

Reporting Services

Implementation Considerations

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12/2013

Implementation Considerations

- ▶ What Edition of SQL Server do you need or have available - Developer (cannot be used in production), Standard or Enterprise?
- ▶ How many report users (consumers) will you have?
- ▶ How many reports do you anticipate hosting? (Will you need multiple RS servers in a load-balanced configuration?)
- ▶ How many report developers will you have?
- ▶ How many data sources will you need to access? Do you already have service accounts set up? If not, work with your DBA/Systems Admins to set them up with Read-only and execute stored proc access.
- ▶ How distributed are the users - all in one location, scattered around the globe?

Report Services Installation

- ▶ Determine which App Server Reporting Services should be installed on
- ▶ Determine which SQL Server Reporting Services Databases should be installed on
- ▶ Use the SQL Server installation CD and install Reporting Services
- ▶ Use Reporting Services Configuration to configure the Report Server URL, Service Account, Report Manager URL, Database location and Unattended Service Account

Configure Report Manager

- ▶ Determine who will be the system administrators
- ▶ Grant them permissions in Report Manager System Security
- ▶ Determine whether you will use My Reports feature
- ▶ What kind of folder structure you will implement (Departmental, Project Oriented, Functional, etc)
- ▶ Identify who will need access to what (Excel is good for this)
- ▶ Identify reports that will require heightened security
- ▶ Determine if you need any custom roles
- ▶ Create Folders and assign role permissions, use AD Groups whenever possible

Creating New Reports

- ▶ Receive request for a new report - Gather requirements
- ▶ Determine report audience - who will use this report? Multiple people - in same department, in different departments?
- ▶ What questions must this report answer? What information is needed to support decision-making? What summary information would be useful? What level of detail is needed (is it always needed? Drilldown or drill-thru or sub-report possibilities)
- ▶ What data source will supply the data? All from one data source or combine information from several data sources?
- ▶ Is all data needed available in one table or view? Is a new view needed?
- ▶ How would users like to filter the report? Parameters? Filters? Subsets?
- ▶ How would users like the information sorted? Do they want to be able to change the sort order? On which columns?

Report Formatting

- ▶ Can I use a report template for the basics (Header/Footer)?
- ▶ What is the best control for formatting the information - Table, Matrix, List, Chart - or a combination (Chart + Matrix, for example)
- ▶ What is the best order for the columns
- ▶ Do I need any calculated columns?
- ▶ Do I need any Grouping? Row Groups? Column Groups? What are the grouping levels for this information?
- ▶ Do I need any Aggregations? By Group? Overall?
- ▶ Do I need any additional Expressions on the report? What are they? Can I get all the information I need from the original data sources?

Report Deployment

- ▶ Do we have report deployment policy/procedure already in place?
- ▶ Do we need to deploy to a Test/QA environment first? What is that Report Server URL?
- ▶ If there is no Test/QA environment, I highly recommend you create a folder that is restricted to report developers where you can deploy and test before making it available to your report audience.
- ▶ Do my data sources need to be changed to use the service account?
- ▶ RECOMMENDATION FOR THOSE ENABLING REPORT BUILDER
- ▶ Create a folder called Report Builder data sources and create duplicate copies of the shared data sources for use in Report Builder. Then Hide and remove access to the Data Sources folder to end users.