



Crystal Reports Designer Level 1

Course CR-01B

2 Days

Instructor-led, Hands on

Introduction

Our Crystal Reports training course uses the latest Crystal version, but if you haven't upgraded yet, all classes and courses feature work from earlier versions of Crystal Reports as well.

This two-day instructor-led course is designed for new users of Crystal Reports. Some of the topics covered include a review of the software features, report design and the creation of presentation quality reports. The course incorporates a number of hands on exercises to reinforce the learning process.

This course is appropriate for administrators, developers and end-users who need to create dynamic reports from varying data sources

At Course Completion

Upon successful completion of this course, students will be able to:

- Create a report by using data from an existing database.
- Locate and present data in a specified order.
- Create groups to summarize report data.
- Build formulas to add non-database data to a report and display data differently.
- Format reports.
- Enhance reports by adding and modifying elements in a report.
- Create single data series charts.
- Distribute report data to other users.

Prerequisites

Working knowledge of the Windows environment is required. Familiarity with relational database concepts (tables, fields and records) is strongly recommended. Students who have taken Access classes will fulfill this requirement. Familiarity with querying SQL is also recommended. Students should attend Course SQLC, "Querying SQL" or have equivalent knowledge and skills.

Course Outline

Module 1: Creating a Report

- Starting the Crystal Reports Program
- Starting a New Report
- Choosing a Data Source

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- 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
- Using the Status Bar
- Getting Help

Module 2: Formatting Features

- Quick Formatting with the Template Expert
- Using the Format Painter
- Formatting Objects
- Inserting Lines and Boxes
- 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

Module 3: Database Filters

- 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

Module 4: Report Grouping

- 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
- Using the Sort Control
- Summarizing Groups
- Additional Summary Options
- Grouping Data in Date/Time Intervals
- Calculating Percentages
- Ordering Groups Based on Their Subtotals Using the Group Sort Expert

Module 5: Multiple Tables Joins

- Understanding tables, records and fields
- Learning about linking
- Adding multiple tables to a report

Module 6: Creating 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

Module 7: Conditional Formatting

- Formatting Sections
- Formatting Sections Conditionally
- Conditionally Formatting Fields

Module 8: Creating a Summary Report

- Applying the drill down feature
- Applying the DrillDownGroupLevel
- Producing charts
- Editing charts
- Formatting charts
- Using the chart options
- Modifying individual objects in the chart
- Applying chart templates

Module 9: Exporting Reports

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

Module 10: Report Wizards

- What are the report wizards?
- Create a report using the standard report creation wizard
- The data dialog box
- The fields dialog box
- The grouping dialog box
- The summaries dialog box
- The group sorting dialog box
- The chart dialog box
- The record selection dialog box
- The template dialog box