

Capita



Crystal to SSRS Conversion Work Package

Professional Services

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Introduction

Conversion of Crystal reports to SSRS reports to allow for better presentation, more flexibility and dynamic parameters. Linked reports can also be converted, and steps are provided on how to embed the report.

Benefits

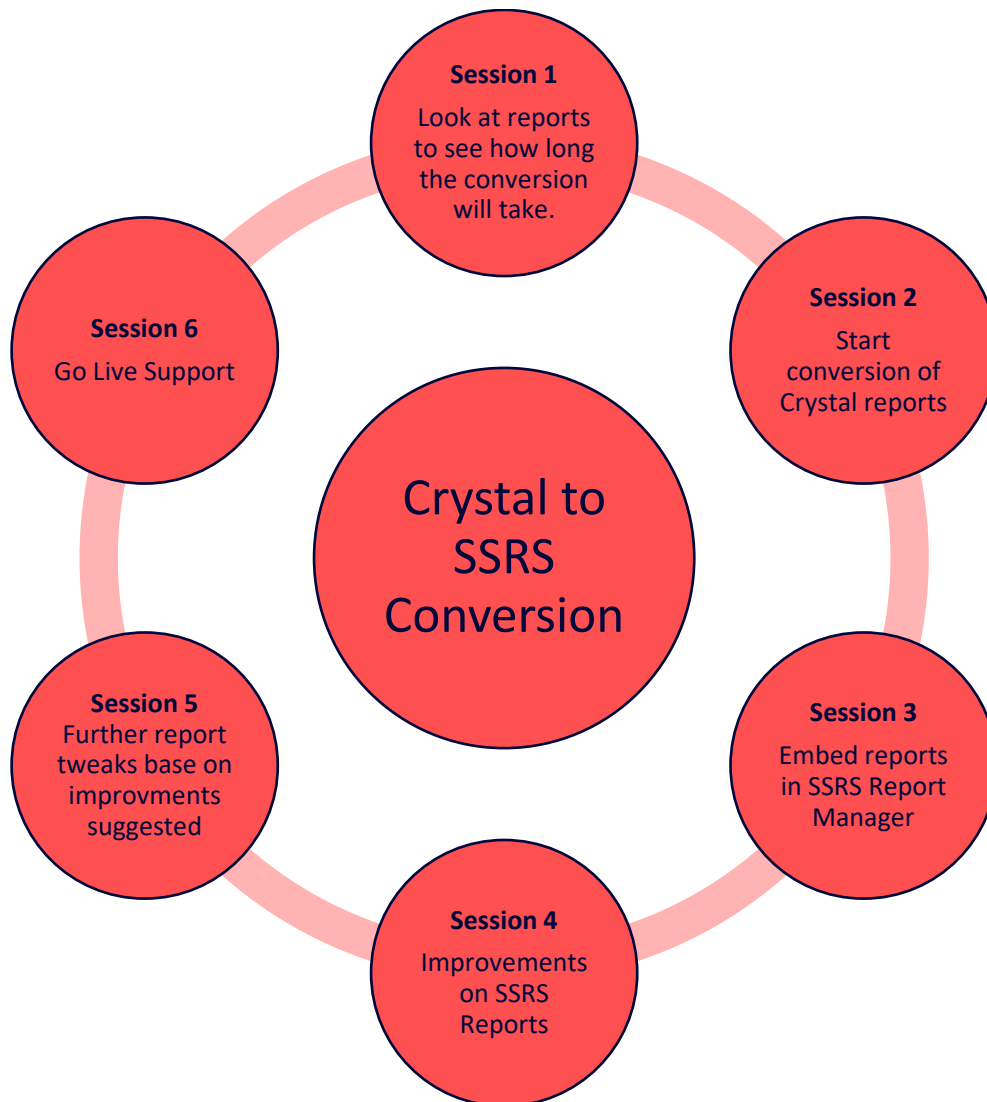
- We will convert the reports for you, giving you time to focus on day-to-day work.
- Static Parameters in reports can be converted to Dynamic Parameters, thus reducing the need for maintenance of the report.
- Whilst converting the report we will also offer advice on how to future the report, so it does not need updating each year e.g. changing of Admission dates etc.
- SSRS has better monitoring of when and who runs reports
- By converting your reports to SSRS you can take advantage of automated scheduling, monitor runtime.
- Many teams know SSRS so report writing can be shared out to a wider team
- SSRS reports can provide custom outputs dependent on the user logged in running the report.
- Good housekeeping exercise as it will give you the chance to review which reports are required.

Pre - requisites

SSRS needs to be setup in One v4 Client

Service Overview

Capita Children's Services will convert your existing Crystal reports to SSRS reports after a review of the Crystal report.



Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

Service Details

Session 1 - Scoping (Remote)

Key Prerequisites

- SSRS has been setup and works
- Access to Report Manager in V4 Client
- Access to One Online (Back Office)
- Current working Crystal reports

Objectives

- Provided approximate timescale for conversions

Audience

- Crystal report owner

Standard Agenda

- Obtain Crystal reports that require converting
- Check no custom created views or tables are used
- View the report to see tables, formulas, running totals and sub-reports used
- Run the report with set parameters and save output.

Outcomes

- Timescale given for conversion of each report

Session 2 - Conversion (Remote)

Objectives

- Convert reports

Standard Agenda

- Convert reports off site, no need for customer interaction

- Run reports using set parameters and check output matches the Crystal output. Access to V4 Client Report Manager needed.
- Look at areas where the report can be improved

Outcomes

- Converted reports
- Suggestions on how the report can be improved

Session 3 – Testing (Remote)

Objectives

- Make reports available to users

Audience

- Crystal report owner

Standard Agenda

- Add reports to appropriate folders
- Setup linked reports (if Required)

Outcomes

- Set of reports available for users to run

Session 4 – Improvements Scoping - If Required (Remote)

Objectives

- Add improvements suggested from Session 2

Audience

- Crystal report owner

Standard Agenda

- Add improvements suggested from Session 3

- Test report output matches Crystal report output

Outcomes

- Improved future proof SSRS reports

Session 5 – Enhancements - If Required (Remote)

Objectives

- Add enhancements to the SSRS report on top of what the Crystal report already outputs

Audience

- Crystal report users

Standard Agenda

- Add enhancements and additions to the newly created SSRS report above what Crystal provided

Outcomes

- Enhanced SSRS report

Session 6 – Go Live (Remote)

Key Prerequisites (full list provided in RAID log)

- SSRS has been setup and works
- Access to V4 Client and online (if required)

Objectives

- Test usability
- Running linked reports

Audience

- Report user

Standard Agenda

- Where to run the SSRS reports from

- How to run linked SSRS reports in Online modules

Outcomes

- Users confident in running reports.