

Class Summary

This custom Crystal Report course is designed to teach the fundamentals of report design using your company data. The course is broken up into several days of training to demonstrate/train functionality and processes involved in Crystal Report development.

Workbooks (training manuals) will be provided at no charge.

Pre-Requisites

- Familiar with Database concepts
 - Able to navigate in a windows environment
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DAY 1

Reporting Basics – Data Connection, Design, Sorting, Filtering and Grouping

▶ Reporting Requirements

- *Determining the Layout of the Report*

▶ Report Design

- *Starting the Crystal Reports Program*
- *Starting a New Report*
- *Choosing a Data Source Finding the Data*
- *Finding the data*
- *Organizing the Data for the Report*
- *The Main Components of the Design Window*
- *Exploring the Toolbars*
- *Using Explorers*
- *Placing Fields on the Report*
- *Selecting and Sizing Objects*
- *Browsing Field Data*
- *Moving and Aligning Objects*
- *Using Guides and Guidelines to Move and Align Objects*
- *Creating Text Objects*
- *Previewing the Report*
- *Refreshing the Data*
- *Getting Help*

▶ Formatting Features

- *Quick Formatting with the Template Expert*
- *Formatting Objects*
- *Inserting Lines and Boxes*
- *Drawing a Line*
- *Drawing a Box*

▶ Formatting Features - continued

- *Inserting Graphics*
- *Working with the Page Commands*
- *Changing Page Orientation*
- *Changing Margins*
- *Working with Text Objects*
- *Adding Fields into a Text Object*
- *Formatting Part or All of an Object*
- *Inserting Special Fields*

▶ Sorting Records (Record Sort Expert)

- *Sorting Data with the Record Sort Expert*

▶ Filter Records (Select Expert)

- *Filtering Data with the Select Expert*
- *Selecting Records with Multiple Criteria*
- *Viewing and Editing the Select Formula*
- *Case Sensitive vs. Case Insensitive*
- *Record Selection Formula Templates*

▶ Grouping and Sorting Data

- *When and Why to Group Records*
- *Creating a Group*
- *Group and Sort Direction*
- *Customize Group Name Field*
- *Creating Multiple Groups in a Report*
- *Using the Group Tree to Navigate*

DAY 2

**Data Link Basics, Formulas, Parameters,
Advance Grouping**

▶ Combining Multiple Tables

- *Understanding Tables, Records, and Fields*
- *Learning About Linking*
- *Adding Multiple Tables to a Report*
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▶ Creating and Using Formulas

- *Understanding Crystal Formula Syntax without Being a Programmer*
- *About the Formula Workshop*
- *Using the Formula Workshop*
- *Using the Formula Editor*
- *The Formula Editor Toolbar*
- *Performing Simple Number Calculations*
- *Conditional Formatting*
- *The Highlighting Expert*
- *Setting Highlighting Priorities*
- *Conditionally Formatting Fields*

▶ Parameters

- *Automate Date Ranges*
- *Allow dynamic selection of data*
- *Cascading Parameters*

▶ Advanced Grouping

- *Customized Group Name*
- *Group in a Specified Order*
Reordering Groups

- *Summarizing Groups*
- *Additional Summary Options*
- *Group in a Specified Order defining your own Group Name*
- *Drill Down Grouping Techniques*
- *Drill Down Conditional Formatting Techniques*
- *Summary Reports with Drill Down*

DAY 3

**Section Expert, Advance Formulas, Running
Totals, Sub-Reports**

▶ Section Expert

- *Use Multiple Sections in Reports*
- *Use the Section Expert to Work with Sections*
- *Conditionally Formatting Multiple Sections*
- *Creating a multiple Column Report*
- *Hands on Exercises*

▶ Running Totals

- *Understanding Running Totals*
- *Creating Cumulative Running Totals*
- *Formula Based Running Totals*

▶ Advanced Formula Features

- *Pass Logic*
- *Evaluation Time Functions*
- *Work with Variables*
- *Declaring Variables*
- *Assign values to a Variable*
- *Using variables in Formulas*
- *Understand Variable Scopes*

▶ Sub Reports

- *Why use Sub reports?*
- *Unlinked Sub reports*
- *Linked Sub reports*
- *On-Demand Sub reports*

▶ and more - time permitting . . .