

Create a Word Report From an Existing RDL

This tutorial will help you design your first report in Word using the OfficeWriter for Word Designer 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.



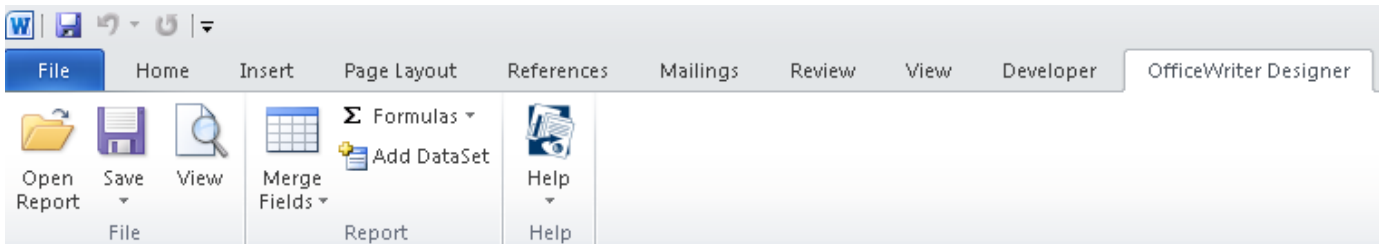
Tutorial Requirements:

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** is installed on your local PC

For more information on installing and configuring OfficeWriter Reporting Services Integration, see [Installation](#) or contact your System Administrator.

OfficeWriter Designer Toolbar

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



If you do not see the toolbar:

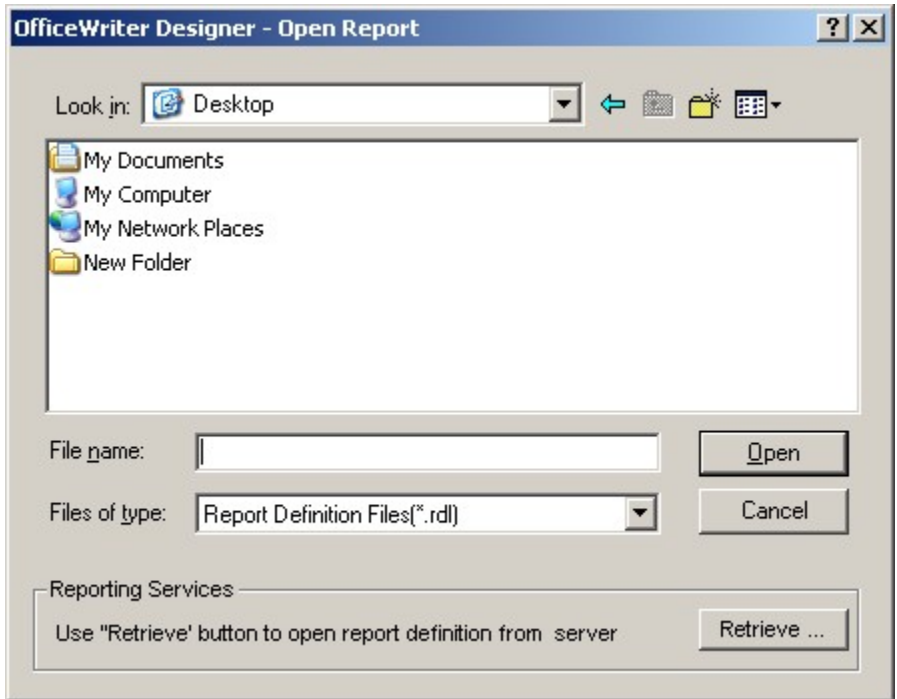
- Make sure that you ran the installer for the OfficeWriter Designer, which is a separate installer from OfficeWriter.
- If you do not see the toolbar after running the installer, the toolbar may have been disabled. Please see this [OfficeWriter Answers Post](#) for more information.

Opening a Report File

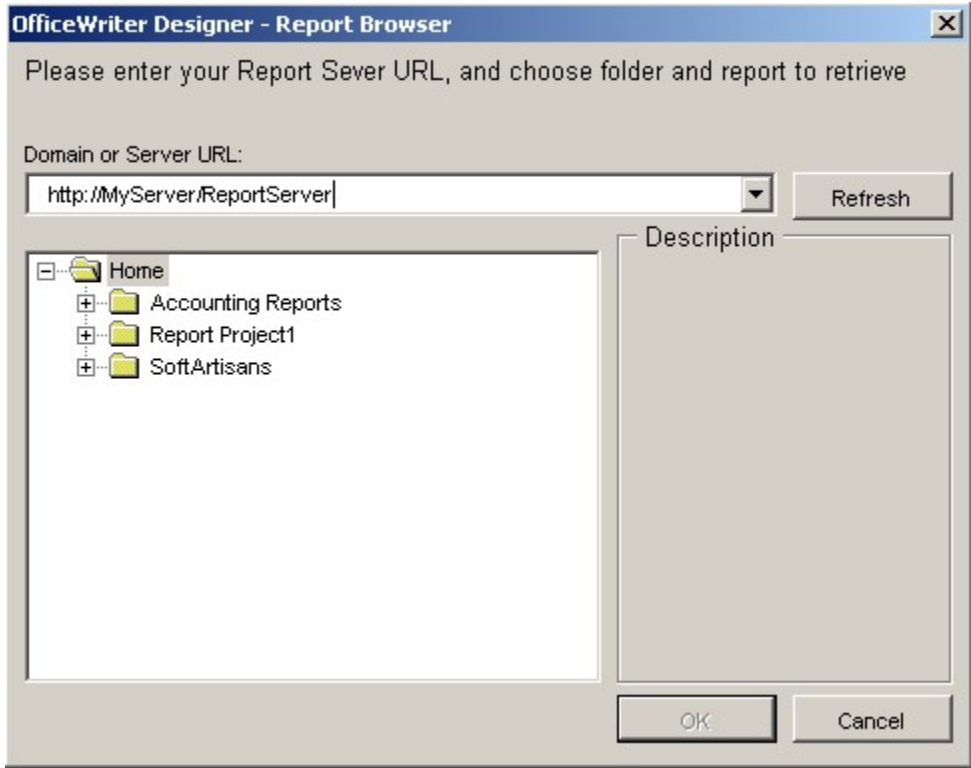
An RDL file is an xml-based report definition file. In this tutorial we will assume the RDL was created in Visual Studio or Report Builder. If you are interested in creating RDLs with the OfficeWriter Designer, read [Using MS Query in Word to Design Reports](#).

1. Open Microsoft Word
2. Go to the **OfficeWriter Designer** tab and click **Open Report**
3. If your report definition file was saved on a local or network drive, navigate to the folder containing the file, select it, click **Open**, and continue to **Adding Fields to your report**

If your RDL file was deployed to Reporting Services, click the **Retrieve** on the bottom right corner of the dialog box.



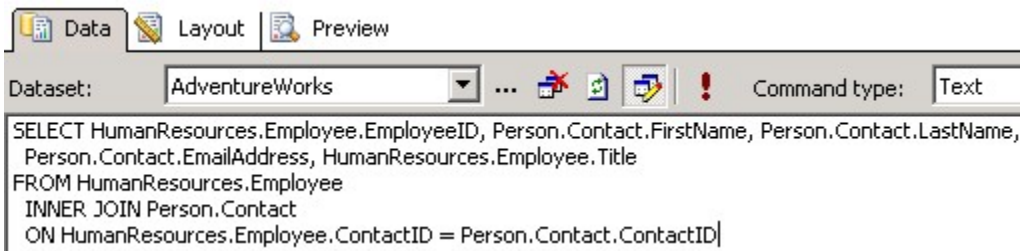
- 4. In the Report Browser dialog box, type in your report server's URL or Domain name and click **Refresh**. This will load all the available report folders into the list box. Navigate to your report file, select it, and click **Ok**.



Adding Merge Fields to Your Report

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



After opening your report in Word with the OfficeWriter toolbar, you should find your query listed under **Merge Fields > DataSets**.

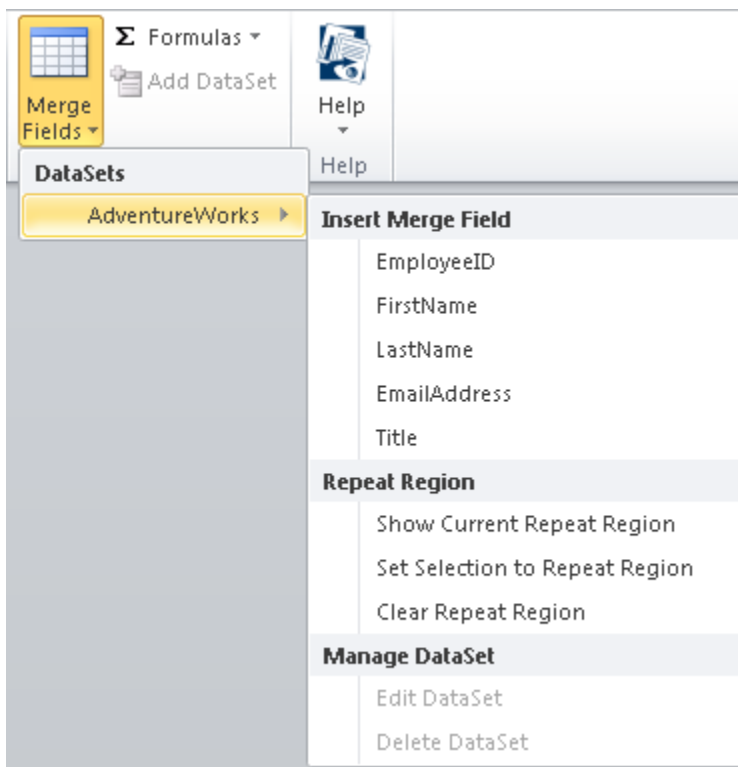
1. Place a two column, two row table in your report template.

AdventureWorks

Human Resources Dept.

Employee Listing

2. Place your cursor in the top left cell of the table.
3. Go to **Merge Fields** in the OfficeWriter Designer toolbar and locate your query from the drop-down list.
4. Hover over the query to open the **Merge Field Menu**.



5. Select **LastName** from under **Insert Merge Field** to insert a merge field into the table cell. Your report should now look like this:

AdventureWorks

Human Resources Dept.

Employee Listing

«AdventureWorks.LastName»	

6. After the **AdventureWorks.LastName** merge field, type in a comment and a space. Go to **Merge Fields** > the data set > **Insert Merge Field** and select **FirstName**. Your report should now look like this:

AdventureWorks

Human Resources Dept.

Employee Listing

«AdventureWorks.LastName», «AdventureWorks.FirstName»	

7. Place your cursor in the top right cell of the table. Go to **Merge Fields** > the data set > **Insert Merge Field** and select **Title**.
8. In the bottom left cell, type **Employee ID:** and insert the **EmployeeID** field.
9. Place your cursor in the bottom right cell of the table. Insert the **EmailAddress** field.

Your finished report template should look like this:

AdventureWorks

Human Resources Dept.

Employee Listing

«AdventureWorks.LastName», «AdventureWorks.FirstName»	

Setting a Repeat Region

There are two ways to import data into an OfficeWriter for Word report: at the **Document** level or in a **Repeat Region**. If a dataset is imported at the **Document** level, merge fields from this query can appear anywhere in the document, and only the first row of data is imported into the report. If a dataset is imported into a **Repeat Region**, merge fields for that dataset must be contained in a section of the document wrapped in a special bookmark. Everything within the bookmark region will be repeated for each row of data in the dataset.

By default, all merge fields are considered to be at **Document** level. To set a dataset to import into a **Repeat Region**:

1. With your mouse, highlight the entire table on your report. Select not only the table, but also include the blank row below the table.

AdventureWorks

Human Resources Dept.

Employee Listing

«AdventureWorks.LastName»,	«AdventureWorks.Title»
«AdventureWorks.FirstName»	«AdventureWorks.Title»
Employee ID:	«AdventureWorks.EmailAddress»
«AdventureWorks.EmployeeID»	«AdventureWorks.EmailAddress»

2. Go to **Data Markers** > the data set. Under **Repeat Region**, select **Set Selection to Repeat Region** to wrap the section in the repeat bookmark.



If you highlight a table without highlighting a row after it, the report will include a separate table for each employee without spaces between them. It would look like one long continuous table. Many times you will want to do this, but for this demo, we want to make it look like separate tables.

Publish and View Your Report

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

1. From the OfficeWriter Designer 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.
5. To publish the report, from the toolbar, click **Save** and select **Deploy To Remote Server**.
6. From the Publish dialog box select the drop-down to display the Server or URL.
7. Choose the server on which Reporting Services is installed.
8. Click **Refresh**.
9. Select a folder for which you have publish rights and click **Ok**.
10. If your report published with no errors, you will receive a **Publish Successful** message dialog. Click **Ok** to continue.
11. To view the report, click **View** on the OfficeWriter Designer. The report viewer will open another Word window with the report results. It should look like this:

AdventureWorks

Human Resources Dept.

Employee Listing

Gilbert, Guy	Production Technician - WC60
Employee ID: 1	guy1@adventure-works.com

Brown, Kevin	Marketing Assistant
Employee ID: 2	kevin0@adventure-works.com

Tamburello, Roberto	Engineering Manager
Employee ID: 3	roberto0@adventure-works.com

Walters, Rob	Senior Tool Designer
Employee ID: 4	rob0@adventure-works.com

D'Hers, Thierry	Tool Designer
Employee ID: 5	thierry0@adventure-works.com

12. 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 Services will display the report but only show you the data set.
4. From the export option drop-down, choose **Word designed by OfficeWriter**.
5. When prompted, click **Open** . Word will open and display your report the way you created it.

Samples

Download the .rdl file described in this tutorial.