



Report Services 5e Training Outline

Stoneware™ Inc.

Stoneware, Inc.

Report Services Training – Outline

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Overview

This document will provide an outline for the Report Services 5e Training course. This outline will provide a breakdown of the chapters and labs that make up the content in the Report Services training manual.

Part I - Introduction

Introduction of Report Services 5e Training Course

Welcome
Overview of Report Services Two Day Training Class
New Features in Report Services 5e

Part II – Report Services Feature / Benefits

This chapter will discuss the features and benefits of Stoneware's Report Services.

Overview of Report Services Primary Features and Functions
Report Services Requirements
Report Services and webNetwork Integration

Part III - Report Services Architecture

Learn the components that make up the Report Services Architecture and they interoperate.

Report Services Server/Relay Architecture
Incorporating within existing Firewalls and DMZs
Database Requirements (ODBC/JDBC)

Part IV - Installation

Learn how to install the Report Services on a Microsoft Windows server.

File Installation and Report Services Installation Wizards
Upgrade Process from Report Services 5

Lab 4-1: Report Services Installation
Lab 4-2: Configuring Report Services to run as a Windows Service
Lab 4-3: Starting and Stopping Report Services

Part V – Report Services Management

Understanding the tools used to build, secure, and distribute reports through Report Services.

Managing Users and Groups through webAdmin
Creating Database Connections to Databases
Assigning Users as “Report Builders”
Creating Reports through Report Builder

Lab 5-1: Creating Users and Groups through webAdmin
Lab 5-2: Configuring a connection to a database (ODBC)
Lab 5-3: Configuring a connection to a database (JDBC)
Lab 5-4: Configuring access to the database through the Report Builder
Lab 5-5: Assigning users as “Report Builders”
Lab 5-6: Verifying access to the databases through Report Builder
Lab 5-7: Starting and Stopping the Report Service

Part VI – Report Builder

Chapter 6 will help the student become familiar with Report Builder (Report Building Interface).

Understanding Report Builder and its Views
The Report Designer View
The Query Builder View
Exploring the Database using the Table Browser
Querying the Database with Interactive SQL

Lab 7-1: Starting the Report Builder
Lab 6-2: Using Query Builder to connect to the Demo database
Lab 6-3: Browsing the Database Schema with the Table Browser tool
Lab 6-4: Querying the Database with the Interactive SQL tool
Lab 6-5: Exploring the Database Driver features

Part VII - Query Builder

This chapter will focus on the Query Builder and how it is used to extract information from a selected database.

Overview of the Query Builder tool and features
Selecting Tables and Fields with the Query Builder
Accessing Database Functions through the Function Builder
Previewing Queries through the Preview Tool
Building SQL Select Statements with Query Builder

Lab 7-1: Building a Simple Query with Query Builder
Lab 7-2: Previewing Query Results
Lab 7-3: Viewing the SELECT (SQL) Statement
Lab 7-4: Adding a Custom Function to the Query

Lab VIII - Report Builder

This chapter will focus on the Report Designer and how it is used to control the “Look and Feel” of a report.

Overview of Report Designer and its Features
Selecting the Type of Report Layout
Overview of Report Layouts (PDF, HTML, XML, Excel, Chart, Graph, Pie, etc)
Using Templates to Create Reports

Lab 8-1: Creating an HTML Report Layout
Lab 8-2: Saving the Report
Lab 8-3: Viewing the Report through the Report Designer

Lab IX – Distributing Reports

This chapter will focus taking a report and distributing it to other users and groups within the system.

Understanding How Reports are Secured and Distributed to Other Users and Groups
Understanding the Differences Between Report Viewers and Editors
Assigning Reports to Users and Groups
Accessing Reports through the webDesktop

Lab 9-1: Assigning Report Viewers
Lab 9-2: Assigning Report Editors
Lab 9-3: Accessing Reports through the webDesktop

Lab X – Building the first Report

This chapter will step through the complete process of creating a dynamic report. The labs will have the user selecting data within the Query Builder and then creating its layout in the Design Builder.

Review the Steps to Create a Report
Review the Differences Between the Query and the Layout

Lab 10-1: Create the Report Query
Lab 10-2: Create the Report Layout
Lab 10-3: Assign the Report to Users

Lab XI – Customizing the Layout

This chapter will have the student change the report layout to several different types of formats.

Review Report Layout Formats
Discuss saving the Query and Changing the Layout

Lab 11-1: Alter the Report Layout to PDF format
Lab 11-2: Alter the Report Layout to XML format

Lab 11-3: Alter the Report Layout to JGRID format
Lab 11-4: Alter the Report Layout to Billboard format
Lab 11-5: Alter the Report Layout to Excel format

Lab XIII – Setting the Report Criteria

This chapter will demonstrate how to set the report's criteria to control the data records that are returned within the report. Students will learn to configure both static and dynamic report criteria.

Detailed Discussion on Setting Report Criteria
Understanding AND(s) and OR(s)
Understanding Static Criteria
Understanding Dynamic Criteria
Prompting the User for Dynamic Criteria
Using Directory Services to Control the Criteria

Lab 13-1: Setting Static Criteria on a Query
Lab 13-2: Using ANDs and ORs in the SELECT Statement
Lab 13-3: Prompting the User for Criteria
Lab 13-4: Inserting Identity into the Criteria

Lab XIV - Creating Graphs and Charts

This chapter will teach the students how to create report layouts using graphs and charts. Students will learn how to use functions to summarize data that can be displayed in a chart or graph.

Understanding Graphs and Charts
Differences between Graph and Chart Layouts
Summarizing Information with Functions

Lab 14-1: Adding a Function to the Query to Summarize Data
Lab 14-2: Using Functions to "Cleanup" data
Lab 14-3: Building a Bar Chart
Lab 14-4: Building an Area Graph
Lab 13-5: Building a Pie Chart

Lab XV - Drill-down Reports

This chapter will demonstrate how to tie two or more reports together with the "drill-down" reporting option. This feature allows users to get more detailed reporting information by connecting one or more reports.

Explanation of Drill-down Report and How They Work
Linking Drill-down Reports through the Report Designer
Using Drill-down Functionality to Connect to External Sites and Applications

Lab 15-1: Creating an HTML Drill-down Report

Lab 15-2: Creating Sub-reports
Lab 15-3: Creating a Pie Chart Drill-down Report
Lab 15-4: Creating a Drill-down Report to an External Web Site

Lab XVI – Joining Two or More Tables

This chapter will teach the student how to use the SQL JOIN to connect the database between two or more related tables.

Understand the Concepts of SQL JOINS
Using JOINS to Build More Detailed Reports
Explanation of JOIN Types (INNER, OUTER, etc)

Lab 16-1: Create a Query that JOINS Two Tables
Lab 16-2: Create a Invoice Report Layout that Displays Data from Both Tables

Lab XVII – Headers and Footers

This chapter will demonstrate how to create a report that uses GROUP HEADERS and FOOTERS. These reports will often summarize information on a specific grouping such as customer number.

Understanding Group Headers and Footers
Using Group Headers and Footers in the Report Designer
Summarizing Information with Group Headers and Footers

Lab 17-1: Modify the Invoice Report to Group by Customer
Lab 17-2: Summarize Data in Each Grouping

Lab XVIII – Scheduling and Report Triggers

This chapter will demonstrate how to schedule HTML and PDF reports to run automatically. In addition, this lab will focus on using the report criteria to “trigger” delivery of reports based on specific data criteria.

Discuss Report Scheduling and Email Delivery
Understand How to Create Report “Triggers” through Scheduling
Creating Dynamic Triggered Reports through “Feeder” Reports

Lab 18-1: Configure Mail Service
Lab 18-2: Create a Scheduled Report
Lab 18-3: Create a “Triggered” Report
Lab 18-4: Use Feeder Report to Create Dynamic Triggered Reports

Lab XIX – Mobile Reports

This chapter will teach the student how to create mobile reports through the Report Builder tool. Students will be able to create and access their mobile reports.

What Makes a Report Mobile?

Interface Considerations When Building Mobile Reports

Discuss Mobile Devices and Profiles

Lab 19-1: Create Invoice Lookup Report

Lab 19-2: Make Invoice Lookup Report Available through a Mobile Device

Lab 19-3: Create a Drill-down Report Accessible through the Mobile Device

Lab 19-4: Login to the Mobile Device and Access Reports

Part XX - Form Services

Learn how to build and deploy electronic forms to webNetwork users. Integrate forms with existing reports to provide complete data collection and reporting within the organization.

Overview of Form Services

Discuss Form Builder Features and Functions

Discuss Integrating Forms with Reports

Lab 20-1: Building a Form

Lab 20-2: Launching a Form from a Report