Creating a New Template

In Adding a Template to an Existing Report Defintion, 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 Excel. This section will explain how to develop a report from start to finish in Excel 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 Excel to Design Reports.
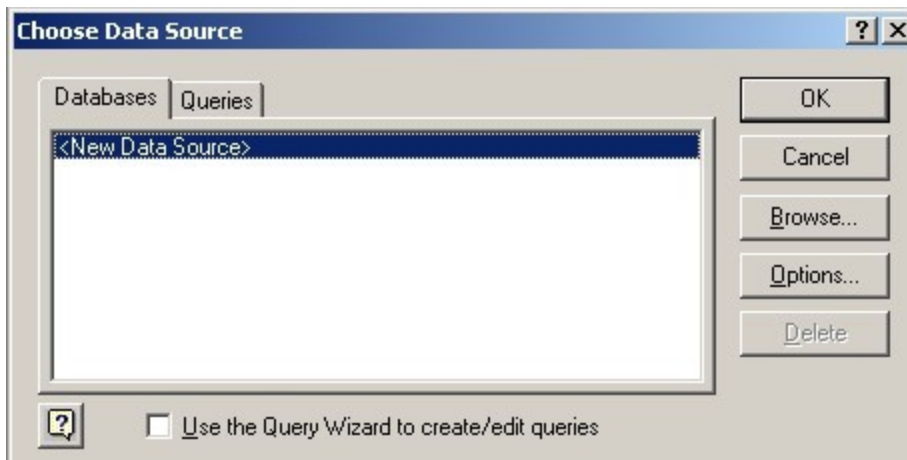
Creating a Data Source

1. Open Excel.

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**.
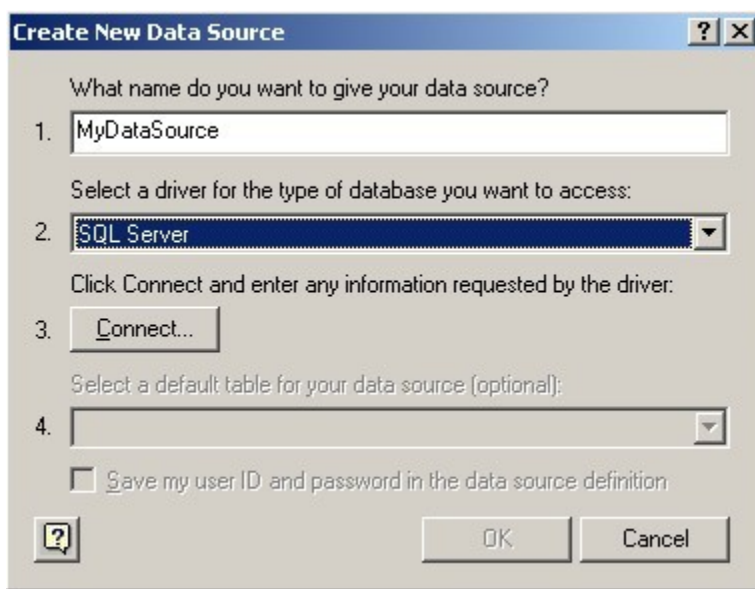

4. Click **Add New** to add a new database connection.

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

Choose Data Source

Databases | Queries

<New Data Source>

☐ Use the Query Wizard to create/edit queries

OK
Cancel
Browse...
Options...
Delete

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

Create New Data Source

What name do you want to give your data source?

1. MyDataSource

Select a driver for the type of database you want to access:

2. SQL Server

Click Connect and enter any information requested by the driver:

3. Connect...

Select a default table for your data source (optional):

4.

☐ Save my user ID and password in the data source definition

OK   Cancel

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**.
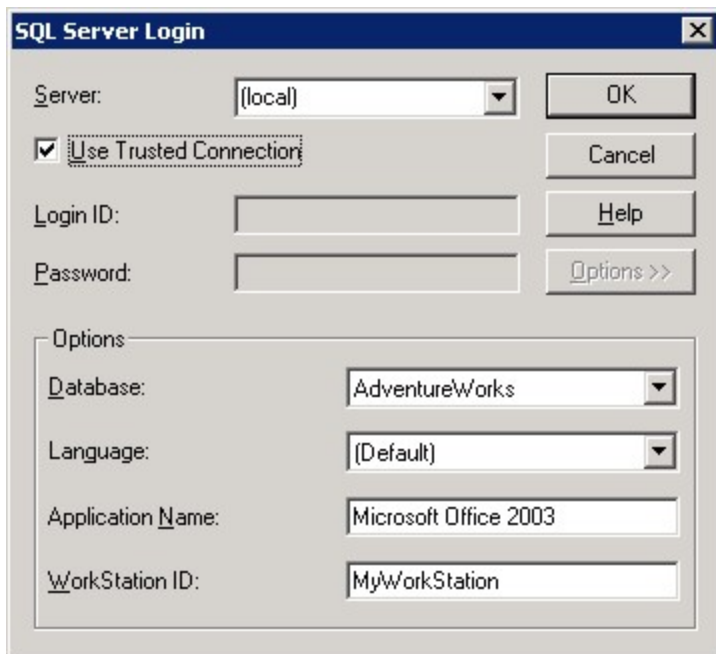
8. You should now be back at the **Create New Data Source** screen. Click Ok.

9. You will see your new data source in the **Choose Data Source** dialog. Select it and click **Ok** to open Microsoft Query.
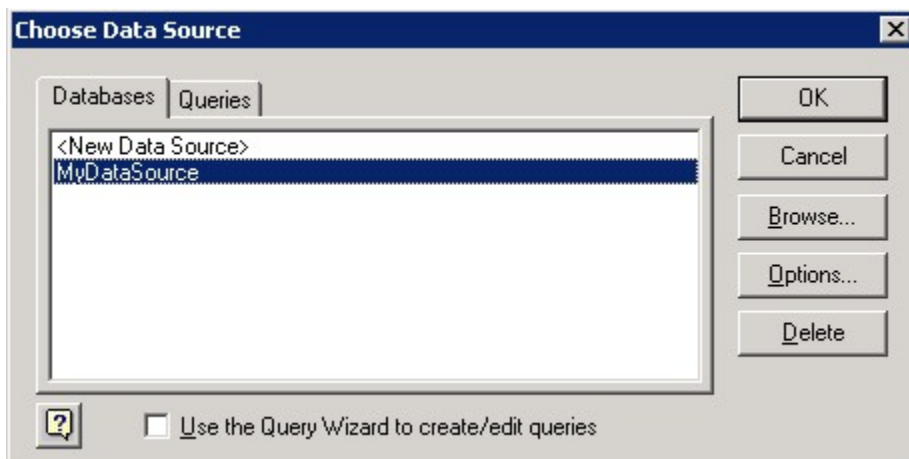

Building a Query

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 **HumanResources.Employee** and **Person.Contact** table in the list and select **Add**.
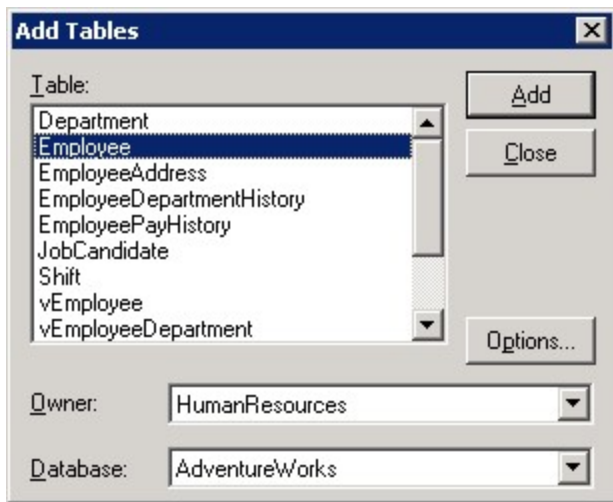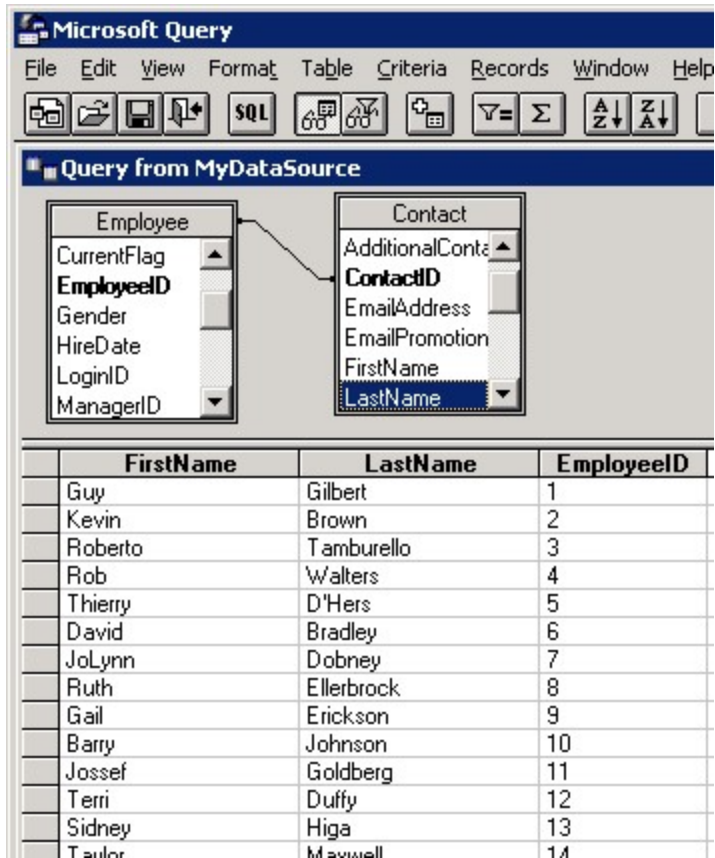
2. Click **Close**. The Employee and Contact tables should now be in MS Query.
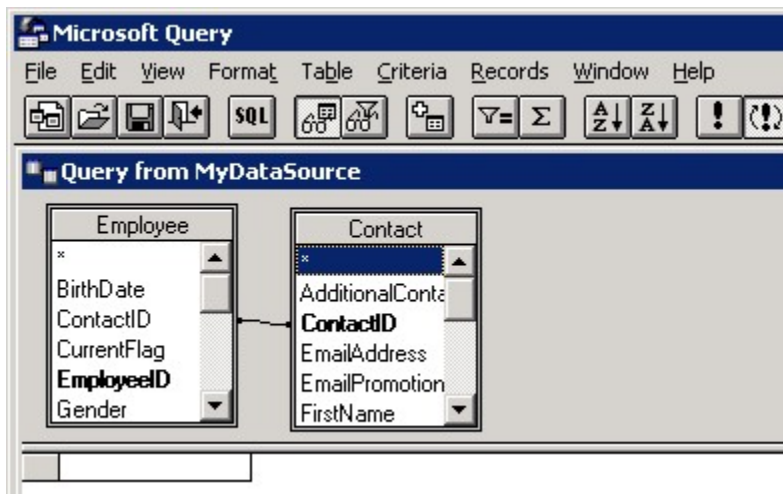
3. Add the **Contact.FirstName**, **Contact.LastName**, and **Employee.EmployeeID** fields to your query by double-clicking on the items. When you do, the columns will be added to the query.

   Your query should now look like this:

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

Adding Data Markers

A data marker is a placeholder for database values. When the report is published, OfficeWriter will replace the data markers with data from the database.

1. Place your cursor in cell A1.

2. Click **Data Markers** on the OfficeWriter toolbar and navigate the dataset you just created.

3. Select **EmployeeID** from the list of fields in the dataset to insert the field in cell A1.

4. Place your cursor in cell B1.

5. Click **Data Markers**, navigate to the data set and select **Lastname** from the list of dataset fields.

6. Place your cursor in cell C1.

7. Click **Data Markers**, navigate to the data set and select **Firstname** fromt he list of dataset fields. Your report should look like this:

Saving and Publishing

Do **not** use Excel's **File/Save** menu item to save your template; use the **Save** button from the OfficeWriter Designer toolbar to save your template as an RDL (report definition file).

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:

	A	B	C
1	1	Gilbert	Guy
2	2	Brown	Kevin
3	3	Tamburello	Roberto
4	4	Walters	Rob
5	5	D'Hers	Thierry
6	6	Bradley	David
7	7	Dobney	JoLynn
8	8	Ellerbrock	Ruth
9	9	Erickson	Gail
10	10	Johnson	Barry
11	11	Goldberg	Jossef
12	12	Duffy	Terri
13	13	Higa	Sidney
14	14	Maxwell	Taylor
15	15	Ford	Jeffrey
16	16	Brown	Jo
17	17	Hartwig	Doris
18	18	Campbell	John
19	19	Glimp	Diane
20	20	Selikoff	Steven

Samples

Download the .rdl file described in this section.