***Contact Center Operations***

CCO eCoaching

SSRS Reports Implementation Run Book

|  |  |
| --- | --- |
| Version # | 2.0 |
| *TFS #* | Upgrade to SQL Server 2012. TFS 7106  New servers and Reporting sites. |
| *Description* | See overview below. |

##### Contents

[Overview 1](#_Toc480967414)

[Implementation Steps – Supporting DB Objects 2](#_Toc480967415)

[Verification of Implementation – Supporting DB Objects 3](#_Toc480967416)

[Implementation Steps - SSRS Reporting 3](#_Toc480967417)

[Verification of Implementation - SSRS Reporting 7](#_Toc480967418)

[Important Notes 9](#_Toc480967419)

##### Revision History

|  |  |  |
| --- | --- | --- |
| 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 |
|  |  |  |
|  |  |  |
|  |  |  |

|  |
| --- |
| Overview |

|  |  |
| --- | --- |
| 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 2.0:**  Enhancements: Upgrade to SQL Server 2012  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:** <http://f3420-ecldbd01/Reports_ECLD01/>  **System Test:** <http://f3420-ecldbt01/Reports_ECLT01/>  **Load Test:**  <http://f3420-ecldbp01/Reports_ECLP01/>  **Production**: [http://f3420-ecldbp01/Reports\_ECLP01/](http://f3420-ecldbt01/Reports_ECLT01/) |
| Web Service URLs: | **Development:** <http://F3420-ECLDBD01/ReportServer>  **System Test:** <http://F3420-ECLDBT01/ReportServer>  **Load Test:**  <http://F3420-ECLDBP01/ReportServer>  **Production**: [http://F3420-ECLDBP01/ReportServer](http://f3420-ecldbt01/Reports_ECLT01/) |
| Security Impact: | None |
| Access Level Needed: | Implementer needs appropriate access to the web and database environments listed above. |

|  |
| --- |
| Implementation Steps – Supporting DB Objects |

|  |  |
| --- | --- |
| Purpose/Scope: | This process describes the steps taken to implement the supporting DB objects for the current version changes. |
| Responsibility: | CCO Engineering |
| Code files: | \eCoaching\_V2\Code\DB\Stored Procedures\sp\_rptCoachingSummary.sql (Change set 38424) |
| Step 1: | Open SQL Server Management Studio and log in with account with rights to environment migrating to.  Refer to Affected servers and databases list in Overview section |
| Step 2: | Get Stored Procedure listed under Code Files and execute it in ssms window pointing to target environment with nothing selected. |
| Post-conditions: | None |

|  |
| --- |
| Verification of Implementation – Supporting DB Objects |

|  |  |
| --- | --- |
| 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   PROCEDURE [EC].[sp\_rptCoachingSummary] - (TFS 7106)     * Functions   + N/A |

|  |
| --- |
| Implementation Steps - SSRS Reporting |

|  |  |
| --- | --- |
| 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 |
| 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.  cid:image001.png@01D21D61.5B5C1400  The following combination of packages will work:   |  |  | | --- | --- | | Package Name | URL | | Visual Studio 2013 Isolated Shell | http://www.microsoft.com/en-us/download/details.aspx?id=40764 | | Visual Studio 2103 Integrated Shell | http://www.microsoft.com/en-us/download/details.aspx?id=40777 | | Microsoft SQL Server Data Tools - Business Intelligence | https://www.microsoft.com/en-us/download/details.aspx?id=42313 | |
| Procedure |  |
| Step 1: | Navigate to the SSRS Website with your deployment credentials. |
| 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 | |  | |  | | SysTest | |  | |  | | LoadTest | |  | |  | | Production | |  | |
| 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 |

|  |
| --- |
| Verification of Implementation - SSRS Reporting |

|  |  |
| --- | --- |
| 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. |

|  |
| --- |
| Important Notes |

|  |  |
| --- | --- |
| Purpose/Scope: | This section lists any other items of note for the implementation. |
| Note 1: | First Implement the section ‘Implementation Steps – Supporting DB Objects’. Then go to the Report implementation. |
| Note 2: | TFS ticket 7643 to support Reporting infrastructure must be implemented to view the Reports in the Admin Tool application. |
|  |  |