

Contents

| | |
|--|--------------|
| Acknowledgments | ix |
| Foreword I | xxi |
| Foreword II | xxiii |
| Introduction | xxv |
| Part One: Getting Started | 1 |
| Chapter 1: What Can You Do with Reporting Services? | 3 |
| What We've Learned | 3 |
| Who Uses Reporting Services? | 4 |
| Application and Reporting Technology | 5 |
| Information, Now! | 6 |
| Solution Types | 7 |
| Out-of-the-Box Reports | 8 |
| Server-Based Reports | 8 |
| User-Designed Reports | 9 |
| Designing Reports | 9 |
| Simple Application Integration | 11 |
| Launching Reports from an Application | 12 |
| User Interaction and Dynamic Reporting | 12 |
| Intranet and Internet Report Access | 14 |
| Seamless Application Integration | 14 |
| Web Application Integration | 14 |
| Portal Integration | 15 |
| Windows Application Integration | 15 |
| Managing and Customizing the Report Server | 16 |
| Summary | 17 |
| Chapter 2: Introduction to Microsoft SQL Server Reporting Services 2005 | 19 |
| Traditional Application Reporting | 20 |
| Today's Reporting Requirements | 21 |
| Business Intelligence Defined | 21 |
| Automation to the Rescue — a Scenario | 22 |
| Challenges of Existing Reporting Solutions | 23 |
| How Does SQL Server Reporting Services Meet This Challenge? | 24 |

Contents

| | |
|---|-----------|
| Business Intelligence Solutions | 25 |
| Who Uses Reports and Why? | 25 |
| Executive Leadership | 26 |
| Managers | 26 |
| Information Workers | 26 |
| Customers | 26 |
| Vendors and Partners | 27 |
| Reporting Solution Alternatives | 27 |
| Reporting with Relational Data (OLTP) | 27 |
| Relational Data Warehouses | 27 |
| Reporting with Multidimensional Data (OLAP) | 28 |
| The Reporting Lifecycle | 29 |
| Report Delivery Application Types | 29 |
| Web Browser | 29 |
| Office Applications | 30 |
| Programmability | 30 |
| Subscriptions | 30 |
| Report Formats | 30 |
| Importing Data/Exchanging Data | 31 |
| Ad Hoc Reporting | 31 |
| System Requirements | 31 |
| Reporting Services Components | 33 |
| Server Components | 33 |
| Client Components | 33 |
| Getting Help with Books Online | 33 |
| Adventure Works Sample Databases | 33 |
| Administrative Tools | 34 |
| Command-Line and Unattended Installation | 34 |
| Log Files | 34 |
| Designing Reports | 34 |
| Form Reports | 34 |
| Tabular Reports | 34 |
| Groupings and Drill-Down | 35 |
| Drill-Through Reports | 35 |
| Multicolumn Reports | 35 |
| Matrix | 35 |
| Charts | 35 |
| Data Sources | 35 |
| Queries | 35 |
| OLAP Reporting | 36 |
| Using Business Intelligence Development Studio | 36 |
| Report Wizard | 36 |
| The .NET Framework | 37 |

| | |
|---|-----------|
| Extending Reporting Services | 37 |
| Data Processing Extensions | 37 |
| Delivery Extensions | 37 |
| Security Extensions | 37 |
| Rendering Extensions | 38 |
| Scripting | 38 |
| Subscriptions | 38 |
| Securing Reports | 38 |
| The Report Manager | 39 |
| Designing Reports | 39 |
| URL Access to Reports | 40 |
| Rendering Reports in Program Code | 40 |
| Report Definition Language | 41 |
| Deploying Reports | 41 |
| Designing and Architecting Report Solutions | 41 |
| Third-Party Product Integration | 41 |
| Summary | 42 |
| | |
| Chapter 3: Reporting Services Architecture | 45 |
| <hr/> | |
| Reporting Lifecycle | 46 |
| Authoring | 46 |
| Management | 46 |
| Delivery | 47 |
| Reporting Services 2005 | 47 |
| Platform Overview | 47 |
| Reporting Services XML Web Service | 49 |
| Report Server | 50 |
| Reporting Services Catalog | 61 |
| Report Design | 64 |
| Report User Interface | 66 |
| Summary | 67 |
| | |
| Part Two: Report Design | 69 |
| | |
| Chapter 4: Basic Report Design | 71 |
| <hr/> | |
| Report Design 101 | 72 |
| Using the Report Wizard | 72 |
| The Report Wizard | 75 |
| Establishing a Data Source | 75 |
| Building a Query | 78 |

Contents

| | |
|---|------------|
| Defining the Report Structure | 82 |
| Specifying the Deployment Location | 84 |
| The Report Designer | 85 |
| Scale Units | 86 |
| Report Definition Language | 92 |
| Report Migration and Integration | 93 |
| Importing Access Reports | 93 |
| Plan for Extensibility | 94 |
| Browser Compatibility | 94 |
| Offline Viewing | 94 |
| Mobile Device Support | 95 |
| Report Items and Data Regions | 95 |
| Textbox Report Item | 96 |
| Line Report Item | 98 |
| Rectangle Report Item | 98 |
| Image Report Item | 98 |
| Subreport Item | 102 |
| Chart Report Item | 102 |
| Drill-Down and Drill-Through Reports | 106 |
| Tabular Reports | 108 |
| Grouping Data | 108 |
| Subtotals | 111 |
| Formatting | 112 |
| Standard Formatting | 114 |
| Explicit Formatting | 115 |
| Conditional Formatting | 116 |
| Multiple Columns | 118 |
| Pagination Control | 119 |
| Page Breaks for a Rectangle | 119 |
| Page Breaks for a List | 120 |
| Page Breaks for a Table | 120 |
| Page Breaks for a Group | 120 |
| Page Breaks for a Matrix | 121 |
| Page Breaks for a Chart | 121 |
| Printing Considerations | 121 |
| Summary | 122 |
| Chapter 5: Designing Data Access | 125 |
| Reporting for Relational Data | 127 |
| Query Basics | 127 |
| Data Sources | 128 |
| Data Sources and Query Languages | 130 |

| | |
|--|------------|
| Filtering Techniques | 131 |
| Parameter Concepts | 132 |
| Filtering Data with Query Parameters | 134 |
| Report Parameters | 135 |
| Basing a Parameter on a Query | 137 |
| Cascading Parameters | 138 |
| Using Stored Procedures | 148 |
| Filtering Data with Report Parameters | 151 |
| Reporting for Analytical Data | 155 |
| SQL Server Analysis Services | 155 |
| Using Other Data Sources | 173 |
| Microsoft Access | 174 |
| Microsoft Excel | 178 |
| Oracle P/L SQL | 178 |
| Sybase Adaptive Server | 179 |
| Best Practices | 180 |
| Summary | 180 |
| | |
| Chapter 6: Advanced Report Design | 183 |
| | |
| Anatomy of a Text Box | 184 |
| Grouping Data | 186 |
| Data Regions | 187 |
| Using the List Item | 187 |
| Creating a Tabular Report Using a Table | 192 |
| Column Placement and Indentation | 199 |
| Headers and Footers | 203 |
| Aggregate Functions and Totals | 205 |
| Using the Expression Builder | 206 |
| Drill-Down Reports | 208 |
| Creating a Document Map | 210 |
| Links and Drill-Through Reports | 212 |
| Bookmarks and Links | 212 |
| Drill-Through Reports | 212 |
| Recursive Relationships | 214 |
| Subreports | 218 |
| Designing Matrix Reports | 221 |
| Subtotals and Summaries | 224 |
| Drill-Down in a Matrix | 225 |
| Chart Reports | 228 |
| Chart Types | 228 |
| Column Charts | 230 |
| Area and Line Charts | 233 |

Contents

| | |
|--|------------|
| Pie Charts | 233 |
| Bubble Charts | 235 |
| The Anatomy of a Chart | 237 |
| Chart Report Exercise | 239 |
| Custom Fields | 245 |
| Conditional Expressions | 246 |
| IIF() Is Your Friend | 246 |
| Using Custom Code | 249 |
| Why Visual Basic? | 249 |
| Using Custom Code in a Report | 250 |
| Using a Custom Assembly | 251 |
| Custom Assembly Security | 253 |
| Errors, Warnings, and Debugging Code | 254 |
| Designing for Mobility | 254 |
| Best Practices and Tips | 259 |
| Summary | 260 |
| | |
| Chapter 7: Report Solution Patterns and Recipes | 261 |
| | |
| Reporting Project Requirement Guidelines | 262 |
| Key Success Factors | 262 |
| Reporting on Existing Data Sources | 263 |
| Building an End-to-End Reporting Solution | 264 |
| Report Specifications | 265 |
| Development Phases | 266 |
| Migrating and Converting Reports | 268 |
| Working with the Strengths and Limitations of the Architecture | 269 |
| Report Recipes | 272 |
| Greenbar Reports | 272 |
| Multiple Criterion Report Filtering | 277 |
| Multi-field Data Point Charts | 279 |
| TOP X and “Other” Chart | 285 |
| Dynamic Images: Scales and Gauges | 286 |
| Creating a Business Scorecard | 289 |
| Creating Sparklines | 297 |
| Using Field Values in Page Headers and Footers | 303 |
| Group Continued in Page Header or Footer | 304 |
| Dynamic Grouping | 305 |
| Sorting on Column Headers | 308 |
| Dynamic Fields and Columns | 315 |
| Modifying Data from a Report | 316 |
| Selected and Deselected Item List | 320 |

| | |
|--|------------|
| Using Advanced and Third-Party Report Items | 324 |
| Dynamic Image Content | 328 |
| Using Advanced and Third-Party Controls for Parameter Selection | 335 |
| Summary | 337 |
| Part Three: Enabling End User Reporting with Report Builder | 339 |
| Chapter 8: Reporting Services Report Models | 341 |
| Getting Started | 341 |
| Creating the Report Model Data Source | 342 |
| Building a Data Source View | 345 |
| Building the Report Model | 353 |
| Report Model Wizard | 353 |
| Working with Reporting Services Report Models | 357 |
| Deploying the Report Model | 362 |
| Building Report Models from Analysis Services Databases | 363 |
| Summary | 366 |
| Chapter 9: Report Builder | 369 |
| Building Report Models | 369 |
| Working with the Report Builder | 370 |
| Accessing the Report Builder | 370 |
| Building a Report | 371 |
| Formatting a Report | 385 |
| Filtering and Sorting Reports | 389 |
| Adding Calculations with Expressions | 394 |
| Administration | 397 |
| Summary | 397 |
| Part Four: Administering Reporting Services | 399 |
| Chapter 10: Report Management | 401 |
| Report Server Content | 401 |
| Managing Content Items | 402 |
| Report Manager | 402 |
| SQL Server Management Studio | 404 |
| Other Utilities | 405 |
| Programmatic Interfaces | 405 |
| Securing Report Server Content | 406 |
| Role-Based Security | 406 |
| Tasks | 407 |

Contents

| | |
|--------------------------------------|------------|
| Roles | 407 |
| Role Assignments | 410 |
| Security Inheritance | 413 |
| Item-Level Security | 413 |
| System-Level Security | 413 |
| Site Settings | 414 |
| Properties | 414 |
| My Reports | 415 |
| Securing My Reports | 416 |
| Managing Reports | 417 |
| Working in Folders | 417 |
| Report Properties | 418 |
| Linked Reports | 420 |
| Publishing Reports | 421 |
| Updating Reports | 423 |
| Working with Data Sources | 423 |
| Private Data Sources | 424 |
| Shared Data Sources | 424 |
| Creating Data Sources | 424 |
| Data Source Credentials | 426 |
| Updating Data Sources | 426 |
| Managing Report Execution | 427 |
| Report Execution Process | 427 |
| On-demand Report Generation | 428 |
| Working with Cached Instances | 428 |
| Snapshots and History | 429 |
| Report History | 431 |
| Scheduling Reports | 432 |
| Delivering Reports | 433 |
| E-Mail Delivery | 433 |
| File Share Delivery | 434 |
| Report Subscriptions | 435 |
| Snapshot-Triggered Subscriptions | 436 |
| Schedule-Triggered Subscriptions | 436 |
| Data-Driven Subscriptions | 437 |
| Automating Content Management | 437 |
| Automating Subscription Management | 437 |
| Automating Report Deployment | 447 |
| Creating Scripts | 448 |
| Using the RS WMI Provider | 448 |
| Creating a Script Using Code | 449 |
| Summary | 455 |

| | |
|--|------------|
| Chapter 11: Report Server Administration | 457 |
| Deploying Reporting Services | 458 |
| Reporting Services Components | 459 |
| The Report Server | 463 |
| Server Configurations | 467 |
| Configuration Tools | 470 |
| Configuration Utilities | 471 |
| Configuration Files | 474 |
| Backup and Restore Procedures | 474 |
| Backing Up the Report Server Catalog | 474 |
| Backing Up the Encryption Key | 475 |
| Monitoring and Performance | 476 |
| Report Execution | 477 |
| Caching | 477 |
| Exploring the Execution Log | 478 |
| Performance Counters | 480 |
| Summary | 484 |
| | |
| Part Five: Reporting Services Integration and the Reporting Services Web Services | 485 |
| | |
| Chapter 12: Integrating Reporting Services into Custom Applications | 487 |
| URL Access | 488 |
| URL Syntax | 488 |
| Accessing Reporting Services Objects | 489 |
| Reporting Services URL Parameters | 493 |
| Passing Report Information through the URL | 498 |
| Programmatic Rendering | 500 |
| Common Scenarios | 501 |
| Rendering through Windows | 502 |
| Rendering to the Web | 518 |
| Using the ReportViewer Control | 526 |
| Embedding a Server-Side Report in a Windows Application | 527 |
| SharePoint Web Parts | 534 |
| Report Explorer Control | 534 |
| ReportViewer Control | 535 |
| Summary | 535 |

Contents

Chapter 13: Extending Reporting Services **537**

Extension through Interfaces **538**

What Is an Interface? 539

Interface Language Differences 539

Data Processing Extensions — a Detailed Look 541

Creating a Custom Data Processing Extension **544**

The Scenario 544

Creating and Setting Up the Project 544

Creating the DataSetConnection Object 546

Creating the DataSetParameter Class 555

Implementing IDataParameter 555

Creating the DataSetParameterCollection Class 557

Creating the DataSetCommand Class 559

Creating the DataReader Object 571

Installing the DataSetDataProcessing Extension 575

Testing the DataSetDataExtension 577

Summary 580

Appendix A: **583**

Migrating Access Reports

Appendix B: Reporting Services Object Model **589**

Public Properties 617

Appendix C: Transact SQL Command Syntax Reference **619**

Transact-SQL Commands, Clauses, and Predicates **620**

WITH 620

SELECT 620

TOP 621

SELECT INTO 622

FROM 622

WHERE 622

GROUP BY 623

HAVING 623

UNION 623

EXCEPT and INTERSECT 624

ORDER BY 624

CREATE DATABASE 627

Script Comment Conventions 629

Reserved Words 630

| | |
|--|------------|
| Appendix D: Transact SQL System Variables and Functions | 637 |
| System Global variables | 637 |
| System Functions | 641 |
| Index | 653 |

