

SSRS Managing Customized Reports (BP0007)

Introduction

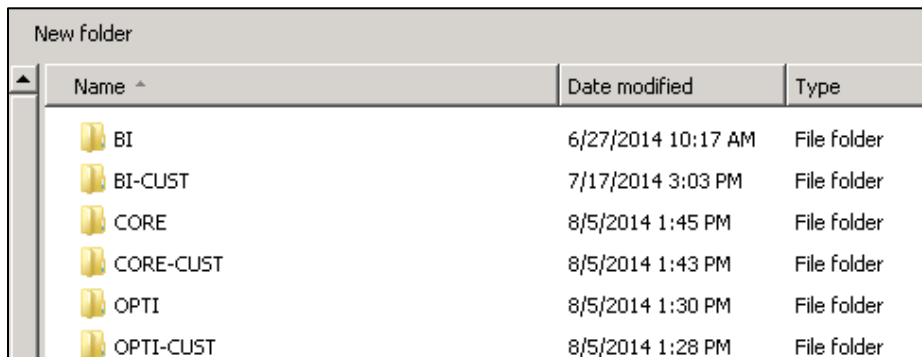
This procedure is intended to clarify the management of RDL reports customized by FeneTech and users. After each update, a series of standard reports are modified and upgraded to match the new structure of the database. The goal is not to overwrite customization made by users with a base report.

Reports

Presently, the reports are organized in these folders & SSRS projects:

- **BI**
- **CORE**
- **OPTI**
- **WEB**

When FeneTech modifies a base FeneVision report, copy the report in a new folder called **<NameOfOriginalProject>-CUST**. In this new project, the DataSource and target folder must be the same as the original base project (see 'Creating a Custom Report Project' section for more information). Once the report has been copied, the name should not be changed. Once deployed, the customized report for the user is going to be executed instead of the standard FeneVision report.



Name ^	Date modified	Type
BI	6/27/2014 10:17 AM	File folder
BI-CUST	7/17/2014 3:03 PM	File folder
CORE	8/5/2014 1:45 PM	File folder
CORE-CUST	8/5/2014 1:43 PM	File folder
OPTI	8/5/2014 1:30 PM	File folder
OPTI-CUST	8/5/2014 1:28 PM	File folder

The original report should not be moved so that it can be traced back. However, do exclude the base report from the base *project*, to avoid someone entering the base project, editing the report, deploying it and overwriting the custom report in SSRS.

When updating, FeneTech will delete all deployed reports and replace the standard base reports with the new ones, then deploy the -CUST reports.

When users to modify a base FeneVision report, they should copy the report to a new folder and project called **<NameOfOriginalProject> -<ABC>** where ABC is the user's 3 letter company code.

**Separate folders for user created reports help determine who is responsible for reports during an upgrade.*

In this new project, the DataSource and target folder must be the same as the original base project (see 'Creating a Custom Report Project' section for more information). Once the report has been copied, the name should not be changed. Once deployed, the customized report from the customer is going to be executed instead of the standard FeneVision report.

- **BI**
- **BI-CUST**
- **BI-CUST-ABC**

The original report should not be moved so that it can be traced back. However, do exclude the base report from the base *project*, to avoid someone entering the base project, editing the report, deploying it and overwriting the custom report in SSRS.

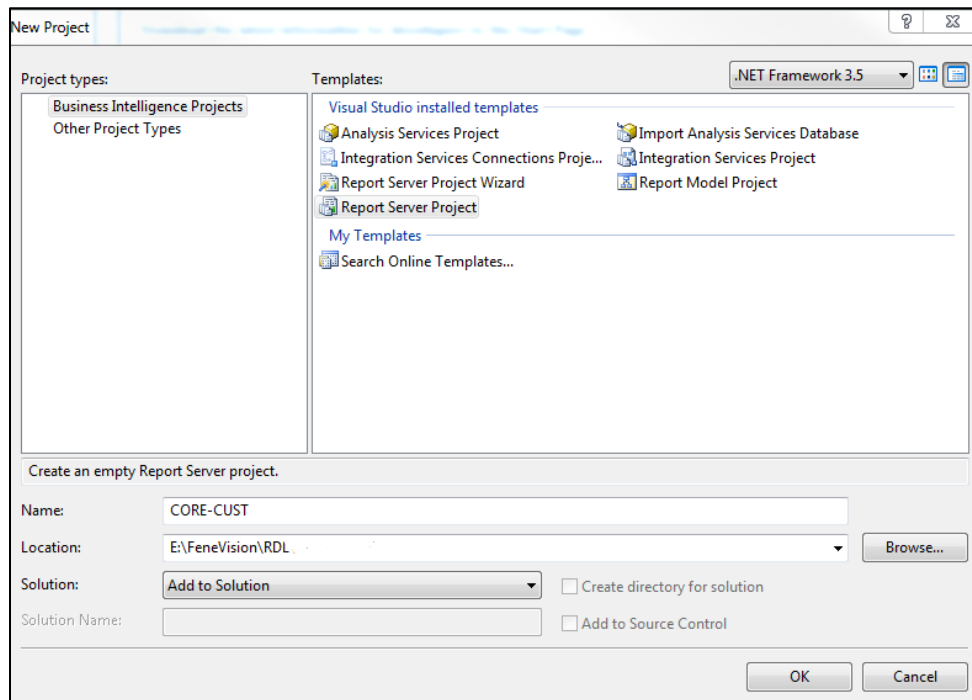
When upgrading, the user will then have to update their own customized reports and deploy them.

When users create a new report in the <ABC> area, they should use a company prefix in the rdl file name.

Creating a Custom Report Project

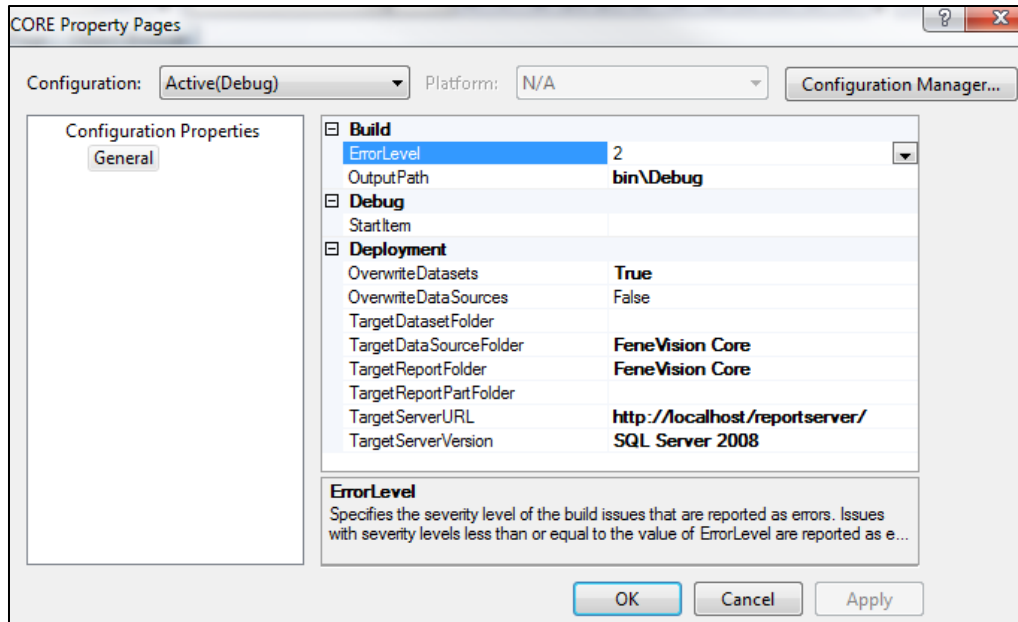
Custom reports are typically the responsibility of users at upgrade time, as are their customized base reports. Users should to keep a log of changes made to FeneVision base reports so that changes can be merged into new base reports during the upgrade process.

1. Create Custom Project
 - a. Open FeneVision CORE solution
 - b. File->New Project
 - I. Business Intelligence Projects, Report Server Project
 - II. Select 'Add to Solution'.
 - III. Name: CORE-CUST
 - IV. Location: *drive*:\FeneVision\RDL\.
 - V. Click 'OK'. The new project is in CORE-CUST in 'Solution Explorer'.



- c. Add Datasource
 - i. In Right click on Shared Data Sources and select Add New Data Source
 - ii. Enter connection information (same as in base project)
 - iii. Click OK

- d. Folder Settings
 - i. Right click on CORE-CUST in Solution Explorer.
 - ii. Select properties.
 - iii. Make sure the CORE-CUST properties match the CORE properties, as shown below.



2. Move a FeneVision report from CORE project to CORE-CUST for customization.
 - a. Drag report from CORE project to Reports folder underneath CORE-CUST project in solution explorer. This leaves original source.rdl file in the original hadr drive folder for reference, but excludes the report from the base project as desired.
 - b. Copy from base folder to cust folder on the hard drive. Make sure you exclude report from the base project when using this method. The original source.rdl file can be left in the original folder for reference.