

USER GUIDE

BI SERVICE

REFERENCES

This guide is part of ThorApps - BI Service product documentation. We encourage you to click through the links below to learn about using the BI Service app:

1. [Installation Guide](#)
2. [Environment Setup Guide](#)
3. [Quick Start Guide](#)
4. User Guide (this document)
5. [Purchasing Guide](#)
6. [Uninstall Guide](#)

OVERVIEW

In this guide you will:

- [Create SSRS reports \(SQL Server Reporting Services\) on Report Builder](#)
- [Publish SSRS reports to ThorApps - BI Service](#)
- [Create a new Shared Data Source](#)
- [Edit a published SSRS report to use the Shared Data Source](#)
- [Dashboard an SSRS report in a SharePoint Online app part](#)
- [Export and schedule your reports](#)

If you are an experienced user, you could complete the steps in less than 15 minutes. If it's your first time, maybe 45 minutes to an hour.

PREREQUISITES

To follow this guide, you will need the following items:

- A SharePoint Online site collection with ThorApps – BI Service App added
- Site Collection Administer rights in the Site Collection
- An understanding of basic SharePoint terminology and navigation

- Microsoft Report Builder or Visual Studio 2017 to create your reports
- SQL Server Data Tools (Optional)
- An internet accessible, SSRS compatible, Data Source

CREATE A SSRS REPORT WITH REPORT BUILDER

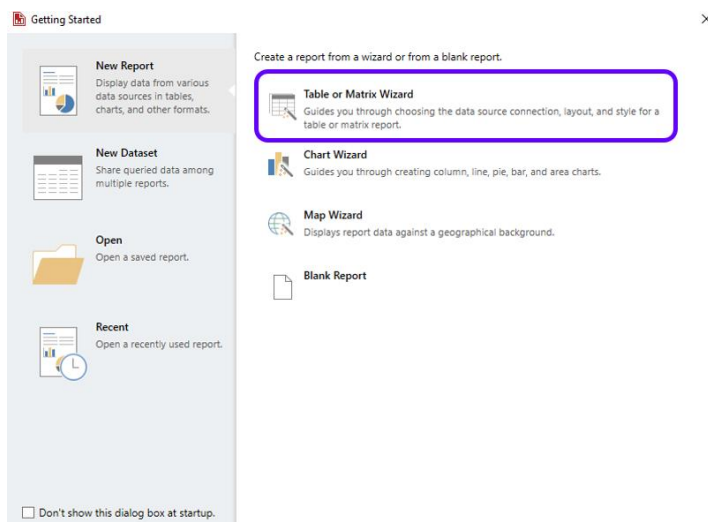
To begin we will demonstrate how to create an SSRS report using **Microsoft Report Builder** that can later be published to **ThorApps - BI Service** and accessible via SharePoint Online.

[Click here](#) to download and install Microsoft's "**Report Builder**" following the Microsoft installation instructions. More information on creating reports with **Microsoft Report Builder** can be found [here](#).

Once installed, open Report Builder and click "**File**".

Click "**New**".

Click "**Table or Matrix Wizard**".



Check **“Create a dataset”**.

Click **“Next”**.

New Table or Matrix ×

Choose a dataset

Choose a dataset

Choose an existing dataset in this report or a shared dataset

Browse...

Create a dataset

Help < Back **Next >** Cancel

Click **“New”**.

New Table or Matrix ×

Choose a connection to a data source

Choose a published data source, or create a connection for use only in this report.

Data Source Connections:

Browse... **New...** Test Connection

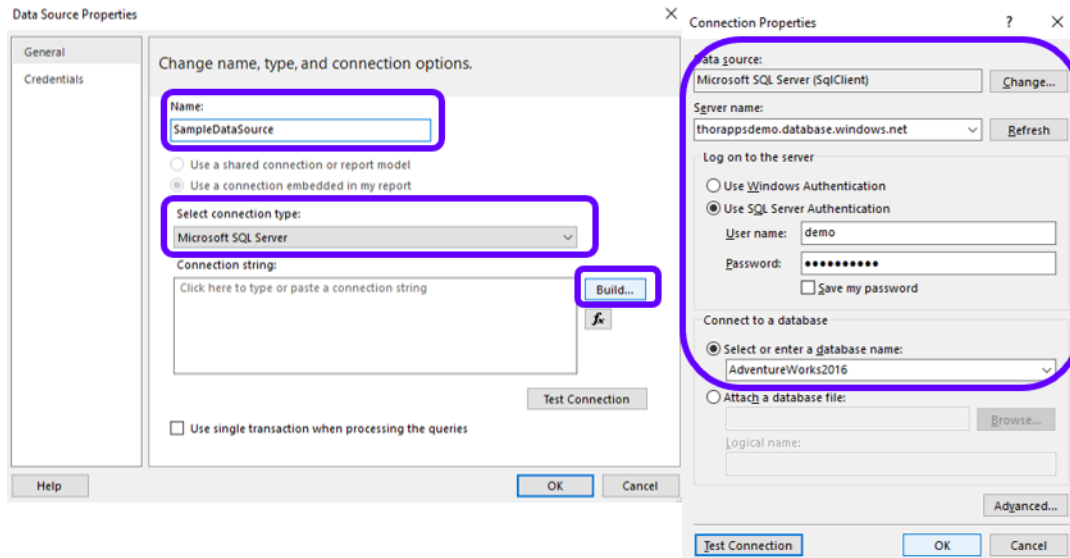
Help < Back **Next >** Cancel

Give the new data source a Name.

Select its connection type.

Click **“Build”**.

Enter the **Server** and **Database** name and credentials.



***IMPORTANT!** If you are using [ThorApps ListSync App](#) to get SharePoint data for your report, open the app and navigate to **Settings** (Cog on the upper right corner) > **Home** > **Environment Settings** > **Database**. You should use this information to fill the Connection Properties described above.

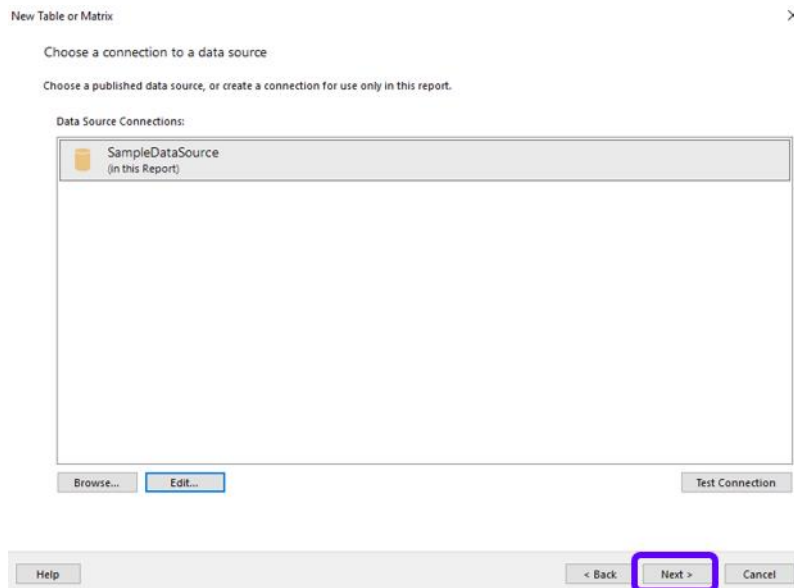
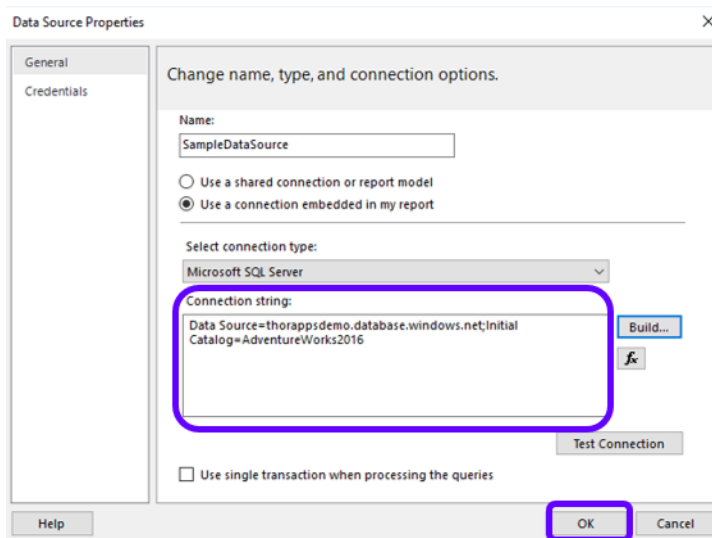
Click **“Test Connection”** to check connectivity.

Click **“OK”**.

This will have generated the connection string.

Click **“OK”**.

Click **“Next”**.



In the “**Database view**” pane on the left, navigate to the table containing the desired data.

Expand the table node and select the columns you want.

Click “**Next**”.

New Table or Matrix ✕

Design a query

Build a query to specify the data you want from the data source.

Field	Aggregate
PersonID	(none)
FirstName	(none)
LastName	(none)
JobTitle	(none)
BusinessEntityType	(none)

Parameter Name	Value
PersonID	(null)

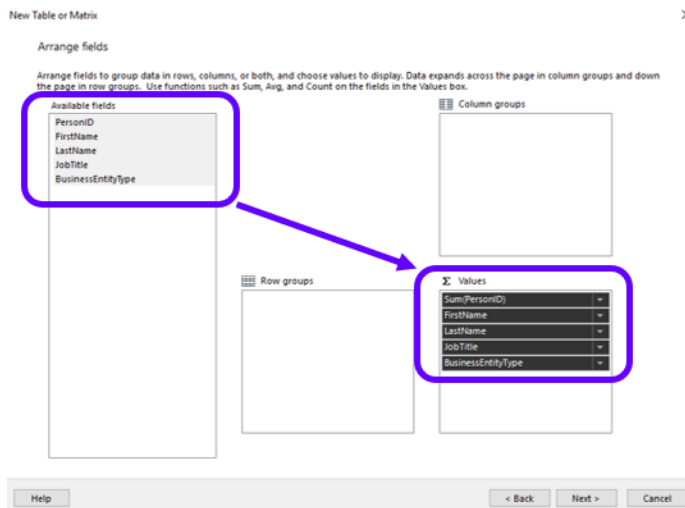
Query results

Help < Back **Next >** Cancel

Select all the desired fields.

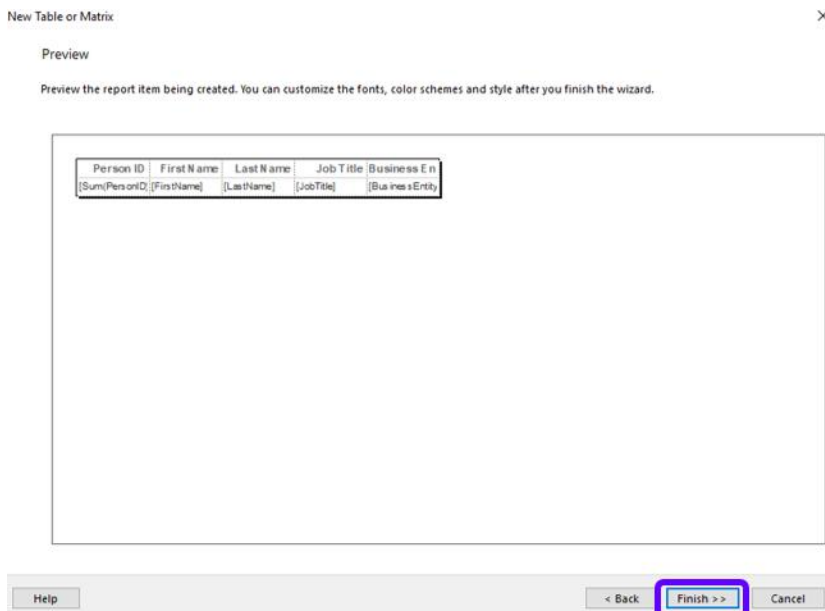
Drag and Drop them into the **Values** box.

Click **“Next”**.

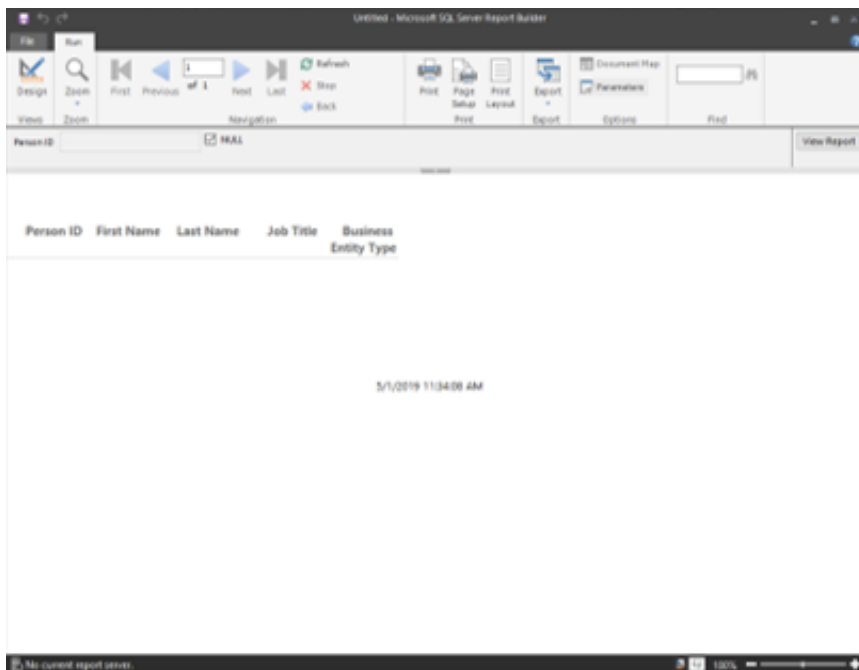
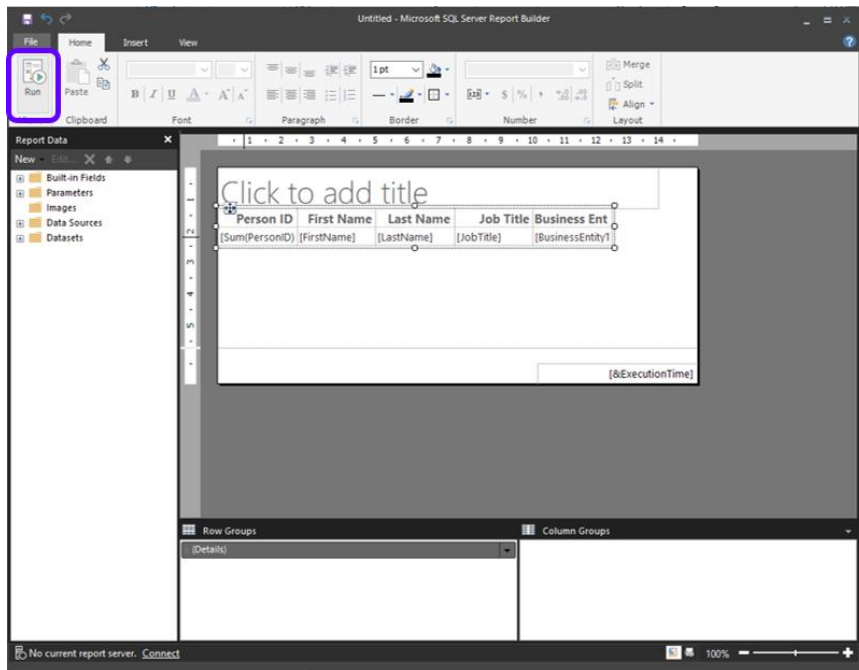


Click **“Next”**.

Click **“Finish”**.



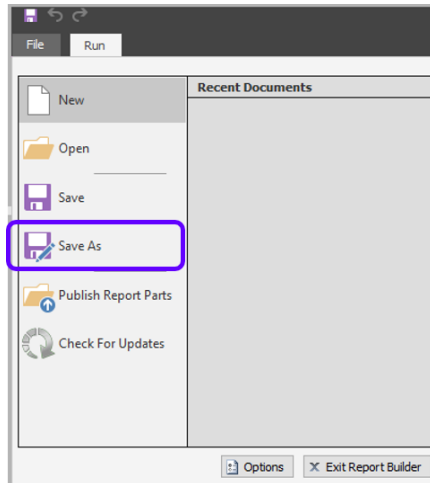
Click **“Run”** to test the report.



Click **“Design”** to return to the design page.

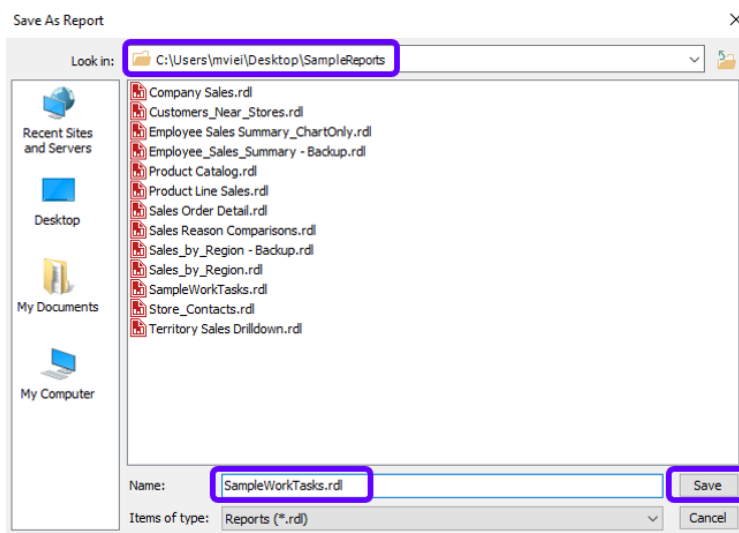
Click “File”.

Click “Save As”.



Give it a name and save it as an .rdl to a convenient location.

Click “Save”.



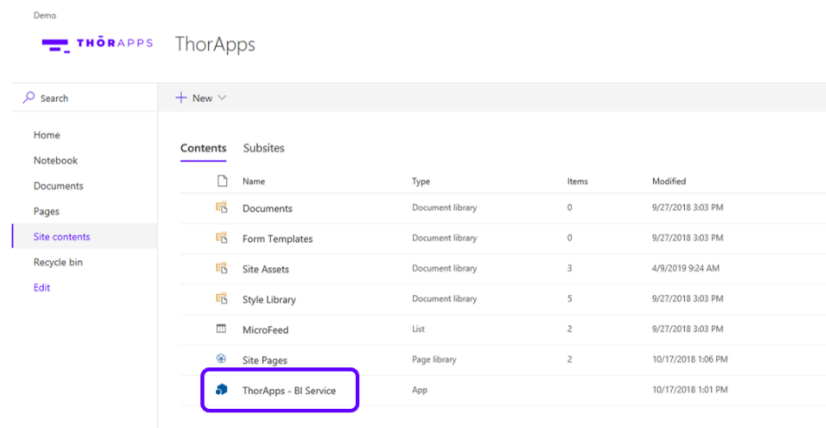
This has created a report with an embedded data source. However, embedded data sources create maintenance issues, especially when you need to update dozens or even hundreds of reports. We will edit the report to use a shared data Source instead once it is published to the **ThorApps – BI Service Report Library**.

PUBLISH AN SSRS REPORT TO THE THORAPPS – BI SERVICE REPORT LIBRARY

In a browser, navigate to the root of your site collection.

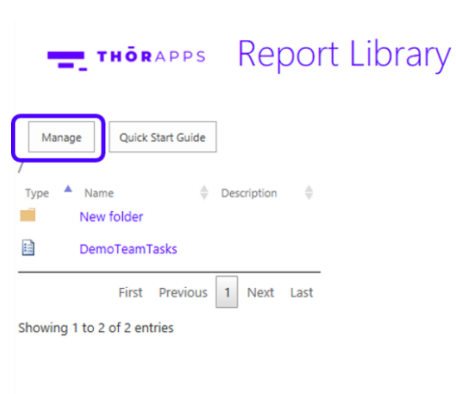
Click on the cog in the upper right and select “Site Contents”.

Click on “ThorApps - BI Service”.



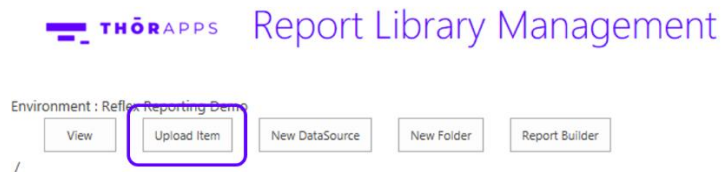
Click “Manage”.

IMPORTANT: If “Manage” is not visible, you are not a site collection administrator and do not have permission to manage report content.



You will now have buttons to manage your reports.

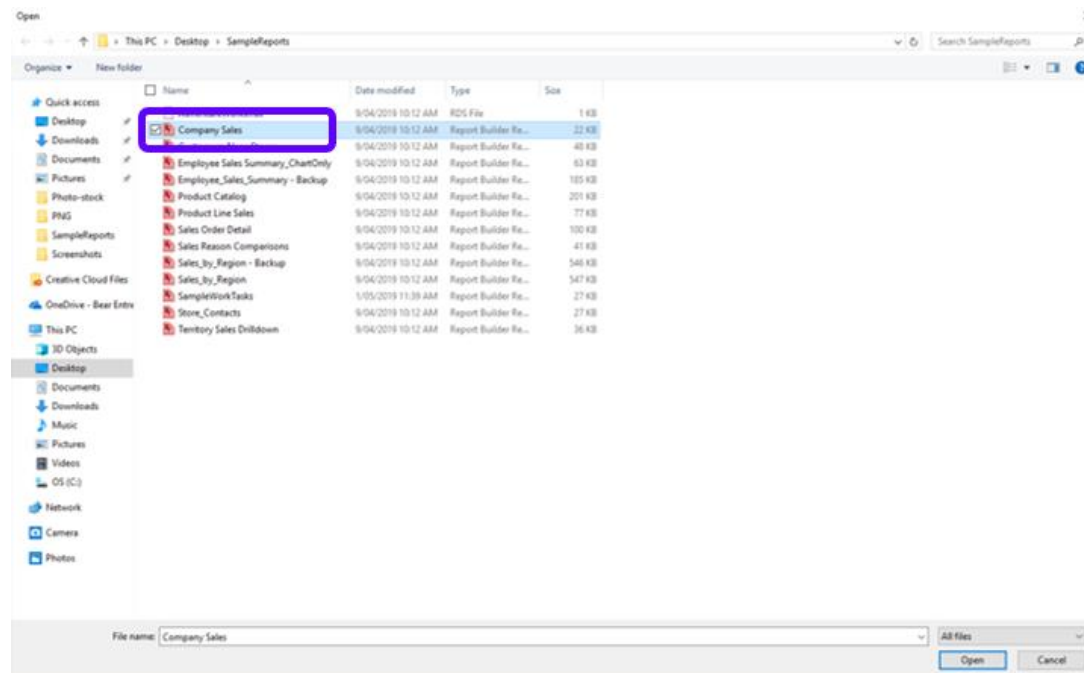
Click **“Upload Item”**.



Click **“Choose Files”**.

Locate the report files (.rdl) for the report you wish to publish.

Select it and click **“Open”**.



IMPORTANT: The report Data Source is NOT uploaded with Credentials, so you will need to re-enter them.

Click your **Data Source**.



Report Library Management

Environment : Root Testing

-
-
-
-
-

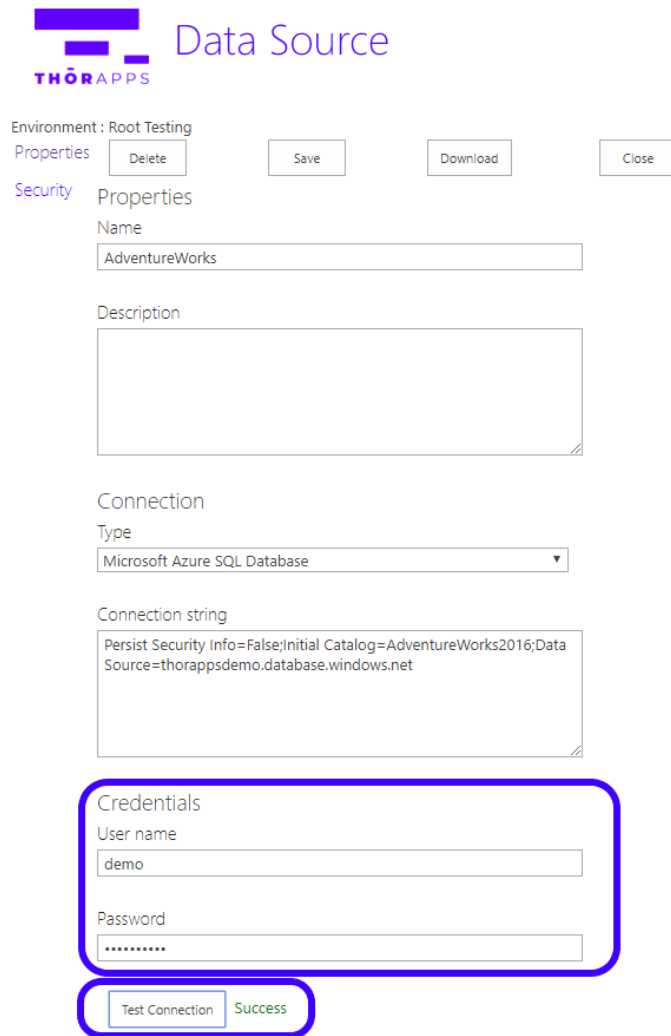
/

Type ▲	Name	Hidden ⇅	Description ⇅
	Customers_Near_Stores	No	
	Employee_Sales_Summary - Backup	No	
	Product Catalog	No	
	Employee Sales Summary_ChartOnly	No	
	Sales Reason Comparisons	No	
	Product Line Sales	No	
	Sales_by_Region	No	
	AdventureWorks	Yes	
	Sales Order Detail	No	
	Company Sales	No	

First Previous **1** 2 Next Last

Showing 1 to 10 of 11 entries

Enter the Credentials for the Data Source and click “Test Connection” to validate the new credentials.



THORAPPS Data Source

Environment : Root Testing

Properties

Security Properties

Name
AdventureWorks

Description

Connection

Type
Microsoft Azure SQL Database

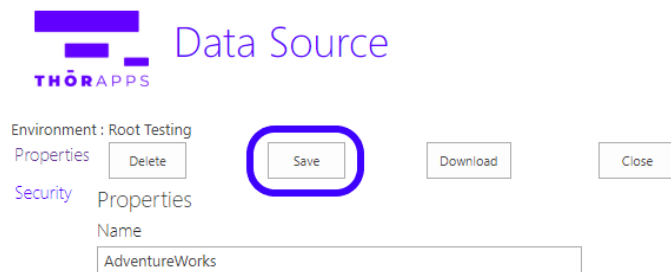
Connection string
Persist Security Info=False;Initial Catalog=AdventureWorks2016;Data Source=thorappsdemo.database.windows.net

Credentials

User name
demo

Password

Click “Save”.



THORAPPS Data Source

Environment : Root Testing

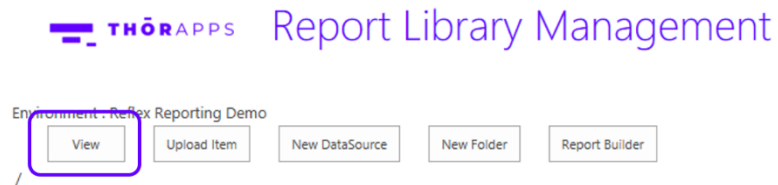
Properties

Security Properties

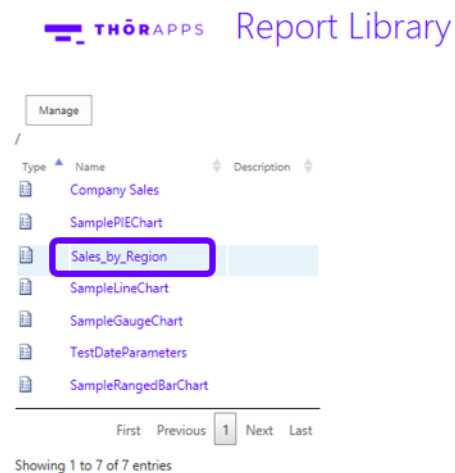
Name
AdventureWorks

Click “**View**” to return to the standard report library view.

Note the Data Sources are not visible in this view.



Click on your report from the list to test it renders correctly.



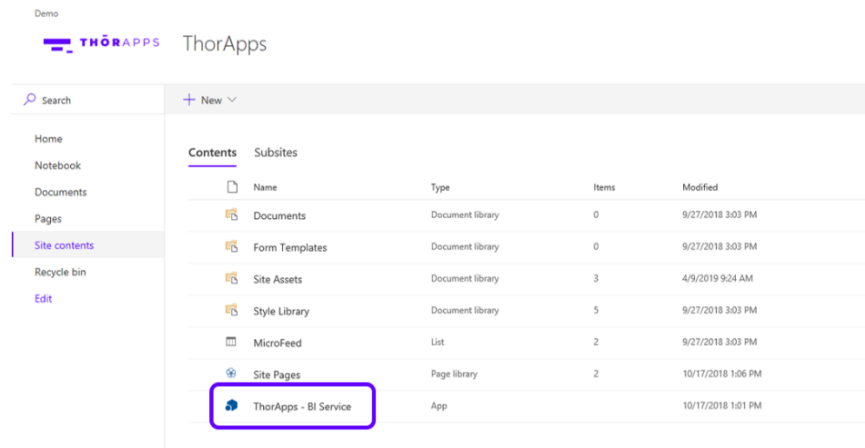
IMPORTANT: Reports created in Report Builder will have an embedded Data Source, rather than using a shared Data Source. This creates maintenance difficulties, and so should be edited to use shared Data Sources as described in the following sections.

CREATE A SHARED DATA SOURCE

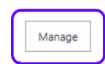
In a browser, navigate to the root of your site collection.

Click on the cog in the upper right and select **“Site Contents”**.

Click on **“ThorApps - BI Service”**.

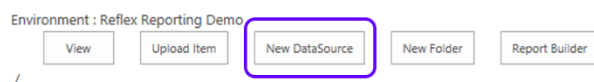


Report Library



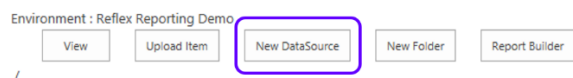
Click **“Manage”**.

Report Library Management



Click **“New DataSource”**.

Report Library Management

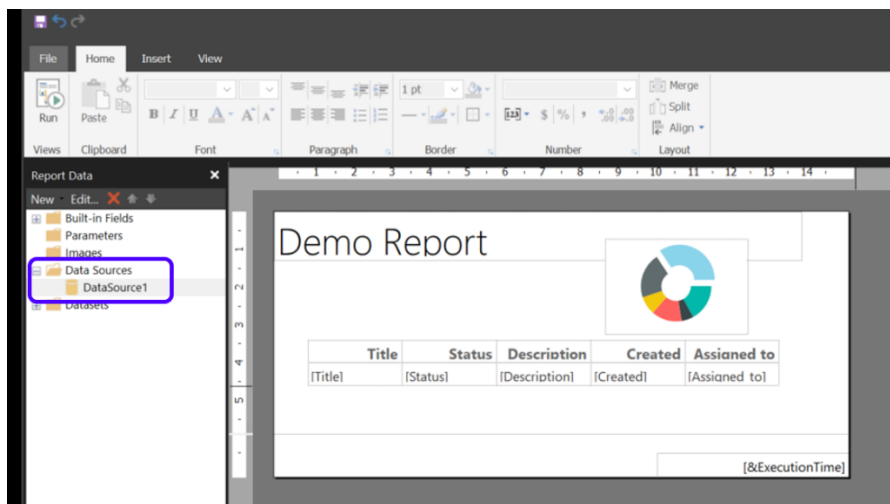


Give it a name, connection type and credentials.

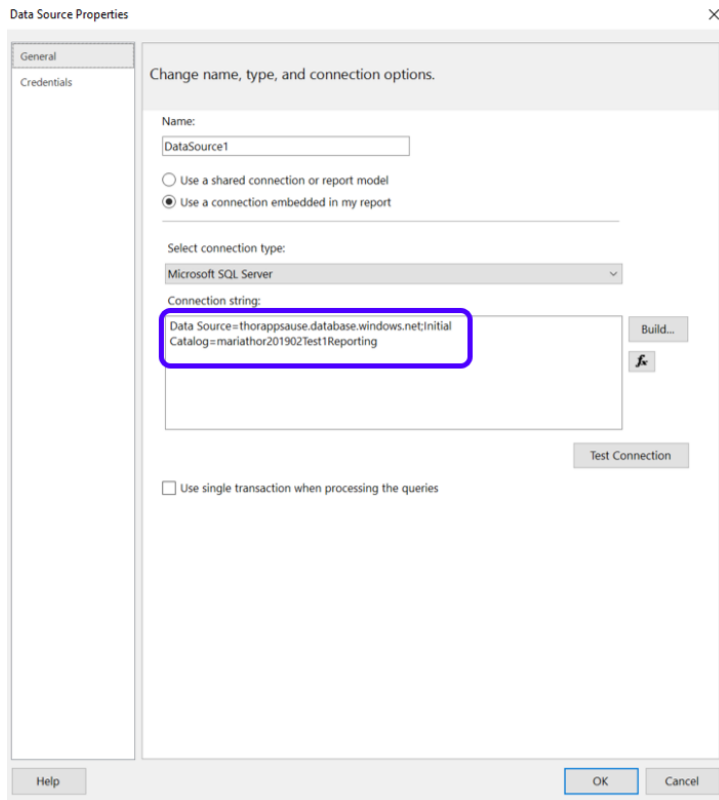
The screenshot shows the 'Data Source' configuration window in THORAPPS. The window title is 'THORAPPS Data Source'. It has a 'Properties' section with a 'Name' field containing 'ExampleSharedDataSource', a 'Description' text area, a 'Connection' section with a 'Type' dropdown set to 'Microsoft SQL Server', a 'Connection string' text area, and a 'Credentials' section with 'User name' set to 'demo' and a 'Password' field with masked characters. There are 'Save', 'Close', and 'Test Connection' buttons.

It will also need a connection string of course, so we need to generate one.

In **Report Builder**, click “**Data Sources**” and double-click your data source.



Copy the information from the **Connection string** box.



Return to your browser.

Paste the copied text onto the **Connection String** box.

Data Source

Environment : **Reflex Reporting Demo**

Properties

Properties

Name Name is required

Description

Connection

Type

Credentials

User name User name is required

Password Password is required

Click **"Save"**.

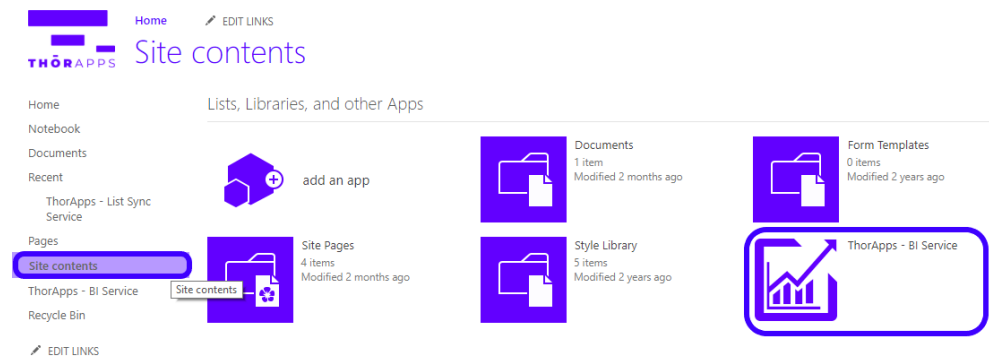
The new Data Source will be displayed in the **Report Library Management** page.

EDIT AN SSRS REPORT TO USE A SHARED DATA SOURCE

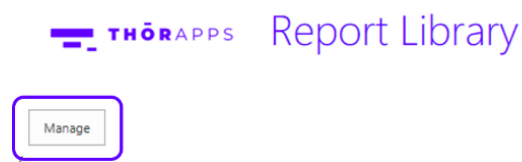
In a browser, navigate to the root of your site collection.

In the Quick Launch menu on the left, click “**Site Contents**”.

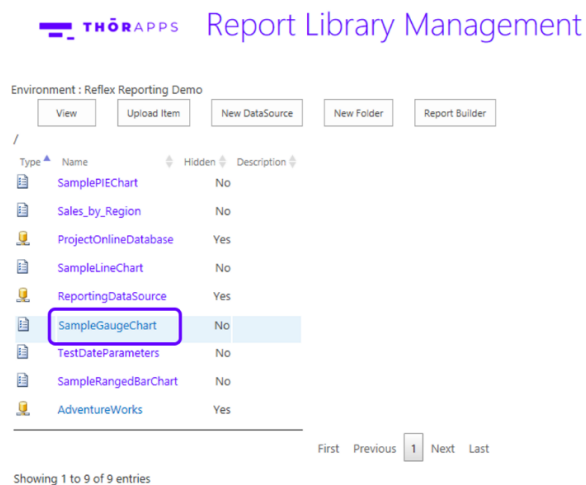
Click on “**ThorApps - BI Service**”.



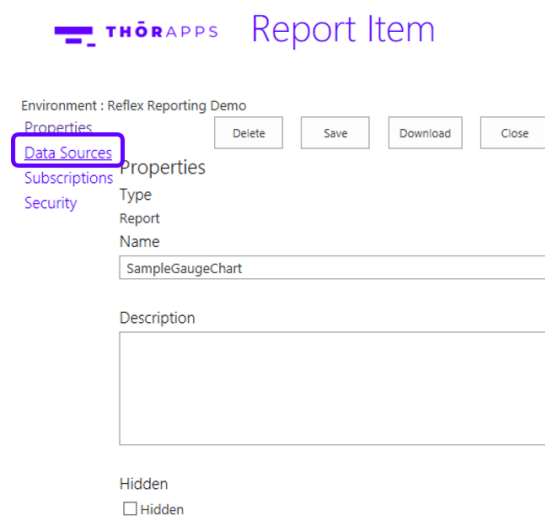
Click “**Manage**”.



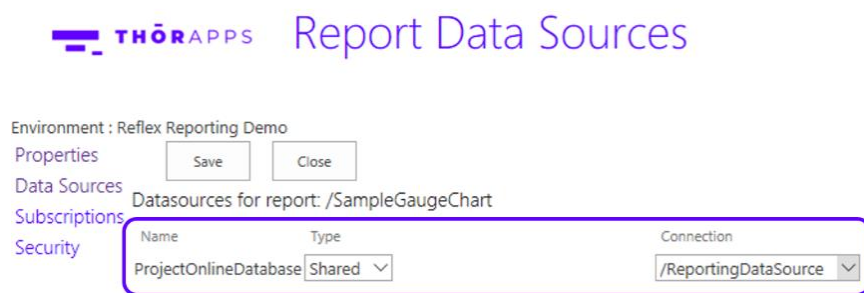
Click on the report name.



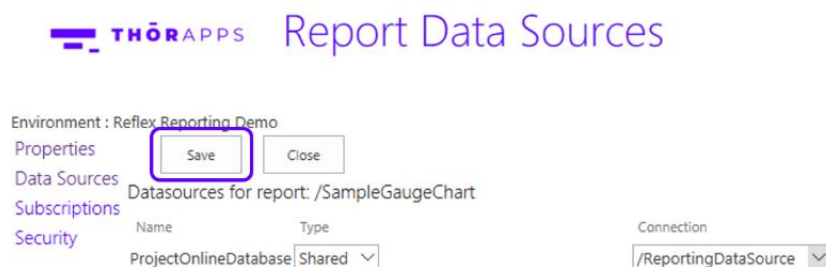
Select “Data Sources” from the left menu.



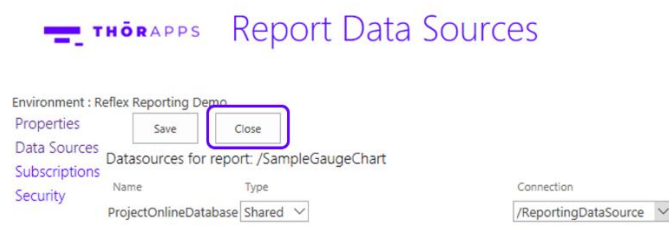
Set the Type and Connection to point to your **Shared Data Source**.



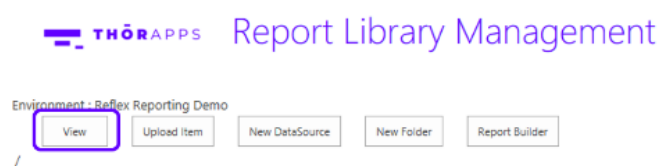
Click “Save”.



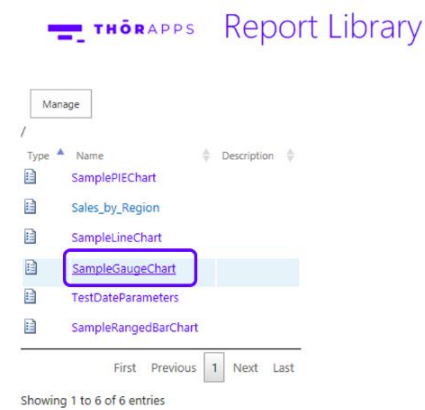
Click **“Close”**.



Click **“View”**.



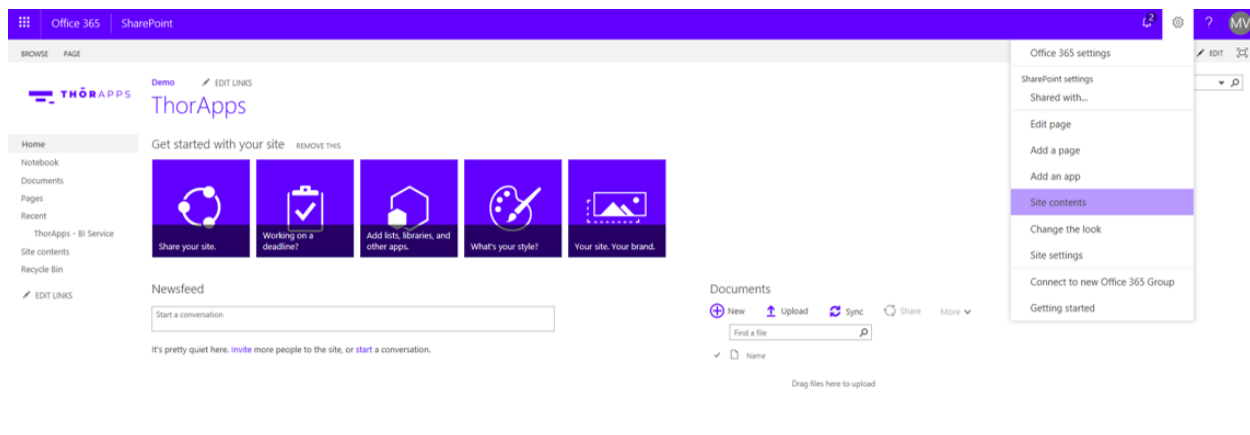
Click the report name to view the report.



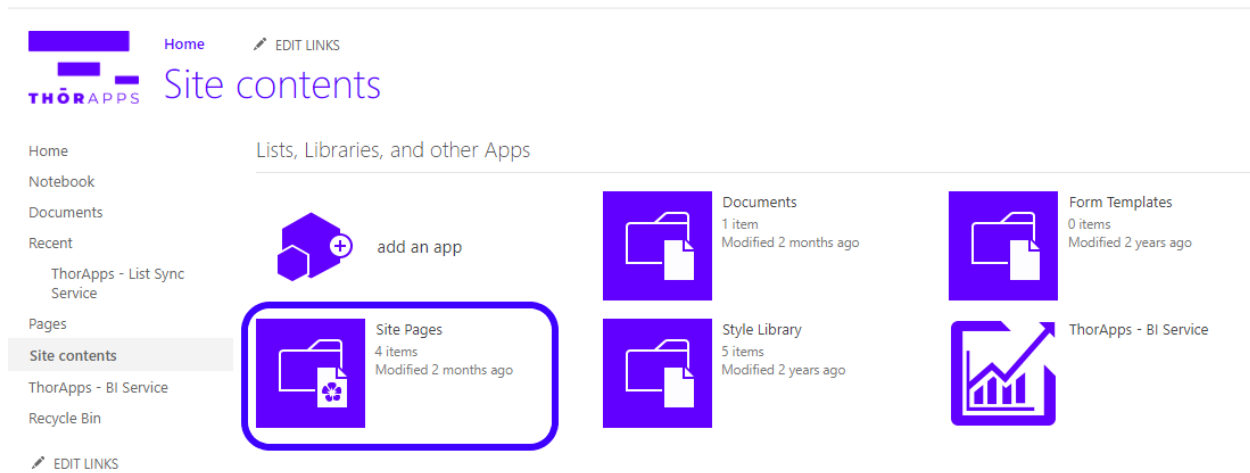
EXPOSE A SSRS REPORT IN A SHAREPOINT ONLINE APP PART

In a browser, navigate to the root of your site collection.

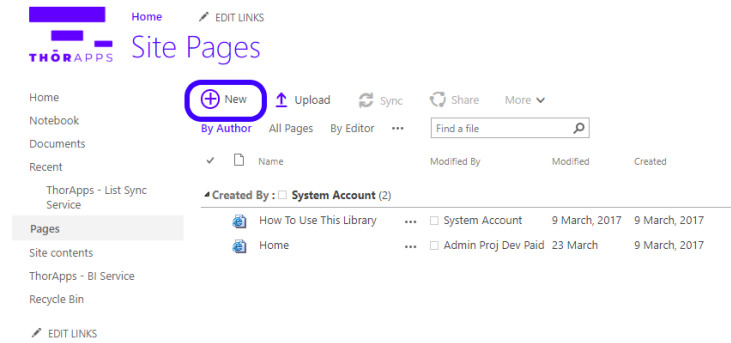
Click on the cog in the upper right and select **“Site Contents”**.



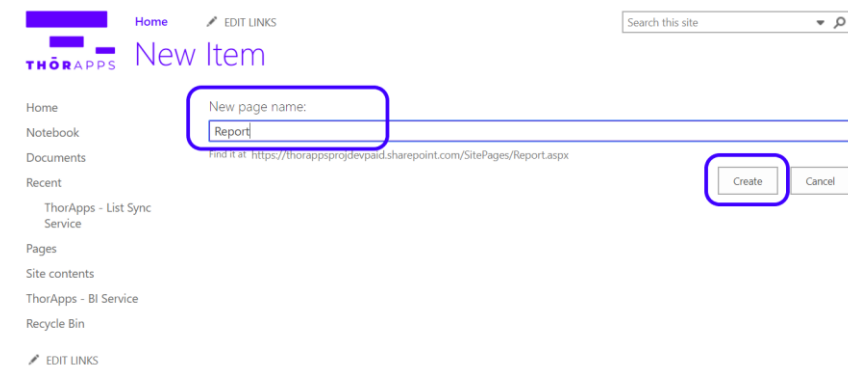
Click **“Site Pages”**.



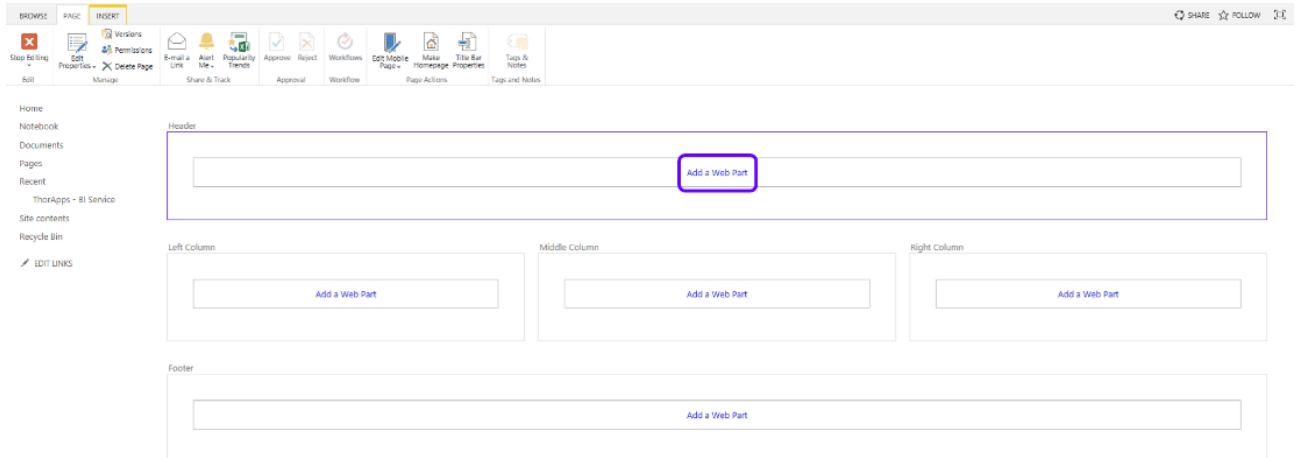
Click "New".



Give the page a name and click "Create".

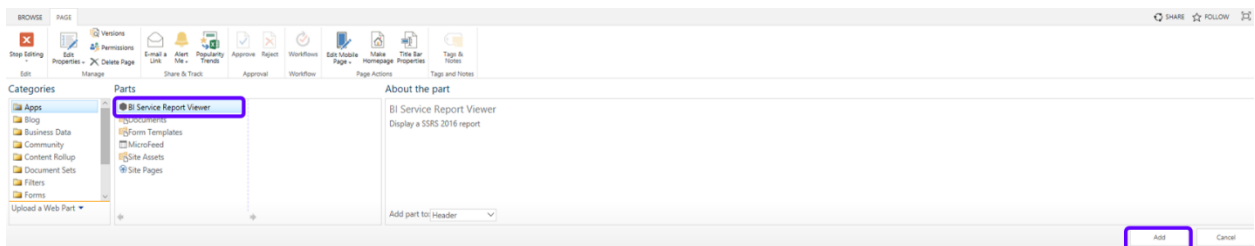


On the new page, click **“Add a Web Part”**.



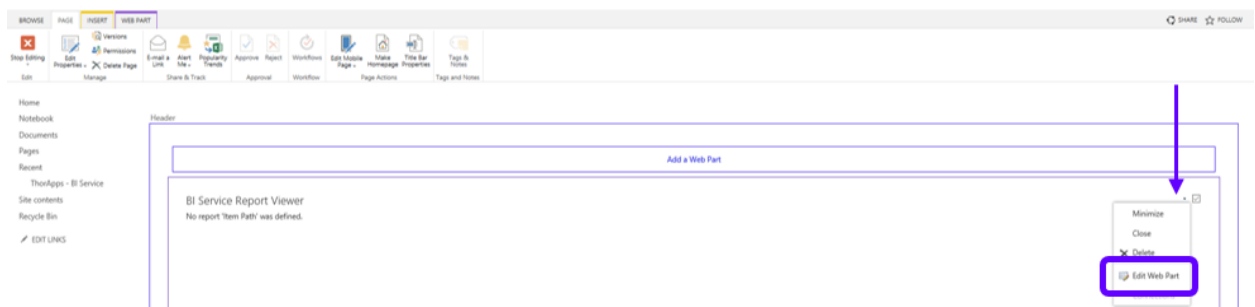
Select the **“BI Service Report Viewer”**.

Click **“Add”**.



Open the web part context menu.

Click **“Edit Web Part”**.



Scroll to the bottom of the web part properties tool part window.

Expand the **“Report Settings”** section.

Enter a report path excluding the report file extension, scroll down and click **“OK”**.

The screenshot shows a web part properties tool part window. The "Report Settings" section is expanded and highlighted with a red box. The "Report Path" field is also highlighted with a red box and contains the text "/Sales_by_Region". The "OK" button at the bottom of the window is also highlighted with a red box. Other sections visible include "Width", "Chrome State", "Chrome Type", "Layout", "Advanced", "Report Parameter - Location", and "Report Parameter - User".

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes Pixels

No. Adjust width to fit zone.

Chrome State

Minimized

Normal

Chrome Type

Default

Layout

Advanced

Report Parameter - Location

Report Settings

Report Path

Show Back Button

Show Document Map Button

Show Export Controls

Show Find Controls

Show Page Navigation Controls

Show Parameter Prompts

Show Print Button

Show Prompt Area Button

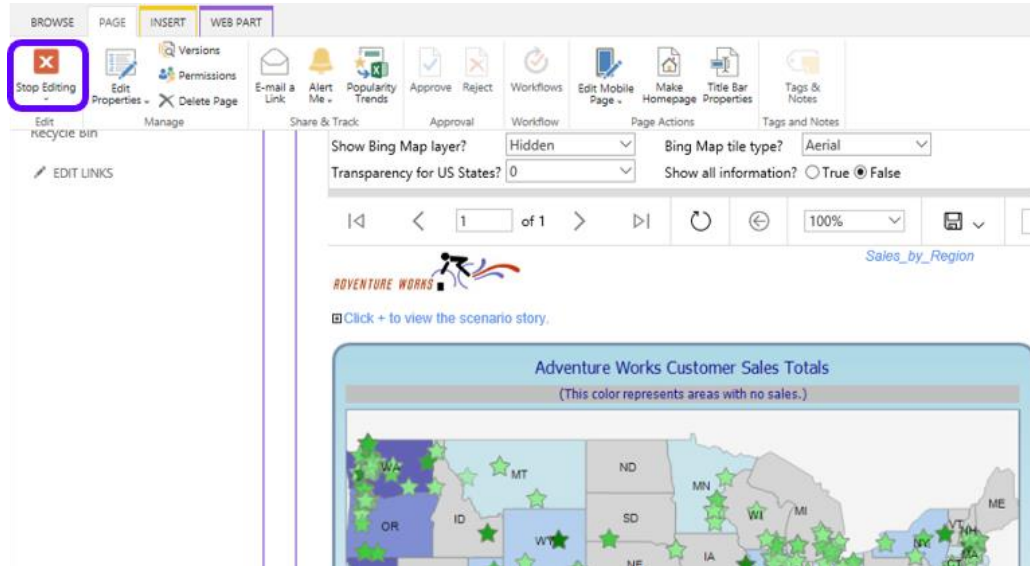
Show Refresh Button

Show ToolBar

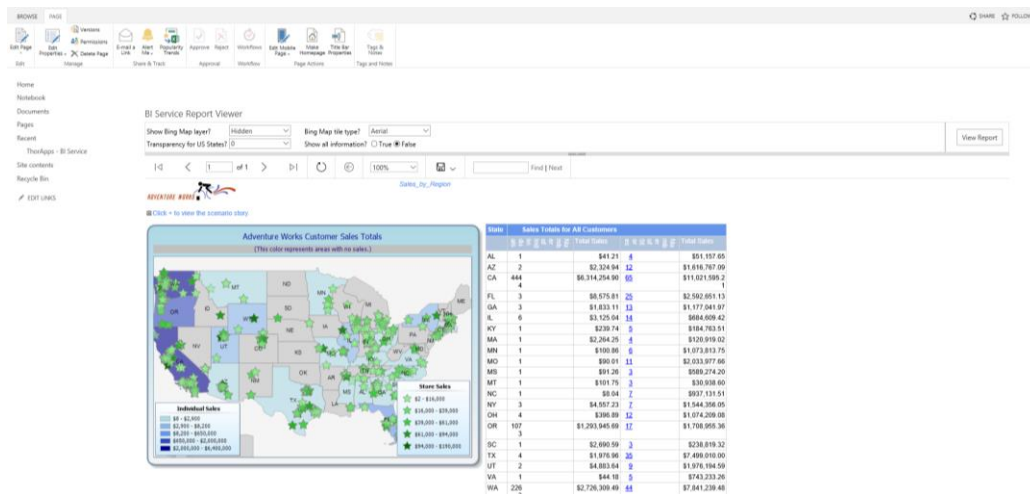
Show Zoom Control

Report Parameter - User

Click "Stop Editing".



And now your report is published.



EXPORTING AND SCHEDULING YOUR REPORTS

How to export your report

IMPORTANT: Reports can be exported both by the user and the admin. Admin can do it from **BI Service** and users can access it from the report published on a **Web Part**.

On your report, click on the **“Save”** item. Choose the format you want to export it: Word, Excel, Power Point, PDF, CSV, etc.

The screenshot displays the THORAPPS 'Sales_by_Region' report. It features a map of the United States with green stars representing sales locations. A dropdown menu is open, showing various export options: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), XML file with report data, and Data Feed. To the right of the map, there is a table titled 'Sales Totals for All Customers' with columns for 'Total Sales' and 'Total Sales' (repeated). The table lists sales data for various states, including NC, NY, OH, OR, SC, and TX, with values ranging from \$8.04 to \$1,706,955.36.

This will trigger an automatic download to your computer.

How to schedule your report

IMPORTANT: Scheduling reports are only available under admin level.

To schedule your reports via email, open your **Settings**.

The screenshot shows the THORAPPS 'Report Library' interface. It includes a navigation bar with 'Back to Site' and 'Report Library'. Below the navigation bar, there are buttons for 'Manage' and 'Quick Start Guide'. A table lists reports, with 'DemoTeamTasks' visible. On the right side, a settings menu is open, showing options: 'Account Settings', 'Environment Settings' (highlighted with a red box), and 'Subscription Schedules'.

Select the **SMTP** option, fill the required information and click **“Save”**.

THORAPPS Environment Settings - SMTP

Overview **Save** Cancel

Environment

SMTP

Report Server

Sites

Back To App

Enabled SMTP Check to enable these SMTP settings

Outbound SMTP Server

SMTP Port

SMTP SSL Enable

SMTP Username

SMTP Password

From Address

Reply-to Address

Click **“Back To App”** on the left side.

Go to **Settings** again and select **“Subscription Schedules”**.

Back to Site Report Library

THORAPPS Report Library

Account Settings
Environment Settings
Subscription Schedules

Manage Quick Start Guide

Type	Name	Description
Folder	New folder	
Task	DemoTeamTasks	

First Previous 1 Next Last

Showing 1 to 2 of 2 entries

Click **“New”**.

THORAPPS Subscription Schedules

Environment : Demonstration

Close **New**

Name	Enabled	Next Run	Description
No data available in table			

First Previous Next Last

Showing 0 to 0 of 0 entries

Fill the information and choose the desired frequency and time.

THORAPPS Schedule

Environment : Demonstration

Properties

Name

Daily 8am

Description

Sales report

Enabled

Enabled

Schedule

Frequency Unit

Frequency Value

Next Start time

Back to the **Subscription Schedules**, click on the report you have created.

THORAPPS Subscription Schedules

Environment : Demonstration

Name	Enabled	Next Run	Description
Daily 8am	Yes	2019-09-04 08:00:00	Sales report
Weekly Monday 2pm	Yes	2019-09-04 16:59:00	

First Previous Next Last

Showing 1 to 2 of 2 entries

Click **"Subscriptions"**.

THORAPPS Schedule

Environment : Demonstration

Properties

Name

Daily 8am

Click **"New"** to create a schedule subscription.

THORAPPS Schedule Subscriptions

Environment : Demonstration

Close New

Subscriptions for schedule: Daily 8am

Name Enabled Last Run Last Results

No data available in table

First Previous Next Last

Showing 0 to 0 of 0 entries

Fill the name and description.

Select your report.

Select the **Data Driven Subscription** in case you want to create one.

THORAPPS Report Subscription

Environment : Demonstration

Delete Next Cancel

Properties

Name

Sales Report Daily 8am

Description

To be delivered to sales team

Report

/Sales_by_Region

SCHEDULE

Daily 8am

Delivery Type

Document Library

Enabled

Enabled

Data Driven Subscription

This is a Data Driven Subscription

Click **“Next”**.

THORAPPS Report Subscription

Environment : Demonstration

Delete Next Cancel

Check the information and click **“Next”**.

Fill the **Delivery Parameters**.

IMPORTANT: For email subscriptions, we recommend using HTML formats.

Click “**Save & Run Now**” and check if you receive the test email.

Environment : Demonstration

Previous Save **Save & Run Now**

Properties

Name
Sales Report Daily 8am

Report

/Sales_by_Region
Schedule
Daily 8am

Delivery Parameters

To Use a defined value ▼ maria.vieira@thorapps.com

CC Use a defined value ▼

BCC Use a defined value ▼

Reply-to Use a defined value ▼

Subject Use a defined value ▼ Daily Report

Body Use a defined value ▼

Body Is Html Use a defined value ▼ Yes ▼

Report Format Use a defined value ▼ HTML5 ▼

Attach Report Use a defined value ▼ As Email Body ▼

File Name Use a defined value ▼

SO, WHAT’S NEXT?

Purchasing

Like what you’ve seen? If you’d like to keep using **ThorApps – BI Service**, you’ll need to setup your subscription and payment.

You can configure these through the account settings page, which is accessed from the cog icon in the upper right.

Click [here](#) to download the **Purchasing Guide**.

ANY QUESTIONS?

Contact our team of specialists at info@thorapps.com.