

## OVERVIEW

Newmarket® International is committed to providing our customers with a flexible set of options to achieve their reporting goals. Newmarket provides a robust reporting and analytics platform based on the Microsoft Business Intelligence platform. Helping you select the most appropriate report training options requires an understanding of the skill sets of the your report writers, your reporting needs and Newmarket’s reporting training offerings.

This document is intended to provide an overview of the Microsoft SQL Server 2005 Reporting Services (SSRS) training options. The three reporting training options available through Newmarket International are:

- Report Builder 1.0 with the Newmarket Report Model
- Report Designer with the Newmarket Report Model
- Report Designer with Delphi Data Views

## DECISION POINTS

Choose the best answer to each question that matches your situation and review the reporting option(s) available to you. The answers to these questions, when evaluated together, will provide a clear list of your SSRS report training options.

### What Delphi product version do you have?

| PRODUCT                | Delphi 9.5.2 SP1 or higher   | Delphi 9.5 , 9.5.1, or 9.5.2  | Delphi 9.4.x or lower  |
|------------------------|--|---|--|
| SSRS REPORTING OPTIONS | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> <li><input type="checkbox"/> Report Designer with the Newmarket Report Model</li> <li><input type="checkbox"/> Report Designer with Delphi Data Views</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Designer with Delphi Data Views</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> No SSRS options</li> </ul> |

### What is the current reporting skill set of those who will be creating reports?

| SKILL SET              | Beginning Report Creator   | Intermediate Report Creator   | Advanced Report Creator  |
|------------------------|--|---|--|
|                        | <ul style="list-style-type: none"> <li><input type="checkbox"/> 0 to 1 years of Delphi experience</li> <li><input type="checkbox"/> 0 to 2 years of report writing experience</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> 1 to 2 years of Delphi experience</li> <li><input type="checkbox"/> 2 to 5 years of report writing experience</li> </ul>                        | <ul style="list-style-type: none"> <li><input type="checkbox"/> 3 plus years of Delphi experience</li> <li><input type="checkbox"/> 1 to 2 years NSA experience (CNSA preferred)</li> <li><input type="checkbox"/> 6 plus years of report writing experience</li> </ul>                  |
| SSRS REPORTING OPTIONS | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> </ul>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> <li><input type="checkbox"/> Report Designer with the Newmarket Report Model</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> <li><input type="checkbox"/> Report Designer with the Newmarket Report Model</li> <li><input type="checkbox"/> Report Designer with Delphi Data Views</li> </ul> |

What are your ad hoc reporting needs?

|                              |   |  |   |
|------------------------------|---|--|---|
| <b>REPORT SKILL</b>          | <ul style="list-style-type: none"> <li><input type="checkbox"/> Create account, contact, or booking lists</li> <li><input type="checkbox"/> Create booking revenue with simple subtotals and grand totals</li> <li><input type="checkbox"/> Create reports with simple filters and parameters</li> <li><input type="checkbox"/> Create simple expressions (i.e. Food + Beverage)</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> All items from previous column</li> <li><input type="checkbox"/> Create complex expressions (i.e. If/Then/Else expressions)</li> <li><input type="checkbox"/> Create parameters with values populated from the database</li> <li><input type="checkbox"/> Create revenue reports with multiple subtotals</li> <li><input type="checkbox"/> Create multiple groups</li> <li><input type="checkbox"/> Creator autonomy with report layout</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> All items from previous two columns</li> <li><input type="checkbox"/> Performance based reports</li> <li><input type="checkbox"/> Reports from multiple databases (not trained by Newmarket)</li> </ul> |
| <b>SSRS REPORTING OPTION</b> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Designer with the Newmarket Report Model</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Designer with Delphi Data Views</li> </ul>   |

**REPORT TRAINING OPTIONS COMPARISON CHART**

The following comparison chart summarizes the skill level of the report creator required and the skills taught for each SSRS option.

|  | Report Builder 1.0 with the Newmarket Report Model   | Report Designer with the Newmarket Report Model  | Report Designer with Delphi Data Views  |
|--|--|--|---|
| <b>Required Report Creator Skill Level</b> | Beginning Report Creator   | Intermediate Report Creator  | Advanced Report Creator   |
| <b>Training Days</b>                       | 1 day  | 4 days   | 5 days  |
| <b>Skills Learned</b>                      | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Manager Administration and Security</li> <li><input type="checkbox"/> Designing Reports</li> <li><input type="checkbox"/> Sorting Fields</li> <li><input type="checkbox"/> Formatting Fields</li> <li><input type="checkbox"/> Filtering of Data</li> <li><input type="checkbox"/> Creating Basic Parameters</li> <li><input type="checkbox"/> Creating Simple Expressions</li> <li><input type="checkbox"/> Automated Grouping of Data</li> <li><input type="checkbox"/> Adding Automated Subtotals/Grand Totals</li> <li><input type="checkbox"/> Running a report from the Report Manager</li> <li><input type="checkbox"/> Create a few reports to be able to use in your daily activities</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Manager Administration and Security</li> <li><input type="checkbox"/> Designing Reports</li> <li><input type="checkbox"/> Sorting Fields</li> <li><input type="checkbox"/> Formatting Fields</li> <li><input type="checkbox"/> Filtering Data</li> <li><input type="checkbox"/> Creating Complex Parameters</li> <li><input type="checkbox"/> Creating Complex Expressions</li> <li><input type="checkbox"/> Custom Grouping of Data</li> <li><input type="checkbox"/> Adding Custom Subtotals/Grand Totals</li> <li><input type="checkbox"/> Adding Drill-Downs</li> <li><input type="checkbox"/> Conditionally Formatting Fields</li> <li><input type="checkbox"/> Deploying Reports</li> <li><input type="checkbox"/> Scheduling Report Delivery</li> <li><input type="checkbox"/> Reporting on Consumed Dates</li> <li><input type="checkbox"/> Running a report from the Report Manager</li> <li><input type="checkbox"/> Report Builder 1.0 with the Newmarket Report Model</li> <li><input type="checkbox"/> Report creating strategy for the report requestor</li> <li><input type="checkbox"/> Create over two dozen reports to be able to use in your daily activities</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Report Manager Administration and Security</li> <li><input type="checkbox"/> Designing Reports</li> <li><input type="checkbox"/> Sorting Fields</li> <li><input type="checkbox"/> Formatting Fields</li> <li><input type="checkbox"/> Filtering Data</li> <li><input type="checkbox"/> Creating Complex Parameters</li> <li><input type="checkbox"/> Creating Complex Expressions</li> <li><input type="checkbox"/> Custom Grouping of Data</li> <li><input type="checkbox"/> Adding Custom Subtotals/Grand Totals</li> <li><input type="checkbox"/> Adding Drill-Downs</li> <li><input type="checkbox"/> Conditionally Formatting Fields</li> <li><input type="checkbox"/> Deploying Reports</li> <li><input type="checkbox"/> Scheduling Report Delivery</li> <li><input type="checkbox"/> Reporting on Consumed Dates</li> <li><input type="checkbox"/> Reporting on Performance Data</li> <li><input type="checkbox"/> Working with Data Views</li> <li><input type="checkbox"/> Joining Multiple Data Views</li> <li><input type="checkbox"/> Running a report from the Report Manager</li> <li><input type="checkbox"/> Report creating strategy for the report requestor</li> <li><input type="checkbox"/> Create over two dozen reports to be able to use in your daily activities</li> </ul> |

## TRAINING REPORTS

During training, students will have the opportunity to create many reports through the instructor-guided training sessions and the lab exercises. The lists of reports below are intended to give examples of the types of reports that students will create. Throughout the sessions, the trainer will evaluate the training progress and make adjustments to the report list as necessary.

| Product                          | Report Builder 1.0 with the Newmarket Report Model  | Report Designer with the Newmarket Report Model   | Report Designer with Delphi Data Views  |
|----------------------------------|---|---|---|
| <b>Instructor-Guided Reports</b> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Account Audit</li> <li><input type="checkbox"/> Account Creation</li> <li><input type="checkbox"/> Accounts by Sale Manager</li> <li><input type="checkbox"/> Bookings by Market Segment</li> <li><input type="checkbox"/> Contact Name and Address</li> <li><input type="checkbox"/> Quick Forecast</li> <li><input type="checkbox"/> Sales Manager Forecast</li> <li><input type="checkbox"/> Slippage</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Account Creation</li> <li><input type="checkbox"/> Account List</li> <li><input type="checkbox"/> Accounts by Sales Manager</li> <li><input type="checkbox"/> Booking Revenue Audit</li> <li><input type="checkbox"/> Consumed Date Forecast</li> <li><input type="checkbox"/> Daily Events</li> <li><input type="checkbox"/> Event List</li> <li><input type="checkbox"/> Future Definite Bookings</li> <li><input type="checkbox"/> Group Rooms Arrivals</li> <li><input type="checkbox"/> Guestrooms Booked</li> <li><input type="checkbox"/> Meal Type</li> <li><input type="checkbox"/> Monthly Actuals</li> <li><input type="checkbox"/> Monthly Function Room Forecast</li> <li><input type="checkbox"/> New Definites</li> <li><input type="checkbox"/> Quick Forecast</li> <li><input type="checkbox"/> Revenue by Market Segment</li> <li><input type="checkbox"/> Sales Manager Forecast</li> <li><input type="checkbox"/> SIC Code or Sales Manager</li> <li><input type="checkbox"/> Slippage</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Account Creation</li> <li><input type="checkbox"/> Account List</li> <li><input type="checkbox"/> Booking Revenue Audit</li> <li><input type="checkbox"/> Consumed Date Forecast</li> <li><input type="checkbox"/> Contact and Account Name</li> <li><input type="checkbox"/> Daily Events</li> <li><input type="checkbox"/> Event List</li> <li><input type="checkbox"/> Future Definite Bookings</li> <li><input type="checkbox"/> Guestroom Pace Report</li> <li><input type="checkbox"/> Guestrooms Booked</li> <li><input type="checkbox"/> Monthly Function Room Forecast</li> <li><input type="checkbox"/> New Definites</li> <li><input type="checkbox"/> Revenue by Market Segment</li> <li><input type="checkbox"/> SIC Code or Sales Manager</li> <li><input type="checkbox"/> Slippage</li> <li><input type="checkbox"/> Group Rooms Arrival</li> </ul> |
| <b>Lab Exercises</b>             | <ul style="list-style-type: none"> <li><input type="checkbox"/> BEOs Not Complete</li> <li><input type="checkbox"/> Blocked Rooms</li> <li><input type="checkbox"/> Bookings by Type</li> <li><input type="checkbox"/> Deposits Due</li> <li><input type="checkbox"/> Function Revenue Booking</li> <li><input type="checkbox"/> Future Commissions Payable</li> <li><input type="checkbox"/> Future Function Revenue by Market Segment</li> </ul>                                  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Actuals by Sales Manager</li> <li><input type="checkbox"/> BEOs Not Complete</li> <li><input type="checkbox"/> Blocked Room</li> <li><input type="checkbox"/> Bookings by Type</li> <li><input type="checkbox"/> Contact Name and Address</li> <li><input type="checkbox"/> Contacts in Your City</li> <li><input type="checkbox"/> Deposit Due</li> <li><input type="checkbox"/> Function Revenue Booking</li> <li><input type="checkbox"/> Function Revenue per Guestroom</li> <li><input type="checkbox"/> Future Commissions Payable</li> <li><input type="checkbox"/> Future Function Revenue by Market Segment</li> <li><input type="checkbox"/> Group Arrivals</li> <li><input type="checkbox"/> Guestroom Forecast by Manager</li> <li><input type="checkbox"/> Off-Site Catering</li> </ul>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Account Activity</li> <li><input type="checkbox"/> Account Summary</li> <li><input type="checkbox"/> Actuals by Sales Manager</li> <li><input type="checkbox"/> BEOs Not Complete</li> <li><input type="checkbox"/> Blocked Rooms</li> <li><input type="checkbox"/> Bookings by Type</li> <li><input type="checkbox"/> Catering Performance</li> <li><input type="checkbox"/> Employee Booking</li> <li><input type="checkbox"/> Function Revenue Booking</li> <li><input type="checkbox"/> Function Revenue per Guestroom</li> <li><input type="checkbox"/> Future Commissions Payable</li> <li><input type="checkbox"/> Group Arrivals</li> <li><input type="checkbox"/> Guestroom Forecast by Manager</li> <li><input type="checkbox"/> Guestroom Productivity</li> <li><input type="checkbox"/> Lost Business</li> </ul>  |

## WHAT ARE DELPHI DATA VIEWS?

**Answer:** Data Views provide a business abstraction of the Delphi database to create ad hoc reports using the customer's preferred reporting tool. Data Views present the data to the consumer in a well documented business orientation. Tables and field names are clearly represented in business terminology that closely matches the application.

This approach makes business-oriented reporting easier for report writers. Rather than simply providing access to the raw tables in the Delphi and Delphi.Net databases, Data Views protect the data from behind-the-scenes changes that may affect the storage tables.

## WHAT IS THE NEWMARKET REPORT MODEL?

**Answer:** Some Delphi customers may lack the expertise and technical skills required to use Data Views with ad hoc reporting tools. Newmarket has created a Microsoft report model written against the Delphi Data Views that is designed to work in conjunction with SQL Server Reporting Services.

The Delphi Report Model provides business names for database fields and tables, defines relationships between tables, and presents information in logical groupings called "reporting perspectives". The Report Model includes all data available in the Delphi Data Views, enabling users to do the following:

- Build account- and contact-level reports, booking-level reports, and event- and BEO-level reports.
- Report against creation date/time and user information.
- Customize reports using account, contact, and booking UDFs.
- Report on system Setup values.
- Easily group a report by specific records.

## WHAT IS MICROSOFT REPORT BUILDER?

**Answer:** Report Builder is a reporting tool developed by Microsoft. It is similar to Market Vision and offers a robust user interface and excellent export capabilities, allowing users to output their reports to Excel<sup>®</sup> and other data formats such as .pdf, .csv, etc. With its familiar Windows-based paradigms and tools, Report Builder makes report authoring easy. Users can design reports based on the business terms they are familiar with, but without needing to understand database schemas or how to write SQL or MDX queries. Report Builder uses the Delphi Report Model definitions to automatically generate the underlying source query for retrieving the requested data. It works with both SQL Server and Analysis Services data sources.

Users can easily create reports by selecting report layout templates containing pre-defined data sections, such as tables, matrices, and charts. Next, they simply drag and drop report items from the model to the design surface and set constraints to filter the report data. The Report Model contains all of the necessary information for Report Builder to automatically generate the source query and retrieve the requested data.

With the Report Builder customers can easily:

- Add text and formatting to reports.
- Create new fields and calculations using the model.
- Preview, print, and publish reports.
- Export report data to various formats such as Excel.
- Interactively explore data related to the content of their report.

## WHAT IS MICROSOFT REPORT DESIGNER?

Report Designer is a collection of graphical query and design tools that are hosted within the Microsoft Visual Studio<sup>®</sup> environment. Report Designer provides a Data tab to organize report data, and Layout and Preview tabs to help users design reports interactively. Report Designer also provides query designers for retrieving data and the Expression window for specifying the data to use in the report layout.

Report Designer includes the following features:

- Design Reports.** Report Designer supports tabular, matrix, chart, and freeform reports. Reports and gauges are saved as report definition (.rdl) files.
- Preview Reports.** While designing a report, you can test it locally before publishing it to a report server. When you select the Preview tab, Report Designer runs the report using the same processing and rendering extensions that the report server uses, ensuring that the report is displayed as it was intended when users run it. When you are ready to publish your report, use Report Designer to publish it to a report server.
- Deploy to a Server.** When you deploy a report, the report definition (.rdl) file is copied to the report server database. After a report is deployed, it can be managed and secured independently from the report definition file that you work with in Visual Studio.
- View Reports.** SQL Server Reporting Services provides multiple ways to view reports. You can view the report directly using a browser and Report Manager, create subscriptions for report delivery, or export the report to a different file format, such as Excel or Word.
- Manage Reports.** You can manage deployed reports and their data sources independently.

## WHAT ARE THE KEY BENEFITS OF SQL SERVER REPORTING SERVICES (SSRS)?

**Answer:** SQL Server Reporting Services empowers Newmarket's customers to create reports with superior authoring, management, delivery, and security capabilities. Using SSRS customers can:

- ❑ Schedule reports to run at any time (for example, during off hours).
- ❑ Automatically deliver reports to key stakeholders (for example, e-mail reports to the Director of Sales).
- ❑ Create user groups to secure reports within SSRS.