

Crystal Reports

Level 1

Course Overview

In this 2-day course, you will learn the essentials of creating reports in Crystal Reports 2013 (also applicable to versions 2008 and XI). Following an overview of the Crystal Reports environment, you will learn how to create a new report. This will include placing fields on the report, sizing, moving, and aligning objects, creating extra text objects, previewing a report, and refreshing data. You will also learn how to select specific records from the tables using filtering techniques on text and numbers. Additionally, you will learn how to group and sort data, including how to create multiple groups, counting or summing data within each group. You will learn how to group by date intervals, calculate percentages, and sort groups based on their summary data. You will also learn how to format reports with both static and dynamic formatting. This will include formatting text objects, drawing lines and boxes, inserting graphics, changing margins, turning pages sideways (landscape), and adding page breaks. Additionally, you will learn how to link multiple tables together to create a single unit of data for a report. You will also create custom formulas to calculate numbers and dates, and manipulate text strings. Finally, you will learn how to export data to HTML and Excel, set default options, and use the Report Wizard to create a report.

Crystal Reports Course Series:



Course Topics

Creating a Report

- Starting a New Report
- Exploring the Toolbars
- Saving the Report
- Placing Fields in the Details Section
- Resizing Fields and Their Labels
- Resizing a Text Object to Match Another One
- Browsing Field Data
- Moving an Object
- Using Vertical Guidelines
- Using Horizontal Guidelines
- Inserting an Additional Text Object
- Previewing the Report and Refreshing Data
- Using the Help System

Selecting Records

- Searching for an Exact Text Match
- Saving the Report and Refreshing Data
- Using AND Criteria Conditions and Searching for Numbers
- Using OR Criteria Conditions
- Deleting Criteria

Grouping and Sorting

- Creating a Group
- Editing a Group

- Adding a Group Within a Group
- Sorting Records Within a Group
- Inserting Summary Calculations per Group
- Labeling the Summary Calculations
- Creating a Group on a Date Field
- Formatting the Group Name Field
- Calculating a Percentage per Group
- Sorting Groups Based on Group Totals

Applying Formatting

- Using the Template Expert
- Formatting a Text Object
- Formatting Multiple Text Objects
- Using the Format Painter
- Inserting and Formatting a Line
- Inserting and Formatting a Box
- Inserting a Graphic
- Modifying the Report Margins
- Inserting Data Fields into a Text Object
- Formatting All and Part of a Text Object
- Inserting a Special Field
- Inserting a Special Field in a Text Object

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Linking Multiple Tables

- Starting a Report with One Table
- About the Primary Key
- About One-to-Many Relationships
- Adding and Linking a "Many" Table
- Adding Another "Many" Table
- Adding a "One" Table
- About Many-to-Many Relationships
- Examining an Inner Join
- Using an Outer Join

Creating Formulas

- Creating a Formula Field
- Using Formulas in Other Formulas
- Using a Function in a Formula
- Creating a Formula to Concatenate Text
- Calculating a Date
- Creating a Boolean (True/False) Formula
- Creating a Formula to Manipulate Text
- Creating a Conditional Formula
- Using a Condition Within a Condition

Applying Conditional Formatting

- Using the Highlighting Expert
- Setting Multiple Rules
- Setting Page Breaks Between Each Group
- Conditionally Setting the Page Breaks
- Creating Advanced Conditional Formatting

Various Short Topics

- Exporting a Report to a PDF File
- Exporting a Report to an Excel File
- Setting the Layout Options
- Setting Font and Field Defaults
- Creating a Report Using the Report Wizard