Create an Excel Report from an Existing RDL

This tutorial will help you design your first report in Excel using the OfficeWriter for Excel Designer.NET from an existing report file (RDL) that was created in Visual Studio or Report Builder. We will build a simple employee list and display some basic information about each employee.

> ⓘ **Tutorial Requirements:**
> 1. **Reporting Services** is installed on a server you can access, working properly, and you have rights to publish and view reports.
> 2. The **AdventureWorks** data base (which is an optional component in the Reporting Services installation) is installed on the Reporting Services server.
> 3. **OfficeWriter** is installed on the Report Server
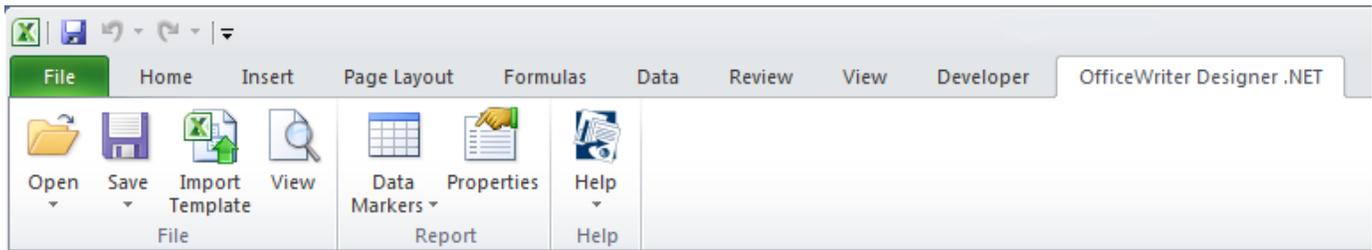> 4. **OfficeWriter Designer.NET** is installed on your local PC
>
> For more information on installing and configuring OfficeWriter Reporting Services Integration, see Installation or contact your System Administrator.

> ⚠ A sample RDL and Template file are available for download in the Samples section.

OfficeWriter Designer.NET Toolbar

The control center for creating reports with OfficeWriter is the OfficeWriter Designer.NET toolbar. When you open Excel, you will the OfficeWriter Designer.NET tab in the ribbon.


If you do not see the toolbar:

- Make sure that you ran the installer for the OfficeWriter Designer.NET, which is a separate installer from OfficeWriter.
- If you do not see the toolbar after running the installer, the toolbar may have been disabled. Please see this Knowledge Base article for more information.

Opening a Report File

An RDL file is an xml-based report definition file. In this tutorial we will assume the RDL was created in Visual Studio or Report Builder.

1. Open Microsoft Excel

2. Go to the **OfficeWriter Designer.NET** tab and click **Open.**

3. If your report definition file was saved on a local or network drive, choose **Open From Disk** from the drop down.
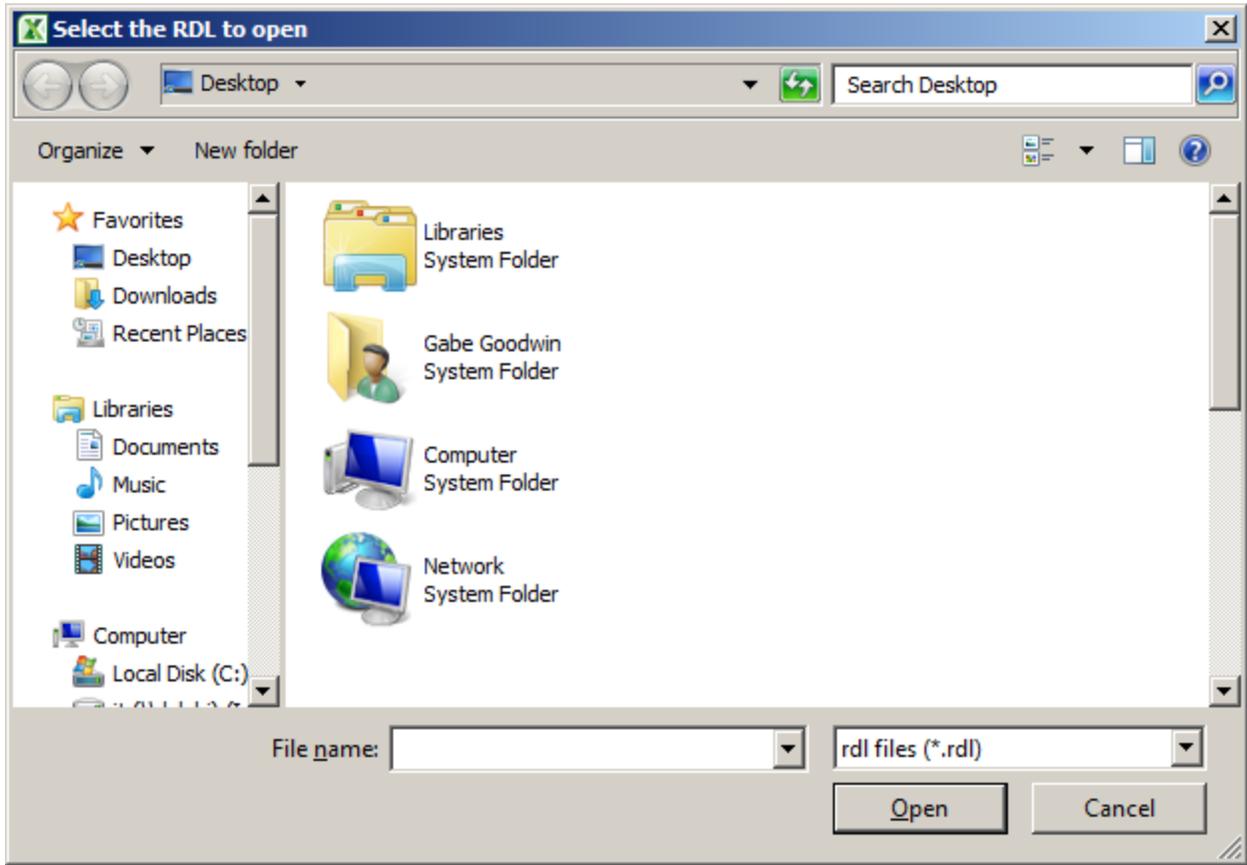
4. If your RDL file was deployed to Reporting services, choose **Open From Server**.
   In the Report Browser dialog box, type in your report server's URL or Domain name and click **Refresh**. This will load all the available report folders into the list box. Navigate to your report file, select it, and click **Ok**.
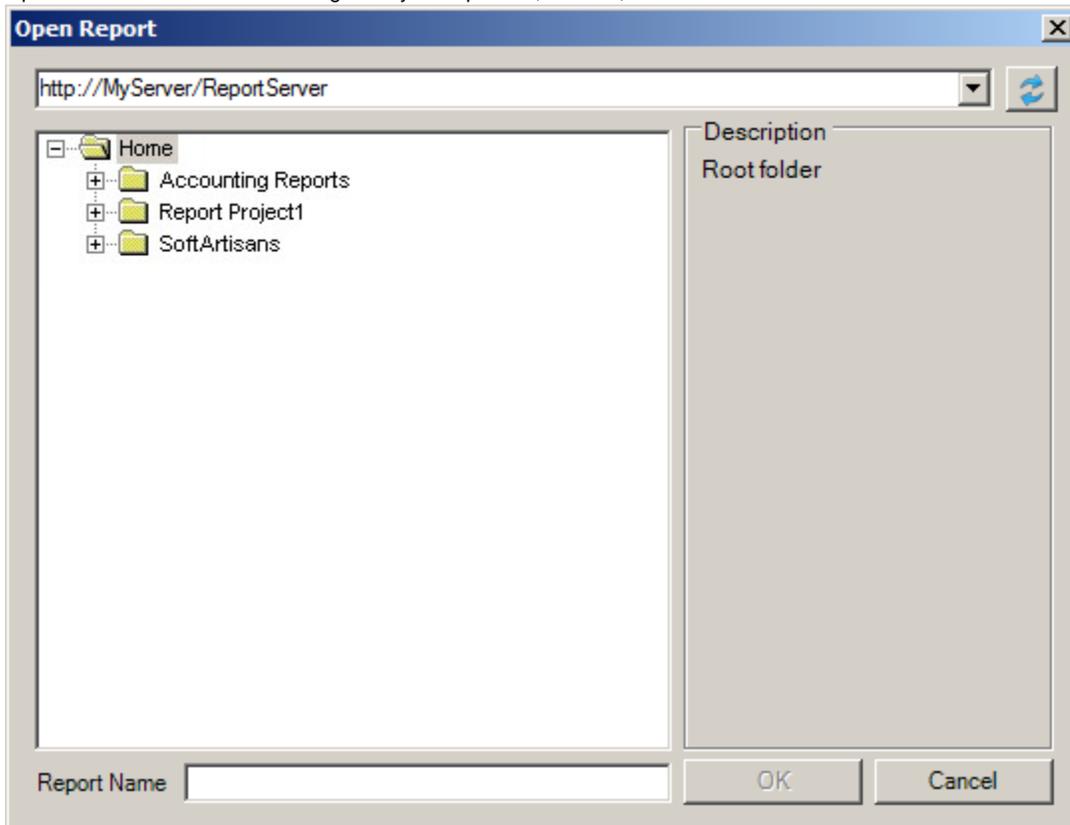
Once the RDL file is opened in the Designer, there are two ways to design your report.

1. Manually Add Fields to Your Report
2. Import a Template

Adding Fields to Your Report

When you open the report, the Designer.NET parses the RDL for information about the data sets and makes that information available while you are working in Excel. Data sets will appear in a drop-down list and you will be able to insert fields from those data sets into the Excel template as data placeholders called data markers.

For this tutorial we will use an RDL that was created in Visual Studio containing a data set with the following query:

```
SELECT Production.Product.ProductID, Production.Product.Name,
Production.ProductListPriceHistory.ListPrice,
   Production.Product.DaystoManufacture
FROM Production.Product
   INNER JOIN Production.ProductListPriceHistory
   ON Production.Product.ProductID = Production.ProductListPriceHistory.ProductID
```

1. Place your curse in the cell A2 and click inside it. This is where we will insert the data marker.

2. Click **Data Markers** on the Designer.NET toolbar and locate your data set from the drop-down list.
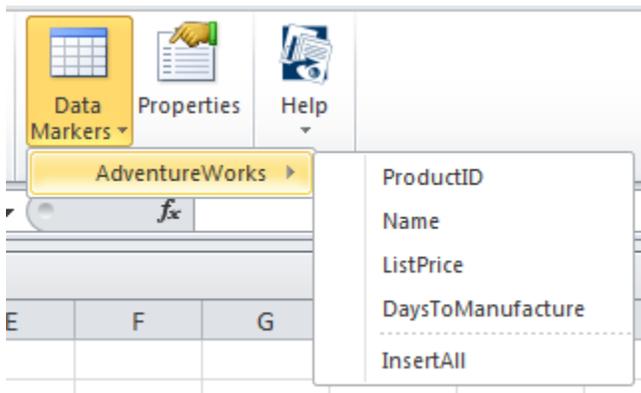
3. Hover over your data set to see the fields that are available.

4. Select the **ProductId** field to insert the data marker into cell A2. Your template should now look like this:

5. Place your cursor in cell B2 cell and click inside it.

6. Click **Data Markers** again, hover over your data set, and select the **Name** field. Your template should now look like this:

7. Place your cursor in cell C2 cell and click inside it.

8. Click **Data Markers**, hover over the data set, and select the **ListPrice** field.

9. Place your cursor in cell D2 cell and click inside it.

10. Click **Data Markers**, hover over your data set, and select the **Days to Manufacture** field.

11. In cell A1 type **Product ID**, in cell B1 type **Product Name**, in C1 type **List Price**, and in D1 type **Days to Manufacture**.
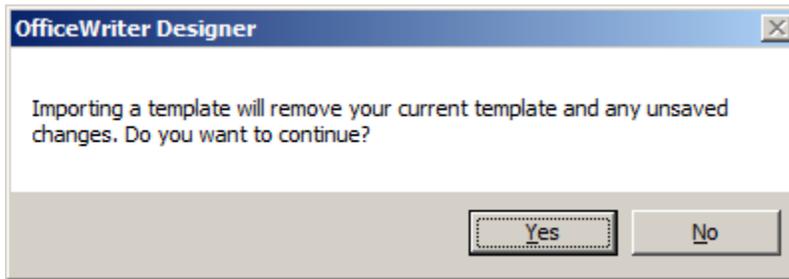
Your finished report template should look like this:

	A	B	C	D
1	Product ID	Product Name	List Price	Days to Manufacture
2	%%=AdventureWorks.ProductID	%%=AdventureWorks.Name	%%=AdventureWorks.ListPrice	%%=AdventureWorks.DaysToManufacture

Importing a Template

With the Designer.NET you can use the **Import Template** button to import a pre-existing .xlsx template file containing data markers and formatting.

1. Click **Import Template** and browse to the file you want to import.

2. You will receive the following dialog box confirming the import:

3. The sample report will look like the following when it is imported.

	A	B	C	D
1		AdventureWorks Template		
2	Product ID	Product Name	List Price	Days to Manufacture
3	%%=AdventureWorks.ProductID	%%=AdventureWorks.Name	%%=AdventureWorks.ListPrice	%%=AdventureWorks.DaysToManufacture

Publish and View Your Report

Before publishing the report on the Reporting Services server, we must save the Excel template locally as an RDL file.

1. From the OfficeWriter Designer.NET toolbar select **Save**. You will have the option to **Save to Disk** or **Deploy to Remote Server**.

2. Select **Save to Disk**.

3. 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.

4. Save the template as an RDL file.

Next, publish the report to the Reporting Services server.

1. To publish the report, from the toolbar, click **Save** and select **Deploy To Remote Server**.

2. From the Publish dialog box select the drop-down to display the Server or URL.

3. If the dropdown contains the server you need, select it.
   If the dropdown does not contain the server, you will need to manually enter the Web Service URL. The Web Service URL can be found

in the SSRS Configuration Manager on the report server. It usually looks something like this: http://<servername>/ReportServer, or if there is a named instance of SQL Server, http://<servername>/ReportServer_IntanceName

4. Click **Refresh**.

5. Select a folder for which you have publish rights and click **Ok**.

6. If your report published with no errors, you will receive a **Publish Successful** message dialog. Click **Ok** to continue.

7. To view the report, click **View** on the OfficeWriter Designer.NET toolbar. The report viewer will open another Excel window with the report results. It should look like this:

	A	B	C	D
1	Product ID	Product Name	List Price	Days to Manufacture
2	707	Sport-100 Helmet, Red	33.6442	0
3	707	Sport-100 Helmet, Red	33.6442	0
4	707	Sport-100 Helmet, Red	34.99	0
5	708	Sport-100 Helmet, Black	33.6442	0
6	708	Sport-100 Helmet, Black	33.6442	0
7	708	Sport-100 Helmet, Black	34.99	0
8	709	Mountain Bike Socks, M	9.5	0
9	710	Mountain Bike Socks, L	9.5	0
10	711	Sport-100 Helmet, Blue	33.6442	0
11	711	Sport-100 Helmet, Blue	33.6442	0
12	711	Sport-100 Helmet, Blue	34.99	0
13	712	AWC Logo Cap	8.6442	0
14	712	AWC Logo Cap	8.6442	0
15	712	AWC Logo Cap	8.99	0
16	713	Long-Sleeve Logo Jersey, S	48.0673	0
17	713	Long-Sleeve Logo Jersey, S	48.0673	0
18	713	Long-Sleeve Logo Jersey, S	49.99	0
19	714	Long-Sleeve Logo Jersey, M	48.0673	0
20	714	Long-Sleeve Logo Jersey, M	48.0673	0
21	714	Long-Sleeve Logo Jersey, M	49.99	0
22	715	Long-Sleeve Logo Jersey, L	48.0673	0
23	715	Long-Sleeve Logo Jersey, L	48.0673	0
24	715	Long-Sleeve Logo Jersey, L	49.99	0
25	716	Long-Sleeve Logo Jersey, XL	48.0673	0
26	716	Long-Sleeve Logo Jersey, XL	48.0673	0
27	716	Long-Sleeve Logo Jersey, XL	49.99	0
28	717	HL Road Frame - Red, 62	1263.46	1
29	717	HL Road Frame - Red, 62	1301.364	1
30	717	HL Road Frame - Red, 62	1431.5	1

8. Select **Close Report View** to return to your report template.

To verify that your report is actually running on Reporting Services:

1. Open a browser and go to the Reporting Services Report Manager (usually installed at http://<server address>/Reports).

2. Navigate to where you published your report.

3. Select the report. Reporting Sevices will display the report but only show you the data set.

4. From the export option drop-down, choose **Excel designed by OfficeWriter**.

5. When prompted, click **Open** . Excel will open and display your report the way you created it.

Samples

RDL: Excel-QuickStartRDL2008R2.rdl

Template: ExcelQuickStartTemplate.xlsx

> ⚠️ If you are using the original OfficeWriter Designer see Create an Excel Report from an Existing RDL using VBA Designer