
Crystal Reports – Introductory

National Competency Standard (ICA05):

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



Objectives

Upon completion of this course attendees will be able to perform report creation including sorting, grouping, linking, produce basic formulas, work with report experts and distribute reports to other users.

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. Plan the needs for your report including data and appearance.
2. Become familiar with components of the Crystal Reports application window.
3. Create reports based directly on database information, use a report expert or create a copy of an existing report.
4. Add, modify and remove report objects such as data fields, text objects, file information, graphics or decorative lines and boxes.
5. Format the appearance of your report using font, colour, border and number choices.
6. Change the selection criteria and sort order of your data.
7. Create subtotals, grand totals and summaries for your report data.
8. Create, edit and delete formulas. Understand Crystal's formula language.
9. Understand linking concepts then create and modify your own links.
10. Identify and control Crystal's report sections.
11. Distribute your reports to those who need the information through a variety of methods.

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

Basic Reporting

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

Formatting Features

- Quick Formatting with the Template Expert
- Formatting Objects
- Format Painter
- Inserting Lines and Boxes
- Drawing a Line

- Drawing a Box
- Inserting Graphics
- Working with the Page Commands
- 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

- 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

Grouping and Sorting Data

- 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
- Summarising Groups
- Additional Summary Options
- Grouping Data in Date/Time Intervals
- Calculating Percentages
- Ordering Groups Based on Their Subtotals Using the Group Sort Expert

Combining Multiple Tables

- Understanding Tables, Records, and Fields
- Learning About Linking
- Adding Multiple Tables to a Report

Creating and Using Formulas

- 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

Conditional Formatting

- The Highlighting Expert
- Setting Highlighting Priorities
- Formatting Sections
- Formatting Sections Conditionally
- Conditionally Formatting Fields

Creating Summary Reports and Charts

- Creating a Summary Report
- Applying the Drill Down Feature
- Applying the DrillDownGroupLevel
- Producing Charts

- Editing Charts
- Formatting Charts
- Using the Chart Options
- Modifying Individual Objects in the Chart
- Using Auto-Arrange Chart
- Applying Chart Templates

Exporting Your Reports Within Your Organization

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

Setting Default and Report Options

- Setting the Default Layout for Design and Preview Views

Using the Report Wizards

- 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

Appendices

- Mapping
 - Understanding Maps
 - Map Layouts
 - Map Types
 - Formatting the Map
 - Exercise A.1 - Format the Map
 - Drilling Down on Maps
 - Advanced Formatting of Maps
 - Changing the Geographic Map
 - Using the Map Navigator
 - Changing Map Layers
 - Resolving Data Mismatches

- Creating an ODBC Connection to Any Database
- Pre-Qualification Text for Designer 2 Workshop
 - Pre-Qualification Exercise for the Designer 2 Workshop
 - Why Should You Pre-qualify Yourself for the Designer 2 Workshop?
 - Pre-qualification Exercise
- The Xtreme Sample Database
- Installation and System Requirements
- Installing the Application
- Minimum Installation Requirements
- Function and Operator Locations