

Crystal Reports Training

Topic Outline

Jump Start Crystal Reports Versions XI Level 1: The Basics

1. Introduction & Basic Concepts

- a. Course Objectives, Overview of Manual & Course
- b. New Features in Crystal XI
- c. Visible Changes in Crystal XI
- d. Key Concepts
- e. Crystal & Database Terminology

Getting Started

1. Create a Report Using the Crystal Standard Report Wizard

- a. The Preview Window
- b. Saving Your Report

2. The Design Window

- a. Move Fields, Format Currency, Add Special Fields, and Text Object, Design Window
- b. Crystal Sections, Moving & Modifying Fields
- c. Working with Text Objects
- d. Formatting Numbers
- e. Special Fields
- f. Resizing Sections
- g. Using Guidelines
- h. Adding a Report Title
- i. Changing a Group
- j. Inserting a Field into a Text Object

3. More Formatting & Graphics

- a. Insert Non-Numeric Summaries
- b. Add Cover Page, Text, and Logo
- c. Inserting a Logo or Graphic
- d. Formatting Dates. Formatting Text, Adding and Formatting a Box
- e. Using the Section Expert

Printing & Exporting

1. Printing a Report

- a. Scenario for Workshop 4B,

2. Exporting a Report
 - a. Scenario for Workshop 4C
3. Create Report from Excel Spreadsheet

Designing a New Report

1. Starting a Blank Report
 - a. Manually Inserting Fields
 - b. Manually Insert Group
 - c. Selecting Records
 - d. Creating Summaries
 - e. White Spaces Between Rows
 - f. Adding Summary Info to the Report
2. Summary & Drill-Down Reports
 - a. Create a New Report from an Existing Report
 - b. Modifying an Existing Report
 - c. Adding a Database Table, Database Concepts
 - d. Inserting Another Group
 - e. Change Selection Criteria
 - f. Delete and Add Fields
 - g. Navigating from the Group Tree
3. Sorting vs. Grouping
 - a. Scenario for Workshop 6B
4. Creating a Summary Report
5. How Summaries & Drill-Downs Work
 - a. Drilling Down on Data
 - b. Show Headers on Drill-Down Tabs

Formulas & Functions

1. Create a Formula Field Using Simple Math
2. Create a New Report
3. Create a Formula Field
 - a. Using a Formula Field in a Report
 - b. Create a Formula Using a Function
 - c. Using the Truncate Function
 - d. Adding Highlights
 - e. Using One Field to Change Another
 - f. Using Alerts

4. If-Then-Else Conditions

- a. Creating Conditional Fields**
- b. Selection Criteria, Rules for If-Then-Else-Statements**
- c. Changing Groups**
- d. Nested If-Statements**
- e. Add Formula to Report**
- f. Suppressing a Field**
- g. Adding Objects to Crystal Repository**
- h. Conditional Formatting of Fields**
- i. Conditionally Formatting Sections**

Charting

- 1. Adding a Chart**
- 2. Drilling-Down from a Chart**
 - a. Drill-Down by Group Tree**
- 3. Adding Charts to Groups**