

Crystal Reports 8.5 Quick Start Workshop

Summary: This two-day workshop is designed for beginning users with little or no exposure to Crystal Reports. The intent of the course is to familiarize the students with the Crystal Reports environment and get them up and reporting quickly. The workshop provides the basic steps for creating, modifying, saving and viewing reports to more flexible tasks such as basic formulas and the powerful automated features.

Pre-requisite: Working knowledge of Windows 9x-2000 environment is required. Familiarity with relational database concepts (tables, fields and records) is strongly recommended.

Basic Reporting

Section 1: Basic Reporting

Lesson 1 - Before You Begin

- Lesson Objectives
- Defining the Purpose of the Report
- Determining the Layout of the Report
- Finding the Data
- Organizing the Data for the Report

Lesson 2 - Creating A Simple Report

- Lesson Objectives
- Starting the Crystal Reports Program
- Starting a New Report
 - Choosing a Data Source
- The Main Components of the Design Window
 - Exploring the Toolbars
 - Using the Field Explorer
- 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
 - Autosaving the Report
- Previewing the Report
 - Refreshing the Data
- Getting Help
- Challenge Exercise - Creating a Basic Report

Lesson 3 - Formatting Features

- Lesson Objectives
- Quick Formatting with the Report
- Style Expert
- Formatting Objects
- Inserting Lines and Boxes
 - Drawing a Line
 - Drawing a Box
- Inserting Graphics
- Auto-Arranging the Report
- Working with the Page Commands
 - Changing Page Orientation
 - Changing Margins
- Working with Text Objects
 - Adding Fields into a Text Object
 - Placing Multi-Line Text Objects
- Formatting Part or All of an Object
- Inserting Special Fields
- Challenge Exercise - Formatting Features

Lesson 4 - Selecting Specific Records From the Database

- Lesson Objectives
- 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
- Challenge Exercise - Selecting Specific Records
- Challenge Exercise - Selecting a Range of Values

Lesson 5 - Grouping and Sorting Data For Summary Purposes

- Lesson Objectives
- 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
- Sorting Records Within a Group
- Summarizing Groups
 - Additional Summary Options
 - Adding a Grand Total to Reports
- Grouping Data in Date/Time Intervals
- Calculating Percentages
- Ordering Groups Based on Their Subtotals Using the Top N Expert
- Challenge Exercise - Grouping, Sorting, Summarizing
- Challenge Exercise - Calculating Percentages



Adding Flexibility to Reports

Section 2: Adding Flexibility to Reports

Lesson 6 - Combining Tables Using The Visual Linking Expert

- Lesson Objectives
- Understanding Tables, Records, and Fields
- Learning About Linking
- Adding Multiple Tables to a Report
- Challenge Exercise - Using the Visual Linking Expert to Link Tables

Lesson 7 - Creating and Using Formulas

- Lesson Objectives
- Understanding Crystal Formula Syntax Without Being a Programmer
- 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
- Challenge Exercise - Creating String Formulas
- Challenge Exercise - Doing Calculations
- Challenge Exercise - Subtracting Dates
- Challenge Exercise - Using Nested If Statements

Lesson 8 - Conditional Formatting

- Lesson Objectives
- The Highlighting Expert
- Setting Highlighting Priorities
- Formatting Sections
- Formatting Sections Conditionally
- Conditionally Formatting Fields
- Challenge Exercise - Section Formatting and Conditional Formatting

Lesson 9 - Creating Summary Reports and Graphs

- Lesson Objectives
- Creating a Summary Report
- Applying the Drill Down Feature
- Producing Graphs
- Editing Charts
- Formatting Charts
 - Applying Chart Templates
 - Editing the Titles
 - Using the General Chart Options
- Analyzing Charts
- Challenge Exercise - Creating a Summary Report
- Challenge Exercise - Charting

Lesson 10 - Exporting Report Results Within Your Organization

- Lesson Objectives
- Understanding Export Formats and Destinations
- Using an HTML Format for Crystal Reports
- Exporting to an Application
- Exporting to a Report Definition Format

Lesson 11 - Setting Default and Report Options

- Lesson Objectives
- Setting the Default Layout for Design and Preview Views
- Setting the Database File Location
- Setting the Database and Reporting Options
- Setting Field Defaults
- Setting the Default Font

Lesson 12 - Using the Report Experts

- Lesson Objectives
- What are the Report Experts?
- Create a Report Using the Standard Report Expert
- Modifying a Report Using the Report Expert
- Challenge Exercise - Create a Report Using a Report Expert

Appendix A - Mapping

- Lesson Objectives
- Understanding Maps
 - Map Layouts
 - Map Types
- Formatting the Map
- Drilling Down on Maps
- Using the Analyzer Tab for Advanced Mapping
 - Changing the Geographic Map
 - Using the Map Navigator
 - Changing Map Layers
 - Resolving Data Mismatches

Appendix B - Creating an ODBC Data Source to Attach to a Database

- Creating an ODBC Connection to Any Database

Appendix C - Pre-Qualification Exercise for the Power User Workshop

- Why Should You Pre-qualify Yourself for the Power User Workshop?
- Pre-qualification Exercise

