***Contact Center Operations***

CCO eCoaching

SSRS Reports Implementation Run Book

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| Version # | 7.0 |
| *TFS #* | TFS 13333 – Reporting changes for Quality Now |
| *Description* | See overview below. |

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##### Revision History

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| Date | Change Description | Author |
| 4/26/2017 | Initial documentation – TFS 5621 | Susmitha Palacherla |
| 8/16/2017 | Upgrade to SQL Server 2012 – TFS 7106 | Susmitha Palacherla |
| 01/31/2017 | Data Encryption – TFS 7856 | Susmitha Palacherla |
| 08/27/2018 | Move to Shared Service Domain – TFS 11663 | Susmitha Palacherla |
| 02/11/2019 | Move to AD Domain – TFS 13389 | Susmitha Palacherla |
| 03/08/2019 | Change label for Module to Employee Level - TFS 13643 | Susmitha Palacherla |
| 04/04/2019 | TFS 13333 – Reporting changes for Quality Now | Susmitha Palacherla |
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| Overview |

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| Purpose: | The purpose of this run book is to provide a documented process and instruction on how authorized CCO Engineers should implement GDIT-developed changes in a new environment. |
| Change Summary: | **eCoaching SSRS Reports version 7.0:**  Enhancements: Added new Report for Quality Now  Bug fixes: N/A |
| Dependencies: | You will need to know which environment you are deploying to (Dev, SysTest, LoadTest, or Production). |
| Affected Servers and Databases: | Dev - f3420-ecldbd01 [eCoachingDev]  SysTest - f3420-ecldbt01 [eCoachingTest]  LoadTest - f3420-ecldbp01 [eCoachingLoadTest]  Production – f3420-ecldbp01 [eCoaching] |
| Reporting URLs: | **Development:**  <https://f3420-ecldbd01/Reports_ECLD01/>  **System Test:**  <https://f3420-ecldbt01/Reports_ECLT01/>  **Load Test:**  <https://f3420-ecldbp01/Reports_ECLP01/>  **Production**:  <https://f3420-ecldbp01/Reports_ECLP01/> |
| Web Service URLs: | **Development:**  <https://F3420-ECLDBD01/ReportServer>  **System Test:**  <https://F3420-ECLDBT01/ReportServer>  **Load Test:**  <https://F3420-ECLDBP01/ReportServer>  **Production**:  <https://F3420-ECLDBP01/ReportServer> |
| Security Impact: | None |
| Access Level Needed: | Implementer needs appropriate access to the web and database environments listed above. |

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| Implementation Steps – Supporting DB Objects |

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| Purpose/Scope: | This process describes the steps taken to implement the supporting DB objects for the current version changes. |
| Responsibility: | CCO Engineering |
| Code files: | Database changes implemented as part of **CCO\_eCoaching\_Log\_DB\_Runbook.docx** |
| Step 1: | NA |
| Step 2: | NA |
| Post-conditions: | NA |

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| Verification of Implementation – Supporting DB Objects |

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| Purpose/Scope: | This process describes the steps taken to initially verify or confirm the success of the implementation of the changes. |
| Responsibility: | <Who is responsible for this verification?> |
| References / forms/ documents: | <List any external form / document references here (full paths)> |
| Procedure [TEST 1] |  |
| Step 1: | In the SSMS window pointing to the target database for migration environment verify that the following objects show the TFS number related to this implementation in the Revision history.   * Tables   + N/A * Stored Procedures   + N/A      * Functions   + N/A |

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| Implementation Steps - SSRS Reporting |

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| Purpose/Scope: | This process describes the steps taken to implement the current version changes. |
| Responsibility: | CCO Engineering |
| Files to download from TFS: | Download all files under  \eCoaching\_V2\Code\SSRS\eCoachingReport\eCoachingReport\  to your local machine  \*Download latest version |
| Preconditions: | Database servers must have SSRS set up and ready for use. Reporting website for eCoaching must already be set up. Also, make sure you have Visual Studio installed with the “SQL Server Reporting Services” module installed.    The following IDE Works:  Microsoft Visual Studio Tools for Applications 2015 |
| Procedure |  |
| Step 1: | Navigate to the SSRS Website with your deployment credentials.  <https://f3420-ecldbp01/Reports_ECLP01/> |
| Step 2: | If there already is a folder present for the environment you are deploying to, (Development, System Test, Load Test, or Production), remove it. |
| Step 3: | Open the eCoachingReport.sln solution file from the code downloaded earlier in Visual Studio with your deployment credentials. You will need to run Visual Studio as the user with which you have permissions to deploy. Check to make sure that the eCoachingReport.rptproj project loaded successfully. |
| Step 4: | In the Solutions Configuration dropdown in Visual Studio, select the solution configuration that matches your desired target environment.   |  |  | | --- | --- | | **Target Environment** | **Solution Configuration** | | Development | Dev | | System Test | SysTest | | Load Test | LoadTest | | Production | Production | |
| Step 5: | Double click eCoaching.rds in Shared Data Sources in the solution explorer in Visual Studio. The following screen will come up.    Replace the connection string in the Connection String textbox with the connection string for the environment to which you are deploying (see table below), then click OK.   |  |  | | --- | --- | | **Target Environment** | **Solution Configuration** | | Dev | Data Source= f3420-ecldbd01;Initial Catalog=eCoachingDev | | SysTest | Data Source= f3420-ecldbt01;Initial Catalog=eCoachingTest | | LoadTest | Data Source= f3420-ecldbp01;Initial Catalog=eCoachingLoadTest | | Production | Data Source= f3420-ecldbp01;Initial Catalog=eCoaching | |  |  | |
| Step6: | Right-click the report project, and then click **Properties**  In the **Property Pages** dialog box for the project, select the configuration for the required deployment environment from the drop down (Dev/SysTest/LoadTest/Production) and verify the settings.   |  | | --- | | **Target Environment - Deployment Configuration** | | Dev | | |  |  | | --- | --- | | **Overwrite Datasets** | True | | **Overwrite DataSources** | False | | **TargetDatasetFolder** | /eCoaching/Datasets | | **TargetDataSourceFolder** | /eCoaching/DataSources | | **TargetReportFolder** | /eCoaching/Reports | | **TargetReportPartFolder** | Report Parts | | **TargetServerURL** | https://f3420-ecldbd01/ReportServer | | **TargetServerVersion** | SQL Server 2008 R2, 2012 or 2014 | | **Report Portal** | https://f3420-ecldbd01/Reports\_ECLD01 | | |  | | SysTest | | |  |  | | --- | --- | | **Overwrite Datasets** | True | | **Overwrite DataSources** | False | | **TargetDatasetFolder** | /eCoaching/Datasets | | **TargetDataSourceFolder** | /eCoaching/DataSources | | **TargetReportFolder** | /eCoaching/Reports | | **TargetReportPartFolder** | Report Parts | | **TargetServerURL** | https://f3420-ecldbt01/ReportServer | | **TargetServerVersion** | SQL Server 2008 R2, 2012 or 2014 | | **Report Portal** | https://f3420-ecldbt01/Reports\_ECLT01 | | |  | | LoadTest | | |  |  | | --- | --- | | **Overwrite Datasets** | True | | **Overwrite DataSources** | False | | **TargetDatasetFolder** | /eCoaching/LoadTest/Datasets | | **TargetDataSourceFolder** | /eCoaching/LoadTest/DataSources | | **TargetReportFolder** | /eCoaching/LoadTest/Reports | | **TargetReportPartFolder** | Report Parts | | **TargetServerURL** | https://f3420-ecldbp01/ReportServer | | **TargetServerVersion** | SQL Server 2008 R2, 2012 or 2014 | | **Report Portal** | https://f3420-ecldbp01/Reports\_ECLP01 | | |  | | Production | | |  |  | | --- | --- | | **Overwrite Datasets** | True | | **Overwrite DataSources** | False | | **TargetDatasetFolder** | /eCoaching/Production/Datasets | | **TargetDataSourceFolder** | /eCoaching/Production/DataSources | | **TargetReportFolder** | /eCoaching/Production/Reports | | **TargetReportPartFolder** | Report Parts | | **TargetServerURL** | https://f3420-ecldbp01/ReportServer | | **TargetServerVersion** | SQL Server 2008 R2, 2012 or 2014 | | **Report Portal** | https://f3420-ecldbp01/Reports\_ECLP01 | | |
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| Step 7: | In the build menu, select “Deploy Solution”. The project will build and deploy. Note that if you are using a newer version of Visual Studio, there may be an error related to what feature sets are supported in SSRS 2012. Building again should resolve this issue.  cid:image007.png@01D21D61.D1437D20 |
| Step 8: | If the eCoaching.rds file from step 5 is checked out (has a red check next to it instead of a blue lock), right click the file and “Undo Pending Changes”. |
| Post-conditions: | None |

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| Verification of Implementation - SSRS Reporting |

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| Purpose/Scope: | This process describes the steps taken to initially verify or confirm the success of the implementation of the changes. |
| Responsibility: | <Who is responsible for this verification?> |
| References / forms/ documents: | <List any external form / document references here (full paths)> |
| Procedure [TEST 1] |  |
| Step 1: | On the SSRS Website page, check that the folders were created by the deployment process. Under the folder named for your deployment environment, the following structure should exist:   * Datasets   + AdminActionList.rsd   + AdminFormList.rsd   + AdminLogTypeList.rsd   + CoachingEmployeeList.rsd   + CoachingReasonList.rsd   + CoachingSiteList.rsd   + CoachingStatusList.rsd   + CoachingSubReasonList.rsd   + HierarchyEmployeeList.rsd   + HierarchySiteList.rsd   + ModuleList.rsd   + WarningActiveList.rsd   + WarningEmployeeList.rsd   + WarningReasonList.rsd   + WarningSiteList.rsd   + WarningStatusList.rsd   + WarningSubReasonList.rsdDataSources * Reports   + AdminActivitySummary.rdl   + CoachingSummary.rdl   + HierarchySummary.rdl   + WarningSummary.rdl |
| Procedure [TEST 2] |  |
| Step 1: | Open the eCoaching Admin application. From the Reporting menu, select one of the reports. |
| Step 2: | In the page that opens, you should see report parameters in the report viewer in the page. |

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| Important Notes |

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| Purpose/Scope: | This section lists any other items of note for the implementation. |
| Note 1: | Steps for section ‘Implementation Steps – Supporting DB Objects’ will be implemented as part of the database implementation main runbook. This Implementation should take place after the Database Implementation for TFS 7856. This SSRS Implementation starts at section ‘Implementation Steps - SSRS Reporting’. |
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