

Creating an SSRS Membership Card

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Welcome!

- ▶ Today we will be learning how to create a SSRS Membership Card using IQA.
- ▶ This Membership Card can be added to an individual's profile in your RiSE website.
- ▶ This will encourage your members to self-service.
- ▶ Please note that this same concept can be used for many other types of reports that you would like individuals to print themselves online.
 - ▶ Example:
 - ▶ Certificates, transcripts, invoices, receipts and many more.

Assumptions

- ▶ We will be using Visual Studio 2008 to modify the SSRS Membership Card.
- ▶ Our examples will be used using iMIS 20.2.
- ▶ That you have had some exposure to the staff site.
- ▶ That you have had some exposure creating content pages.
- ▶ That you have had some exposure to the individual content profile for our organization's RiSE website.
- ▶ That your organization is using a RiSE website along with the individual profile page.

Overview of Training

- ▶ Create IQA with membership information.
 - ▶ Example: Full name, membership paid thru date, iMIS ID
 - ▶ Note: A dynamic filter is used to only show the Membership Card for the person who is logged in.
- ▶ Dynamically create SSRS Membership Card from IQA.
- ▶ Modify the SSRS Membership Card to meet our organization's standards.
 - ▶ Example: Add logo, font and colors.
- ▶ Upload the SSRS Membership Card to the individual profile on our organization's website.

Creating the IQA Query

- ▶ Login to the staff site
- ▶ Create the IQA with the membership fields that are needed.
- ▶ Use the on behalf of (OBO) feature to test your IQA query to ensure it is pulling the correct data.

Download the SSRS (RDL) Membership Card File from the IQA

- ▶ Once the IQA query has been created and is working properly a SSRS (RDL) file can be dynamically created.
- ▶ This RDL file can then be used with Visual Basic, BIDS or SQL Server Data Tools to tweak the report.
 - ▶ Note: The reporting tool varies depending on your version of SQL.

Visual Studio

- ▶ Create a new project in Visual Studio
- ▶ Import in the SSRS (RDL) file that was created by IQA.
- ▶ Update the data source in Membership Card report to read iMIS data.
- ▶ Modify the report by adding a logo, update the font and colors.
 - ▶ Note: The layout of the report may also need to be modified depending on your organization's needs.

Upload SSRS Membership Card

- ▶ Upload the SSRS Membership Card to the staff site document system.
 - ▶ Note: Both a Reporting Services Report and Reporting Services Template will need to be added in the document system.

Create Content Page for SSRS Membership Card

- ▶ A new content page will need to be created for the Membership Card.
- ▶ The SSRS Report iPart will be used.

Add SSRS Membership Card to Individual's Profile

- ▶ Locate your organizations content page for the individual profile.
 - ▶ Note: This can be found under the staff site>>RiSE>>Page Builder>>Manage Shortcuts>>My Account (under your organization's website)
- ▶ Add button to report using Big Button iPart.

View & Print Membership Card

- ▶ Logout of the staff site.
- ▶ Login to your organization's RiSE website as a public user.
- ▶ Click on their profile.
- ▶ Click on the Membership Card button.
 - ▶ To print download to PDF.

Thank You for Attending!

- ▶ We hope you enjoyed attending the training today.
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Customer Support

- ▶ If you require additional support please contact us at customersupport@enSYNC-corp.com.
- ▶ Please note that support may incur service fees.

Upcoming Webinars

- ▶ Feb 22 – Trends in Learning and How Technology Can Make it Happen for You!
- ▶ March 29 – Using Mobile the Right Way in Your Organization