

Course Overview

In this 2-day course, you will learn the essentials of creating reports in Crystal Reports for versions 2008, XI, 10 and 9. Following an overview of the Crystal Reports environment, you will learn how to create reports. This will include choosing the data source, placing fields on the report, selecting and sizing objects, browsing field data, moving and aligning objects, creating text objects, saving a report, previewing a report, and refreshing the data. You will also learn how to format reports. This will include formatting objects, drawing lines and boxes, inserting graphics, working with page commands, adding fields into a text object and inserting special fields. You will also learn how to select specific records from the database using filtering techniques on text, numbers or dates. In addition, you will learn how to group and sort data for reporting purposes, including how to create multiple groups in a report, and count or summarize data by each group. You will learn how to group data in date/time intervals, calculate percentages and order groups based on their summary data. In addition, you will learn how to combine multiple tables using linking and how to create and use number, date, and string formulas. You will learn how to use conditional formatting to emphasis certain data and how to set page breaks for each group. You will learn how to create summary reports that consolidate data. With summary reports, you will learn how to create charts. Finally, you will learn how to export data to Excel, set defaults options and how to use the report wizards.

Courses in the Crystal Reports Series

Crystal Reports Level 1
- 2 days -

Crystal Reports Level 2
2 days -

Course Preparation

Microsoft Windows - Level 1 or equivalent experience. Level 1 course of any database application *or equivalent experience* helpful. Experience would be in creating reports or queries from databases, and understanding basic relationship database terms, such as table, fields and records. Those who currently create reports from Excel lists or SQL Queries will also qualify for this course.

Course Topics

Getting Started

- Defining the Purpose of the Report
- Determining the Layout of the Report
- Finding the Data
- Organizing the Data for the Report

Creating a Simple Report

- Starting a New Report
- Choosing a Data Source
- The Main Components of the Design Window
- Exploring the Toolbars
- Managing the Resources with 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
- Saving the Report
- Autosaving the Report
- Previewing the Report
- Refreshing the Data

Formatting Features

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

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Selecting Specific Records from the Database

- Filtering Data with the Select Expert
- Selecting Records with Multiple Criteria
- Viewing and Editing the Select Formula
- Using Numeric and Date Ranges
- Using Text Fields for Filtering
- Case Sensitive vs. Case Insensitive Searches
- Benefits of Filtering the Report with Large Databases

Grouping and Sorting Data for Summary Purposes

- When and Why to Group Records
- Creating a Group
- Group and Sort Direction
- Customize Group Name Field
- Modifying Groups
- Creating Multiple Groups in a Report
- Using the Group Tree to Navigate the Report
- Reordering Groups
- Summarizing Groups
- Additional Summary Options
- Grouping Data in Date/Time Intervals
- Calculating Percentages off a Grand Total
- Locating the Top or Bottom N in a Group

Combining Multiple Tables

- Understanding Tables, Records and Fields
- Adding Multiple Tables to a Report
- Crystal Reports AutoLinking Features
- Locating Key Fields Using Crystal Reports
- Inner Joins Between Multiple Tables
- Outer Joins With Two Tables
- Reports Using One to Many Relationships
- Reports Using One to One Relationships

Creating and Using Formulas

- Understanding Crystal Formula Syntax
- Creating Calculated Fields
- Using the Formula Editor
- Performing Simple Number Calculations
- Performing Date Calculations
- Manipulating Dates with Functions
- Creating Boolean (True/False) Formulas
- Using IF statements to test for Nulls
- Creating String Formulas
- Using Bookmarks to Navigate Through Formulas

Conditional Formatting

- Highlighting Data on the Report Based on Tests
- Formatting Sections for Page Breaks
- Adjusting Sections Conditionally
- Conditionally Formatting Fields

Creating Summary Reports and Charts

- Creating a Summary Report to Hide Details
- Applying the Drill Down Feature
- Producing Charts
- Editing Charts
- Formatting Charts
- Using the General Chart Options
- Using Auto-Arrange Chart
- Applying Chart Templates

Exporting Report Results within your Organization

- Understanding Export Formats and Destinations
- Exporting to Excel
- Exporting to a Report Definition Format

Setting Default and Report Options

- Setting the Default Layout for Design and Preview Views
- Setting up Format Preferences

Using the Report Wizards

- What are the Report Wizards?
- Create a Report using the Standard Report Creation Wizard or the Label Wizard

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