

CREATING CRYSTAL REPORTS FOR RM FINANCE

Making Your Reports Come to Life

RM Finance is one of the flagship products for RM School Management Solutions and recognised as an essential management information tool used in the financial accounting practices of schools worldwide. Its ease of use and uncomplicated reports always appear near the top of every school's list of treasured features. Wouldn't it be good, then, if you could add a collection of your own favourite reports to augment those you already use on a daily basis? Well, now you can – using Crystal Reports. This application is one of the foremost report design engines available on the market today and well established within the education sector.

Based entirely around the RM Finance database, this course will empower delegates to both construct their own reports and perform extended data analysis using Crystal Reports. Most importantly, these reports can be embedded into the RM Finance reporting area, not just for use within your own data file but also for onward distribution to other school users. It is also worth noting that school users do not need access to the Crystal Reports application in order to successfully run these reports.

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 reports for onward distribution to schools.

Gaining confidence in bringing together financial information from across the RM Finance database. These newly acquired techniques can be used to perform extended data analysis of RM Finance, simply and effectively .

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

Developing value-added reports that can be taken away and used immediately within the workplace.

Who Should Attend?

The course is aimed primarily at local support teams who will be offering financial services to schools on the RM Finance product. 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 RM Finance.

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**

