

# Crystal Reports Basic Skills (2 Days)

**Prerequisites:** Windows Fundamentals and working knowledge of database concepts

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## Objectives

- Create a list report by using data from an existing database
  - Locate and present data in a specified order
  - Create groups to summarize report data
  - Build formulas to add non-database data to a report and display data differently
  - Format reports
  - Enhance reports by adding and modifying elements in a report
  - Create single data series charts
  - Distribute report data to other users
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## Course Outline

### Lesson 1: Creating a Report

- Set Default Report Settings
- Plan a Report
- Crystal Environment
- Default Settings
- Build the Report
- Data Sources
- Table Relationships
- Preview the Report
- Add a Report Title
- Align Fields

### Lesson 2: Displaying Data in a Report

- Find Data
- Sort Data
- Filter Data by Single Criteria

### Lesson 3: Grouping Report Data

- Insert a Group
- What is a Group?
- Add Summaries
- Change Group Options
- Add an Additional Group
- Format a Group Header
- Filter by Group
- Create a Top N Sort Group
- What is a Top N?

### Lesson 4: Building Formulas

- Write a Formula
- Operators and Formula Workshop
- Edit a Formula
- Group by Formula
- Delete a Formula
- Build a Filter by Multiple Criteria
- Modify a Filter with Multiple Criteria to Create an OR Condition
- Create a Parameter Field
- What is a Parameter Field?
- Write a Formula that Incorporates Null Fields

### Lesson 5: Formatting Reports

- Remove White Space
- Insert Page Header/Footer Data
- Special Fields
- Add Borders and Lines
- Change the Background Color
- Change the Margins

### Lesson 6: Enhancing Reports

- Create a Section Containing a Watermark
- Reasons to Create Sections
- Insert Objects Using Object Linking and Embedding
- Object Linking and Embedding
- Modify Format Based on Data Value
- Conditionally Suppress Data
- Boolean versus Attribute Formatting
- Insert Hyperlinks
- What is a Hyperlink?
- Hide Blank Report Objects

### Lesson 7: Creating and Modifying Pie Charts

- Create a Pie Chart with a Drill-down
- Chart Types
- Chart Layouts
- Chart Expert
- Chart Elements
- Drill-down in a Chart
- Modify Chart Text
- Format a Chart
- Present a Chart by Group

### Lesson 8: Distributing Data

- Export to PDF
- Export to Excel
- Export to an Access Database
- Create a Report Definition
- What is a Report Definition?
- Create Mailing Labels
- Report Creation Wizard