



# Training Course Listing

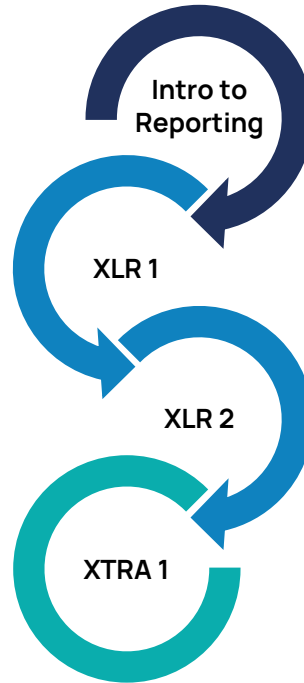
## Table of Contents

Report Training Plan .....	3
Reporting Course Length Overview .....	4
Booking & Running Courses.....	5
Introduction to Reporting.....	6
Excelerator 1.....	8
Excelerator 2 .....	10
XtraReports 1.....	12
RE & SQL 1.....	14
RESQL for ERPx .....	16
Excelerator 3 .....	18
XtraReports 2.....	20
RE & SQL 2 .....	22
Objects & Workspaces .....	24
Migration Workshop .....	26
Potential Future Courses .....	28

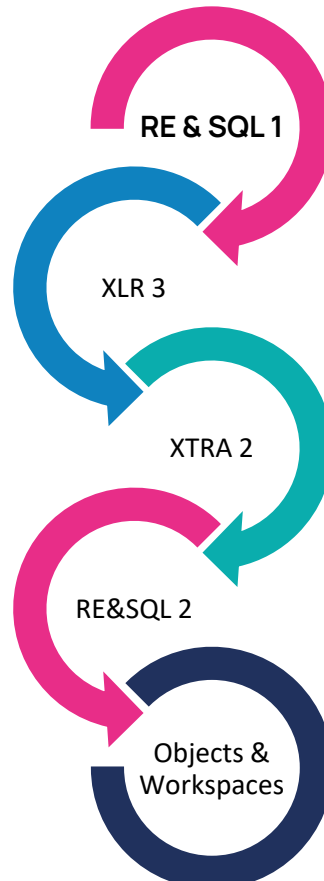
# Report Training Plan

## First Phase

The diagrams are designed to show both the learning flow and the relevant complexities of the courses.



## Second Phase



# Reporting Course Length Overview

★ These indicated course suites can be delivered for **Unit4 ERPx**.

*Note RE & SQL 1 for ERPx is one day*

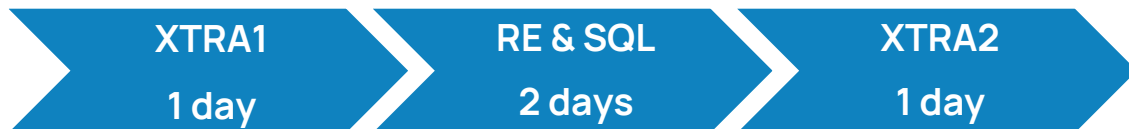
★ Introduction to Reporting



★ Excelerator Training



★ XtraReports Training



## RE & SQL



## Objects & Workspaces



## Booking & Running Courses

All courses in this booklet can be run:

- **Remotely**, run via Teams.

Following on from these courses, customers often value on-going support/workshops (**Surgery Half-Days**), as the learning is being implemented and consolidated. These can also be remote or on-site depending on your specific needs.

To book any of these courses, or for any enquiries, please get in touch at:

[elisabeth.taylor@hoopleltd.co.uk](mailto:elisabeth.taylor@hoopleltd.co.uk)

### ERPX

Many of these reporting courses can be run on both ERP and ERPx, please see previous page for details.

Please note, RE & SQL 1 for ERPx, is one day.

### Please Remember

Every effort has been made to supply complete and accurate information, however the information in this document is subject to change and update without notice. Hoople Limited assumes no responsibility for any errors that may occur in this documentation.

Microsoft® Excel, Windows® and Microsoft® SQL Server™ are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. All other brand names, product names and company logos are trademarks or registered trademarks of their respective owners.

This document contains information that is proprietary to, and considered a trade secret of, Hoople Limited. Reproduction of this documentation for any purposes is prohibited without the prior express written authorisation of Hoople Limited. All rights reserved.

# Introduction to Reporting

This is our entry-level report training course, where we are learning the available routes to viewing and manipulating data from your system.

## Reporting Basics

- Screens
- Information Browser/Client Reports
- Standard/Server Reports
- Report Engine

## Step Into Information Browser

- Simple
- Conditional Formatting
- Expressions
- Relations/Structures/Flexifields
- Restricting Data

## Graphical Representation

- Charts and Gauges

## First look at

- Excelerator
- XtraReports
- Worderator
- Existing Reports

# Introduction to Reporting

Runs as a half-day course.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- UNIT4 ERP Basics
- Financials

The course is designed for new members of staff, super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Excelerator 1
- Excelerator 2
- XtraReports 1
- RE & SQL
- Excelerator 3
- XtraReports 2
- Objects and Workspaces (under construction)

# Excelerator 1

This is our most straight-forward report-writing training course. Here we are learning to control the data on the 'page'. You will need to know a fair amount about UNIT4 ERP and to have good understanding of the basics of reporting to get the most out of this course. In order to keep the focus of the course on Excelerator commands, we only use Information Browser data. Any delegate must remember that RESQL can also be used to assemble datasets – but that is a more advanced level.

## An overview of Excelerator

- Understanding the basics of Excelerator and where it fits into the reporting family.
- When to choose Excelerator or XtraReports
- About balance tables
- Report Data
- About the Excelerator menu in Excel
- Workbook Structures
- Finding help

## Reports based on Information Browser

- The Export Button

## Simple report commands

- First keywords
- Excelerator keywords
- Augmenting a simple Excelerator report
- Reporting attributes

## Formatting your Report

- Keywords to format your report
- Source formatting keywords
- COLUMN formatting
- DataRow formatting

## Selecting Data

- Data selection restrictions
- CODE
- SUMMARY keyword
- CROSSTAB and GROUP keywords
- Importing Excelerator onto the Browser



# Excelerator 1

One day.

## Pre-Reqs & Next Steps

**Note** *this course uses Browser templates, which automatically contain Data Control. Browser templates are not the only way of writing reports.*

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- UNIT4 ERP Basics
- Financials
- Balance Tables

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Excelerator 2
- RE & SQL 1
- Excelerator 3
- RE & SQL 2

# Excelerator 2

Following on from Excelerator 1, in this course you build upon those foundations and learn how to control the structure of the 'page'. The reports which you begin to create will be highly recognisable as reports that companies use day in, day out. In addition, you learn how to generate separate tabs for values from the dataset, followed by a brief introduction to PostBack.

## Using Subtotals in reports

- Subtotalling keywords
- Simple Subtotal Reports
- DATAROW
- Multi-layered Subtotal Reports
- Additional keywords
- Multiple queries on a single tab

## Splitting reports into tabs

- BREAK for Separate Tabs
- SHEET Template Reports
- RESQL & UNIT4 ERP Attributes
- EXCEL List
- GROUP Template SHEETs

## Introduction to PostBack

## Excelerator 2

One day.

## Pre-Reqs & Next Steps

**Note** *this course uses Browser templates, which automatically contain Data Control. Browser templates are not the only way of writing reports.*

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- UNIT4 ERP Basics
- Financials
- Balance Tables

You should also have completed:

- Excelerator 1

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- RE & SQL
- Excelerator 3
- RE & SQL 2

# XtraReports 1

XtraReports is used where you have a requirement to produce a subtotaled, paginated list, with page-layout being of great importance. This is what most companies would use for Statements, BACS Remittances, Pay Slips, etc. Additionally, this renderer is sometimes referred to as DevExpress.

## What is XtraReports?

### Using a Standard Report

- Process and report names
- Viewing run reports
- Report processes
- Diagram of report process
- Creating a default report

### Formatting the report

- Making the report yours
- Repeating the Report Run
- Data Set
- XtraReports toolbars and panes
- Further details
- Amending the report
- Important structural note

### Report improvements

- Adding subtotals
- Inserting current date
- Adding page numbering
- Adding a box
- Using a cross-band box
- Having multiple bands in a group

# XtraReports 1

One day.

## Pre-Reqs & Next Steps

**Note** *this course uses Browser templates, which automatically contain Data Control. Browser templates are not the only way of writing reports.*

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- UNIT4 ERP Basics
- Financials
- Balance Tables

You may also find it advantageous, to have completed:

- Excelerator 1
- Excelerator 2

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- RE & SQL 1
- XtraReports 2
- RE & SQL 2

# RE & SQL 1

RESQL is the central point of all the reporting courses – the point where you learn to have full control over the data in your reporting dataset. In order to embrace the full power of RESQL, the course begins by teaching (or revising) the necessary parts of SQL.

RESQL uses a combination of Report Engine commands, standard SQL and agr\_macros. In addition, you will learn further useful parts of the UNIT4 ERP, which can aid report writing.

## Introduction

- ASQL
- Report Studio
- RESQL and SQL

## Running Simple SQL

### Queries

- SELECT statements
- Aggregation & GROUP BY
- HAVING

## Know the Database

- Overview
- Standard UNIT4 ERP Tables
- Finding Columns
- Navigating
- Table Definitions

## Unions & Joins

- Union
- Joins
- Relations

## Report Studio

- Xtra/XLR
- User Interface
- Amending the RESQL
- Multiple SQL
- .loop / .group / .addrow
- UNIT4 ERP Specific macros
- Report on a Screen
- Temporary Tables in Report Studio

## Database Views

- View Balance Tables
- Data Control

# RE & SQL 1

Two days.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Excelerator 1
- Excelerator 2
- XtraReports 1

The course is designed for super users, advanced users, end users, and enquiry users, plus you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Excelerator 3
- Xtra Reports 2
- RE & SQL 2

# RESQL for ERPx

This maintains many similarities with the RE & SQL 1 course above, but, due to the nature of ERPx, it is shorter. This course is only suitable for those customers who are implementing ERPx.

RESQL is the central point of all the reporting courses – the point where you learn to have full control over the data in your reporting dataset. In order to embrace the full power of RESQL, the course begins by teaching (or revising, on the shorter course) the necessary parts of SQL.

RESQL uses a combination of Report Engine commands, standard SQL and agr\_macros. In addition, you will learn further useful parts of the UNIT4 ERP, which can aid report writing.

## Introduction

### Queries

- Ways of gathering data
- Ways of extracting to Report Studio

### Know the Structure

- System Reports
- The database

### RESQL Basics

- User Interface
- Amending the RESQL
- Multiple SQL



# RESQL for ERPx

One day.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Excelerator 1
- Excelerator 2
- XtraReports 1

The course is designed for super users, advanced users, end users, and enquiry users, plus you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Excelerator 3
- Xtra Reports 2

# Excelerator 3

This is currently the final course in the report development process. It covers some of the powerful parts of RESQL and Excelerator, which are sometimes overlooked. Excel and Excelerator are powerful tools and this course teaches you several key points to bring out the best of both of them.

If you do not know what the tools are in your toolbox, how can you make informed decisions about how to use them?

## Totals with Hidden Rows

- Revising vital keywords
- Excelerator Absolute Cells
- EBITDA

## Preparameters

- Flexible Reporting/Load time changes
- Identification of change need
- Implementation of column changes
- Combining Power Parameters and Pre-parameters

## Single Row Queries

- Header and Footer Information
- When to use Single Row Queries
- RESQL Power Parameters
- Deriving values
- The power of the .set

## Dynamic Charts

- Using your dataset
- Setting the charting area

## Excelerator 3

One day.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Excelerator 1
- Excelerator 2
- RE & SQL 1

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- RE & SQL 2
- Workshops to fully embed and enhance the learning from this course.

# XtraReports 2

In order to grasp the full power of XtraReports, you really need to control of the page and the elements within that. There are certain areas of RESQL, which come into their own strengths, as you see how to use them in context and association with the report – the end result.

Following on from this, some customers find it beneficial to book remote workshop days or half days, so that delegates have someone to ask, when all those questions start to pop up!

## Reporting Structure

### Advanced Formulae

- Selecting Data
- Showing and hiding

### Using Document Archive

- Inserting an image
- Selecting an Image

### Expanding the Dataset

- Using agr\_macros
- Address Formatting
- Additional data

### Sub-reports

- Adding Sub-reports
- Connecting in Sub-reports

### Additional Pages

- Adding a Terms and Condition page

# XtraReport 2

One day.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- XtraReports 1
- RE & SQL

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- RE & SQL 2
- Workshops to fully embed and enhance the learning from this course.

## RE & SQL 2

In RE & SQL 1 you will have learnt the power of some of the data-collection code that is available to you.

Once you have learnt the basics of how to gather your data and the various methods available to you, you can start to add in some coding elegance – which often equates to speed.

It's worth noting, that the Unit4 ERP database is very flexible in its implementation, table indices etc. so there may be different methods that are needed to gather the data in a timely fashion, on different sites. The aim is to teach you the tools in your toolbox, so that you are prepared for however your database flows!

### Recap

- Build a standard report.

### Elegant Constructs

- Take existing constructs and reduce the code.

### Single Row Queries

- Simple coding, powerful results.

### Parameters

- Standard parameters
- Server parameters
- Period parameters
- Calculated parameters.

### Splitting

- History
- Split to file
- Document Archive
- Email.

## RE & SQL 2

One day.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Excelerator
- XtraReports
- RE & SQL 1

The course is designed for super users, advanced users, end users, and enquiry users, plus you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Half-day report surgeries

# Objects & Workspaces

User-defined Objects are a collection of properties assembled from a single table. They are customised entities, based on data tables, which behave similarly to system objects. These are used, in the main, by Information Browser reports.

By combining their use with User-defined views, you can create a unique response to your company's need.

Workspace is a new Experience Pack for MS7, which allows users to setup a reporting dashboard, viewing reports, graphs and key performance indicators, at a glance. Workspaces can be set up for differing roles within a company.

## Cache

- The importance of a clear cache.

## Views

- Generation and use.

## Table Definitions

- Relevance and use.

## Objects

- Creating the layer to use the view.

## Using Objects

- Building reports.

## Workspace Dashboard

- Generating a new dashboard.

## Landing Page

- Setting this for a user or a role.



# Objects & Workspaces

One day.

This can be run as a half day, for those sites who do not have Workspace.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Excelerator
- XtraReports
- RE & SQL 1
- RE & SQL 2

The course is designed for super users, advanced users, end users, and enquiry users, plus you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Workshops to fully embed and enhance the learning from this course.

# Migration Workshop

Quite simply, if you already know all about reporting with U4BW and you can get Excelerator and/or XtraReports to spin on the spot and you know the fundamentals of RE&SQL, but you **don't** how to change your reports into Report Engine 9-styled reports, then this is the course for you.

The course is workshop in its style and goes fairly fast - building upon the knowledge you already have. You will learn the Process Flow, with potential variations; how the database, dataset and tables work together to render the report; and you will migrate one report plus have the chance to start to migrate one or two of your own.

Following on from this, some customers find it beneficial to book remote workshop days or half days, so that delegates have someone to ask, when all those questions start to pop up!

## Laying out the Process Flow

- Best practice order of events
- Anticipating issues.

## Take a simple report...

- Amending a Simple Report
- Considerations of single row queries and parameters.

## SQL Structures

- Considering Improvements in structure and syntax:
- Parent and child structures
- Temporary tables
- Sub-reports.

## Migrating and Fixing

- Migrate the report
- Fix the output.

## Start One of Your Own

Following on from your learning, you will have the chance to start, and possibly to complete, one or two of your own reports.

# Migration Workshop

One day.

## Pre-Reqs & Next Steps

### Pre-Requisites

Before starting this course, you should have an understanding of, or a competence in:

- Relevant Reporting courses, Report Engine version 8
- RE & SQL Course, Report Engine version 9

The course is designed for super users, advanced users, end users, and enquiry users, and you should be familiar with using and working in a Microsoft Windows environment.

### Next Steps

A natural progression from this course, would be:

- Workshops to fully embed and enhance the learning from this course
- Remote support time to answer any further questions

## Potential Future Courses

### Worderator

- Choosing Worderator or Mail Merge style
- Using Word commands
- Using the Worderator Dataset
- Structuring

If any of the above interest you, please contact one of our team to join the list of course contacts. The more people who ask for a certain course, the more quickly it will be developed!

To add your name to the **interested list** for any of these courses, or for any other enquiries, please get in touch at:

[elisabeth.taylor@hoopleltd.co.uk](mailto:elisabeth.taylor@hoopleltd.co.uk)