



Intermediate

# Microsoft® SSRS - Report Designer Class with Newmarket Report Model

Newmarket International SSRS Training Options

## 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 Designer Class used in conjunction with the Newmarket Report Model for Microsoft SQL Server® 2005 Reporting Services.

## PREREQUISITIES

Report Designer class with the Newmarket Report Model is designed for customers on Delphi 9.5.2 SP1 or higher. Instruction is focused on intermediate report creators with a minimum of:

- 1 to 2 years of Delphi experience
- 2 to 5 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)
- Create complex expressions (i.e. If/Then/Else expressions)
- Create parameters with values populated from the database
- Create revenue reports with multiple subtotals
- Create multiple groups
- Creator autonomy with report layout

## SKILLS LEARNED

- Report Manager Administration and Security
- Designing Reports
- Sorting Fields
- Formatting Fields
- Filtering Data
- Creating Complex Parameters
- Creating Complex Expressions
- Custom Grouping of Data
- Adding Custom Subtotals/Grand Totals
- Adding Drill-Downs
- Conditionally Formatting Fields
- Deploying Reports
- Scheduling Report Delivery
- Reporting on Consumed Dates
- Running a report from the Report Manager
- Report Builder 1.0 with the Newmarket Report Model
- Report creating strategy for the report requestor
- Create over two dozen reports to be able to use in your daily activities

## TRAINING DAYS

4 days

## 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.

<b>Instructor-Guided Created Reports</b>	<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> </ul>	<ul style="list-style-type: none"> <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>
<b>Reports Created in Lab Exercises</b>	<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> </ul>	<ul style="list-style-type: none"> <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>

## 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 DESIGNER?

Report Designer is a collection of graphical query and design tools that are hosted within the Microsoft Visual Studio® 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.

## WE HAVE REPORT CREATORS WHO ARE AT DIFFERENT SKILLS SETS. WHAT DO YOU SUGGEST?

**Answer:** You will need to bring your report creators to good middle ground. Here is a plan that will accomplish that. We recommend the following:

- ❑ Schedule the Report Builder 1.0 with the Newmarket Report Model training for your beginning report creators. Allow time (3 to 6 months) to increase their skill set before scheduling the next training.
- ❑ Schedule the Report Designer with the Newmarket Report Model training for all of your report creators.

## IF I WANT TO LEARN HOW TO WRITE PERFORMANCE REPORTS WHAT DO YOU SUGGEST?

**Answer:** Delphi performance information is only included with the Delphi Data Views, as such we recommend the Report Designer with Delphi Data Views training class. Evaluate the required report skill set for this class and determine if your skills match those requirements? If so, schedule training. If not, here is a recommended plan that will get you there and meet your needs in the interim:

- ❑ Schedule the appropriate training to learn to create reports based on your current skill set.
- ❑ Increase your skill set after training through practice to be ready for more advanced training in 6 to 12 months.
- ❑ Additionally you may contract with Newmarket to create desired performance reports you need today.
- ❑ If you have already taken the Report Designer Class with the Newmarket Report Model and need to create performance reports, then please contact Newmarket to discuss additional training options.