Deltek Vision®

Microsoft SQL Server® Reporting Services 2008 Issues and Vision 6 Reports

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Overview

Deltek Vision 6 uses Microsoft SQL Server® Reporting Services (SSRS) 2008 as the core reporting engine for both standard and custom reports. This is a significant technology shift from the Vision 5 Actuate-based platform. Because of this technology shift, there are functionality differences between reports in the two Vision versions. This document describes some of the reporting differences that you may experience in Vision 6.0 and later.

Issues with SSRS 2008 and Vision Reports

Column Headings Do Not Repeat on a New Page

Text boxes (such as comment fields) that wrap to a new page of a report cause the column headings to not repeat on the new page. This affects Vision Accounts Receivable reports and any custom report that you create with text boxes.

There is no workaround for this issue.

Deltek has an open case with Microsoft, requesting that the column headings be repeated on the next page.

Custom Reports

For controls such as subreports and text boxes that now support a KeepTogether property in SSRS 2008 (they did not support a KeepTogether property in SSRS 2005), the KeepTogether property default setting is True (to match the functionality of SSRS 2005).

When a text box has a large amount of text (such as for a comment), the entire text block breaks and starts on the next page if it will not fit on the current page. This can produce a large white space at the end of a page where you placed a text box. To prevent large white space on pages where comment fields (text boxes) are placed and to allow text box text to start on one page and continue to the next page, you must change the KeepTogether property to False in the report RDL file. However, the column (text box) headings are not repeated on the next page.

Invoices Have Unexpected White Space

On all Vision reports, you may see white space at the bottom of a page, above the page footer. This white space is equal to the size of the second page header (the information above the top page heading line that shows report name, date, and time).

There is no workaround for this issue.

Deltek has an open case with Microsoft, requesting the removal of the white space.

Technical information

All of Vision's reports have a first page heading and another heading for pages two and beyond. This is accomplished by putting the first page heading in the body of the report while hiding the actual page header on the first page.

With SSRS 2005, you would see white space equal to the size of the page header on the first page. Even though the page header was invisible, white space remained. This becomes more obvious on the invoice, especially in cases where the top margin is large (possibly to fit a custom image).

With SSRS 2008, the same issue exists, but the page heading white space shows at the bottom of the first page instead of the top. This means you can have white space at the bottom of the first page that causes a blank second page.

Report Fails Due to Multiple Table Rows in a Group

A report fails if it has more than one table row in a group (detail or group), and a ReportItems!field.Value reference is made from one row to another row in the same scope. This is a known issue with SSRS 2008.

There are two ways to set up expressions for text boxes in reports:

- Reference a query column: Fields!Column.Value
- Reference another text box: ReportItems!TextBoxName.Value

If you have a report with more than one table row for a group or for the detail of the report, and you try to reference a text box from a different row, you receive an error.

Example

Table	TextboxName	Expression Value
DetailRow1	TextBox1	Fields!Column.Value
DetailRow2	TextBox2	ReportItems!TextBox1.Value

TextBox2 returns an error when loading the report.

This is not common. Deltek has made efforts to avoid using this technique in all standard reports due to the SSRS 2008 limitation. This was not an issue with SSRS 2005.

Report Preview Searching—Not All Text Boxes Are Available

When you preview Vision reports, you cannot search on the following:

- Fields from subreports
- Fields that are in table headers. Because some reports use nested tables with actual data in table headings, some fields in a report do not display in the list of available fields.

Namespace Tag Displays on Reports with Rich Text Format Memo Fields

When you copy text from Microsoft Word into one of Vision's memo fields, the text may have a namespace tag that SSRS 2008 does not know how to handle. In these cases, you see the following displayed on a report that contains the memo field:

```
<?xml:namespace prefix = o ns = "urn:schemas-microsoft-com:office:office" />
```

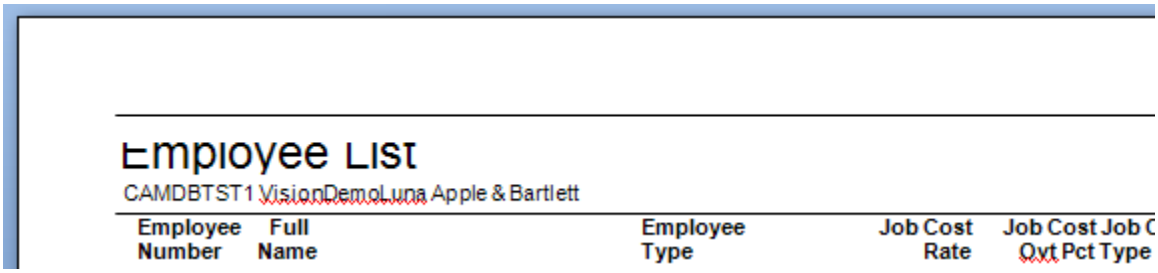
To prevent this, do not copy and paste or cut and paste directly from Word into Vision memo fields.

Additional Technical Information

When rich text is copied from Word into Vision Memo fields, if the text contains HTML code (any formatted text, colors, different font, size, and so on), it cannot format some HTML tags.

Report Name Is Cut Off

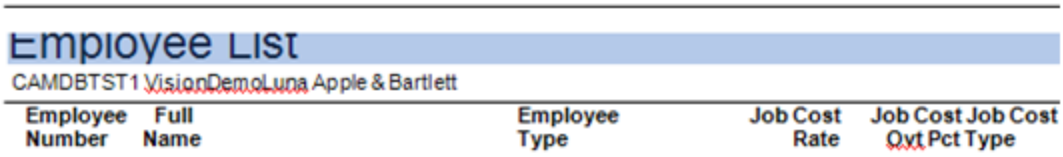
The top of the report name on a Vision report is cut off after you download the report to a Rich Text Format (RTF) file format as in the following Employee List example.



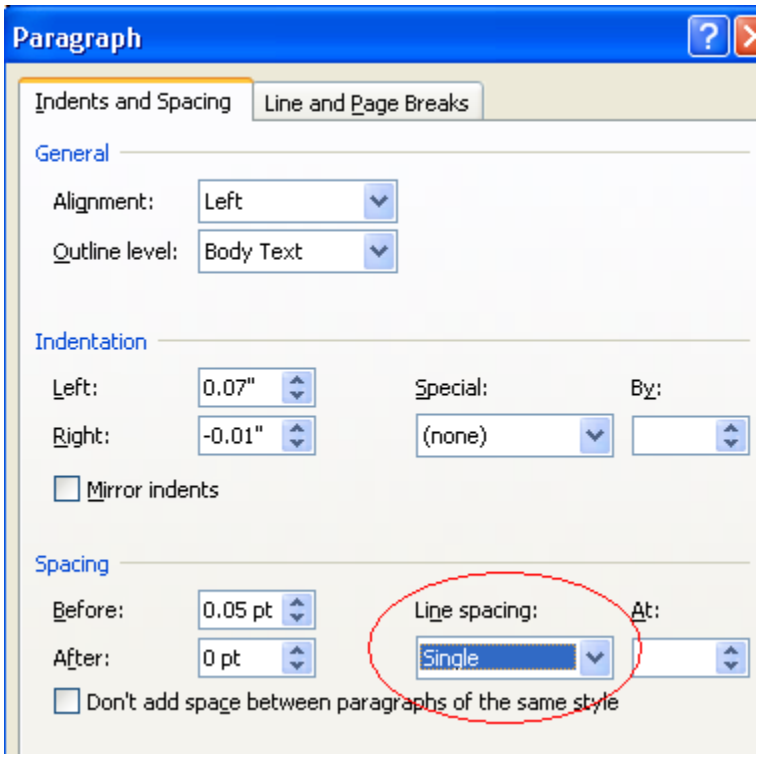
To work around this issue, you can make a slight change the top position of the date and time text boxes on the top right of the page.

Workaround steps for the following Employee List example:

1. Preview the report.
2. Highlight the report title line in the report,
3. Right click the report title line, and select **Paragraph** from the short-cut menu.



4. On the Indents and Spacing tab, select **Single** (instead of **Exactly**) in the **Line spacing** drop-down list.



Technical Information

This is an issue with the third party PDF to RTF converting process that converts text boxes to Microsoft Word. Because the report name uses a larger font and because there are two text boxes next to the report name for date and time, the report name gets cut off when the RTF rendering tries to line up the text on the first page.

Font Is Changed When Downloading to an RTF File Format

When you download a Vision report to a RTF file format, the conversion from PDF to Microsoft Word changes text with an Arial font to Helvetica (they are almost identical).

There is no workaround for this issue.

Downloading Reports

Deltek does not have complete control over how SQL Server Reporting Services reports (such as Vision invoices) are downloaded to Microsoft Word, RTF, Excel, and other file formats. Sometimes various report settings, margins, and so on can be changed to improve how a report downloads or make it download differently. Sometimes there is nothing that can be done to improve how a report downloads.

For reports such as invoices, you can use the Vision Invoice Template Editor to tweak margins and other various position settings to make sure fields do not overlap or run into each other. This often helps the downloaded reports as well.

Deltek has the following general recommendations for downloading reports:

- Use Microsoft Word 2007 instead of Microsoft Word 2003 to avoid some issues when you download reports to Word.
- Try each of the different file formats—Word, RTF, and Excel—to find one that best suits your needs. Generally, downloading to the RTF format tends to be the cleanest, but it is not completely without issues. Excel does not handle complex reports, such as Vision invoices, as well as RTF and Word.

Download to Microsoft Word Issues

Word 2007 Versus Word 2003

Deltek suggests that you use Word 2007 instead of Word 2003 to reduce potential SSRS issues that affect reports and invoices.

For example, with Word 2003, an invoice downloaded to Word could preview in Word fine, but it may wrap words and remove lines when you print it. This issue can be avoided by using Word 2007.

White Space

Downloading to Word causes white space issues for subreports, and sometimes it results in blank pages.

Technical information

The download to Word process uses a native SSRS renderer to convert report out to Word. This is done by converting report tables to tables in Word. We use tables for almost all of our column based reports. We have had some cases where a table for a subreport still starts on a new page (similar to the original white space issue that was attempting to keep sub reports together). The native Word renderer reserves one 11-point line for each subreport when it is downloaded.

There is a NoRows property for subreports that we set to an empty string (=””) as a workaround given to us from Microsoft to remove that 11-point blank line. You might notice that when the report is downloaded to Word, the 11-point lines of white space for each blank subreport close up after the report is opened in Word. It appears that if a subreport was initially pushed to a new page because of the 11-point space and if a sub report had been pushed to a new page because of that white space, it stays there.

Download to Microsoft Excel Issues

Numbers Are Converted to Text

When you download reports to Excel, numbers are converted to text. In Excel, if you want to use the numbers in calculations, you must reformat the text to numbers.

More White Space Between Lines

Downloading to Excel sometimes downloads rows with a greater height causing more white space between lines.

Images in Page Footers Are Omitted

When you download a report to Excel that has images in footers, the images are not downloaded into Excel. However, images in page headers are downloaded into Excel.

If you have images in footers, try the following solutions:

- Download to Word or RTF instead of Excel.
- Use text instead of an image in the footer.