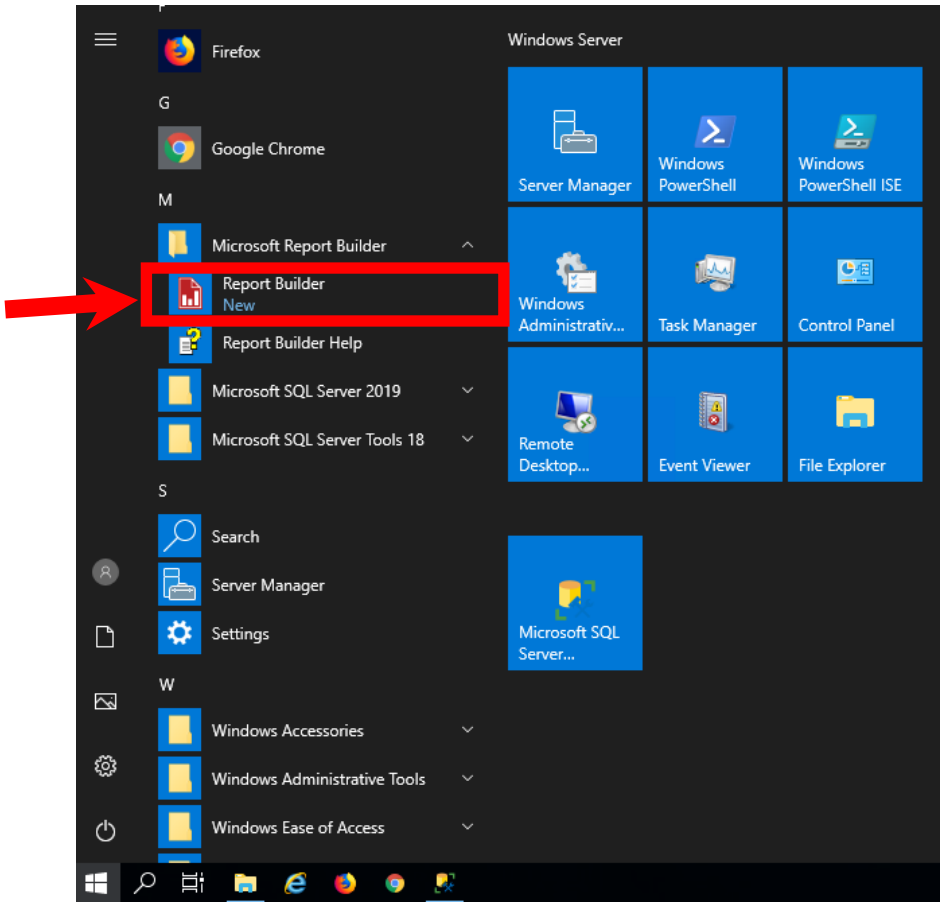
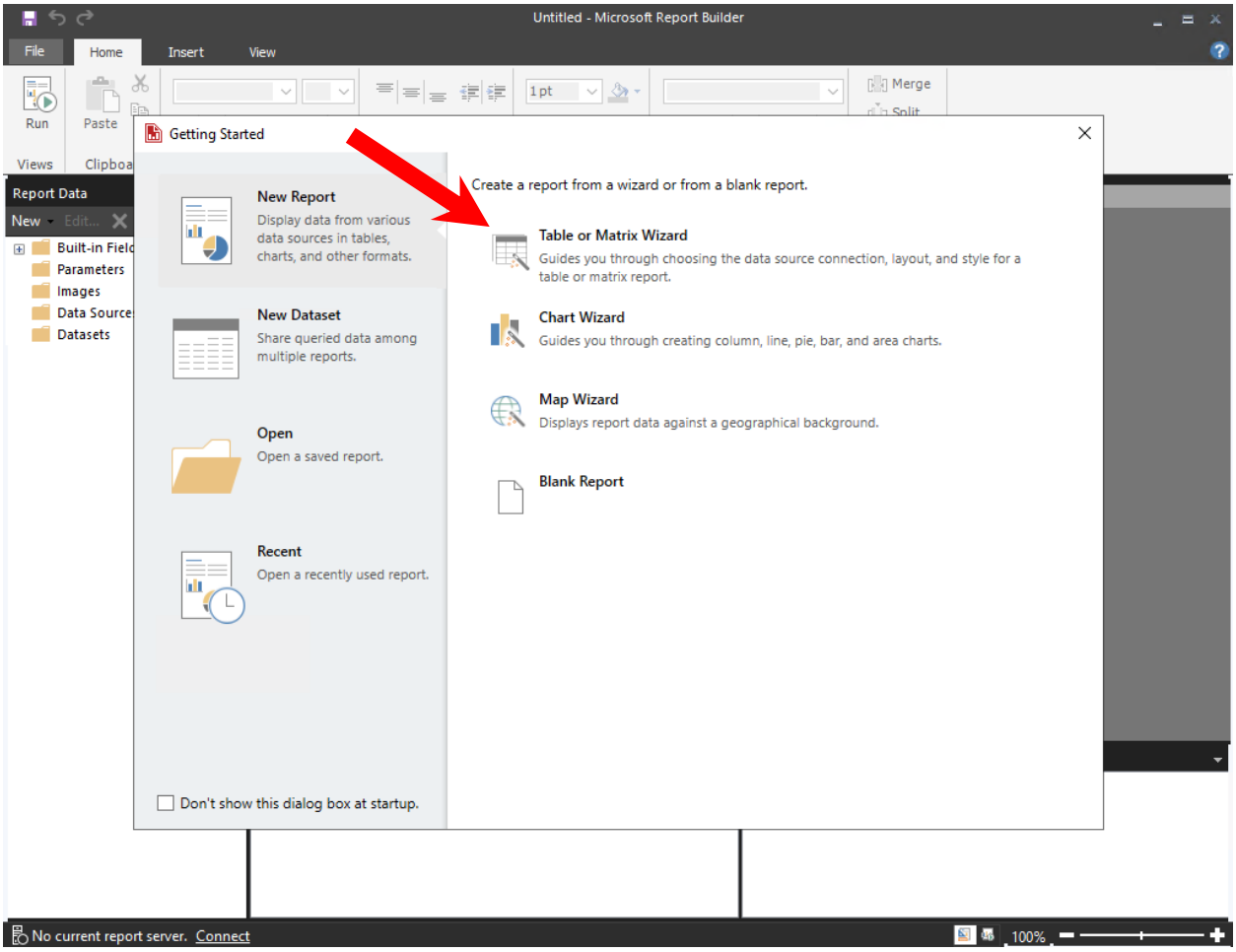
CREATING A BIKESTORES TABULAR REPORT

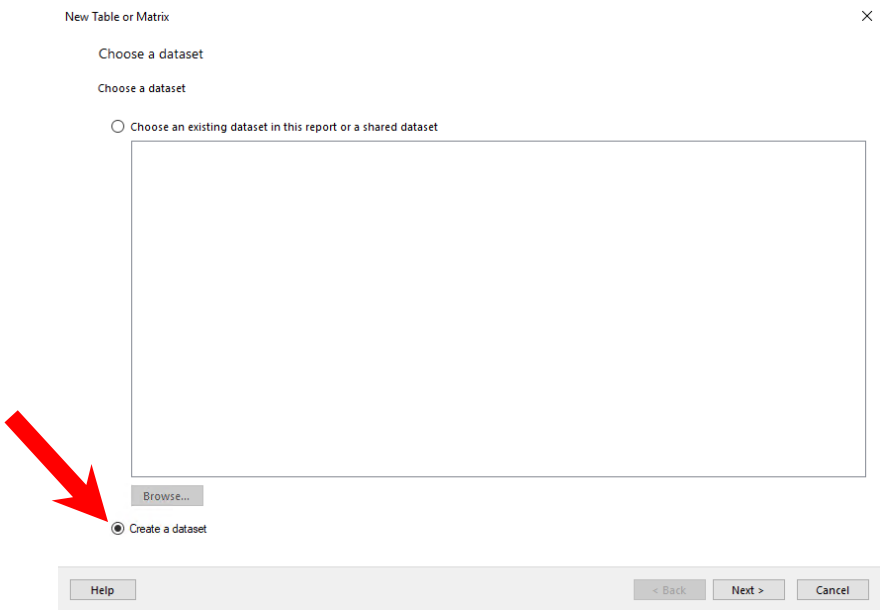
[1] To start the Microsoft Report Builder application, access the Windows Start menu and select the Microsoft Report Builder folder.



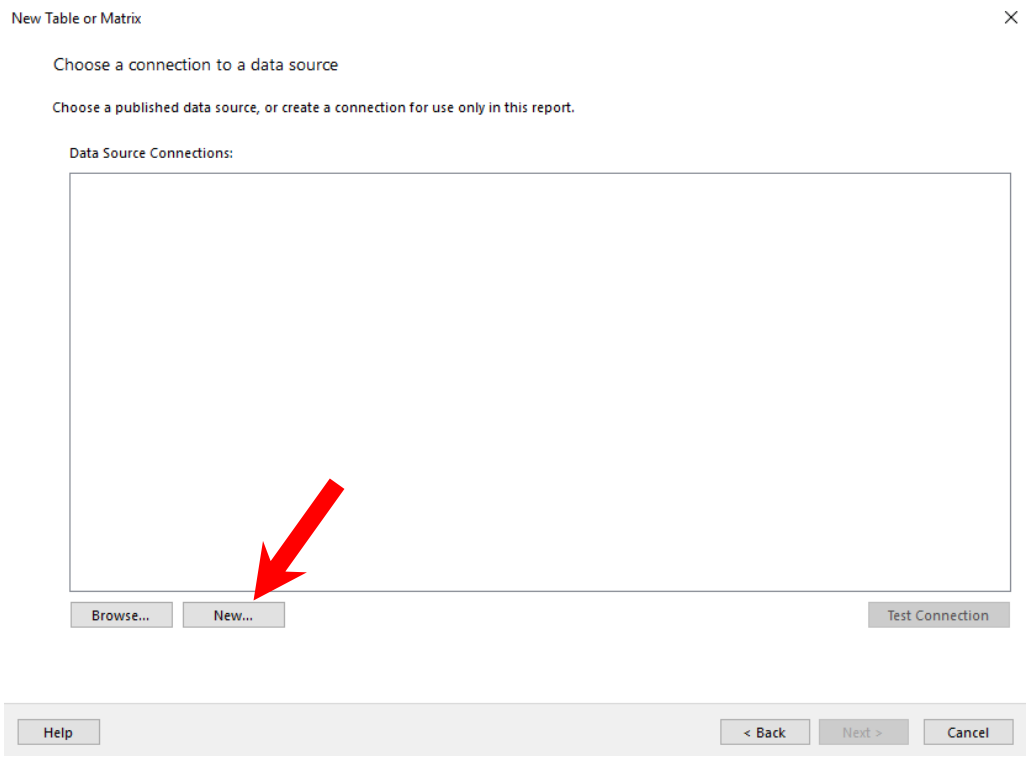
[2] You'll then see the ***Getting Started*** screen in Microsoft Report Builder. Click on the ***Table or Matrix Wizard*** option.



[3] You'll be presented with the ***New Table or Matrix*** screen. Click on the "***Create a dataset***" option and click the **NEXT** button to continue.



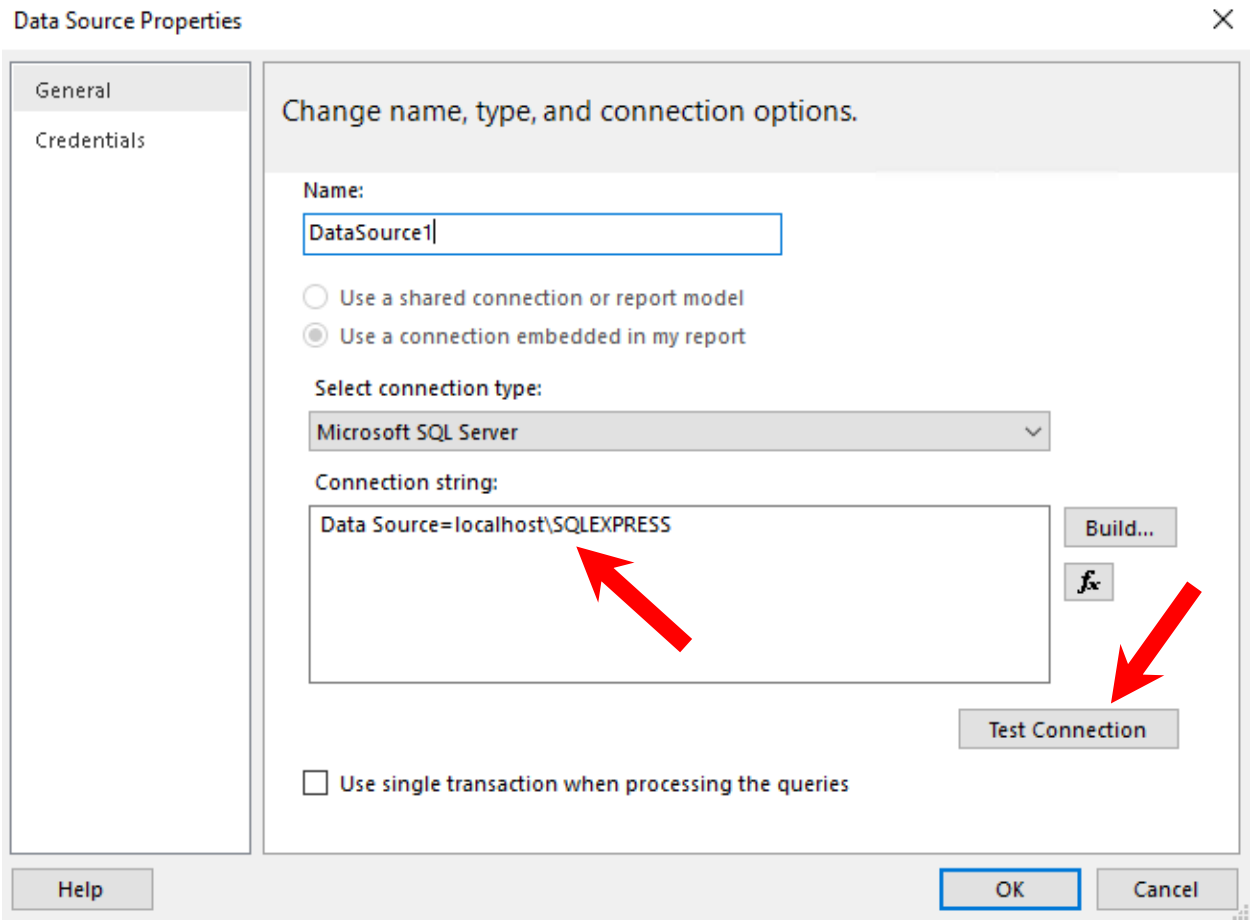
[4] You will then see a screen asking for you the "***Choose a connection to a data source***." Click on the **NEW** button.

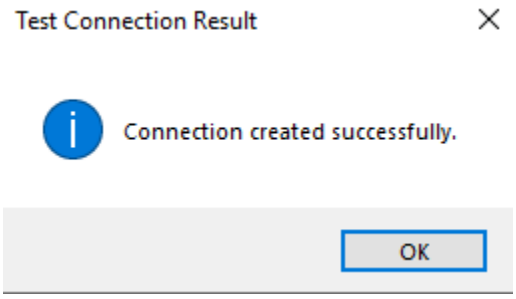


[5] You will then see the ***Data Source Properties*** screen. You can leave the ***Name*** value as is or provide a preferred name. In the ***Connection String*** field, enter the following value:

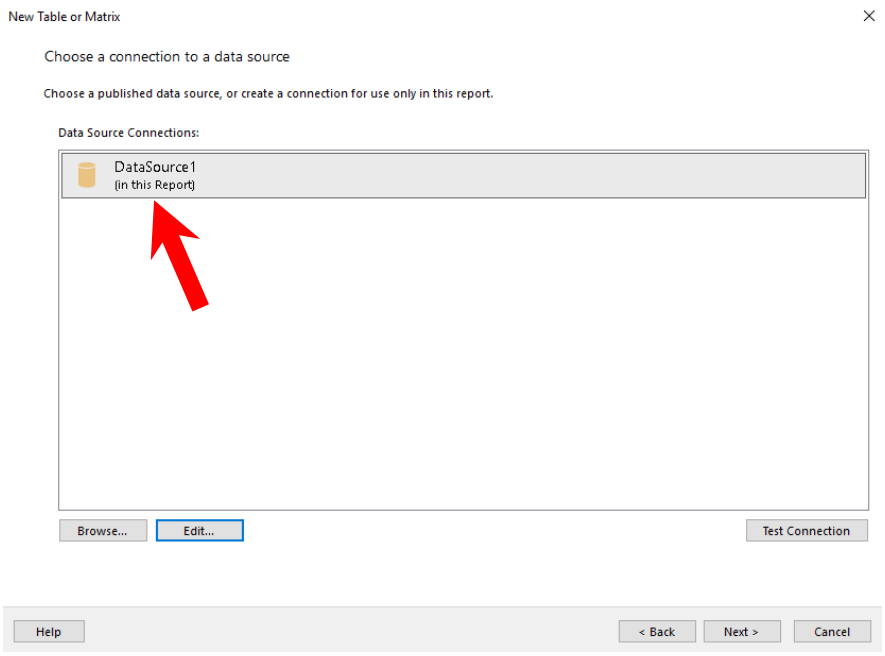
Data Source=localhost\SQLEXPRESS

Click on the **TEST CONNECTION** to verify the connection string. You should receive a "***Connection created successfully***" message. Click on the **OK** button close out the prompt. Then click on the **OK** button on the ***Data Source Properties*** screen to complete the data source specification.

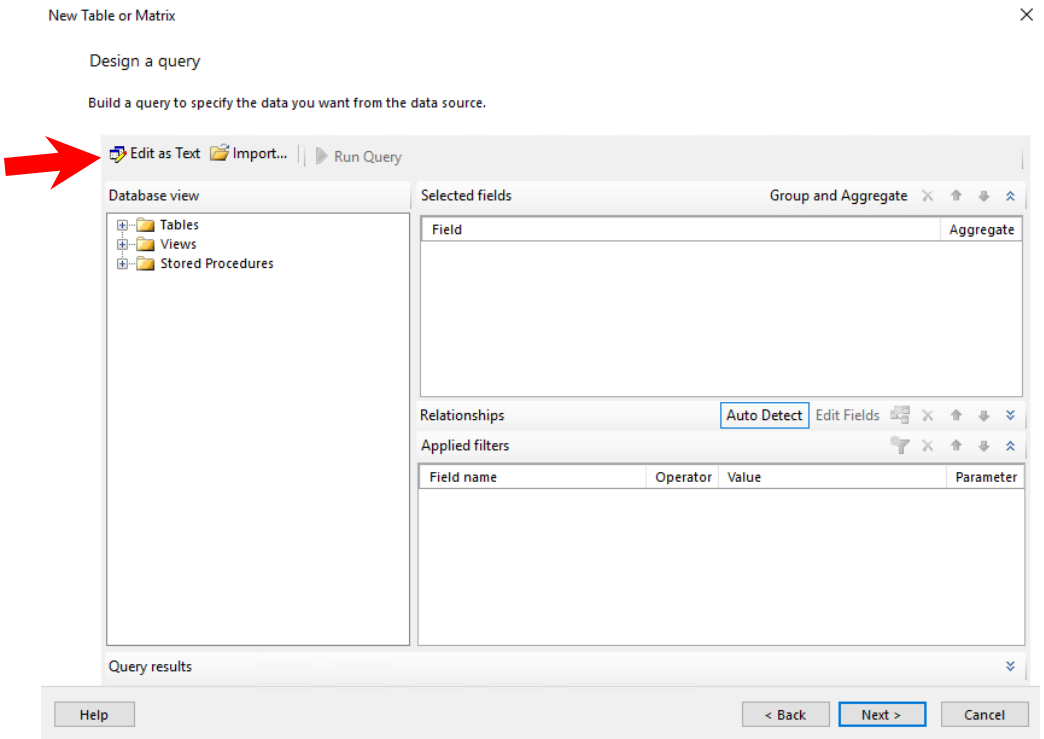




[6] You'll be returned to the "***Choose a connection to a data source screen***." Make sure the new data source entry is highlighted and then click on the **NEXT** button to continue.

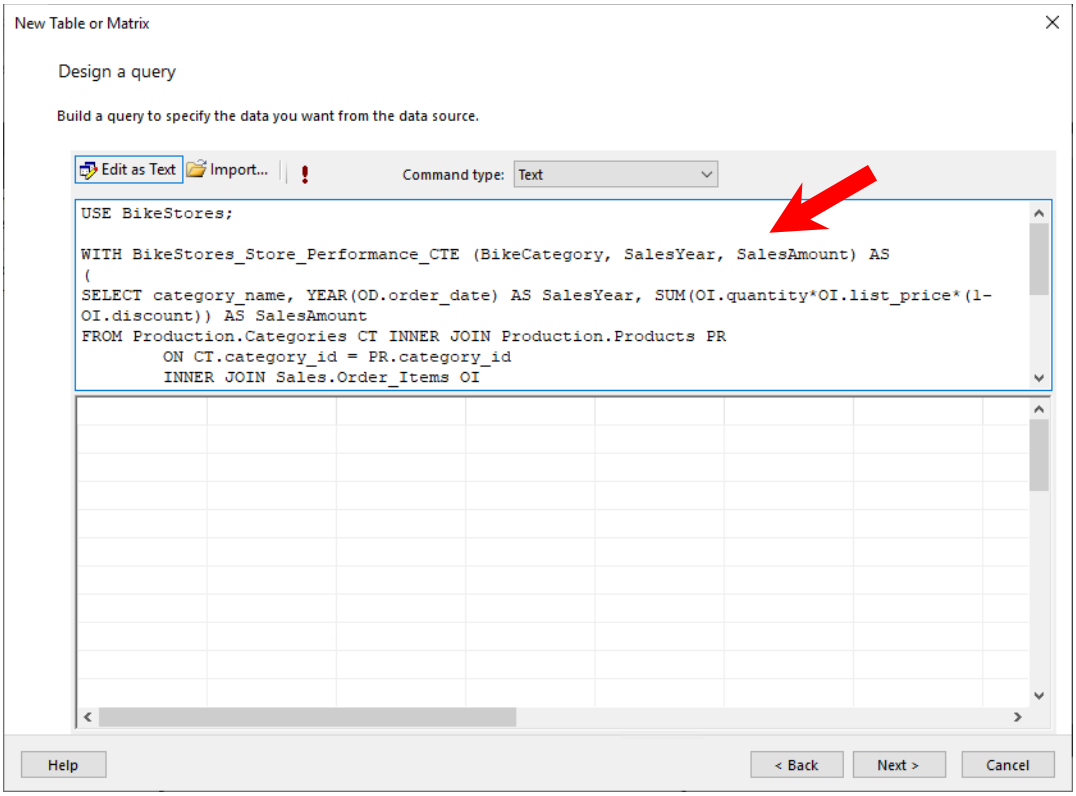


[7] You'll then see the "***Design a query***" screen. Click on the "***Edit as Text***" option in the top left portion of the screen.

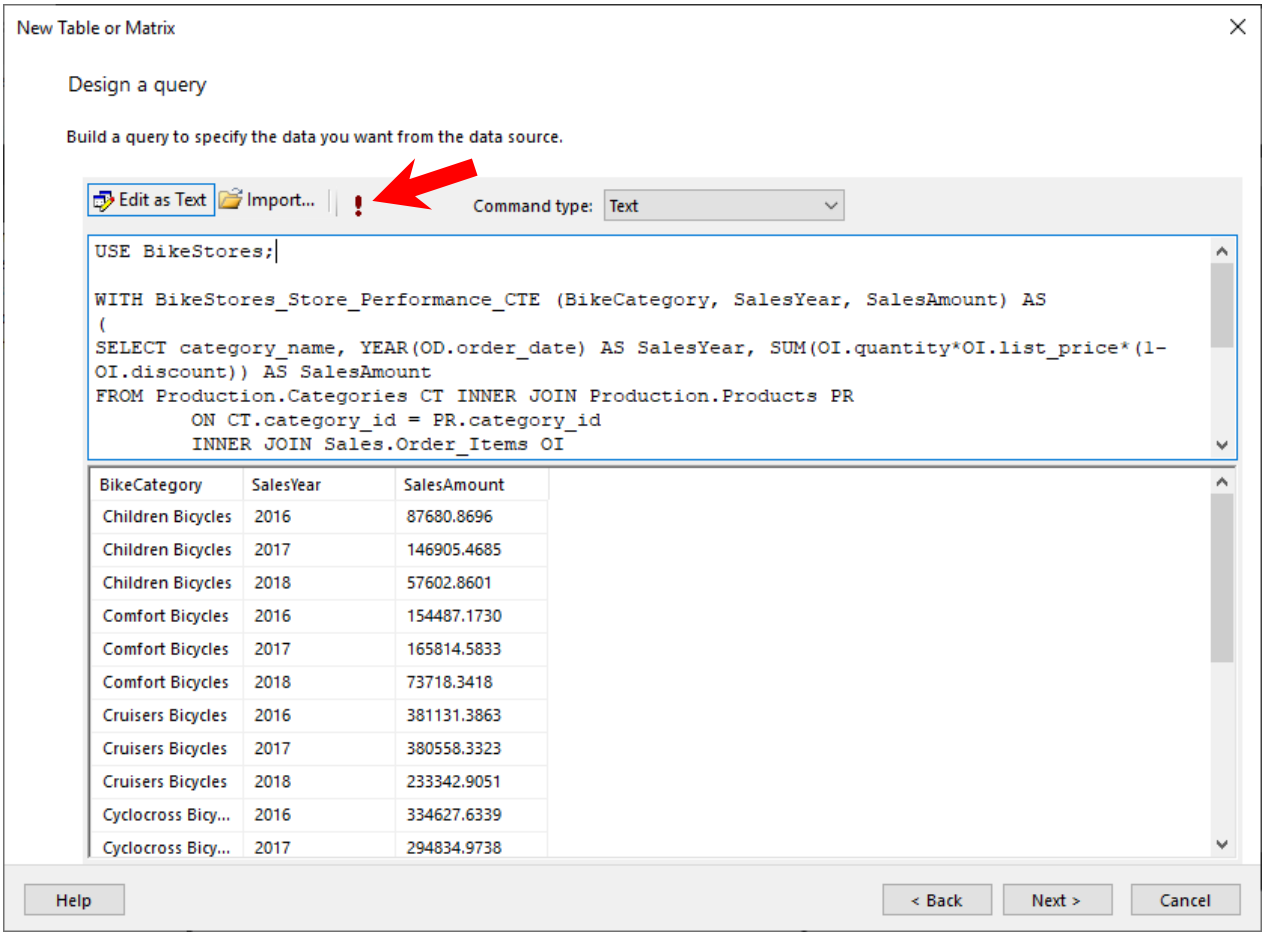


[8] In the provided text field area, enter the following SQL statements:

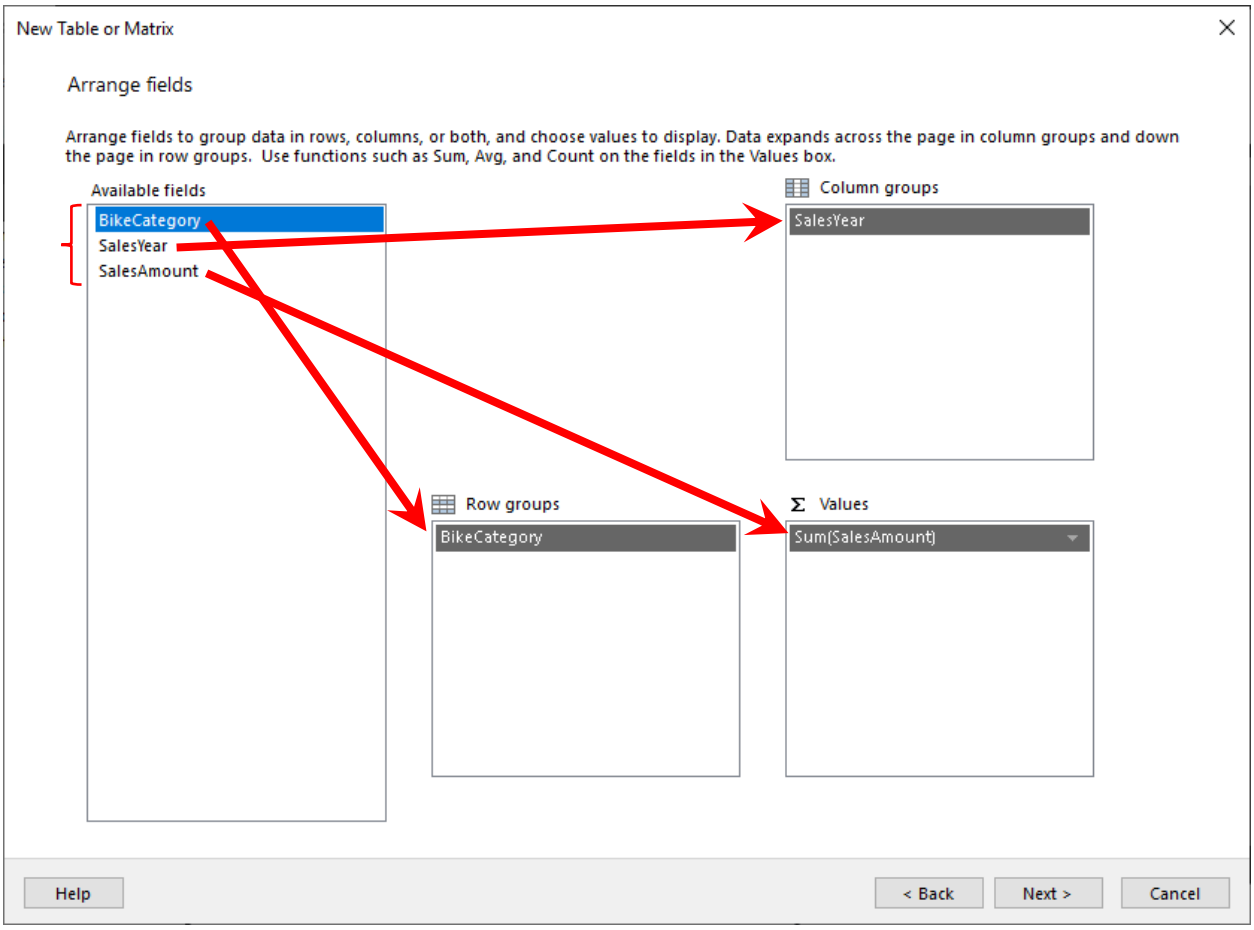
```
USE BikeStores;

WITH BikeStores_Store_Performance_CTE (BikeCategory, SalesYear,
SalesAmount) AS
(
SELECT category_name, YEAR(OD.order_date) AS SalesYear,
SUM(OI.quantity*OI.list_price*(1-OI.discount)) AS SalesAmount
FROM Production.Categories CT INNER JOIN Production.Products PR
      ON CT.category_id = PR.category_id
      INNER JOIN Sales.Order_Items OI
      ON PR.product_id = OI.product_id
      INNER JOIN Sales.Orders OD
      ON OD.order_id = OI.order_id
GROUP BY category_name, YEAR(OD.order_date)
)

SELECT BikeCategory, SalesYear, SalesAmount
FROM BikeStores_Store_Performance_CTE
ORDER BY BikeCategory, SalesYear;
```



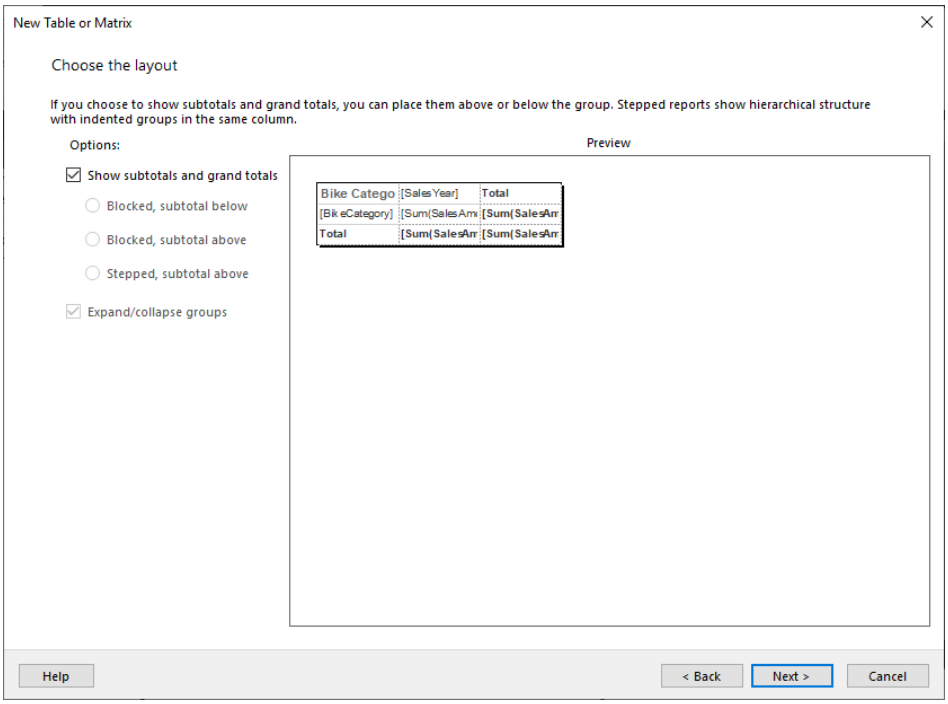
[9] Click on the exclamation point ( ) to execute and test the entered SQL code. A total of 20 records should be returned from the SQL statements. Then click on the **NEXT** button to continue.



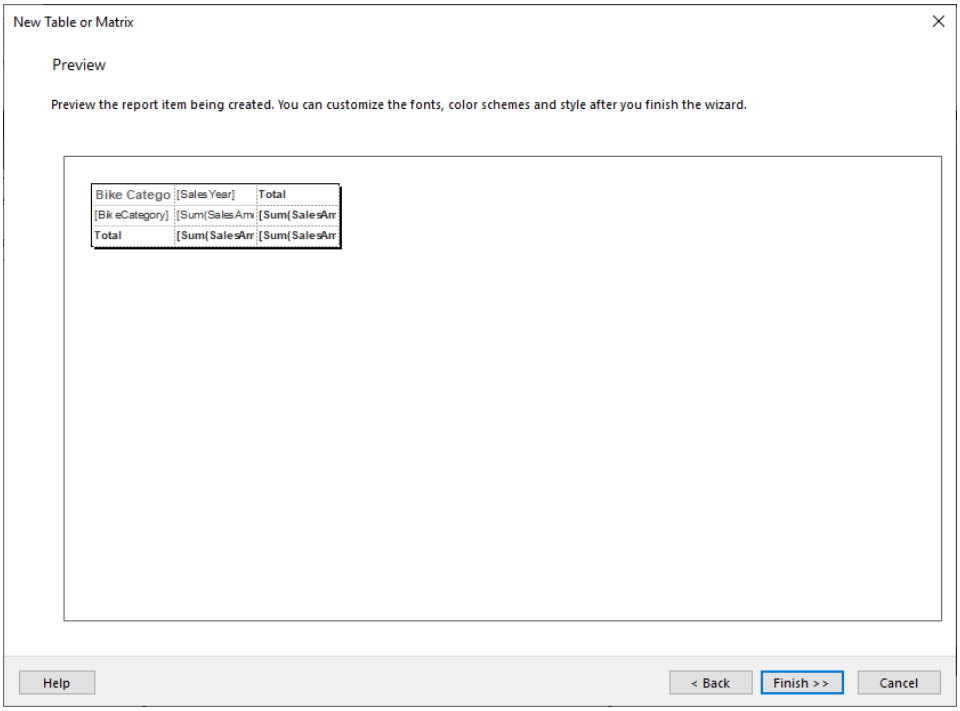
[10] You will then be presented with the "***Arrange fields***" screen. Left-click on the ***BikeCategory*** item with your mouse and drag it to the ***Row Groups*** area. Left-click on the ***SalesYear*** item with your mouse and drag it to the ***Column Groups*** area. Left-click on the ***SalesAmount*** item with your mouse and drag it to the ***Values*** area. The item placement should look like what is presented below. Click on the **NEXT** button to continue.



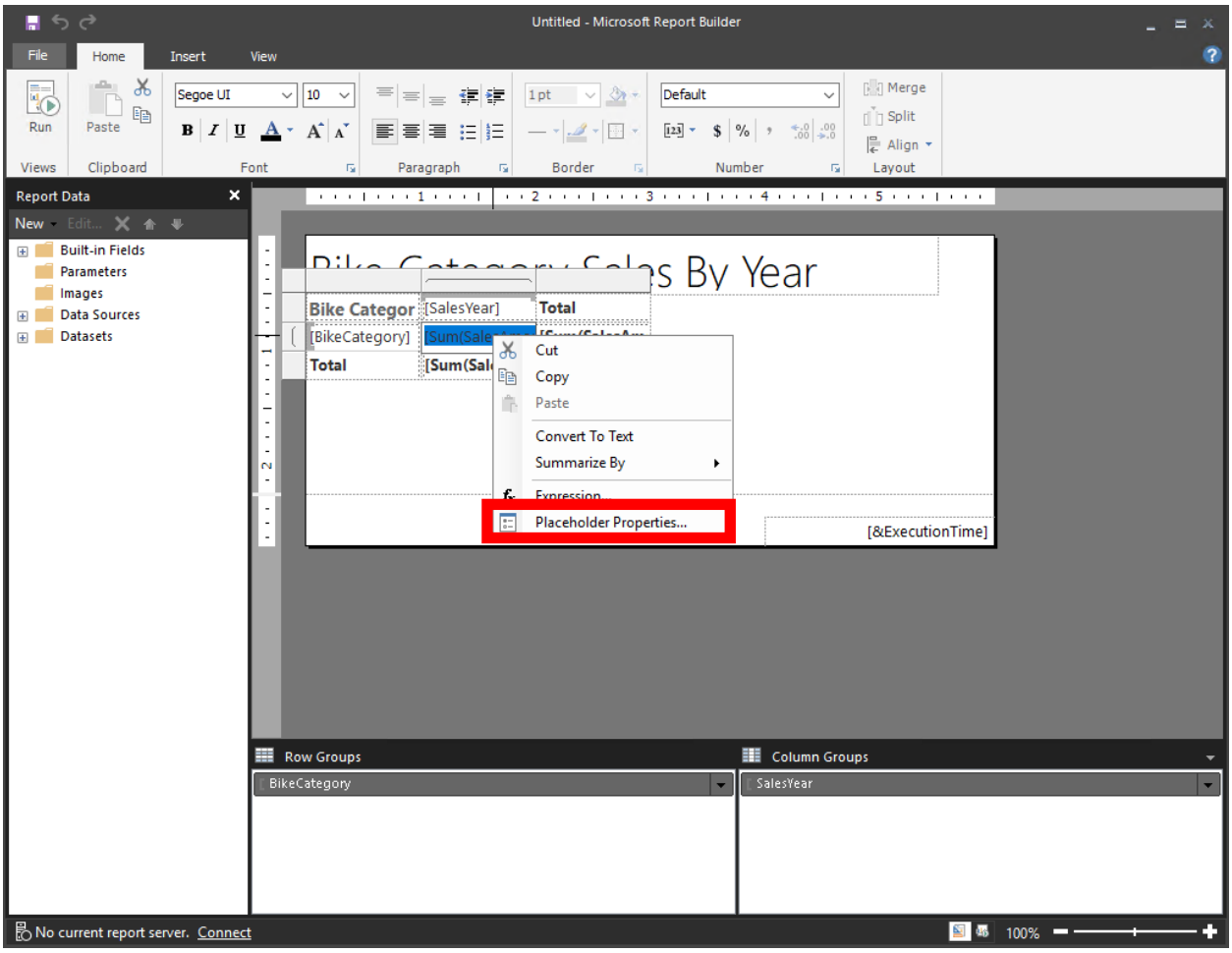
[11] You'll then see the "***Choose the layout***" screen. Enter a checkmark for the "***Show subtotals and grand totals***" option. Click on the **NEXT** button to continue.



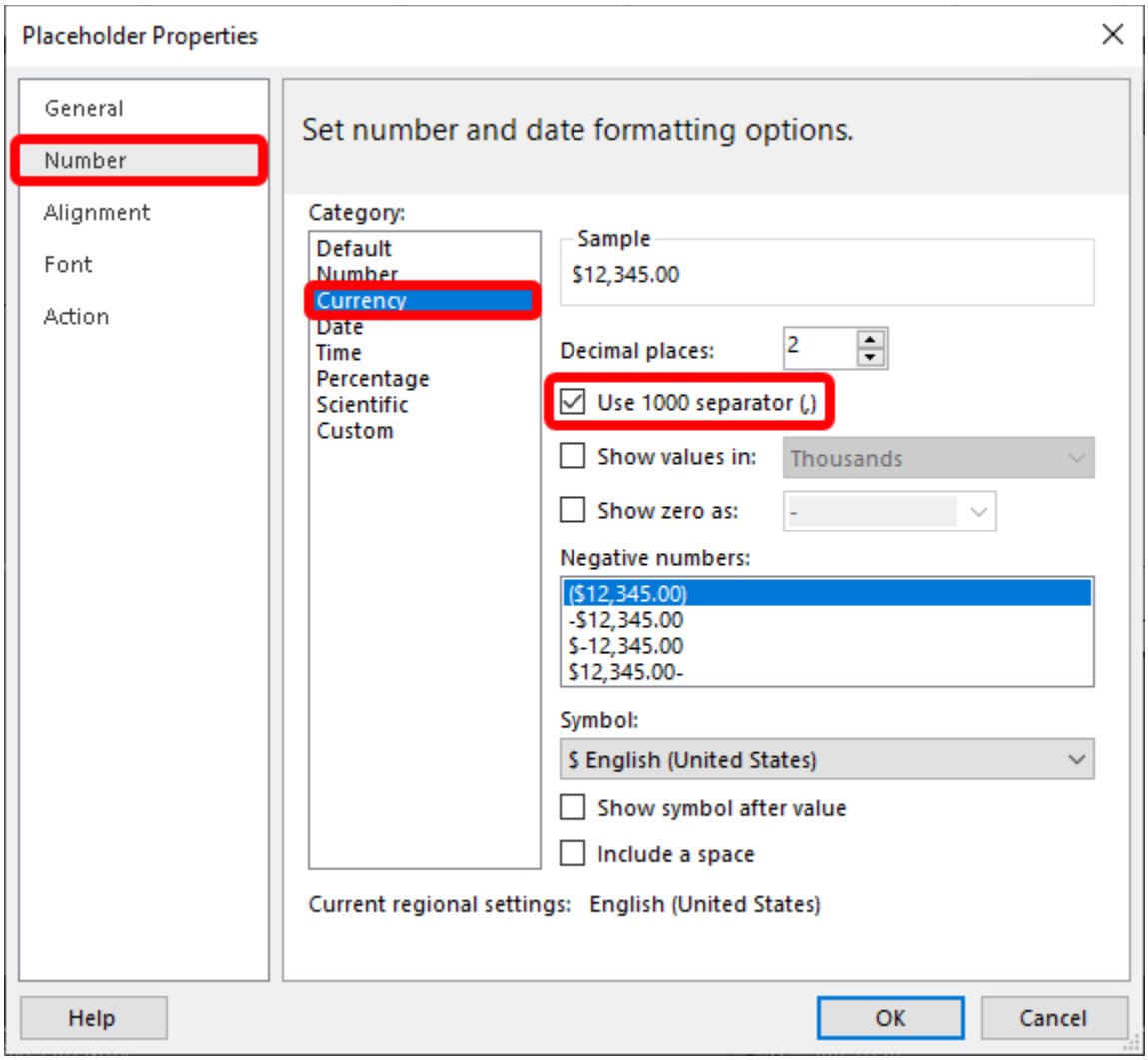
[12] You'll then see the "***Preview***" screen. Click on the **FINISH** button.



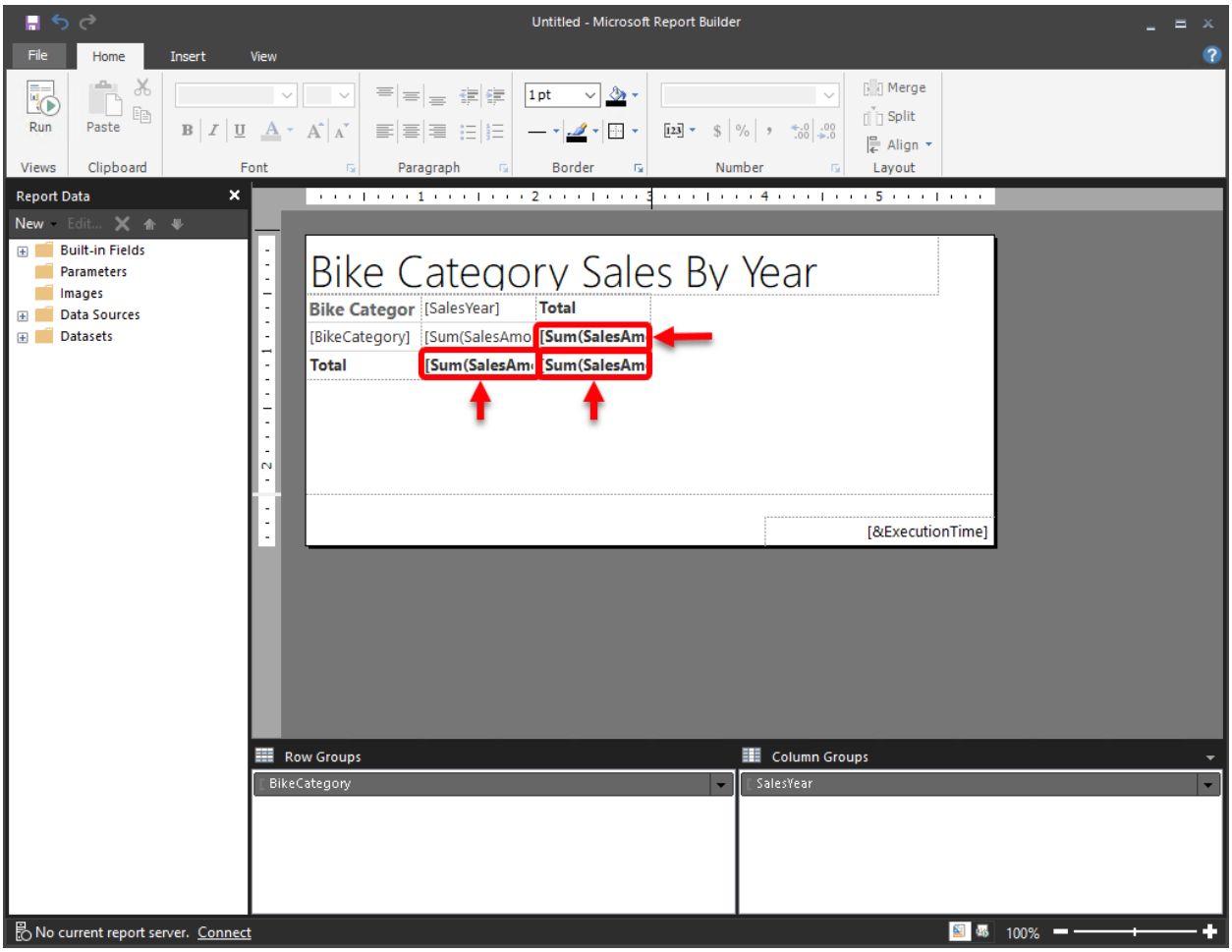
[13] The configured report screen will then be presented in the main Report Building window. You can add a title as specified on the screen. Right-click on the cell containing **Sum(SalesAmount)** and select the ***Placeholder Properties*** item from the right-click menu.



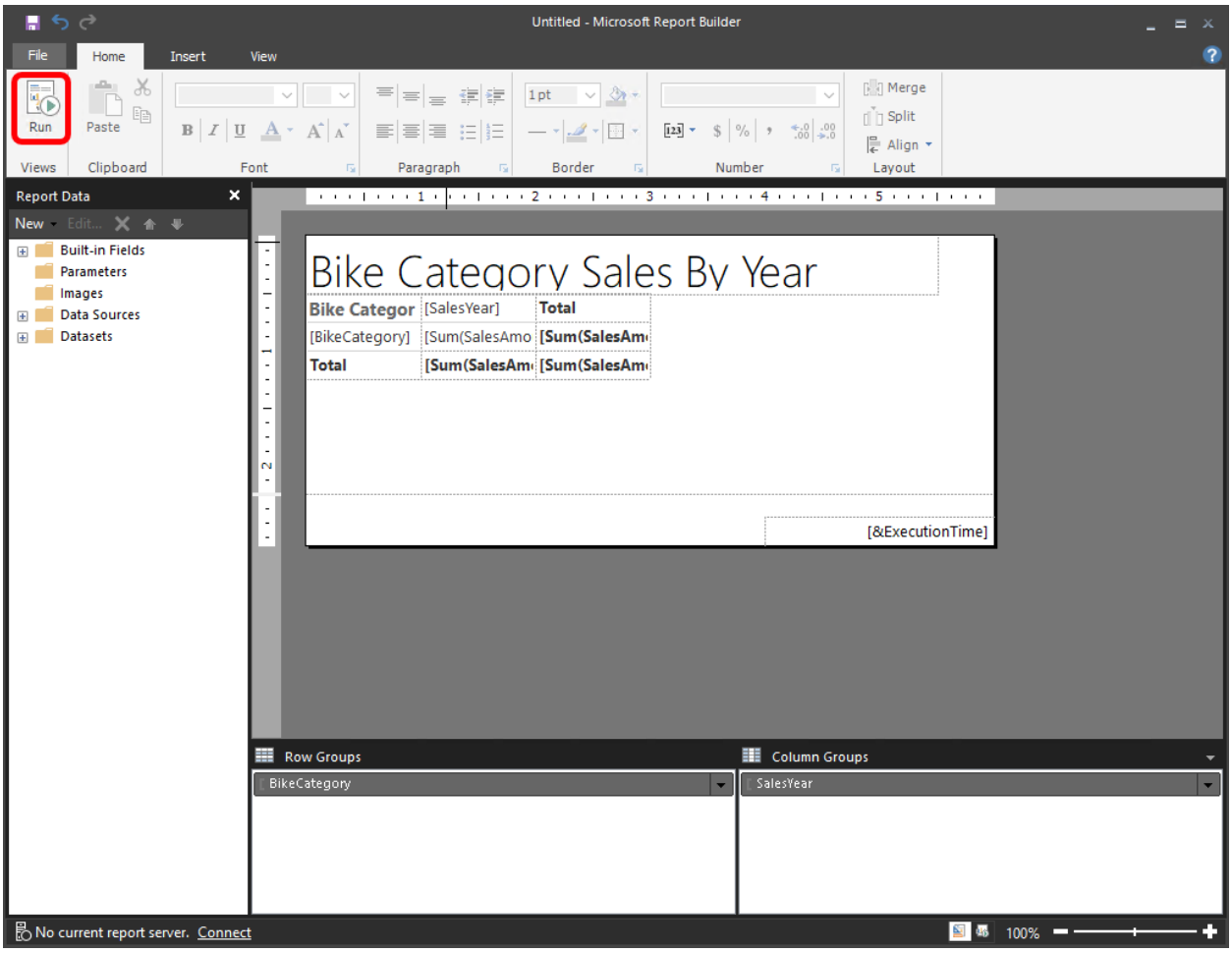
[14] In ***Placeholders Properties*** window, access the ***Number*** area and select the ***Currency*** option in the ***Category*** section. Enter a checkmark for the ***Use 1000 Separator (,)*** item. Click on the **OK** button to apply the change.



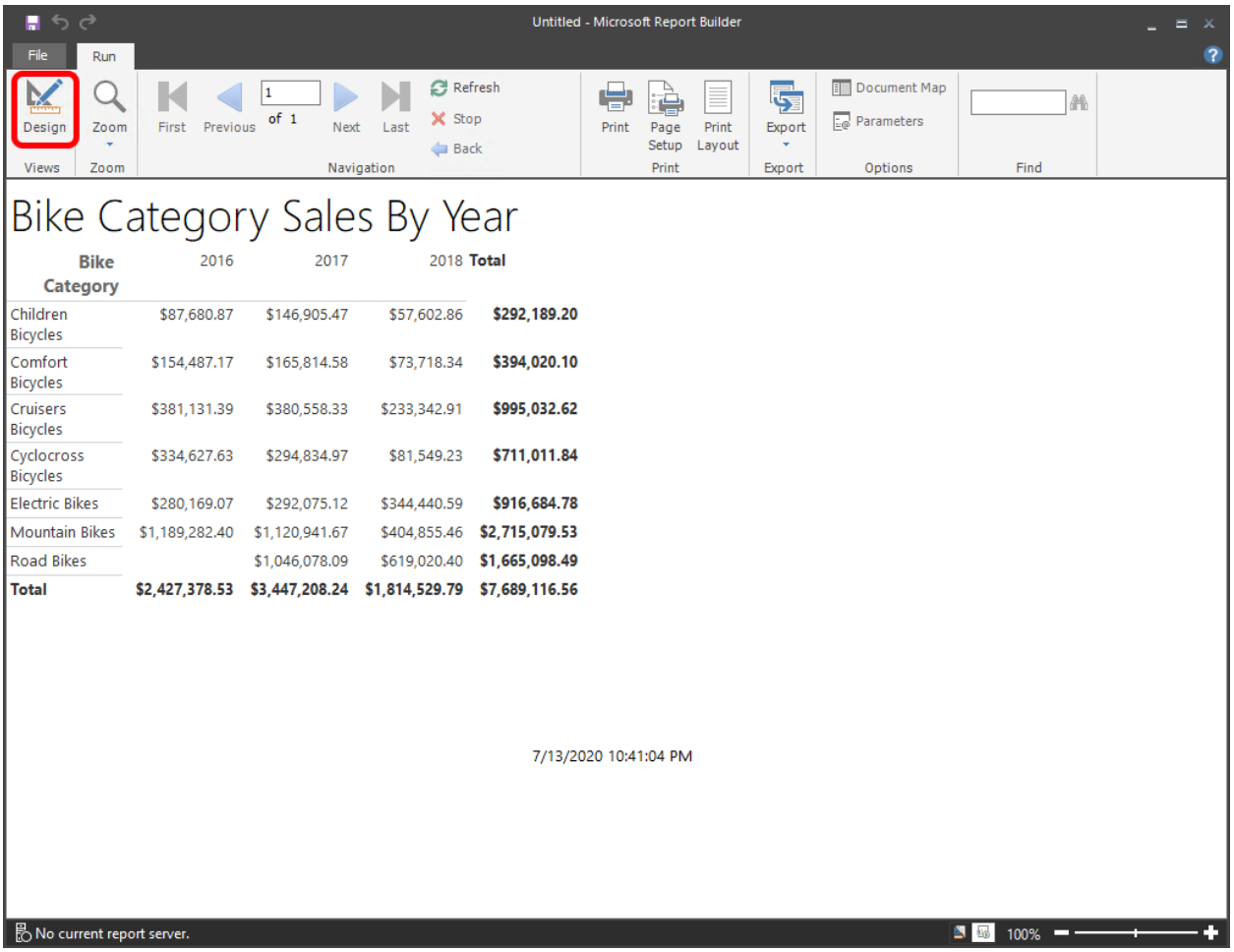
[15] Repeat Steps 13 and 14 for the other report cells that start with the term **Sum**.



[16] Click on the **RUN** button in the upper left corner of the window to test out the report.



[17] The generated report should similar to what is provided below. Take a screenshot of your generated report as proof of report completion for the assignment. Incorporate the screenshot into your assignment document. Then click on the **DESIGN** button in the upper left corner of the window to return to the main Report Builder screen.



[18] Save the Report Builder file via **FILE-->SAVE AS** from the top menu. Provide an applicable file name for the Report Builder file. You can then exit from the Report Builder application.