

Crystal Reports XI Designer Introduction

Duration: 2 Days

Course Overview:

This two-day workshop is designed to enhance your basic report writing skills and move you into creating more complex reports. Time will be spent walking you through the tips and tricks of advanced report writing along with a good amount of hands-on practice. In addition, you will be introduced to professional design techniques, subreporting and creating advanced formulas.

Students Learn To:

- Design highly formatted, interactive, and professional looking reports
- Group and sort data for summary purposes
- Combine multiple tables
- Build formulas to add non-database data to a report and display data differently
- Format reports and enhance them by adding and modifying graphic elements
- Create single data series charts
- Set the layout for design and previews

Who Should Attend: This course is designed for users with little or no experience with Crystal Reports but who have the need to generate reports based on information from a database.

Prerequisites: To ensure your success, we recommend that you first take Windows 2000 or XP Introduction and have a basic understanding of database concepts.

Course Outline:

Before You Begin

Defining the Purpose of the Report
Determining the Layout of the Report
Finding the Data
Organizing the Data for the Report
The Workbench

Creating a Simple Report

Starting the Crystal Reports Program
Starting a New Report
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
Move/Align Objects with Guidelines
Creating Text Objects
Saving the Report
Previewing the Report
Refreshing the Data
Getting Help

Formatting Features

Formatting with the Template Expert
Formatting Objects
Using the Format Painter
Inserting Lines and Boxes
Inserting Graphics
Working with the Page Commands
Working with Text Objects
Formatting Part or All of an Object
Inserting Special Fields

Selecting Specific Records

Filtering Data with the Select Expert
Selecting Records with Multiple Criteria

Selecting Specific Records (cont.)

Viewing/Editing the Select Formula
Case Sensitive vs. Case Insensitive
Record Selection Formula Templates

Grouping and Sorting Data

When and Why to Group Records
Creating a Group
Modifying Groups
Creating Multiple Groups in a Report
Using the Group Tree to Navigate the Report
Reordering Groups
Sorting Records within a Group
Summarizing Groups
Grouping Data in Date/Time Intervals
Calculating Percentages
Ordering Groups Using the Group Sort Expert

Combining Multiple Tables

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

Creating and Using Formulas

Understanding Crystal Formula Syntax without Being a Programmer
Using the Formula Workshop
Using the Formula Editor
Performing Simple Number Calculations
Manipulating Dates with Formulas
Creating Boolean (True/False) Formulas
Creating String Formulas
Using Bookmarks to Navigate Through Formulas

Conditional Formatting

The Highlighting Expert
Setting Highlighting Priorities
Formatting Sections
Formatting Sections Conditionally
Conditionally Formatting Fields

Summary Reports and Charts

Creating a Summary Report
Applying the Drill-Down Feature
Applying the DrillDownGroupLevel
Producing Charts
Editing Charts
Formatting Charts

Exporting Report Results Within Your Organization

Understanding Export Formats and Destinations
Using an HTML Format for Crystal Reports
HTML Preview
Exporting to Windows Applications
Exporting to a Report Definition Format

Setting Default and Report Options

Setting the Default Layout for Design and Preview Views

Using the Report Wizards

What are the Report Wizards?
Create a Report Using the Standard Report Creation Wizard