Reports Training

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Company:_____ **Signed**:_____

Name:_____ **Position**:_____ **Date**: _____

Trainee to complete: Please tick

1. [   ] **Report Types**
   Do you know what the two types of reports are?

2. [   ] **Report Selector**
   Do you know what the Report Selector is and how to access it?

3. [   ] **SQL Writer**
   Do you know what the SQL writer is and how to access it?

4. [   ] **Radio Buttons**
   Do you Understand what the labelled radio buttons on the left hand side of the Report Selector are for?

5. [   ] **Date Ranges**
   Do you understand what the date ranges are for on the main Report Selector?

6. [   ] **Default Date Range**
   Do you understand where to set the default date range?

7. [   ] **F5, F6 and F7**
   Do you know how to use the F5,F6,F7 searching features? Also how to use the search box on the main screen.

8. [   ] **Drillable Reports**
   Can you drill into the transactions on these types of reports and lists?

9. [   ] **Printable Reports**
   Do you know how to get an average, max, min or sum of a column in a printable report?

10.[   ] **Customisation**
   Can you customise the appearance of drillable/printable reports generated from the lists.
   Sales Order List, Invoice List, Purchase Orders List, etc?

11.[   ] **My Reports**
   Do you know how to create a report in the "My Reports" area from this customised report?

12.[   ] **Average, Max etc**
   Can you adust the total from "Sum" to "Average"?

13.[   ] **Learn Report Builder**
   Can you find the Report builder manual?

14.[   ] **Batches**

Why do we recommend that you have this function turned on?

15.[   ] **Update Batch**
Where do run this function from?

16.[   ] **Speed v Functionality**
Why do you lose speed when you gain functionality?

17.[   ] **Charts**
Do you know how to create a chart from any report?

18.[   ] **SQL Writer**
Do you know how to use the SQL writer to create custom templates?

19.[   ] **Easy Copy**
Where do you copy ready made SQL strings?

20.[   ] **New SQL Report**
Can you use the SQL wizard to create a report?

21.[   ] **View Toolbars**
Have you turned on all of the tool bars for the SQL design screen?

Notes:
Are there any aspects in this area that more training would be useful?

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