

Create External Report form Microsoft SSRS

This article details how to create an External Report that displays data from the MS SSRS server.

PREREQUISITES:

[Established connectivity to MS SSRS](#)

1. Add New External Report

Access **New > External Report > Microsoft SSRS**

The screenshot shows the 'New External Report' form with the following fields and values:

- 1** Name: Demo MS SSRS External Report
- Report Type: Microsoft SSRS
- Description: Demo MS SSRS External Report
- ☐ Apply Markdown to description (2500 character maximum)
- Dimensioned by: Not Dimensioned
- 2** Category: My Reports and Data
- Put in Folder: Select Folder
- Tags: Start typing to find or create Tags, then press the Enter key to save.
- 3** Image: ☒ Automatically Collected ☐ Manually Uploaded
- Report Image Trigger: Daily
- 4** Plugin Connection Profile: Microsoft SSRS - Demo SSRS Data Source
- 5** Report: ReportProducts
- 6** Next: Define Details

1. Provide a descriptive phrase in **Name**
2. Specify **Category** into which External Report will be placed
3. Define whether content has to be updated manually or automatically
 - For "Automatically Collected", specify a **Report Image Trigger**
4. Choose the MS SSRS **Plugin Connection Profile**
5. Select **Report** (Object) for External Report
6. **[Next: define details]**

2. Specify Report Details

External Reports / Demo MS SSRS External Report

Search

+ New... Content Admin Yevgeniya

Info Configuration Associations Advanced Documents Engagement History

Save Enable & Publish On Homepage

External Report Type

Report type: Microsoft SSRS

1 Show Report in: ☒ Viewer ☐ External Webpage

Show: ☒ In iframe ☐ As static image

Object Selection

Plugin Connection Profile: Microsoft SSRS - Demo SSRS Data Source

Report: /FolderRoot / SK_ReportProducts

There are no Filters defined. Click Manage Filters to add a Filter. 2 Manage Filters

Edit URL Test URL

Image Collection

Image: ☒ Automatically Collected ☐ Manually Uploaded

5 Report Image: ☒ Always collect all instances of external report ☐ On Demand: only when needed for distribution

Report Image Trigger: Daily

1. **Show Report in** defaults to "External Webpage".
 - For "Viewer", select **Show** "In iframe" or "As static image" option
 - **NOTE:** When opting to display the Report as a **Static Image**, make sure to **Collect Image** before going to Viewer.
2. *Optionally*, if the Report contains filters in MS SSRS, [configure filtering](#) via **[Manage Filters]**
3. *Optionally*, **[Edit URL]** to modify the URL by appending a question mark (?) followed by any filter or parameter settings
4. *Optionally*, **[Test URL]** to test how the Report will be displayed on External Webpage or in Viewer, depending on the display option selected in the previous step
5. Select **Report Image** option:
 - "Always collect all instances of external report": collect all images and cache them on a schedule
 - "On Demand: only when needed for distribution": individual images are only collected when they need to be included in an email

3. Collect Image and Publish

External Reports / Demo MS SSRS External Report

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Report Image

Always collect all instances of external report

On Demand only when needed for distribution

Report Image Trigger

Daily

Save

Enable & Publish

On Homepage

Image Display

Homepage Preview image

ReportProducts

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ID	Year	Count Of Products	price	Date	Seller
1	2010	43	21	2/21/2012 12:00:00 AM	Mike
14	2011	33	50	8/24/2011 12:00:00 AM	Stive

Homepage thumbnail

ReportProducts

ID	Year	Count Of Products	price
1	2010	43	21
14	2011	33	50

1

Collect Image

Crop Tall Images to Default Size

1. [Collect Image]

- **NOTE:** Collecting an image for a Report that includes Filters on the MS SSRS side **won't be possible** without configuring Filters and Filter Defaults in Metric Insights. Access **Manage Filters** to [configure filtering](#) and then proceed with image collection.

2. [Enable & Publish]