

# *EspressReport* v4.0.2 Training Course Outline

This is a topical outline illustrating subjects covered in the standard 2-day EspressReport training course. This course is focused towards users who will be designing/creating reports and charts. It will introduce them to the query and layout tools in EspressReport, and cover many of the chart and report design features. Each subject will include portions of lecture, demonstrations and hands-on exercises. Topics in the outline can be adjusted to suit the trainees needs.

## I. “Welcome to EspressReport” – Introduction and overview

- A. Introduction to EspressManager
  - i. Start EspressManager
  - ii. EspressManager configuration options
- B. Start Report Designer

## II. “Making Connections” – Getting report data

- A. Database Connections
  - i. Set-up ODBC connection (via bridge), Set-up JDBC connection
  - ii. Developing Queries
    - a. Create a query using Query Builder
    - b. Type an SQL statement
    - c. Execute a stored procedure
    - d. Query parameters
      - 1. Create a parameterized query
      - 2. Create a parameterized query with multi-value parameter
    - e. Working with Data Views
      - 1. Create a Data View
      - 2. Running Data Views
      - 3. Data View Advanced features
- B. Data from XML Files
  - i. Set-Up and Query XML data source
- C. Data from text files - text file format requirements
  - i. Create and set-up a text file data source
- D. Other data sources - not in detail

## III. “Layouts and More” – Report Wizard options and data mapping

- A. Report types and data structures
  - i. Data mapping options
  - ii. Map one of each report type
- B. Additional pre-formatting options
- C. Modifying data source and report mapping options

## IV. “The Design Environment” – Looking at Report Designer

- A. Report Designer Basics – basic controls
  - i. Report Sections
    - a. Adding nested sections
    - b. Test/experiment with section options
- B. Manipulating report cells
  - i. Moving/sizing individual cells
  - ii. Moving/sizing groups of cells
  - iii. Alignment options
    - a. Snap to grid and grid sizing
    - b. Group alignment
    - c. Guidelines

**V. “Report Elements” – Working with different types of report objects**

- A. Different types of report elements (labels, headers, column fields, formulas, etc.)
  - i. Adding new report elements
  - ii. Modifying element attributes
    - a. Modifying groups of objects
    - b. Using global formatting
  - iii. Modifying data display
    - a. Formatting for different data types
    - b. Formatting null data

**VI. “Compute It” – Working with formulas and scripts**

- A. Formula basics
  - i. Formula elements
  - ii. Create and add formulas, computed columns, and aggregations to reports
- B. Scripting concepts
  - i. Script elements/properties
  - ii. Developing and applying scripts
  - iii. Advanced concepts in scripting and section scripts

**VII. “Visualize It” – Working with charts and the Chart Designer**

- A. Inserting charts/data options
  - i. Using Report Data
  - ii. Using independent data (Deployment concerns)
- B. Chart types and data mapping
  - i. Introduction to charting elements terminology
  - ii. Basic mapping concepts
  - iii. Descriptions/mapping for each chart type
- C. Chart elements
  - i. Adding new chart elements
  - ii. Element properties/modifying elements
  - iii. Chart axis options
- D. Advanced Charting features
- E. Charts in reports

**VIII. “Advanced Concepts” – Looking at advanced reporting features**

- A. Using rich text fields

- i. Using a columnar layout
    - ii. Using formulas and column fields
  - B. Sub-reports
    - i. Sub-report concepts
    - ii. Adding/removing sub-reports
    - iii. Linked sub-reports and parameter sharing
  - C. Drill down
    - i. Drill down introduction and concepts
    - ii. Create drill down reports

**IX. “Secure It” – Security concepts in EspressoReport**

- A. Report security
  - i. Security level concepts
  - ii. Applying security levels in reports

**X. “Schedule It” – Using the scheduler**

- A. Schedule a report
  - i. Email delivery
- B. Command line scheduling

**XI. “Putting it Together” – Final exercises**

A series of final exercises in which students apply what they have learned by trying to re-create specific reports presented to them visually.