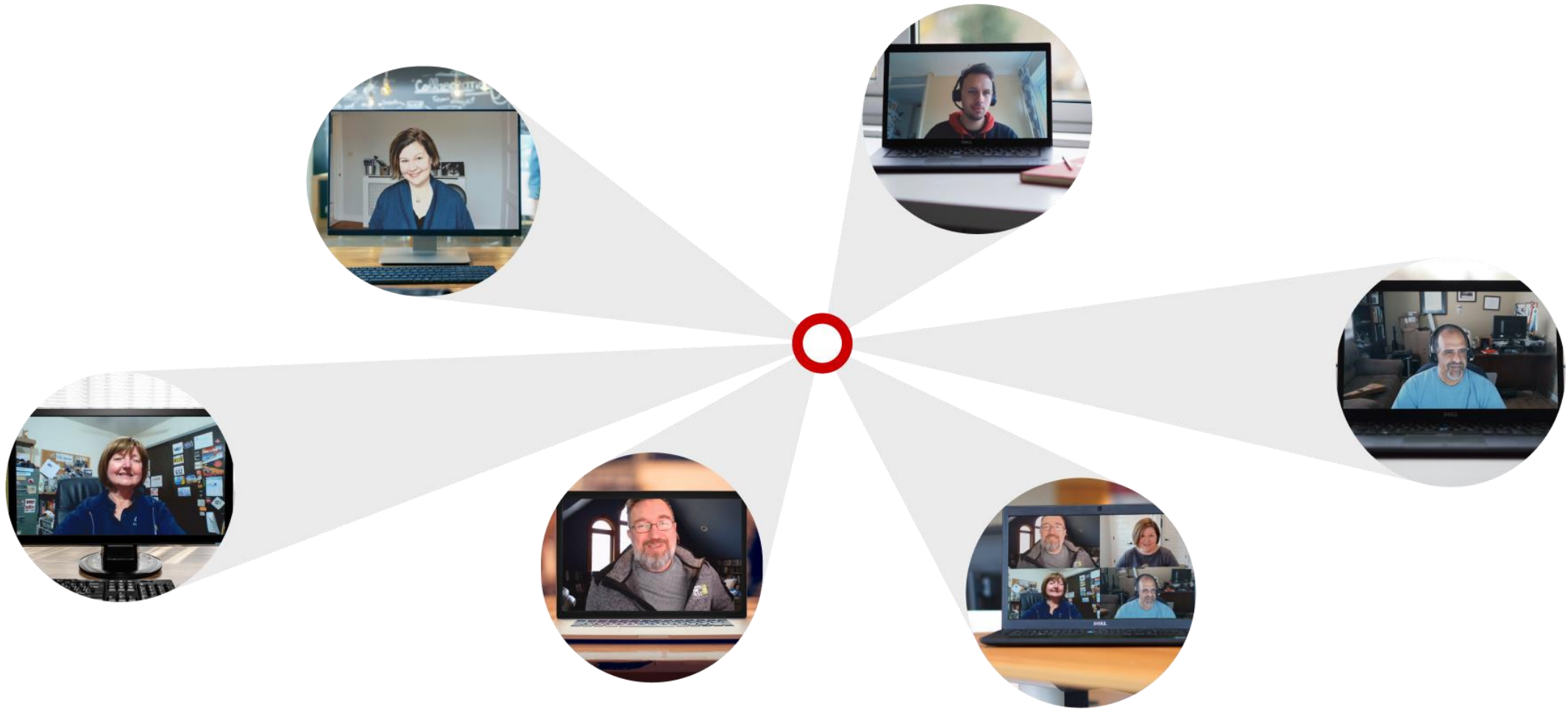


Community Circle



Intro to SQL Server Reporting Services

Kathi Kellenberger

Simple Talk Editor and DevOps Advocate



Agenda

- Introduction, tools, and setup
- Data sources, datasets, and your first report
- Parameters
- Grouping
- Interactive report features
- Visualizations
- Deploying and managing reports

Agenda

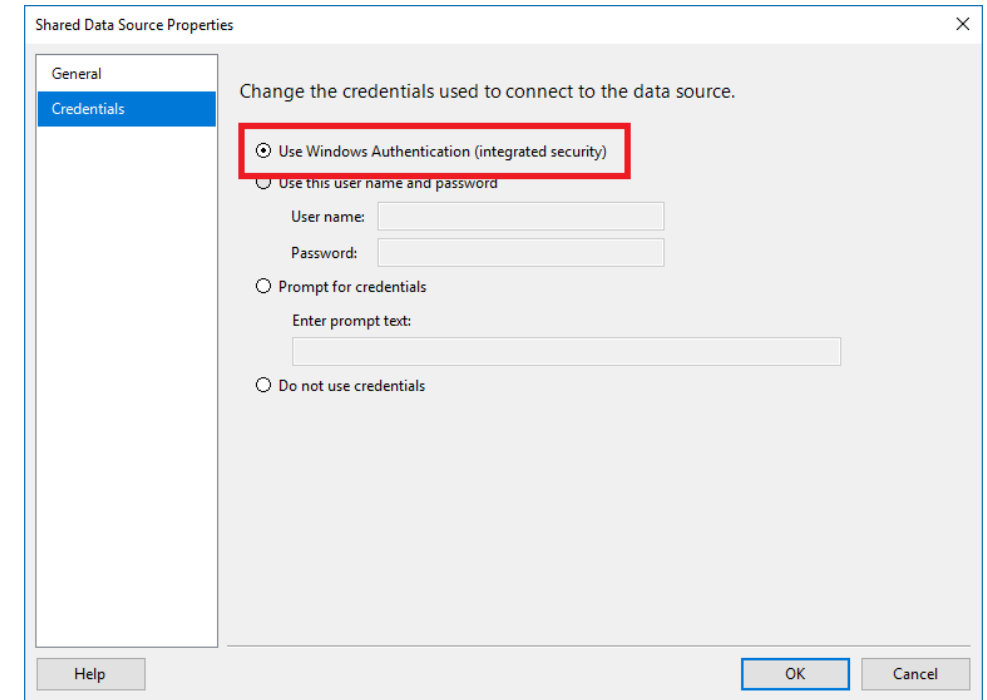
- Introduction, tools, and setup
- Data sources, datasets, and your first report
- Parameters
- **Grouping**
- Interactive report features
- Visualizations
- Deploying and managing reports

Resources

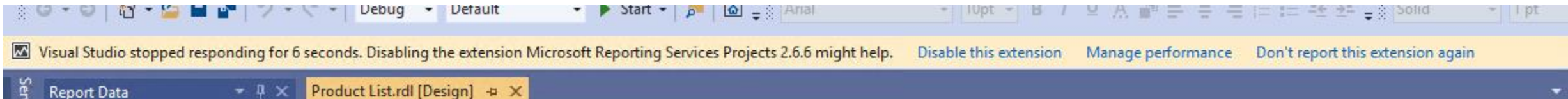
- Live class through Zoom
- Watch videos on Redgate's Community Circle Playlist or Redgate University
- <https://github.com/KathiKellenberger/SSRS>
- <https://forum.red-gate.com/categories/data-platform-course%3A-introduction-to-sql-server-reporting-services>
- <https://www.red-gate.com/simple-talk/sql/bi/reporting-services-basics-adding-groups-to-reports/>

Housekeeping

- Data source error.
Go back to Credentials page.



- Don't disable SSRS in Visual Studio!



Report development approach

- How did you receive the requirements?
 - Design document
 - Verbal request or “drive by”
- Get clarifications
 - Organization
 - Summary totals, etc. needed
 - Parameters
 - Sorting
- Create a “mock up” report

Report requirements

“We would like a report that shows sales by territory and year.”

Questions for the manager

- How to determine territory?
- What fields should display on report?
- Any calculations or subtotals?
- Territory → Year or Year → Territory ?
- What is the lowest detail required?

Interview answers

- The query will be provided.
- Group first by year, then by territory
- For each year, show the total sales and average sales over the territories.

More interview answers

- Display store name, customer ID and sales as the lowest detail
- Sort the detail by total sales in descending order.
- Sort the years by descending order.
- Sort the territories alphabetically.

Report layout

YEAR

Territory ID
Customer ID

AVERAGE

Territory Name
Store Name

TOTAL

Total
Total

Query

```
SELECT YEAR(SOH.OrderDate) AS OrderYear, Cust.CustomerID,  
SUM(SOH.TotalDue) AS Sales,  
Ter.TerritoryID, Ter.Name AS TerritoryName, s.Name AS Storename  
FROM Sales.SalesOrderHeader AS SOH  
INNER JOIN Sales.SalesTerritory AS Ter ON SOH.TerritoryID = Ter.TerritoryID  
INNER JOIN Sales.Customer AS Cust ON Cust.CustomerID = SOH.CustomerID  
INNER JOIN Sales.Store AS S ON s.BusinessEntityID = Cust.StoreID  
GROUP BY Cust.CustomerID, Ter.TerritoryID, Ter.Name,  
YEAR(OrderDate), S.Name;
```

Original report

Sales by Year and Territory				
Order Year			Avg Sales	Total Sales
2014			\$1,316,752	\$13,167,521
	Territory ID	Territory Name		Total Sales
	9	Australia		\$683,470
		Customer ID	Store Name	Total Sales
		29488	Nationwide Supply	\$128,690
		30092	Cycle Parts and Accessories	\$66,267
		29821	Bike Part Wholesalers	\$59,272
		30097	Helpful Sales and Repair Service	\$56,467
		29823	Popular Bike Lines	\$54,683
		29628	Budget Toy Store	\$46,945
		29706	Rich Department Store	\$46,884
		30059	Gears and Parts Company	\$36,782

Compact report

Sales by Year and Territory

2014	Average Sales: \$1,316,752	\$13,167,521
9 Australia		\$683,470
Customer ID	Store Name	Sales
29488	Nationwide Supply	\$128,690
30092	Cycle Parts and Accessories	\$66,267
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29823	Popular Bike Lines	\$54,683
29628	Budget Toy Store	\$46,945
29706	Rich Department Store	\$46,884
30059	Gears and Parts Company	\$36,782
30073	Liquidation Sales	\$36,595

Matrix report

Sales by Year and Territory

Territory ID	Territory Name	2011	2012	2013	2014	Total
1	Northwest	\$2,054,524	\$4,443,540	\$5,384,411	\$2,146,083	\$14,028,558
2	Northeast	\$705,672	\$3,272,240	\$2,961,184	\$873,896	\$7,812,991
3	Central	\$1,126,646	\$3,334,868	\$3,371,278	\$1,077,192	\$8,909,983
4	Southwest	\$2,263,413	\$7,976,842	\$8,120,605	\$2,471,177	\$20,832,038
5	Southeast	\$1,847,745	\$3,342,953	\$2,700,616	\$979,262	\$8,870,575
6	Canada	\$1,888,952	\$5,950,810	\$6,310,918	\$2,062,731	\$16,213,411
7	France		\$1,166,211	\$3,054,174	\$977,725	\$5,198,110
8	Germany			\$1,563,714	\$717,890	\$2,281,604
9	Australia			\$1,118,500	\$683,470	\$1,801,970
10	United Kingdom		\$1,126,623	\$2,521,488	\$1,178,095	\$4,826,207
Total		\$9,886,952	\$30,614,087	\$37,106,887	\$13,167,521	\$90,775,447