

Creating a New Template Report

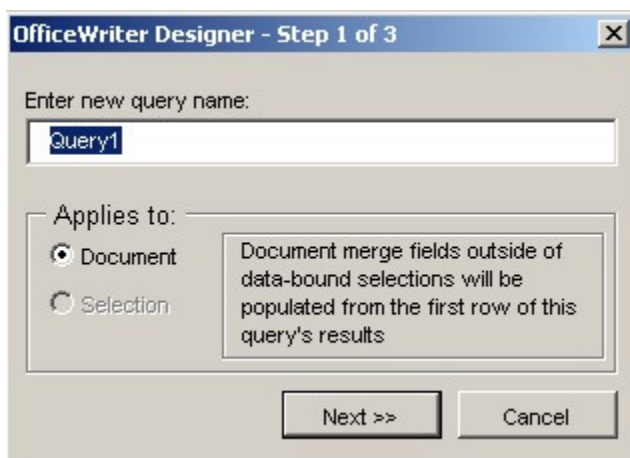
In [Adding a Template to an Existing Report](#), we see how to add OfficeWriter template information to a saved RDL file. In that case, the database query was defined before OfficeWriter opened the file in Word. This section will explain how to develop a report from start to finish in Word with OfficeWriter and Microsoft Query.



Before you begin, make sure that MS Query is enabled for the OfficeWriter Designer. Instructions for enabling MS Query can be found in [Using MS Query in Word to Design Reports](#).

Creating a Data Source

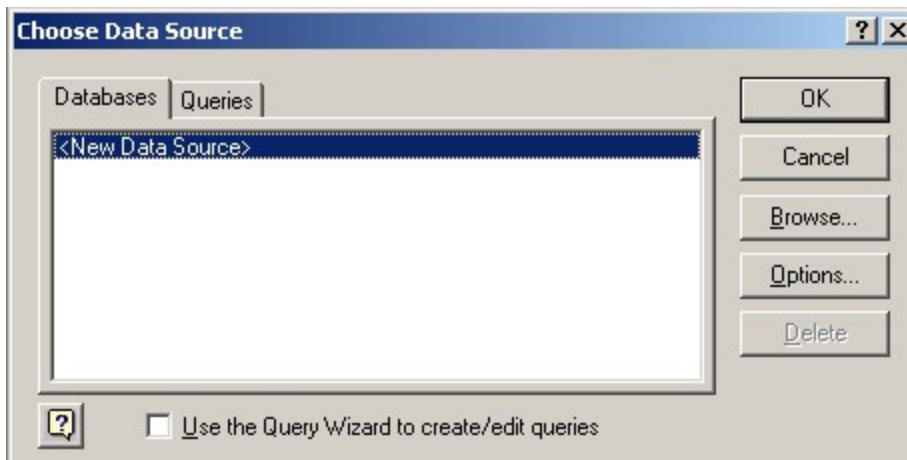
1. Open Word and create a new blank document.
2. Click **Add DataSet** on the OfficeWriter Designer toolbar.
3. In the dialog box, type in a name for the query (or leave the default name "Query1"). Click **Next**.



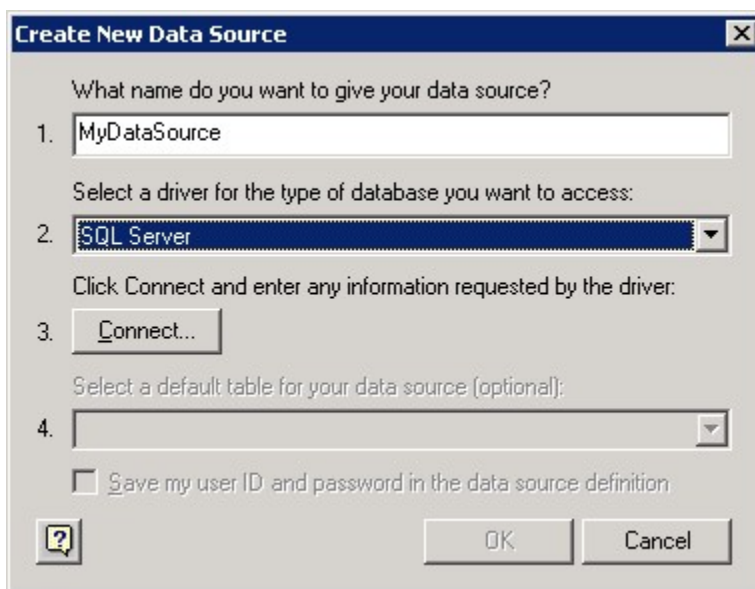
4. Click **Add New** to add a new database connection.



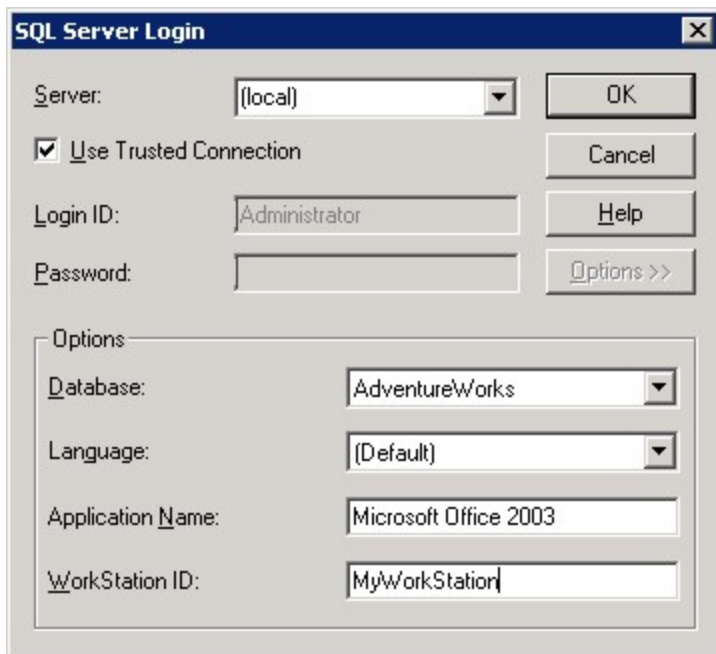
5. Select **New Data Source** and click **Ok**.



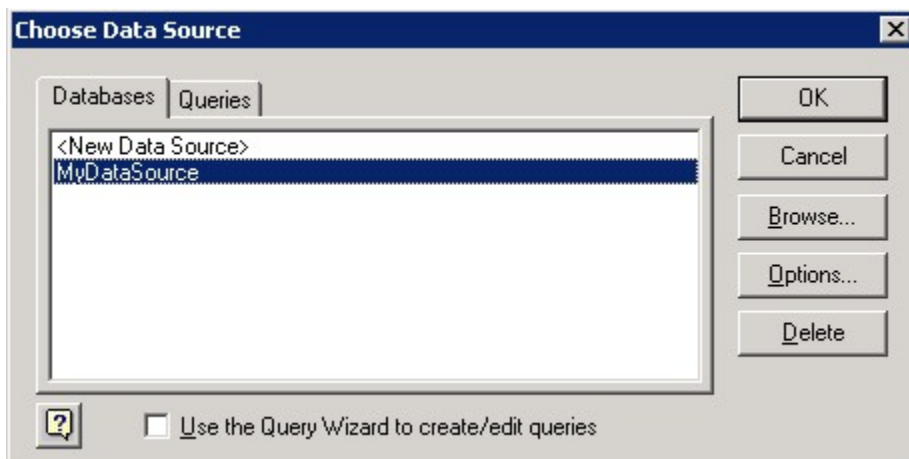
6. Enter a data source name and select **SQL Server** from the drop-down list of database drivers. Click **Connect**.



7. From the drop-down list of server names, select the server where the AdventureWorks database is installed. Click **Options** and select AdventureWorks as the default database. Click **Ok**.



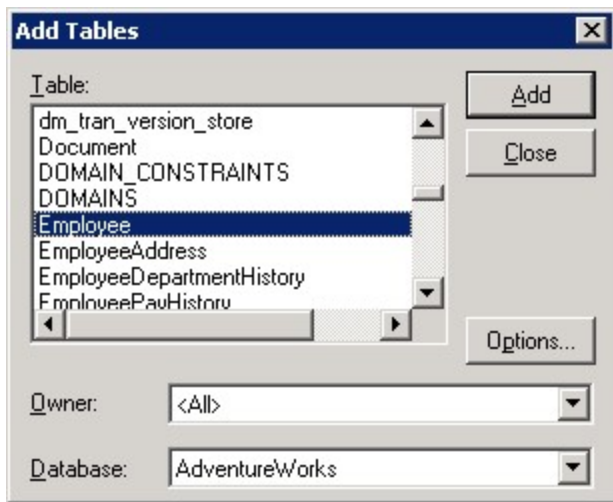
8. You should now be back at the **Create New Data Source** screen. Click **Ok**.
9. You will see your new data source in the **Choose Data Source** dialog. Select it and click **Ok** to open Microsoft Query.



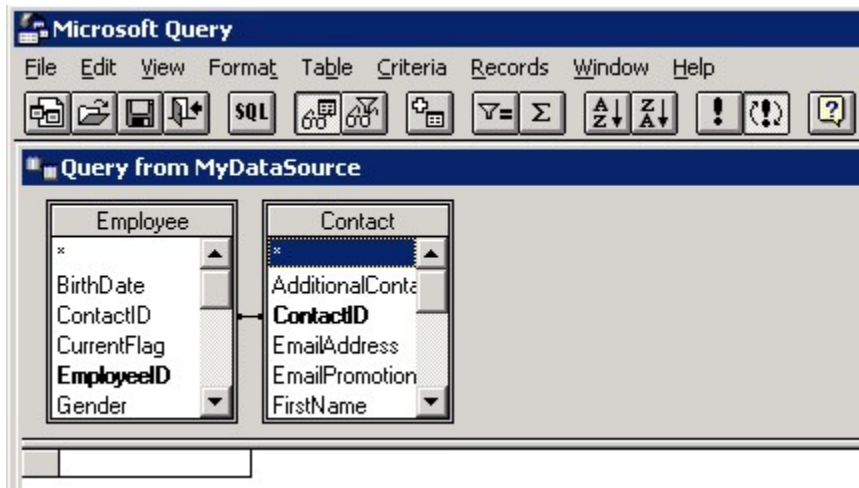
Building a Query

Next, we will build a query that will get the data for our report from the database. OfficeWriter Designer uses Microsoft Query to create queries. When we finished creating our sample Data Source above, Microsoft Query opened.

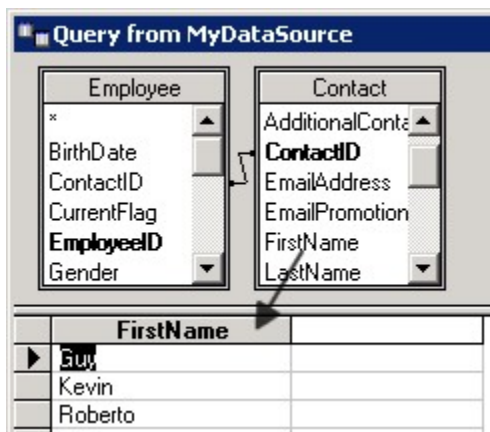
1. In the **Add Tables** dialog box, find the **Employee** table in the list and select **Add**. Then, find the **Contact** table and select **Add**.



2. Click **Close**. The Employee and Contact tables should now be in MS Query.



3. Add the **FirstName** and **LastName** fields to your query by dragging them from the **Contact** table box to the space below, as shown. Do the same with **EmployeeID** from the **Employee** table.



Your query should now look like this:

Query from MyDataSource

| Employee | Contact |
|-------------------|------------------|
| * | AdditionalConte |
| BirthDate | ContactID |
| ContactID | EmailAddress |
| CurrentFlag | EmailPromotion |
| EmployeeID | FirstName |
| Gender | LastName |

| | FirstName | LastName | EmployeeID |
|---|-----------|------------|------------|
| ► | Guy | Gilbert | 1 |
| | Kevin | Brown | 2 |
| | Roberto | Tamburello | 3 |
| | Rob | Walters | 4 |
| | Thierry | D'Hers | 5 |
| | David | Bradley | 6 |
| | JoLynn | Dobney | 7 |
| | Ruth | Ellerbrock | 8 |
| | Gail | Erickson | 9 |
| | Barry | Johnson | 10 |

4. We will add a filter so that only current employees are returned from our query. Click **Show/Hide Criteria** on the Microsoft Query toolbar.



5. Pull down the **Criteria Field** list and select **Employee.CurrentFlag** as shown. Enter the value 1.

Query from MyDataSource

| Employee | Contact |
|-------------------|------------------|
| * | AdditionalConte |
| BirthDate | ContactID |
| ContactID | EmailAddress |
| CurrentFlag | EmailPromotion |
| EmployeeID | FirstName |
| Gender | LastName |

Criteria Field: CurrentFlag
 Value: 1
 or:

6. From Microsoft Query's **File** menu, select **Return to OfficeWriter Designer**.

Adding Merge Fields

A merge field is a placeholder for database values. When the report is published, OfficeWriter will replace the merge fields with data from the database.

1. Place your cursor at the top left of your document.
2. Click **Merge Fields** on the OfficeWriter toolbar and make sure that the query you just created is selected from the list of **DataSets**.
3. Under **Insert Merge Field** on the OfficeWriter toolbar, select **EmployeeID** to insert the field in the document.

«Query1.EmployeeID»

4. Press the Tab key to add a space after the field you inserted.

5. Repeat the above steps to insert a field for **Lastname**.
6. Type a comma and a space after the Lastname merge field.
7. Repeat the steps to insert a merge field for **Firstname**.
8. Press Enter. Your report should look like this:

```
«Query1.EmployeeID»      «Query1.LastName», «Query1.FirstName»
|
```

9. Highlight the line in your document that contains the merge fields, and a blank line below the line of merge fields.

```
«Query1.EmployeeID»      «Query1.LastName», «Query1.FirstName»
|
```

10. Go to **Merge Fields** > your data set > **Set Selection to Repeat Region** to set the highlighted area to be a [repeat region](#).



Note on step 9: If you highlight the line of merge fields without highlighting a line after it, the report will repeat the fields for each row of data on the same line in the document. Since we want each row of data to appear on a new line in the document, we must select the blank line below the merge fields. This ensures that a line break is contained in the query range.

Saving and Publishing

Do **not** use Word's **File/Save** menu item to save your template. Use the **Save** button on the OfficeWriter toolbar to save your template as a report definition file in the RDL format.

1. From the OfficeWriter Designer toolbar select **Save** > **Save to Disk**.
2. Navigate to a local folder where you will store the template report file. This will be where you store your work file in case you want to edit it later, **not** a location on the Reporting Services server.
3. Save the template as an RDL file.

Next, [deploy](#) and [view](#) your report. Your results should look like this:

```
1  Gilbert, Guy
2  Brown, Kevin
3  Tamburello, Roberto
4  Walters, Rob
5  D'Hers, Thierry
6  Bradley, David
7  Dobney, JoLynn
8  Ellerbrock, Ruth
9  Erickson, Gail
10 Johnson, Barry
11 Goldberg, Jossef
12 Duffy, Terri
13 Higa, Sidney
14 Maxwell, Taylor
15 Ford, Jeffrey
16 Brown, Jo
```

Samples

[Download the .rdl file created in this section.](#)