

## Sage 300 Crystal Reports Introduction

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**Address**  
PO Box 25334  
Monument Park  
0105  
South Africa

**Head Office & Training**  
1001 Clifton Avenue  
Lyttelton Manor  
Centurion  
South Africa

**Tel:** 0861-11-1680  
**Fax:** 0866-838-922  
**e-mail:** [sales@acctech.biz](mailto:sales@acctech.biz)  
**Web:** [www.acctech.biz](http://www.acctech.biz)



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## A. Course Outlines

### 1. Sage 300 Crystal Reports Introduction

#### Course description

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 one day 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 user guide
- User competency assessment
- Certificate of attendance

#### 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



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- 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



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## B. Contact Details

### 1. Location for training

We have training facilities in Centurion or training can be done on-site on request.

Physical Address:

Centurion  
1001 Clifton Avenue  
Lyttelton Manor  
Centurion

### 2. For bookings or more information

For bookings or more information please feel free to Marili van Niekerk us at 012 640 2600 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)



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