COURSE SUMMARY

This 1-day Beginner course is designed to teach the fundamentals of report design such as:

- sorting records,
- filtering data,
- grouping data,
- developing drill-down reporting and
- using automated summary totals (e.g., sum, count, average)

The student will develop **7** Reports using these techniques along with other course topics listed below.

COURSE PREREQUISTIES

- No previous experience working with Crystal Reports needed.
- Able to navigate in a windows environment.
- Familiarity with database tables, fields and records are a plus.

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*

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*

Aligning and Sizing

- *Learn how to align columns and rows on your report*
- *Provide perfect centering*
- *Keep columns and rows adjusted to the same size, height or width*

Filter Records (Select Expert)

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

Grouping/Sorting Data

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

Drill Down Reporting

- *See how drill down reporting allows you to separate a group as an independent report*
- *Allows end-users to navigate to a specific group using the group tree list*

Section Expert

- *Learn how the section expert allows you to stack data in a column*
- *Duplicate section functionality on a report*

Using Summary Features

- *Use the insert summary feature of Crystal Reports to sum, count, distinct count, average, etc.*
- *See how a summary feature is used to create and maintain sub-totals*
- *Summary features used at header and footer levels of a group*

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*
- *Providing drill down capability*
- *Setting Autosave feature of reports*
- *Maintain consistent fonts, field headings, etc. in report design*
- *Show table data in alphabetical order*