

# 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

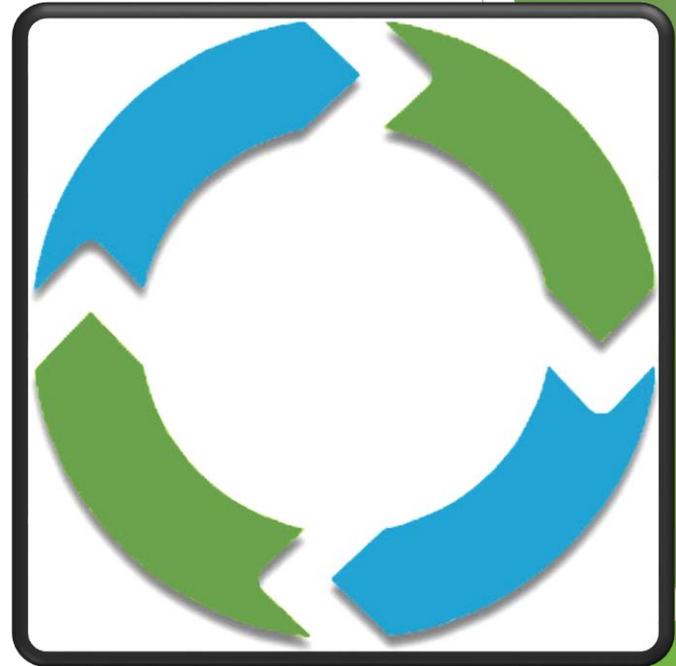
Create report

Test report

Sign off from end user

Deploy report

Rinse and repeat



# Lifecycle of creating a report

Gather requirements

Create design

Mockup report

→ Sign off from end user

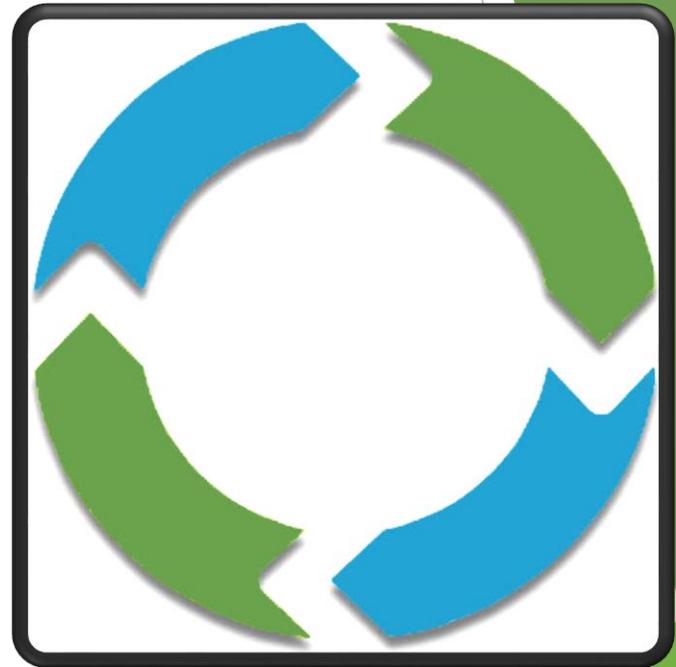
Create report

Test report

→ Sign off from end user

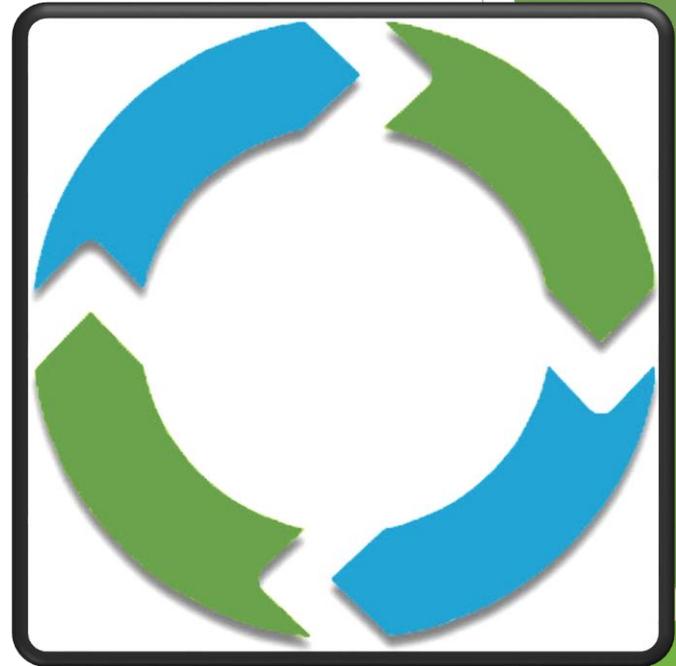
Deploy report

Rinse and repeat



# Lifecycle of creating a report

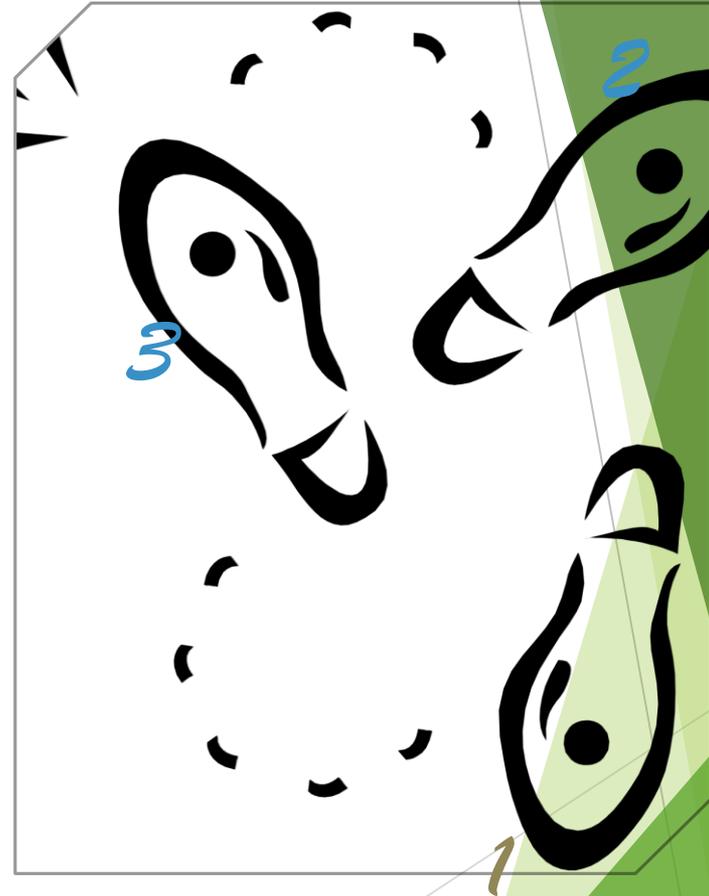
- ➔ Gather requirements
- ➔ Create design
- ➔ Mockup report
- Sign off from end user
- Create report
- Test report
- Sign off from end user
- Deploy report
  
- Rinse and repeat



# Gathering Requirements

## Standard information

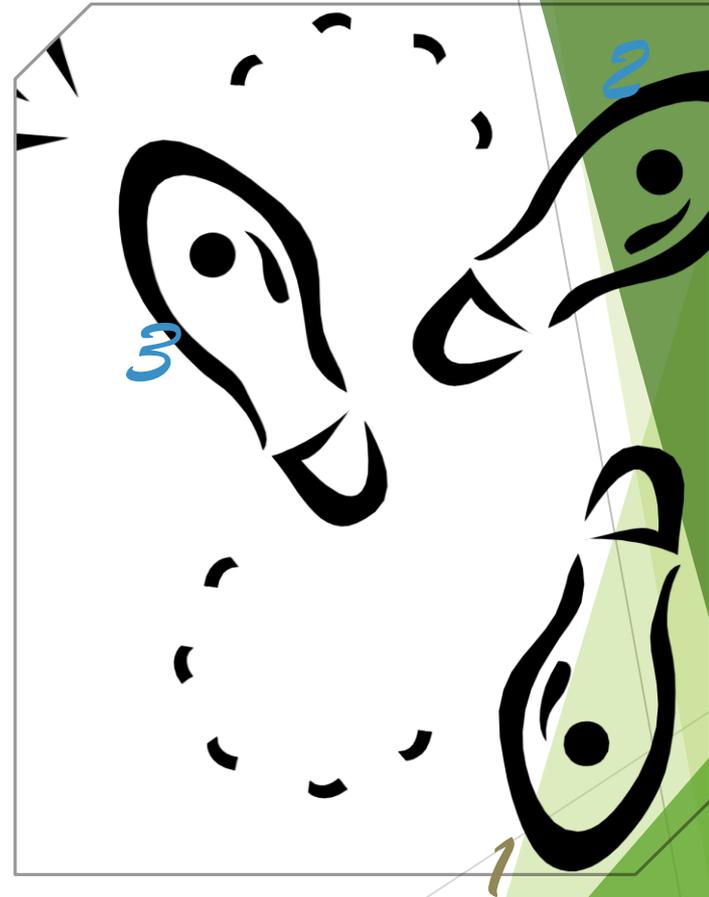
- Title
- Purpose of report
- Description
- Owner of report
- End users
- Security



# Gathering Requirements

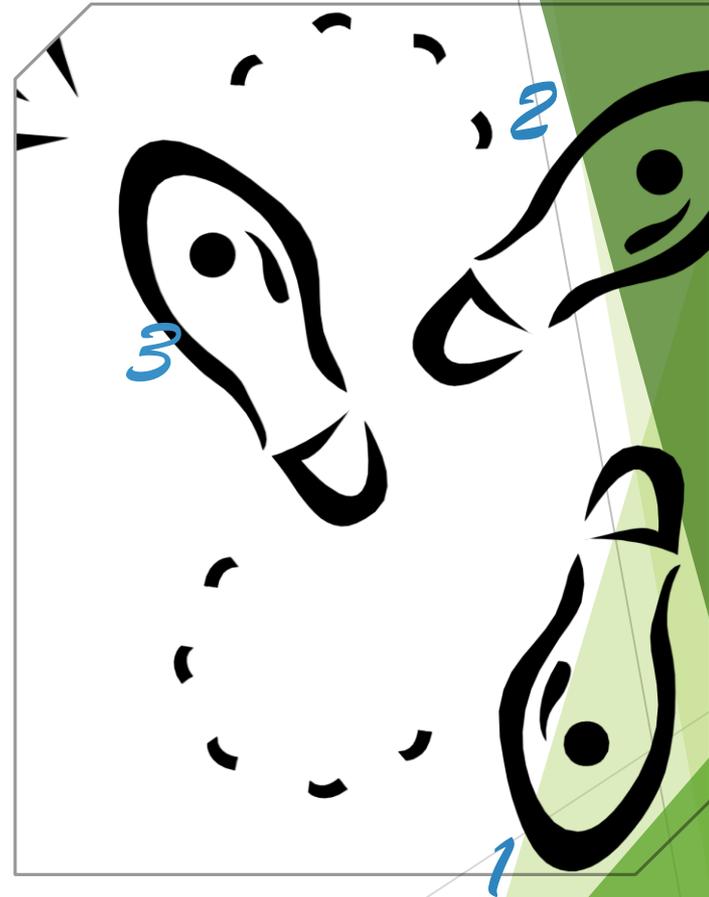
## Needed features

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



## Creating a Design

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



Show me the demo!

## Creating a Mockup

Example Data

Example formula calculations

Placement of data

Labels

Special features



Show me the demo!

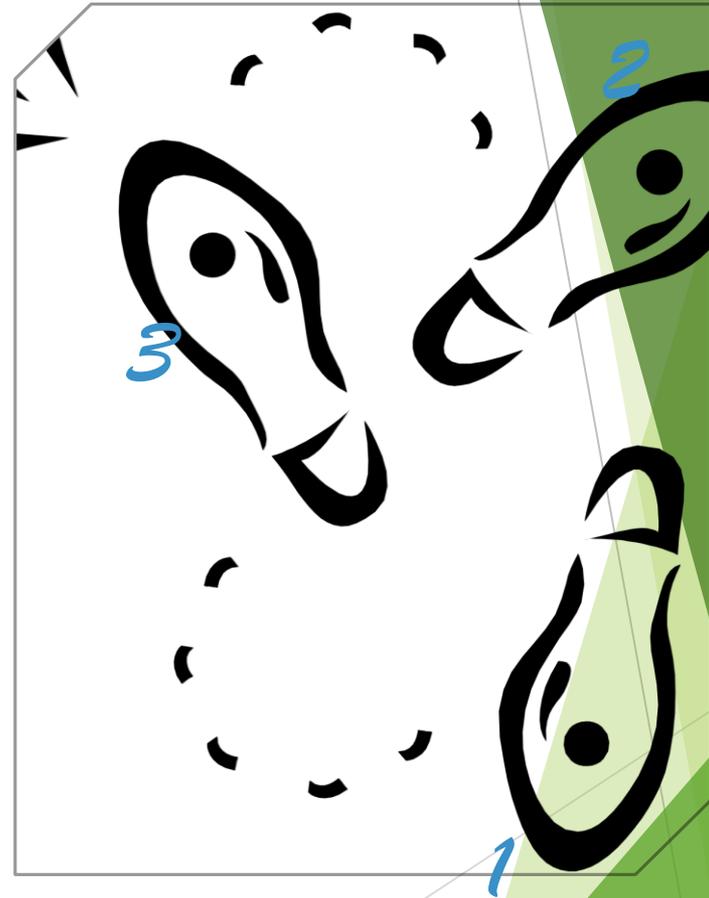
## Use an Addendum

Bug fixes

New features

Changes to existing features

New mockup



Show me the demo!

## Report Templates (plural)

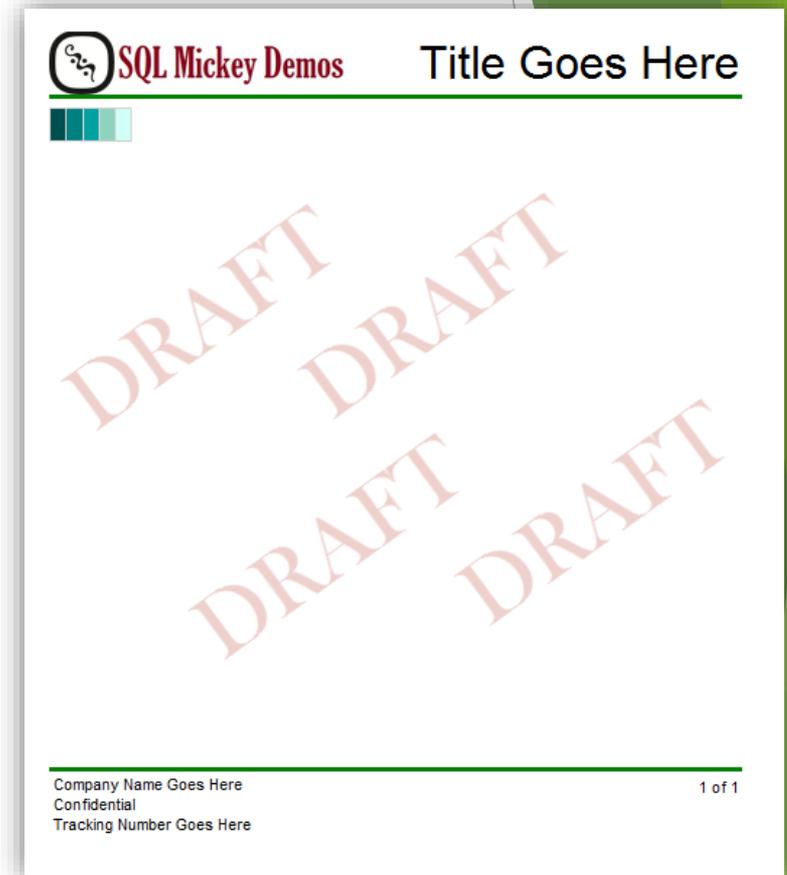
### Different layouts

- Orientation
- Paper size

### Layout Elements

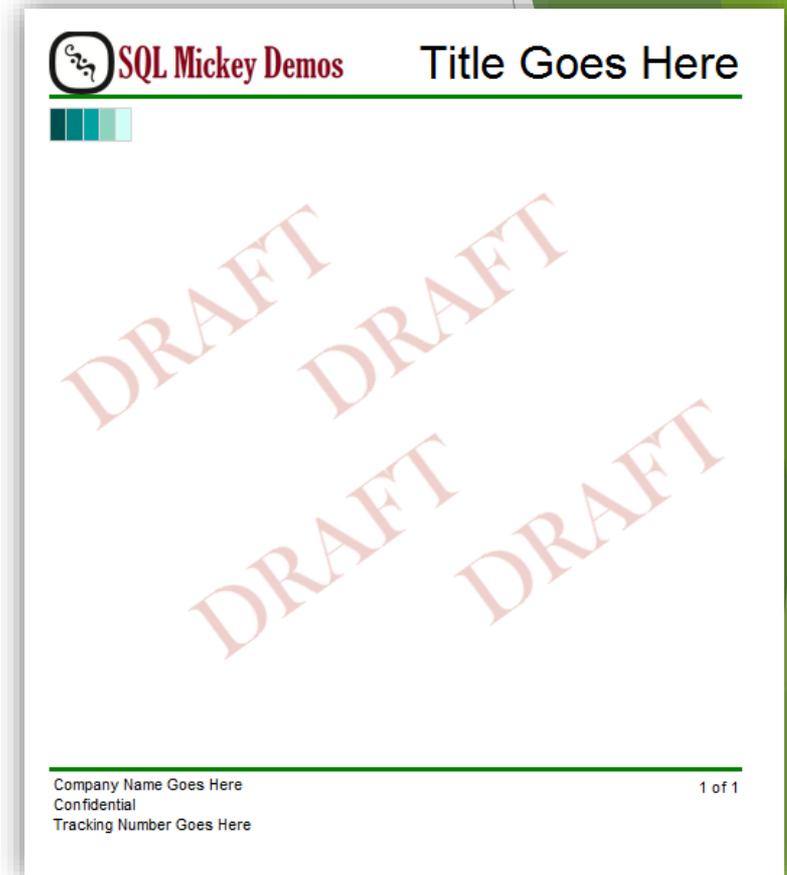
- Header
- Footer
- Tracking Number
- Watermark

### 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

## Presentation

[www.MickeyStuewe.com](http://www.MickeyStuewe.com)

User Group Website

## Blogs

[MickeyStuewe.com](http://MickeyStuewe.com)

[MSSQLTips.com](http://MSSQLTips.com)

## Book

SQL Server 2012 Reporting  
Services Blueprints

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