

Microsoft® SSRS - Report Builder Class

Newmarket International SSRS Training

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. This document is intended to provide an overview of the Report Builder 1.0 Class used with the Newmarket Report Model for Microsoft SQL Server® 2005 Reporting Services.

PREREQUISITIES

Report Builder 1.0 with the Newmarket Report Model is designed for customers on Delphi 9.5.2 SP1 or higher.

Instruction is focused on beginning report creators with limited skill sets:

- 0 to 1 years of Delphi experience
- 0 to 2 years of report writing experience

GOALS

- Create account, contact, or booking lists
- Create booking revenue with simple subtotals and grand totals
- Create reports with simple filters and parameters
- Create simple expressions (i.e. Food + Beverage)

SKILLS LEARNED	<ul style="list-style-type: none"> <input type="checkbox"/> Report Manager Administration and Security <input type="checkbox"/> Designing Reports <input type="checkbox"/> Sorting Fields <input type="checkbox"/> Formatting Fields <input type="checkbox"/> Filtering of Data <input type="checkbox"/> Creating Basic Parameters <input type="checkbox"/> Creating Simple Expressions <input type="checkbox"/> Automated Grouping of Data <input type="checkbox"/> Adding Automated Subtotals/Grand Totals <input type="checkbox"/> Running a report from the Report Manager <input type="checkbox"/> Create a few reports to be able to use in your daily activities
TRAINING DAYS	1 day

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.

Instructor-Guided Created Reports	<ul style="list-style-type: none"> <input type="checkbox"/> Account Audit <input type="checkbox"/> Account Creation <input type="checkbox"/> Accounts by Sale Manager <input type="checkbox"/> Bookings by Market Segment 	<ul style="list-style-type: none"> <input type="checkbox"/> Contact Name and Address <input type="checkbox"/> Quick Forecast <input type="checkbox"/> Sales Manager Forecast <input type="checkbox"/> Slippage
Reports Created in Lab Exercises	<ul style="list-style-type: none"> <input type="checkbox"/> BEOs Not Complete <input type="checkbox"/> Blocked Rooms <input type="checkbox"/> Bookings by Type 	<ul style="list-style-type: none"> <input type="checkbox"/> Deposits Due <input type="checkbox"/> Function Revenue Booking <input type="checkbox"/> Future Commissions Payable <input type="checkbox"/> Future Function Revenue by Market Segment

WHAT IS THE NEWMARKET REPORT MODEL?

Answer: 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 Newmarket’s Market Vision ad hoc reporting tool and offers a robust user interface and excellent export capabilities, allowing users to output their reports to Excel® 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 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.

WILL THE ONE DAY REPORT BUILDER 1.0 WITH THE NEWMARKET REPORT MODEL TRAINING INCLUDE CONFIGURING ACCESS FOR THE USERS OF THE REPORT MODEL?

Answer: Yes. The one-day Report Builder 1.0 with the Newmarket Report Model training includes the Administration and Security session, which includes configuring user access. Your IT Department will need to be involved in Mapping and User Domain creation.