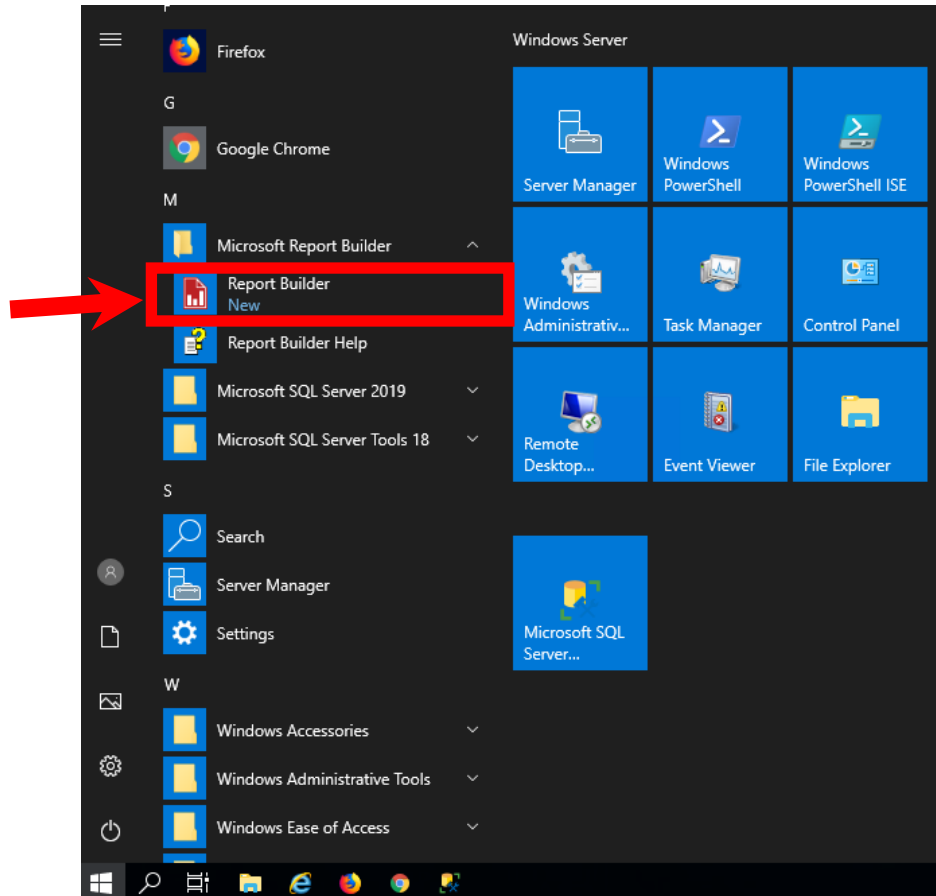
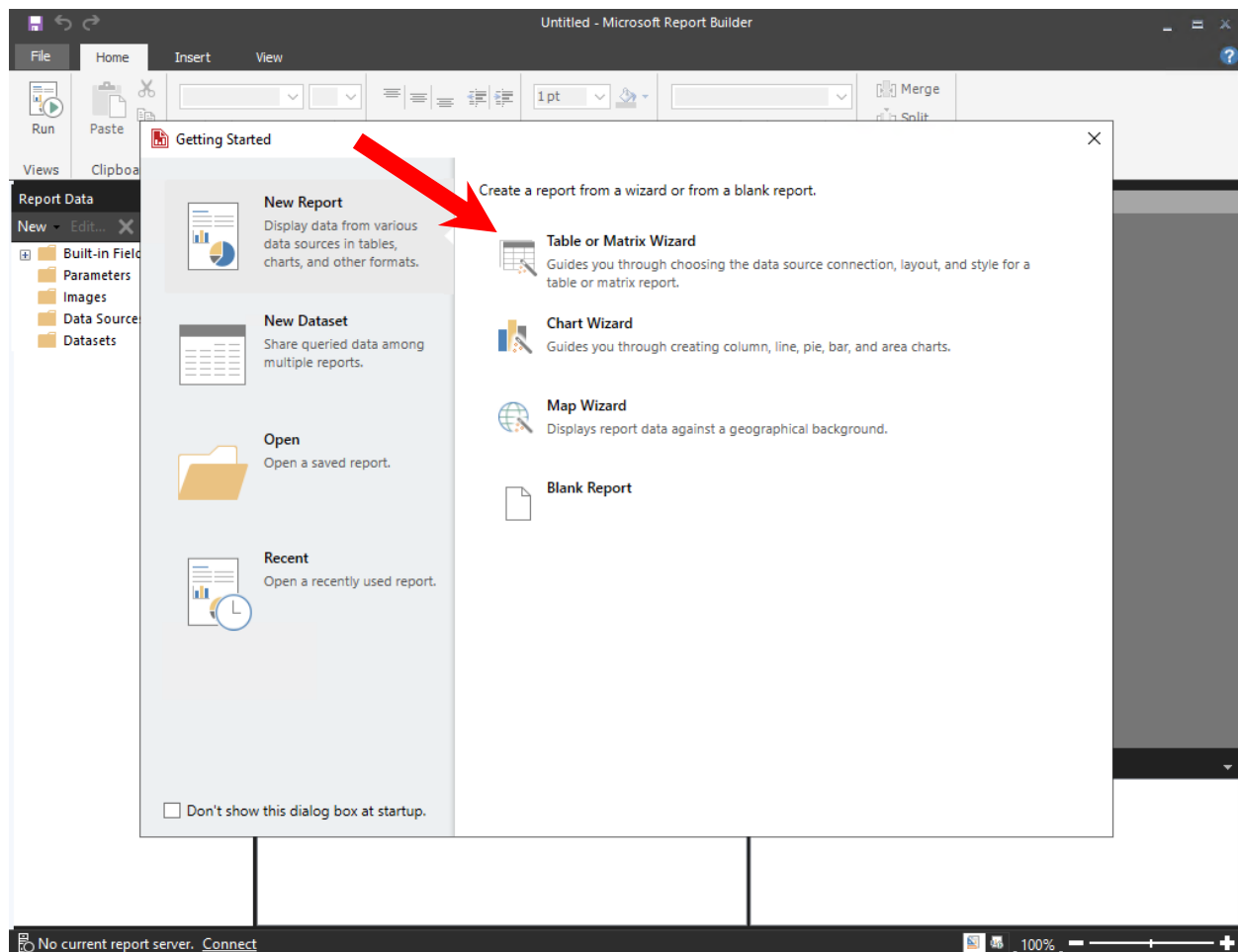


CREATING A BIKESTORES TABULAR REPORT

- [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.

New Table or Matrix

Choose a dataset

Choose a dataset

☐ Choose an existing dataset in this report or a shared dataset

☒ Create a dataset

Browse...

Help < Back Next > Cancel

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

New Table or Matrix

Choose a connection to a data source

Choose a published data source, or create a connection for use only in this report.

Data Source Connections:

Browse... New... Test Connection

Help < Back Next > Cancel

- [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.

Data Source Properties

General

Credentials

Change name, type, and connection options.

Name:
DataSource1

☐ Use a shared connection or report model
☒ Use a connection embedded in my report

Select connection type:
Microsoft SQL Server

Connection string:
Data Source=localhost\SQLEXPRESS

Build...

fx

Test Connection

☐ Use single transaction when processing the queries

Help OK Cancel

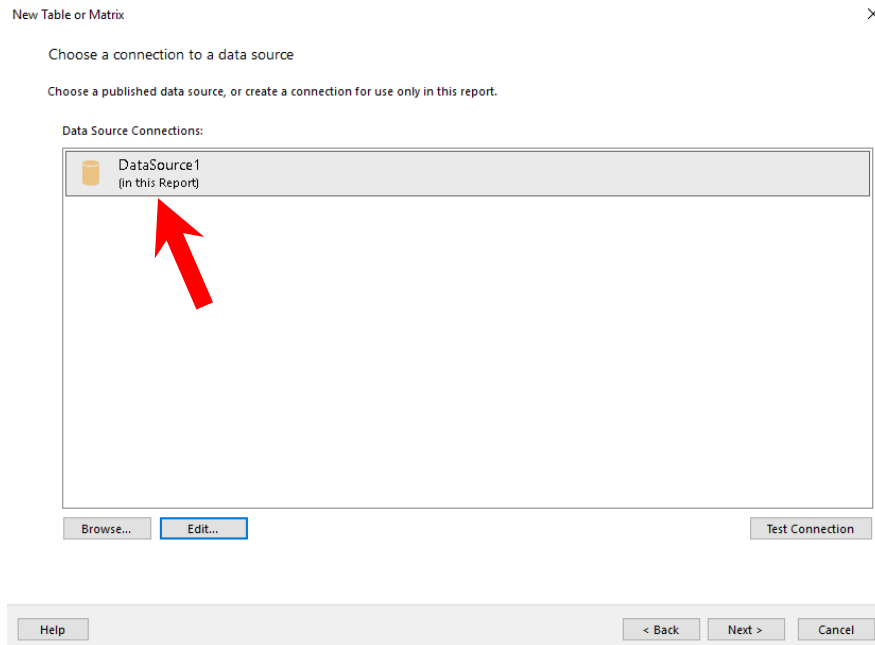
Test Connection Result



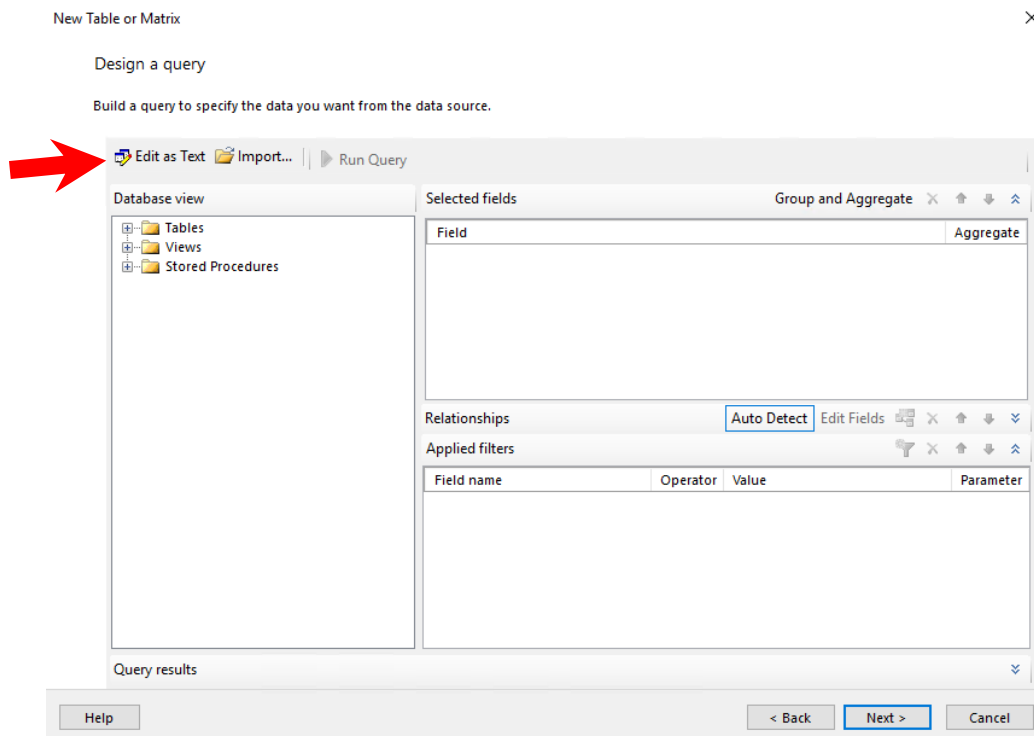
Connection created successfully.

OK

- [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.

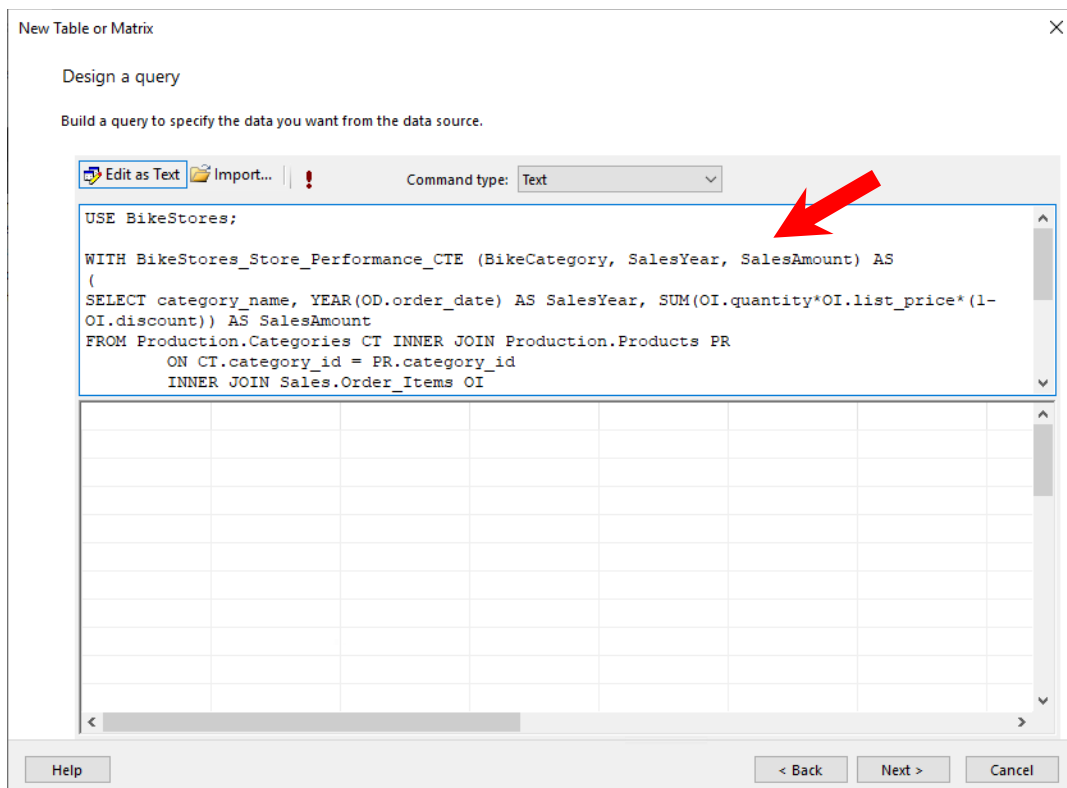



[8] In the provided text field area, enter the following SQL statements:

```
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.

New Table or Matrix

Design a query

Build a query to specify the data you want from the data source.

 Edit as Text  Import...  Command type: Text

```
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
```

BikeCategory	SalesYear	SalesAmount
Children Bicycles	2016	87680.8696
Children Bicycles	2017	146905.4685
Children Bicycles	2018	57602.8601
Comfort Bicycles	2016	154487.1730
Comfort Bicycles	2017	165814.5833
Comfort Bicycles	2018	73718.3418
Cruisers Bicycles	2016	381131.3863
Cruisers Bicycles	2017	380558.3323
Cruisers Bicycles	2018	233342.9051
Cyclocross Bicy...	2016	334627.6339
Cyclocross Bicy...	2017	294834.9738

Help < Back Next > Cancel

- [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.

New Table or Matrix

Arrange fields

Arrange fields to group data in rows, columns, or both, and choose values to display. Data expands across the page in column groups and down the page in row groups. Use functions such as Sum, Avg, and Count on the fields in the Values box.

Available fields

- BikeCategory
- SalesYear
- SalesAmount

Column groups

- SalesYear

Row groups

- BikeCategory

Σ Values

- Sum(SalesAmount)

Help < Back Next > Cancel

- [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.

New Table or Matrix

Choose the layout

If you choose to show subtotals and grand totals, you can place them above or below the group. Stepped reports show hierarchical structure with indented groups in the same column.

Options:

☒ Show subtotals and grand totals

☐ Blocked, subtotal below

☐ Blocked, subtotal above

☐ Stepped, subtotal above

☒ Expand/collapse groups

Preview

Bike Category	[SalesYear]	Total
[BikeCategory]	[Sum(SalesAmt)]	[Sum(SalesAmt)]
Total	[Sum(SalesAmt)]	[Sum(SalesAmt)]

Help < Back Next > Cancel

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

New Table or Matrix

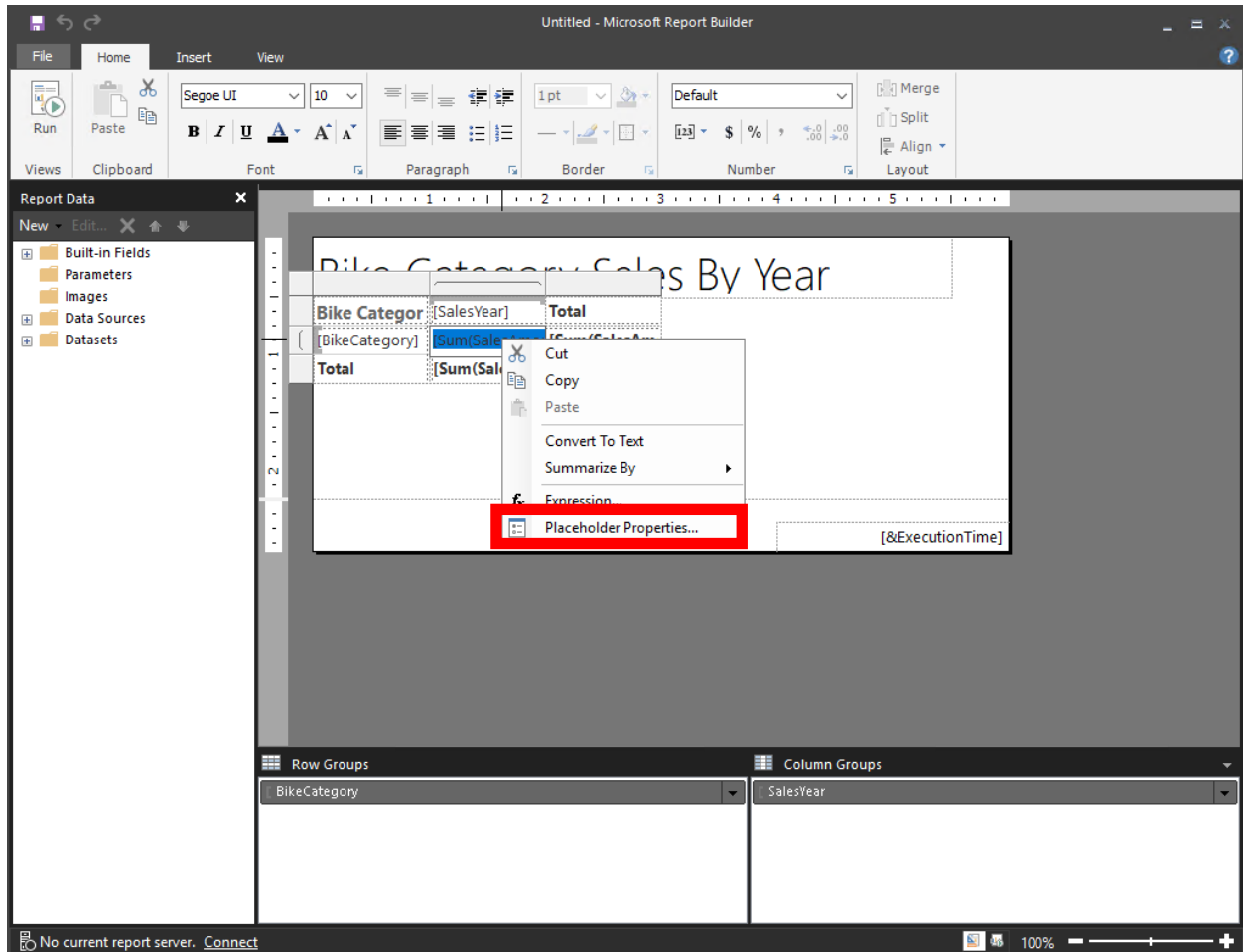
Preview

Preview the report item being created. You can customize the fonts, color schemes and style after you finish the wizard.

Bike Category	[SalesYear]	Total
[BikeCategory]	[Sum(SalesAmt)]	[Sum(SalesAmt)]
Total	[Sum(SalesAmt)]	[Sum(SalesAmt)]

Help < Back Finish >> Cancel

- [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.

The image shows a screenshot of the "Placeholder Properties" dialog box. The "Number" tab is selected in the left sidebar. In the "Category" list, "Currency" is highlighted. The "Sample" field displays "\$12,345.00". The "Decimal places" is set to 2. The checkbox "Use 1000 separator (,)" is checked. Other options like "Show values in:", "Show zero as:", "Negative numbers:", and "Symbol:" are visible but not selected. The "OK" button is highlighted with a blue border.

Placeholder Properties

General
Number
Alignment
Font
Action

Set number and date formatting options.

Category:
Default
Number
Currency
Date
Time
Percentage
Scientific
Custom

Sample
\$12,345.00

Decimal places: 2

☒ Use 1000 separator (,)

☐ Show values in: Thousands

☐ Show zero as: -

Negative numbers:
(\$12,345.00)
-\$12,345.00
\$-12,345.00
\$12,345.00-

Symbol:
\$ English (United States)

☐ Show symbol after value
☐ Include a space

Current regional settings: English (United States)

Help OK Cancel

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

Microsoft Report Builder interface showing a report titled "Bike Category Sales By Year". The report contains a table with the following structure:

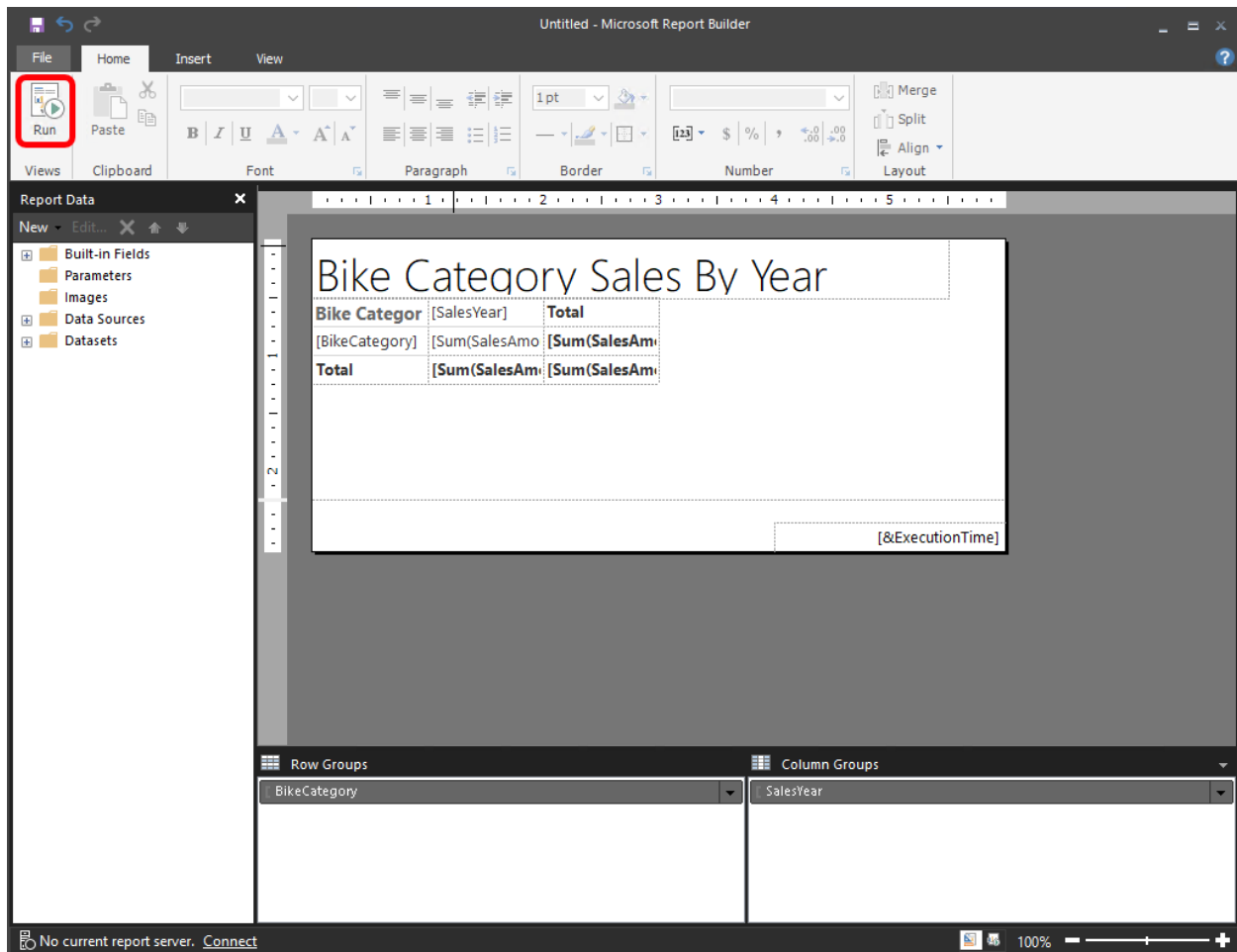
Bike Category	[SalesYear]	Total
[BikeCategory]	Sum(SalesAmo	Sum(SalesAm
Total	Sum(SalesAm	Sum(SalesAm

Red arrows point to the cells containing "Sum(SalesAm" in the second and third rows of the table. The "Report Data" pane on the left shows the following categories:

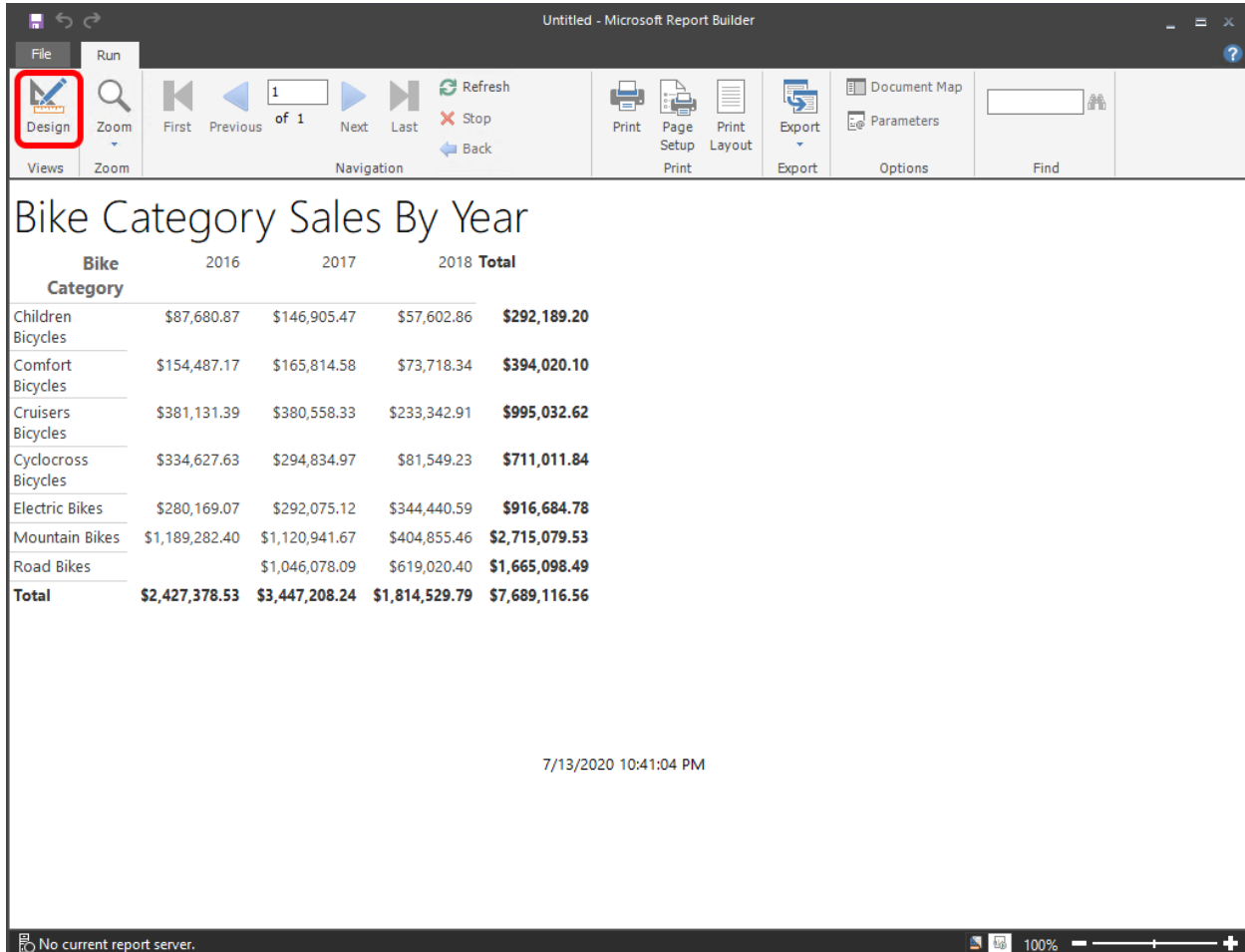
- Built-in Fields
- Parameters
- Images
- Data Sources
- Datasets

The "Row Groups" pane at the bottom shows "BikeCategory" and the "Column Groups" pane shows "SalesYear". The status bar at the bottom indicates "No current report server. Connect".

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



- [17] The generated report should be 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.



Untitled - Microsoft Report Builder

File Run

Design Zoom First Previous of 1 Next Last Refresh Stop Back

Print Page Setup Print Layout Export Parameters Options Find

Bike Category Sales By Year

Bike Category	2016	2017	2018	Total
Children Bicycles	\$87,680.87	\$146,905.47	\$57,602.86	\$292,189.20
Comfort Bicycles	\$154,487.17	\$165,814.58	\$73,718.34	\$394,020.10
Cruisers Bicycles	\$381,131.39	\$380,558.33	\$233,342.91	\$995,032.62
Cyclocross Bicycles	\$334,627.63	\$294,834.97	\$81,549.23	\$711,011.84
Electric Bikes	\$280,169.07	\$292,075.12	\$344,440.59	\$916,684.78
Mountain Bikes	\$1,189,282.40	\$1,120,941.67	\$404,855.46	\$2,715,079.53
Road Bikes		\$1,046,078.09	\$619,020.40	\$1,665,098.49
Total	\$2,427,378.53	\$3,447,208.24	\$1,814,529.79	\$7,689,116.56

7/13/2020 10:41:04 PM

No current report server.

- [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.

