

Report Developer Functionality Training

Release 3.0 of Lexis Affinity Library comes with the launch of advanced report development, allowing your firm to take ownership of your data and gain further insight into how you are tracking.

The Basics Course- learning outcomes

Why the new reports?

Improvements of new reports over old

Running Reports

Identify the various types of reports (Classic, Standard, etc.)

Filter reports

Jumping to the appropriate report

Select appropriate criteria for the report

Select appropriate options for the report

Understand the concept of grouping

Apply the various grouping options to a report

Apply run-time filters

Export Data

Print a report

Find text in the report

Apply a watermark

Export a report in a variety of formats

Email a report in a variety of formats

Locate the generic features common to each report

Load report updates when released by LexisNexis

Creating/Modifying Report Designs

Differentiate between a schema and a report design

Select an appropriate schema when creating a report design

Identify the impact schema choice has on the report development process

Understand the options available on the Report Design Maintenance screen

Appreciate the pros/cons of using the report wizard to create a report

Make useful selections from the report wizards, incl. Grouping & Layout

Report Designer Navigation

Undoing changes

Hiding/showing windows

Docking/undocking windows

Pinning windows

Preview a report design

Controls

Define the term 'control' in the context of report design

Identify the most useful controls to use

Add controls to the report design

Change font and colour options of labels

Use > Tasks to adjust common control settings

Change Format String options

Use the Property Grid to manipulate a complete list of settings for a report or control

Understand the major styles and what they look like

Use Alignment and Layout options

Add a logo to a report

Bands and Groups

Understand how each band is replicated when a report is produced

Add a group at the report design level

Insert/remove bands

Fields

Adding fields to a report

Adding summary fields (e.g. sum, max, count) to a report footer, or group footer

Save a report design

Adding/Editing Reports

Appreciate the need to add a report after creating a report design

Enter name, description, type, classification, path

Select a report schema

Understand the impact of 'Allow run time grouping'

Apply appropriate security permissions to reports

Creating/Modifying Schemas

Selecting an appropriate super schema

Selecting fields to include

Including DataForm fields in schema

Including basic calculated fields in schema (i.e. adding and subtracting fields)

Defining default schema field sorting

Defining groups at schema level

Setting filters at schema level

Defining run-time parameters

Using run-time parameters in filters

Defining which filters are available to the end user

Setting the order in which parameters appear to the end user

Activity: Create a report from scratch, including schema

Dashboards

Using Dashboards

The Advanced Course- learning outcomes

Charts

Dashboards

Creating Dashboards

Pivot Grids

Scripting

Advanced Schemas

DataSet Links when using multiple superschemas

SQL statements in calculated fields

Include summary data

Advanced Report Designs

Groups within groups [move to introductory?]

Customising behaviour of 'Suppress zero balances' on report criteria

Customising behaviour of 'Hide detail' on report options
Customising behaviour of 'Drill down' on report options
Customising behaviour of 'Word wrap' on report options

The following formats for training are available

On Site

The Consultant will deliver training on site in your firm environment. Training can commence at a time and date convenient to you, subject to availability. The course will run for two days, but can be split into 1 day increments, no further than 8 weeks apart. There is no maximum number of attendees.

Benefits: The course delivery can be specific to your firm and focus on key reporting areas based on your firms objectives. Training can be delivered at a time and date that best suits you. On Site is more cost effective if multiple colleagues are required to receive training as costs are per day, not per person.

Off Site

Training will be delivered at a location specified by LexisNexis and the training will commence at dates and time specified by LexisNexis. The training sessions will be held over 2 days with a maximum of 20 people per class.

Benefits: There will be fewer distractions for you while you are away from the office environment. This is a cost effective way for firms wishing to train 1 or 2 users and it gives you a chance to network with other firms also attending the course.

The report developer training course prices

To ensure all users are given the appropriate training on the 'Report Developer' you will be required to purchase a certificate enabling you to acquire the necessary skills to develop and build your own reports.

The report developer tool is complex and requires specialist knowledge in data tables and schema building. The functionality and features of the report developer are free, however to ensure that users make the most out of the tool, 2 days training is the minimum required training needed to familiarise and handle this new functionality.

FAQ's

How do I book the Report Developer course?

1. Customers can request for the course as part of their upgrade to Affinity 3.0 by filling out the Upgrade request Form within the LexisCare Service centre
<http://service.locus.com.au/HelpLine/jsp/Client/Login.jsp>
2. Customers can use the Time and Material Professional Services web page to specify Report Developer training.
<https://www.lexisnexis.com.au/aus/professional-services/>

What does it mean to receive a certificate for the Report Developer course?

We have associated the Report Developer course with a certification which means that when you complete the course we will flag on your customer account that you are now a certified user of the Report Developer. This allows us to identify your training level when you place a helpline call, and

establish whether there is a need for further consulting/training, and whether we need to make further content amendments to the report developer course to ensure if a sufficient level of understanding and competency has been delivered.

Will the Report Developer course be available in online format at some stage?

Not at present but we may look at providing follow up/refresher type courses in this format. The reason why the report developer course is delivered in a classroom environment is due to its length and complexity. It also requires a great deal of workshop and hands on training which only works when in a face to face environment with a trainer.