

## COURSE SUMMARY

This 2-day Beginner/Intermediate course is designed to teach 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)
- using **multiple tables** and learning how to link data,
- writing **basic** and **intermediate formulas,**
- using **parameters** that prompt the user to filter data (e.g. Date Ranges),
- **exporting** results to various formats

The student will develop **13** Reports using these techniques along with other course topics listed below.

## COURSE PREREQUISITIES

- 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*

### Combining Multiple Tables

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

### 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*

### Grouping and Sorting Data

- *When and Why to Group Records*
- *Creating a Group*
- *Group and Sort Direction*
- *Modifying Groups*
- *Using the Group Tree to Navigate the Report*
- *Summarizing Groups*

### Creating and Using Intermediate Formulas

- *Performing Simple Number Calculations*
- *Using Functions to change formatting*
- *How to concatenate multiple data fields*
- *How to perform line-feeds in formulas to cause stacking data in columns*
- *Creating String Formulas*

### Conditional Formatting

- *Formatting Sections Conditionally*
- *Conditionally Formatting Fields*
- *Challenge Exercise - Section Formatting and Conditional Formatting*

### Parameters

- *Understanding Crystal static and dynamic parameters*
- *Learn how to automate from and through date ranges by using parameters*
- *Learn how to use parameters to show real time data*
- *Learn how to write conditional formulas using parameters.*

### Exporting Report Results

- *Understanding Export Formats and Destinations*
- *Export your report in a particular format such as PDF, Excel, Word, etc.*