



Crystal Reports XI Introduction

2348 Post Road
Warwick, RI 2886
Phone: 41-921-245 Fax: 41-921-2463
www.homekeyinc.com

Course Description

Crystal Reports XI: Introduction is the primary recommended course you should take if your job responsibilities require you to obtain output from databases. It is also the first course in the Crystal Reports XI series. In this course, you will build basic list and group reports that work with almost any database.

Target Student

This course is designed for a person who needs output from a database. In some cases, database programs have limited reporting tools, and/or they may not have access to those tools.

Prerequisites

Before taking this course, students should be familiar with the basic functions of Windows, such as creating and navigating folders, opening programs, manipulating windows, copying and pasting objects, formatting text, and saving files. In addition, students should have taken Microsoft Office Access 23 Intro or have equivalent experience with basic database concepts.

Performance-Based Objectives

Upon successful completion of this course, students will be able to:

- create a report by using data from an existing database.
- use a report to present specific data in the desired order.
- create groups to summarize report data.
- build formulas to calculate and display data.
- format reports.
- add and modify elements in a report.
- create single data series charts.
- distribute report data.

Crystal Reports XI Designer 1

Summary: 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.

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

Basic Reporting

Before You Begin

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

Creating a 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
- Auto-saving the Report
- Previewing the Report
- Refreshing the Data
- Getting Help
- Challenge Exercise - Creating a Basic Report

Formatting Features

- Quick Formatting with the Template Expert
- Using the Format Painter
- Formatting Objects
- Inserting Lines and Boxes
- Drawing a Line
- Drawing a Box
- Inserting Graphics
- Working with the Page Commands
- Changing Page Orientation
- Changing Margins
- Working with Text Objects
- Adding Fields into a Text Object
- Formatting Part or All of an Object
- Inserting Special Fields

Database Filters

- 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
- Challenge Exercise - Selecting Specific Records
- Challenge Exercise - Selecting a Range of Values

Report Grouping

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

Adding Flexibility to Reports

Multiple Table Joins

- Understanding Tables, Records, and Fields
- Learning About Linking
- Adding Multiple Tables to a Report
- Challenge Exercise - Using the Database Expert to Link Tables

Creating 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
- Challenge Exercise - Creating String Formulas Challenge
- Exercise - Doing Calculations
- Challenge Exercise - Subtracting Dates
- Challenge Exercise - Using Nested If Statements

Conditional Formatting

- The Highlighting Expert
- Setting Highlighting Priorities
- Formatting Sections
- Formatting Sections Conditionally
- Formatting Fields
- Challenge Exercise - Section Formatting and Conditional Formatting

Summary Reports and Charts

- Creating a Summary Report
- Applying the Drill Down Feature
- Applying the DrillDownGroupLevel
- Producing Charts
- Editing Charts
- Formatting Charts
- Using the General Chart Options
- Modifying Individual Objects in the Chart
- Using Auto-Arrange Chart
- Applying Chart Templates
- Challenge Exercise - Creating a Summary Report
- Challenge Exercise - Charting

Exporting Reports

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

Default Options

- Setting the Default Layout for Design and Preview Views

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
- Challenge Exercise - Create a Report Using a Report Wizard

For After the Class

APPENDIX A - Mapping

- Understanding Maps
- Map Layouts
- Map Types
- Formatting the Map
- Drilling Down on Maps
- Using the Analyzer Tab for Advanced Mapping
- Changing the Geographic Map
- Using the Map Navigator
- Changing Map Layers
- Resolving Data Mismatches

APPENDIX B – Creating an ODBC Data Source to Attach to a Database

- Creating an ODBC Data Source to Attach to a Database
- Creating an ODBC Connection to Any Database

APPENDIX C - Pre-Qualification Exercise for the Power User Workshop

- Why Should You Pre-qualify Yourself for the Power User Workshop?
Pre-qualification Exercise

APPENDIX D – The Xtreme Sample Database

- A relational diagram of tables existing the Xtreme Sample Database provided on the Crystal Reports Installation CD

APPENDIX E - Installation and System Requirements

- Review the necessary hardware and operating system requirements to make Crystal Reports operate correctly

APPENDIX F - Function and Operator Locations

- A complete listing of all the available Formula Functions and an explanation of the new Custom Functions

APPENDIX G – Glossary

- A complete glossary of terms used throughout the book