

Course Description: Designed for individuals new to Crystal Reports. In this 2-day course you will become familiar with the Crystal Reports interface. You will learn how to connect to the data the report will represent and then how to create reports using a wizard and from scratch. You will learn to format, sort, and filter those reports. You will learn to enhance the appearance of the report with graphics and drawn objects. You will learn how to sort and filter report data and how to organize report data into groups. You will also learn to create basic formulas and add them to the report. You will learn how to use conditional formatting, create reports based on Excel data, and how to export Crystal Reports to other file formats.

Module 1 – Exploring Crystal Reports

- What is Crystal Reports?
- Navigating the Crystal Reports Interface
- Understanding the Explorers

Module 2 – Creating Basic Reports

- Getting Started
- Connecting to a Data Source
- Adding Fields to the Report
- Using the Browse Feature
- Working with Report Objects
 - Moving & Aligning
 - Adding Text Objects
 - Editing a Text Object's Content
 - Positioning and Sizing
- Understanding Report Sections
- Using Guidelines
- Previewing the Report
- Saving Reports
- Using the Autosave feature
- Refreshing Report Data

Module 3 – Formatting Reports

- The Template Expert
- Using the Formatting Toolbar
- Using the Format Editor
- Changing Fonts and Font Sizes
- Choosing Date Formats
- Setting Margins and Page Orientation
- Choosing Default Formatting Options
- Drawing Lines and Boxes
- Adding Graphics
- Adding Special Fields to the Report
- Wrapping Text in Text Objects

Module 4 – Selecting and Sorting Records

- Selecting Records
 - What is it and Why do it?
 - Using the Select Expert
 - Filtering with Text Fields
 - Filtering with Date Fields
 - Record Selection on Two or More Fields
 - Clearing the Record Selection
 - Filter Data using a Formula
 - Viewing & Modifying the Selection Formula
- Saved vs. Refreshed Data
- Sorting Records
 - On One Field
 - On Additional Fields

Module 5 – Creating Groups

- Creating Groups with the Group Expert
- Setting Group Options
- Sorting
- Modifying Groups
- Naming Groups
- Creating Custom Group Names
- Using the Group Tree
- Drilling Down
- Group Selection Techniques
- Creating Group Summaries
- Adding another Group
- Removing Groups
- Creating a Custom Group
- Suppressing Report Sections
- Using Group Filters
- Formatting Grouped Reports

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Outline: Crystal Reports Level 1

2 Days 9:00 a.m. – 4:00 p.m.

Module 6 – Creating Basic Formulas

- **Creating Formula Fields**
- **Using the Formula Editor**
- **Basic Calculations**
- **Adding a Calculated Field to a Report**
- **Modifying Calculations**

Module 7 – Conditional Formatting

- **What is Conditional Formatting**
- **Using the Highlighting Expert**
- **Formatting for Multiple Conditions**
- **Using the Formula Editor**

Module 8 – Using Excel as a Data Source

- **Connecting to Excel Data**
- **Creating the Report**
- **Modifying the Report**
- **Refreshing Report Data**

Module 9 – Exporting Crystal Reports Data

- **Export to Excel**
- **Export to PDF**