

# Creating Reports with Report Builder

Presented by:  
**Charles Allen**  
BKD Technologies  
Managing Consultant

# Introduction – Charles Allen



- Managing consultant
- More than 20 years experience
- Microsoft MVP

# What You Will Learn

What you will learn in this webinar

- What Report Builder is
- Accessing Report Builder
- How Report Builder Works with GP
- Creating Data Sets
- Creating Reports
- Q&A

# What Report Builder Is

- A tool for creating reports for SQL Server Reporting Services
- A tool for creating ad-hoc queries of the data

# What Report Builder Is

- Was first introduced with SQL Server 2005 as Report Builder 1.0
- Report Builder 2.0 was rewritten for SQL Server 2008
- Report Builder 3.0 was released with SQL Server 2008 R2

# What Report Builder Is

## Features of Report Builder 3

- “Grab and Go” reporting experience enabled through the Report Part Gallery
- Support for maps and geospatial visualizations with integration to Bing maps and support for SQL spatial data types.
- Additional visualizations including indicators, sparklines and data bars
- Support for consuming SharePoint lists and PowerPivot models as data sources
- Support for Madison and SQL Azure data sources
- Render any report as a data source to PowerPivot or other applications through ATOM data feeds

# What Report Builder Is

Report Builder enables you to do the following:

- Add text and formatting to reports
- Create new fields and calculations
- Preview, print, and publish reports
- Explore data
- Modify existing SSRS reports

# Accessing Report Builder

## Prerequisites

- You must have the Enterprise, Standard, Developer, or Evaluation version
- The client computer must have Microsoft .Net Framework 2.0 installed
- The client computer must have IE 6.0 or later

# Accessing Report Builder

## Security

- Users assigned to the System User and Browser roles can view published Report Builder reports on a report server, without having to launch Report Builder.
- Users assigned to the System User and Report Builder roles can generate models, start Report Builder and create reports, and save reports to the report server.
- Users assigned to the System User and Publisher roles can publish models from Model Designer to the report server. Models are used as data sources in Report Builder.
- Users assigned to the System Administrator and Content Manager roles have full permissions to create, view, and manage Report Builder reports.

# Accessing Report Builder

- Go to the Report Manager website

*http://<ReportServer>/reports*

Go to the application directly

*http://<ReportServer>/reportserver/reportbuilder/reportbuilder.application*

# Accessing Report Builder

- Report Builder 1

*http://<servername>/ReportServer/ReportBuilder/ReportBuilder.application*

- Report Builder 3

*http://<servername>/ReportServer/ReportBuilder/ReportBuilder\_3\_0\_0\_0.application*

# How Report Builder Works with GP

- Modify existing SSRS reports shipped with GP
- Create new SSRS reports for GP
- Edit metrics shipped with SSRS from the GP home page
- Export SSRS reports or print them directly from SQL Server Reporting Services report lists

# Creating Data Sets

- A data source is a connection to the database, similar to an ODBC connection
- A dataset is a collection of rows and columns pulled from a data source

# Creating Reports

- Reports are created in Report Builder
- Reports can be deployed to the SQL Server Reports Manager web site
- Reports can be run without being saved for ad-hoc reports

# Creating Reports

Reports can be built using the following data elements

Tables

Views

Stored Procedures

Table-valued Functions

Report Models

# Creating Reports

## Report Models

Provide a nontechnical user with a set of data that hides the complexities and enables the user to create a report without having to learn SQL commands or tables

# Where to Get More Information

- BKD Technologies - 877.253.7778 or [gpsupport@bkd.com](mailto:gpsupport@bkd.com)
- System User's Guide for Dynamics GP
- <http://www.microsoft.com/sqlserver/en/us/solutions-technologies/business-intelligence/reporting-services.aspx>
- <http://msdn.microsoft.com/en-US/sqlserver/cc511478.aspx>

# BKD Technologies Support Center

- Monday - Friday, 8 a.m. - 5 p.m., call our Support Center toll free at:
- **Dynamics GP - 877.253.7778**  
[GPsupport@bkd.com](mailto:GPsupport@bkd.com)

# Stay Connected

dynamicsGPinsights.com

At **Dynamics GP Insights** you can read articles, watch webinars & join the conversation!

The screenshot shows the DynamicsGPinsights.com website. At the top, there is a search bar and navigation links for HOME, WEBINARS, ABOUT US, and CONTACT US. Below the navigation is a banner image of three green frogs on a log. The main content area features a list of articles with titles, author names, and dates. The articles listed are:

- Microsoft Dynamics GP and Windows Remote Desktop Services (RDS) – Part 2
- Microsoft Dynamics GP and Windows Remote Desktop Services (RDS) – Part 1
- Not Perfect? Adjusting 1099 Totals in Dynamics GP
- What is the Database Maintenance Utility for GP 2010?
- Creating User-Defined Functions to Retrieve/Update Third Party Forms
- SQL Server Reporting Security
- Business Analyzer in GP 2010 R2
- Forecaster Data Transfer Tool
- Do You Need the Very Model of a Modern Major Report?
- Using SQL Views from Microsoft

On the right side of the page, there is a 'STAY CONNECTED' section with links to follow on Twitter, watch on YouTube, and subscribe via RSS. Below this is a 'Subscribe today' banner and a 'Recent Comments' section. At the bottom of the page, there is a copyright notice for 2011 and the 'experience BKD' logo.

Follow us on Twitter

Join us on LinkedIn

View videos at YouTube

# Next Webinar

- **Topic:** Security in Dynamics GP
- **Date:** September 22, 2011
- **Register at:** [www.bkdtechnologies.com/attend](http://www.bkdtechnologies.com/attend)

# Contact Info

**Charles Allen**  
**BKD Technologies**  
713.499.4629  
[callen@bkd.com](mailto:callen@bkd.com)

**Thank You For Attending Our Webinar**

