



Course Syllabus

Crystal Reports XI Level 1

Two Days • Instructor-led

This 2-day interactive workshop is 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.

Audience

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

Prerequisites

Before attending this course, students must have:

- A working knowledge of the Windows environment

(Familiarity with relational databases concepts, such as tables, fields, and records are strongly recommended.)

Business Objectives Certified Professional Exams

Whether you are an individual seeking to upgrade your skills or an IT manager seeking to certify your staff or hire qualified talent, our certification programs will enhance your business intelligence (BI) skill proficiency and knowledge. Open to any end user and built on blended learning and proven design methodologies, Business Objects offers certification on Crystal Reports® XI technologies. This class will help you prepare for your Crystal Reports Level 1 exam.

Objectives:

- Creating and modifying reports.
- Saving and viewing reports.
- Basic formulas.
- Automated features.

Course Outline

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

Lesson 1: Creating a Simple Report

- Starting the Crystal Reports program
- Starting a new report
- 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
- Getting help

Lesson 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

Lesson 3: 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

Lesson 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 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

Lesson 5: Combining Multiple Tables

- Understanding tables, records, and fields
- Learning about linking
- Adding multiple tables to a report

Lesson 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

Lesson 7: Conditional Formatting

- The Highlighting Expert
- Setting highlighting priorities
- Formatting sections
- Formatting sections conditionally
- Conditionally formatting fields

Lesson 8: Creating Summary Reports and Charts

- Creating a summary report
- Applying the Drill Down feature
- Applying the Drill Down group level
- Producing, editing and formatting charts
- Editing charts
- Formatting charts
- Using the chart options
- Modifying individual objects in the chart
- Using the auto-arrange chart
- Applying chart templates

Lesson 9: Exporting Report Results within Your Organization

- Understanding export formats and destinations
- Using an HTML format for Crystal Reports
- Exporting to Windows applications
- Exporting to a report definition format

Lesson 10: Setting Default and Report Options

- Setting the default layout for design and preview views

Lesson 11: 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

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

Appendix B: Creating an ODBC Data Source to Any Database

Appendix C: Pre-Qualification Test for Designer 2 Workshop

- Why Should You Pre-qualify yourself for the Designer 2 Workshop?
- Pre-qualification Exercise

Appendix D: The Xtreme Sample Database 10

Appendix E: Installation and System Requirements

- Installing the application
- Minimum installation requirements

Appendix F: Function and Operator Locations