

## **Class Summary**

This 2 day course is designed to teach the fundamentals of report design and to maintain simple to intermediate level Crystal Reports.

Hands on exercises are used to teach all the techniques needed to learn the basics 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.
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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*

### ▶ Formatting Features - continued

- *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*

- ▶ [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*
  
- ▶ [Creating Summary Reports and Charts](#)
  - *Creating a Summary Report*
  - *Applying the Drill Down Feature*
  - *Applying the DrillDownGroupLevel*
  - *Producing Charts*
  - *Editing Charts*
  - *Formatting Charts*
  - *Using the General Chart Options*
  - *Modifying Individual Objects in the Chart*
  - *Using Auto-Arrange Chart*
  - *Applying Chart Templates*
  
- ▶ [Exporting Report Results](#)
  - *Understanding Export Formats and Destinations*
  
- ▶ [Exporting Report Results - continued](#)
  - *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](#)