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20-Steps to a Perfect Report
Reporting Services Process (rev 2)
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1. Question the customer: ex. "What do you want to use this report for?" "What is the main idea behind this report?"
2. Brainstorm with the customer what they want displayed on the report.
3. Deliver draft #1 of the design of the report with the display/calculation rules using an Excel file to model the report. Work with customer until the model is approved.
4. Have the customer show you where the data originates such as:
   a. other pages/screens in the system
   b. Database schema
   c. Excel template
   d. Etc.
5. Estimate the time it will take to complete the Reporting Process based on the Reporting Phase Time Calculator. Discuss with the customer and come to an agreement.
6. Locate Database fields that are necessary for display on the report.
7. Write the SQL query.
8. Complete the calculations, functions, stored procedures, etc.
9. Mold the report design to match the Excel model (step 3)
10. Run the report through all necessary test phases and scenarios:
    For a Date parameter:
    a. Run for One Day
    b. Run for One Week
    c. Run for One Month
    For each additional parameter:
    a. Run with a simple parameter (such as a simple invoice, etc)
    b. Run with a complex parameter (such as a complex invoice, etc)
    c. Check the outlay, data, calculations, and totals on the report.
11. When tests are successful, save the report as Draft_(name)_X, where (name) is the name of the report and X is the number of the draft (for the first draft, X = 1). Upload this draft to the Draft folder on the customer's Reporting Services website.
12. Distribute individual Internal Pentad Report Review Form to each report stakeholder. Have each person use the report, provide feedback in writing, sign, and return the Pentad Report Review Form.
13. Review the Pentad Report Review Forms. Make any adjustments needed on the report. Save as another draft (for the second draft, X = 2) and upload to the Reporting Services website. If there are minor repairs to the report, test for yourself that the changes have been made. Complete any report adjustments and repeat step 10.
14. When the report looks good internally, arrange a WebEx meeting with the customer. Browse to the "final" draft in the customer's Draft folder on their Reporting Services website. Let the customer run the report themselves and give verbal feedback. Take notes.

15. When the WebEx is complete, make any adjustments to the report and save as another draft. Use the testing process again (step 10) if there are report adjustments.
16. Set up another WebEx meeting with the customer and go over any changes made. Have the customer give verbal feedback. Take notes.
17. Repeat steps 14 through 16 until the customer DECLARES the report is final.
18. When the customer has approved a DRAFT, move the report to the final Live portion of the SQL Reporting Services website. Remove the DRAFT and the number (X) from the report name.
19. Move all other drafts to the Hidden Folder on the SQL Reporting Services website.
20. Begin process for next report.