
Crystal Reports – Advanced

National Competency Standard (ICA05):

ICAB4136B Use structured query language to create database structures and manipulate data



Objectives

This two day interactive workshop was designed for new users of Crystal Reports XI. Some of the topics covered include a review of the software features, report design and the creation of presentation quality reports. The course incorporates a number of hands on exercises to reinforce the learning process.

Pre-Requisites

Those attending this course should be familiar with personal computers and be competent in the use of the keyboard and mouse.

Duration

2 Days.

Course Outcomes

1. Create formulas with multiple statements and use variables.
2. Understand and control the calculation process used to compile your data.
3. Control the appearance of your report using conditional format statements and multiple sections.
4. Create parameter formulas that allow your users to determine what information they want to see on a report.
5. Enhance the analysis capability of your cross-tabs.
6. Extend your reporting capacity by utilizing sub-reports.
7. Access data from SQL/ODBC data sources, and generate queries using Crystal SQL Designer.
8. Create and modify dictionary files to simplify the reporting process for your users.
9. Create and edit graphical representations of your data using the Chart Expert or modify existing graphs with the Chart Analyzer.

Optional Assessment

This is a nationally recognised training program. Participants who successfully complete the optional assessment component of this course will receive a Statement of Attainment for the unit of competency outlined above (additional fee applies). Participants who choose not to be assessed will receive a Certificate of Attendance. The case study assignment is completed in the participant's own time.

Course Content

Power Formatting and Formulas

- 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

Power Formatting with Multiple Sections

- Using Multiple Sections in Reports
- Using the Section Expert to Work with Sections
- Conditionally Formatting Multiple Sections

Using the Running Totals Feature

- Understanding Running Totals
- Creating Running Totals for a List of Numbers
- Conditional Running Totals

Prompting with Parameters

- Parameter Fields Overview
- Parameter Field Considerations
- Creating a Parameter Field
- Using a Parameter to Select Records
- Using a Parameter Field
- Creating a Dynamic Value 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
- Using Parameters in Conditional Formatting
- Using an Edit Mask to Limit String Parameters
- Sorting with a Parameter
- Group Sorting with a Parameter
- Using a Parameter to set N in a Top N or Bottom N report
- Displaying Parameter Fields
- Cascading Parameter Fields

Using Advanced Formula Features

- Understanding How Crystal Reports Processes the Data
- What Is a Pass
- Pre-Pass #1
- Pass #1
- Pre-Pass #2
- Pass #2
- Pass #3
- 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
- Understanding the Formula Evaluation Time Debugger

Using Subreporting as a Workaround Solution

- Understanding Subreports
- Unlinked versus Linked Subreports
- Creating an Unlinked Subreport
- Linking a Subreport
- Database Links versus Subreports in One-to-Many Situations
- Formatting the Subreport
- Passing Data from the Main Report into a Subreport
- Creating On-Demand Subreports

- Creating Hyperlinks
- Using Subreports to Link "Unlinkable" Data

Creating Powerful Groups

- Customizing the Group Name Field
- Using a Field Name to Customize the Group Name
- Using a Formula to Customize the Group Name Field
- Creating Custom Groups
- Customizing Group Sort Order
- Grouping on a Formula Field
- Using Group Selection to Filter the Records in the Report
- Grouping Hierarchically

Working with Cross-Tab Reports

- Understanding How Cross-Tabs Affect Your Data
- Creating a Cross-Tab Report
- Creating a Cross-Tab with Multiple Rows or Columns
- Applying a Formatting Style to the Cross-Tab
- Customizing the Cross-Tab Format
- Changing Background Colours
- 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
- Customizing Cross-Tab Group Names
- CurrentFieldValue

Report Alerts

- What are Report Alerts
- Creating Report Alerts
- Basing Report Formulas or Conditional Formatting on Report Alerts
- Creative Usage for Report Alerts

Report Templates

- What is a Report Template
- Standard Report Creation Wizard and Templates
- The Template Expert
- Applying a Template and the consequences
- Template Considerations
- Creating Your Own Templates
- Inserting Template Fields
- Formatting Template Fields
- Giving Template Fields a Value

Appendices

- The Xtreme Sample Database
- Installation and System Requirements
- Installing the Application
- Minimum Installation Requirements
- Function and Operator Locations