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 PREREQUISITES

- 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.