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Deltek Vision® 6.X

Microsoft SQL Server® Reporting Services (SSRS) Licensing FAQ

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Overview

In Vision 6.x, the Actuate® reporting platform was replaced with Microsoft SQL Server® Reporting Services (SSRS), which is part of the Microsoft SQL Server product line. Since Actuate and SQL Server Reporting Services are licensed differently, this document addresses the licensing implications that existing customers and new customers may face with the move to Vision 6.x.

If You Need Assistance

If you need assistance installing, implementing, or using Vision, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 20 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Customer Care Connect Web portal.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Find out more about these and other services from the Customer Care Connect site.

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web portal for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options you have at the Customer Care Connect site:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Subscribe to Deltek communications about your Deltek products and services
- Receive alerts of new Deltek releases and hot fixes

If you need assistance using the Customer Care Connect site, the online help available on the site provides answers for most questions.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to https://deltek.custhelp.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In.**

If you do not have a username and password for the Customer Care Connect site, contact your firm's Vision Administrator.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Additional Documentation

The following table lists the additional related Deltek documentation available. Except where noted, all the user guides listed in this table are available for download from the Knowledge Center tab of the Deltek Customer Care Connect site.

Document Name	Description
Deltek Vision 6.1 Custom Reports and Microsoft SQL Server® Reporting Services	This guide provides information that is necessary to create, deliver, and generate Vision custom reports.
Deltek Vision Configure Analysis Cubes	This document provides a list of the required prerequisites and the steps to configure your database server for Deltek Vision Analysis Cubes.
Deltek Vision Performance Management Canvases Installation Guide	This guide contains the information that you need to install the various components of the Performance Management Canvas software.
Deltek Vision 6.1 Technical Readiness Guide	This guide contains technical information to prepare technical staff at your company who maintain the hardware and software required to deploy Vision, and those who are responsible for installing and configuring the Vision application for the new technology that Vision 6.x uses.
Deltek Vision Technical Installation Guide	This guide contains detailed instructions for installing all technical components of Vision, including the servers, the database, and the application itself.

Document Name	Description
Deltek Vision 6.x Technical Overview & System Requirements: Simple Deployment (1-25 Employees)	This document provides your firm's IT department with information about the technical deployment of Vision using a Simple Deployment model (three Vision physical servers).
Deltek Vision 6.x Technical Overview & System Requirements: Basic Deployment (25-150 Employees)	This document provides your firm's IT department with information about the technical deployment of Vision using a Basic Deployment model (three Vision logical tiers and two physical servers).
Deltek Vision 6.x Technical Overview & System Requirements: Advanced Deployment (150 or More Employees)	This document provides your firm's IT department with information about the technical deployment of Vision using the Advanced Deployment model (three Vision logical tiers and three or more physical servers).

Differences Between the Actuate and SQL Server Reporting Services Licensing Models

For Vision 5.x and earlier versions that relied on the Actuate reporting platform, Deltek licensed Actuate through an OEM agreement and distributed the product with all versions of Deltek Vision. In addition, Deltek's agreement with Actuate allowed you to scale Actuate onto multiple reporting servers without the need to acquire additional Actuate licenses from Deltek or Actuate. With the Actuate licensing model, Deltek incurred the cost of Actuate so you did not see a direct cost impact from an Actuate licensing perspective.

By contrast, SQL Server Reporting Services is licensed as part of the Microsoft SQL Server product line. Because SQL Server is required for Vision's transactional database, all Vision customers have some form of SQL Server licenses to support the Vision product. However, depending on the version of SQL Server you own and the number of reporting servers you use, there may be additional SQL Server licenses required to support Vision 6.x.

SQL Server Editions

For firms upgrading to Vision 6.x, several versions of SQL Server are supported. Some versions have limitations related to the reporting functions available in Vision 6.x.

The four versions of SQL Server are:

- SQL Express (free runtime version)
- Workgroup
- Standard
- Enterprise

It is important to understand what Vision reporting features are supported with each version of SQL Server. The following table outlines the different reporting functionality that is supported with each edition of SQL Server.

As noted in the following table:

- All Vision 6.x reporting functions, including Analysis Cubes, are supported by the Standard and Enterprise editions.
- For firms using the Express or Workgroup editions, it is important to note that the Analysis Cubes is **not** supported.
- Custom reporting tools are not available for SQL Express.
- The Workgroup edition has custom reporting capabilities, however the tools are more limited than the Standard or Enterprise editions.

Reporting Functionality by SQL Server Editions

	SQL Server Editions				
	Express	**Workgroup**	**Standard**	**Enterprise**	**Comments**
Reporting Functionality					
Analytics					
Vision Analysis Cube Support			✓	✓	Requires Analysis Services (available only in Standard and Enterprise editions)
Custom Reporting					
Report Builder		✓	✓	✓	
Report Models for Report Builder		✓	✓	✓	
Report Designer	✓	✓	✓	✓	
Standard Reporting					
Access to All Standard Reports	✓	✓	✓	✓	
Archive (Previous Run)			✓	✓	
Email Reports	✓	✓	✓	✓	
Email Report Links			✓	✓	
Schedule Reports	✓	✓	✓	✓	
Schedule and Archive			✓	✓	
Search and Download in Preview			✓	✓	Workgroups and Express do not have XML download support needed for this feature.

The following table provides some guidelines for typical deployment scenarios and the recommended edition of SQL Server. Your deployment scenario may have other variables that require a different version of SQL Server, so please contact Deltek Technical Systems Engineering at techse@deltek.com for assistance if you have other concerns.

Abbreviations used in the table are:

- GB = Gigabyte
- PB = Petabyte

SQL Version	Limitations	Recommended Deployment Model	Database Size
SQL 2008 Express: Requires Advanced Services for Reporting	▪ 1 GB maximum of memory ▪ 4 GB maximum memory for SSRS ▪ 1 CPU maximum ▪ 4 GB maximum database size	▪ Simple deployment (firms with fewer than 40 employees) ▪ Test environment only	10 GB
SQL 2008 Workgroup: Includes Enterprise Management Tools	▪ 3 GB maximum of memory ▪ 2 CPU maximum	Small to mid-size firms with fewer than 140 employees	524 PB
SQL 2008 Standard: Includes Enterprise Management Tools, Analysis Services, and Snapshot Archiving	▪ Memory limited by operating system ▪ 4 CPU limit	Firms with 150+ employees	524 PB
SQL 2008 Enterprise: Required for scale out (2 or more report servers sharing a single transactional database)	▪ Memory limited by operating system ▪ Number of CPUs limited by operating system	Large firms that will require more than 4 CPU processing capability	524 PB

Deltek does not recommend using the Workgroup edition of SQL Server.

When you use the Workgroup edition:

- Your Vision database must always be on the report server. You cannot use a remote SQL Server instance to host the report server database.
- Data sources used in a report must also be SQL Server databases that run on the local machine running the SQL Server Database Engine instance. You cannot use remote data sources or other data source types. To use additional data source types, you must use a different edition of Reporting Services.
- SQL Server and Reporting Services require memory to process the data and reports. Having a 3 GB maximum limitation may be a detriment to performance as the Vision database grows.

For more information from Microsoft regarding the various SQL Server editions, see:

- http://www.microsoft.com/sqlserver/2008/en/us/editions.aspx
- http://msdn.microsoft.com/en-us/library/cc645993.aspx

Frequently Asked Questions

Below are some frequently asked questions related to Vision 6.x and SQL Server Reporting Services licensing and functionality. This information can help guide your discussion and decision making. Given the technical nature and variables associated with SQL Server and the licensing requirements for Vision 6.x, please contact Deltek Technical Systems Engineering at techse@deltek.com if you have further questions.

What versions of SQL Server does Vision 6.x support?

Vision 6.x supports SQL Server 2008 for the reporting tier.

However, you **must** create all custom reports using the SQL Server 2005 custom reporting tools. The reason for this is that the RDL file format that was created using the SQL Server 2008 tools is not yet supported by the Deltek .Net reporting framework. When you use SQL Server 2008 for reporting, you also have access to the SQL Server 2005 reporting tools.

Is there a specific release of SQL Server 2008 that Deltek recommends?

There were important fixes and updates included in the SQL Server 2008 R2 SP1 + CU1 release. Be sure that you use this release or later.

In what situations will moving from Vision 5.x or earlier to Vision 6.x require additional SQL Server licenses to support SQL Server Reporting Services?

This depends on several factors, including:

- The version of SQL Server that you use
- Whether or not you have Actuate running on one or more report servers that are separate from your database server
- The Vision reporting features that you use

The following are some general guidelines to help you determine which SQL Server edition is most appropriate for you:

- **Custom Reporting** — If you use the Express or Workgroup editions and want to build complex custom reports yourselves, you most likely need to upgrade to the Standard edition because Report Designer is not included in the Express or Workgroup editions.
- **Analysis Cubes and Vision Performance Management** — If you want to use Analysis Cubes or Vision Performance Management, which runs on Analysis Cubes, you need either the Standard or Enterprise editions.
- **End User Reporting Functionality** — If any of the following Vision 6.x features are critical to you, you must use either the Standard or Enterprise editions:
  - Archiving reports (previously run report feature)
  - Emailing report links
  - The report viewer Search and Download feature

- **Scalability** — For performance reasons, you may need to run SQL Server Reporting Services on a separate server from your Vision transactional SQL Server database. If this is the case, you need SQL Server licenses for each additional server that you use for reporting. SQL Server is licensed per processor, so if a report server has two processors, you need a license for each processor on that report server.
- **Clustering and Load Balancing** — If you use separate report servers to perform clustering and load balancing for your Vision SQL Server Reporting Services deployment, you need the SQL Server Enterprise edition and licenses for each processor on your report servers.

If we currently use Actuate, what server deployment scenarios would require additional SQL Server licenses?

The table below provides some deployment scenarios and guidelines when you move to Vision 6.x and SQL Server Reporting Services. These are just guidelines, so please contact Deltek Technical Systems Engineering at techse@deltek.com for more assistance.

Number of Users	Deployment Scenario	Number of Separate Report Servers or Processors	Recommended SQL Server Edition	SQL Server Licensing Impact (Number of New Processor Licenses)
Fewer than 40	Simple deployment with all tiers of Vision running on a single server class machine.	N/A	Express	N/A
40–125	Typically deployed on two physical servers. With Vision 6.x, you must add either one physical processor for SSRS and/or an additional server.	Add one processor to existing server running SSRS, or add a separate report server	Standard	1– 2
125–300	Vision is deployed on three physical servers. You already own SQL Server for your transactional database. Moving to SSRS would require that you purchase a minimum of one processor license for SSRS, for the report server. Currently most Deltek customers have a dual processor report server for Actuate, which requires two SQL processor licenses.	A separate report server that requires one or two processors. A two-processor report server is more typical.	Standard	1– 2

Number of Users	Deployment Scenario	Number of Separate Report Servers or Processors	Recommended SQL Server Edition	SQL Server Licensing Impact (Number of New Processor Licenses)
300–500	When you deploy Vision in this scenario, you face performance challenges. The Vision deployment is 3–5 servers with one server dedicated to SQL and one or two servers dedicated to Actuate as the report servers. With multiple report servers, you must purchase the Enterprise edition of SSRS, which allows you to set up a cluster. If you are able to get by on a single report server, you may still face some performance challenges if you anticipate significant growth. In order to plan for that growth, Deltek typically suggests using the SSRS Enterprise version.	One to two separate report servers that require one or two processors per server.	Standard or Enterprise	2–4
1,000 +	The Vision deployment is five or more servers with one server dedicated to the SQL transactional database and 2+ servers dedicated to Actuate as the report servers. In most cases you already own two processor licenses (sometimes four) for your transactional SQL database. With Actuate you have a minimum of two report servers. With multiple report servers, you must purchase the SSRS Enterprise edition, which would allow you to set up a cluster. If you are able to get by on a single report server, you still face the same challenges if you anticipate significant growth. In order to plan for that growth, Deltek generally suggest the SSRS Enterprise edition.	Two or more separate report servers with typically two processors per server.	Enterprise	4 or more

How do we purchase a SQL Server license?

Microsoft has two channels for distributing SQL Server. You can purchase directly from Microsoft through their online store or through authorized partners or distributors. Typically, Deltek customers purchase their SQL Server licenses through an authorized partner or distributor because they provide more competitive pricing. In addition, some customers have enterprise licensing agreements with Microsoft, which provides firms with licenses under an umbrella agreement.

Through Deltek's relationship with Microsoft, are there any other options for distributing SQL Server more economically?

Deltek is currently evaluating whether or not to become a SQL Server reseller. This would provide Deltek with special purchasing discounts from Microsoft that could be extended to Deltek customers. Because becoming a SQL Server reseller would require Deltek to provide all support and services related to SQL Server, we have a cross-functional team exploring the impacts to our current business model.

At this time, Deltek does not know when or if special pricing as a SQL Server reseller will become available to Deltek customers. If you feel that your situation requires special handling in the interim, please contact Deltek Technical Systems Engineering at techse@deltek.com.

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