

HTML5

Visual
Studio

ASP.NET

Windows
Azure

Exchange

SQL
Server

Cloud

Share
Point

Creating SSRS Reports Efficiently Through Best Practices

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YOUR EXPERIENCE

Beginner

Fairly New Report Writer

Comfortable

Written Many Reports

Advanced

Lost Track Of Report Count

Just Checking Options

Managers, QA, Working With Other Tools



OBJECTIVES

- ▶ Lifecycle of a report
- ▶ Templates for creating reports
- ▶ Standards
- ▶ Report Templates
- ▶ Maintaining your report catalog over time

LIFECYCLE OF CREATING A REPORT

Gather requirements
Create design
Mockup report
Sign off from end user
Create report
Test report
Sign off from end user
Deploy report

Rinse and repeat



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Test report

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Rinse and repeat



GATHERING REQUIREMENTS

Standard information

- Title
- Purpose of report
- Description
- Owner of report
- End users
- Security



Show me! Demo 01

GATHERING REQUIREMENTS

Needed features

- Parameters
- Data
- How data should be displayed
- Restrictions for end users
- Charts
- Subscriptions



Show me! Demo 02

CREATING A DESIGN

- Labels matched to database field names
- Algorithms
- Stored procedure / MDX requirements
- Chart requirements
- Subscription requirements
- Security requirements



Show me! **Demo 03**

CREATING A MOCKUP

Example Data

Example formula calculations

Placement of data

Labels

Special features



Show me! Demo 04

USE AN ADDENDUM

Bug fixes

New features

Changes to existing features

New mockup



Show me! Demo 05

REPORT TEMPLATES (PLURAL)

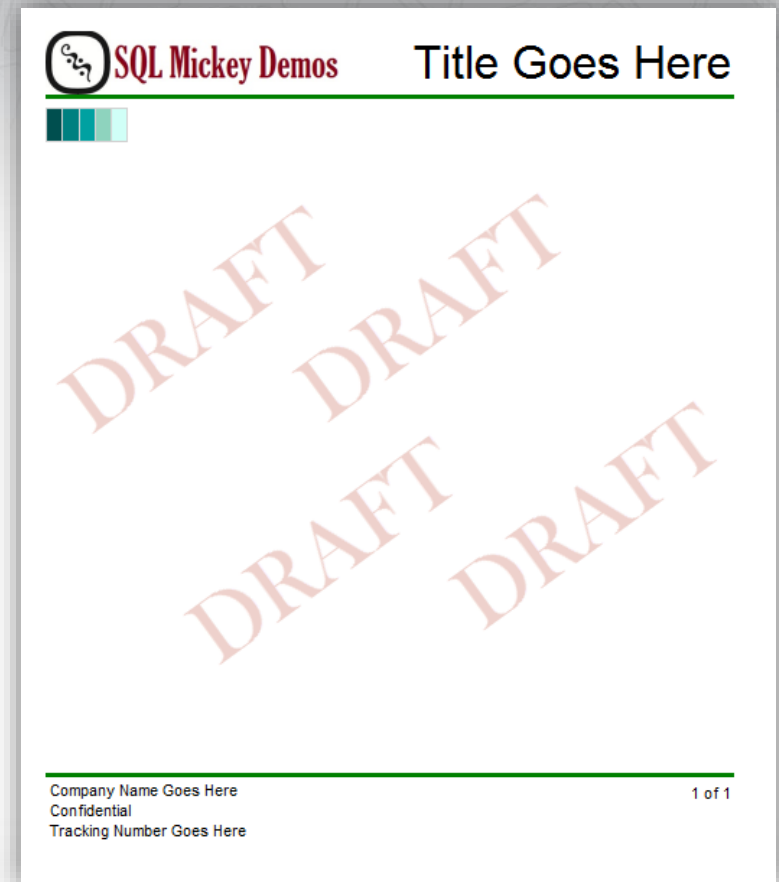
Different layouts

- Orientation
- Paper size

Layout Elements

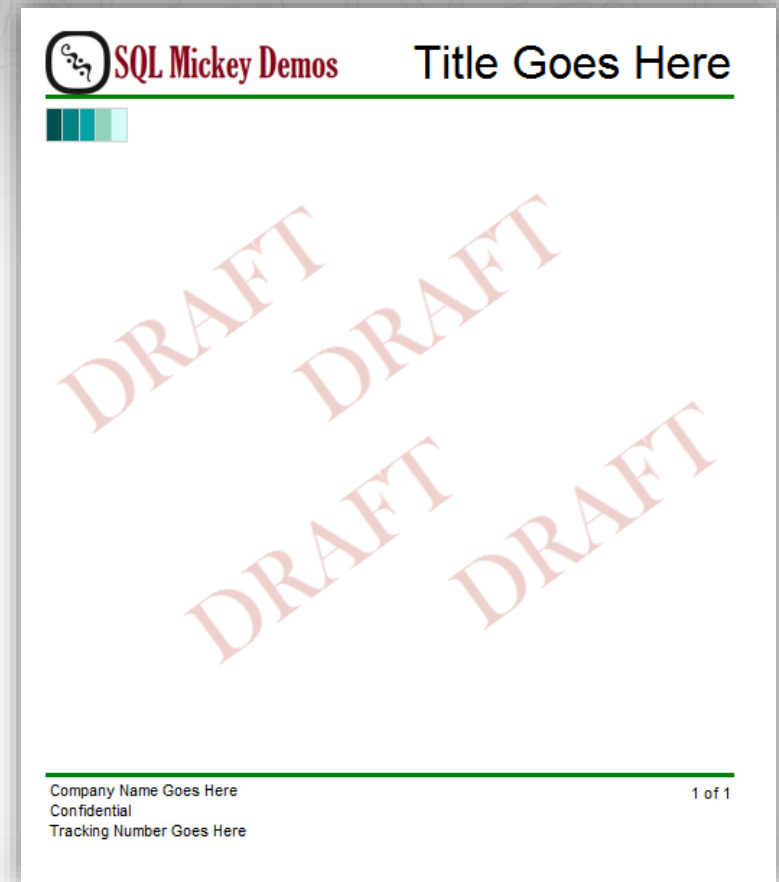
- Header
- Footer
- Tracking Number
- Watermark

Color Scheme



LOCATION FOR TEMPLATES

C:\Program Files (x86)\
Microsoft Visual Studio 10.0\
Common7\
IDE\
PrivateAssemblies\
ProjectItems\
ReportProject



Show me! Demo 06

GENERAL TIPS AND STANDARDS

1. Display the chosen parameter values on the report.
2. Try to standardize on a specific date across related reports for comparison purposes.
3. Test your reports across all export types for readability.
4. Layout the report in a consistent manner.
5. Use a consistent color palate.
6. Keep a “knowledge base” document of techniques you have used that were a pain to figure out.
7. Leverage the report logs to determine usage patterns and load on the system.

MAINTAINING YOUR REPORT CATALOG OVER TIME

Tracking the state of each report

- Tracking number
- New, replacement, archived
- In queue, in progress, in QA, in user acceptance, released

MAINTAINING YOUR REPORT CATALOG OVER TIME

Keep track of change requests

- Immediately document
- Cross reference with tracking number
- How will change affect current users?

When changes are implemented

- Notify all users of changes that are being requested
- Notify all users when change has been deployed

MAINTAINING YOUR REPORT CATALOG OVER TIME

Keep track of owner turn over

- The need of the report will change
- Use of the report will change
- Understanding of the report will change

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QUESTIONS

Please fill out an evaluation so that I can become a better instructor.

Thank You

