

# COURSE OUTLINE

## Sage 300 ERP Crystal Reports Introduction



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## Course Outline

Crystal Reports enables custom reports to be developed which are ideally suited to the business needs of your company. With Crystal you can access corporate knowledge and leverage business insight to make better-informed decisions. During this **introductory** session the user will learn how to create and modify reports, sort, select, group and summarize records and write basic queries.

### Course duration

This course is scheduled for two (2) days from 9:00 till 16:00.

### Course pre-requisites

A working knowledge of windows conventions. Basic knowledge of database concepts such as tables, fields and records. Working knowledge of MS Office.

### Documentation

The following documentation is included with the course

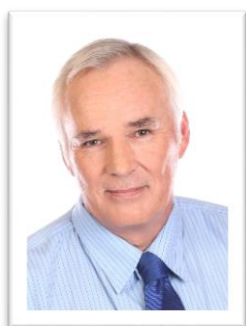
- Sage 300 ERP user guide
- User competency assessment
- Certificate of attendance

### Who should attend?

All Sage 300 ERP users that have no accounting background, or need to update their skills

## The Facilitator

### Werner Muller



Werner Muller has been active in Sage 300 ERP for twelve years and in this time has obtained a lot of practical and theoretical experience - with 30 years of accounting experience.

He comes from a corporate and training environment where he was a junior lecturer for statistics and applied maths. He completed his articles at Theron van der Poel and attended the University of Pretoria where he studied B-Com Auditing. He is dedicated to training since it is his passion to deliver effective meaningful skills and to uplift all the students coming through our AccTech Systems training centre.



## Topics Covered

### REPORT DESIGN

- Planning a 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 fields (date/time etc)
- Summarizing
- Using grand totals

### GROUPING OPTIONS

- Creating nested or multiple groups
- Re-ordering 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

### LINKING



- Defining linking concepts
- Adding/removing databases from a report
- Using smart linking
- Working with links

#### 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

## Venue Details

We have training facilities in Centurion.

### Centurion

1001 Clifton Avenue  
Lyttelton Manor  
Centurion



## **For bookings or more information**

For bookings or more information please feel free to contact us at 0861 11 1680 or e-mail [training@acctech.biz](mailto:training@acctech.biz)

For the latest event schedule visit our training page on [www.acctech.biz](http://www.acctech.biz)

