USER GUIDE

BI SERVICE

www.thorapps.com

THŌRAPPS

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

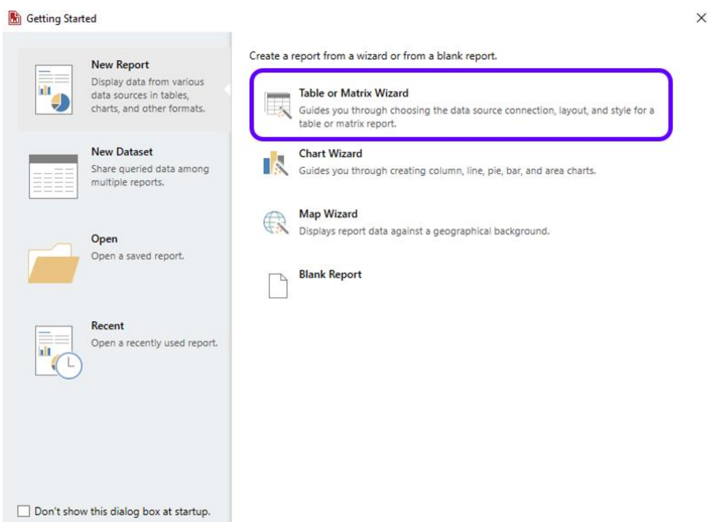
To begin we will demonstrate how to create an SSRS report using **Microsoft Report Builder** that can later be published to **ThorApps - BI Service** and accessible via SharePoint Online.

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**".

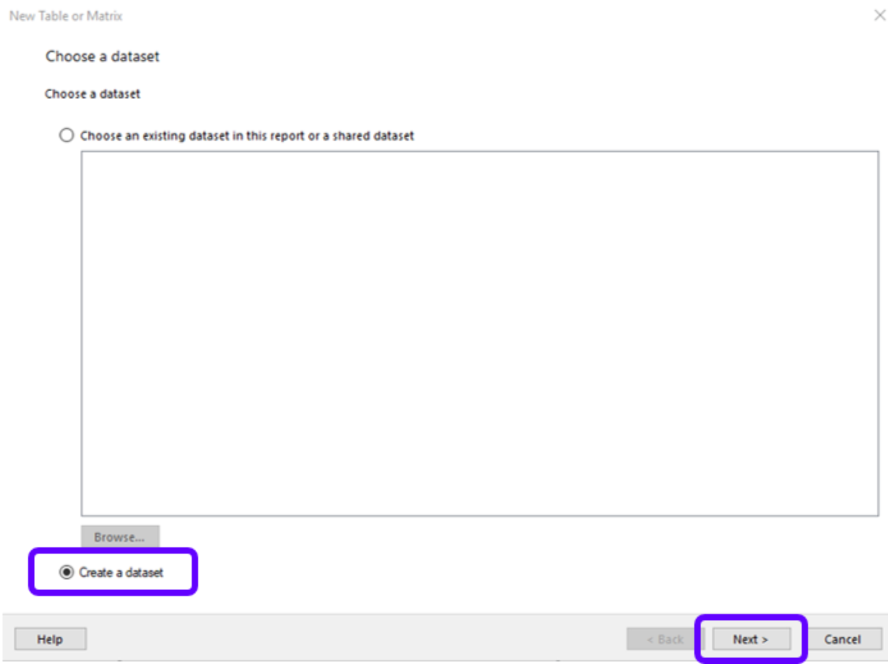
Click "**New**".

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

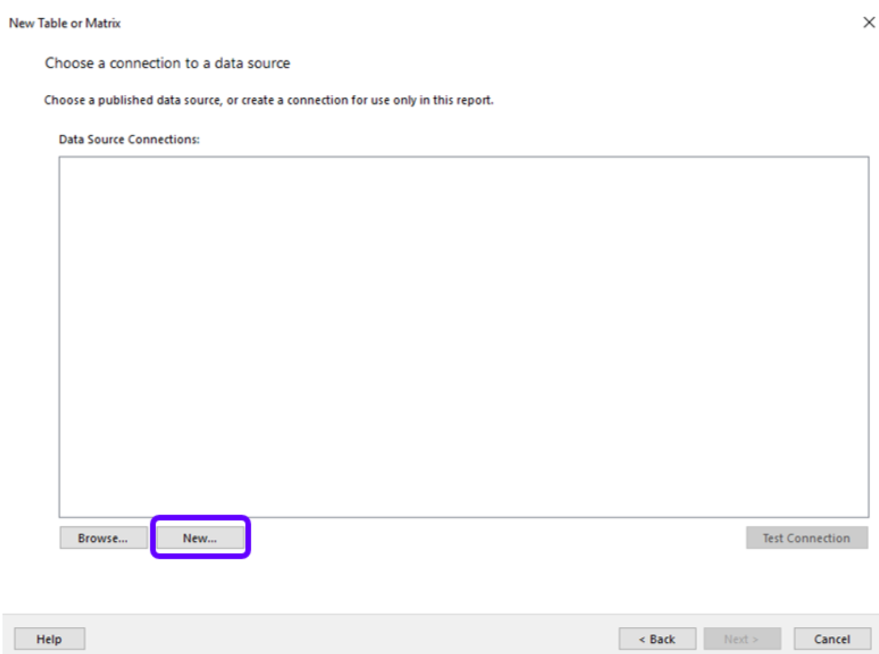


Check “**Create a dataset**”.

Click “**Next**”.



Click “**New**”.

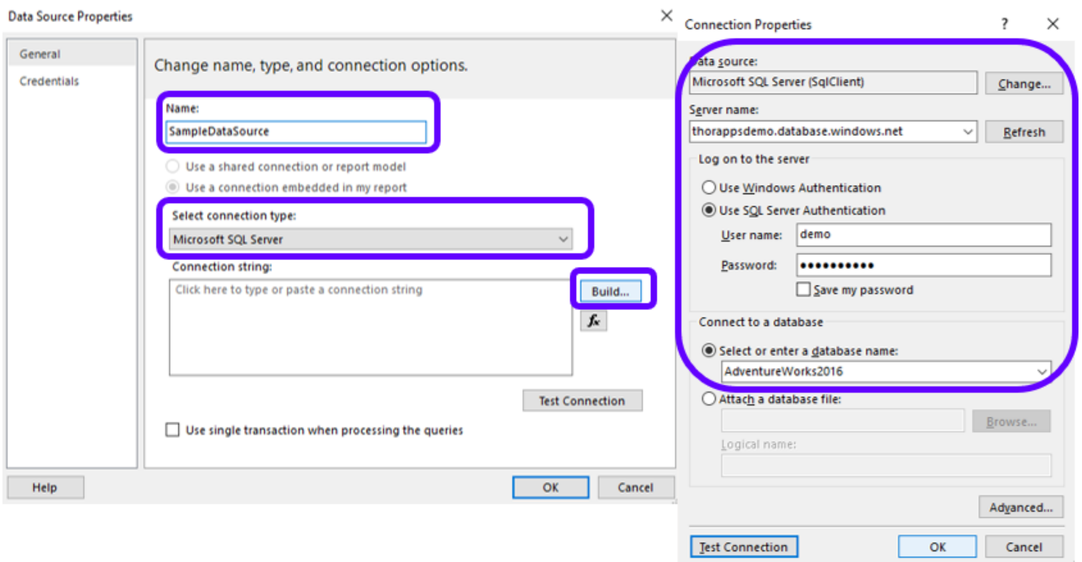


Give the new data source a Name.

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.

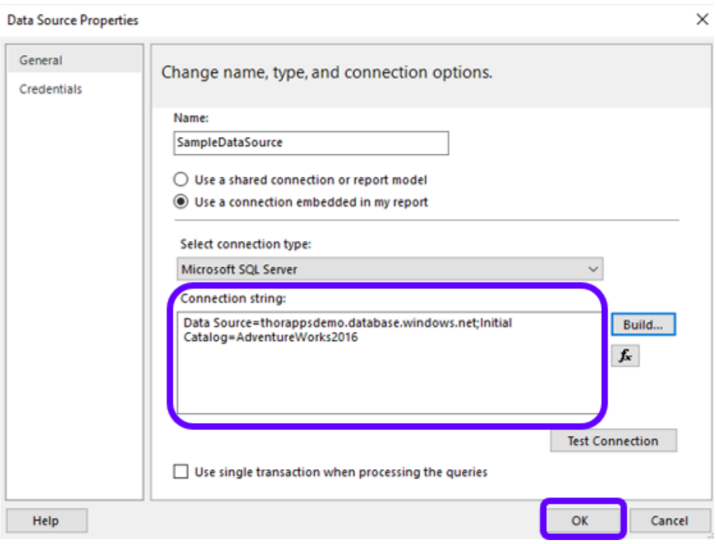
Click “**Test Connection**” to check connectivity.

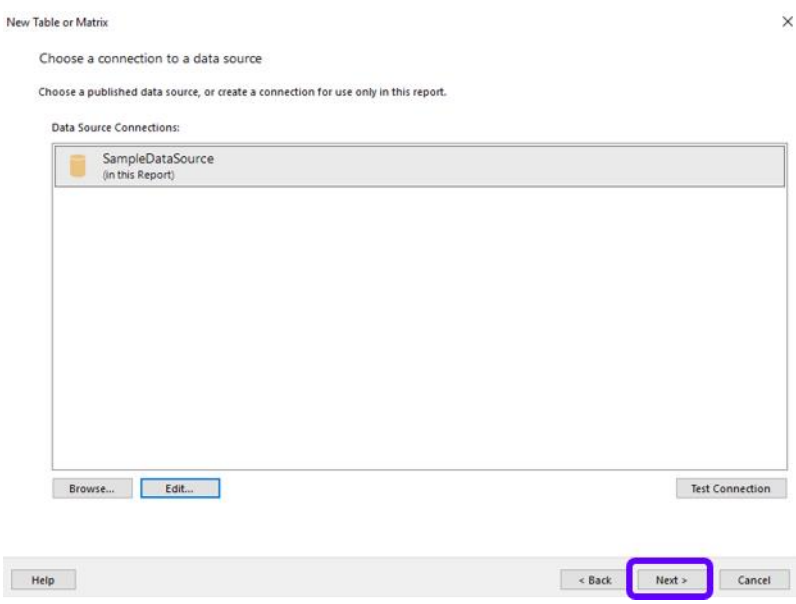
Click “**OK**”.

This will have generated the connection string.

Click “**OK**”.

Click “**Next**”.

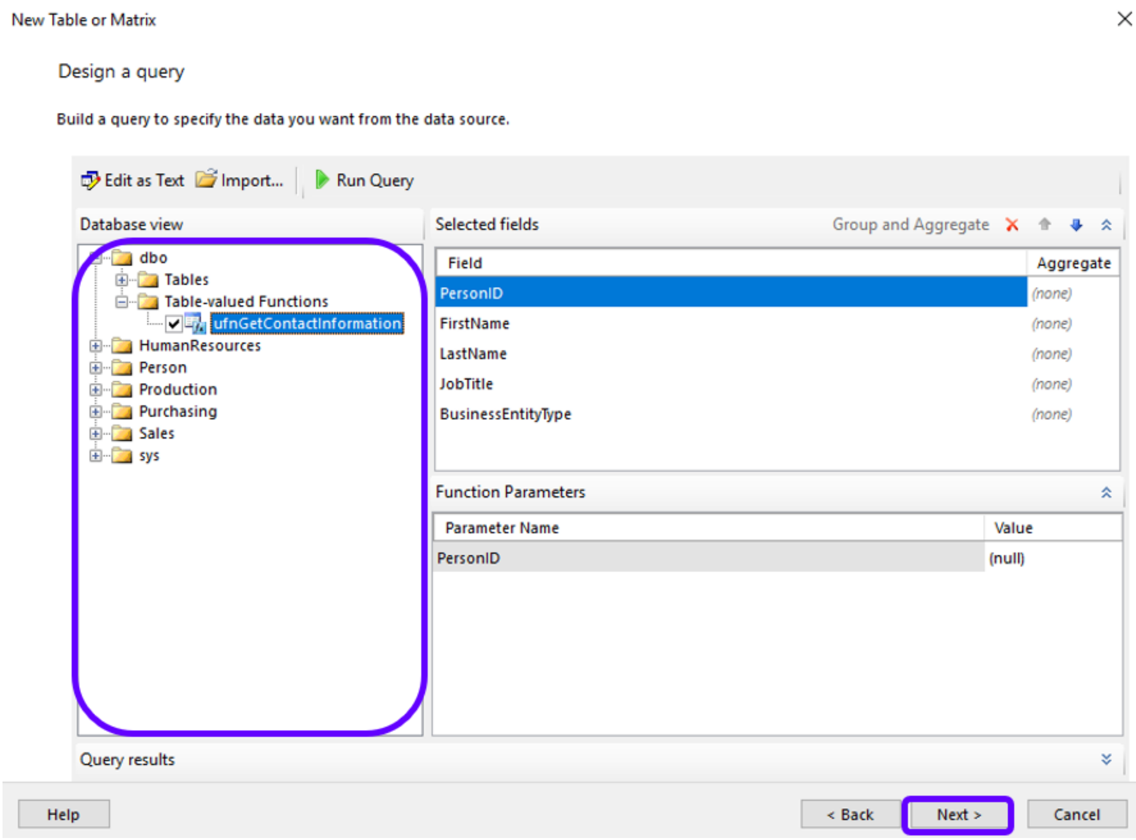




In the “**Database view**” pane on the left, navigate to the table containing the desired data.

Expand the table node and select the columns you want.

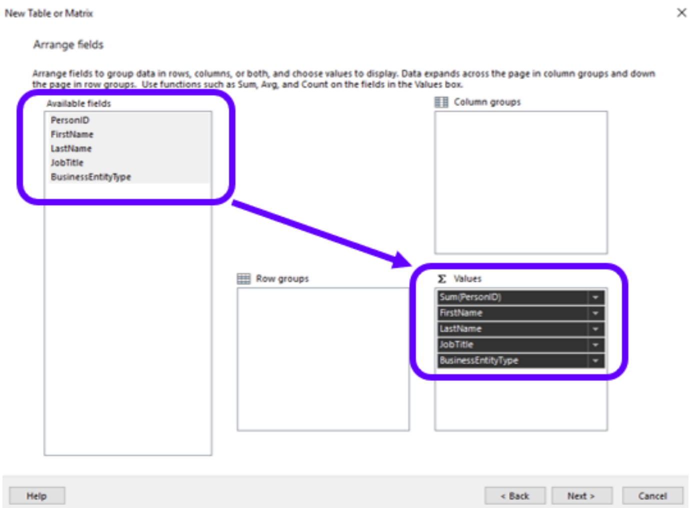
Click “**Next**”.



Select all the desired fields.

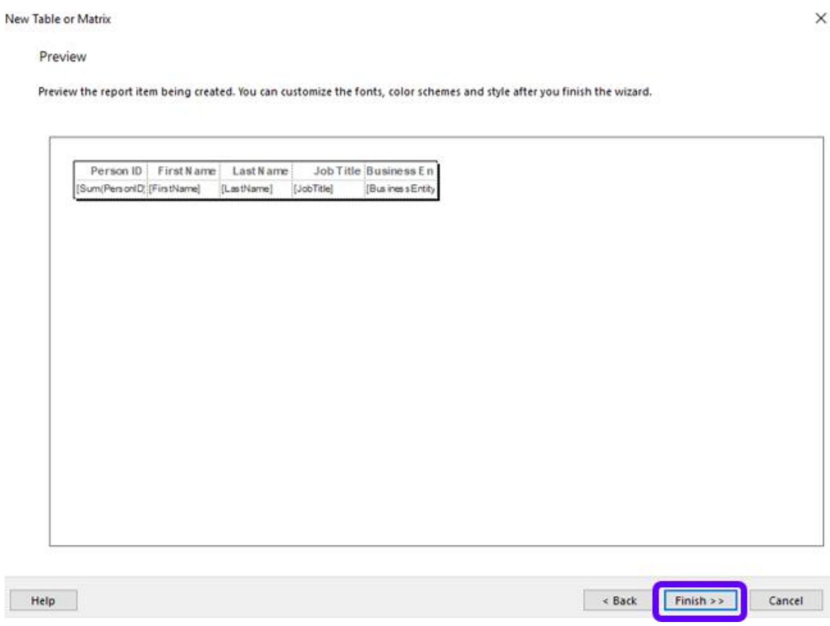
Drag and Drop them into the **Values** box.

Click “**Next**”.

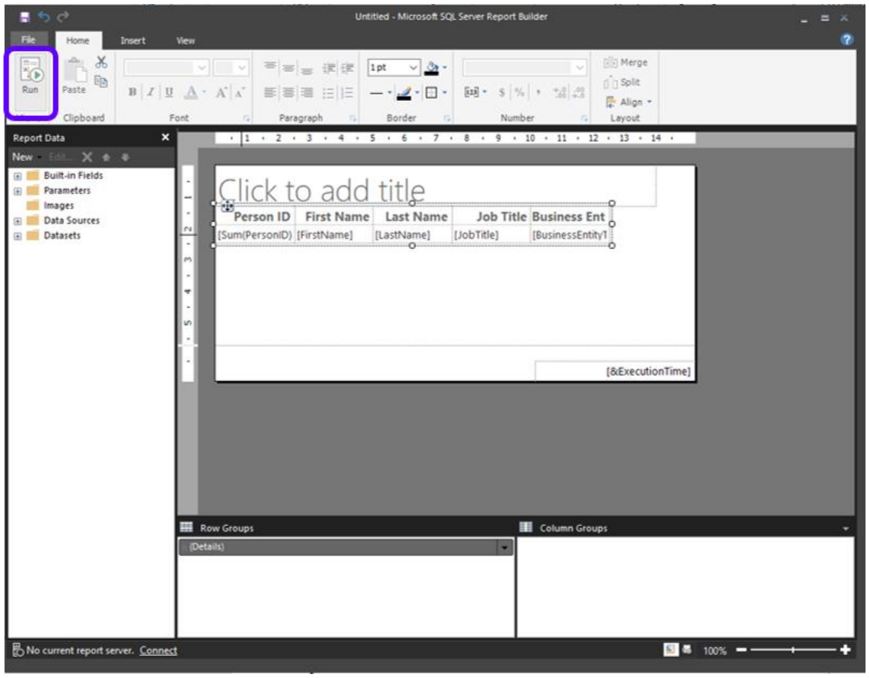


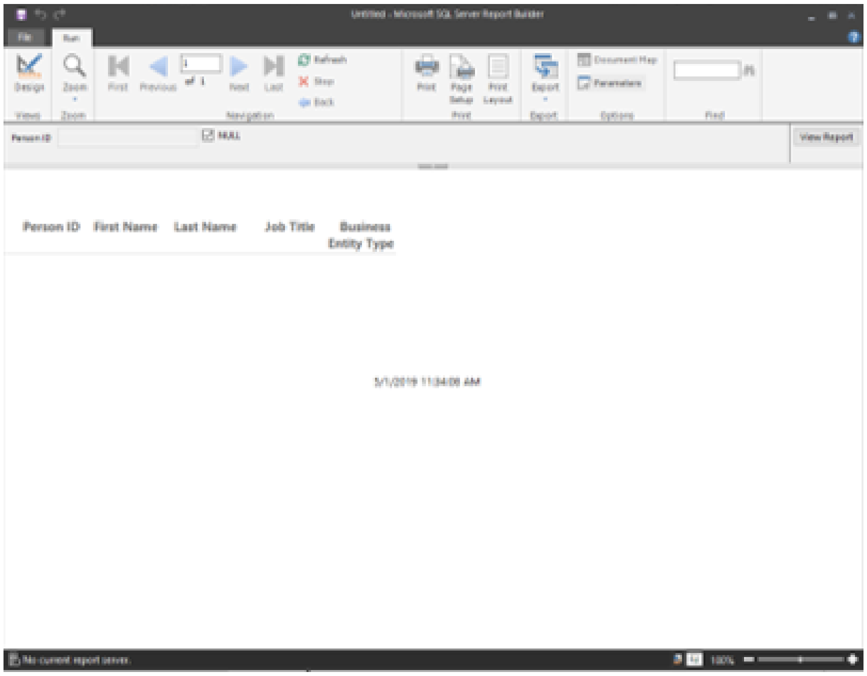
Click “**Next**”.

Click “**Finish**”.



Click “**Run**” to test the report.

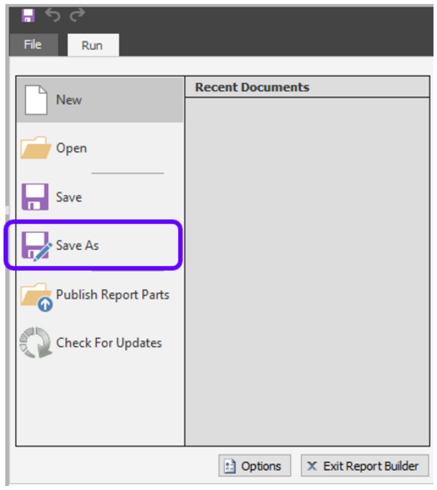




Click “**Design**” to return to the design page.

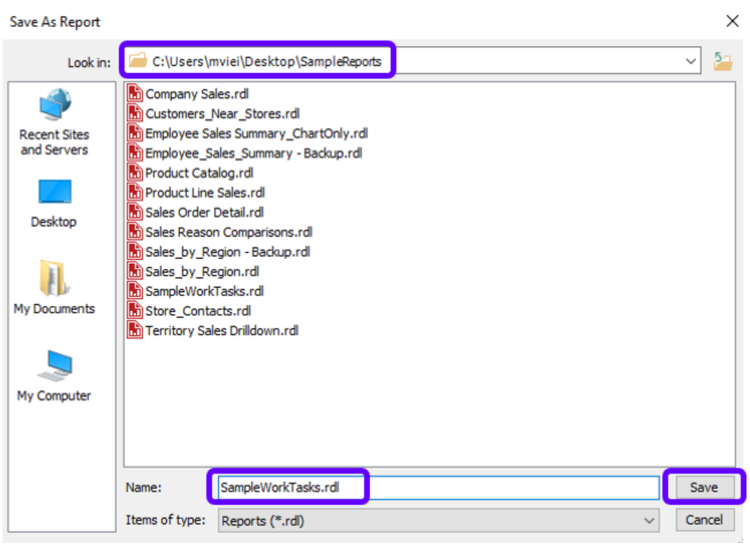
Click “**File**”.

Click “**Save As**”.



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

Click “Save”.



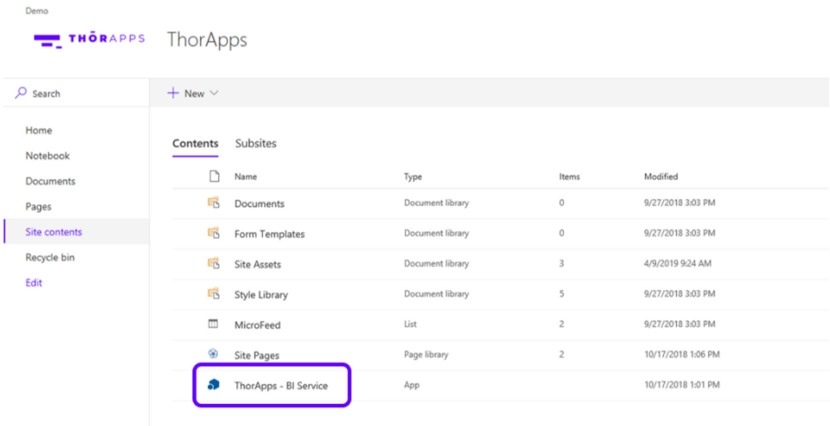
This has created a report with an embedded data source. However, embedded data sources create maintenance issues, especially when you need to update dozens or even hundreds of reports. We will edit the report to use a shared data Source instead once it is published to the **ThorApps – BI Service** Report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

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

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

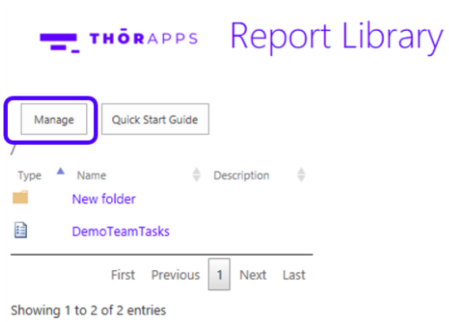
Click on the cog in the upper right and select “**Site Contents**”.

Click on “**ThorApps - BI Service**”.



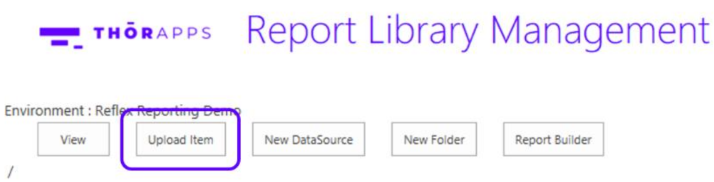
Click “**Manage**”.

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.

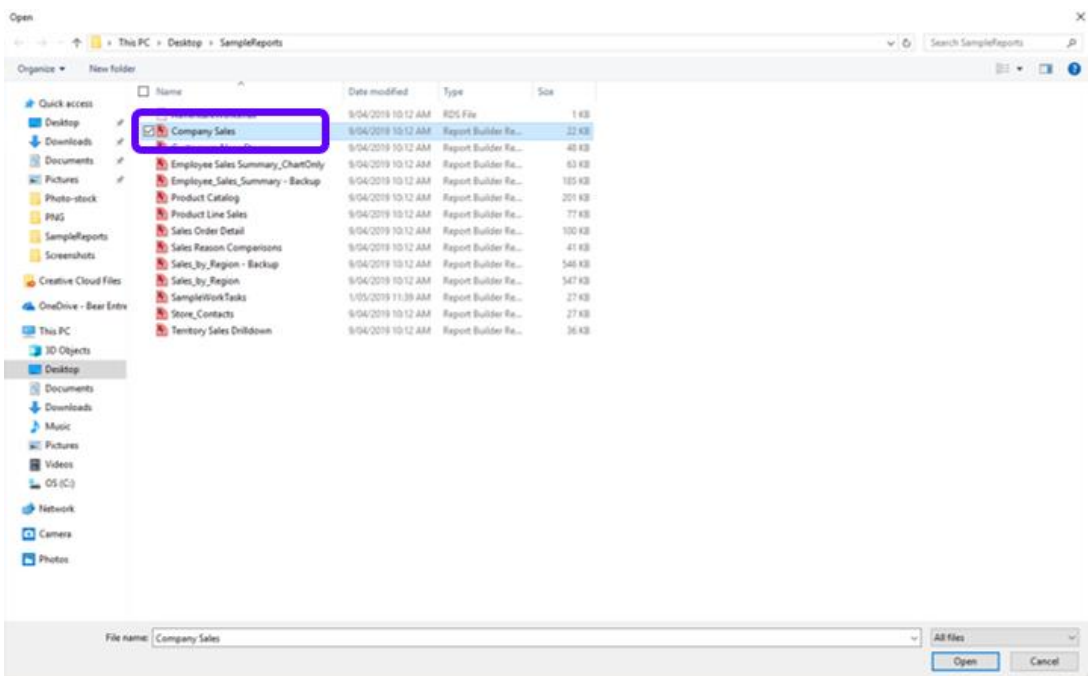
Click “**Upload Item**”.



Click “**Choose Files**”.

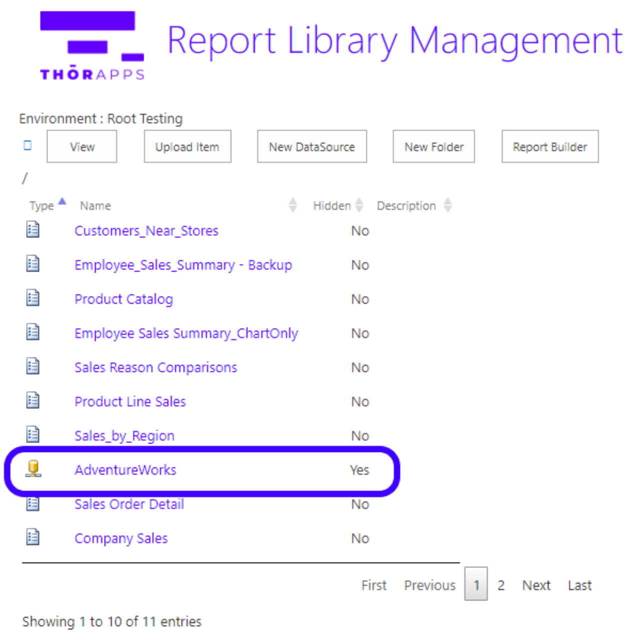
Locate the report files (.rdl) for the report you wish to publish.

Select it and click “**Open**”.

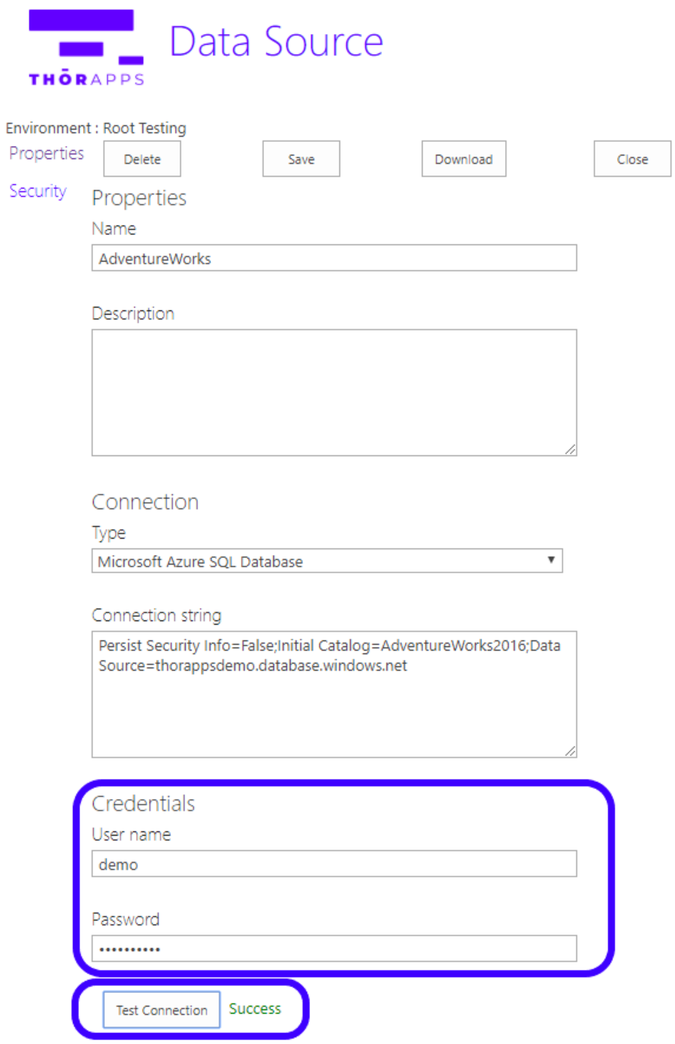


IMPORTANT: The report Data Source is NOT uploaded with Credentials, so you will need to re-enter them.

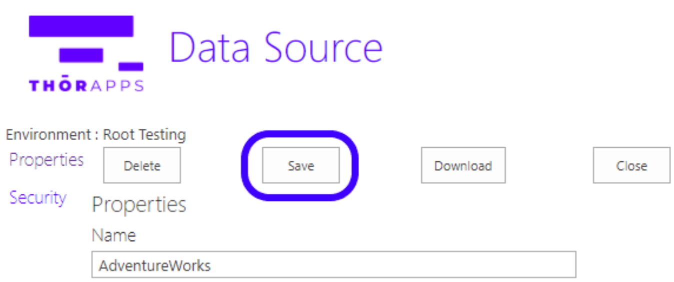
Click your **Data Source**.


THORAPPS
Report Library Management
Environment : Root Testing
View
Upload Item
New DataSource
New Folder
Report Builder
/
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.

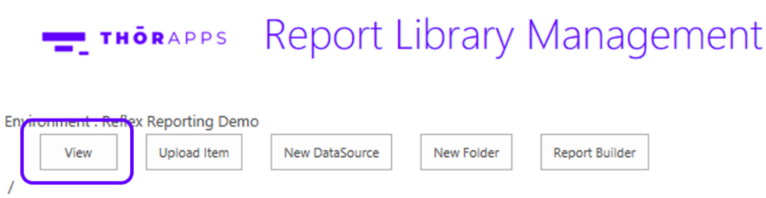


Click “**Save**”.

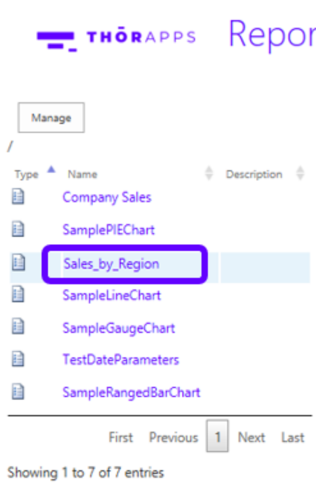


Click "**View**" to return to the standard report library view.

Note the Data Sources are not visible in this view.



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



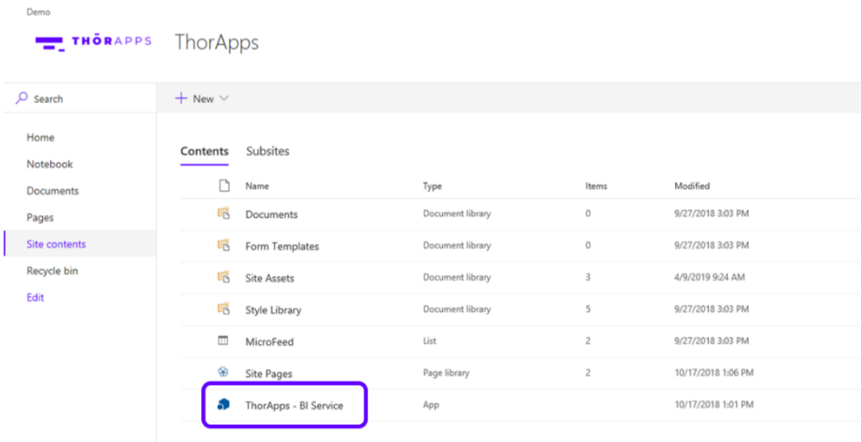
IMPORTANT: Reports created in Report Builder will have an embedded Data Source, rather than using a shared Data Source. This creates maintenance difficulties, and so should be edited to use shared Data Sources as described in the following sections.

CREATE A SHARED DATA SOURCE

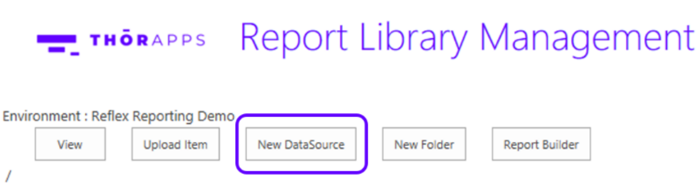
In a browser, navigate to the root of your site collection.

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

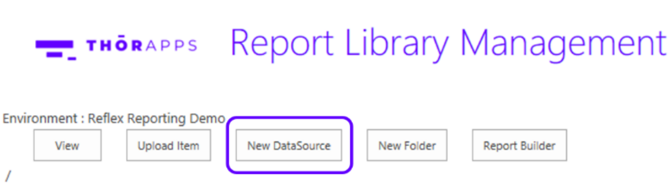
Click on “**ThorApps - BI Service**”.



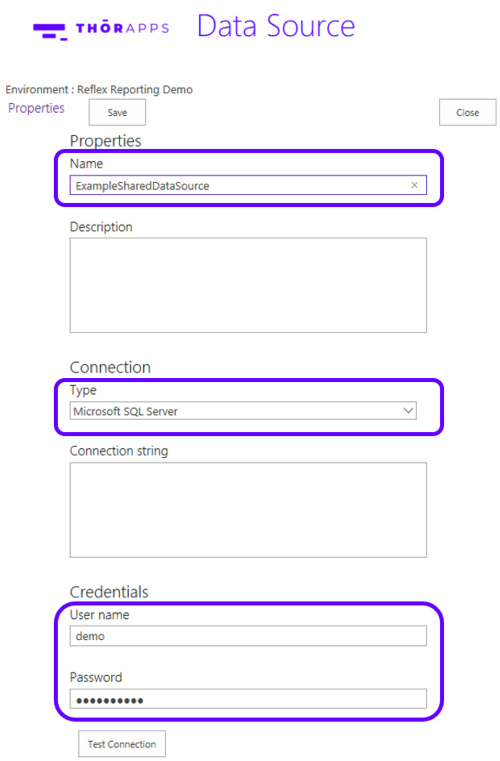
Click “**Manage**”.



Click “**New DataSource**”.

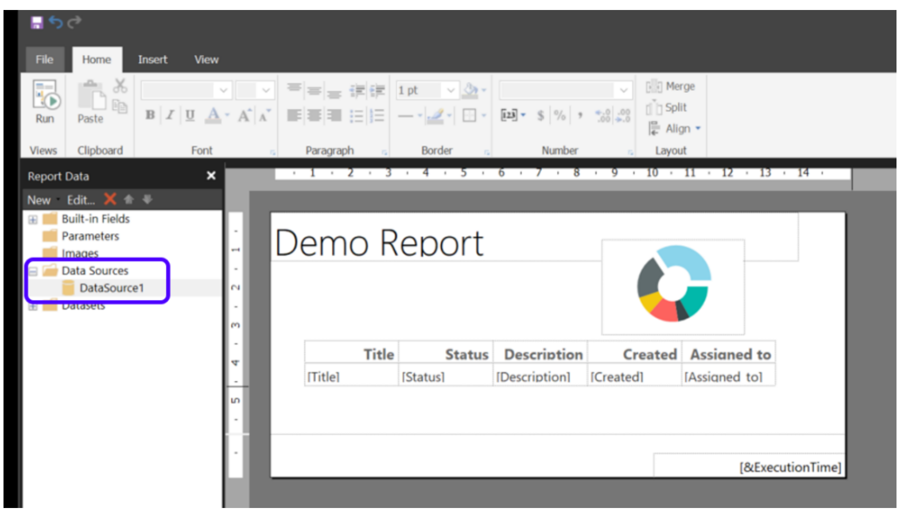


Give it a name, connection type and credentials.

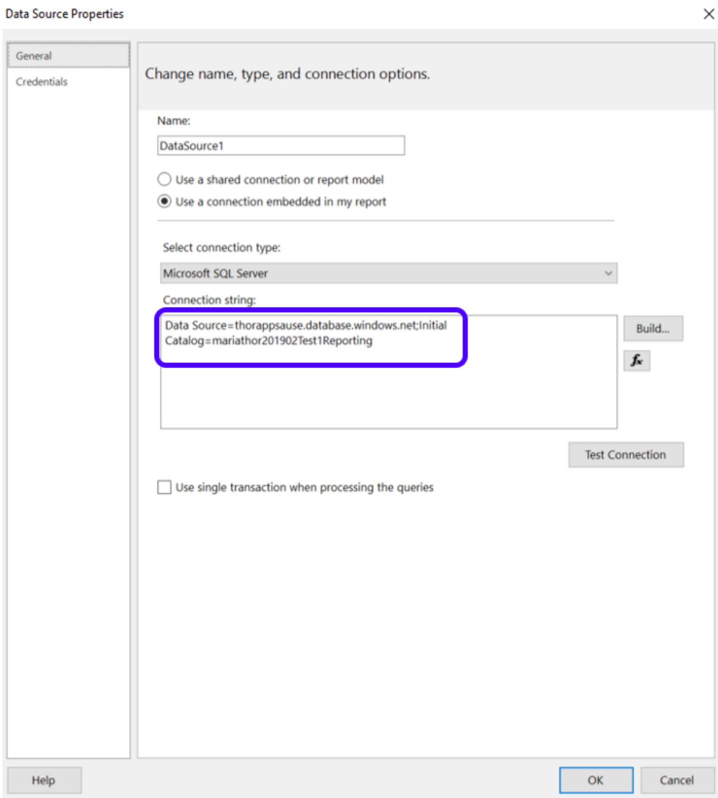


It will also need a connection string of course, so we need to generate one.

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

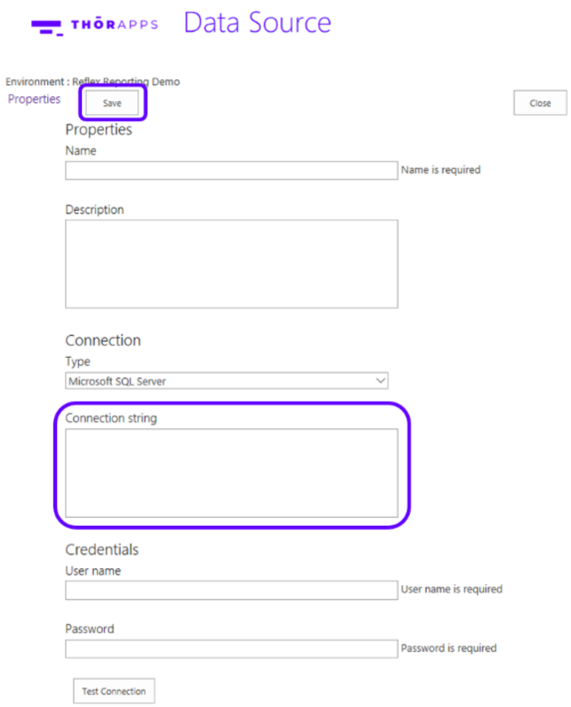


Copy the information from the **Connection string** box.



Return to your browser.

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



Click “**Save**”.

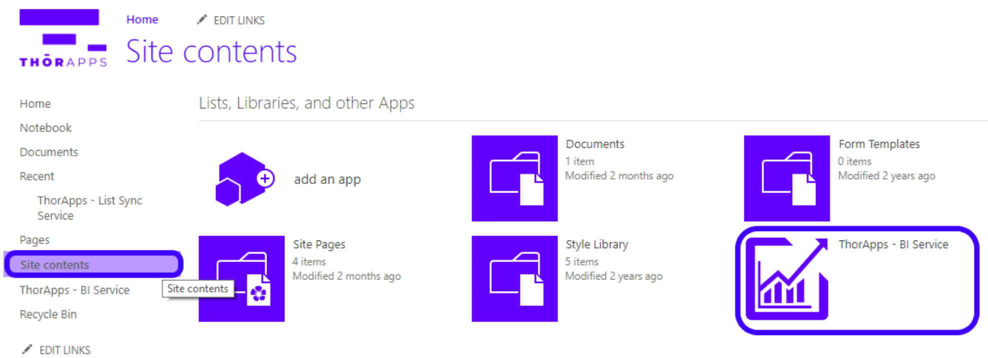
The new Data Source will be displayed in the **Report Library Management** page.

EDIT AN SSRS REPORT TO USE A SHARED DATA SOURCE

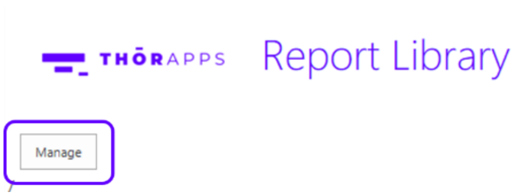
In a browser, navigate to the root of your site collection.

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

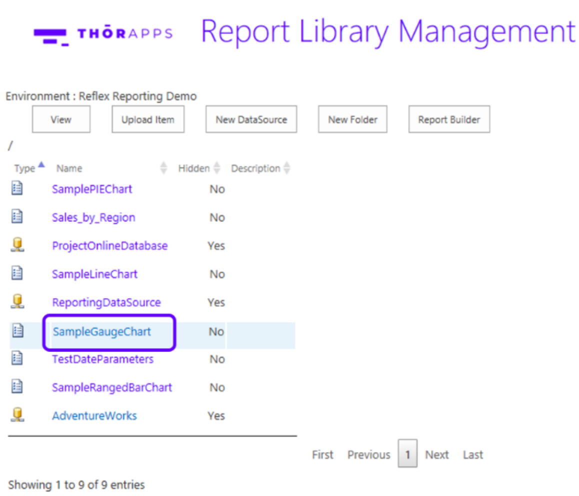
Click on “**ThorApps - BI Service**”.



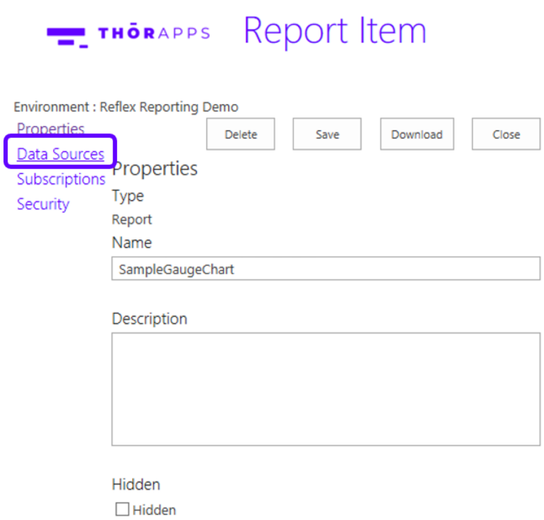
Click “**Manage**”.



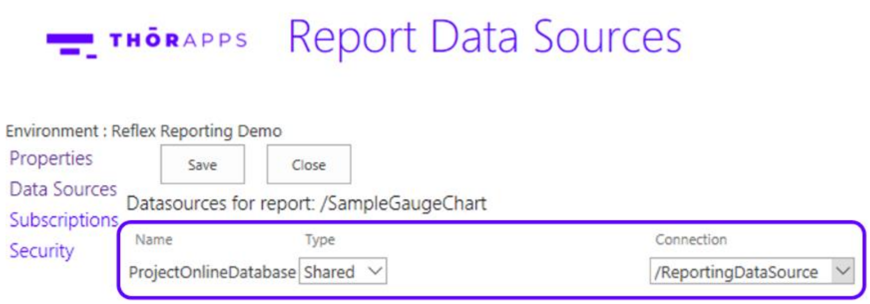
Click on the report name.



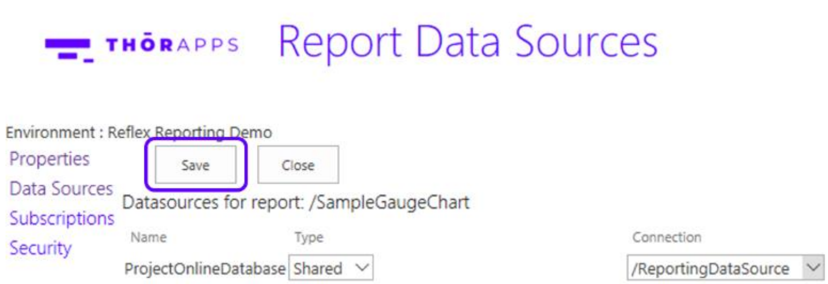
Select “**Data Sources**” from the left menu.



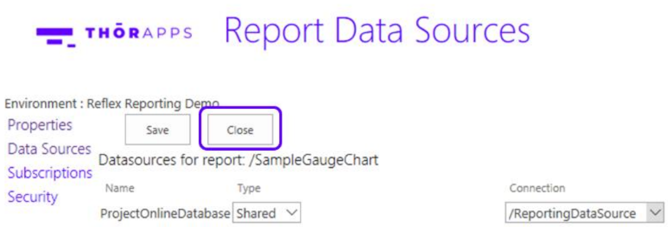
Set the Type and Connection to point to your **Shared Data Source**.



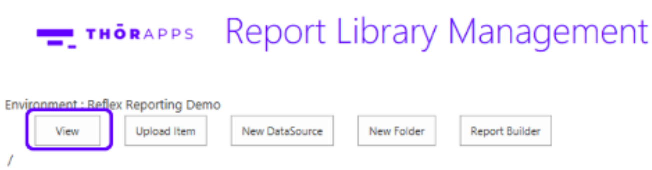
Click “**Save**”.



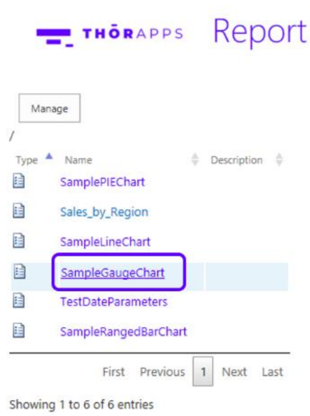
Click “**Close**”.



Click “**View**”.



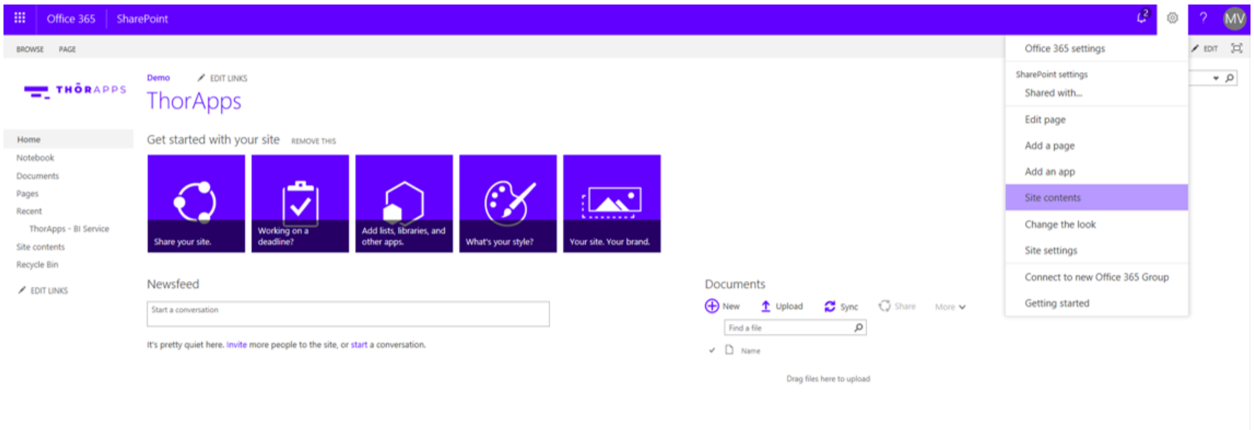
Click the report name to view the report.



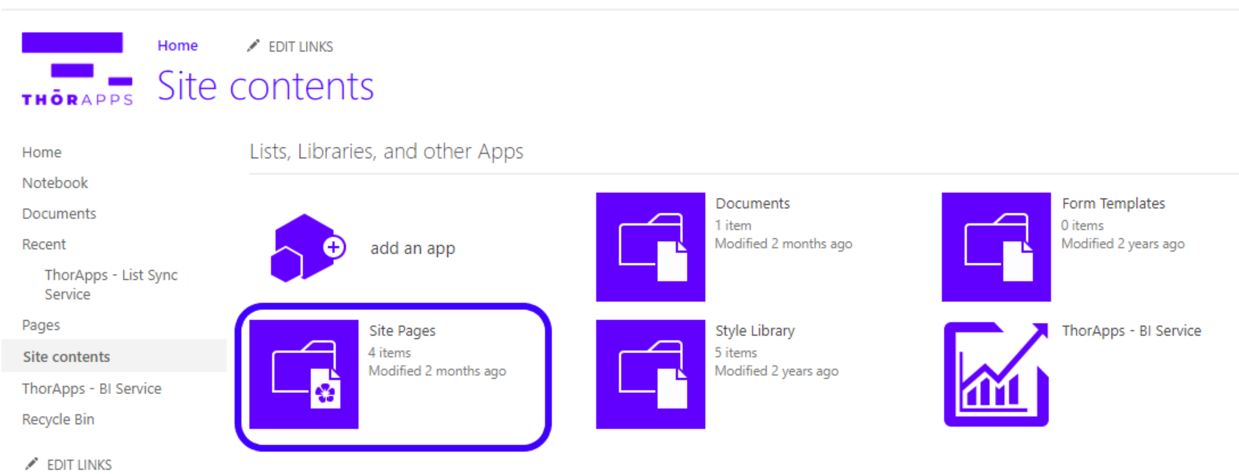
EXPOSE A SSRS REPORT IN A SHAREPOINT ONLINE APP PART

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

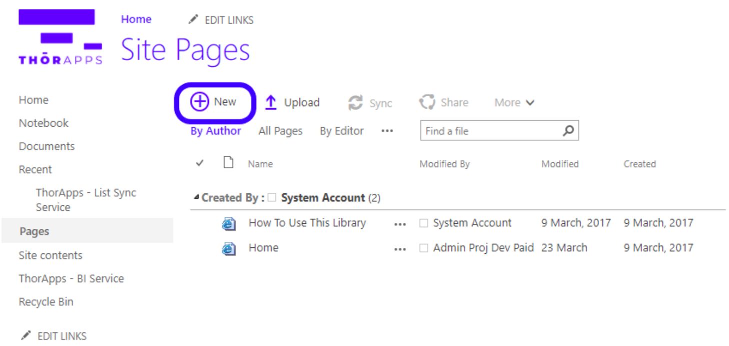
Click on the cog in the upper right and select “**Site Contents**”.



Click “**Site Pages**”.

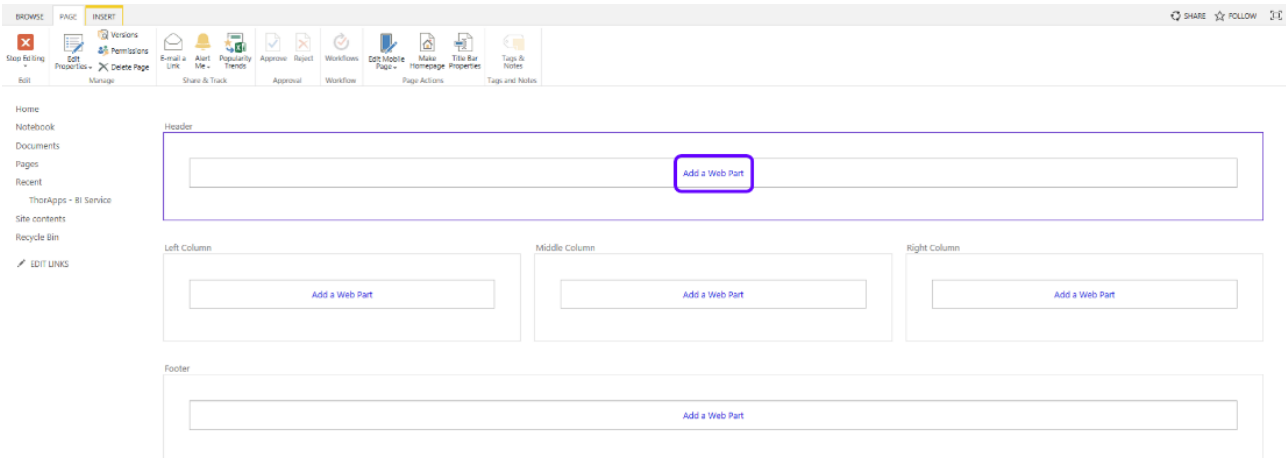


Click “**New**”.



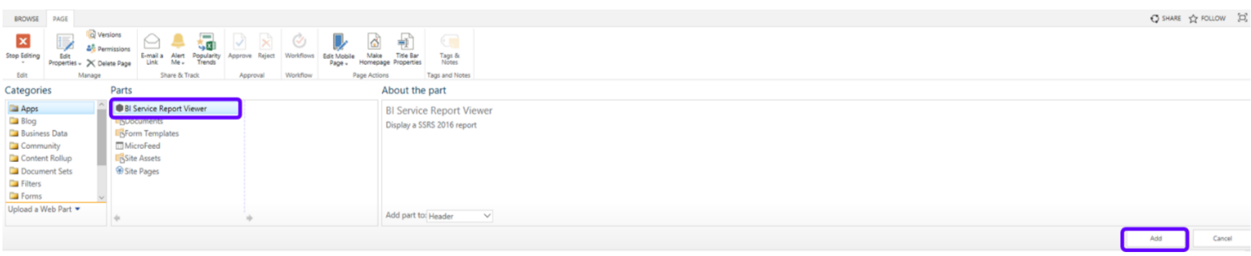
Give the page a name and click “**Create**”.

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



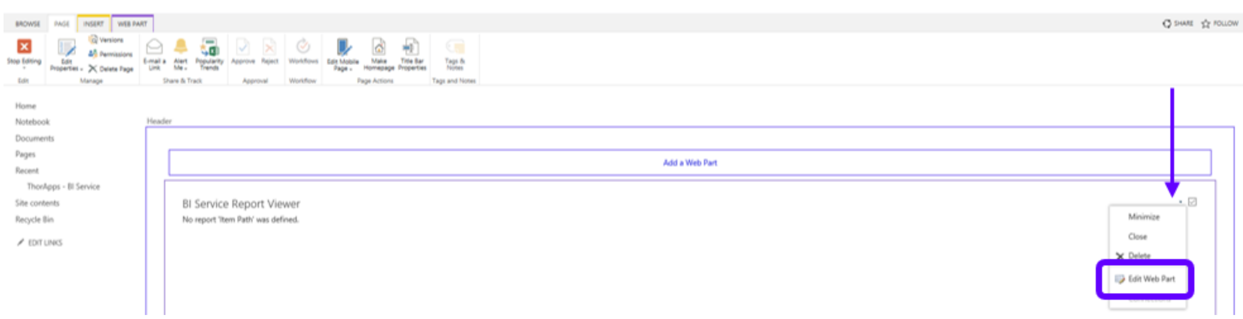
Select the “**BI Service Report Viewer**”.

Click “**Add**”.



Open the web part context menu.

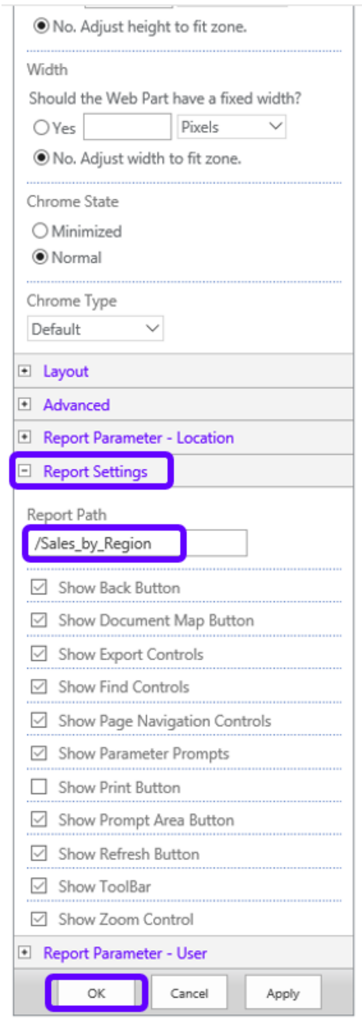
Click “**Edit Web Part**”.



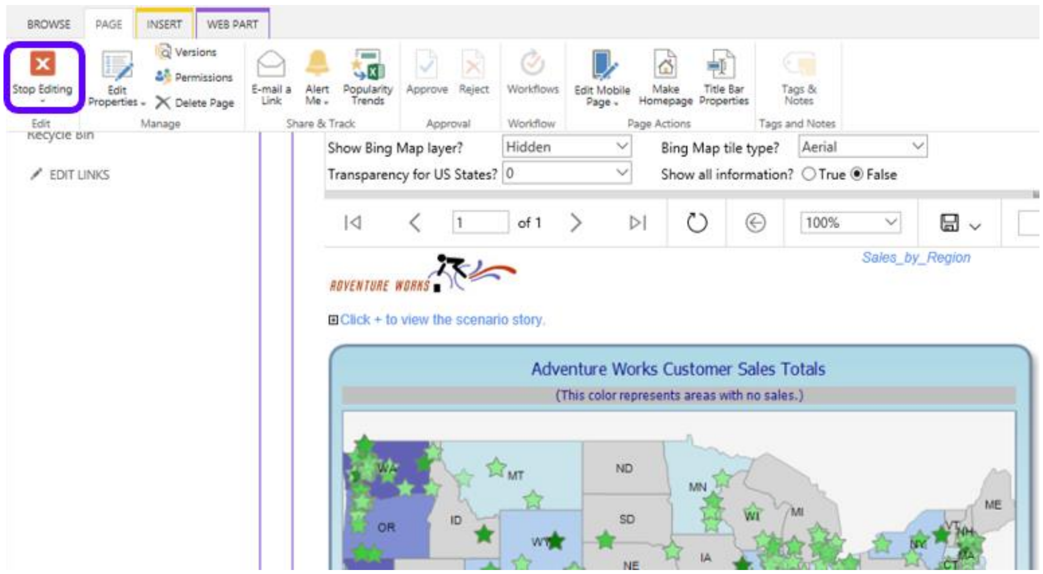
Scroll to the bottom of the web part properties tool part window.

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

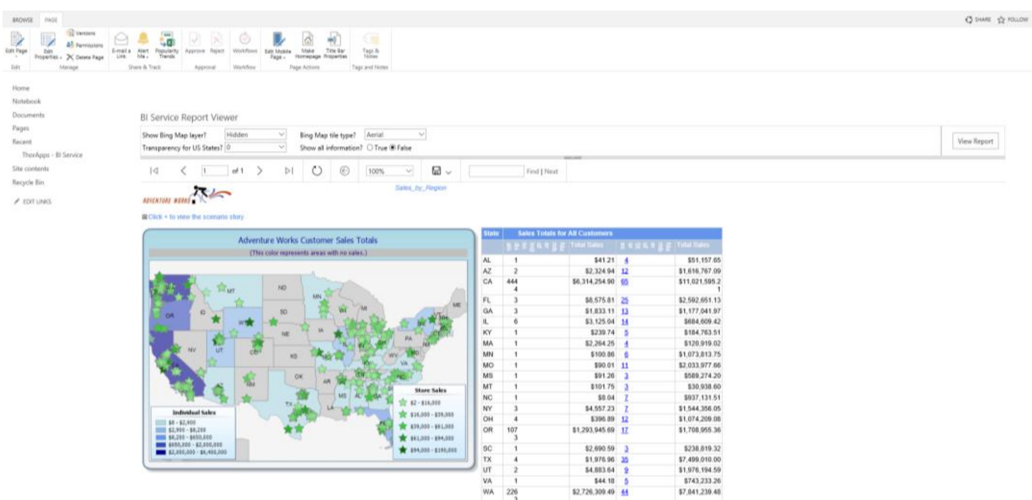
Enter a report path excluding the report file extension, scroll down and click “**OK**”.



Click “**Stop Editing**”.



And now your report is published.

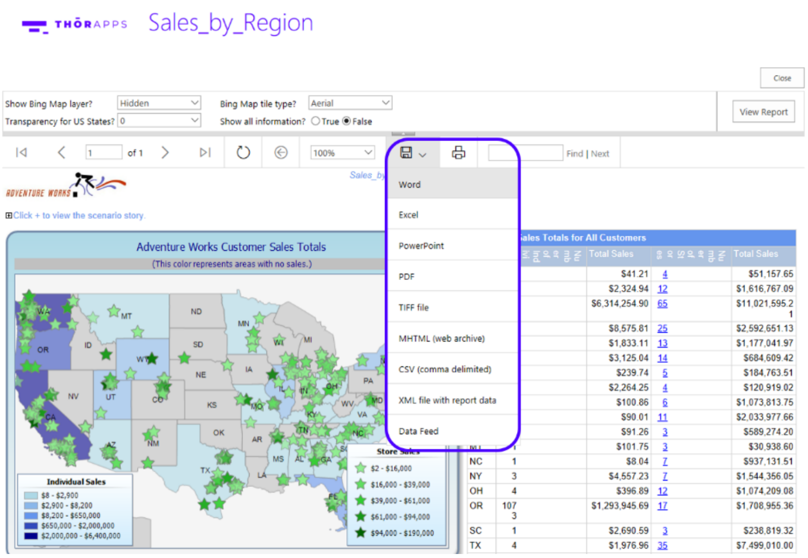


EXPORTING AND SCHEDULING YOUR REPORTS

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.



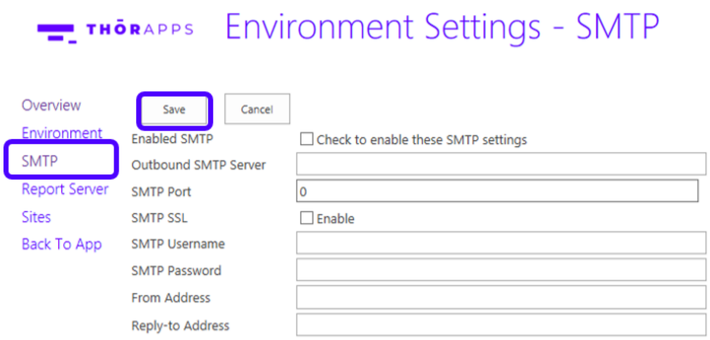
This will trigger an automatic download to your computer.

How to schedule your report

IMPORTANT: Scheduling reports are only available under admin level.

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

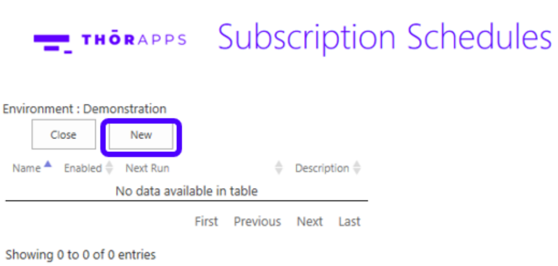
Select the **SMTP** option, fill the required information and click "**Save**".



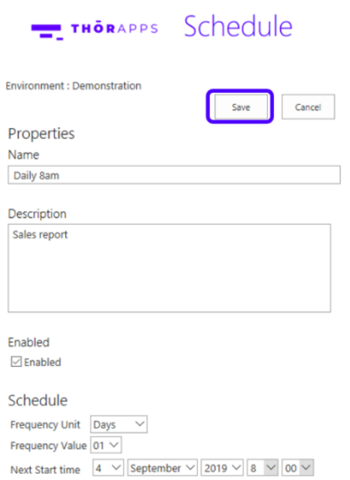
Click “**Back To App**” on the left side.

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

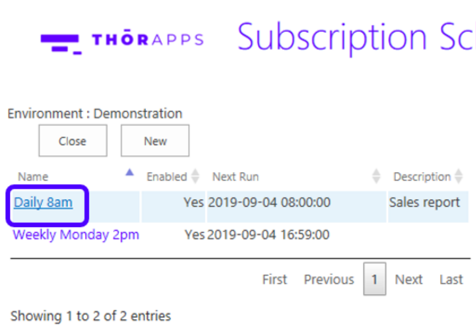
Click “**New**”.



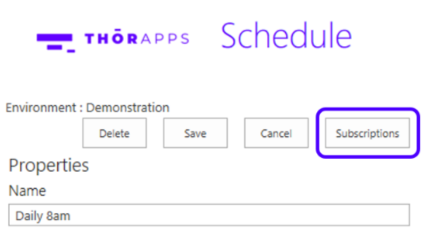
Fill the information and choose the desired frequency and time.



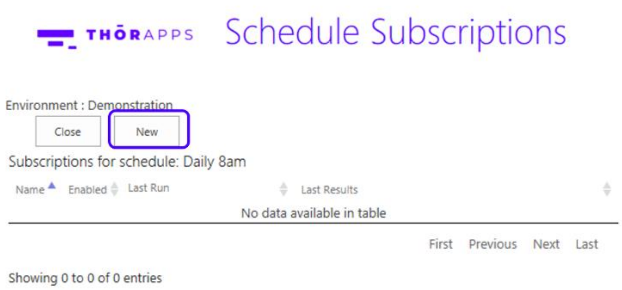
Back to the **Subscription Schedules**, click on the report you have created.



Click “**Subscriptions**”.



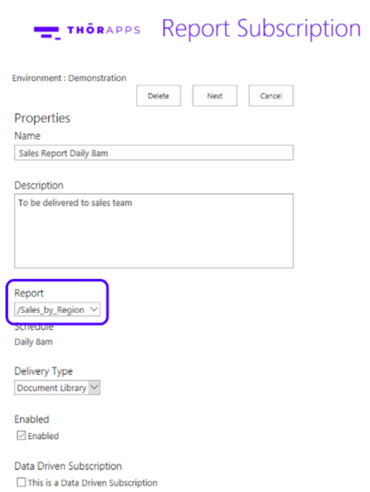
Click “**New**” to create a schedule subscription.



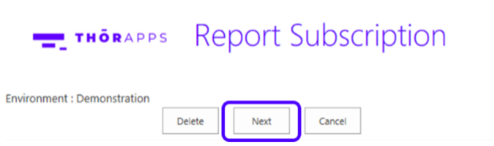
Fill the name and description.

Select your report.

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



Click "**Next**".

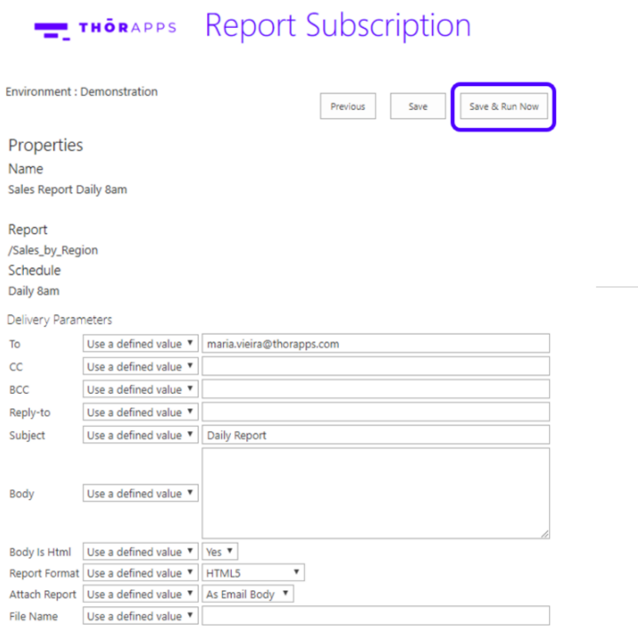


Check the information and click "**Next**".

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.



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.