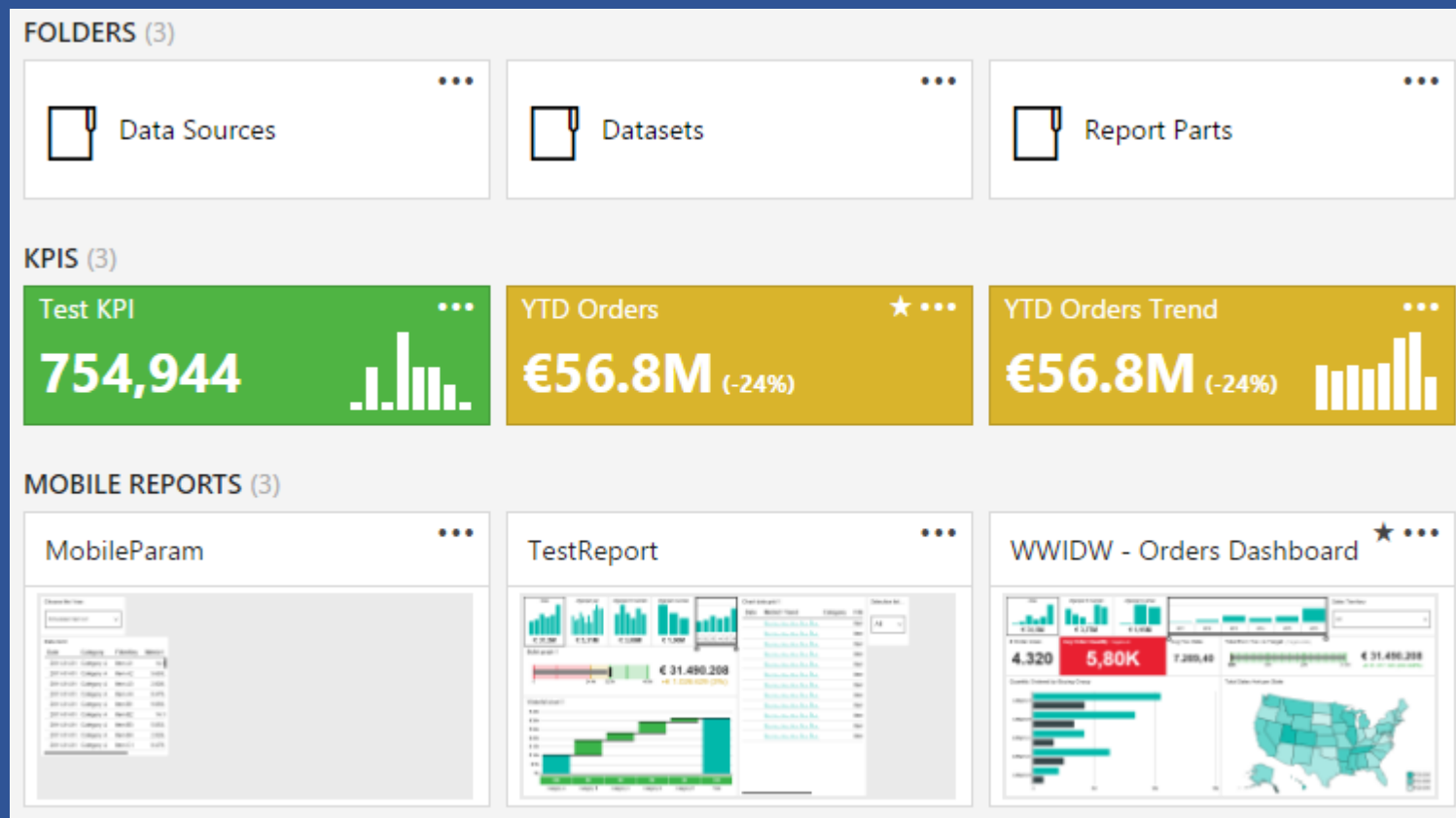


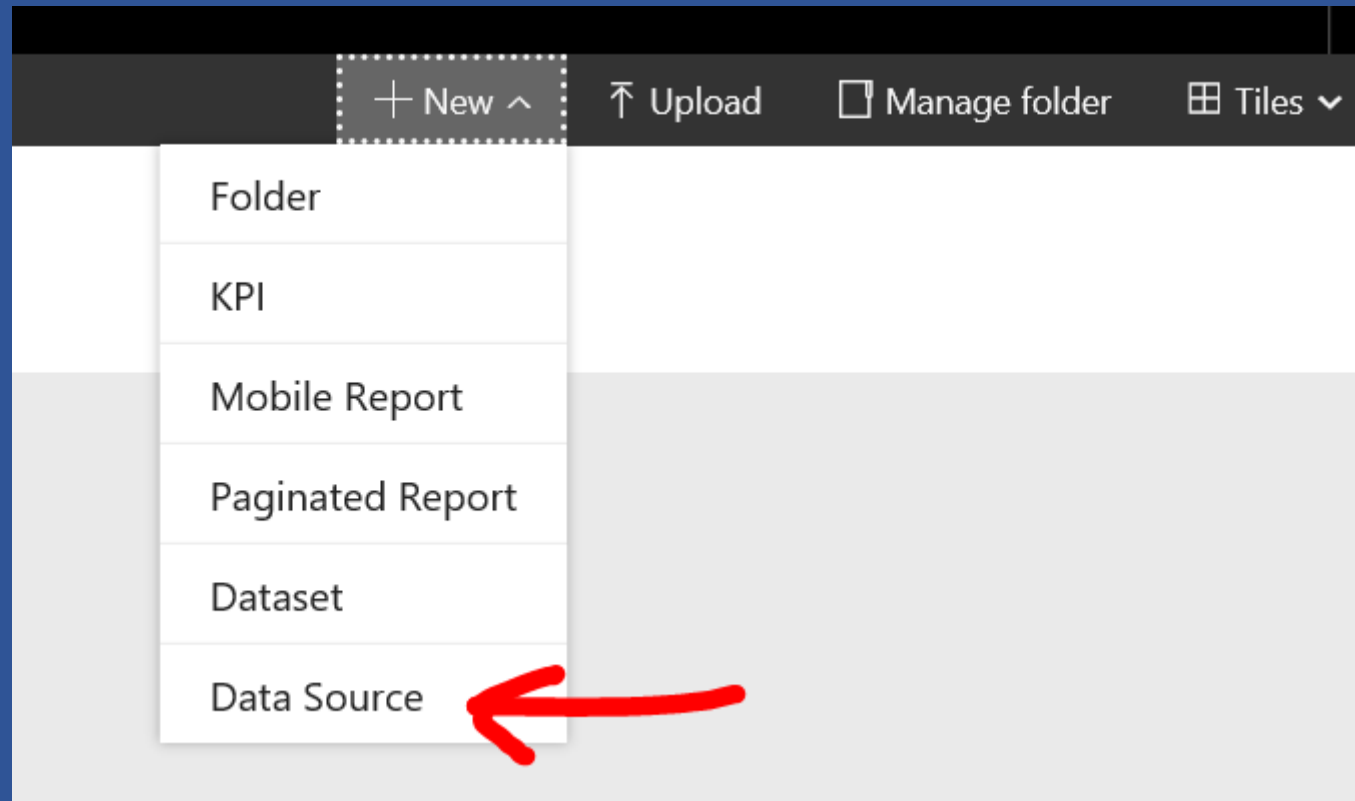
# Working with KPIs in Reporting



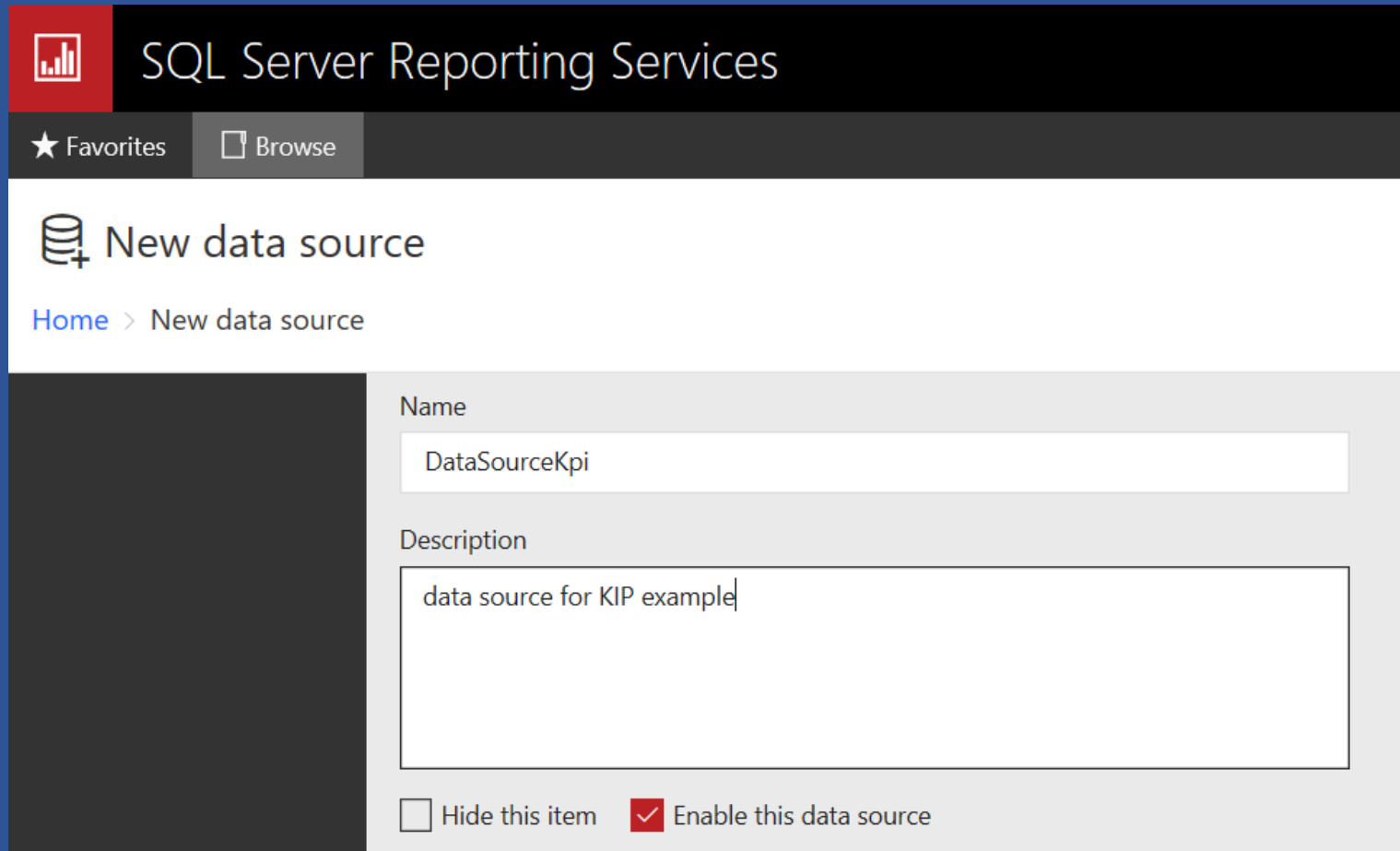
## What is KPI in SSRS?

A Key Performance Indicator (KPI) is a visual cue that communicates the amount of progress made toward a goal.

## Create a shared data source




## Set Data Source Name



SQL Server Reporting Services

★ Favorites Browse

 New data source

[Home](#) > New data source

Name

DataSourceKpi

Description

data source for KIP example

☐ Hide this item ☒ Enable this data source

## Set connection and Credentials

**Connection**

Type

Microsoft SQL Server

Connection string [Learn more](#)

Data Source=pc1\s1;Initial Catalog=Loy

**Credentials**

Log into the data source

☐ As the user viewing the report

☒ Using the following credentials

Type of credentials

Database user name and password

User name

sa

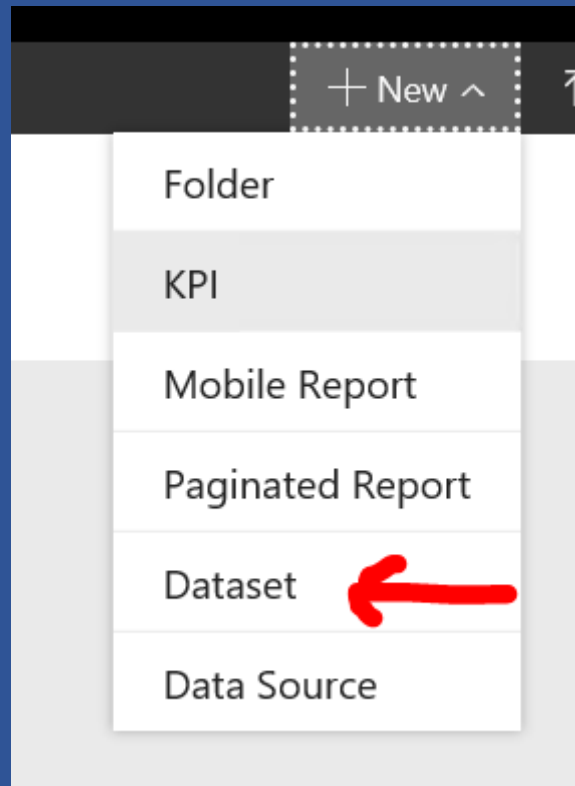
Password

•••••

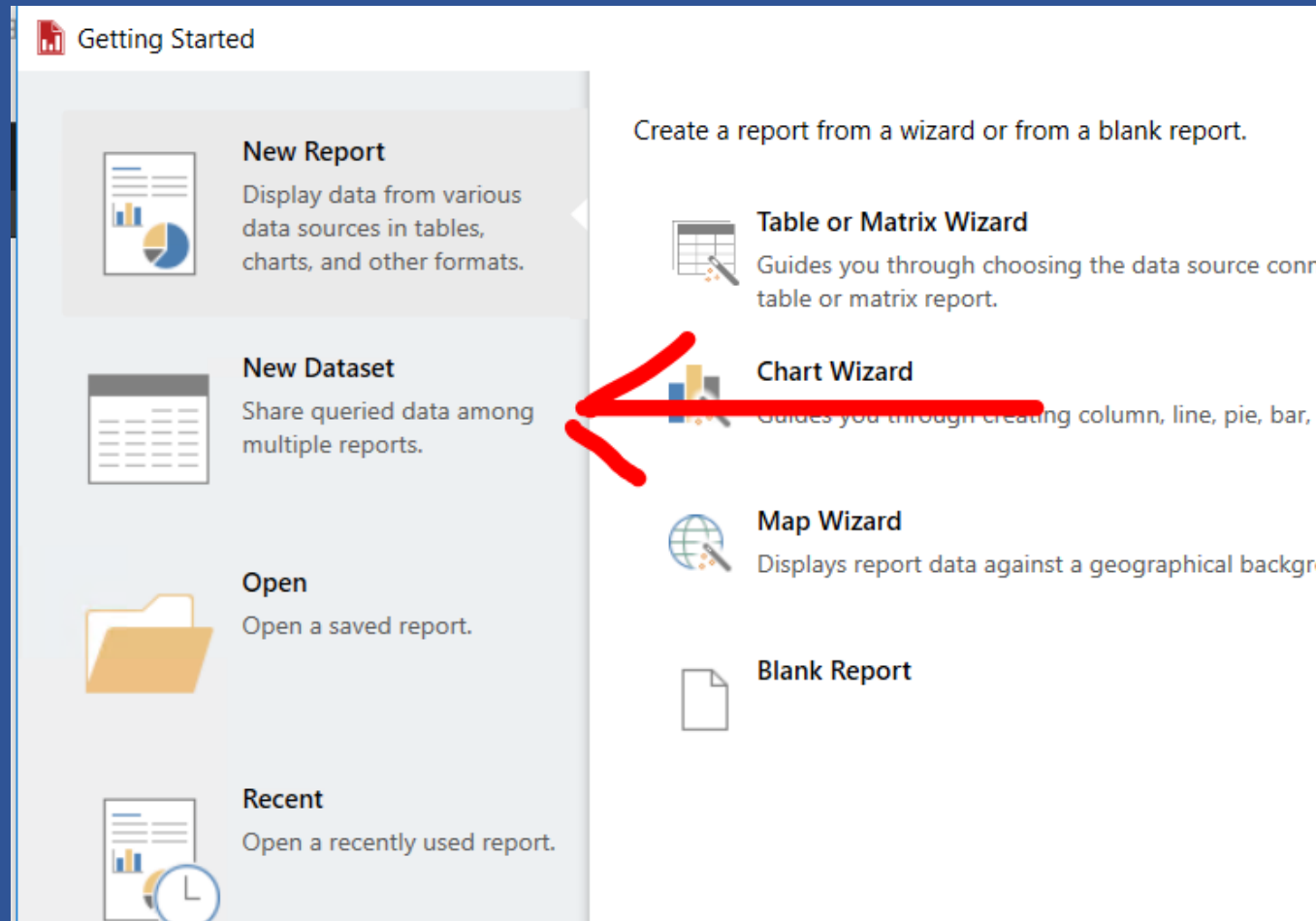
## Test this Query in SSMS

```
SELECT id, Product, Saleyear,  
       Amount as Value, Goal,  
       CASE  
           WHEN Goal > Amount THEN -1  
           WHEN Goal < Amount THEN 1  
       ELSE  
           0  
       END AS Status  
FROM  
    (  
        SELECT * ,  
        (SELECT AVG(S1.Amount)*1.1  
         FROM Sales3Years S1) as Goal  
        FROM Sales3Years  
    ) as tmp_tbl  
WHERE Product = 'Apple' and SaleYear = 2020  
order by SaleYear ASC
```

## Create Dataset / Install Report Builder (if not already did)

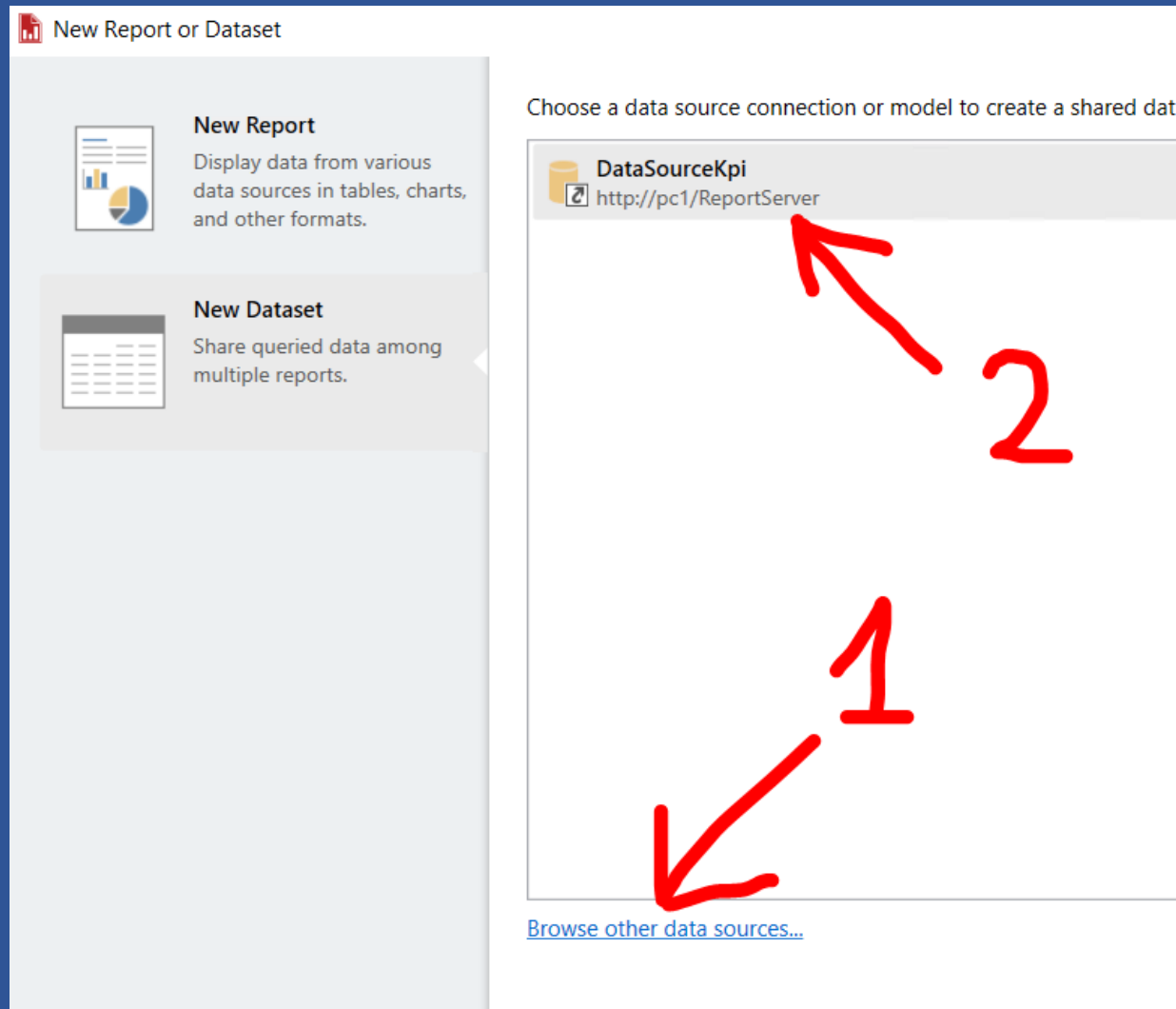


# New Dataset

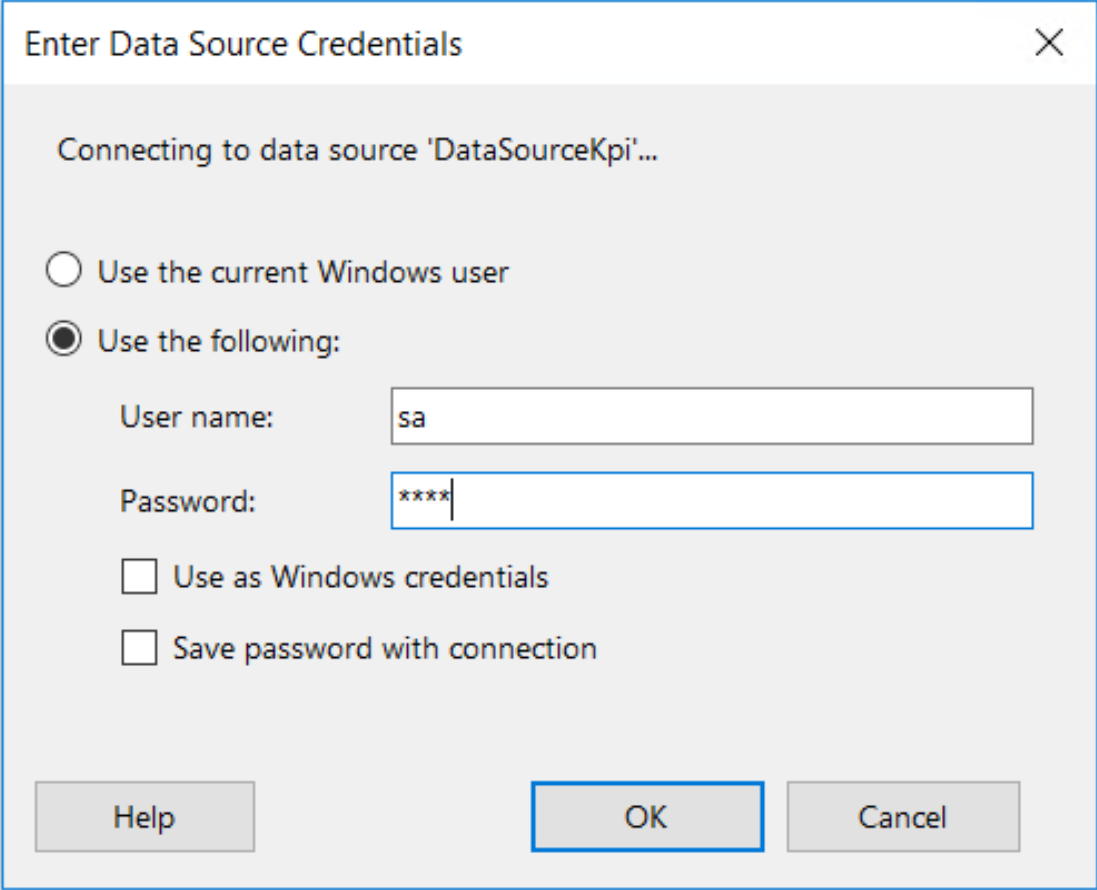




## Choose DataSourceKpi



## Enter Data Source Credentials



The screenshot shows a standard Windows-style dialog box titled "Enter Data Source Credentials" with a close button (X) in the top right corner. The main text inside the dialog reads "Connecting to data source 'DataSourceKpi'...". Below this, there are two radio button options: "Use the current Windows user" (which is unselected) and "Use the following:" (which is selected). Under the selected option, there are two text input fields: "User name:" containing the text "sa" and "Password:" containing four asterisks "\*\*\*\*". Below these fields are two unchecked checkboxes: "Use as Windows credentials" and "Save password with connection". At the bottom of the dialog, there are three buttons: "Help", "OK", and "Cancel". The "OK" button is highlighted with a blue border.

Enter Data Source Credentials

Connecting to data source 'DataSourceKpi'...

☐ Use the current Windows user

☒ Use the following:

User name:

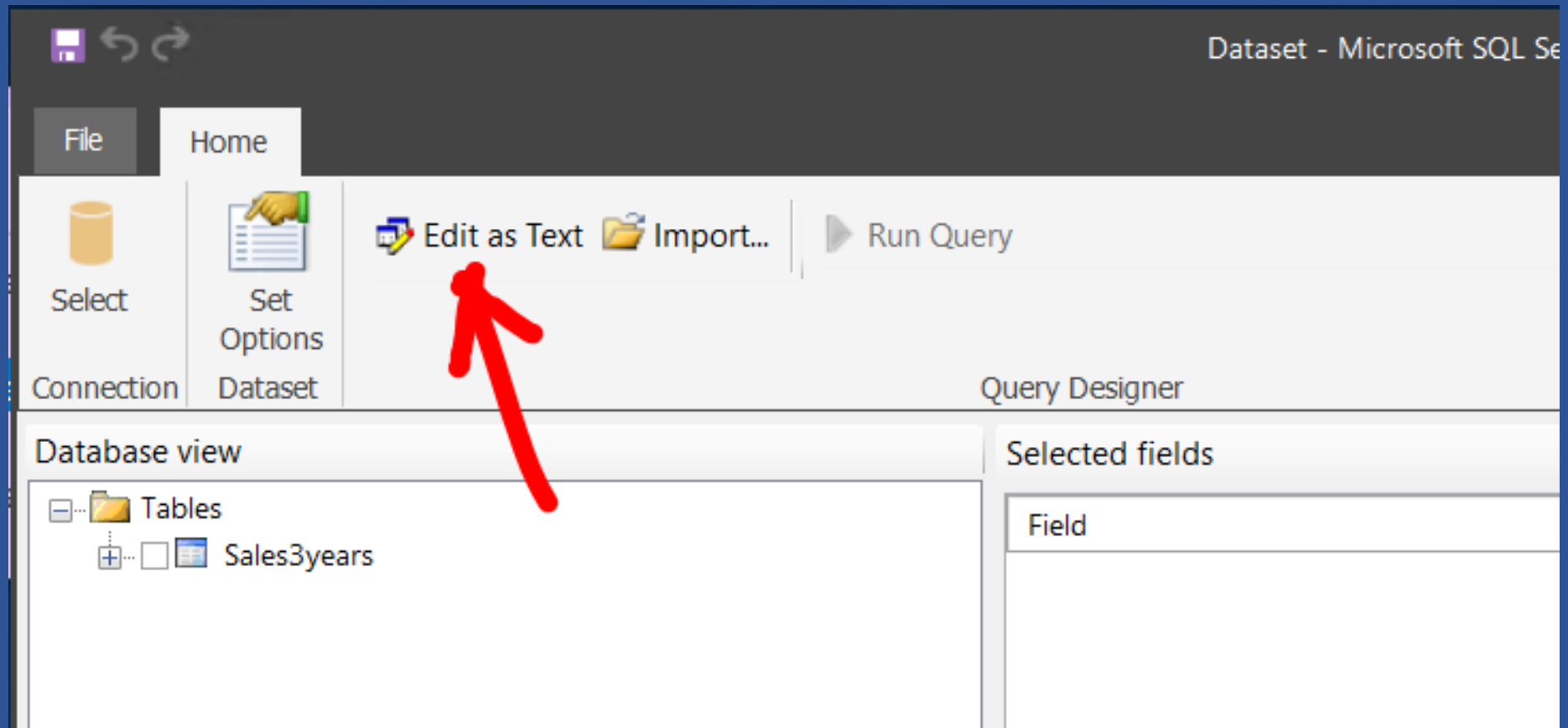
Password:

☐ Use as Windows credentials

☐ Save password with connection

Help OK Cancel

## Edit as Text



## Enter query and test

Dataset - Microsoft SQL Server

File Home

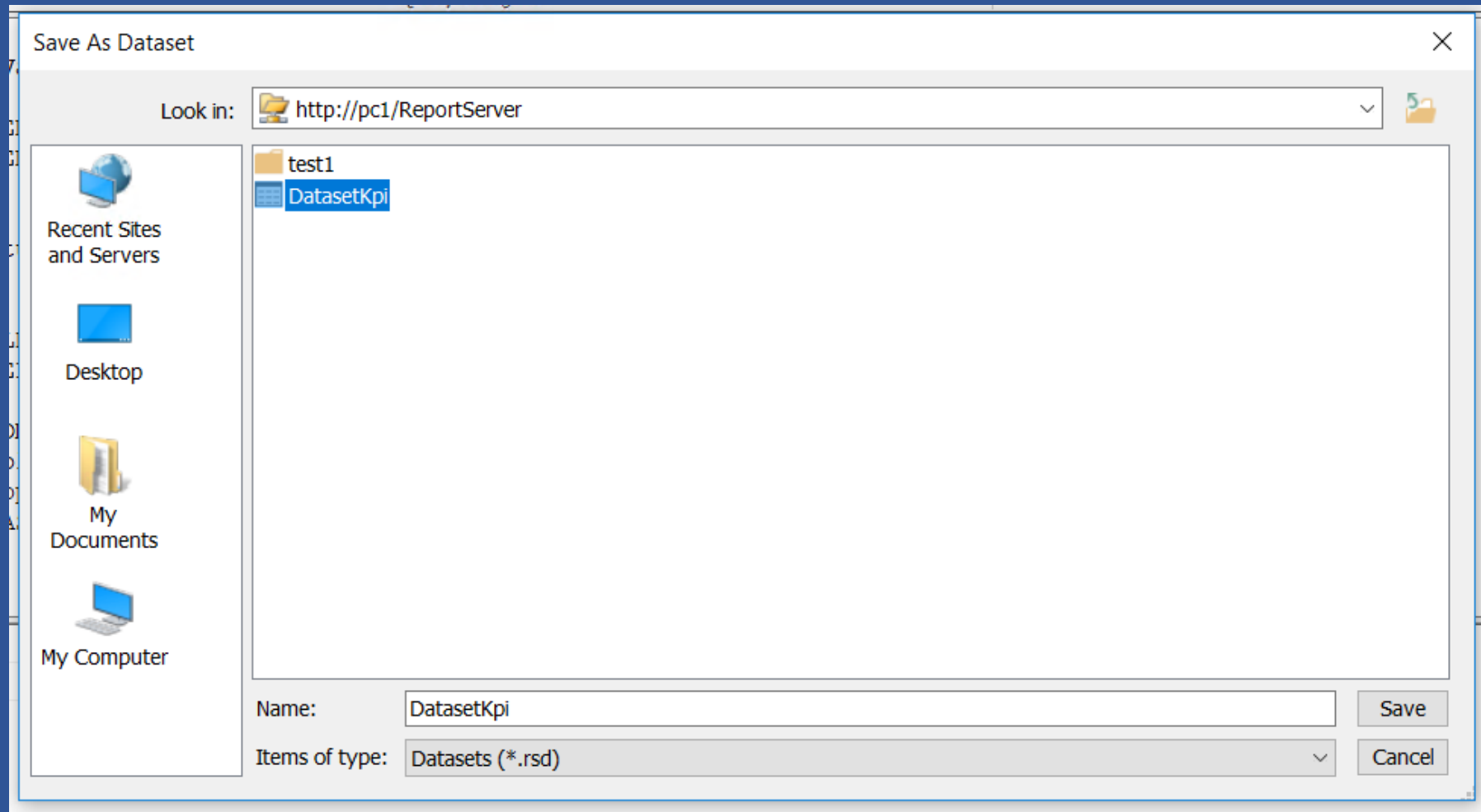
Select Set Options Import... Command type: Text

Connection Dataset Query Designer

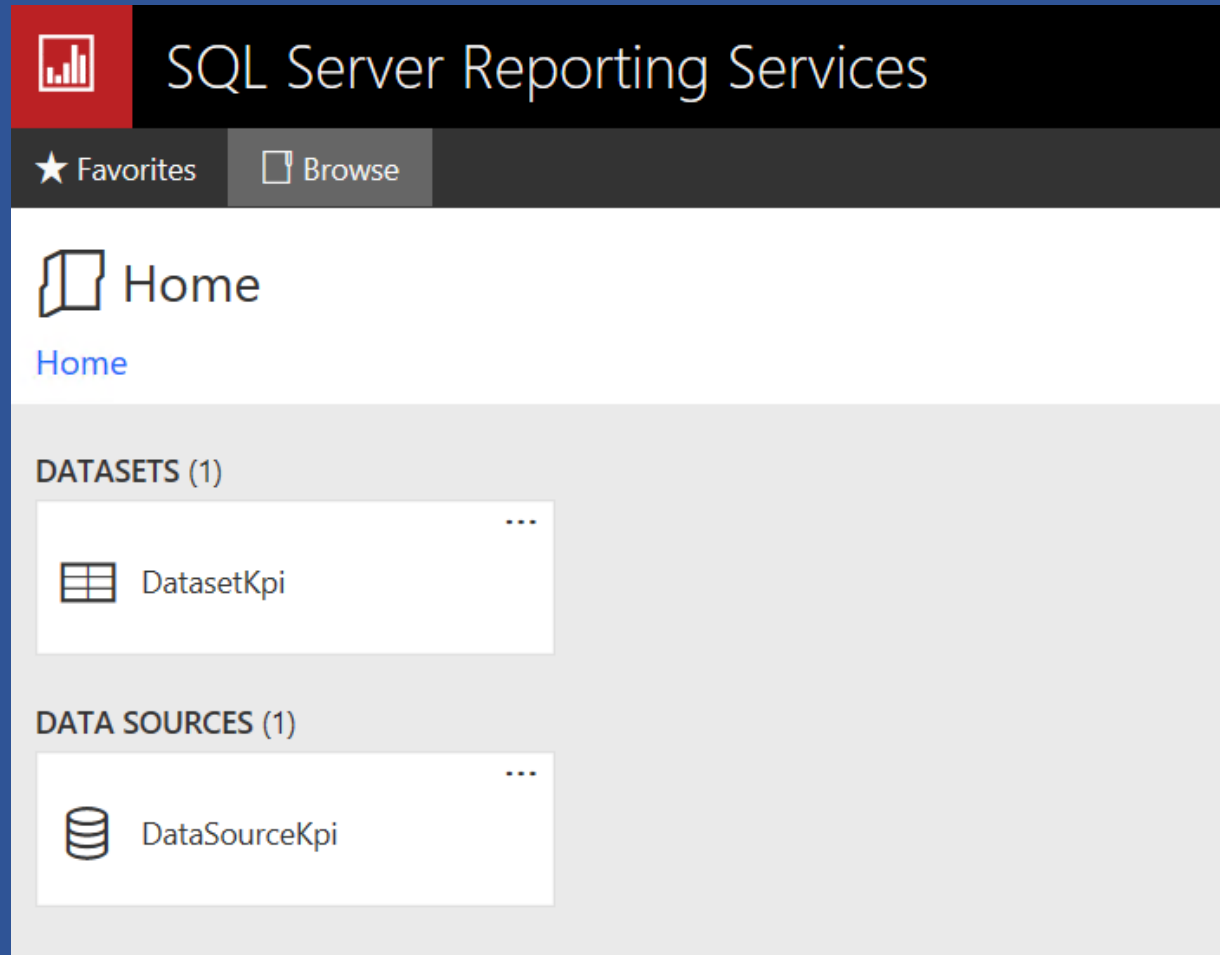
```
SELECT id, Product, Saleyear,
       Amount as Value, Goal,
       CASE
         WHEN Goal > Amount THEN -1
         WHEN Goal < Amount THEN 1
       ELSE
         0
       END AS Status
FROM
  (
    SELECT * ,
           (SELECT AVG(S1.Amount)*1.1
            FROM Sales3Years S1) as Goal
    FROM Sales3Years
  ) as tmp_tbl
WHERE Product = 'Apple' and SaleYear = 2020
order by SaleYear ASC
```

id	Product	Saleyear	Value	Goal	Status
11	Apple	2020	90	69.44666666666...	1

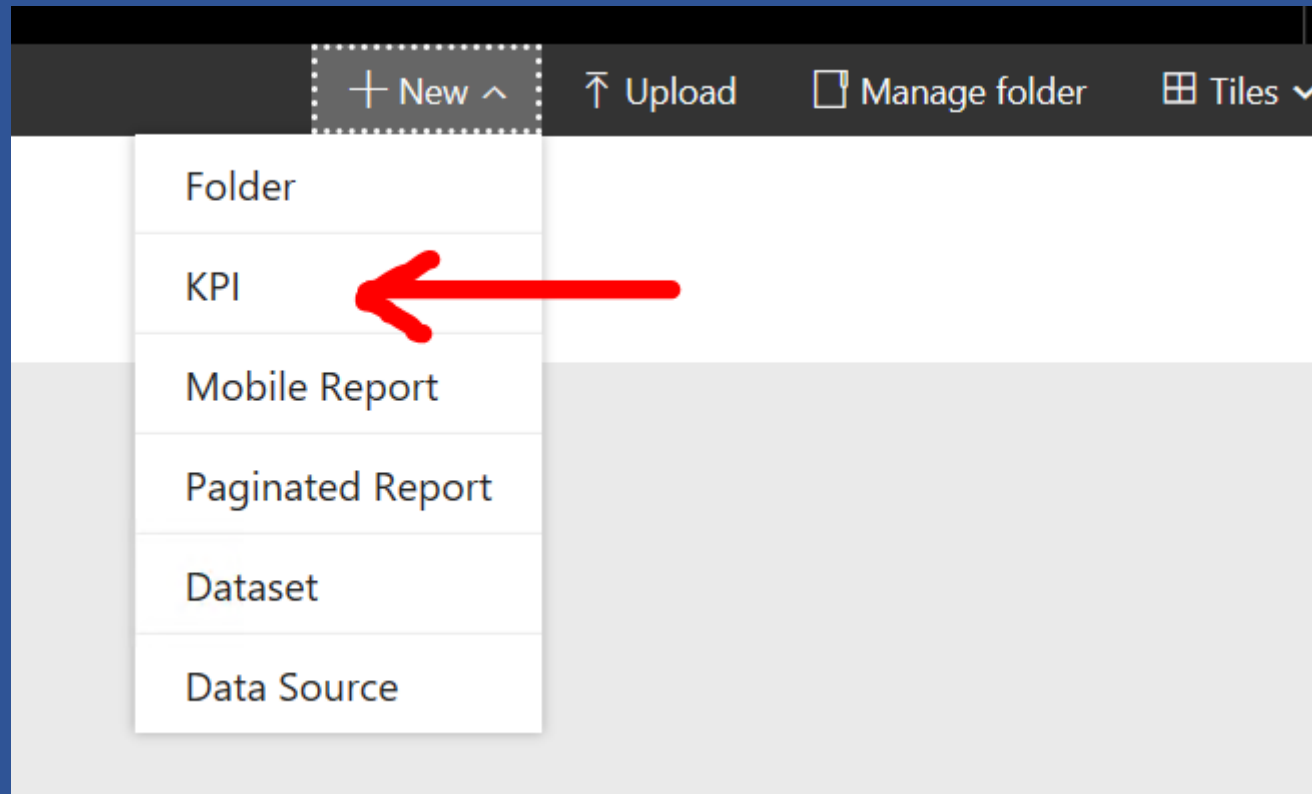
# Save name = DatasetKpi



## Verify that you have DatasetKpi and DataSourceKpi



## New KPI




# Set Value, Goal and Status

Preview

YTD 2020 Apple KPI

90 (+30%)



KPI name

YTD 2020 Apple KPI

Description

☐ Hide this item

Value format

General

Value

Pick dataset field

Dataset field

DatasetKpi.Value

✓

...

Goal

Pick dataset field

Dataset field

DatasetKpi.Goal

✓

...

Status

Pick dataset field

Dataset field

DatasetKpi.Status

✓

...


Trend set


Enter trend set


Set manually


1; 8; 3; 9; 1; 2; 3; 4


Visualization











Related content



# Final Result

