

Crystal Reports Training Course Outline | for ACCPAC

Full Crystal Reports training manuals are provided (at no extra cost)

Duration

2 full days
9am – 5pm (1 hour lunch)

Overview

This two-day course is designed for ACCPAC administrators who need to quickly become proficient in creating and modifying Crystal Reports for use in the ACCPAC system. Some of the topics include creating a basic report, record selection, sorting, grouping and summarizing, basic queries, exporting to other formats, and formulas.

Who Should Attend

Information professionals (e.g. in the IT department) or power ACCPAC users who need to quickly become proficient in creating and modifying reports within their organisation.

Prerequisites

Students must have a working knowledge of Windows applications and the ACCPAC accounting system. Basic knowledge of database concepts such as tables, fields and records is also necessary. The prerequisite assignment for this course is to review Chapter 5 and 6 of the Crystal Reports User's Guide.

What You Will Learn

Report Design

- Planning an ACCPAC report
- Creating a new report
- Exploring the report design environment
- Placing objects on your report
- Previewing and saving your report
- Positioning and sizing objects
- Formatting objects
- Using Text Objects

Record Selection

- Using the Select Expert
- Using the Select Record options
- Defining the Select Expert's features
- Understanding saved vs. refreshed data
- Setting additional selection criteria
- Applying Record Selection on date fields
- Modifying record selection with the Formula Editor

Sorting, Grouping and Summarising

- Sorting Records
- Grouping Records
 - Modifying Groups
- Grouping on Date or Date/Time fields
- Summarizing
- Using Grand Totals

Grouping Options

- Creating nested or multiple groups
- Reordering groups
- Applying specified order grouping
- Using the Top N/Sort Group Expert
- Creating a group selection based on summary information
- Grouping data hierarchically

Presentation Quality Reports

- Applying special formatting
- Importing pre-formatted data
- Using Special Fields
- Adding hyperlinks
- Inserting lines and boxes
- Inserting a picture

Text Objects

- Importing elements into text objects
- Combining Text Objects with Database Fields
- Combining Text Objects with Special Fields
- Formatting Text Objects

Linking

- Defining linking concepts
- Adding/removing ACCPAC databases from a report
- Defining ACCPAC tables and fields
- Using Smart Linking
- Working with links
- Working with the ACCPAC data dictionary

Formula Basics

- Working with the Formula Editor
- Using basic calculations
- Using string manipulation
- Applying basic date calculations
- Applying Boolean formulas

Applying If Then Else formulas
Using Running Totals

Conditional Reporting

Using the Highlighting Expert
Using conditional formatting

Section Formatting

Changing the size of a section
Formatting sections with the Section Expert
Creating a Summary report

Charting

Creating a chart using the Chart Expert
Drilling down on a chart
Charting on summary data
Charting detail or formula data
Customizing a chart

Report Distribution

Exporting your reports
Viewing reports over the web
Saving reports to Crystal Enterprise
Adding Crystal Reports to the ACCPAC desktop