

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:**

- Plan and organize a report.
- Create a new report.
- Save and preview a report.
- Navigate through the report.
- Format and edit report objects.
- Use a report style for formatting.
- Add text objects to reports.
- Add lines, boxes, and graphics images to reports.
- Select specific data from a database.
- Group, sort and summarize reports.
- Create reports that pull data from multiple tables.
- Use the formula editor to perform number calculations.
- Create formulas that manipulate dates.
- Modify string fields using powerful text functions.
- Conditionally format numbers with the Highlighting Expert.
- Format sections on the report.
- Use formulas to conditionally format any type of field.
- Create summary reports for efficient analysis of data.
- Add charts and customize how they look.
- Distribute reports throughout your organization with Crystal’s export feature.
- Create geographical maps for charting.
- Set up an ODBC connection to your database.

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

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

**Number of Days:** 2 days

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| <p><b>1. Before You Begin</b><br/>         Defining the Purpose of the Report<br/>         Determining the Layout of the Report<br/>         Finding the Data<br/>         Organizing the Data for the Report<br/>         The Workbench</p> | <p><b>2. Creating a Simple Report</b><br/>         Starting the Crystal Reports Program<br/>         Starting a New Report<br/>         The Main Components of the Design Window</p> |
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- 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
- 3. 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
- 4. 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
- 5. 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
- Summarizing Groups
- Additional Summary Options
- Grouping Data in Date/Time Intervals
- Calculating Percentages
- Ordering Groups Based on Their Subtotals Using the Group Sort Expert
- 6. Combining Multiple Tables**
  - Understanding Tables, Records, and Fields
  - Learning about Linking
  - Adding Multiple Tables to a Report
- 7. 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
- 8. Conditional Formatting**
  - The Highlighting Expert
  - Setting Highlighting Priorities
  - Formatting Sections
  - Formatting Sections Conditionally
  - Conditionally Formatting Fields
- 9. 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
- 10. 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
- 11. Setting Default and Report Options**
  - Setting the Default Layout for Design and Preview Views
- 12. 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
- 13. 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
- 14. Appendix B – Creating an ODBC Connection to Any Database**
- 15. Appendix C – Pre-Qualification Text for Designer 2 Workshop**
- Why Should You Pre-qualify Yourself for the Designer 2 Workshop?
- Pre-qualification Exercise
- 16. Appendix D – The Xtreme Sample Database 11**
- 17. Appendix E – Installation and System Requirements**
  - Installing the Application
  - Minimum Installation Requirements
- 18. Appendix F – Function and Operator Locations**