

Class Summary

This 3 day course is designed to teach the fundamentals of report design, intermediate to advance techniques needed to develop more complex reports.

Hands on exercises are used to teach all the techniques needed to learn the basics of report design and to teach all the techniques needed to develop more complex reports.

Pre-Requisites

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

Report Design and Common Techniques - Day One

▶ **Getting Started**

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

▶ **Report Design**

- *Starting the Crystal Reports Program*
- *Starting a New Report*
- *Choosing a Data Source*
- *The Main Components of the Design Window*
- *Exploring the Toolbars*
- *Managing 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*
- *Auto-saving the Report*
- *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*

▶ **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*
- *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*
- *Ordering Groups Based on Their Subtotals Using the Group Sort Expert*

▶ Grouping and Sorting Data - continued

- Challenge Exercise - Grouping, Sorting, Summarizing

▶ Combining Multiple Tables

- Understanding Tables, Records, and Fields
- Learning About Linking
- Adding Multiple Tables to a Report
- Challenge Exercise - Using the Database Expert to Link Tables

▶ 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
- Manipulating Dates with Formulas
- Creating Boolean (True/False) Formulas
- Creating String Formulas
- Using Bookmarks to Navigate Through Formulas
- Challenge Exercise - Creating String Formulas
- Conditional Formatting
- The Highlighting Expert
- Setting Highlighting Priorities
- Formatting Sections
- Formatting Sections Conditionally
- Conditionally Formatting Fields
- Challenge Exercise - Section Formatting and Conditional Formatting

Advanced Training - Day Two/Three

▶ Advanced Parameters

- Control Sort Order with Groups
- Control Record Selection
- Cascading Parameters
- Hands on Exercises showing all the advance parameters

▶ Advanced Grouping

- Customized Group Name
- Group in a Specified Order

▶ Advanced Grouping - continued

- Group in a Specified Order defining your own Group Name
- Hierarchical Grouping Techniques
- Drill Down Grouping Techniques
- Drill Down Conditional Formatting Techniques
- Summary Reports with Drill Down
- New Group on a new page
- Reset Page numbers on new Groups
- Hands on Exercises showing all the advance Grouping techniques

▶ 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
- Hands on Exercises

▶ 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
- Working with Arrays

▶ Sub Reports

- Why use Sub reports?
- Unlinked Sub reports
- Linked Sub reports
- On-Demand Sub reports
- Hands on Exercises

- ▶ Cross-Tab Reports
 - *Cross-Tabs Overview*
 - *Create a Cross-Tab Report*
 - *Create a Cross-Tab with Multiple Rows or Columns*
 - *Formatting Style to the Cross-Tab*
 - *Customizing the Cross-Tab Format*
 - *Suppressing Empty Row/Columns*
 - *Repeating Row Headings for Multiple Pages*
 - *Using Alias Names for Row/Columns*
- ▶ Advanced Grouping
 - *Conditional Formatting for Row/Columns using Alias Names*
 - *Group Sort Experts*
 - *Hands on Exercises*
- ▶ Custom Functions
 - *Why use Custom Functions?*
 - *Creating a Custom Function*
 - *Saving to Repository*
- ▶ Creating Form Letters
 - *Layout Reports to merge with data fields*
 - *Learn several techniques to format a report to produce one or more pages that relate to one source*
 - *Learn to force Crystal to start a new page with a new source so you can distribute form letters separately.*
- ▶ Mailing Labels
 - *Use the report wizard to create Avery style or popular labels.*
 - *Learn how to create label formulas to concatenate address*
 - *Learn how to customize label specifications*
- ▶ Set Data Source Locations
 - *Learn how to point your database or tables to a new database or tables*
- ▶ SQL Commands
 - *Learn how to create your own SQL statements in Crystal.*
 - *Learn the Repository - how to add/edit/rename your SQL commands*
- ▶ Section Expert
 - *See how to create reports with alternating colors*
 - *Learn how to design multiple column reports*