

Momentum

WEBINAR SERIES



ISM Mini Series 6 of 6 Ivanti Service Manager SSRS/BIDS

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WebEx Details

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- Use Chat if you have technical issues
- Use Q&A for questions throughout the duration of the webinar

Today's Speakers



Presenter:

Kevin Fenley | Senior Technical
Support Analyst

Moderators:

Wes McNabb | Professional Services Consultant
Stephanie Orange | Customer Success Manager

ISM Mini Series 6 of 6

Ivanti Service Manager SSRS/BIDS

May 22, 2018

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Agenda

- Requesting Access (for Cloud)
- BIDS Client Installation
- Understanding the Report Manager Role
- Downloading Report Templates
- Modifying an Existing Template
- Creating a New Template
- ERD Overview

Requesting Access (for Cloud)

To request access to the Staging-level database, log a case with Support (via success.ivant.com)

Provide the URL of your Cloud tenant, and Support will log a request for you.

Our Operations team will create your account, and Support will provide you with the login credentials and server address, instructions, and an archive of the 'Out of the Box' report templates.

The instructions and files can also be acquired from:
<https://community.ivant.com/docs/DOC-54895>

BIDS Client Installation

Creating and editing reports in the current version of Ivanti Service Manager requires the installation of:

Microsoft Visual Studio 2012

<https://www.visualstudio.com/vs/older-downloads/>

Microsoft SQL Server Data Tools - Business Intelligence for Visual Studio 2012

<https://www.microsoft.com/en-us/download/details.aspx?id=36843>

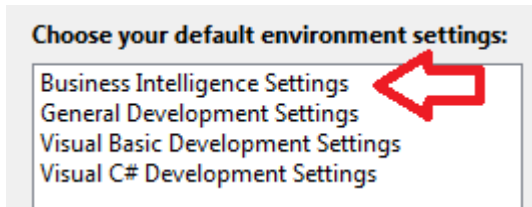
Both downloads are free from Microsoft.

Please note that the online help and the documentation provided by Operations are out of date and reference Visual Studio/SSRS 2008 R2 (which can still be used for reporting in On-Premise systems with older database servers).

BIDS Client Installation

Install Visual Studio 2012, and follow the prompts of the install wizard.

The only potentially difficult choice is on the 'Choose Default Environment Settings' screen; choose 'Business Intelligence Settings'.



Once Visual Studio is installed, proceed to install the Microsoft SQL Server Data Tools - Business Intelligence for Visual Studio 2012 plugin. The install wizard should walk you through the process.

BIDS Client Installation

The OOTB report archive (HEAT Reporting – BIDS.zip) also contains a .dll file that provides some custom functionality for existing and future reports ([more info here](#)).

Unzip the SSRSReportExtension.dll file to the Private Assemblies folder in the installation directory for Visual Studio 2012 (by default: C:\Program Files (x86)\Microsoft Visual Studio 11.0\Common7\IDE\PrivateAssemblies)

Unzip the rest of the report templates to a folder where you can find them again easily...

BIDS Client Installation

The easiest way to open BIDS is to double click the HeatReports.sln provided in the HEAT Reporting – BIDS.zip archive. You can also use File > Open > Project/Solution and browse to HeatReports.sln

To set up the database connection:

In the Solution Explorer pane (by default on the right side of the screen), double-click HeatReports > Shared Data Sources > SaaSAppModel.rds

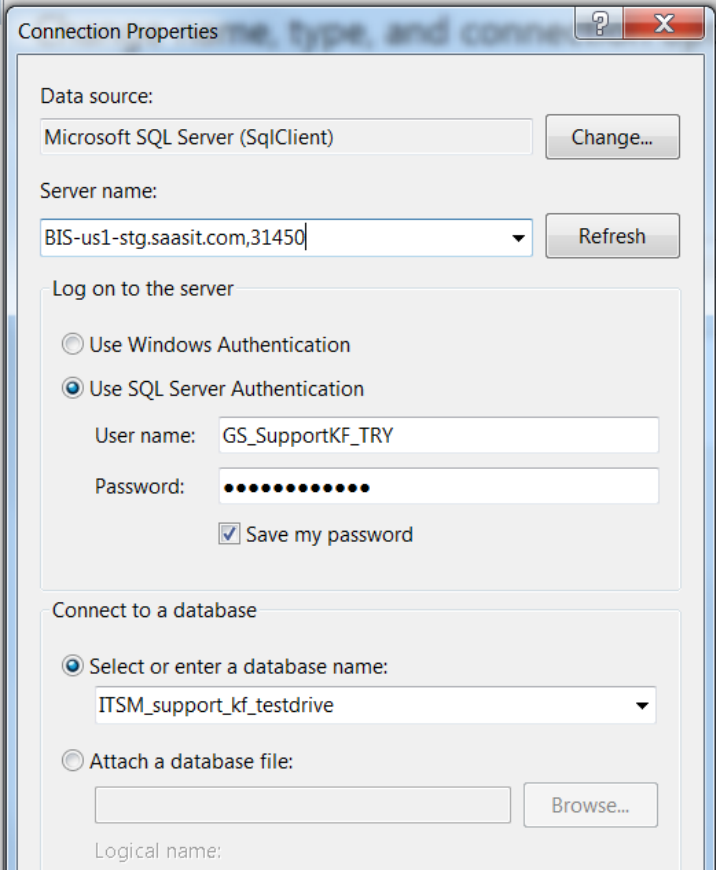
In the box that comes up, click the Edit button. Select 'Use SQL Server Authentication' and enter the server name and credentials that Ivanti provided. Your database should now appear in the dropdown in the 'Select a Database Name' section. Click OK twice to complete setup.

BIDS Client Installation

The connection page looks like this:

The server or DNS name will be provided by Operations, and will differ by location (for Premise users, this will be your reporting database).

The username and password provided will be entered here, and the database name at the bottom should appear automatically once the login credentials are entered.



The screenshot shows the 'Connection Properties' dialog box. The 'Data source' is set to 'Microsoft SQL Server (SqlClient)'. The 'Server name' is 'BIS-us1-stg.saasit.com,31450'. The 'Log on to the server' section has 'Use SQL Server Authentication' selected, with 'User name' 'GS_SupportKF_TRY' and a masked password. The 'Save my password' checkbox is checked. The 'Connect to a database' section has 'Select or enter a database name:' selected, with 'ITSM_support_kf_testdrive' in the dropdown. The 'Attach a database file:' option is unselected. The 'Logical name:' field is empty.

BIDS Client Installation

To open and edit a report template, you can just double click on it in the Solution Explorer.

If you want to open a report template that is not part of the default 'HEAT Reports' project file, right click on the Reports folder in the Solution Explorer and select Add > Existing Item. You can browse to any existing .rdl file and open it as part of this solution. (Note that it will show up at the very bottom of the list of templates in the Reports folder).

Understanding the Report Manager Role

The Report Manager Role is the only role that has access to the Report Templates via the application.

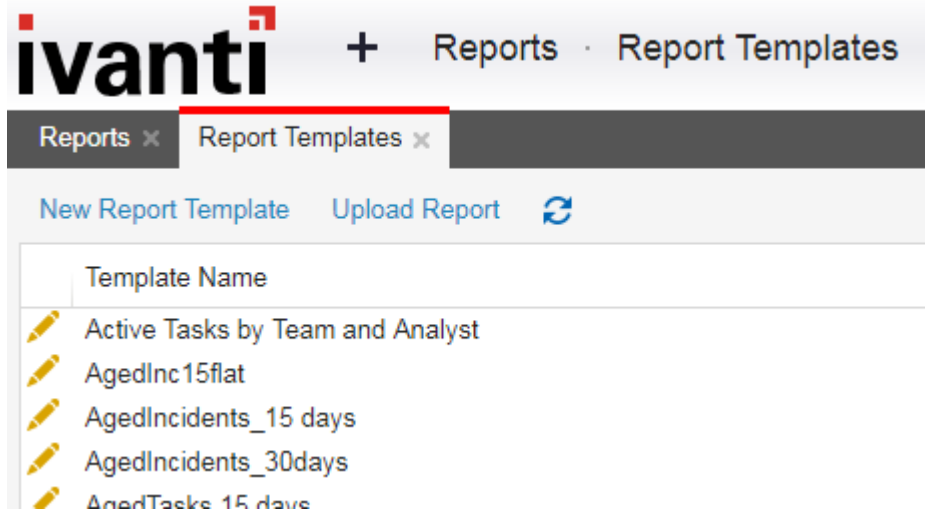
The role has access to 2 workspace, Reports and Report Templates.

The Reports workspace allows you to configure instances of a report based on a report template, which can be scheduled and distributed via email, or run manually via the application frontend by other roles. You can multiple reports that use the same report template (if you wanted to have different default parameters, or run on multiple schedules, for example).

Understanding the Report Manager Role

From the Report Templates workspace, you can download or upload report templates (as .rdl files).

Note that there are 'Edit' pencils next to each template, and a 'New Report Template' link at the top... for Cloud, these are non-functional.



Downloading Report Templates

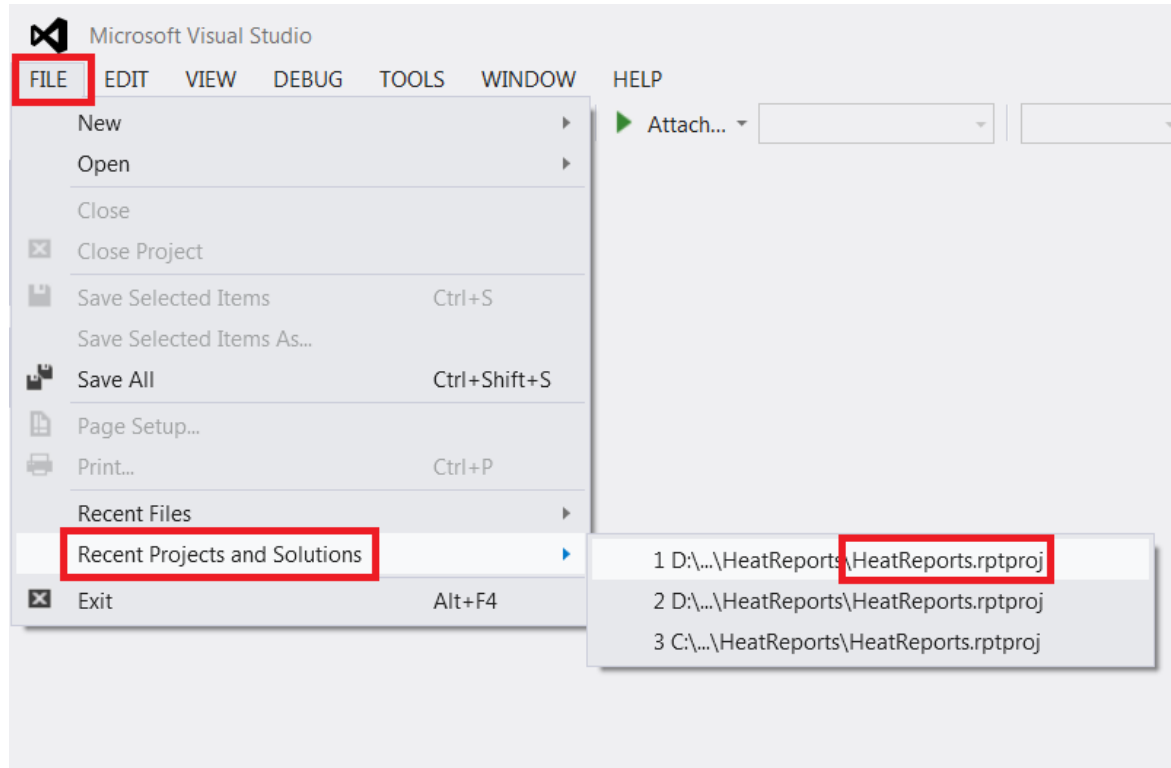
Using the Report Manager Role, navigate to the Report Templates workspace.

On the far right of the screen, there will be a green arrow download icon for each report template listed. This will allow you to download the .rdl file to your local computer.

As noted previously, if you want to open a report template in Visual Studio that is not part of the default 'HEAT Reports' project file, right click on the Reports folder in the Solution Explorer and select Add > Existing Item.

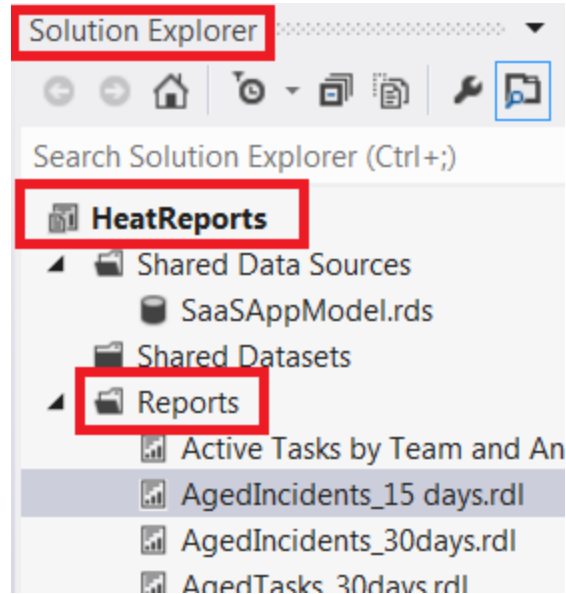
Modifying an Existing Template

Open Visual Studio, and open the HEAT Reports project:



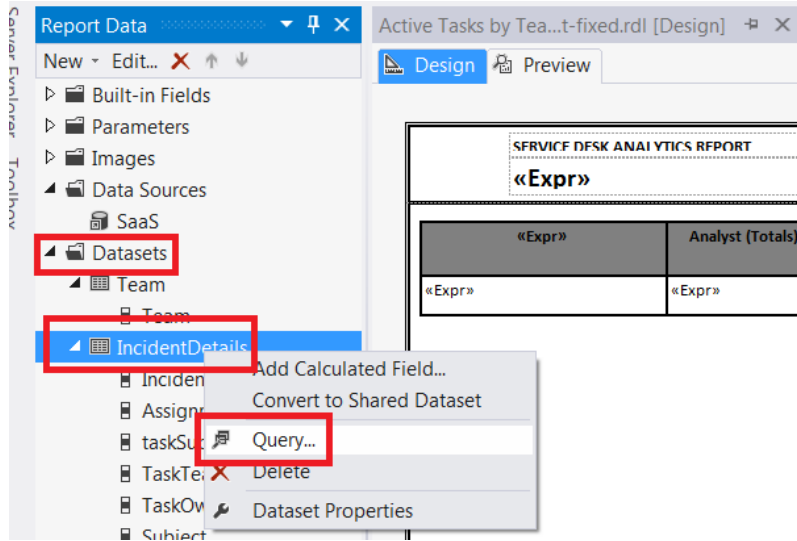
Modifying an Existing Template

In the Solution Explorer, expand the Reports folder, and double click on the report that you want to modify:



Modifying an Existing Template

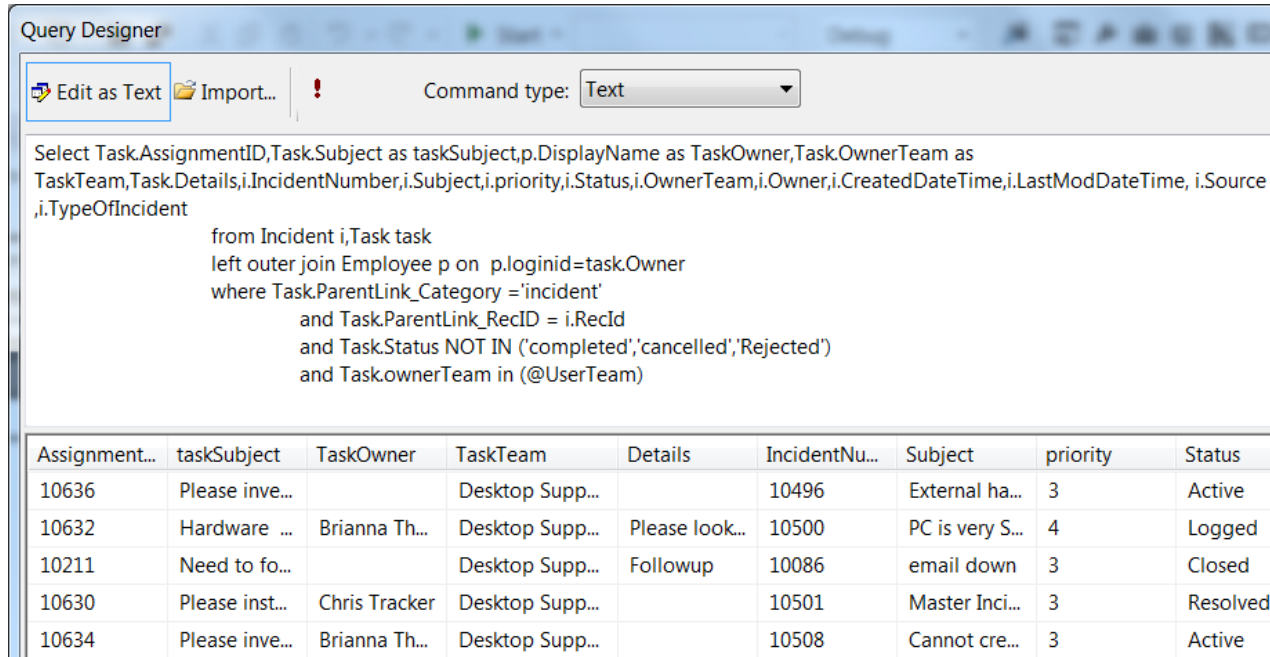
Once the report template is open, expand the Datasets folder, right click on the dataset you want to modify, and select the Query menu option:



There may be multiple Datasets, for parameters, individual charts or data regions.

Modifying an Existing Template

The Query Designer will pop up, and here you can modify the SQL used for the dataset, and run the query to see what data comes back:



The screenshot shows the 'Query Designer' window. At the top, there are buttons for 'Edit as Text' and 'Import...', and a 'Command type' dropdown menu set to 'Text'. Below this, the SQL query is displayed in a text area. The query selects various fields from the Incident and Task tables, joined with Employee information. The results are shown in a table below the query.

```
Select Task.AssignmentID,Task.Subject as taskSubject,p.DisplayName as TaskOwner,Task.OwnerTeam as TaskTeam,Task.Details,i.IncidentNumber,i.Subject,i.priority,i.Status,i.OwnerTeam,i.Owner,i.CreatedDateTime,i.LastModDateTime, i.Source ,i.TypeOfIncident
      from Incident i,Task task
      left outer join Employee p on p.loginid=task.Owner
      where Task.ParentLink_Category = 'incident'
            and Task.ParentLink_RecID = i.RecID
            and Task.Status NOT IN ('completed','cancelled','Rejected')
            and Task.ownerTeam in (@UserTeam)
```

Assignment...	taskSubject	TaskOwner	TaskTeam	Details	IncidentNu...	Subject	priority	Status
10636	Please inve...		Desktop Supp...		10496	External ha...	3	Active
10632	Hardware ...	Brianna Th...	Desktop Supp...	Please look...	10500	PC is very S...	4	Logged
10211	Need to fo...		Desktop Supp...	Followup	10086	email down	3	Closed
10630	Please inst...	Chris Tracker	Desktop Supp...		10501	Master Inci...	3	Resolved
10634	Please inve...	Brianna Th...	Desktop Supp...		10508	Cannot cre...	3	Active

Modifying an Existing Template

If for example you wanted to add the Priority of the Task to the report, you'd first add it to the underlying query here.

Note that below we've added the Priority field to the Select list, using the Task alias to specify the object/table.

```
Select Task.AssignmentID,Task.Subject as taskSubject,p.DisplayName as TaskOwner,Task.OwnerTeam as
TaskTeam,Task.Details.i.IncidentNumber,i.Subject,i.priority,i.Status,i.OwnerTeam,i.Owner,i.CreatedDateTime,i.LastModDateTime, i.Source
,i.TypeOfIncident task.Priority
    from Incident i,Task task
    left outer join Employee p on p.loginid=task.Owner
    where Task.ParentLink_Category ='incident'
           and Task.ParentLink_RecID = i.RecId
           and Task.Status NOT IN ('completed','cancelled','Rejected')
           and Task.ownerTeam in (@UserTeam)
```

Modifying an Existing Template

The new field should show up in the list under the Dataset name on the left, and can then be added to the report layout:

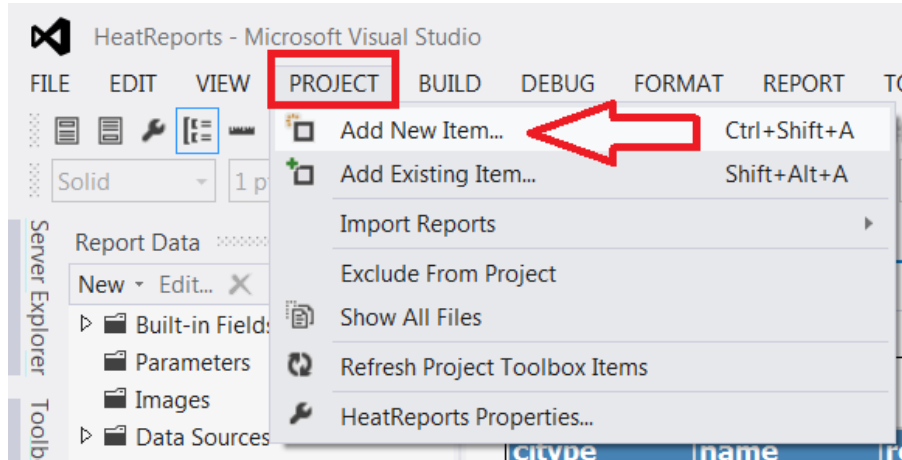
The screenshot shows a report editor interface. On the left is a tree view of datasets. The 'IncidentDetails' dataset is expanded, showing fields like 'IncidentNumber', 'AssignmentID', 'taskSubject', 'TaskTeam', 'TaskOwner', 'Subject', 'Details', 'priority', 'Status', 'OwnerTeam', 'Owner', 'CreatedDateTime', 'LastModDateTime', 'Source', 'TypeOfIncident', and 'Priority'. The 'Priority' field is highlighted with a red arrow. On the right is a report layout titled 'SERVICE DESK ANALYTICS REPORT'. It features a table with columns: 'Analyst (Totals)', 'Incident Number', 'Task ID', 'Task Subject', 'Incident Subject', 'Incident Priority', 'Incident Status', 'Incident Team', 'Incident Owner', 'Incident Created On', 'Incident Last Mod On', 'Incident Source', and 'Task Priority'. The 'Incident Source' column header is highlighted in red, and a red arrow points to it from the 'Priority' field in the dataset list. Below the table, red text reads: 'Drag the new column into the report display, and rename the column header as appropriate'.

«Expr»	Analyst (Totals)	Incident Number	Task ID	Task Subject	Incident Subject	Incident Priority	Incident Status	Incident Team	Incident Owner	Incident Created On	Incident Last Mod On	Incident Source	Task Priority
«Expr»	«Expr»	[IncidentN	[Assignme	[taskSubject]	[Subject]	[priority]	[Status]	[OwnerTeam	[Owner]	«Expr»	«Expr»	[Source]	[Priority]

Drag the new column into the report display, and rename the column header as appropriate

Creating a New Template

Select Project -> Add New Item



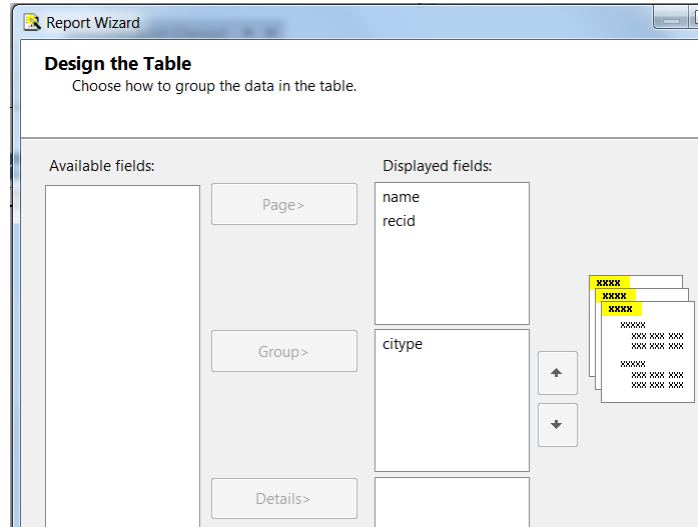
Select 'Report Wizard'

Select the SaasAppModel Shared Data Source

Enter the SQL query for your report (or for the main part of your report)

Creating a New Template

The Report Wizard will walk you through several layout-related steps (Tabular vs. Matrix, fields and groups, and display options)



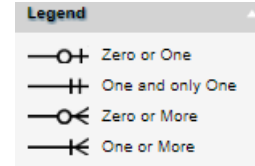
Once the wizard is complete, the report should be displayed like any other, and can be edited and added to, or saved and uploaded to the ISM application.

ERD Overview

In the Admin UI of the Service Manager application, each business object contains an ERD diagram mapping its connections to related objects.

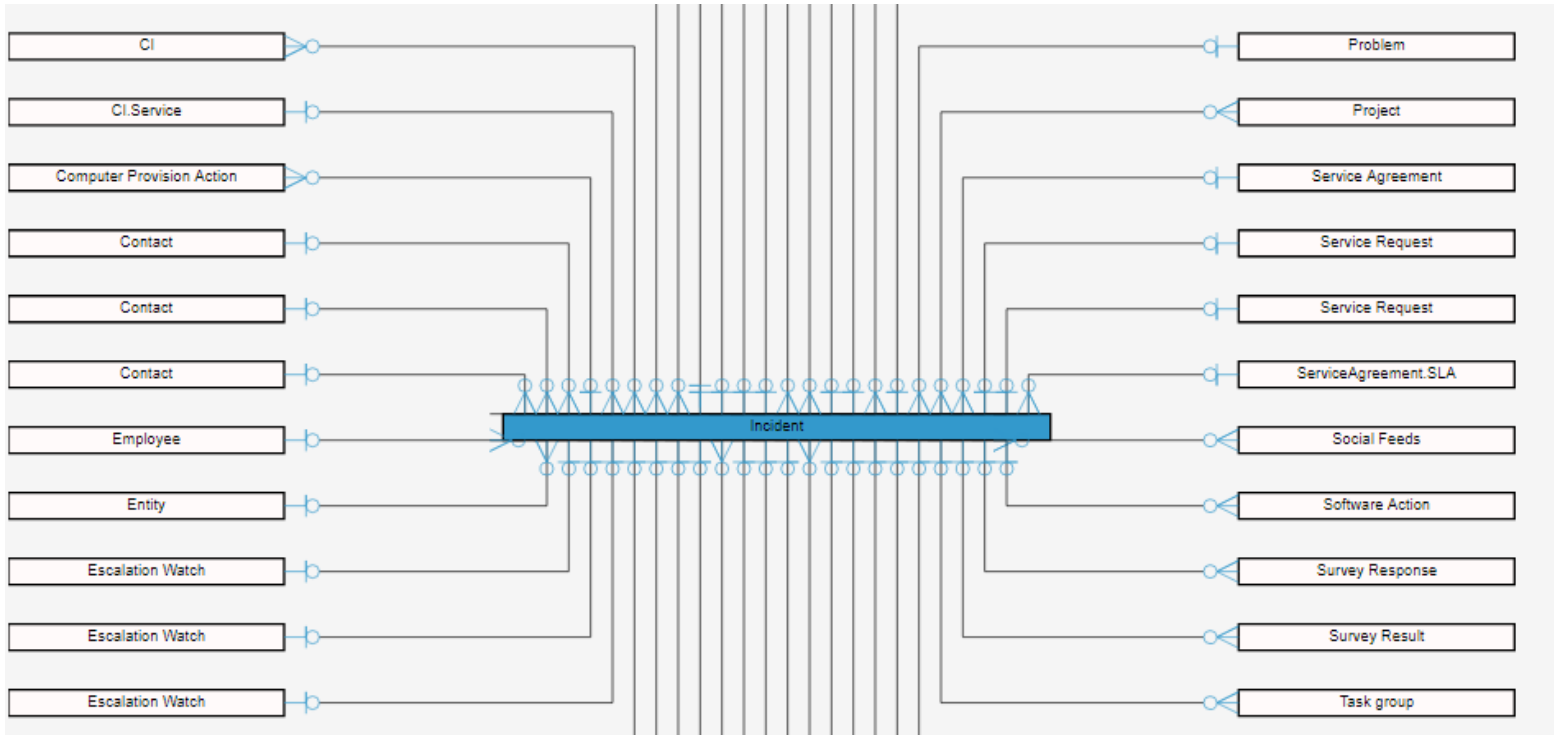
The ERD can be very beneficial even if the report developer is familiar with the Database structure of ISM. Relationships between objects (tables) can be discovered and ways to represent the data in a SQL View become apparent.

Using the legend you can see the relationships between tables at a glance.



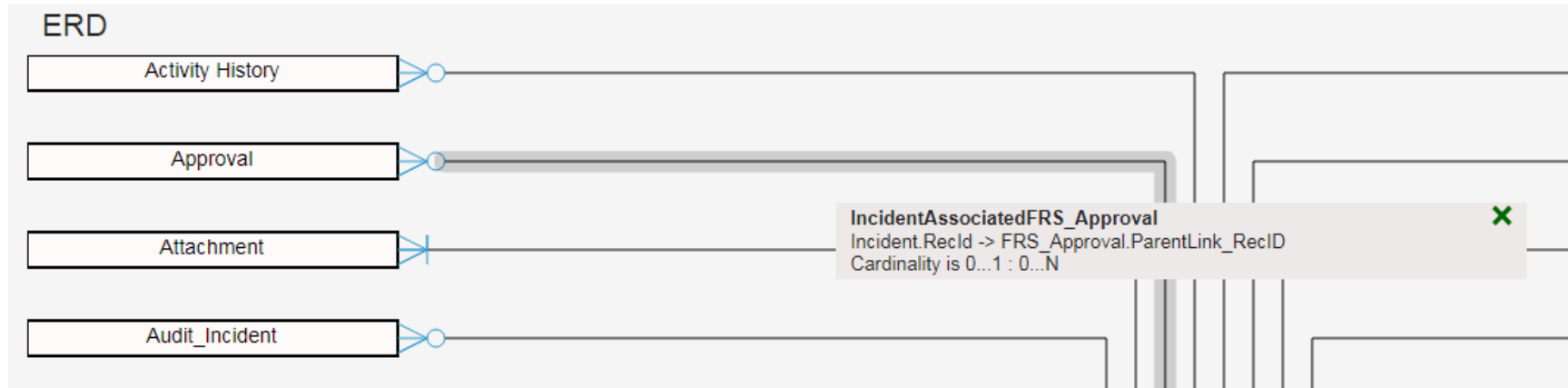
ERD Overview

For example, Incident has many relationships to other objects:



ERD Overview

Highlighting a connection displays a popup containing more detail about the relationship, including the exact name, cardinality, and key fields:



Q&A



Thank You

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