

Basic Report Writer Course Catalogue

Course Overview

This course provides a comprehensive overview of the Basic Report Writer functionality with a focus on gaining hands on practical experience in the use of the Report Writer. We will include coverage of both Power and Gas Reporting. Trainees will design and create basic reports and gain familiarity with the commonly utilised report columns. They will be introduced to various techniques, which will enable rapid report design. Using filter, sort and grouping functionality we will demonstrate how the Report Writer efficiently captures data and presents it in a clear and concise format. Trainees will create summary, monthly, daily and sub-daily granularity reports and output in various formats including Crystal, Excel, DynamiCube and HTML.

Throughout the course we will highlight common problems that can occur and investigate ways to solve these problems.

At the end of this two day course delegates will be able to confidently create well designed, efficient basic reports.

Who Should Attend

Anyone who needs to specify, design, create, run, or amend reports as part of their role including:

- **Front Office** e.g. to enable traders to see the effect of their trade on volumetric position.
- **Middle Office** e.g. identify deals that require production of a confirmation.
- **Back Office:** e.g. produce a Power Schedule for generation.
- **System Administrators** e.g. To gain better general understanding of product to provide support.
- **Managers:** to gain an understanding of the potential use of Report Writer.

Prerequisite

Person should have a general understanding of the Energy Trade Blotter application.

Cost

2 days training - £1900 (discount any additional person - £1600)
The course includes - Training materials and hand out exercises
Lunch

Location

London – Canary Wharf

After completing this course, you should be able to

- Understand PET, PETDAILY and PETEXP views
- Design and specify the layout of a new report
- Create, amend, copy and delete reports
- Understand efficient filtering techniques
- Set up filters on a report e.g. filter on various deals
- Understand the use of OHM filter in ZaiNet auditing
- Create sorted reports e.g. sort on Counterparty and book
- Use group functions to include calculated columns within a report e.g. weighted average price
- Use Global report columns e.g. IF, STRING, TOTAL, MATH, etc
- Understand the use of common parametric columns e.g. VALUE FUNC
- Output report in various formats
- Identify and solve common problems

Duration

2 day

Methodology

Interactive instruction with plenty of simulated exercises to tackle real life issues

Course Agenda

Day 1

Introduction to what is Report Writer and how it interacts with ZaiNet database
 Create a simple report using PET view taking into account Power and Gas trades
 Learn a common list of columns and filters
 Learn conditional operators for filters
 Learn about smart filters
 Learn about the order of the filters and how to speed up report performances
 Learn parametric report columns
 Learn global report columns

Day 2

Create report in PETEXP view
 Learn commonly used columns for PETEXP view
 Create report in PETDAILY view
 Learn commonly used columns for PETDAILY view
 Learn different outputs in PETDAILY view: sub daily mode, Split/normal mode
 Run reports and output formats in Crystal, HTML, DCube

Follow on courses

Having completed this course the following courses are available to you:

Advanced Report Writer
Introduction to ZaiNet Analytics