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
LIFECYCLE OF CREATING A REPORT

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→ Sign off from end user
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Rinse and repeat
LIFECYCLE OF CREATING A 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
USE AN ADDENDUM

- Bug fixes
- New features
- Changes to existing features
- New mockup
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
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

Discussion
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QUESTIONS

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

Thank You
Presentation
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