

Course Overview

In this two-day course, you will learn the more advanced features of Crystal Reports XI. You will learn how to use conditional formatting on multiple sections for presentation or for conditional messages. You will learn how to compute Running Totals that correctly reflect the data on the surface of a given report, and do not present the underlying dataset. You will learn how to create parameter reports that gather input and present data for Text, Number or Data fields. You will learn how to use the parameter data gathered before the report runs in filtering records, creating groups, sorting data or presenting conditional messages. You will learn about the Alerts feature which can provide filtered reports based on conditions that exist after a report runs, plus can generate Alerts that data is present and needs evaluation. You will learn about creating linked and unlinked sets of reports referred to as subreports to present related or unrelated data. You will learn to customize groups in the report that do not exist in the database, plus how to customize the group tree or group names based on a field or formula. You will learn about the advanced formula features of Crystal Reports, including how data is evaluated in passes, and the use of variables to carry data from section to section. The power of Cross Tab reports is covered in detail, including creating, formatting, and creating charts to accompany the Cross Tab report. You will also learn about report templates, how to apply them, and how to create your own templates.

Courses in the Crystal Reports Series

Crystal Reports Level 1
- 2 days -

Crystal Reports Level 2
2 days -

Course Preparation

Prerequisite: *Crystal Reports - Level 1* or equivalent experience.

Course Topics

Getting Started

- Review of Planning a Report
- Creating the Report
- Placing Fields on the Report
- Creating the Formulas
- Advanced Grouping
- Selecting Certain Records
- Hiding and Suppressing Sections

Power Formatting with Multiple Sections

- Using Multiple Sections in Reports
- Using the Section Expert to Work with Sections
- Conditionally Formatting Multiple Sections
- Advanced Drill Down Group Level

Using the Running Totals Feature

- Understanding Running Totals
- Creating Running Totals to Fix Report Problems
- Conditional Running Totals to Present Messages

Prompting with Parameters

- Parameter Field Considerations
- Creating Parameter Fields
- Using a Parameter to Select Records
- Refreshing and Changing the Data
- Creating a Dynamic Value List from the Database

- Exporting and Importing a Pick List
- Creating Parameters for Text Fields
- Allowing Multiple Values in Parameters
- Using Multiple Parameter Fields in Reports
- Using a Date Range in a Parameter
- Using a Number Range in a Parameter
- Using Parameters to Present Conditional Messages
- Sorting with a Parameter
- Grouping with a Parameter
- Cascading Parameters that Present Relational Data

Using Advanced Formula Features

- Understanding How Crystal Reports Processes the Data
- What Is a Pass?
- Using Evaluation Time Functions
- Working with Variables
- Declaring a Variable
- Assigning a Value to a Variable
- Using a Variable in a Formula
- Variable Scope
- Separating Statements in Complex Formulas
- Solving Parameter Problems with Advanced Formulas

Rev 1/26/09

--continued on next page

Using Sub reporting as a Workaround Solution

- Understanding Subreports
- Unlinked versus Linked Subreports
- Creating an Unlinked Sub report
- Linking a Subreport
- Performance Considerations for Linked Subreports
- Creating On-Demand Subreports
- Creating Hyperlinks

Creating Powerful Groups

- Using the Group Expert
- Using a Field Name to Customize the Group Name
- Using a Formula to Customize the Group Name Field
- Creating Custom Groups Outside the Database
- Grouping on a Formula Field
- Using Group Selection Formulas
- Grouping Hierarchically in a Self Join Table

Working with Cross-Tab Reports

- Understanding How Cross-Tabs Affect Your Data
- Creating a Cross-Tab Report
- Creating a Cross-Tab with Multiple Rows or Columns
- Applying a Formatting Style to the Cross-Tab
- Customizing the Cross-Tab Format
- Changing Background Colors
- Formatting Individual Cells
- Changing the Summary Operation
- Suppressing Rows, Columns or Totals
- Repeating Row Heading for Multi-Page Cross-Tabs
- Using Alias Names for Column and Row Headings
- Charting Cross-Tabs

Rev 1/26/09

Report Alerts

- What are Report Alerts
- Creating Report Alerts to Run at Report Time
- Generating New Reports from Alerts
- Enabling and Disabling Alerts
- Ideas for Usage

Report Templates

- Applying a Template and the consequences
- Template Considerations
- Creating Your Own Basic Templates
- Creating Your Own Advanced Templates
- Inserting Template Fields for Placement
- Formatting Template Fields

Rev 1/26/09