

Class Summary

This 1-day Quick Start course is designed to teach the basic fundamentals of report design such as sorting records, filtering data, grouping, writing simple formulas and providing automated summary totals.

Hands on exercises are used to teach the techniques of report design and techniques needed to maintain existing reports.

Pre-Requisites

- No previous experience working with Crystal Reports needed.
 - Able to navigate in a windows environment.
 - Familiarity with database tables, fields and records is a plus.
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▶ 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*
- *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 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*
- *Ordering Groups Based on Their Subtotals Using the Group Sort Expert*
- *Challenge Exercise - Grouping, Sorting, Summarizing*

▶ 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*
- *The Highlighting Expert*
- *Setting Highlighting Priorities*

▶ Exporting Report Results

- *Understanding Export Formats and Destinations*
- *Using an HTML Format for Crystal Reports*
- *Exporting to Windows Applications*
- *Exporting to a Report Definition Format*

▶ Setting Default and Report Options

- *Setting the Default Layout for Design and Preview Views*

▶ and more