

# Microsoft SQL Server 2008 Reporting Services

## Table of Contents

INTRODUCTION .....	INTRO-1
Prerequisites .....	INTRO-2
Installing the Practice Files .....	INTRO-3
Software Requirements .....	INTRO-3
Microsoft Sample Databases .....	INTRO-3
Installation .....	INTRO-4
About the Author .....	INTRO-5
INTRODUCING SQL SERVER REPORTING SERVICES .....	1-1
Tour of Features .....	1-2
Feature Overview .....	1-2
Supported Report Types .....	1-3
Supported Output Formats .....	1-3
Data Sources .....	1-4
Programming Reporting Services .....	1-4
Deployment and Administration Features .....	1-5
What's New in SQL Server 2008 Reporting Services .....	1-6
Reporting Services Architecture .....	1-8
Report Server .....	1-8
Report Server Database .....	1-8
Report Designer .....	1-9
Report Manager .....	1-10
Reporting Services Configuration Tool .....	1-11
Report Server Command-Line Utilities .....	1-12
Report Builder .....	1-13
Report Models .....	1-13
Reporting Services and SharePoint .....	1-15
Why Use SharePoint Integrated Mode? .....	1-15
Report Server Projects .....	1-17
Creating a Report Server Project .....	1-17
Report Server Project Files .....	1-18
Creating Data Sources .....	1-19
Creating a Shared Data Source .....	1-19
Creating Reports .....	1-22
Using the Report Wizard .....	1-22

Importing Microsoft Access Reports .....	1-31
Creating a New Blank Report .....	1-34
Using the Visual Studio Report Designer.....	1-35
The Report Dataset.....	1-35
The Report Design.....	1-35
Running Reports.....	1-39
Report Execution Options .....	1-39
Output Options.....	1-39
LAB 1: INTRODUCING SQL SERVER REPORTING SERVICES.....	1-45
Lab 1 Overview.....	1-46
Create a Report Using the Report Wizard .....	1-47
CREATING TABULAR AND LIST REPORTS.....	2-1
Creating Your First Tabular Report.....	2-2
Working with Datasets and Data Regions .....	2-12
Adding a Dataset to a Report.....	2-12
Adding a Data Region to a Report .....	2-14
Associating a Data Region with a Dataset.....	2-14
Adding Controls to a Report .....	2-17
Adding Fields to a Data Region .....	2-17
Working with Other Report Item Types.....	2-19
Accessorizing Reports .....	2-26
Is it a Table or a Tablix?.....	2-26
Adjusting Tablix Properties .....	2-26
Adding Page Headers and Footers to the Report.....	2-28
Adjusting Report Properties .....	2-29
Adding Rows and Columns to a Tablix Region.....	2-30
Merging and Splitting Cells .....	2-31
Creating a List Report.....	2-32
Working with Rich Text.....	2-36
Rich Text.....	2-37
LAB 2: CREATING REPORTS.....	2-51
Lab 2 Overview.....	2-52
Create a Shared Data Source .....	2-53
Create a Report from Scratch.....	2-55
Create a Mail Merge Report with Rich Text.....	2-62

CALCULATIONS AND FORMATTING.....	3-1
Creating Expressions.....	3-2
Expression Rules .....	3-2
Using the Expression Editor.....	3-3
Mathematical Calculations .....	3-6
String Expressions .....	3-7
Conditional Tests .....	3-8
Null Handling.....	3-10
Using Other Built-In Functions .....	3-12
Creating and Using Custom Functions .....	3-17
Using the Global Collections.....	3-21
Fields Collection.....	3-21
Globals Collection .....	3-21
User Collection.....	3-23
Parameters Collection.....	3-23
ReportItems Collection.....	3-24
Variables Collection .....	3-25
Formatting Items.....	3-28
Formatting Text Boxes Using the Toolbars.....	3-28
Formatting Text Boxes Using the Properties Window .....	3-29
Formatting Text Boxes Using the Text Box Properties Dialog Box.....	3-33
Formatting Tablix Rows and Columns .....	3-36
Conditional Formatting.....	3-39
Conditional Formatting and Rich Text.....	3-43
LAB 3: CALCULATIONS AND FORMATTING.....	3-49
Lab 3 Overview.....	3-50
Reigning in a Long Text Field .....	3-51
Calculating the Price of Books.....	3-55
Highlighting Large Book Sales.....	3-58
GROUPING AND SORTING .....	4-1
Creating Groups .....	4-2
The Grouping Pane.....	4-2
The Details Group.....	4-3
Adding a Row Group.....	4-3
Adding an Adjacent Row Group.....	4-5
Editing Group Properties.....	4-9
Adding Group Headers and Footers .....	4-9

Calculating Totals and Percentages .....	4-11
An Example: Counting Rows in rptCustomersGrouped ByCountry2 .....	4-11
An Example: Summing Sales in rptEmployeeSales .....	4-12
Scope .....	4-14
Calculating Percentages .....	4-16
Interactive Sorting .....	4-19
An Example: rptCustomersIntSort .....	4-20
An Example: rptCustomersIntSort2 .....	4-22
Creating Drill-Down Reports .....	4-24
A Drill-Down Example .....	4-25
<b>LAB 4: GROUPING AND SORTING .....</b>	<b>4-31</b>
Lab 4 Overview .....	4-32
Create a Report with Nested Groups .....	4-33
Create a Report with Percentages .....	4-36
Create a Drill-Down Report .....	4-40
<b>WORKING WITH PARAMETERS .....</b>	<b>5-1</b>
Creating Report Parameters .....	5-2
Parameters and Stored Procedures .....	5-2
Understanding Report and Dataset Parameters .....	5-9
Report Parameters .....	5-9
Dataset Parameters .....	5-12
Reordering Report Parameters .....	5-13
Displaying Parameter Values on the Report .....	5-13
Using Parameters with Ad-Hoc SQL .....	5-15
Using Unbound Parameters .....	5-17
Creating Drop-Down List Parameters .....	5-19
Displaying the Parameter Value and Label for a Drop-Down List Parameter .....	5-22
Cascading Parameters .....	5-24
Parameterized Sorting .....	5-28
Multivalued Parameters .....	5-36
Creating a Report Employing a Multivalued Parameter .....	5-36
Referencing the Multivalued Parameter Values in a Heading ..	5-37
Debugging Parameter Issues .....	5-40
<b>LAB 5: WORKING WITH PARAMETERS .....</b>	<b>5-45</b>
Lab 5 Overview .....	5-46

Create a Parameterized Report.....	5-47
Create a Drop-Down List Parameter .....	5-52
Work with Multivalued Parameters .....	5-56
<b>CREATING MATRIX REPORTS AND CHARTS.....</b>	<b>6-1</b>
Creating a Matrix Report.....	6-2
Basic Steps to Create a Matrix Report.....	6-2
Accessorizing Your Matrix Reports.....	6-7
Available Summary Statistics.....	6-7
Working with Row and Column Groups .....	6-8
Working with Totals.....	6-13
Adding Data Cells .....	6-16
SQL Server 2008 Matrix Features .....	6-21
Adding Adjacent Dynamic Columns to a Matrix.....	6-21
Adding Adjacent Static Columns to a Matrix.....	6-23
Adding a Percentage to a Matrix Report.....	6-24
Creating a Chart .....	6-27
Basic Steps to Create a Chart .....	6-27
SQL Server 2008 Chart Changes .....	6-30
Chart Anatomy .....	6-31
Formatting a Chart.....	6-32
Adding a Series to a Chart.....	6-37
Exploring the Charting Possibilities .....	6-39
Chart Talk .....	6-39
Chart Types .....	6-39
Column Charts .....	6-41
Line Charts.....	6-42
Shape Charts .....	6-43
Bar Charts.....	6-44
Area Charts.....	6-45
Range Charts.....	6-45
Scatter Charts .....	6-47
Polar Charts .....	6-48
Charting Tips.....	6-48
Adding Gauges to a Report .....	6-49
Basic Steps to Creating a Gauge Report.....	6-49
Gauge Anatomy .....	6-51
Adding a Gauge to an Existing Report.....	6-52
<b>LAB 6: CREATING MATRIX REPORTS AND CHARTS.....</b>	<b>6-57</b>

Lab 6 Overview .....	6-58
Create a Matrix Report with Subtotals .....	6-59
Create a Stacked Column Chart.....	6-61
Create a Pie Chart with Point Labels.....	6-64
Add a Gauge to an Existing Matrix Report .....	6-67
<b>MANAGING REPORTING SERVICES .....</b>	<b>7-1</b>
Deploying Reporting Services Projects .....	7-2
Planning for Deployment.....	7-2
Setting the Active Configuration.....	7-2
Creating a Custom Configuration.....	7-4
Configuring the Report Project.....	7-4
Deploying a Reporting Services Project .....	7-7
Deploying Individual Reports and Data Sources .....	7-7
Redeploying Shared Data Sources.....	7-8
Exporting Reports and Printing.....	7-9
Exporting Reports .....	7-9
Client-Side Printing .....	7-12
Report Manager.....	7-15
Displaying or Hiding Report Manager Details .....	7-16
Navigating Around Report Manager .....	7-18
Running Reports .....	7-18
Managing Folders and Files.....	7-19
Managing Reports and Data Sources.....	7-19
Managing Generic Site Settings .....	7-20
Other Things You Can Do with Report Manager .....	7-21
Creating Linked Reports .....	7-22
<b>LAB 7: MANAGING REPORTING SERVICES.....</b>	<b>7-31</b>
Lab 7 Overview.....	7-32
Deploy a Report to the Local Reporting Services Server .....	7-33
Export a Report to PDF and Excel Formats .....	7-35
Create Linked Reports.....	7-39
<b>SECURITY .....</b>	<b>8-1</b>
Reporting Services Security .....	8-2
Securing Access to Reports .....	8-3
Authorizing Users at the Home Level .....	8-3
Authorizing Users at Project Level.....	8-6
Managing Reporting Services Roles.....	8-8

Reporting Services and Basic Authentication.....	8-11
Reporting Services and Secure Sockets Layer (SSL) .....	8-13
Enabling SSL .....	8-13
Requiring SSL.....	8-15
Data Source Security.....	8-18
Managing Data Source Security from Visual Studio .....	8-18
Four Choices for Managing Credentials .....	8-19
Which SQL Server Permissions Are Needed for a Report? .....	8-22
Managing Data Source Security from Report Manager .....	8-23
LAB 8: SECURITY.....	8-27
Lab 8 Overview.....	8-28
Set Up Report Server Security Using Report Manager .....	8-29
Managing Data Source Security .....	8-34
PROGRAMMING REPORTING SERVICES.....	9-1
The Reporting Services APIs.....	9-2
URL Access.....	9-3
Executing Reports via URLs .....	9-3
Integrating a Report into a Web Application Using URL Access .....	9-11
Using the Report Viewer Controls .....	9-19
Server vs. Local Reports.....	9-19
Using the Web Report Viewer Control with Server Reports .....	9-19
Using the Windows Report Viewer Control with Server Reports.....	9-25
Using the Report Viewer Control with Local Reports.....	9-28
Using the Web Report Viewer Control with Local Reports .....	9-28
Using the Windows Report Viewer Control with Local Reports.....	9-34
LAB 9: PROGRAMMING REPORTING SERVICES .....	9-39
Lab 9 Overview.....	9-40
Integrate a Reporting Services into a Web App Using URL Access.....	9-41
Employ the Server Report Viewer Control in a Web App .....	9-49
Employ the Local Report Viewer Control in a Web App .....	9-51
ADVANCED REPORTING SERVICES PROGRAMMING .....	10-1
Using the Reporting Services Web Service.....	10-2
A Tale of Two Endpoints.....	10-2

Why Use the Web Service? .....	10-3
Why Not Use the Web Service API? .....	10-3
Using the Report Server Web Service .....	10-3
An Example: The CallReportServiceVB.aspx and CallReportServiceCS.aspx Pages .....	10-12
A Second Example: Programmatically Creating Subscriptions .....	10-22
Working with Custom Assemblies .....	10-48
What's Wrong with the Code Window? .....	10-48
Creating a Custom Assembly .....	10-49
A Custom Assembly Example .....	10-50
Security and Custom Assemblies .....	10-58
LAB 10: ADVANCED REPORTING SERVICES PROGRAMMING .....	10-63
Lab 10 Overview .....	10-64
Call the Reporting Services Web Service .....	10-65
Create and Deploy a Custom Assembly .....	10-73
SNAPSHOTS AND SUBSCRIPTIONS .....	11-1
Report Caching and Snapshots .....	11-2
Setting Up the NWReportUser Login and User Account .....	11-2
Setting the NWSub Credentials .....	11-3
Report Caching .....	11-4
Report Snapshots .....	11-8
Report History .....	11-11
Creating Subscriptions .....	11-14
Parts of a Subscription .....	11-14
Creating a Standard Subscription .....	11-15
Creating Data-Driven Subscriptions .....	11-20
Creating the Data-Driven Query .....	11-20
A Data-Driven Example .....	11-23
LAB 11: SNAPSHOTS AND SUBSCRIPTIONS .....	11-35
Lab 11 Overview .....	11-36
Important Lab Setup .....	11-36
Enable Caching for a Report .....	11-37
Create a Snapshot with History .....	11-41
Create a File-Share Standard Subscription .....	11-46
AD-HOC REPORTING WITH REPORT BUILDER 2.0 .....	12-1
A Tale of Two Report Builders .....	12-2



Report Builder 1.0 .....	12-2
Report Builder 2.0 .....	12-3
Which Report Builder Version to Use? .....	12-4
Report Builder 2.0 Setup and Configuration .....	12-5
Launching Report Builder 2.0 .....	12-5
Report Manager Link .....	12-5
Report Builder Data Sources .....	12-7
Creating the Login, Shared Data Sources, and Folder Used in the Chapter Samples .....	12-7
Getting Started with Report Builder 2.0 .....	12-11
Using the New Table or Matrix Wizard .....	12-11
Using the New Chart Wizard.....	12-17
Is That All There Is?.....	12-21
Creating Reports with Report Builder .....	12-22
Constructing a Report .....	12-22
Report Builder Tour.....	12-23
Creating a Tabular Report .....	12-28
Adding a Group to a Report.....	12-35
Creating Matrix Reports .....	12-38
Adding Totals to a Report .....	12-43
Creating Charts.....	12-45
LAB 12: AD-HOC REPORTING WITH REPORT BUILDER 2.0 .....	12-55
Lab 12 Overview.....	12-56
Create a Matrix Report Using the Wizard .....	12-57
Create a Tabular Report.....	12-63
Create a Pyramid Chart.....	12-70
APPENDIX A: CREATING REPORT MODEL PROJECTS .....	A-1
Creating Report Model Projects.....	A-2
Basic Steps to Creating a Report Model.....	A-2
Creating the Project .....	A-3
Adding a Data Source to a Report Model Project .....	A-5
Creating Data Source Views.....	A-6
Generating Report Models Using the Report Model Wizard.....	A-8
The Generated Model.....	A-13
Refining and Enhancing the Report Models .....	A-14
Deploying Report Model Projects .....	A-18
Deploying Report Models.....	A-18
Creating Reports on Report Models .....	A-19

INDEX.....INDEX-1