

Workflow for building SSRS Reports

This article will walk you through the steps for building an SSRS Report with the OfficeWriter integration.

Step 1: Create an RDL file using Visual Studio or Report Builder

The report RDL file should have all the data information for running the report. This includes defining the data sources, creating data sets with queries, and adding any report parameters. These details will be used by Reporting Services to retrieve the data when the report is rendered.

If you want to render the report with the default rendering extensions, make sure to design your report in the report builder tool as well.



Good Practice

Before opening the RDL with the OfficeWriter Designer:

1. Save a back-up copy of your report. The Designer will add information to the RDL and it is very difficult to revert the RDL to its original state. Keep a clean back-up copy in case you need to start over.
2. Upload your report to Report Manager and export to one of the default formats. This will confirm that your queries and data sources are configured correctly for your Reporting Services instance.

Step 2: Put the report in a location so that the users who are designing the report for Excel or Word can reach it

Most customers build a single RDL that contains all the data available for a set of reports, then post the RDL to somewhere that the end-users can get to. Then the end-users can design numerous Excel and/or Word reports using that RDL file.

This means that the person designing the reports in Excel or Word doesn't need to know how to build RDL files, what the database schema looks like, and doesn't have to write queries since that process can be handled by someone else.

Step 3: Design the report in Excel and/or Word

End users should use the OfficeWriter Designer to retrieve the report from where it was stored. They can retrieve it from a remote server (usually the SQL Server Reporting Services report server) or open the report from disk if it's stored locally.

The OfficeWriter Designer has Add-Ins for Excel and Word, so end-users have access all the functionality that is available natively in Excel and Word. Since the OfficeWriter SSRS Integration is built on [ExcelTemplate](#) and [WordTemplate](#) functionality, designing the report template is the same as working with templates for ExcelTemplate and WordTemplate.



Good Practice

You can write your own data markers and merge fields, but you should insert at least one data marker/merge field using the OfficeWriter Designer toolbar so that the OfficeWriter Designer adds the correct information for binding the data to the template file

NOTE: If you want to export to Excel and Word, you need to design the report once in Excel (save/publish) and then in Word (save/publish) - not necessarily in that order

Step 4: Save/Publish the report

Once the report has been designed, end-users can save the report to disk or publish the report to a report server. The report needs to be published to the report server before it can be exported using the OfficeWriter Renderer.



Good Practice

If you are working on a report that others access, you will want to save the report with a unique name to avoid overwriting reports that might be built from the same RDL file.

Step 5: Rendering the Report

Once the report is published on the server, it can be rendered by Reporting Services and the OfficeWriter Renderer the same way that the other rendering extensions work.

NOTE: The OfficeWriter Designer preview functionality makes a request to render the report from the report server and then opens the output in Excel or Word. Therefore, the report must be published on the report server before it can be previewed.

Revisiting a Designed Report:

- If you are migrating between versions of Reporting Services (2005, 2008, 2008 R2), make sure to grab the latest version of the OfficeWriter Designer and save or publish the report using that version of the Designer before saving the RDL in the file format. If you save the RDL in the report format, the OfficeWriter Designer may not be able to correctly update the file for the latest version.
- You can make changes to the data information in the report after it's been designed by the OfficeWriter Designer, but avoid shifting between designing with the OfficeWriter Designer and Visual Studio/Report Builder.