

# Basic Report Writer – Notes

## Banner

## Unit 1 Introduction to Training

### Logo

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You will need a logo for some of the exercises.

|               |  |
|---------------|--|
| File Name     |  |
| Stored Where? |  |

## Unit 2 Argos Basics


### Argos Roles

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- Report Viewer: A person who runs reports
- Report Writer: A person who designs how the report looks
- DataBlock Designer: A person who creates the query to access the database to get the data needed by the report

### Argos Definitions

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- DataBlock 
- Created by DataBlock Designers
- Source (parent) of reports
- Contains the SQL query that returns the data for the report
- Dashboard
- Created by DataBlock Designers
- User interface
- May have parameters to constrain report data
- May display information using charts and OLAP cubes
- Report
- Created by Report Writers
- Design of the DataBlock query output

Notes






## Login Information

### MAPS

- Multiple Application Server
- Access to all Evisions applications
- Login is internal to institution

|               |  |
|---------------|--|
| URL           |  |
| Username      |  |
| Password Hint |  |

## Report Types

| Type                    | Icon                                                                                | Description                                                                                                                                                                                               |
|-------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CSV                     |    | <ul style="list-style-type: none"><li>▪ Text file</li><li>▪ Comma separated value or comma delimited</li><li>▪ Only columns of data</li><li>▪ Commonly used by Excel</li></ul>                            |
| Extract:<br>Fixed Width |    | <ul style="list-style-type: none"><li>▪ Text file</li><li>▪ Columns are a specified width</li><li>▪ Commonly used to send data to external organizations</li><li>▪ Data organized into Sections</li></ul> |
| Extract:<br>Delimited   |   | <ul style="list-style-type: none"><li>▪ Text file</li><li>▪ Columns are separated by a delimiter (can be a comma)</li><li>▪ Commonly used by Excel</li><li>▪ Data organized into Sections</li></ul>       |
| Extract:<br>XML         |  | <ul style="list-style-type: none"><li>▪ Text file</li><li>▪ Commonly used to send data to external organizations</li><li>▪ Data organized into Sections</li></ul>                                         |
| Banded                  |  | <ul style="list-style-type: none"><li>▪ PDF</li><li>▪ Commonly used to present formatted information</li><li>▪ Data organized into Bands</li></ul>                                                        |

Notes

# Unit 3 Excel Reports

Notes

## Exercise 1

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, see a corresponding alternate exercise 1 below.

### Request

Adrian, the CFO, has asked that you create an Excel report that includes all the fields in the Budget Availability DataBlock. He doesn't want anything special, just a dump of the data.

### Exercise

Create a report that Excel can open automatically and includes the following fields.

|              |                          |                           |
|--------------|--------------------------|---------------------------|
| Fund         | Total Adopted Budget     | Total Budget Reservations |
| Organization | Total Budget Adjustments | Fiscal Period             |
| Account      | Total YTD Activity       |                           |
| Program      | Total Encumbrances       |                           |

Sort by Fund, Org, Acct.

What report type will meet the specifications? \_\_\_\_\_

### Materials

- Budget Availability DataBlock

### Example

|    | A    | B      | C       | D    | E                  | F                      | G                | H                 | I                       | J            |
|----|------|--------|---------|------|--------------------|------------------------|------------------|-------------------|-------------------------|--------------|
| 1  | Fund | Orgn   | Account | Prog | TotalAdoptedBudget | TotalBudgetAdjustments | TotalYTDActivity | TotalEncumbrances | TotalBudgetReservations | FiscalPeriod |
| 2  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            |
| 3  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            |
| 4  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            |
| 5  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            |
| 6  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            |
| 7  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            |
| 8  | 2157 | 11004  | 6220    |      | 0                  | 0                      | 610.2            | 0                 | 0                       | 1            |
| 9  | 2157 | 11004  | 6220    |      | 0                  | 0                      | 610.2            | 0                 | 0                       | 1            |
| 10 | 2157 | 11004  | 6240    |      | 595.08             | 0                      | 692.16           | 0                 | 0                       | 1            |
| 11 | 2157 | 11004  | 6250    |      | 2544.48            | 0                      | 2721.72          | 0                 | 0                       | 1            |
| 12 | 2157 | 11004  | 6260    |      | 0                  | 0                      | 4770             | 0                 | 0                       | 1            |
| 13 | 2157 | 11004  | 6280    |      | 600                | 0                      | 147.24           | 0                 | 0                       | 1            |
| 14 | 2157 | 11004  | 6290    |      | 0                  | 0                      | 714.24           | 0                 | 0                       | 1            |
| 15 | 2157 | 11004  | 7110    |      | -5038.25           | 0                      | 0                | 0                 | 0                       | 1            |
| 16 | 2157 | 11004  | 7510    |      | -14395             | 0                      | 0                | 0                 | 0                       | 1            |
| 17 | 2159 | 12604  | 6121    |      | 886800             | 0                      | 0                | 0                 | 0                       | 1            |
| 18 | 2159 | 12604  | 6121    |      | 886800             | 0                      | 0                | 0                 | 0                       | 1            |
| 19 | 2159 | 12604  | 6240    |      | 6537.98            | 0                      | 0                | 0                 | 0                       | 1            |
| 20 | 2172 | 9      | 8200    |      | 75912.2            | 0                      | 0                | 0                 | 0                       | 1            |
| 21 | 3100 | 126011 | 7210    |      | 0                  | 0                      | 125              | 0                 | 0                       | 1            |
| 22 | 3100 | 126012 | 7210    |      | 0                  | 0                      | 157.5            | 157.5             | 0                       | 1            |
| 23 | 3100 | 126014 | 7210    |      | 0                  | 0                      | 0                | 0                 | 0                       | 1            |
| 24 | 3100 | 12603  | 7210    |      | 0                  | 0                      | 0                | 0                 | 0                       | 1            |
| 25 | 3100 | 12604  | 7210    |      | 0                  | 0                      | 0                | 36.87             | 0                       | 1            |

# Alternate Exercise 1

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, use this exercise.

## Request

Margaret, the Vice President for Academic Affairs, has asked that you create an Excel report that includes all the fields in the Course Schedule DataBlock. She doesn't want anything special, just a dump of the data.

## Exercise

Create a report that Excel can open automatically and includes the following fields.

|                  |                    |                       |
|------------------|--------------------|-----------------------|
| Subject          | Campus Desc        | PTRM Code             |
| Crse             | College Desc       | PTRM Start Date       |
| Section          | Department Desc    | PTRM End Date         |
| CRN              | Maximum Enrollment | Instructor ID         |
| Title            | Actual Enrollment  | Instructor Last Name  |
| Term Code        | Seats Available    | Instructor First Name |
| Term Description |                    |                       |

Sort by Subject, Crse, and Section.

What report type will meet the specifications? \_\_\_\_\_

## Materials

- Course Schedule DataBlock

## Example

|   | A    | B    | C       | D     | E                            | F      | G         | H      | I                          | J       | K       | L          | M          | N    | O          | P          | Q         | R         | S          |
|---|------|------|---------|-------|------------------------------|--------|-----------|--------|----------------------------|---------|---------|------------|------------|------|------------|------------|-----------|-----------|------------|
| 1 | Subj | Crse | Section | CRN   | Title                        | Term   | TermDesc  | Campus | College                    | Dept    | MaxEnrl | ActualEnrl | SeatsAvail | Ptrm | Start_Date | End_Date   | Inst_ID   | Inst_Last | Inst_First |
| 2 | BIOL | 1010 | 1       | 10001 | Biological Principles        | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 14      | 8          | 6          | 1    | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    |
| 3 | BIOL | 1011 | 1       | 10002 | Biological Principles Lab    | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 7       | 8          | -1         | 1    | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    |
| 4 | BIOL | 1011 | 2       | 10003 | Biological Principles Lab    | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 8       | 0          | 8          | 1    | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    |
| 5 | BIOL | 1205 | 1       | 10014 | Human Anatomy and Physiology | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 10      | 2          | 8          | 1    | 8/29/1994  | 12/16/1994 | 210293847 | Hebert    | Paul       |
| 6 | BIOL | 1205 | 2       | 10015 | Human Anatomy and Physiology | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 5       | 2          | 3          | 1    | 8/29/1994  | 12/16/1994 | 210293847 | Hebert    | Paul       |

Notes

## Exercise 2

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, see a corresponding alternate exercise 2 below.

### Request

Adrian, the CFO, has looked at the CSV report that you have given him and asks that you modify the report. He wants to see a report run date added to the report.

### Report Description

Modify the existing CSV report and add in a date to indicate the run date.

Function: Now()

### Materials

- Budget Availability DataBlock

### Example

|    | A    | B      | C       | D    | E                  | F                      | G                | H                 | I                       | J            | K              |
|----|------|--------|---------|------|--------------------|------------------------|------------------|-------------------|-------------------------|--------------|----------------|
| 1  | Fund | Orgn   | Account | Prog | TotalAdoptedBudget | TotalBudgetAdjustments | TotalYTDActivity | TotalEncumbrances | TotalBudgetReservations | FiscalPeriod | RunDate        |
| 2  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 3  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 4  | 2157 | 11004  | 6111    |      | 117040             | 0                      | 47700            | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 5  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 6  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 7  | 2157 | 11004  | 6210    |      | 123.12             | 0                      | 284.04           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 8  | 2157 | 11004  | 6220    |      | 0                  | 0                      | 610.2            | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 9  | 2157 | 11004  | 6220    |      | 0                  | 0                      | 610.2            | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 10 | 2157 | 11004  | 6240    |      | 595.08             | 0                      | 692.16           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 11 | 2157 | 11004  | 6250    |      | 2544.48            | 0                      | 2721.72          | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 12 | 2157 | 11004  | 6260    |      | 0                  | 0                      | 4770             | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 13 | 2157 | 11004  | 6280    |      | 600                | 0                      | 147.24           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 14 | 2157 | 11004  | 6290    |      | 0                  | 0                      | 714.24           | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 15 | 2157 | 11004  | 7110    |      | -5038.25           | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 16 | 2157 | 11004  | 7510    |      | -14395             | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 17 | 2159 | 12604  | 6121    |      | 886800             | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 18 | 2159 | 12604  | 6121    |      | 886800             | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 19 | 2159 | 12604  | 6240    |      | 6537.98            | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 20 | 2172 | 9      | 8200    |      | 75912.2            | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 21 | 3100 | 126011 | 7210    |      | 0                  | 0                      | 125              | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 22 | 3100 | 126012 | 7210    |      | 0                  | 0                      | 157.5            | 157.5             | 0                       | 1            | 5/20/2014 8:43 |
| 23 | 3100 | 126014 | 7210    |      | 0                  | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 24 | 3100 | 12603  | 7210    |      | 0                  | 0                      | 0                | 0                 | 0                       | 1            | 5/20/2014 8:43 |
| 25 | 3100 | 12604  | 7210    |      | 0                  | 0                      | 0                | 36.87             | 0                       | 1            | 5/20/2014 8:43 |

#### Notes



Function



Variable list



Data Field list

## Alternate Exercise 2

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, use this exercise.

### Request

Margaret, the VPAA, has looked at the CSV report that you have given her and asks that you modify the report. She wants to see a report run date added to the report.

### Report Description

Modify the existing CSV report and add in a date to indicate the run date.

Function: Now()

### Materials

- Course Schedule DataBlock

### Example

|   | A    | B    | C       | D     | E                            | F      | G         | H      | I                          | J       | K       | L          | M          | N     | O          | P          | Q         | R         | S          | T               |
|---|------|------|---------|-------|------------------------------|--------|-----------|--------|----------------------------|---------|---------|------------|------------|-------|------------|------------|-----------|-----------|------------|-----------------|
| 1 | Subj | Crse | Section | CRN   | Title                        | Term   | TermDesc  | Campus | College                    | Dept    | MaxEnrl | ActualEnrl | SeatsAvail | Pttrn | Start_Date | End_Date   | Inst_ID   | Inst_Last | Inst_First | RunDate         |
| 2 | BIOL | 1010 | 1       | 10001 | Biological Principles        | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 14      | 8          | 6          | 1     | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    | 6/30/2015 10:15 |
| 3 | BIOL | 1011 | 1       | 10002 | Biological Principles Lab    | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 7       | 8          | -1         | 1     | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    | 6/30/2015 10:15 |
| 4 | BIOL | 1011 | 2       | 10003 | Biological Principles Lab    | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 8       | 0          | 8          | 1     | 8/29/1994  | 12/16/1994 | 217829375 | Chapin    | Michael    | 6/30/2015 10:15 |
| 5 | BIOL | 1205 | 1       | 10014 | Human Anatomy and Physiology | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 10      | 2          | 8          | 1     | 8/29/1994  | 12/16/1994 | 210293847 | Hebert    | Paul       | 6/30/2015 10:15 |
| 6 | BIOL | 1205 | 2       | 10015 | Human Anatomy and Physiology | 199510 | Fall 1994 | Main   | College of Arts & Sciences | Biology | 5       | 2          | 3          | 1     | 8/29/1994  | 12/16/1994 | 210293847 | Hebert    | Paul       | 6/30/2015 10:15 |

### Notes



Function



Variable list



Data Field list

## Define the Sections of the Extract Report

| Section | Description                                                                  |
|---------|------------------------------------------------------------------------------|
| Detail  | One row of data or record from dataset                                       |
| Title   | First row in report                                                          |
| Header  | Associated with detail and groups the details by an expression or field      |
| Footer  | Associated with a header section and prints at the end of a group of details |
| Summary | Last row in report                                                           |
| Child   | Associated with a parent section and always print after its parent           |

Notes

## Exercise 3

### Request

Adrian (or Margaret, if using the alternate exercise) comes to you again and has two requests.

1. Does not like the date showing up as a column; wants it at the top of the report only.
2. Adrian wants to sum all the financial data in the report. Margaret wants to know totals for the maximum enrollment, actual enrollment, and seats available columns.

### Questions

Can you sum the data using the CSV report? \_\_\_\_\_

Why or why not? \_\_\_\_\_

\_\_\_\_\_

What report type will you use? \_\_\_\_\_

### Prototype

## Exercise 4

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, see a corresponding alternate exercise 4 below.

### Report Description

Create a report that Excel can open automatically and includes the following fields.

|              |                          |                           |
|--------------|--------------------------|---------------------------|
| Fund         | Total Adopted Budget     | Total Budget Reservations |
| Organization | Total Budget Adjustments | Fiscal Period             |
| Account      | Total YTD Activity       |                           |
| Program      | Total Encumbrances       |                           |


Sorted by Fund, Org, Acct. Include a title, a report run date, a column header row and sum all the data fields.

### Materials

- Budget Availability DataBlock

### Example

|    | A              | B         | C       | D       | E                    | F                        | G                  | H                  | I                         | J             | K |
|----|----------------|-----------|---------|---------|----------------------|--------------------------|--------------------|--------------------|---------------------------|---------------|---|
| 1  | Budget Summary | 5/20/2014 |         |         |                      |                          |                    |                    |                           |               |   |
| 2  | Fund           | Orgn      | Account | Program | Total Adopted Budget | Total Budget Adjustments | Total YTD Activity | Total Encumbrances | Total Budget Reservations | Fiscal Period |   |
| 3  |                | 2157      | 11004   | 6111    | 117040               | 0                        | 47700              | 0                  | 0                         | 1             |   |
| 4  |                | 2157      | 11004   | 6210    | 123.12               | 0                        | 284.04             | 0                  | 0                         | 1             |   |
| 5  |                | 2157      | 11004   | 6220    | 0                    | 0                        | 610.2              | 0                  | 0                         | 1             |   |
| 6  |                | 2157      | 11004   | 6240    | 595.08               | 0                        | 692.16             | 0                  | 0                         | 1             |   |
| 7  |                | 2157      | 11004   | 6250    | 2544.48              | 0                        | 2721.72            | 0                  | 0                         | 1             |   |
| 8  |                | 2157      | 11004   | 6260    | 0                    | 0                        | 4770               | 0                  | 0                         | 1             |   |
| 9  |                | 2157      | 11004   | 6280    | 600                  | 0                        | 147.24             | 0                  | 0                         | 1             |   |
| 10 |                | 2157      | 11004   | 6290    | 0                    | 0                        | 714.24             | 0                  | 0                         | 1             |   |
| 11 |                | 2157      | 11004   | 7110    | -5038.25             | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 12 |                | 2157      | 11004   | 7510    | -14395               | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 13 |                | 2159      | 12604   | 6121    | 886800               | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 14 |                | 2159      | 12604   | 6240    | 6537.98              | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 15 |                | 2172      | 9       | 8200    | 75912.2              | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 16 |                | 3100      | 126011  | 7210    | 0                    | 0                        | 125                | 0                  | 0                         | 1             |   |
| 17 |                | 3100      | 126012  | 7210    | 0                    | 0                        | 157.5              | 157.5              | 0                         | 1             |   |
| 18 |                | 3100      | 126014  | 7210    | 0                    | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 19 |                | 3100      | 12603   | 7210    | 0                    | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 20 |                | 3100      | 12604   | 7210    | 0                    | 0                        | 0                  | 36.87              | 0                         | 1             |   |
| 21 |                |           |         |         | 1070719.61           | 0                        | 57922.1            | 194.37             | 0                         |               |   |
| 22 |                |           |         |         |                      |                          |                    |                    |                           |               |   |
| 23 |                |           |         |         |                      |                          |                    |                    |                           |               |   |



**Best Practice:** Create a delimited extract report instead of a CSV when creating reports for Excel. It gives you more flexibility in the long term.

Notes



## Alternate Exercise 4

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, use this exercise.

### Exercise

Create a report that Excel can open automatically and includes the following fields.

|                  |                    |                       |
|------------------|--------------------|-----------------------|
| Subject          | Campus Desc        | PTRM Code             |
| Crse             | College Desc       | PTRM Start Date       |
| Section          | Department Desc    | PTRM End Date         |
| CRN              | Maximum Enrollment | Instructor ID         |
| Title            | Actual Enrollment  | Instructor Last Name  |
| Term Code        | Seats Available    | Instructor First Name |
| Term Description |                    |                       |

Sort by Subject, Crse, and Section . Include a title, a report run date, a column header row and sum all the numerical fields.


What report type will meet the specifications? \_\_\_\_\_

### Materials

- Course Schedule DataBlock

### Example

| 1 | A               | B                    | C       | D   | E                                  | F         | G         | H      | I                          | J                  | K        | L           | M               | N            | O          | P          | Q             | R               | S                |
|---|-----------------|----------------------|---------|-----|------------------------------------|-----------|-----------|--------|----------------------------|--------------------|----------|-------------|-----------------|--------------|------------|------------|---------------|-----------------|------------------|
| 2 | Course Schedule | Run Date: 06/30/2015 |         |     |                                    |           |           |        |                            |                    |          |             |                 |              |            |            |               |                 |                  |
| 3 | Subject         | Course               | Section | CRN | Title                              | Term Code | Term Desc | Campus | College                    | Dept               | Max Enrl | Actual Enrl | Seats Available | Part-of-Term | Start Date | End Date   | Instructor ID | Instructor Last | Instructor First |
| 4 | BIOL            |                      | 1010    | 1   | 10001 Biological Principles        | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Biology            | 14       | 8           | 6               | 1            | 8/29/1994  | 12/16/1994 | 217829375     | Chapin          | Michael          |
| 5 | BIOL            |                      | 1011    | 1   | 10002 Biological Principles Lab    | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Biology            | 7        | 8           | -1              | 1            | 8/29/1994  | 12/16/1994 | 217829375     | Chapin          | Michael          |
| 6 | BIOL            |                      | 1011    | 2   | 10003 Biological Principles Lab    | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Biology            | 8        | 0           | 8               | 1            | 8/29/1994  | 12/16/1994 | 217829375     | Chapin          | Michael          |
| 7 | BIOL            |                      | 1205    | 1   | 10014 Human Anatomy and Physiology | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Biology            | 10       | 2           | 8               | 1            | 8/29/1994  | 12/16/1994 | 210293847     | Hebert          | Paul             |
| 8 | BIOL            |                      | 1205    | 2   | 10015 Human Anatomy and Physiology | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Biology            | 5        | 2           | 3               | 1            | 8/29/1994  | 12/16/1994 | 210293847     | Hebert          | Paul             |
| 9 |                 |                      |         |     |                                    |           |           |        |                            | Enrollment Totals: | 44       | 20          | 24              |              |            |            |               |                 |                  |



**Best Practice:** Create a delimited extract report instead of a CSV when creating reports for Excel. It gives you more flexibility in the long term.

### Notes

## Exercise 5

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, see a corresponding alternate exercise 5 below.

### Request

You speak with Adrian and he is happy with his report. He tells you that now all he has to do is run the report for each fund to get the summary for each fund. You tell him you can create the report he needs, and group and sum the data for each fund.

### Report Description

Modify the existing delimited report to group by fund and sum each fund group.

### Materials

- Budget Availability DataBlock
- Budget Availability Extract report

### Prototype


What sections do you need to add to the report? \_\_\_\_\_

\_\_\_\_\_

### Notes

### Example

|    | A              | B         | C         | D                    | E                        | F                  | G                  | H                         | I             | J |
|----|----------------|-----------|-----------|----------------------|--------------------------|--------------------|--------------------|---------------------------|---------------|---|
| 1  | Budget Summary | 5/20/2014 |           |                      |                          |                    |                    |                           |               |   |
| 2  | Orgn           | Account   | Program   | Total Adopted Budget | Total Budget Adjustments | Total YTD Activity | Total Encumbrances | Total Budget Reservations | Fiscal Period |   |
| 3  | Fund:          | 2157      |           |                      |                          |                    |                    |                           |               |   |
| 4  | 11004          | 6111      |           | 117040               | 0                        | 47700              | 0                  | 0                         | 1             |   |
| 5  | 11004          | 6210      |           | 123.12               | 0                        | 284.04             | 0                  | 0                         | 1             |   |
| 6  | 11004          | 6220      |           | 0                    | 0                        | 610.2              | 0                  | 0                         | 1             |   |
| 7  | 11004          | 6240      |           | 595.08               | 0                        | 692.16             | 0                  | 0                         | 1             |   |
| 8  | 11004          | 6250      |           | 2544.48              | 0                        | 2721.72            | 0                  | 0                         | 1             |   |
| 9  | 11004          | 6260      |           | 0                    | 0                        | 4770               | 0                  | 0                         | 1             |   |
| 10 | 11004          | 6280      |           | 600                  | 0                        | 147.24             | 0                  | 0                         | 1             |   |
| 11 | 11004          | 6290      |           | 0                    | 0                        | 714.24             | 0                  | 0                         | 1             |   |
| 12 | 11004          | 7110      |           | -5038.25             | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 13 | 11004          | 7510      |           | -14395               | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 14 |                |           | Subtotal: | 101469.43            | 0                        | 57639.6            | 0                  | 0                         |               |   |
| 15 | Fund:          | 2159      |           |                      |                          |                    |                    |                           |               |   |
| 16 | 12604          | 6121      |           | 886800               | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 17 | 12604          | 6240      |           | 6537.98              | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 18 |                |           | Subtotal: | 893337.98            | 0                        | 0                  | 0                  | 0                         |               |   |
| 19 | Fund:          | 2172      |           |                      |                          |                    |                    |                           |               |   |
| 20 | 9              | 8200      |           | 75912.2              | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 21 |                |           | Subtotal: | 75912.2              | 0                        | 0                  | 0                  | 0                         |               |   |
| 22 | Fund:          | 3100      |           |                      |                          |                    |                    |                           |               |   |
| 23 | 126011         | 7210      |           | 0                    | 0                        | 125                | 0                  | 0                         | 1             |   |
| 24 | 126012         | 7210      |           | 0                    | 0                        | 157.5              | 157.5              | 0                         | 1             |   |
| 25 | 126014         | 7210      |           | 0                    | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 26 | 12603          | 7210      |           | 0                    | 0                        | 0                  | 0                  | 0                         | 1             |   |
| 27 | 12604          | 7210      |           | 0                    | 0                        | 0                  | 36.87              | 0                         | 1             |   |
| 28 |                |           | Subtotal: | 0                    | 0                        | 282.5              | 194.37             | 0                         |               |   |
| 29 |                |           | Total:    | 1070719.61           | 0                        | 57922.1            | 194.37             | 0                         |               |   |



**Best Practice:** Review requirements before creating the report.

## Alternate Exercise 5

Note: If the alternate Course Schedule DataBlock was created instead of the Budget Availability DataBlock, use this exercise.

### Request

You speak with Margaret and she is happy with the report. She tells you that now all she has to do is run the report for each College to get the enrollment summaries. You tell her you can create the report she needs, and group and sum the enrollment data for each college.

### Report Description

Modify the existing delimited report to group by college and sum the enrollment data by each college.

### Materials


- Course Schedule DataBlock
- Course Schedule Extract report

### Prototype

What sections do you need to add to the report? \_\_\_\_\_

### Example

| 1  | A                          | B      | C       | D     | E                            | F         | G         | H      | I                          | J               | K                   | L           | M               | N            | O          | P          | Q             | R               | S                |
|----|----------------------------|--------|---------|-------|------------------------------|-----------|-----------|--------|----------------------------|-----------------|---------------------|-------------|-----------------|--------------|------------|------------|---------------|-----------------|------------------|
| 2  | Subject                    | Course | Section | CRN   | Title                        | Term Code | Term Desc | Campus | College                    | Dept            | Max Enrl            | Actual Enrl | Seats Available | Part-of-Term | Start Date | End Date   | Instructor ID | Instructor Last | Instructor First |
| 3  | College of Arts & Sciences |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 4  | ANTH                       | 2010   | 1       | 10009 | Origins of Culture           | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Social Sciences | 10                  | 2           | 8               | 1            | 8/29/1994  | 12/16/1994 | 207000001     | Jansen          | Barbara          |
| 5  | ANTH                       | 2510   | 1       | 10011 | Folk Technology              | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Social Sciences | 8                   | 2           | 6               | 1            | 8/29/1994  | 12/16/1994 | 216483728     | Block           | Charles          |
| 6  |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 7  |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 8  |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 9  | STAT                       | 2107   | 1       | 10043 | Intro. to Statistics I       | 199510    | Fall 1994 | Main   | College of Arts & Sciences | Mathematics     | 10                  | 4           | 6               | 1            | 8/29/1994  | 12/16/1994 | 215738211     | Street          | John             |
| 10 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 11 | College of Business        |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 12 | ACCT                       | 2310   | 1       | 10006 | Intermediate Accounting I    | 199510    | Fall 1994 | Main   | College of Business        | Accounting      | 10                  | 2           | 8               | 1            | 8/29/1994  | 12/16/1994 | 710000010     | Thomas          | Preston          |
| 13 | ACCT                       | 2340   | 1       | 10007 | Accounting for Info. Systems | 199510    | Fall 1994 | Main   | College of Business        | Accounting      | 10                  | 2           | 8               | 1            | 8/29/1994  | 12/16/1994 | 710000010     | Thomas          | Preston          |
| 14 | ACCT                       | 2430   | 1       | 10008 | Accounting Info. Systems     | 199510    | Fall 1994 | Main   | College of Business        | Accounting      | 10                  | 2           | 8               | 1            | 8/29/1994  | 12/16/1994 | 710000010     | Thomas          | Preston          |
| 15 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 16 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 17 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 18 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
| 19 |                            |        |         |       |                              |           |           |        |                            |                 |                     |             |                 |              |            |            |               |                 |                  |
|    |                            |        |         |       |                              |           |           |        |                            |                 | College Enrollment: | 91          | 32              | 59           |            |            |               |                 |                  |
|    |                            |        |         |       |                              |           |           |        |                            |                 | Enrollment Totals:  | 493         | 216             | 277          |            |            |               |                 |                  |



**Best Practice:** Review requirements before creating the report.

Notes

# Unit 4 Text Reports

Notes

## Exercise 6

### Request

Bethany works in the Registrar's office. She needs to send a report to the state with the addresses of applicants. She shows you the report specifications and the specs show the fields that must be in the report, the order of the fields, and the number of characters each field must contain.

### Report Description

- First line: Name of School (45), Contact Email (45), Date of Report (mm/dd/yyyy, 10)
- Data:
- First Name (25), Last Name (25), Street Line 1 (35), City (25), State (2), Zip (10)
- Sorted by Zip Code, Last Name, First Name
- Last Row: Total Count (8)

### Materials

- Address List DataBlock

### Question


What kind of report meets the report specification requirements?

### Example

| File                | Edit       | Format                   | View            | Help    |                          |
|---------------------|------------|--------------------------|-----------------|---------|--------------------------|
| Evisions university |            |                          |                 |         | proservices@evisions.com |
| Clark               |            |                          |                 |         | 05/22/2014               |
| Cuspin              | Henry      | 2100 Mountain Lane       | Pittsburgh      | PA15260 |                          |
| Treary              | Lorie      | 100 Elm Avenue           | Dobbs Ferry     | NY10522 |                          |
| Holt                | Timothy    | 892 S. Poplar Street     | King of Prussia | PA19401 |                          |
| Graber              | Virginia   | 28 Clubhouse             | King of Prussia | PA19401 |                          |
| Nelson              | Cynthia    | 21 King Street           | Malvern         | PA19355 |                          |
| Nelson              | Mary       | 81 Lakshore Drive        | Janesville      | WI53547 |                          |
| Nelson              | Mary       | 81 Lakshore Drive        | Janesville      | WI53547 |                          |
| Treary              | Skip       | 105 bekah Avenue         | King of Prussia | PA19401 |                          |
| Patrick             | Paula      | PO Box 21093             | Troy            | NV12180 |                          |
| Gittlings           | Joyce      | PO Box 938               | Bradford        | PA16701 |                          |
| Shay                | Paul       | 2109 Scott Street        | Media           | PA19063 |                          |
| Shaver              | Ananda     | 823 Sunny Lane           | Hempstead       | NY11550 |                          |
| Markus              | John       | 15 Capital Boulevard     | Harrisburg      | PA17110 |                          |
| Bloom               | Jennifer   | 2100 "M" Street Sw       | washington      | DC20016 |                          |
| Saeyer              | Doris      | 21 Lancaster Avenue      | Villanova       | PA19085 |                          |
| Nelson              | Margaret   | 21 Watson Street         | Ripon           | WI54971 |                          |
| Murthy              | Vijay      | PO Box 21A               | Bradford        | PA16701 |                          |
| Bard                | Celeste    | 1837 Longwood Road       | Snyder          | NY14226 |                          |
| Seshadr             | Renuka     | 1829 King Road           | North whales    | PA19454 |                          |
| Brodey              | Wriam      | 1829 Brook Street        | Wilkes-Barre    | PA18766 |                          |
| Roberts             | Colleen    | 1800 west Elm Street     | Newtown Square  | PA19073 |                          |
| Roberts             | Patricia   | 800 Broad Street         | Philadelphia    | PA19103 |                          |
| Baldwin             | Rhonda     | 1928 Main Street         | Lansdale        | PA18446 |                          |
| Caeser              | Germanicus | 13 Sicily Drive          | Rome            | MA02154 |                          |
| Wiggin              | Kate       | 12 Oak Dr                | waltham         | MA02154 |                          |
| Wiggin              | Kate       | 12 Oak Dr                | waltham         | MA02154 |                          |
| Kurtis              | Nancy      | 507 Paultette Lane       | Janesville      | WI53547 |                          |
| Charles             | Henry      | 2938 wall Street         | Harrisburg      | PA17110 |                          |
| Holtz               | Muriel     | 100 Grand Concourse      | Brooklyn        | NY11225 |                          |
| Cassell             | Helene     | 186 Hartford Court       | Malvern         | PA19355 |                          |
| Hanks               | Robert     | 18237 School Road        | North whales    | PA19454 |                          |
| Harris              | Paulette   | PO Box 1983              | Media           | PA19063 |                          |
| Harks               | David      | 10 Smith Place           | Bradford        | PA16701 |                          |
| Walker              | Jennifer   | 48 Capital Drive Sw      | washington      | DC20052 |                          |
| Stees               | Dorothea   | PO Box 1019              | Malvern         | PA19355 |                          |
| Wallace             | Daniel     | 100 wayward way          | west Chester    | PA19380 |                          |
| Wong                | Kim        | 10 Blue Point Highway    | Ithaca          | NY14853 |                          |
| Surry               | Antoinette | 1800 Pennsylvania Avenue | Wilkes-Barre    | PA18766 |                          |
| Harper              | Victoria   | 4 Smith Lane             | Malvern         | PA19355 |                          |
| Hmaya               | Kimberly   | 392 Clark Avenue         | Pittsburgh      | PA15260 |                          |
| Menard              | carla      | 493 Clubhouse Road       | King of Prussia | PA19401 |                          |

### Independent Exercise

Create a CSV report to review the fields in the Address List DataBlock to confirm that all the required fields are included.



**Best Practice:** Look for an existing DataBlock that meets your needs or can be easily modified before creating new DataBlocks.

# Unit 5 Banded Reports

## Identify Bands

| Section       | Description                                                                                                                        |
|---------------|------------------------------------------------------------------------------------------------------------------------------------|
| Detail        | This is where the data from the report query is printed. The detail will print repeatedly for each row in the report query dataset |
| Page Header   | Prints at the top of every page                                                                                                    |
| Page Footer   | Prints at the bottom of every page                                                                                                 |
| Column Header | Prints at the top of every page, underneath the Page Header and the Title band                                                     |
| Group Header  | Used to structure Detail bands into groups based on an expression or data field. A Header is at the beginning of a group.          |
| Group Footer  | Falls at the end of a group, can not exist without a Group Header to define the group                                              |
| Child         | Follows after a parent band - any band can be a parent                                                                             |
| Sub-Detail    | Displays data from a dataset linked to the report query dataset                                                                    |
| Title         | Prints on the first page of a report, after a Page Header                                                                          |
| Summary       | Prints on the last page of a report, above the Page Footer                                                                         |
| Loop          | Prints contents of band repeatedly, based on the number of times defined by the Report Writer                                      |

Notes

## Exercise 7

---

### Request

Bethany from the Registrar's office comes back to you. She likes having the text file report that you did for her but she would really like the same thing, but in a PDF. The text file is hard to read and sometimes she wants to print it out.

### Report Description

The report needs to contain the following fields:

|            |               |       |
|------------|---------------|-------|
| First Name | Street Line 1 | State |
| Last Name  | City          | Zip   |

Sort the data by Last Name, First Name and include a total count.

### Materials

- Address List DataBlock

### Prototype

### Notes

## Exercise 8

---

### Request

Bethany likes the report you just did for her but she would like to have a count of the addresses by admit type. Can you design the report to do that for her?

What do we need to call in our report to return a count of addresses? \_\_\_\_\_

\_\_\_\_\_

If we need to count by admit type it would be easier to do if we grouped the admit types together. What kind of band would allow us to group the admit types together? \_\_\_\_\_

\_\_\_\_\_

Where will we put the count by admit type? \_\_\_\_\_

How is the data currently sorted? \_\_\_\_\_

Do we need to change the sort order? And how? \_\_\_\_\_

### Materials


- Address List DataBlock
- Banded report from Exercise 7

### Prototype

### Notes

# Unit 6 Library of Objects

The Library of Objects provides a mechanism for saving objects, groups of objects and report templates. Once objects are saved in the library they be reused by yourself and others. The library also allows users to create Styles, or color themes, that be applied to banded reports.



**Best Practice:** Since users can not see objects in other user folders we recommend that a folder structure be setup so that users can easily share objects.

## Exercise 9

---

Add objects and a report template to your personal folder in the Library of Objects.

### Materials

- Address List DataBlock
- Banded report from Exercise 8 (which has branding added)

### Exercise

Using a duplicate of the banded report from Exercise 8 add objects and bands to the Library. Add a template that includes the group bands and a template that does not include the group bands.

Name of copied report: \_\_\_\_\_

## Exercise 10

---

Create a report using the template.

### Materials

- Banded template stored in the Library
- Budget Summary DataBlock or Course Schedule DataBlock

### Exercise

Create a report using the template from the library.

Notes



# Unit 7 Schedule and Delivery

## Schedule Tasks

| Schedule Task        | Description                                                                                                                                                                                                     |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bursting             | Separate report into individual reports based upon a unique identifier. Usually requires report to be grouped then the burst identifier is the same as the group identifier.                                    |
| Copy File            | Copy report to a network location.                                                                                                                                                                              |
| Delete File          | Delete a file from a network location.                                                                                                                                                                          |
| FTP File             | FTP a report to a specific destination.                                                                                                                                                                         |
| Run Application      | Execute a batch file                                                                                                                                                                                            |
| Save Execution State | Create a saved state for an OLAP cube                                                                                                                                                                           |
| Send Email           | Send report via email. If combined with bursting and the email address is included in the DataBlock report query dataset, each individual report can be sent via email. For example, email letters to students. |

Notes