Moving a Report from Test to Production

Cavallo Support - 2024-11-22 - Reporting

Security

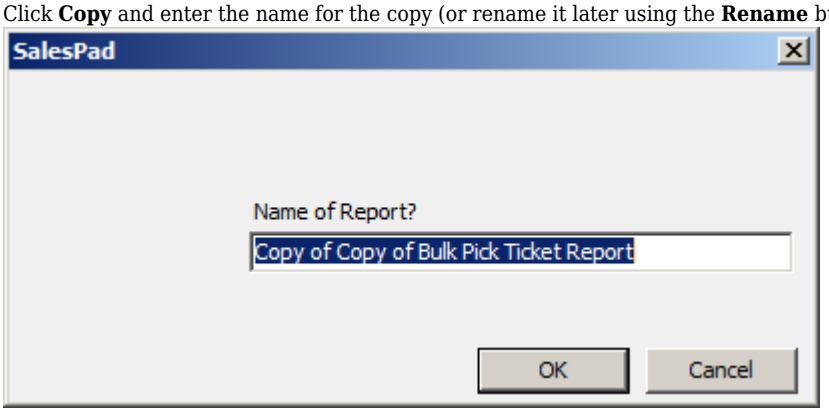
Report Manager must be enabled in the Security Editor in order to access the Report Designer, which is required to move the report from Test to Production.

Print Report must be enabled in the Security Editor to allow users to print reports (to enable report editing, its sub-setting *Admin Mode* should be set to True). To access a report from the Print dialog, you must first add the name of the report to the proper sub-setting (Invoice, Order, Quote, or Return). All other existing reports will be hidden. A blank field gives access to all reports for that document type.

Unless the field is left blank, new reports and copies of reports edited in the Report Manager will not be visible until you add access in the Security Editor.

Steps for Moving a Report from Test to Production:

1. In the TEST database, open the report in the Report Designer (Modules > Report Manager > (select the report) > Design)
2. Save it with a different name using File > Save As. The file extension will be .repx
3. Open Report Manager in your PRODUCTION environment and select the desired report
4. Click **Copy** and enter the name for the copy (or rename it later using the **Rename** button).



5. Click **OK**
6. Click **Design** to open the new copy in the Report Designer
7. Go to File > Save As and save the file with the same name given to the report in Report Manager
8. Close the Report Designer
9. Open the TEST .repx file and copy its contents to the PRODUCTION COPY .repx file
10. Open the PRODUCTION COPY file in the Report Designer. It should now contain the TEST report

Note: If your reports use existing fields, there should be no database issues. If you have a report that requires changing the db (spcpSalesDocumentReport), you would have to make the db changes before copying the report over. This ensures that the elements of the report that rely on the db alterations are not lost. If you encounter disappearing fields after moving a report, the most likely cause is forgetting to make db changes before transferring over.