

# Crystal Reports 9.0 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

### Lesson 1: Before You Begin

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

### 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
- 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
- Autosaving the Report
- Previewing the Report
- Refreshing the Data
- Getting Help
- Challenge Exercise - Creating a Basic Report

### Formatting Features

- Lesson Objectives
- 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

### 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

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



# Adding Flexibility to Reports

## Section 2: Adding Flexibility to Reports

### Combining Multiple Tables

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

### Creating and Using Formulas

Lesson Objectives  
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  
Challenge Exercise - Creating String Formulas  
Challenge Exercise - Doing Calculations  
Challenge Exercise - Subtracting Dates  
Challenge Exercise - Using Nested If Statements

### 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

### Creating Summary Reports and Charts

Lesson Objectives  
Creating a Summary Report  
Applying the Drill Down Feature  
Applying the DrillDownGroupLevel  
Producing Charts  
Editing Charts  
Formatting Charts  
Using the General Chart Options  
Modifying Individual Objects in the Chart  
Using Auto-Arrange Chart  
Applying Chart Templates  
Applying Chart Templates  
Challenge Exercise - Creating a Summary Report  
Challenge Exercise - Charting

### Exporting Report Results Within Your Organization

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

### Setting Default and Report Options

Lesson Objectives  
Setting the Default Layout for Design and Preview Views

### Using the Report Wizards

Lesson Objectives  
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  
Challenge Exercise - Create a Report Using a Report Wizard

### 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

### Creating an ODBC Data Source to Attach to a Database

Creating an ODBC Connection to Any Database

### Pre-Qualification Exercise for the Power User Workshop

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

### The Xtreme Sample Database 9

### Function and Operator Locations

