAREPOINT DATA INTO SQL

First of all, we are assuming you have installed license version of SQList on your computer.

Please follow below instruction to Export SharePoint data into SQL.

CHOOSE A SHAREPOINT SITE FOR EXPORT.

You need to write Site Name, Table Prefix, Site URL, Authentication mode, Username and Password to establish the connection between SQList to SharePoint Portal.

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$\leftrightarrow \rightarrow c$		-	Create a new replication	×	☆ :
, Searc	Start Replicat	Choose a SharePo	Dint site to export ew one by entering the SharePoint site and authentication details. You will be able to choose which sub-sites and lists to export later in the wizard.		arot 💽
Home	Curi Edi	Choose a SharePoint site to export Choose a destination database	Create a new site definition Select an existing site definition	Delete	Share
Noteb Docum		Choose export type Select lists/sites to export	Site Name Table prefix Imbibe Imbibe		bin (0)
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🖉 Edit			10 ♀ What is this?		
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CHOOSE A DESTINATION SERVER

This section enables us to establish database connection which the SharePoint site will be exported.

You need to write SQL server name with an instance, Database Name, Database Engine, Authentication mode, Username and Password to establish SQL test connection.

1			Microsoft SQL Server Management Studio	- 🗆 🗡
File Edit Vi	iaw Dah	2	Create a new replication – 🗖 🗡	× 1
Object Explo Connect *	Start Replicat	Choose a destinat	ion database eate a new one by entering the database connection details. This is the database into which the SharePoint lists will be exported.	
	Cun Edi	Choose a SharePoint ste to export Choose a destination database Choose export type Select lats runnes Complete	Create a new database connection Server Name\Instance SK-PC-SQLEXPRESS Database Name Work Database engine SGL Server 2014 Omain Image: Connection to the database was successful	Delete
<		raving uniculties? Chat with us!		
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CHOOSE EXPORT TYPE

In this section, you need to choose an export type, you can choose Export List and library from this site only.

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FILE		1	4	Create a new replication – 🗖 🗙	×	Sign i	n P
*	Star	rt	Choose export typ	e		d +	
Paste F Clipb	Replic	a	Choose whether to export only lists from the si the next step in the wizard.	te definition you chose at the previous step, or to export lists from that site as well as its sub-sites. If you chose the latter, you will be able to choose which sub-sites to export at		ect *	~
Naviga	Cu	iri di	Choose a SharePoint site to export	Chose the export type for the replication:	Delete	-	
Search doc			Choose a destination database	Imbibe thtps://mujarataas.sharepoint.com/sites/mbbesharepoint			
HEADINGS			Select lists/sites to export				
⊳ c			*Select lists names	Export lists and libraries from this site only If you choose this option, SQList will export only lists belonging directly to this site. You will be able to select which lists to rest with when the work the set of the			
Use			Complete	export at the next step in the wizard.			
▲ Use SQ ▲ Use				C Export from this site and its sub-sites			
C C				If you choose this option, SQList will export lists belonging to this site as well as its sub-ates (you can choose how many levels deep you wish SQList to go). You will be able to select which sub-ates to export a tithe next step in the wizard.			
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SELECT WHICH LIST TO EXPORT

In this section, you can select Particular list or library which you want to export from SharePoint to SQL.

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FILE		4	Ci	reate a new r	eplication				- 🗆 🗙		Sign in 🔍		
Parte X (Start	Select which lists to export											
Clipb	Replica	Select the lats and libraries you wish to export by selecting "Export List". To export document/image's binary content from document or image libraries, select "Export binary data". To export the attachemits of a list that has them enabled, select "Export attachemits". You can choose a default behaviour and override individual lats where neccessary.											
Naviga	Curi Edi	Choose a SharePoint site to export	Choose a SharePoint site to export By default Delete										
Search doc		Choose a destination database	Export only the lists and libraries selected below		V Diridiy	content Attac	b	inary content	items				
HEADINGS		Choose export type	Unly the lists and libraries selected below will be	exported. New li	ts added to the site i	n the future will not be	exported.						
Þ.c		Select lists/sites to export											
Inter		*Select lists names	List name	tem count	Export List	Export binary content	Export attachments	Attach. binary content	Keep deleted ^ items				
Use		Complete	ImbibeDocumentLibraryTwo	18									
▲ Use SQ			List Template Gallery	3									
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PAGE 48 OF 85	5521 V	/ords [] ²						Ū.	I E R		— + 100%		
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DONE

This section confirms that all your changes have been completed, post-finish SQList service will be started.

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Naviga Search doc HEADINGS D C Inter Use Use C C C S S Use S C S C C C C C C C C C C C C C C C C	E		Choose a SharePoint site to export Choose a destination database Choose export type Select lists/sites to export "Select lists names Complete	You have completed this wizard, click "Next" to save your changes and close this window. The SQList service will be started after the changes are saved (if it is currently running, it will be stopped). If you do not want the service to be started, un-tick the checkbox below. You do not need to keep SQList Manager open for SQList to keep the data in the SQL tables being updated as the SQList Service will keep running once the SQList Manager is closed. If you click "Cancel", the windows will close without saving your changes.	Delete	
4	Yo		Revealing difficulties? Chat with us!	Start the SQList service after saving the profile < Back Frieh Cancel Hep		
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SQLIST SERVICE IS RUNNING

This screen will be display post finish on the last screen, you need to click on **refresh** to check logs of events.



This section displays all details logs of export SharePoint data into SQL.



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	10	Chainring Nut	321	CN-6137	FALSE	0	Silver	1000	750	0	0		
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		_										0 00	

This SQL table display all your data successfully exported from SharePoint site to SQL Table.

Now since data is exported into SQL, we shall use this data as Data source in SSRS and create Report

USE EXPORTED SQL DATA AS DATA SOURCE IN SSRS AND CREATE REPORTS.

This section indicates how to use SQL Data as a data source and create SSRS Reports.

CONFIGURE REPORTING SERVICE USING REPORT SERVER CONFIGURATION MANAGER

In order to host SSRS reports, Administrator needs to configure Reporting Service in the server where reporting service instance is installed.

Below are steps to properly configure Reporting Service on the server.

REPORT SERVER CONFIGURATION CONNECTION

When user open Reporting Service Configuration Manager, he/she will redirect to "**Reporting Service** Configuration Connection" screen.

In this Server name and Report Server Instance name populated automatically, users need to connect the same to establish the connection.

	Report Server Configuration Man	ager	- 🗆 ×	? 🗹 — 🗗 🗙 Sign in 🚺
A Cut Copy Paste Copy Paste J	Report Server Configur	ation Manager		AaBbCcDc Heading 6
	P Connect			k∂ Select →
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	I Web Service URL	The Report Server Configuration Connection		
	Database	Report Server Connection		
	Web Portal URL	Please specify a server name, click the Find button, and select a report server instance to configure.		
	🚖 E-mail Settings	Server Name: DESKTOP-U#R8DCA Find		
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SERVICE ACCOUNT

Once connected, the user will be redirected to Service Account Screen, in which User has rights to choose "Built-in Accounts" or any accounts with relevant authorization, a user will **Sysadmin** right will work.

After writing relevant credential, the user needs to click "Apply" button, to authenticate.



Web Service URL

This screen will help users to configure Web Service URL for Reporting Service. Default values will be autopopulated for each field, the user can update the same if required, after confirming all correct values, User needs to click "**Apply**" button to enable **Web Service URL**.

Note: If user faces any error while clicking on this URL, Kindly check reporting Database status.

	P		Report Server Configuration Manager	DESKTOP-UAR8DCA\SSRS – 🗆 X
Home	Mozilla Firefox	SSRS 201	Report Server Configuration	on Manager
This PC	Opera Browser	vihu	먚 Connect	Web Service URL
Network	PowerISO	1_ 5181751	DESKTOP-U4R8DCA\SSRS	Configure a URL used to access the Report Server. Click Advanced to define multiple URLs for a single Report Server instance, or to specify additional parameters on the URL.
Recycle Bin	Quick Heal Safe Banking	1GB of	과 Web Service URL	Report Server web Service Virtual Directory Virtual Directory: ReportServer Web Service Site identification Paddress: Address: Ad
Control Panel	Quick Heal Secure Br	blog ssr	Web Portal URL E-mail Settings E-mail Settings	TCP Port: 80 HTTPS Certificate: (Not Selected) HTTPS Port: Advanced
Acronis True Image 2014	Rapid YouTube	EDITED NI SSRS BLC	Recryption Keys	Report Server Web Service URLs URLs: URLs: http://DESkTOP-IJ4R8DCA:80/ReportServer
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ldea Smart Wi-Fi	Winamp	Orbit		Capy Apply Exit
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The User clicks the URL to given screenshot:-



DATABASE

The user can create or change Reporting Server Database from this screen, if a user configures reporting service for the first time, he/she needs to click on "**Change Database**" button and create Reporting Server Databases.

Two databases will be created after this configuration.

- 3. ReportServer
- 4. ReportServerTempDB

Once all process has been done, press "Apply" button.

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-			A Web Service URL	Current Report Server Database
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LIST OF DATABASES

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REPORT MANAGER URL

The user needs to click "Apply" button to enable default "Report Manager URL". Once its enable then user can able to click URL and will redirect to Report Manager URL

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Report Server Manager Screen.

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CREATE SSRS REPORT USING REPORT BUILDER

Once SSRS Service properly configures, now it's time to use Exported data and create Chart using Report Builder.

CHOOSE PROJECT TYPES:

The developer can select any particular service Types to build SSRS Reports.

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ADD AND CONFIGURATION DATA SOURCE AND CONFIGURATION

Once the SSRS Configuration completed, A Developer needs to add the data source to the reports. It can be done using "NEW/ Data Source" property of Shared Data Sources.

In this screen, a user can write "Name of the Data Source", select "Type" and Configure "Connection Strings".

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	③ Your organization must have specific security infrastructure in place for this option to work. Learn more					
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ADD DATA SET

The Developer creates Dataset using the Report Builder. It can be done using "NEW/ Data Set" to create and add dataset.

The developer needs to Data Source to create a dataset.

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HOW TO ADD DATA SOURCE TO CREATE NEW DATA SET:-

Above the Screenshot, a click link "Browser other data sources" to add the Data source.

After the click link, the new page will be open, a new page screenshot given be below.

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After the choose Data Source, the developer press an "**Open**" your data source is added.

After click open, the below screenshot view your added data source.

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QUERY DESIGNER

The user can configure Query using Query Designer which will be used in Dataset.

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ADD REPORTS

Once Dataset is ready, User can create the report using Dataset.

They are mainly two types of Report:-

- 1. Paginated Report
- 2. Mobile Report

HOW TO CREATE PAGINATED REPORT:-

A data set will be created completely after a developer starts to create a paginated report.

The developer uses Report Builder to create a Report. A developer chooses the Paginated Report to create the below page opened.

REPORT WIZARD

This is the very first screen after adding a new report, this screen information about how to configure Reports using Report Wizard.

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CHOOSE DATA SET

This screen is display information about Shared Dataset, the user can select any shared dataset or can create the new data set one based on requirement.



CHOOSE CHART TYPE:-

Here, the developer can choose a chart type, which displays your data.

They are mainly five type of chart type:-

- 1. Column
- 2. Bar
- 3. Line
- 4. **Pie**
- 5. **Area**



DESIGN THE TABLE

From this screen, User can decide, how the report will be generated, where the user has all the fields from Query and configures those fields in Pages if grouping functionality is required then the user can configure particular field into Groups sections.

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COMPLETE THE WIZARD

After completing the design of table and press "**Next**", the user can give the name of the reports and click "**Finish**" to complete report building procedure.

After click "Finish" the developer are also change font, schema, color, and style.

NOTE: - the developer saves the report in this section.



PAGINATED REPORT OUTPUT

Once finish, Report will be generated and the user can run the report also see the preview of this report from "**Preview**" section in SQL server reporting service.



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HOW TO CREATE MOBILE REPORT:-

A Report Builder is also used to create a "Mobile Report".

The developer also chooses the "NEW/Mobile Report" to create the Mobile Report.

After they choose the Mobile Report, the below page is displayed.

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After the page Opened, The developer is select any type of Navigator, Gauges, like a developer

Drag and drop the item in given Block. The below page has displayed the navigator and gauges.

The Developer has also changed the report name.

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REPORT DATA

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Import the data into the dataset. Below page display Mobile report data.

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	6	1/1/2012 12:00:00 AM	Category A	Item B2	14,133.00	5,886.83	12,370.40	9,536.18
	7	1/1/2012 12:00:00 AM	Category A	Item B3	5,653.20	2,042.10	3,907.87	3,593.51
	8	1/1/2012 12:00:00 AM	Category A	Item B4	2,826.60	1,299.39	2,584.27	1,520.22
	9	1/1/2012 12:00:00 AM	Category A	Item C1	8,479.80	3,183.46	6,305.93	4,543.34
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MOBILE REPORT OUTPUT:-

In this section, the developer click the "**Preview**" to see the Mobile Report.
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NOTE: - Save the Report in this section.

After, saving the report the Report is run on Reporting Service.



PUBLISHED SSRS REPORT IN NATIVE MODE

Once Report is built, now it's time to deploy the report to the Report server and configure permission so every user in the organization can review the reports from Report Server.

REPORT MANAGER PAGE AFTER AND PUBLISH REPORTS.

User needs to Save the report in Report Server, once user publish the Reports, Report Manager will be looked like this.

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LIST OF REPORTS

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javascript:void(0);

RUN THE REPORT ON REPORT SERVER

The user can run any report from "Report List" in Report Manager.

PAGINATED REPORT RUN ON REPORT SERVER:-



MOBILE REPORT RUN ON REPORT SERVER:-



SETTING THE PERMISSION IN REPORT MANAGER

Report Manager provides facility to manage permission of any folders, Datasets, Data Source and reports.

Follow the procedure to manage permission in Report Manager.

User clicks on "Manage Folder" from Report Manager Page.

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MOBILE REPORTS (2)	
New Mobile Report Test Mobile Report	
PAGINATED REPORTS (3)	
1st Pagnated Report 2nd Report Test Report	
DATASETS (2)	
Dataset	
DATA SOURCES (2)	
MainDataSource TestSource	



Once click on Manage Folder option, below page will be displayed where user can select "Security"

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This is by default security group, the user can click on "Edit " option to edit the permission.

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Edit Role Assig	gnment				
Home > Manage > Securi	ity > Edit Role				
	Use this page to determine which t Select one or more roles to assign t	asks BUILTIN\Administrators can perform on Home. You can assign BUILTIN\Administrators to more than one role if you want to expand th o the group or user.	e task list.		
	Role ^	Description			
	Browser	May view folders, reports and subscribe to reports.			
	Content Manager	May manage content in the Report Server. This includes folders, reports and resources.			
	My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folder.			
	Publisher	May publish reports and linked reports to the Report Server.			
	Report Builder	May view report definitions.			
	Apply Cancel				
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The user can write Group name and Username and select particular types of roles.

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Home > Manage > Secur	ity > New Role					
	Use this name to define role-based	security for Home				
	Group or user: Test					
	Select one or more roles to assign t	to the group or user.				
		Description				
	Browser	May view folders, reports and subscribe to reports.				
	Content Manager	May manage content in the Report Server. This includes folders, reports and resources.				
	My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folder.				
	Publisher	May publish reports and linked reports to the Report Server.				
	Report Builder	May view report definitions.				
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