

A decorative graphic on the left side of the slide, consisting of a network of light blue lines and small circles, resembling a circuit board or a stylized tree structure, extending from the top to the bottom.

# SSRS: GROUPING LEVELS ON REPORTS

# REPORT DEVELOPMENT APPROACH

- Receive requirements
  - Design document
  - A verbal request
- Get clarifications
  - Organization
  - Totals needed
  - Parameters
  - Sorting
- Mock up report

## REPORT REQUIREMENTS

**We would like a report  
that shows sales  
by territory and year**

Example taken from Beginning SQL Server Reporting Services by Kathi Kellenberger (Apress 2016)

# QUESTIONS FOR THE MANAGER

- How to determine the territory
- What fields should show up on the report?
- Calculations and subtotals?
- Territory → Year or Year → Territory?
- What is the lowest detail required?

# INTERVIEW ANSWERS

- The query will be provided
- Group by year, then by territory
- For each year, show the total sales and average sales over the territories
- For each territory, display the territory name, ID, and total sales
- Display store name, customer id, and total 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

Average

Total

Territory ID

Territory Name

Total

Customer ID

Store Name

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
	<b>Territory ID</b>	<b>Territory Name</b>		<b>Total Sales</b>
	9	Australia		\$683,470
		<b>Customer ID</b>	<b>Store Name</b>	<b>Total Sales</b>
		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
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
29973	Liquidation Sales	\$26,585

# 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