Crystal Reports 2013 Designer 1 Workshop

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.

Course Objectives:

- Multiple Table Joins
- Creating Formulas
- Conditional Formatting
- Creating Summary Reports
- Exporting Reports
- Use Report Wizards
- Default Reporting Options
- Report Layout and Design

Audience: Administrators, developers and end-users who need to create dynamic reports from varying data sources.

Prerequisites: Working knowledge of Windows 2000/XP/Vista environment is required. Familiarity with relational database concepts (tables, fields, and records) is strongly recommended.

Number of Days: 2 days

1 Creating a Simple Report

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
Using the Status Bar
Getting Help

2 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

3 Selecting Specific Records from the Database

Filter Types of the Select Expert
Database Filtering with the Select Expert
Selecting Records with Multiple Criteria

Viewing and Editing the Select Formula
Case Sensitive vs. Case Insensitive
Record Selection Formula Templates
4 **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 Preview Panel
Using the Group Tree to Navigate the Report
Reordering Groups
Sorting Records within a Group
Using the Sort Control
Summarizing Groups
Additional Summary Options
Grouping Data in Date/Time Intervals
Calculating Percentages
Ordering Groups Based on Their Subtotals Using the Group Sort Expert
5 **Combining Multiple Tables**
Understanding Tables, Records, and Fields
Learning about Linking
Adding Multiple Tables to a Report
6 **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
7 **Conditional Formatting**
Formatting Sections
Formatting Sections Conditionally
Conditionally Formatting Fields
8 **Creating Summary Reports and Charts**
Creating a Summary Report
Applying the Drill down Feature
Applying the DrillDownGroupLevel
Producing Charts
Editing and Formatting Charts
Using the Chart Options
Modifying Individual Objects in the Chart
Using the Chart Options
Applying Chart Templates
9 **Exporting Your Reports within Your Organization**
Understanding Export Formats and Destinations
Using the PDF Format for Crystal Reports
HTML Preview
Exporting to Windows Applications
Exporting to a Report Definition Format
10 **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
11 **Appendix A - Mapping**
Understanding Maps
Map Layouts
Map Types
Formatting the Map
Drilling Down on Maps
Advanced Formatting of Maps
Changing the Geographic Map
Using the Map Navigator
Changing Map Layers
Resolving Data Mismatches
12 **Appendix B – Before You Begin**
Defining the Purpose of the Report

Determining the Layout of the Report
Finding the Data
Organizing the Data for the Report
The Workbench
13 **Appendix C – Setting Default and Report Options**
Setting the Default Layout for Design and Preview Views
Why Should you Pre-qualify Yourself for the Designer 2 Workshop?
Pre-qualification Exercise
14 **Appendix D – Pre-Qualification Text for Designer 2 Workshop**
Why Should You Pre-qualify Yourself for the Designer 2 Workshop?
Pre-qualification Exercise
15 **Appendix E – The Northwind 2008 Database**
16 **Appendix F – Installation and System Requirements**
Installing the Application
Minimum Installation Requirements
17 **Appendix G – Function and Operator Locations**
18 **Appendix H – Setup Instructions for Crystal Reports 2013**
CR 2013 Application Installation Instructions
Installed Required Class Files
19 **Appendix I: Glossary**