

103-eT: Pivotal 5.9 Report Writing

Overview

This intermediate level, online course, taught over 2 days in daily three-hour sessions, is recommended for customers who want to or are currently:

- Using Pivotal CRM in a LAN environment.
- Training end users to work with Pivotal CRM.
- Supervising or supporting end users.
- Working as an end user.

Audience

End Users, Power Users, Customizers, Administrators

Prerequisites

Required: Courses [118-eT: Pivotal 5.9 Technology Foundations for End Users](#) or [115-eT: Pivotal 5.9 Technology Foundations for Customizers and Administrators](#) or experience with CRM. An understanding of relational databases is preferred.

Topics Covered

Database Review

- Define the term 'database'.
- Use relational database terminology.
- Identify database join information.

Creating a Report in eRelationship

- Use the Report Definition Window to create simple reports.
- Transport Reports between eRelationship and Crystal Methodologies.

Using Crystal Reports

- Identify components in Crystal Reports.
- Create simple reports in Crystal.
- Define basic formatting using the Format Editor and the Section Editor.

Advanced Reporting Features

- Visual Link Expert: Add additional tables to existing report.
- Visual Link Expert: Identify a primary table and a lookup table.
- Manipulating Records: Apply sorting and grouping to the report data.
- Charting: Create charts of different types.
- Formulas: Create String manipulation, Date Functions, Data format conversion, IF then Else, Summaries, Subtotals, and Grand totals formulas.
- Subreports: Discuss the difference between a subreport and a primary report.
- Additional formatting: Apply formatting and formulas to report data.