About the Speaker

David Boll

Senior Developer

Stoneridge: 1.5 years

Microsoft: 6 years

Total Industry Experience: 12 years

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More about David:
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Topics

- Alternatives
- What you need before you begin
- What makes a good design?
- Time expectations
- Quick SSRS object overview (if time)

*Please ask questions as we go. Don't be afraid to interrupt.

Alternatives (save time, save money)

- Inquiry forms
  - Easy to create, data on the fly, customizable, sortable, filterable
- Export to Excel
  - Excel familiarity, ease of use, possibly no customization needed
- List pages
  - Sortable, filterable, able to view details
- Does another report already exist that is close?
  - Modification is easier than from scratch

So you need an actual report

- What you need
  - A good design
  - Visual Studio (you need a license for the DEV machine)
  - Visual Studio components installed for AX
  - Data setup in your DEV environment
- What you will create
  - Classes (Typically three: DP, Controller, Contract)
  - Tables
  - Queries
  - Menu items
  - Labels
  - SSRS reports
  - Dynamics AX Model project
  - Security Privilege

What makes a good design

- Knowing where the data comes from
  - Table/Fields
  - Form/Control paths
- A good example layout
  - You can use Excel to mimic the layout.
- Where should the report live? (menu location)
- What parameters are needed?
  - What defaulting should take place on the parameter form?
- Security
- "Header values" aka Labels

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How long will this take?

- From a Stoneridge perspective, we usually estimate simple reports between 20-30 hours
- With complexity comes time and expense
  - Dimensions
  - Multiple designs
  - Header/lines/footer (think Sales Order, etc.)
  - Form reports (1099s, checks)
  - Data needed from multiple data sources (tables)
- It's not uncommon for a report to take 1-2 weeks to complete.

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SSRS Report pieces

- Data provider class (DP) – This supplies the data to the report

- Contract class – Parameters for the report

- Controller – Runs the report

- Temp table – Holds the data for the report

- SSRS report – The report design

- Visual studio project

- Menu item – To be able to run the report from the UI

- Privilege – To secure down the Menu item

Questions?

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