

Reporting Services Link Setup

Background

Analyzer has the ability to open any Reporting Services reports within Analyzer's own report. In addition, if a Reporting Services report has parameters defined, Analyzer can send these parameters to the Reporting Services report to trigger a change. This document will provide you with step by step instructions that will enable you to setup a Reporting Services Report Link in Analyzer.

Prerequisites

You should have access to Analyzer.

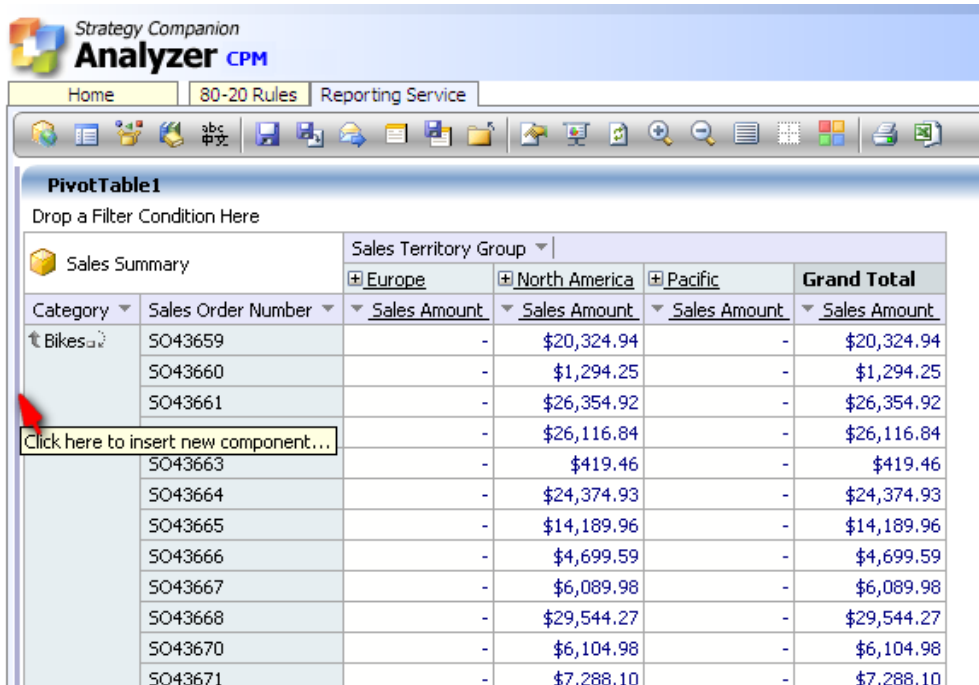
You should have access to Reporting Services.

You should know the name of the Reporting Services Server.

If Reporting Services utilizes Basic Authentication, you will also need to know the correct authentication User ID and Password.

Setup Procedures

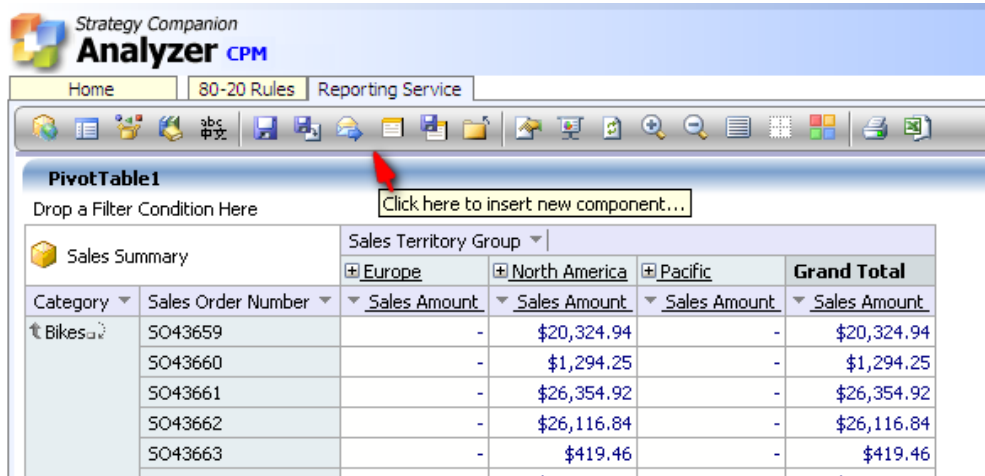
1. In order to add a Reporting Services (RS) Link to an Analyzer report, simply move your mouse to the edge of any existing component in the report. A solid gray bar should appear when the cursor is in the correct spot:



The screenshot shows the Strategy Companion Analyzer CPM interface. A PivotTable titled 'PivotTable1' is displayed. The table has columns for 'Sales Territory Group' (Europe, North America, Pacific) and 'Grand Total'. The rows are categorized by 'Sales Order Number' (SO43659 to SO43671). A red arrow points to a gray bar on the left side of the row for SO43661, indicating where a new component can be inserted.

Sales Summary		Sales Territory Group			Grand Total
Category	Sales Order Number	Europe	North America	Pacific	Sales Amount
Bikes	SO43659	-	\$20,324.94	-	\$20,324.94
	SO43660	-	\$1,294.25	-	\$1,294.25
	SO43661	-	\$26,354.92	-	\$26,354.92
	SO43663	-	\$419.46	-	\$419.46
	SO43664	-	\$24,374.93	-	\$24,374.93
	SO43665	-	\$14,189.96	-	\$14,189.96
	SO43666	-	\$4,699.59	-	\$4,699.59
	SO43667	-	\$6,089.98	-	\$6,089.98
	SO43668	-	\$29,544.27	-	\$29,544.27
	SO43670	-	\$6,104.98	-	\$6,104.98
	SO43671	-	\$7,288.10	-	\$7,288.10

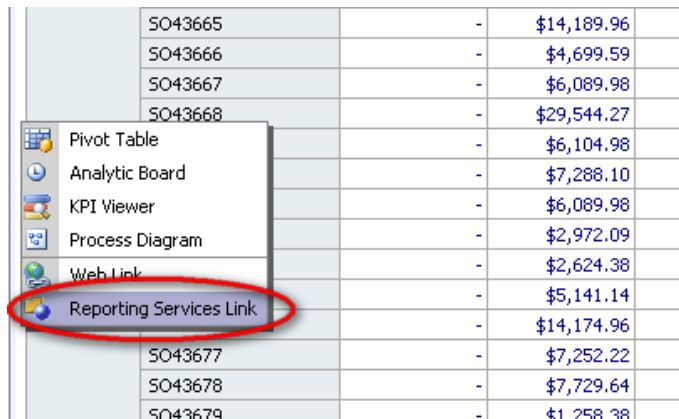
You have the option of adding a RS Link to any of the four sides of a component. The side of the component you click on will determine where the new component is placed. For example, you may place the RS Link above the pivot table by clicking on the top edge of the pivot table.



The screenshot shows the Strategy Companion Analyzer CPM interface. A pivot table titled "PivotTable1" is displayed. A red arrow points to a tooltip that says "Click here to insert new component...". The pivot table has the following structure:

Sales Summary		Sales Territory Group			
Category	Sales Order Number	Europe	North America	Pacific	Grand Total
Bikes	SO43659	-	\$20,324.94	-	\$20,324.94
	SO43660	-	\$1,294.25	-	\$1,294.25
	SO43661	-	\$26,354.92	-	\$26,354.92
	SO43662	-	\$26,116.84	-	\$26,116.84
	SO43663	-	\$419.46	-	\$419.46

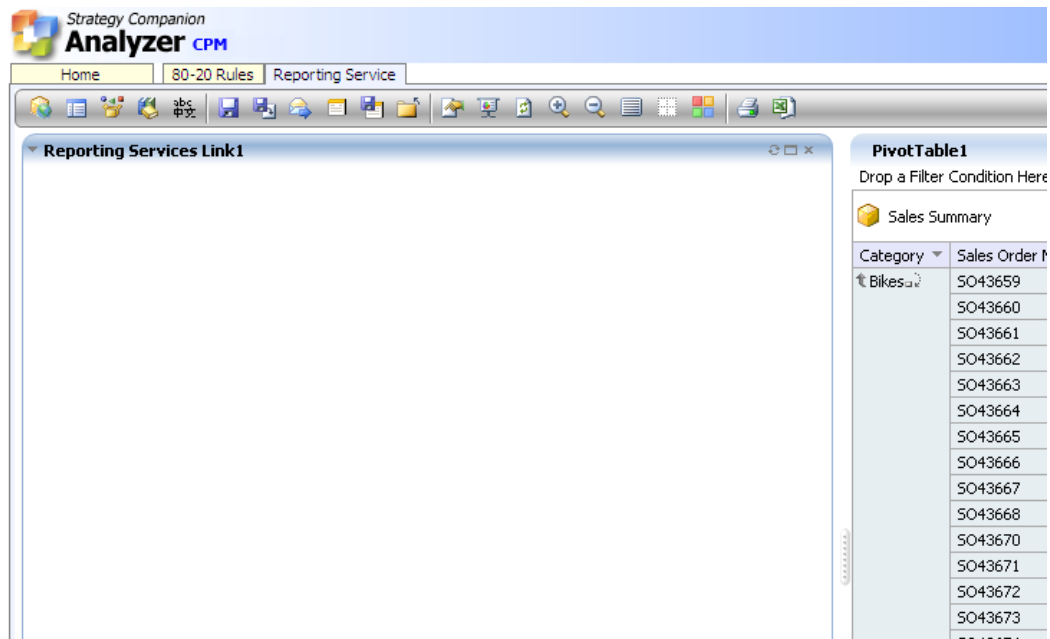
- Once the solid gray bar appears, click to see the component drop down menu. Select **"Reporting Services Link"** to create a new **RS Link** component. In this example, we will place a RS Link to the left side of the pivot table.



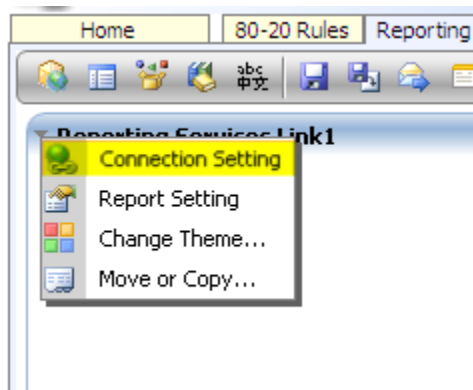
The screenshot shows a pivot table with a dropdown menu open over it. The dropdown menu lists several options, with "Reporting Services Link" circled in red. The pivot table data is as follows:

	SO43665	-	\$14,189.96	
	SO43666	-	\$4,699.59	
	SO43667	-	\$6,089.98	
	SO43668	-	\$29,544.27	
		-	\$6,104.98	
		-	\$7,288.10	
		-	\$6,089.98	
		-	\$2,972.09	
		-	\$2,624.38	
		-	\$5,141.14	
		-	\$14,174.96	
	SO43677	-	\$7,252.22	
	SO43678	-	\$7,729.64	
	SO43679	-	\$1,258.38	

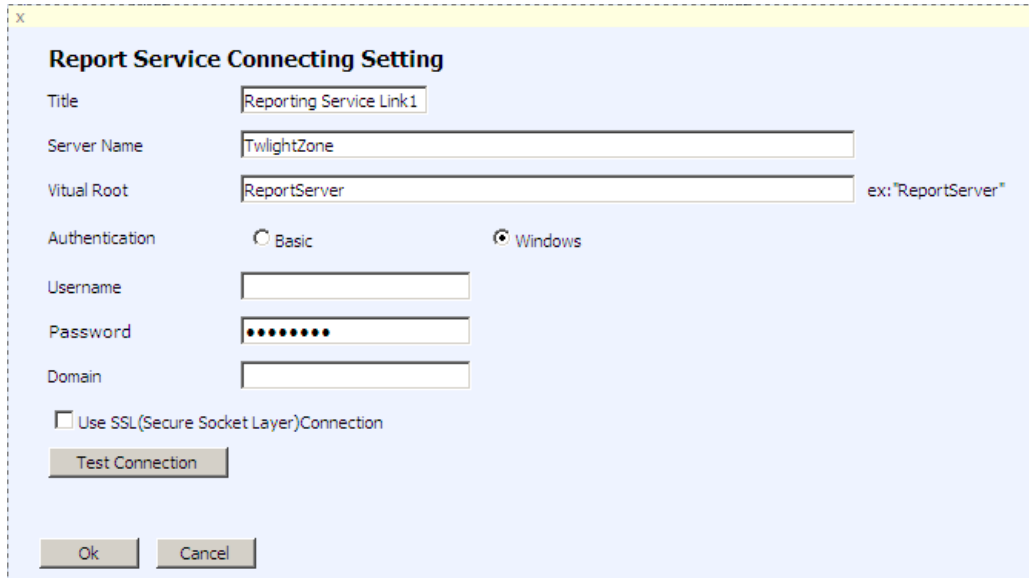
A new RS Link component appears:



3. Click the drop-down menu triangle on the top left hand side of the title bar to access the RS Link Menu. Select "**Connection Setting**" to setup the server connection information.

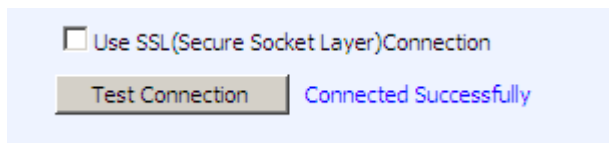


- Under “**Connection Setting**”, set up the basic information that will allow you to connect to the RS server.

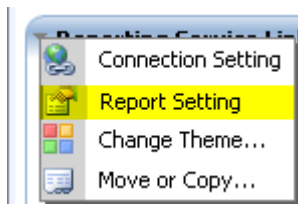


Title	Specify a new Title for this component.
Server Name	Specify the Name of the Server.
Virtual Root	Specify the name of the Virtual Root. If there is an instance, make sure to specify it.
Authentication	You will select Basic Authentication or Windows Authentication depending on how the RS server is configured. If Basic Authentication is used, you will need to specify a Username and Password. If Windows Authentication is used, disregard the Username and Password section.
Username	Leave this field blank if the RS server uses Windows Authentication; otherwise, specify a correct Username.
Password	Leave this field blank if the RS server uses Windows Authentication; otherwise, specify a correct Password for the Username.
Domain	Specify a Domain if necessary.
Use SSL	Check this box if the RS server is using SSL.
Test Connection	Test the connection with the current setting information.
OK	Accept the changes.
Cancel	Leave without accepting the changes.

- Once you have specified the necessary RS server information, click on the “**Test Connection**” button to verify that you can successfully connect to the RS server. Make sure you receive a “**Connected Successfully**” message before you click “**OK**” to accept the changes.

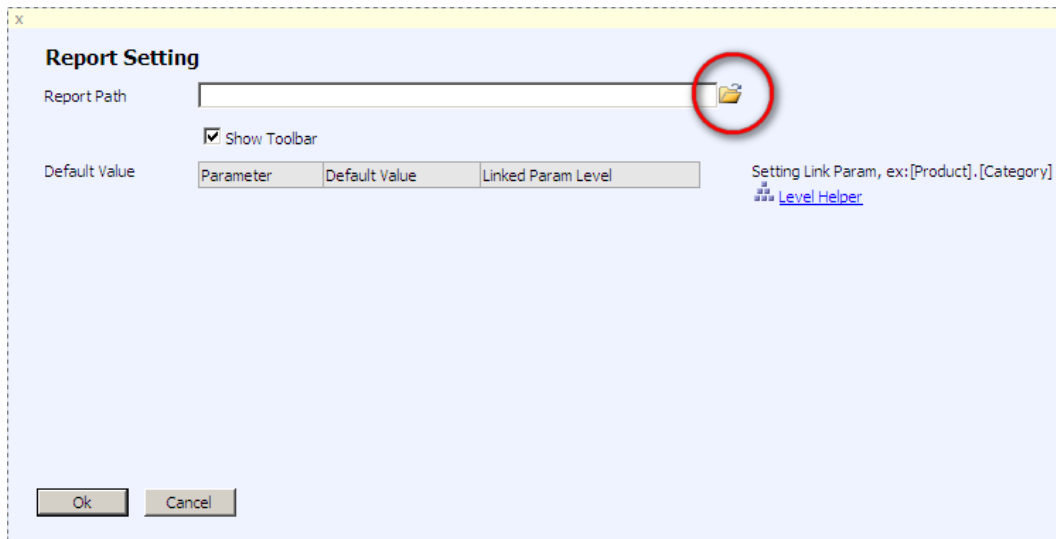


6. Click on the RS Link drop down menu again. Select “**Report Setting**”. This will allow you to configure which report will open.

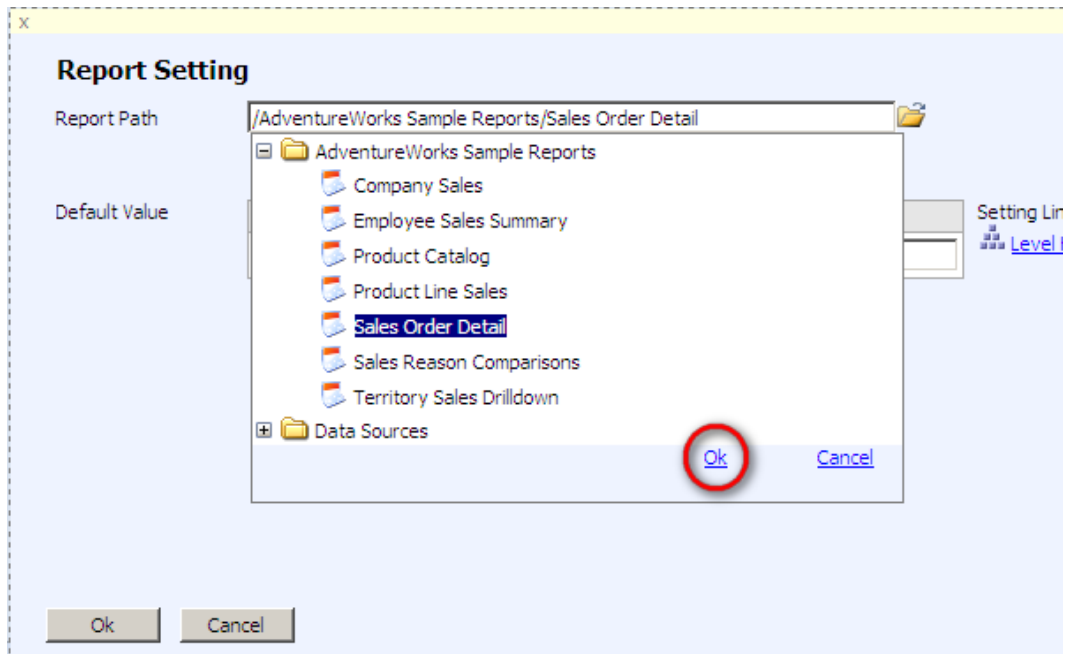


7. The **Report Setting** dialog will allow you to specify which report to use. If a parameter exists, you may also set the parameters that should be used to receive information sent by the pivot table.

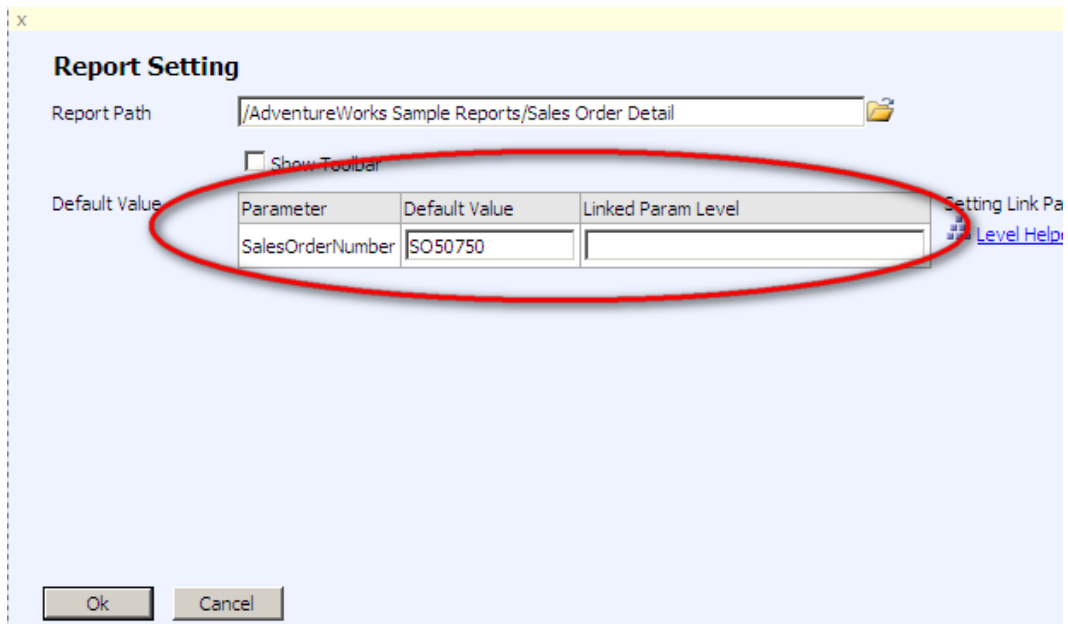
Click the “**Open**” icon next to the “**Report Path**” entry field to specify the report to use.



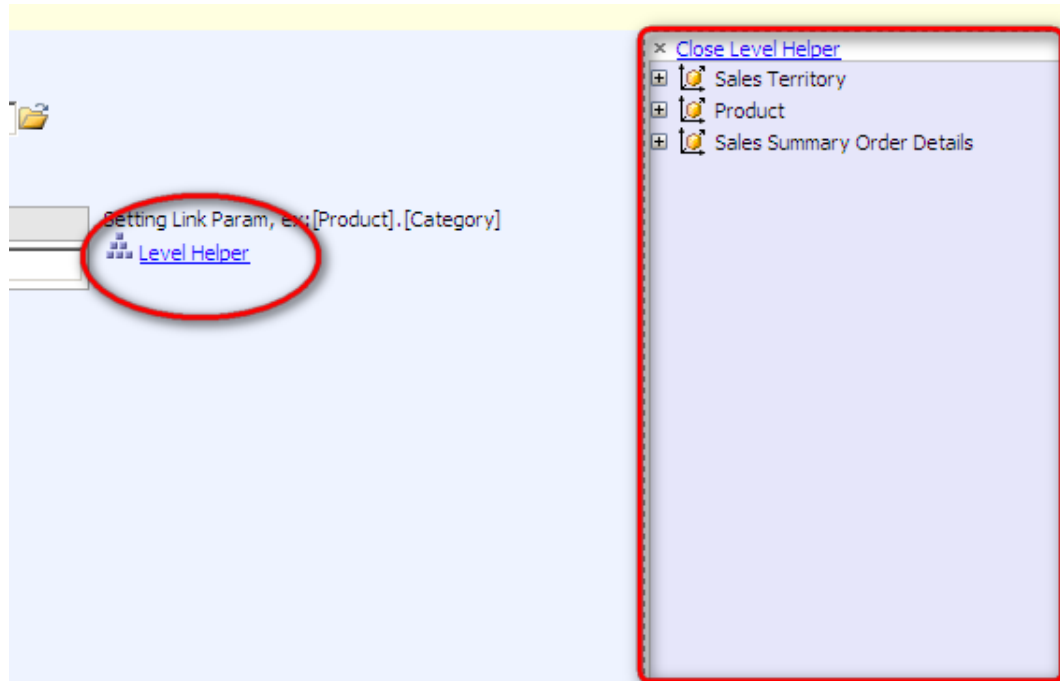
- Expand the folder tree structure to locate your report. Once it is located, click on the report title to select it. Click “OK” to accept it.



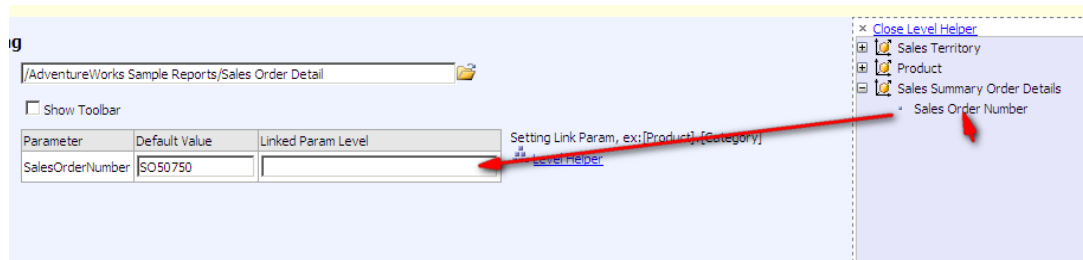
- You should see the report you selected listed in the entry field. If this report has parameters setup, it will be listed inside the table below. In this example, there is a single parameter, “SalesOrderNumber”, within the RS report.



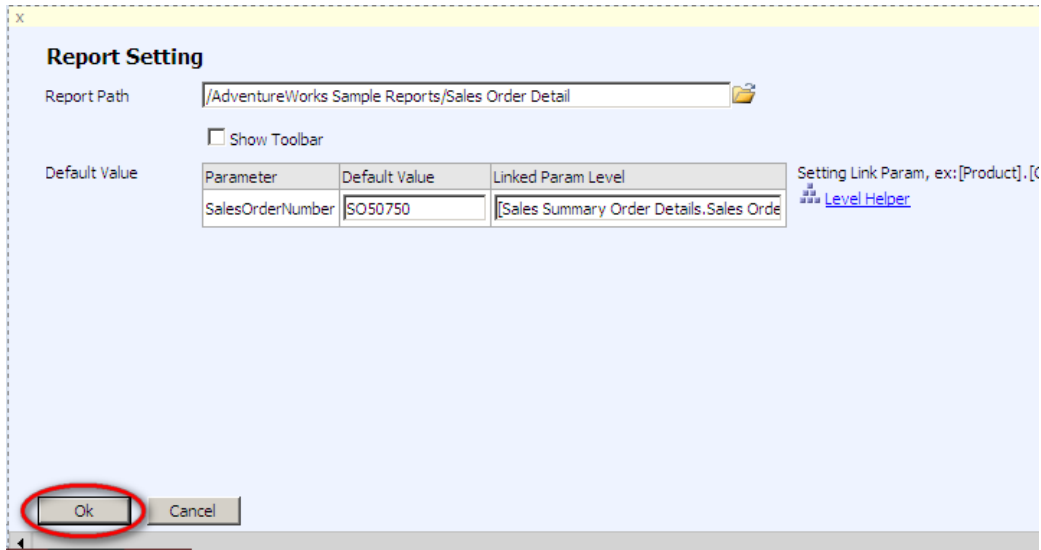
10. If the RS report is setup correctly, you can configure it so that it can receive a parameter from the pivot table. The easiest way to obtain this information is to use the “**Level Helper**”.



11. Since the parameter is related to **Sales Order Number**, select **Sales Order Number** from the Level Helper tree and drag it into the “**Linked Param Level**” field. Please note that the contents of the Level Helper will change according to the dimension(s) in the pivot table. Ultimately it is the report designer’s responsibility to know which pivot table parameter will match the RS report parameter, since the RS report will only update correctly if the proper information is set.



12. Click the "OK" button to accept the changes.



Report Setting

Report Path: /AdventureWorks Sample Reports/Sales Order Detail

Show Toolbar


Parameter	Default Value	Linked Param Level
SalesOrderNumber	SO50750	[Sales Summary Order Details.Sales Order

Setting Link Param, ex: [Product].[...]
[Level Helper](#)

Ok **Cancel**

13. You should see the RS report displayed next to the pivot table.

Reporting Service Link1



Sales Order
Order # S043666

Bill To: Wheel Gallery 9920 Bridgepointe Parkway San Mateo California 94404 United States	Ship To: Wheel Gallery 9920 Bridgepointe Parkway San Mateo California 94404 United States
Contact: Abraham Swearengin Ph: 926-555-0136	
Date: 4/17/2007	Order Date: 7/1/2001
Sales Person: Linda Mitchell, Sales Representative	Purchase Order: PO16008173883
	Shipment Method: CARGO TRANSPORT 5

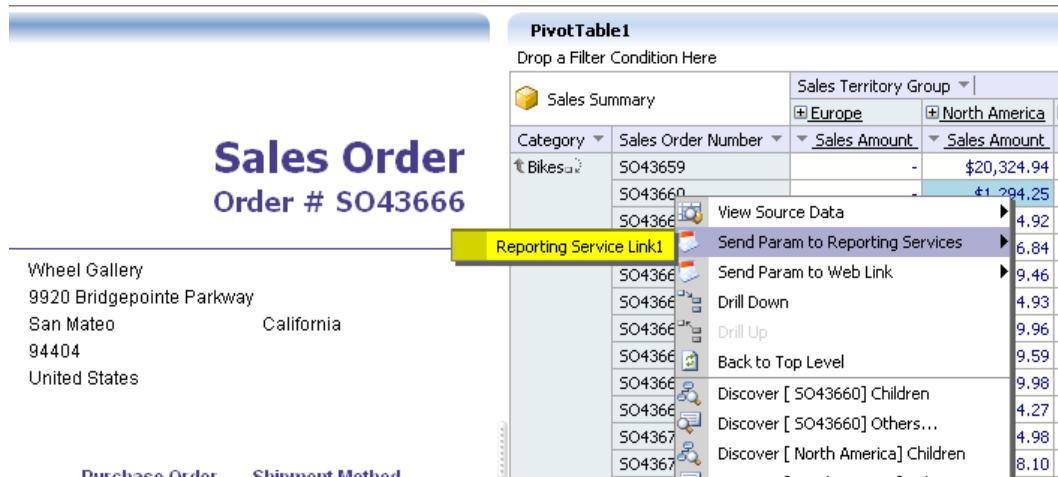
Line	Qty	Item Number	Description	Tracking #	Unit Price	Subtotal	Discount	Item Total
1	1	BK-R50R-52	Road-650 Red, 52	D46A-40CA-8D	\$419.46	\$419.46	\$0.00	\$419.4
2	1	BK-R93R-56	Road-150 Red, 56	D46A-40CA-8D	\$2,146.96	\$2,146.96	\$0.00	\$2,146.9
3	1	FR-R72R-48	ML Road Frame - Red, 48	D46A-40CA-8D	\$356.90	\$356.90	\$0.00	\$356.9
4	1	BK-R68R-44	Road-450 Red, 44	D46A-40CA-8D	\$874.79	\$874.79	\$0.00	\$874.7
5	2	BK-R50B-44	Road-650 Black, 44	D46A-40CA-8D	\$419.46	\$838.92	\$0.00	\$838.9
6	1	BK-R50B-60	Road-650 Black, 60	D46A-40CA-8D	\$419.46	\$419.46	\$0.00	\$419.4
Total Discount: \$0.00							Total:	\$5,056.4

PivotTable1

Drop a Filter Condition Here

Category	Sales Order Number	Sales Amount	Sales Amount
Bikes	S043659	-	\$20,324
	S043660	-	\$1,294
	S043661	-	\$26,354
	S043662	-	\$26,116
	S043663	-	\$415
	S043664	-	\$24,374
	S043665	-	\$14,185
	S043666	-	\$4,695
	S043667	-	\$6,085
	S043668	-	\$29,544
	S043670	-	\$6,104
	S043671	-	\$7,286
	S043672	-	\$6,085
	S043673	-	\$2,972
	S043674	-	\$2,624
	S043675	-	\$5,141
	S043676	-	\$14,174
	S043677	-	\$7,252
	S043678	-	\$7,275
	S043679	-	\$1,256
	S043680	-	\$10,273
	S043681	-	\$11,936
	S043682	-	\$3,846
	S043683	-	\$42,504
	S043684	-	\$5,596
	S043685	-	\$2,552
	S043686	-	\$3,463

- We are now able to send a parameter containing the Order Number from the pivot table to the RS report. Simply right click on one of the **Sales Amount** cells in the pivot table, and select “**Send Param to Reporting Services**”. A sub menu will list all of the RS Report Links within the report enabling you to select the one that you wish to send the parameter to.



Sales Order
Order # SO43666

Wheel Gallery
9920 Bridgepointe Parkway
San Mateo California
94404
United States

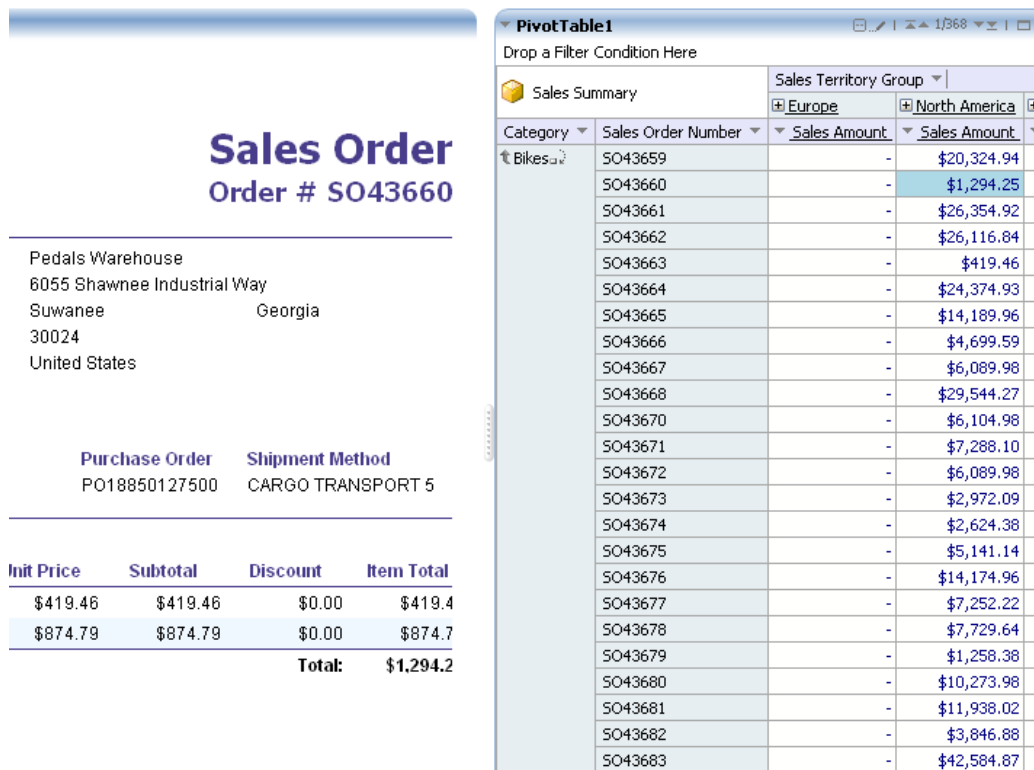
PivotTable1
Drop a Filter Condition Here

Sales Summary		Sales Territory Group	
Category	Sales Order Number	Europe	North America
Bikes	SO43659	-	\$20,324.94
	SO43660	-	\$1,294.25
	SO43661	-	\$26,354.92
	SO43662	-	\$26,116.84
	SO43663	-	\$419.46
	SO43664	-	\$24,374.93
	SO43665	-	\$14,189.96
	SO43666	-	\$4,699.59
	SO43667	-	\$6,089.98
	SO43668	-	\$29,544.27
	SO43670	-	\$6,104.98
	SO43671	-	\$7,288.10
	SO43672	-	\$6,089.98
	SO43673	-	\$2,972.09
	SO43674	-	\$2,624.38
	SO43675	-	\$5,141.14
	SO43676	-	\$14,174.96
	SO43677	-	\$7,252.22
	SO43678	-	\$7,729.64
	SO43679	-	\$1,258.38
	SO43680	-	\$10,273.98
	SO43681	-	\$11,938.02
	SO43682	-	\$3,846.88
	SO43683	-	\$42,584.87

Reporting Service Link1

Purchase Order Shipment Method

- Once the Sales Order report has been updated by the parameter, you will see that the Order Number has changed, reflecting the selection made in the pivot table.



Sales Order
Order # SO43660

Pedals Warehouse
6055 Shawnee Industrial Way
Suwanee Georgia
30024
United States

PivotTable1
Drop a Filter Condition Here

Sales Summary		Sales Territory Group	
Category	Sales Order Number	Europe	North America
Bikes	SO43659	-	\$20,324.94
	SO43660	-	\$1,294.25
	SO43661	-	\$26,354.92
	SO43662	-	\$26,116.84
	SO43663	-	\$419.46
	SO43664	-	\$24,374.93
	SO43665	-	\$14,189.96
	SO43666	-	\$4,699.59
	SO43667	-	\$6,089.98
	SO43668	-	\$29,544.27
	SO43670	-	\$6,104.98
	SO43671	-	\$7,288.10
	SO43672	-	\$6,089.98
	SO43673	-	\$2,972.09
	SO43674	-	\$2,624.38
	SO43675	-	\$5,141.14
	SO43676	-	\$14,174.96
	SO43677	-	\$7,252.22
	SO43678	-	\$7,729.64
	SO43679	-	\$1,258.38
	SO43680	-	\$10,273.98
	SO43681	-	\$11,938.02
	SO43682	-	\$3,846.88
	SO43683	-	\$42,584.87

Purchase Order Shipment Method
PO18850127500 CARGO TRANSPORT 5

Init Price	Subtotal	Discount	Item Total
\$419.46	\$419.46	\$0.00	\$419.4
\$874.79	\$874.79	\$0.00	\$874.7
		Total:	\$1,294.2