

Beginning Crystal Reports

Who: The beginning to intermediate Crystal® report user, and one who is already familiar with Sage Timberline Office's Report Designer and database. We recommend that participants attend the Beginning Report Designer class prior to attend this Crystal class, in order to build a familiarity with the Timberline database structure.

Content: Basic design including record selection, linking, field selection, conditioning, sorting, grouping and summarizing, totals and formulas. Formulas cover several of the most often used functions and operators for Timberline reports. New as well as current Crystal® report users will benefit from this class as it is geared toward the Timberline database. Note: this class focuses the Accounts Payable module. While it does not specifically address use of Crystal® with PO/IV, Service Management and other Timberline modules, it does give a good overview of how to use Crystal generally with Sage Timberline Office.

Credit: CPAs successfully completing this course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

Prerequisites: We strongly recommend that participants have attended a Beginning Report Designer class to help build a familiarity with the database structure and field locations.

Class Rates:

Two Days: \$800 1st participant, \$700 each additional

Registration:

Please fax completed registration form to 704-394-0052 or register online at www.cisinfo.com/classroom.htm for more information please call 704-393-0038 x1142

Course Outline

Getting Started With Crystal Reports

- Preparing the Data Folder
- ODBC Settings
- Navigation Techniques
- File and Design Options

Plan and Design a Report

- File Options
- Creation of New Report
- Adding Formatting, Lines and Pictures to your report

Setting Criteria and Data Links

- Report Criteria
- File Linking
- Join Types

Sorting and Grouping

- Group Expert
- Sort Expert and Sort Hierarchies
- Summaries
- Running Totals

Formulas

- Creating New Formulas
 - Syntax Rules and Error Correction
- If-Then-Else Formula
- String Formulas

Functions and Special Formulas

- Count Function
- Conversion Functions
- Special Fields

Formatting Fields and Sections

- Suppress Zero Values
- Apply Font Styles Conditionally
- Working with Section's Background Color
- Conditional Formatting of Sections

Parameters and Charts

- Add Parameters to the Report
- Add Chart to the Report

Integration with Sage Timberline Office

- Add Report to Reports Menu in Timberline
- Use a Report as the Desktop Home Page
- Special Formulas and Functions
 - tsDataFolder
 - tsDesignMode
 - tsAsk
 - tsLetterhead
- Introduction to Advanced Reports
 - Variables and Subreports