



Texas Skyward User Group Conference

Session Topic: Crystal Reports – Financial Management

Presenter Name: Wade Bertram



Crystal Report – Financial Management



During this session, you will learn the basics of how to create reports in Financial Management using our Crystal Report writing options.

- The “What, Why and When” of Crystal Reports
- Creating a Crystal Report
 - Selecting your database
 - Adding tables/fields
 - Grouping/Sorting
 - Record Selection
 - Calculations
 - Formatting
- Tools in Skyward to help with report writing
 - Data Diagrams
 - Data Dictionary
 - Alt-F2
- How your end users run the Crystal Reports through the software

What, Why and When of Crystal Reports



- Aesthetically pleasing reports
 - Board Reports
 - Vendor Reports
 - Fund Balance Reports
 - Balance Sheet/Operating Statement

- Report on unrelated subjects within the same report or line

- Create reports that are not possible in Data Mining or Skybuild
 - Customized layout to meet your needs
 - Access to all database fields
 - Customized filters, user prompts etc.

Getting Started with Crystal Reports



- Database Connection
 - ODBC Connection to Skyward
 - Connect to Access/Excel etc.

- Table based
 - Add Tables
 - Link Tables (Inner Join vs. Left Outer Join)
 - Add Fields
 - Grouping/Sorting
 - Filtering

- SQL Queries
 - Common reasons for using a SQL Query.
 - Speed issues with table based report
 - Add filters on left joined tables
 - Need to force groups to display regardless if data exists for the group
 - Need to join extent field data to another table
 - Sub Query needed to return result, commonly done through sub report

Crystal Reports Design



- Formatting options
- Conditional Formatting / Suppression
- Paging Options
- Formulas
- Parameters (Prompts)
- Summaries
- Sub-reports

- Types of Reports
 - Standard View/Print
 - Export (PDF, CSV, Excel etc.)
 - Graphs / Charts
 - Cross Tab
 - Drill Down Reports

- Running Crystal Reports through Skyward
 - Upload Reports to Custom Reports
 - Custom Report Security
 - Schedule reports from Print Queue

- Reporting Tools in Skyward
 - Database Diagrams
 - Data Dictionary
 - ALT-F2
 - Shift-Ctrl-Alt-F12



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THANK YOU FOR ATTENDING!

