



# Report Builder

**Sample manual - first two chapters**



**Wise Owl**  
Training

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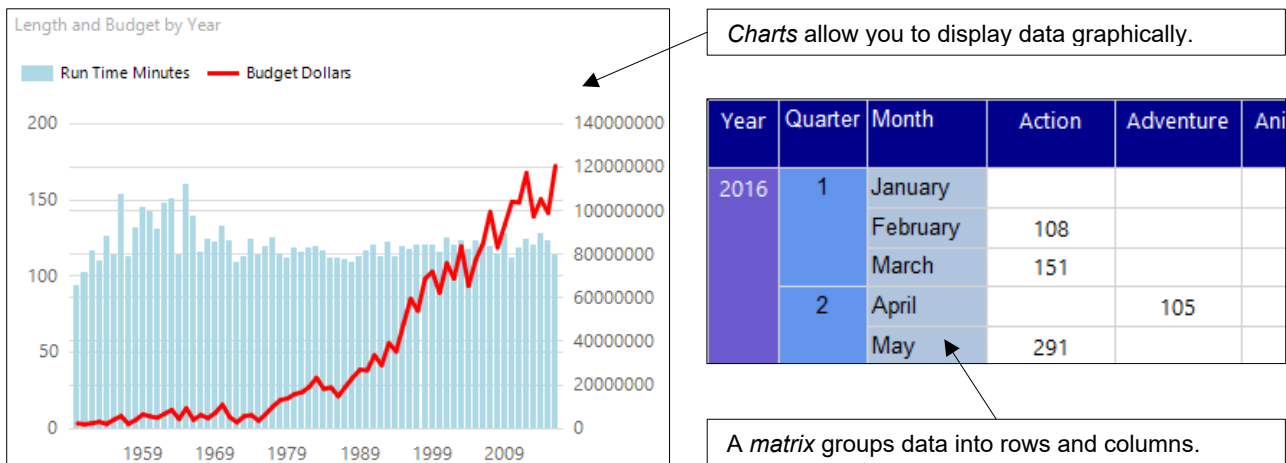
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## CHAPTER 1 - GETTING STARTED

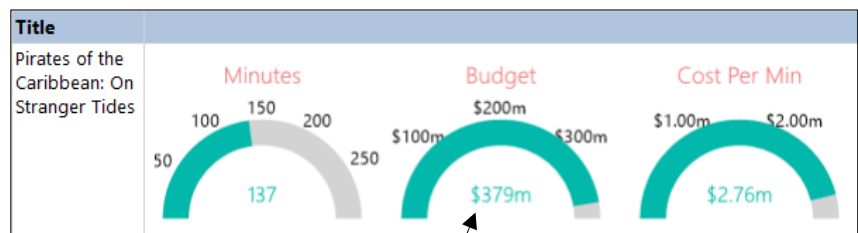
### 1.1 What is SQL Server Report Builder?

*SQL Server Report Builder* allows you to create, manage and share reports. You can see examples of the types of reports you can create in the diagram below:



**Akira Kurosawa**

Title	Run Time	
Seven Samurai	207	↑
Kagemusha	180	↑
Ran	162	→
Ikiru	143	→
The Hidden Fortress	139	→
Throne of Blood	110	↓
Yojimbo	110	↓
Sanjuro	95	↓
Rashomon	88	↓



You can add *parameters* to a report to allow users to control what data they see.

Even a boring table can become exciting by adding interactive elements to it.

Australia		
Brazil		
Title	Release Date	Run Time
City of God	30/08/2002	130
<b>Total</b>		<b>130</b>
Canada		

Choose director: Steven Spielberg

Choose film: Raiders of the Lost Ark

1 of 1

**Cast list for Raiders of the Lost Ark**

Role	Actor
Indiana Jones	Harrison Ford
Sallah	John Rhys-Davies
Satipo	Alfred Molina
Marion Ravenwood	Karen Allen
Special vocal effects	Frank Welker
Dr. Marcus Brody	Denholm Elliott

## Related Software

Report Builder is just one of many applications in the *Microsoft SQL Server* suite of software. You can see an overview of some of the software mentioned in this manual in the table below:

Name	Description
<i>SQL Server</i>	The core component of the SQL Server suite of software. This comprises the <i>database engine</i> which deals with storing and serving large volumes of data for applications designed by developers.
<i>SQL Server Management Studio</i>	An application for creating and managing SQL Server databases and various other associated objects.
<i>SQL Server Configuration Manager</i>	A tool for controlling which components of a SQL Server are running.
<i>SQL Server Reporting Services</i>	The <i>report server</i> component of SQL Server which deals with storing reports and serving them to applications or users who request them.
<i>Reporting Services Configuration Manager</i>	A tool for configuring the various aspects of a report server.
<i>Visual Studio</i>	Microsoft's flagship development tool which allows you to create many different types of applications and projects.
<i>SQL Server Data Tools</i>	A set of templates for Visual Studio which allows you to create and deploy SQL Server Reporting Services reports.
<i>SQL Server Report Builder</i>	A simple desktop application for creating SQL Server Reporting Services reports.
<i>Reporting Services Web Portal</i>	A web-based application for viewing and managing reports that have been deployed to a report server.



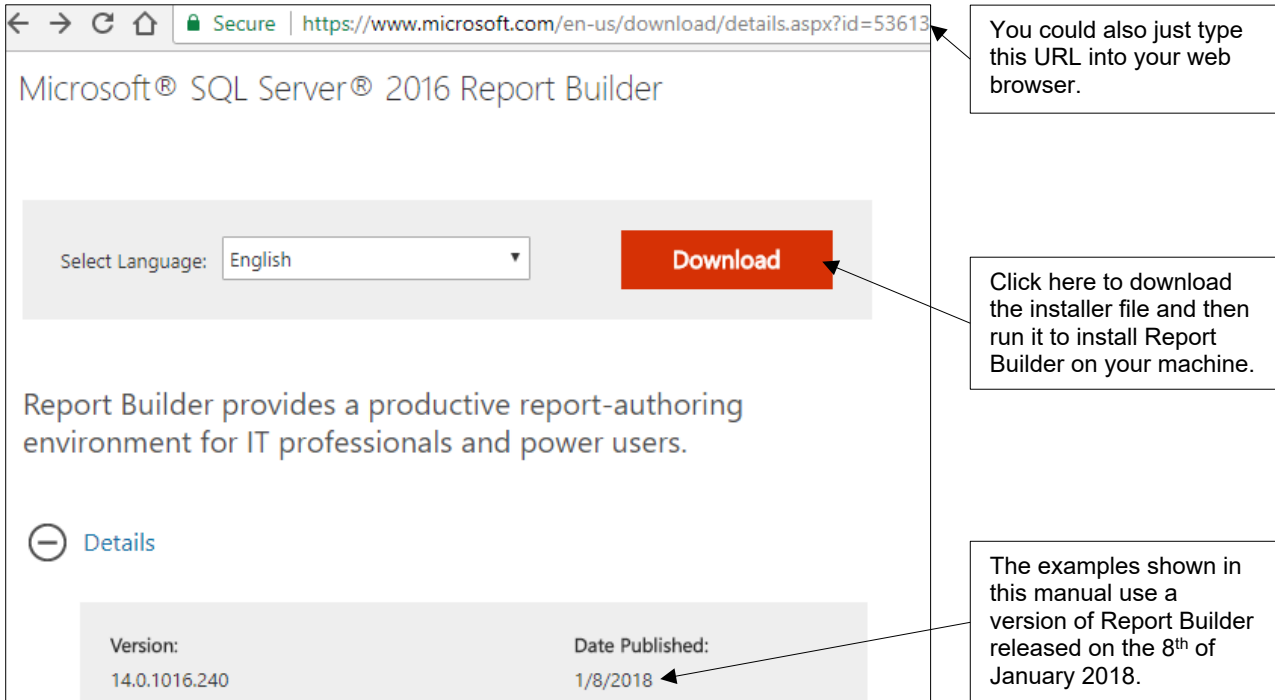
*This manual assumes that you're a report author rather than a SQL Server developer and so you won't need to use many of the applications mentioned in the table above. It can be handy to understand how everything fits together however!*

## 1.2 Installing Report Builder

You can install Report Builder from a couple of locations, as described in this section.

### Installing from the Microsoft Website

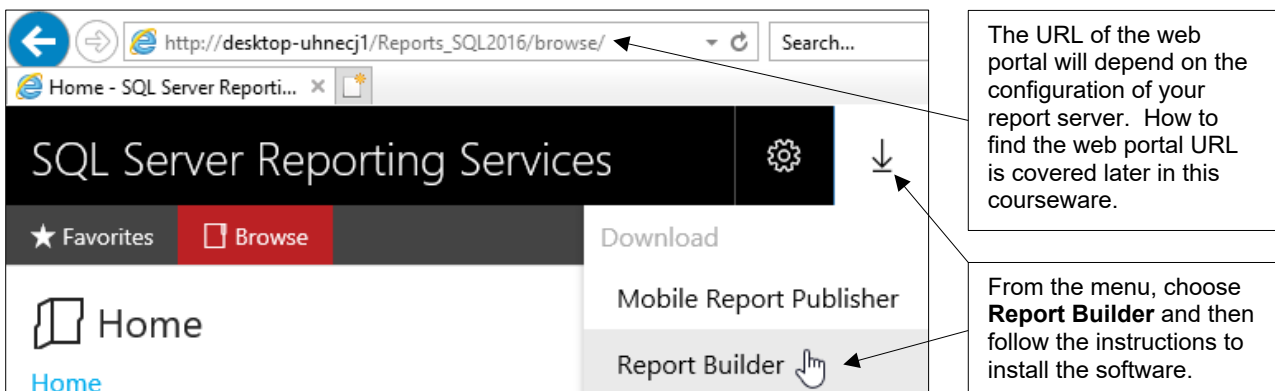
You can use a search engine to find the Microsoft download page for Report Builder:



The screenshot shows the Microsoft website page for downloading SQL Server 2016 Report Builder. The browser address bar shows the URL: <https://www.microsoft.com/en-us/download/details.aspx?id=53613>. The page title is "Microsoft® SQL Server® 2016 Report Builder". Below the title, there is a "Select Language:" dropdown menu set to "English" and a prominent red "Download" button. A callout points to the URL in the address bar, stating: "You could also just type this URL into your web browser." Another callout points to the "Download" button, stating: "Click here to download the installer file and then run it to install Report Builder on your machine." Below the download section, there is a "Details" link with a minus icon. At the bottom, a table shows the "Version: 14.0.1016.240" and "Date Published: 1/8/2018". A callout points to the date, stating: "The examples shown in this manual use a version of Report Builder released on the 8<sup>th</sup> of January 2018."

### Installing from the SSRS Web Portal

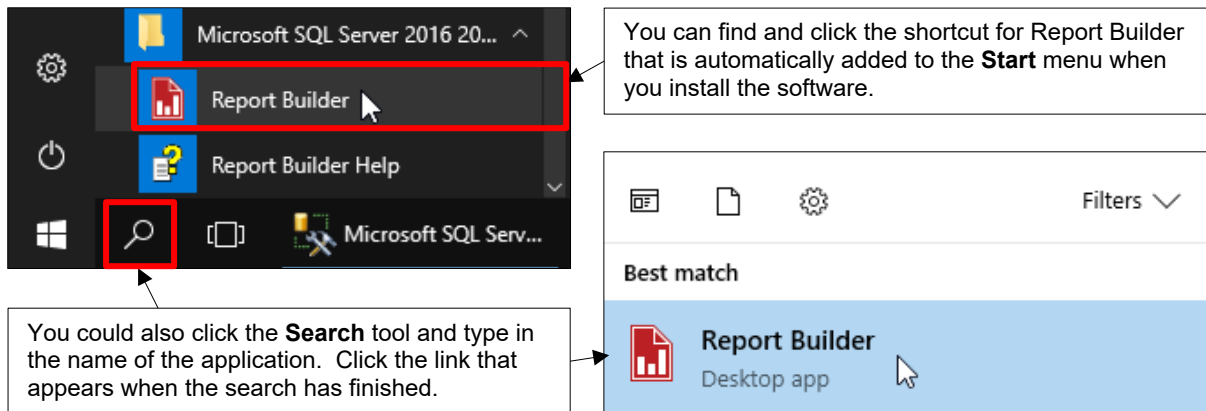
The *Reporting Services Web Portal* runs in a web browser and allows you to view reports that you've saved to a *Report Server*. You can also install Report Builder from the web portal:



The screenshot shows the SQL Server Reporting Services Web Portal in a web browser. The address bar shows the URL: [http://desktop-uhnej1/Reports\\_SQL2016/browse/](http://desktop-uhnej1/Reports_SQL2016/browse/). The page has a dark header with "SQL Server Reporting Services" and a gear icon. Below the header, there is a navigation bar with "Favorites" and "Browse" buttons. A "Download" button is visible, and a callout points to it, stating: "The URL of the web portal will depend on the configuration of your report server. How to find the web portal URL is covered later in this courseware." Below the navigation bar, there is a "Home" link with a folder icon. A dropdown menu is open, showing "Mobile Report Publisher" and "Report Builder". A callout points to the "Report Builder" option, stating: "From the menu, choose **Report Builder** and then follow the instructions to install the software."

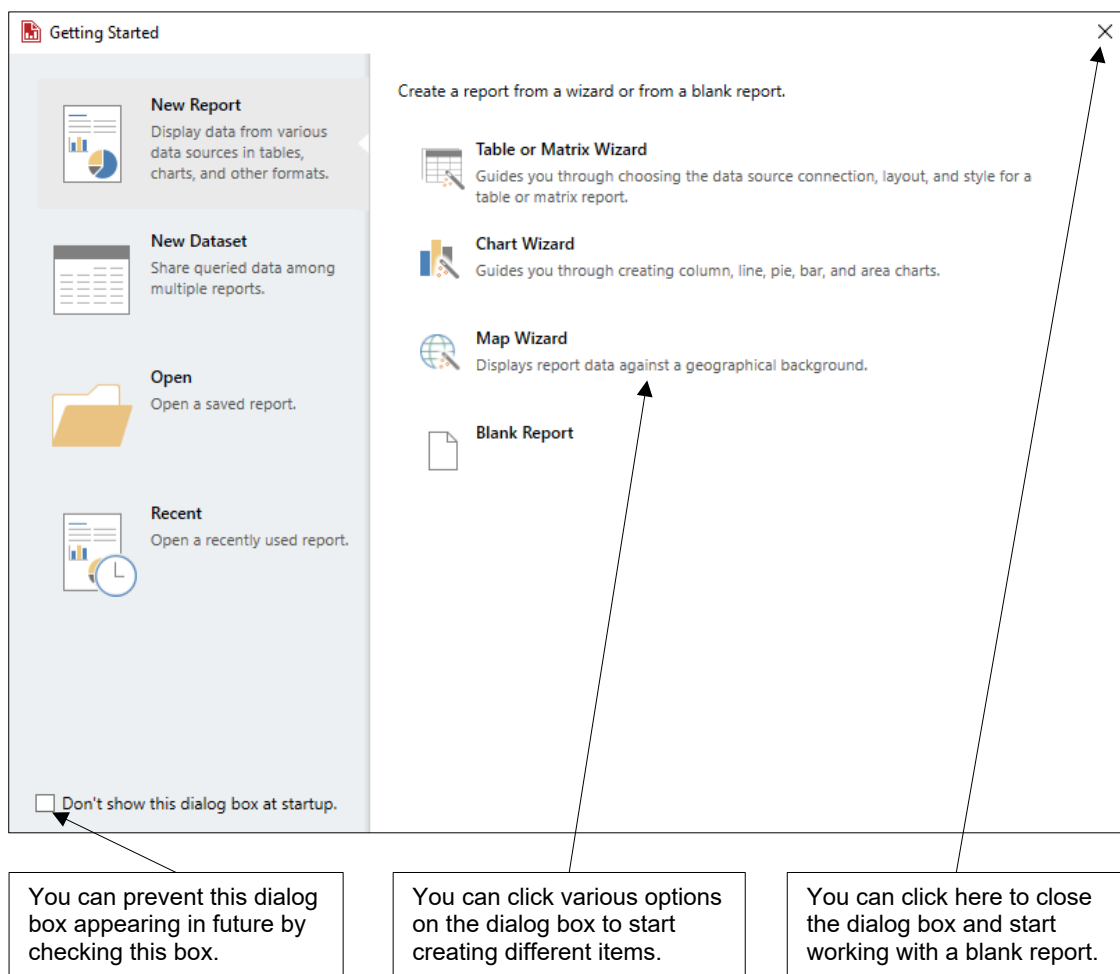
## 1.3 Running Report Builder

Once you've installed it, you can run Report Builder from the **Start** menu:



### The Getting Started Dialog Box

By default, Report Builder displays the **Getting Started** dialog box when you open the application:



## 1.4 The Report Builder Screen

Report Builder has several views and windows that you'll use when creating reports. You can see an overview of the screen in which you'll spend most of your time in the diagram below:

The screenshot shows the Microsoft SQL Server Report Builder interface. The title bar reads "Untitled - Microsoft SQL Server Report Builder". The ribbon includes tabs for File, Home, Insert, and View. The Home tab is active, showing groups for Views, Clipboard, Font, Paragraph, Border, Number, and Layout. The File menu is highlighted with a red box. The Home tab's Font group is also highlighted with a red box. The top-right corner of the window has a red box around the close button (X). The left pane shows the "Report Data" task pane with a tree view containing Built-in Fields, Parameters, Images, Data Sources, and Datasets. The main report area is a large white rectangle with a dashed border, containing the text "Click to add title" and a small box labeled "[&ExecutionTime]". Below the main area are sections for Row Groups and Column Groups. The bottom status bar shows "No current report server. Connect" and a zoom slider set to 100%. The zoom slider is highlighted with a red box.

The **File** menu contains options for opening, saving and creating new reports.

The **Home** tab of the ribbon has a variety of options for formatting and editing parts of your report.

You can close Report Builder by clicking the cross in the top-right corner of the window.

You may see a number of windows and panels around the border of the main Report Builder window. The next page describes these windows.

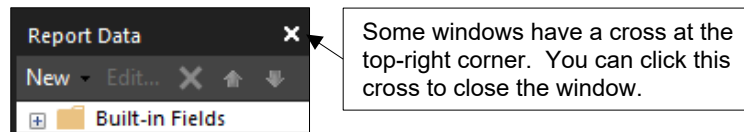
The main part of the screen is taken up by the report you're currently working on.

These buttons allow you to run the report and switch back to the design view.

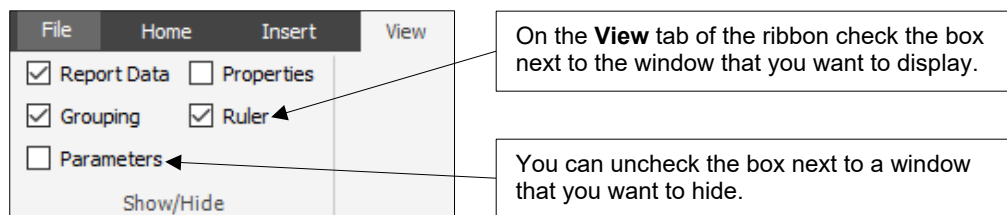
You can zoom in and out on the report using this slider.

## Opening and Closing Windows

Report Builder has several windows and panels that you can open and close as and when you need them.


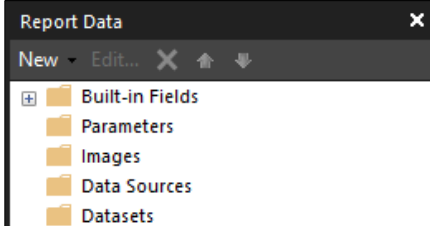

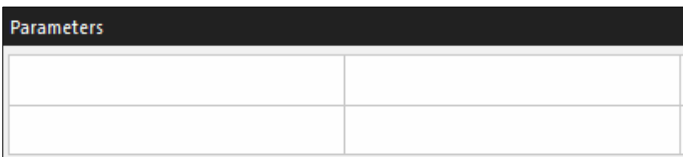


To reopen any windows that you've closed, choose **View** from the ribbon and select the window that you want to display.



## The Main Windows

You can see a description of the main windows and panels in the table below:

Name	What it's for	What it looks like
<i>Properties</i>	Displays the attributes of any object that you have selected. You can change these properties to alter the object in various ways.	
<i>Report Data</i>	Allows you to create connections to data sources and queries to retrieve data that will be displayed in the report.	
<i>Grouping Pane</i>	Allows you to control how the selected report item is grouped.	
<i>Parameters Pane</i>	Allows you to create and edit report parameters.	

## 1.5 Using a Report Server

In Report Builder you can work with reports that are stored locally on your machine as well as files stored centrally on a report server.



Connecting to a report server means that you can save your reports in a location that other people can see. You can also access other shared resources such as data sources and datasets, which can make building reports much easier!

### Connecting to a Report Server

To use files on a report server you first need to connect to it:

a) At the bottom of the Report Builder window, click **Connect**.

b) Ask your friendly SQL Server administrator for the URL of the report server and enter it here.

c) Click **Connect** to connect to the report server.

### Setting a Default Report Server

You can set a default report server so that you don't have to manually choose to connect to one each time you open Report Builder. To do this, from the ribbon select **File | Options**

On the **Settings** page of the dialog box that appears, enter the report server URL into this box and then click **OK**



## Finding the URL of the Report Server

If you don't have a SQL Server administrator to ask, and you have access to the report server, you can locate its URL in the **SQL Server Management Studio** application.

**Best match**

**SQL Server Management Studio**  
Desktop app

a) If you have the application installed, in the **Start** menu right-click on it and choose **Run as Administrator**.

b) Choose a **Reporting Services** server and select or enter its name.

c) Click here to connect to the server.

**Connect to Server**

SQL Server

Server type: Reporting Services

Server name: .SQL2016

Authentication: Windows Authentication

User name: WISEOWL\Andrew.Gould

Password:

☐ Remember password

Connect Cancel Help Options >>

**Object Explorer**

Connect

.SQL2016 (Re)

Connect... Disconnect Policies Facets Reports Refresh Properties

**Select a page**

General Execution History Logging Security Advanced

Script Help

Name: SQL Server Reporting Services

Version: Microsoft SQL Server Reporting Services Version 13.0.44

Edition: Developer

Authentication Mode: Windows Authentication

URL: http://DESKTOP-UHNECJ1:80/ReportServer\_SQL2016

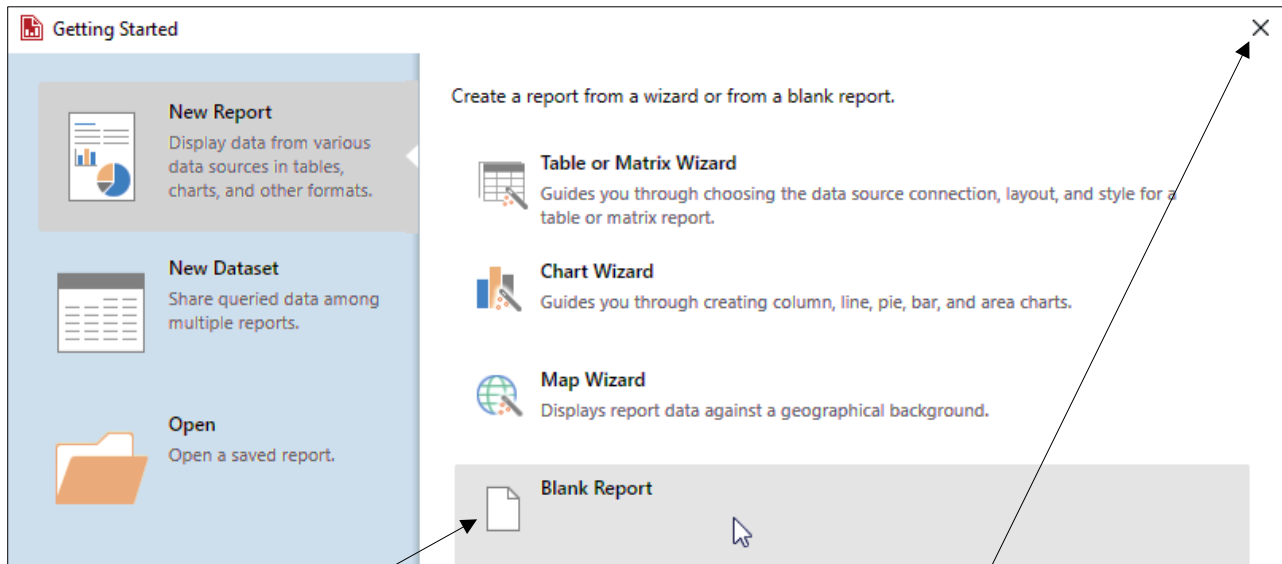
d) Right-click the server at the top of the **Object Explorer** window and choose **Properties**.

e) On the **General** page of the dialog box which appears you can copy the report server URL from this text box.

## CHAPTER 2 - WORKING WITH REPORTS

### 2.1 Creating Reports

The easiest way to create a new report is simply to open Report Builder:



If the **Getting Started** dialog box appears when you open Report Builder, click **Blank Report** to create a new report.

You can also close the dialog box to see the blank report that is created automatically when you open Report Builder.

### Choosing to Create a New Report

You can also create a new report when Report Builder is open:

Ribbon	Keyboard
<b>File   New</b>	<b>Ctrl + N</b>



*You can only have one report open at a time in Report Builder. Creating a new report will automatically close the one you're working on (prompting you to save it if necessary).*

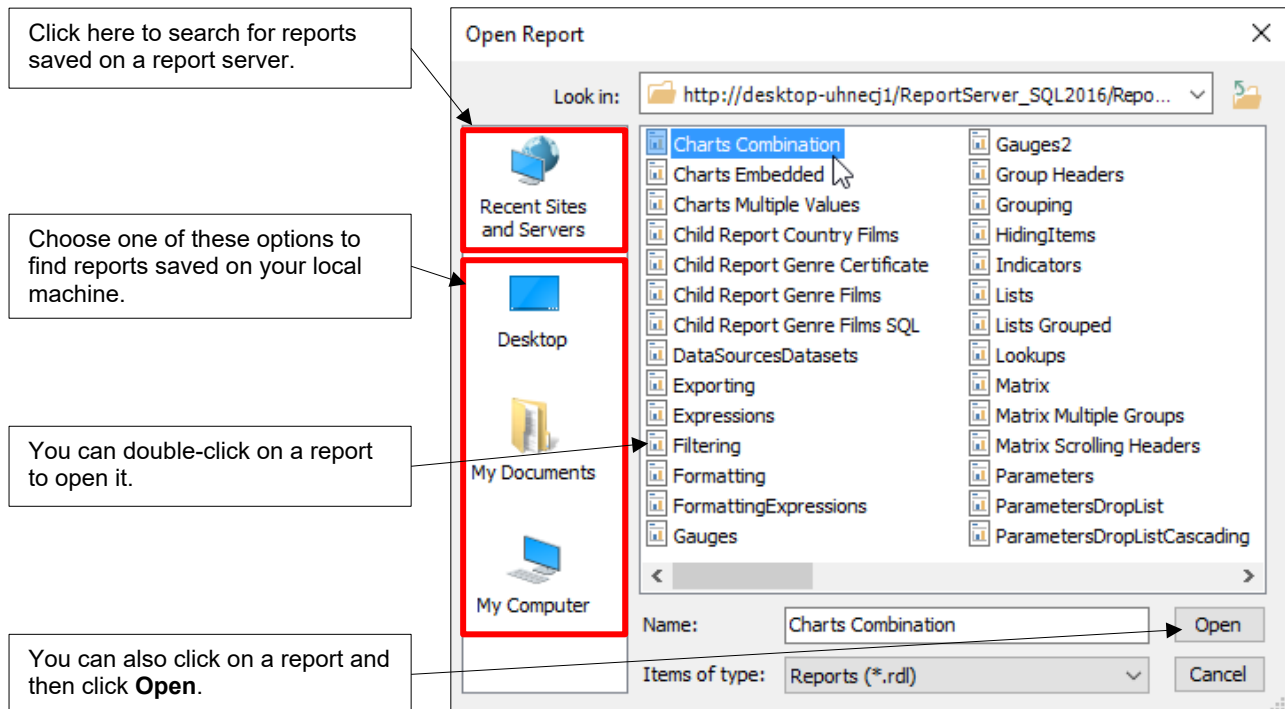
## 2.2 Opening and Closing Reports

### Opening Existing Reports

To open an existing report:

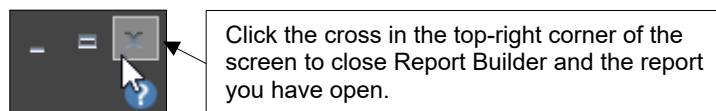
Ribbon	Keyboard
<b>File   Open</b>	<b>Ctrl + O</b>

You can then browse for the report you want to open on the dialog box which appears:



### Closing a Report

You can close a report by closing Report Builder.




## 2.3 Saving Reports

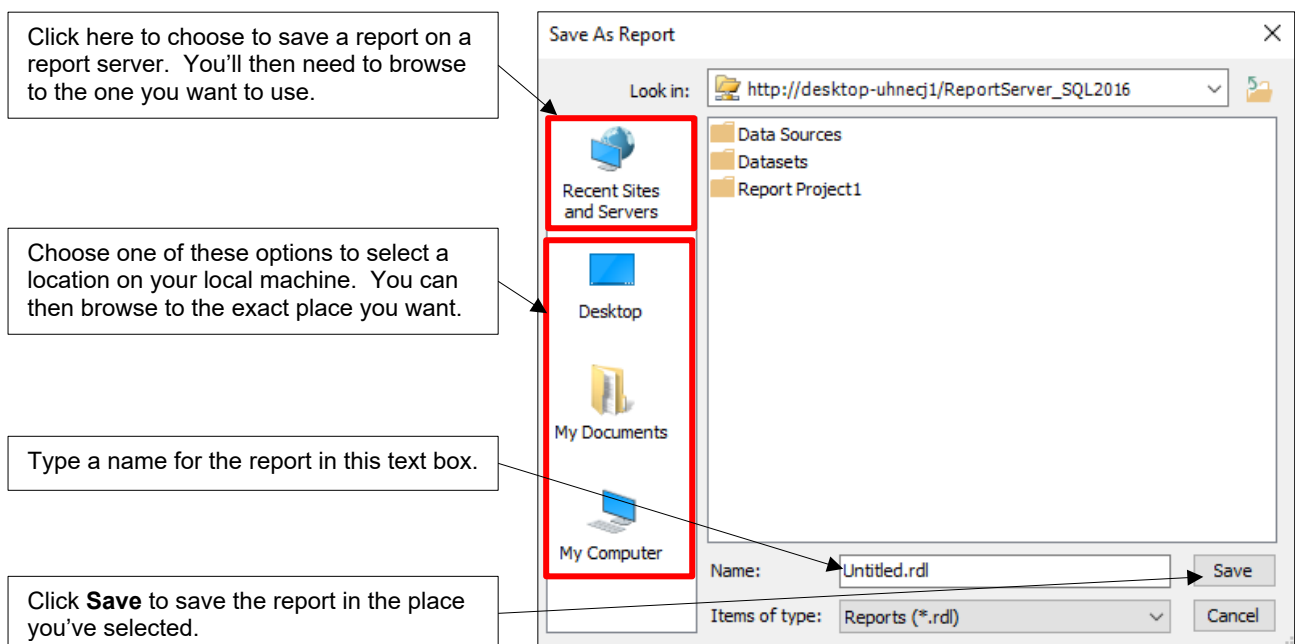
You can save a report to either your local machine or to a report server.

### Saving a Report

To save a report that you're working on:

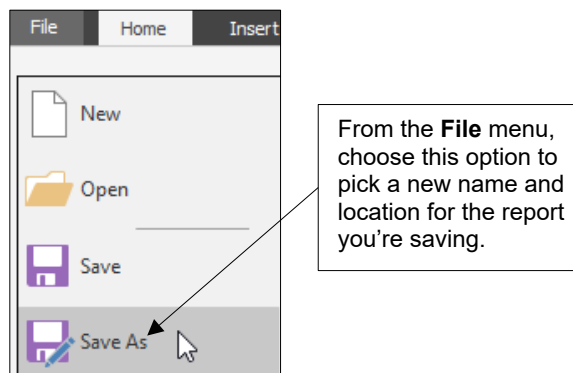
Ribbon	Keyboard	Toolbar
<b>File   Save</b>	<b>Ctrl + S</b>	

If you've previously saved the report it will be saved with the same name in the same location. If this is the first time you've saved the report, you'll be asked where you'd like to save it:



### Saving a Report with a New Name

If you'd like to save a report that you've previously saved with a new name or in a new location you can do so by choosing **File | Save As** from the ribbon:

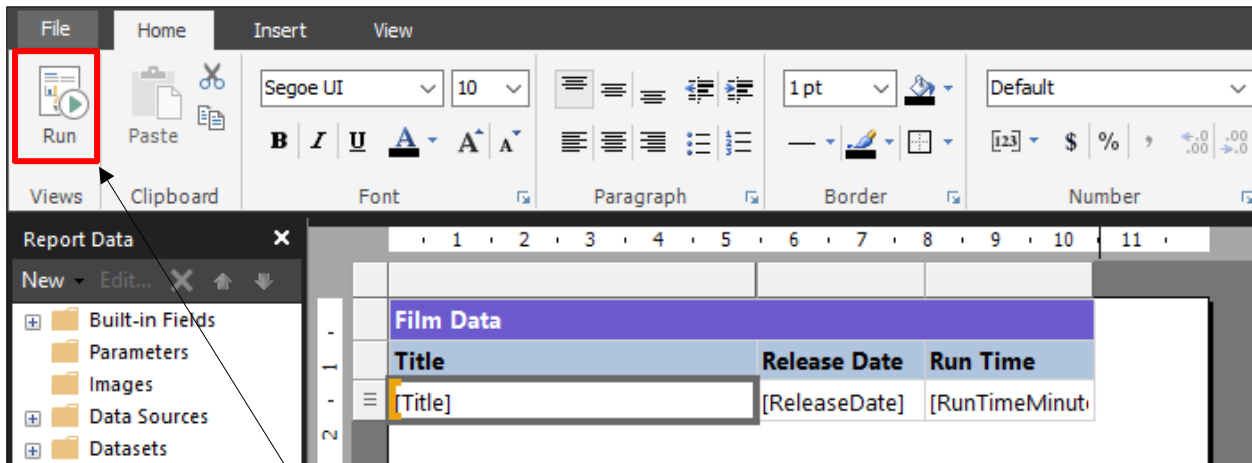


## 2.4 Running Reports

Your reports look different when you're creating them compared to when you run them. You'll need to switch between *design view* and *preview* to check that the report looks sensible.

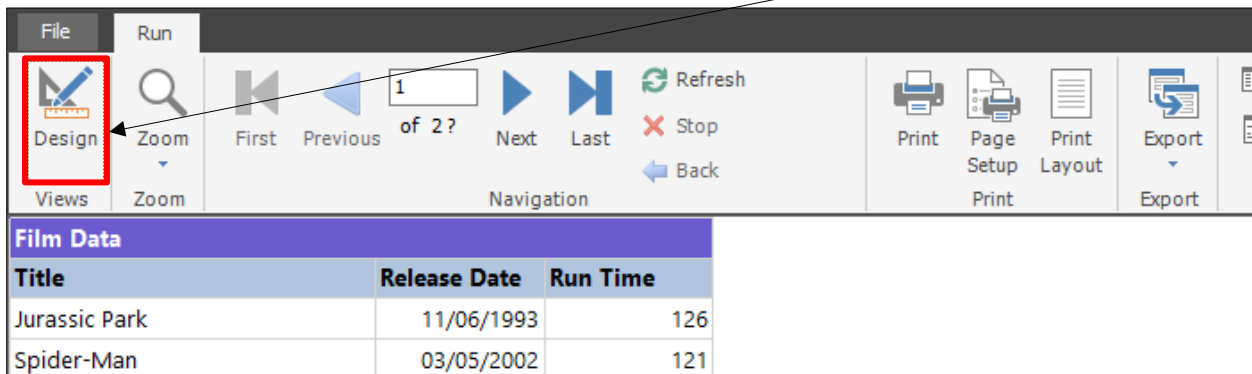
### Design View and Report Preview

When you create a report it will automatically open in design view. This is where you'll spend most of your time as a report author. You can switch a report to a preview to running it.



In design view you can make changes to the report's appearance. To see what it looks like, click **Run** to switch to the report preview.

In preview you can see the report's data (and print or export it if you want to). You can click **Design** to return to design view and make further changes.



You can switch between design view and preview using two buttons in the bottom-right of the Report Builder window.

Use these buttons to switch views.



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














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		Basic training	Advanced training	Systems / consultancy
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	VBA macros			
	Office Scripts			
	Microsoft Access			
Power BI, etc	Power BI and DAX			
	Power Apps			
	Power Automate (both)			
SQL Server	SQL			
	Reporting Services			
	Report Builder			
	Integration Services			
	Analysis Services			
Coding	Visual C#			
	VB programming			
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