Introduction

- **Knowledge Requirements:**
  - Beginning to intermediate SQL skills
  - Report Studio Part 1

- **Training Environment:**
  - Demonstration
    - Standard Voyager Analyzer Installation
    - Customer Database
  - Hands-on Exercises
    - Standard Voyager Analyzer Installation
    - Customer Database
Introduction

Training Goals:

- Add to Report Studio mechanics skill set
  - Create and navigate thru a multi-page report.
  - Create a report from scratch using a blank template.
  - Apply conditional formatting to a report.
  - Know how to share reports using XML.
  - Use existing SQL in Analyzer.

Introduction

Agenda:

- Queries & Combining Queries
- Multiple Report Pages
  - Prompt Page
- Multiple objects
  - Different data
  - Same data
  - Blank Report Template
  - Query

- Conditional Formatting
- Sharing XML
- Using Existing SQL
Multiple Report Pages (Ex. Prompt Page)

- Customized prompt pages can be created in place of the default, generic pages from Report Studio. Prompt pages are often used to:
  - Add instructions, headings, branding, etc.
  - Control appearance
Exercise 1—Prompt Page

- Create a simple purchase order report. Filter the report by date. Now create a prompt page for the date filter(s).

- Save as Exercise 1 – Simple Purchase Order Report with Prompt Page

Calculations

- Available Measures
- Query Calculations
- Summarize
Exercise 2 – Query Calculation

• Create a new list report for number of Days on Order.

• Filter on vendor type and Order Date.

• Create a prompt page for both filters.

• Save as Exercise 2 – Query Calculation (Number of Days on Order)

Exercise 3 – Query Calculation

• Create a list report of patrons (name, barcode and status) with overdue titles (title, barcode and status). Include a column that reports the number of days overdue.

• Save As: Exercise 3 – Query Calculation (Days Overdue)
  – Using an existing measure
  – Using calculated measure
Creating a Report Using a Blank Template

- Analyzer Level Activity
  - Query Studio – L1
  - Report Studio – L2
  - Starting w/Blank Template – L3

Exercise 4 – New Blank Report (Using Multiple Lists)

- Create a report of record counts by operator.
  - This report can be used to identify imported records.
  - Three lists – Bib, MFHD, Item
  - Count ID numbers
  - Save As: Exercise 4 – Record Counts by Operator
Exercise 5 – New Blank Report (Two objects, One query)

- Create a charge transaction report looking for outstanding transactions by circulation location. The data should be grouped into years and months. The report should have a list and a chart.

- Save as Exercise 5 – Transaction Count

Conditional Styles/Formatting

- Control what users see

- Requires use of variables

- Created using Condition Explorer or Properties Pane
Exercise 6 – Conditional Styles

- Use Exercise 4 - Record Counts by Operator to apply conditional formatting
- Save as Exercise 6 – Conditional Styles

Sharing Reports—Demo

- Report Studio
- Copy to clipboard
- Paste to XML Share (SupportWeb) or Notepad file
Using Existing SQL—Demo

- Third party application, service, etc.
- SQL statement

**Recommendation: Rewrite statement**

- Cleaner SQL
- Database generic
- Report optimization

End of Training

**Session Summary**

- Multiple Report Objects
- Multi-page report
- Blank Report Template
- Query Options
- Conditional Styles
- Sharing Reports via XML
- Using Existing SQL
End of Training

- Any questions?
- Contact Project Manager

Thank You!