

Crystal Reports 9.0 Power User Workshop

Summary: This 2-day workshop is designed for experienced Crystal Report users. The intent of the course is to increase the design skills and expand into the expert features and powerful functionality of Crystal Reports. This workshop delves into the most complex techniques used for creating reports and solving reporting problems, as well as hands-on practice time with formula solutions.

Pre-requisites: Working knowledge of Windows 9X-2000 environment and a thorough understanding of relational database (tables, fields and records) and reporting concepts are required. Successful Completion of either the Quick Start for Novice Users Workshop or the Pre-qualification exercise is strongly recommended.

Power Formatting and Formulas

Lesson 1 - Refresher Exercise

- Lesson Objectives
- Review of Planning a Report
- Creating the Report
- Placing Fields on the Report
- Creating the Formulas
- Advanced Grouping
- Selecting Certain Records
- Helpful Hints for Formatting the Report
- Adding and Working with Text Objects
- Hiding and Suppressing Sections
- Guidelines

Lesson 2 - Power Formatting with Multiple Sections

- Lesson Objectives
- Using Multiple Sections in Reports
- Using the Section Expert to Work with Sections
- Conditionally Formatting Multiple Sections
- Advanced Drill Down Group Level
- Challenge Exercise - Formatting with Multiple Sections
- Challenge Exercise - Conditionally Formatting Multiple Sections

Lesson 3- Prompting with Parameters

- Lesson Objectives
- Parameter Fields Overview

Lesson 3: Continued

- Parameter Field Considerations
- Creating a Parameter Field
- Using a Parameter to Select Records
- Using a Parameter Field
- Creating a Pick List for Parameter Values
- Importing a Pick List
- Adding Parameter Values to Text Objects
- Allowing Multiple Values in Parameters
- Using Multiple Parameter Fields in Reports
- Specifying and Limiting a Range for a Parameter
- Limiting the Range for a Parameter
- Using Parameters in Conditional Formatting
- Using an Edit Mask to Limit String Parameters
- Sorting with a Parameter
- Challenge Exercise - Using Parameters

Lesson 4- Subreports

- Lesson Objectives
- Understanding Subreports
- Unlinked versus Linked Subreports
- Creating an Unlinked Subreport
- Linking a Subreport
- Database Links versus Subreports in One-to-Many Situations
- Creating On-Demand Subreports
- Creating Hyperlinks
- Using Subreports to Link "Unlinkable" Data
- Challenge Exercise - Creating Reports with Linked Subreports

Lesson 5- Creating Powerful Groups

- Lesson Objectives
- Using the Group Expert
- Using a Field Name to Customize the Group Name
- Using a Formula to Customize the Group Name Field
- Lesson 5: Continued**
- Creating Custom Groups
- Grouping on a Formula Field
- Using Group Selection to Filter the Records in the Report
- Grouping Hierarchically
- Additional Practice Exercise - Create Customized Grouping
- Brain Teaser - Using Group Selection
- Challenge Exercise - Creating a Group Using a Formula

Lesson 6 - Using Advanced Formula Features

- Lesson Objectives
- Understanding How Crystal Reports Processes the Data
- What Is a Pass?
- Using Evaluation Time Functions
- Working with Variables
- Declaring a Variable
- Assigning a Value to a Variable
- Using a Variable in a Formula
- Variable Scope
- Separating Statements in Complex Formulas
- Working with Arrays
- Challenge Exercise - Understand and Set Up the YTD Comparison Report
- Challenge Exercise - Declare Variables and Conditionally Assign Values to Them



Using Power Tools to Create Advanced Reports

Lesson 7- Running Totals

Lesson Objectives
Understanding Running Totals
Creating Running Totals for a List of Numbers
Conditional Running Totals
Challenge Exercise - Creating Running Totals
Challenge Exercise - Creating a Conditional Running Total

Lesson 8 - Working with Cross-Tab Reports

Lesson Objectives
Understanding How Cross-Tabs Affect Your Data
Creating a Cross-Tab Report
Creating a Cross-Tab with Multiple Rows or Column
Applying a Formatting Style to the Cross-Tab
Customizing the Cross-Tab Format
Changing Background Colors
Formatting Individual Cells
Changing the Summary Operation
Suppressing Rows, Columns or Totals
Repeating Row Heading for Multi-Page Cross-Tabs
Using Alias Names for Column and Row Headings
Charting Cross-Tabs
Challenge Exercise - Cross-Tab Reports

Lesson 9 - The Repository

Lesson Objectives
Understanding the Repository
Getting to know the Crystal Repository
Creating your own Repository
Repository and Text
Objects/Images
Repository and SQL Commands
Lesson 9: Continued
Repository and Custom Functions
Challenge Exercise - Creating a Report using the Crystal Repository

Lesson 10 - Report Templates

Lesson Objectives
Understanding Report Templates
Applying Report Templates
Creating your own Report Template
Rules for Report Templates
Challenge Exercise - Creating a Report Template and Applying it.

Lesson 11 - Introduction to Custom Functions

Lesson Objectives
Understanding Custom Functions
Using a Custom Function
Basic modification of a Custom Function
Sharing a Custom Function

Lesson 12 - Advanced Formula Syntax

Lesson Objectives
Select Case Statement
For Loop
While Do loop
Join and Split
Challenge Exercise - Using the above syntax in a report

Lesson 13 - SQL Commands

Lesson Objectives
Understanding SQL and ODBC
Why Use a Command?
Writing a Report Against the Command

Lesson 14 Advanced Linking

Lesson Objectives
Using the Database Expert
Adding and Removing Databases from the Report
Remapping Database Fields
Using the Map Fields Dialog Box to Remap Fields
Adding Tables to a Report Multiple Times
Changing the Join Type for a Link

Appendix A - Creating Report Alerts

Lesson Objectives
What are Report Alerts
Creating Report Alerts
Challenge Exercise - Using Report Alerts with Parameter

Appendix B - Running Reports Efficiently

Understanding What Crystal Can Pass to the Database and How That Affects Report Performance
Strategies for Efficient Report Performance
Interpreting the SQL Query
Using an SQL Statement to Make a Report More Efficient
Using the Switch Function to Pass a Conditional Statement to the Database
Appendix B: Continued
Challenge Exercise - Using a Switch Function to Push Conditional Selection to the Database

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

Creating an ODBC Connection to Any Database

Appendix D- Using the Excel and Access Add-Ins

Lesson Objectives
Understanding the Crystal Reports Add-Ins
Installing the Microsoft Excel Add-In
Installing the Microsoft Access Add-In
Creating a Report in Excel
Creating a Report in Access

Appendix E - The Xtreme Sample Database 9

Appendix F- Function and Operator Locations

Appendix G - Glossary



