iSupport's SQL Reporting functionality is installed via the iSupport SQL Reporting Setup Wizard; it includes several report models with iSupport database fields, tables, and relationships. iSupport includes some default SQL reports, and if you have a version of Microsoft SQL Server 2012 other than Express Edition and applicable permissions you can customize report parameters or create new reports. See <u>Customizing Report Parameters on page 10</u> for information on customizing iSupport's SQL reports.

If you have iSupport's View SSRS Reports permission, you can view SQL reports via the SSRS Report Viewer dashboard

component or the SSRS Reports dashboard (accessed via the SSRS Reports option on the Desktop Content **a** menu). If you have the Create SSRS Reports permission, you can use iSupport's report models to create ad hoc reports via Microsoft Report Builder or custom reports via Microsoft Report Designer. The New Report option is included on the SSRS Reports dashboard.

Access to SQL-based iSupport reports and report folders can be restricted via group access permissions; if the Manage Group Access for SSRS Reports permission is enabled in your Support Representative Profile record, the Group Access service is in the folders and reports for managing group access.

Note: Due to a limitation in Microsoft's RSClientPrint control, iSupport's SQL Report Viewer functionality is only supported with Microsoft® Internet Explorer<sup>®</sup>. Mozilla<sup>®</sup> Firefox<sup>®</sup>, Google<sup>™</sup> Chrome, and Apple<sup>®</sup> Safari<sup>®</sup> can be used to view a report, but certain reporting features are not supported with those browsers.

This document outlines the steps for creating a report in Windows SQL Server 2012.



1. To get started, select SSRS Reports on the Desktop Content menu and then click the New Report button.

| Des  | ktop / | iSupport SSRS Reports  |                      |             |
|------|--------|--|----------------------|-------------|
| iSup | port S | SRS Reports  |                      | New Report  |
|      |        | Name 🔺   | Modified Date        | Description |
| 92   |        | Assets   | 6/27/2014 7:31:47 AM |             |
| 92   |        | Data Sources   | 6/27/2014 7:31:34 AM |             |
| 92   |        | Incidents  | 6/27/2014 7:31:45 AM |             |
| 92   |        | Inventory Scan Results                                       | 6/27/2014 7:31:47 AM |             |
| 92   |        | Surveys  | 6/27/2014 7:31:46 AM |             |
| 92   |        | Drillthru Incidents by Date Closed                           | 6/27/2014 7:31:37 AM |             |
| 92   |        | Drillthru Incidents by Date Created                          | 6/27/2014 7:31:37 AM |             |
| 92   |        | Drillthru Incidents by Escalation                            | 6/27/2014 7:31:38 AM |             |
| 92   |        | Drillthru Incidents by Priority                              | 6/27/2014 7:31:38 AM |             |
| 92   |        | Drillthru Open Incidents by Company                          | 6/27/2014 7:31:38 AM |             |
| 92   |        | Drillthru Open Incidents by Customer                         | 6/27/2014 7:31:38 AM |             |
| 92   |        | Drillthru Related Changes With Time Worked                   | 6/27/2014 7:31:39 AM |             |
| 92   |        | Drillthru Related Incidents With Time Worked                 | 6/27/2014 7:31:39 AM |             |
| 92   |        | Incident Velocity and Next Escalation                        | 6/27/2014 7:31:34 AM |             |
| 92   |        | Incident Velocity with Incident Priority and Next Escalation | 6/27/2014 7:31:38 AM | Chat (2) 4  |



#### 2. The following screen appears; select New Report.

| Getting Started                                 |   |   | X                        |
|---|---|---|--------------------------|
| New Rey<br>Display of<br>data sou<br>charts, ar | port<br>lata from various<br>rces in tables,<br>nd other formats. | a report from a wizard or from a blank report. Table or Matrix Wizard Guides you through choosing the data source connection, layou or matrix report. | t, and style for a table |
| New Da<br>Share qu<br>multiple                  | taset<br>eried data among<br>reports.                             | Chart Wizard<br>Guides you through creating column, line, pie, bar, and area cha  | rts.                     |
| Open a s  | aved report.  | Map Wizard<br>Displays report data against a geographical background.<br>Blank Report   |                          |
| Open a r  | ecently used report.  |   |                          |
| Don't show this dialo                           | g box at startup.   |   |                          |



3. In the New Table or Matrix dialog, select the option to create a new dataset.

| New Table or Matrix   |                  | X    |
|---|------------------|------|
| Choose a dataset  |                  |      |
|   |                  |      |
| Choose a dataset  |                  |      |
| Choose an existing dataset in this report or a shared dataset |                  |      |
|   |                  |      |
|   |                  |      |
|   |                  |      |
|   |                  |      |
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|   |                  |      |
|   |                  |      |
|   |                  |      |
|   |                  |      |
| Proven  |                  |      |
| browse  |                  |      |
| Oreate a dataset  |                  |      |
|   |                  |      |
| Help  | < Back Next > Ca | ncel |
|   |                  |      |



4. In the Select Data Source dialog, browse to the iSupport models available to you.

| New Table or Matrix  |
|--|
| Choose a connection to a data source   |
| Select Data Source   |
| Look n: <ul> <li>http://jbw2012s2012v12/reportserver/c.Support/Models</li> <li>Data Sources</li> <li>ArchivedIncidents</li> <li>Assets</li> <li>Changes</li> <li>Companies</li> <li>ConfigurationItems</li> <li>Correspondence</li> <li>Customers</li> <li>EventLog</li> <li>FrequentlyAskedQuestions</li> <li>Incidents</li> <li>KnowledgeEntries</li> <li>RuleGroups</li> <li>ServiceContracts</li> <li>ServiceContracts</li> <li>Surveys</li> </ul> |
| Name:     Open       Items of type:     Data Sources (*.rsds, *.smdl)  |
| Browse New Test Connection   |
| Help Cancel  |



In the following example, the iSupport Incident model has been selected as the Data Source connection.

| New Table or Matrix   | X                    |
|---|----------------------|
| 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:  |                      |
| Incidents http://ibw2012s2012v12/reportserver/c.Support/Models                      |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
|   |                      |
| Browse New  | Test Connection      |
|   |                      |
|   |                      |
| Help  | < Back Next > Cancel |



5. In the Design a Query screen, select the columns from the data set to be included in your report.

| New Table or Matrix                  |                  |           |             |              |             |             |             |                   |                  | X        |
|--------------------------------------|------------------|-----------|-------------|--------------|-------------|-------------|-------------|-------------------|------------------|----------|
| Design a query                       |                  |           |             |              |             |             |             |                   |                  |          |
| Build a query to specify the data ye | ou want from the | data so   | urce.       |              |             |             |             |                   |                  |          |
| 🤣 Edit as Text 😂 Import 📔            | 🤊 😋   🗜 🍸 Filt   | er        |             |              |             |             |             |                   |                  |          |
| Incidents                            |                  |           |             |              |             |             |             |                   |                  | <b>^</b> |
| Entities: 🔍 🗒                        |                  |           |             |              |             |             |             |                   |                  | ≡        |
| Support Representative               | Incident Count   | Inciden   | Priority    | Status Label | Status Type | Date Opened | Date Closed | Issue Description | Issue Resolution | So       |
| Incident                             | 0                | XXXXXXXXX | ,<br>xxxxxx | x0000000x    | x00000000x  | 1/1/2013    | 1/1/2013    | x00000000000x     | X00000000000X    | xx =     |
| E Assignee                           | •                | 111       |             |              |             |             |             |                   |                  | •        |
| Customer     Company                 |                  |           |             |              |             |             |             |                   |                  |          |
| < III >                              |                  |           |             |              |             |             |             |                   |                  |          |
|                                      | 1                |           |             |              |             |             |             |                   |                  | =        |
| Fields:                              | ]                |           |             |              |             |             |             |                   |                  | _        |
| a History Entry                      |                  |           |             |              |             |             |             |                   |                  |          |
| Date & Time                          |                  |           |             |              |             |             |             |                   |                  |          |
| # Day Created                        |                  |           |             |              |             |             |             |                   |                  |          |
| # Month Created<br># Quarter Created |                  |           |             |              |             |             |             |                   |                  |          |
| # Year Created                       |                  |           |             |              |             |             |             |                   |                  |          |
| # Time Worked                        |                  |           |             |              |             |             |             |                   |                  |          |
|                                      |                  |           |             |              |             |             |             |                   |                  |          |
|                                      |                  |           |             |              |             |             |             |                   |                  |          |
|                                      | •                |           |             |              |             |             |             |                   |                  | <u>*</u> |
|                                      |                  |           |             |              |             |             |             |                   |                  |          |
| Help                                 |                  |           |             |              |             |             | < Ba        | ack Next          | > Can            | icel     |



6. Add the columns to the report design area from the data set.

|  | Untitled - Microsoft SQL Server Report Builder   | _ = x                              |
|--|--|------------------------------------|
| Home Insert View   |  | 0                                  |
| Run Paste B Z U A A  | The set of the s |                                    |
| Report Data ×  | ····1···· <u>1</u> ···· <u>2</u> ···· <u>3</u> ···· <u>4</u> ···· <u>1</u> ···· <u>5</u> ····  | 6 1 7 1 8                          |
| New - Edit 🗙 🔹 🔻   |  |                                    |
| ⊕- 🔤 Built-in Fields<br>⊖- 🏱 Parameters  | Incidents by Status and Date   |                                    |
| Garage Status_Type   | Number Priority Status Label Date Date Closed Issue  | Source Assignee Ca                 |
| Data Sources   | [Number] [Priority] [Status_Label] [Date_Opened [Date_Closed] [Issue_D   | Descrip [Source] [Assignee_Last [C |
| GuincidentBasic     Guincident     Guincident |  | =                                  |
| Issue_Description  | [&Execution  | nTime]                             |
| Assignee_Last_Name   |  | :<br>•                             |
| - Category_Level_1   | 🗉 Row Groups 🗂 Column Groups   | •                                  |
| - E Customer_Last_Name<br>E Company_Name   | [ (Number) ▼<br>= (Details) ▼  |                                    |
| Current report server http://jbw2012s  | 2012v12/reportserver Disconnect  | № 100%                             |



7. Select Run to display the report.

|                      | Untitled - Microsoft SQL Server Report Builder _ 🗆 🛪 |                  |   |                   |  |              |                       |                     |                       |                   |  |
|----------------------|--|------------------|---|-------------------|--|--------------|-----------------------|---------------------|-----------------------|-------------------|--|
| Run                  |  |                  |   |                   |  |              |                       |                     |                       | 6                 |  |
| Design Zoom          | First Previous                                       | 1 of 1 Next Last | <ul> <li>Refresh</li> <li>Stop</li> <li>Back</li> </ul> | Print Pag<br>Setu | le Print Exp<br>Ip Layout -  | Document     | Map<br>s              | <b>#</b>            |                       |                   |  |
| Views Zoom           |  | Navigation       |   | Pri               | int Exp  | ort Options  | Find                  |                     |                       |                   |  |
| Status Type Ope      | n, Closed, Suspend                                   | <br>Status a     | ind Date  | 9                 |  |              |                       |                     |                       | View Report       |  |
| Number               | Priority   | Status Label     | Date<br>Opened  | Date Closed       | Issue<br>Description   | Source       | Assignee<br>Last Name | Category<br>Level 1 | Customer<br>Last Name | Company<br>Name   |  |
| ■ D3UB595<br>445     | Medium   | Open             | 3/29/2013<br>12:00:00 AM                                |                   | this is a new<br>test ticket for<br>reporting. How<br>does this look | Direct Entry | March                 | Change Tasks        | Garrity               |                   |  |
| D3UC571<br>218       | Medium   | Open             | 3/29/2013<br>12:00:00 AM                                |                   | Need a new<br>telephone line<br>run into the<br>generator<br>room.   | Direct Entry | March                 | Communicatio<br>ns  | Alder                 | Technology<br>PCS |  |
| 3/29/2013 3:41:18 PM |  |                  |   |                   |  |              |                       |                     |                       |                   |  |
|                      |  |                  |   |                   |  |              |                       |                     | -                     |                   |  |



8. When you save the new report, be sure to save it in the c.Support/Reports folder or a subfolder within the Reports folder. Do not save your report in the Models folder or it will not be accessible from iSupport.

|  | Untitled - Microsoft SQL Server Report Builder   | _ = ×                             |
|--|--|-----------------------------------|
| Home Insert  | : View   | Ø                                 |
| Home Insert  | Vew  Save As Report  Look in: http://jbw2012s2012v12/reportserver/c.Support/Reports/Incidents  Time Entries  Time Open Al Incidents - Incident Volume by Day by Hour Al Incidents by Category Al Incidents by Category Al Incidents by Company by Customer by Status Al Incidents by Company by Category Al Incidents by Department by Customer by Status Al Incidents by Rep Group by Rep by Status by Priority by Route Count Al Incidents by Rep Location by Category Testincidents I | Assignee C:<br>[Assignee_Last [C] |
| - E Date_Closed<br>- E Issue_Descript<br>- E Source<br>- E Assignee_Last<br>- E Category_Lev<br>- E Customer_Las<br>- E Company_Na | Computer       Name:     IncidentsbyStatusbyDatelrdl       Items of type:     Reports (*.rdl)  | Save<br>Cancel                    |
| b Current report server htt  | ttp://jbw2012s2012v12/reportserver_Disconnect  | 2 100% \ominus 🔍 🕀                |

You can save ad hoc reports to a report server folder if your Active Directory account is assigned a Publisher role with at least Manage Reports task enabled. See the Microsoft Report Server documentation for more information about report server security and role definitions. All iSupport-related reports are stored in c.Support/Reports folder on the report server.

#### **Customizing Report Parameters**

Several default reports are included in the c.Support/Reports folder; these reports contain non-hidden, non-internal parameters that you can change via Microsoft Report Manager. These changes will affect everyone viewing the reports and your Active Directory account must be allowed to make changes on the report server.

- 1. Determine the Report Manager URL for your report server; for example: http://<machinename>/reports or http://< machinename>/reports\_SQLEXPRESS (for Microsoft SQL Express 2008).
- 2. In Internet Explorer, enter the Report Manager URL. The following appears:

| Contents Propert   | Server Reporting Servic<br>10 | es            | <u>Home</u>      | Search for: | ns   <u>Site Settings</u>   <u>Help</u> |
|--------------------|-------------------------------|---------------|------------------|-------------|---|
| 🞬 New Folder       | 🍄 New Data Source             | 🔊 Upload File | 🔛 Report Builder |             | E Show Details                          |
| a <u>c.Support</u> |                               |               |                  |             |   |



3. Navigate to the **c.Support/Reports** folder and then click on **Show Details**. The reports appear as shown below:

| SQL Server Reporting Services<br>Home > c.Support ><br>Reports   | Home   My Subscriptions   Site Settings   Help<br>Search for:   |
|--|---|
| 🞬 New Folder 🛛 🏘 New Data Source 🔓 Upload File   | 🔛 Report Builder 🗮 Show Details   |
| Assets     Data Sources     Dillthru Incidents by Date Closed !NEW     Drillthru Incidents by Date Created !NEW     Drillthru Incidents by Escalation !NEW     Drillthru Incidents by Priority !NEW     Drillthru Open Incidents by Company !NEW     Drillthru Open Incidents by Customer !NEW     Drillthru Related Changes With Time Worked !NEW     Drillthru Related Incidents With Time Worked !NEW | <ul> <li>Incident Velocity and Next Escalation !New</li> <li>Incident Velocity with Incident Priority and Next Escalation !NEW</li> <li>Incidents</li> <li>Incidents</li> <li>Inventory Scan Results</li> <li>Open Incidents by Priority !NEW</li> <li>Open Incidents by Time Worked for Company and Customer !NEW</li> <li>Open Incidents by Top Companies and Customers !NEW</li> <li>Surveys</li> <li>Top Level Changes With Time Worked !NEW</li> </ul> |
|  | Top Level Incidents With Time Worked !NEW   |

4. Click on the Edit icon to the left of the report name and then click on the **Properties** tab. Click on the **Parameters** link on the left to display the report parameters as shown in the example below.

| SQL Server Reporting Services     Home   My Subscriptions   Site       Home > c.Support > Reports >     Search for:       Drillthru Incidents by Date Created     Search for: |                   |               |               |                           |       |        |             |              |  |
|---|-------------------|---------------|---------------|---------------------------|-------|--------|-------------|--------------|--|
| General   | Select the parame | ters that all | users can cha | nge, and choose a default | value | foreac | h.          |              |  |
| Parameters  | Parameter Name    | Data Type     | Has Default   | Default Value             | Null  | Hide   | Prompt User | Display Text |  |
| Data Sources  | StartDate         | DateTime      | <b>W</b>      | Override Default          | )     |        | V           | Start Date   |  |
| Execution   | EndDate           | DateTime      | 1             | Override Default          | )     |        | <b>V</b>    | End Date     |  |
| History   | ReportTitle       | String        |               | Incidents                 | ,     | 1      |             |              |  |
|   | Apply             |               |               |                           |       |        |             |              |  |

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