

CREATING CRYSTAL REPORTS FOR CENTRIS

Making Your Reports Come to Life

RM Centris is the backbone application to our integrated MIS solution for Local Authorities and offers comprehensive features surrounding the storage, management and reporting of authority-wide pupil data. Whilst the standard reports supplied with Centris cover many of the generic Local Authority requirements we also provide links with Crystal - one of the foremost report design engines on the market today.

Based entirely on the RM Centris database, this course will empower users to construct their own professional reports and perform extended data analysis using Crystal. As well as running the reports in isolation, you will also learn how to embed them within Centris for all users to access. During this comprehensive two-day course, delegates will learn how to use foundation and intermediate features of Crystal and become confident 'report builders', and all of this achieved using the Centris source data.

What's Covered?

- An overview of the product's core features
- Creating simple reports
- Sorting and selecting records
- Grouping and summarizing features
- Parameter fields
- Using the Report Expert
- Linking Tables
- Working with formulas
- Formatting report sections
- Distributing and exporting data

Course Benefits

Offering a whole new approach to the construction of bespoke reports and giving control for their production right back with the user.

Empowering Local Authority users to create their own value-added reports, thus helping to streamline their processes.

Gaining confidence in bringing together pupil-centric information from across the different Centris modules.

Exploring the concept of relational data tables and how the Centris data structures dovetail together.

These newly acquired techniques can be used to perform extended data analysis of Centris, simply and effectively .

Who Should Attend?

The course is aimed at all local authority teams who use our Centris module suite and have the requirement for extended data analysis and reporting.

As we start at foundation level, no previous knowledge of Crystal Reports is assumed. However, even those with some experience of working with the product will quickly move into new topic areas and gain invaluable tools and techniques for professional report construction. On successful completion of the course, delegates will become report 'builders' and be able to construct reports confidently and easily.

All delegates registering for the course should possess both relevant computer experience and a good working knowledge of Centris.

Course Outline

Lesson 1: An overview of the product's core features –

- Examining the application's capabilities
- Reviewing key design concepts
- Defining the program default settings
- Navigating through the integral help system

Lesson 2: Creating simple reports –

- Creating a new report for the first time
- Introducing the report design sections
- Previewing the report and using formatting features
- Adding special fields to the report
- Inserting drawings and images

Lesson 3: Sorting and selecting records –

- Sorting records using single or multiple criterion
- Introducing 'Select Expert' to limit the inclusion of records
- Applying 'And'/'Or' statements to selection criterion
- Working with composite formulas

Lesson 4: Grouping and summarizing features –

- Defining group levels and options
- Working with totals and subtotals
- Inserting summary/percentage fields
- Using the 'Group Expert' features

Lesson 5: Parameter fields –

- Creating and utilising parameter fields
- Creating associated parameter pick lists

Lesson 6: Using the 'Report Expert' –

- Creating new reports using the Standard Report Expert
- Creating new reports using the 'Cross Tab' Expert
- Editing 'Expert' reports

Lesson 7: Linking Tables

- Introducing the basic concepts of relational databases
- Incorporating multiple tables into a single report
- Exploring the 'Visual Linking Expert'

Lesson 8: Working with formulas –

- Understanding formula components
- Creating new formulas using the 'Formula Editor'
- Applying changes to formulas

Lesson 9: Formatting report sections –

- A review of sections – their role and operation
- Resizing sections in 'Design View'
- Using the 'Section Expert'
- Creating summary and drill down reports

Lesson 10: Distributing and exporting data –

- Introducing the data export options
- Exporting a report into MS Office
- Creating a report using spreadsheet data
- Viewing reports on-line through a web browser

Contact Us

Should you require further clarification on the course content, or would like to register your interest, please contact our Training Administrator, Susan Marsh, on (01235) 401842 or via e-mail (see address below).

An RM SMS training course delivered in association with **it training solutions**

