

Course Agenda

Introduction to Crystal Reports

Sage 300 CRE | Instructor: David Hardy

Course Overview

This 4-hour course is designed for participants who have little or no experience with Crystal Reports and want to start creating custom report designs with Sage 300 CRE Software.

System Requirements: Workstation MUST have Crystal Reports accessible and connected to Sage 300 CRE data.

Agenda

- **Get Started with Crystal Reports**
 - Obtain Crystal Reports
 - Configure the ODBC connection
 - Connect to your Sage 300 CRE database
 - Open a report and work with data fields
- **Plan & Design a Report**
 - Set Crystal Reports options
 - Evaluate report specifications and plan the report
 - Create a new report and use the Database Expert
 - Add fields, formatting and graphical elements to the report
- **Setting Criteria & Data Relationships**
 - Use the Select Expert
 - Set criteria on the report
 - Link tables
 - Set join types correctly

- **Sorting, Grouping & Summaries**
 - Sort data on the report
 - Group report information
 - Add group totals and grand totals
 - Add running totals
- **Working with Formulas**
 - Create a formula using correct syntax
 - Understand order of precedence and syntax rules
 - Check formulas for errors
 - Copy and delete formulas
- **Functions & Special Characters**
 - Add functions to formulas
 - Understand data type issues
 - Use functions to convert data types
- **Formatting Fields & Sections**
 - Suppress zero values
 - Format fields conditionally (according to their value)
 - Change section formatting
 - Format sections conditionally
 - Suppress records conditionally