



# Crystal Reports for Beginners

## Course Outline

### Who should attend?

Users who want to learn the basics of report design using Crystal Reports.

### Course Duration:

2 day Instructor-led class consisting of lectures, hands-on exercises and demonstrations.

### Prerequisites:

- Working knowledge of windows conventions
- Basic database concepts

### What will I learn?

After completing the course, you will be able to:

- Plan a report
- Create a report
- Select records
- Organize data on a report
- Format a report
- Apply section formatting
- Create basic formulas
- Apply conditional reporting
- Present data visually
- Distribute a report

## 1. Getting started

- 1.1. Planning a report
- 1.2. Understanding the Crystal Reports Environment – Design Tab, Toolbars, Preview Tab
- 1.3. Connecting to the data source using the Database Expert
- 1.4. Placing objects on the report using the Field Explorer
- 1.5. Report Titles using Summary Info and Text Box
- 1.6. Previewing and saving reports
- 1.7. Modifying reports - Resizing fields, Arranging Fields, Field Alignment

## 2. Organizing Records

- 2.1. Sorting
- 2.2. Record selection
  - Understanding the Select Expert Features
  - Determining the record selection criteria
  - Applying record selection on string, number and date fields
  - Using multiple section criteria
  - Modifying record selection with the formula editor
- 2.3. Grouping
  - Creating groups
  - Modifying groups
  - Nested Groups
  - Specified groups
- 2.4. Summarizing
  - Inserting summaries for different data types
  - Creating percentage summaries
  - Inserting Grand Totals
  - Using the Group Sort Expert

## 3. Formatting

- 3.1. Using the Format Editor
- 3.2. Formatting String Fields
- 3.3. Formatting Number Fields
- 3.4. Formatting Date Fields
- 3.5. Adding Lines and Boxes

## 4. Section Formatting

- 4.1. Using the section expert features to format sections
- 4.2. Creating summary reports

## 5. Formulas and Functions

- 5.1. Formula basics
  - Formula Components and Syntax
  - Using the Formula Workshop
  - Creating basic formulas
- 5.2. Modifying formulas
  - Editing formulas
  - Deleting formulas
- 5.3. Functions
  - Basic Calculations using summary functions
  - String Manipulation
  - Basic Date Functions
  - Boolean Formulas
  - Applying If Then Else formulas
  - Using Nested if then else statements
- 5.4. Conditional formatting
  - Using the Highlight Expert
  - Formatting fields conditionally

## 6. Wizards

- 6.1. How to use the report wizards
- 6.2. Creating a cross tab report using the wizard
- 6.3. Creating a cross tab report in an existing report
- 6.4. Formatting cross tabs

## 7. Report Distribution

- 7.1. Exporting the report in various formats
- 7.2. Distributing the reports