

Conditional Formatting

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Learning Outcomes

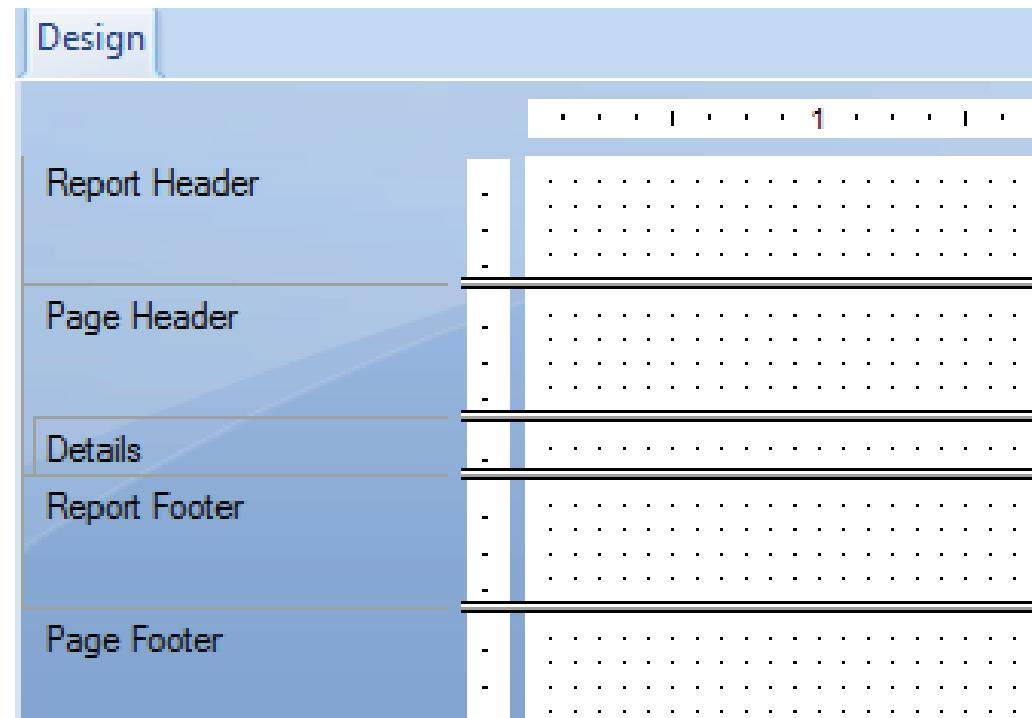
- Using the Section Expert to Work with Sections
- Formatting Sections Conditionally
- Conditionally Formatting Fields

Conditional Formatting

- Conditional formatting can be used at various levels in Crystal Report. As opposed to absolute formatting which is a fixed way of formatting objects, conditional formatting only applies the formatting based on certain exceptional events.
- You can apply conditional formatting to any object as long as you see the  icon. Conditional formatting are often used in Sections, which are defined areas within a report.

Conditional Formatting

By default, Crystal Reports gives you five design areas to use when building your report: *Report Header, Page Header, Details, Report Footer, and Page Footer*.



Conditional Formatting

Each area contains only a single section when you first begin your report. There are certain reporting tasks you can perform most efficiently by creating multiple sections within an area, such as:

- Putting conditional messages to appear under certain conditions
- Formatting objects/sections differently based on field values
- Alternating background colors on a row-by-row basis
- Adding blank lines under specific conditions, e.g. every fifth row
- Managing the *Underlay* feature when some objects should not underlay.

Conditional Formatting

Multiple Sections can be useful in the following cases:

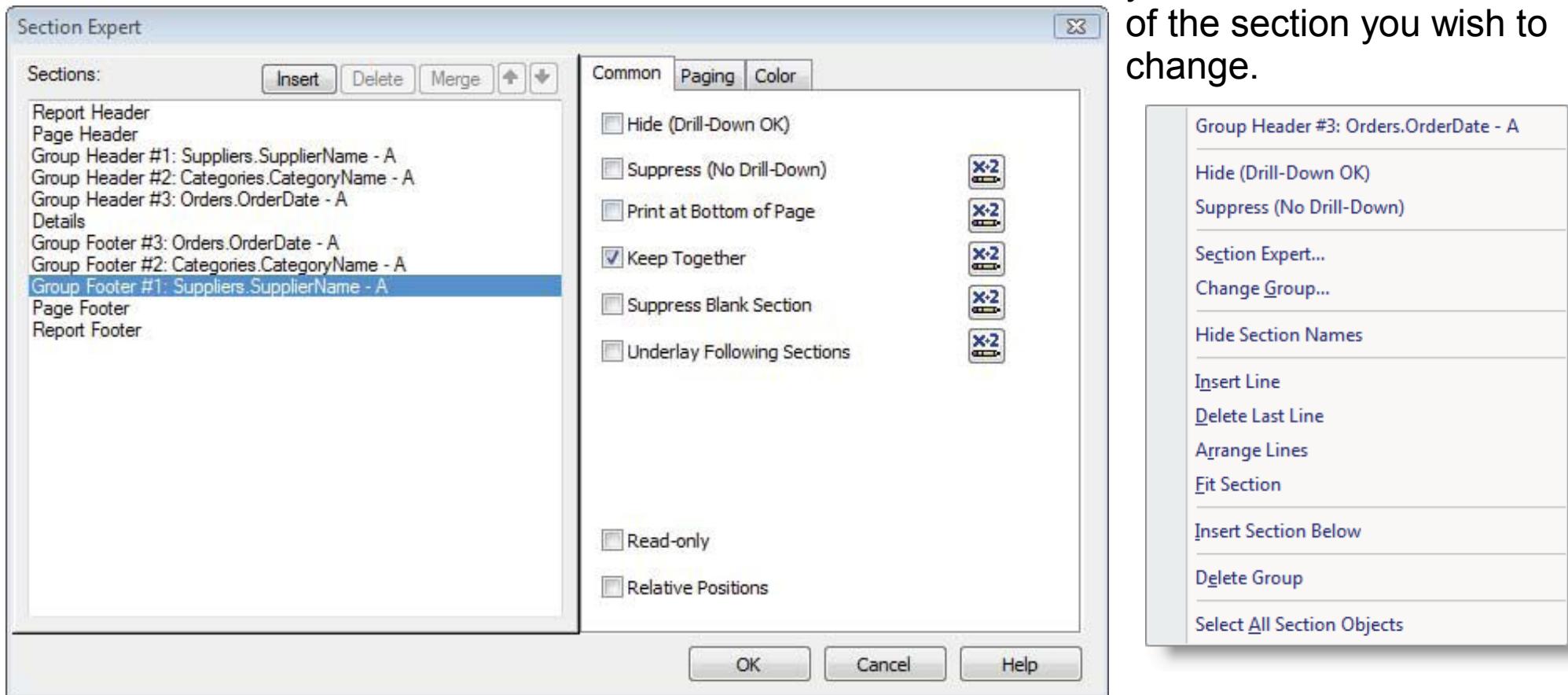
- Suppose you want to display current order amounts in the Details section. If the customer has outstanding amounts you want to display them as well. You add an additional Details section (b) and conditionally format it to display only if there are outstanding order amounts.
- Your report prints customer invoices and a list of the orders in the last month. You want to include a nice letter to thank paid up customers for keeping their account current. For overdue customers, you want a more forceful letter asking them for payment. You can create two Group Header sections and conditionally suppress each one depending on the condition of the account. The Detail section would show all orders currently not paid, along with their due dates.
- You are printing an employee listing grouped by Employee Name. You have information on each employee, including address, telephone, start date and sales for the last month. You also have a field displaying the employee's picture you want shown beside the printed data. You cannot put it in the Employee Name group header because it prints above the rest of the data and takes up too much space. So, you create a second group header section, put the picture there, and then turn on "Underlay Following Sections". The picture will then print beside each employee's data.

Conditional Formatting

- In the Section Expert, you can easily insert, merge and delete sections. You can also move sections within an area and conditionally format sections. You can open the Section Expert in three ways:
 - Choose Report | Section Expert...
 - Click the Section Expert icon  on the Expert toolbar
 - RIGHT-click the section name you want to format, then choose Section Expert from the shortcut menu
- In the Section Expert, you can select the section you want to work with in the *Sections:* list, and then use the Insert, Delete, or Merge buttons to manipulate additional sections. The arrow buttons allow you to move sections within an area.

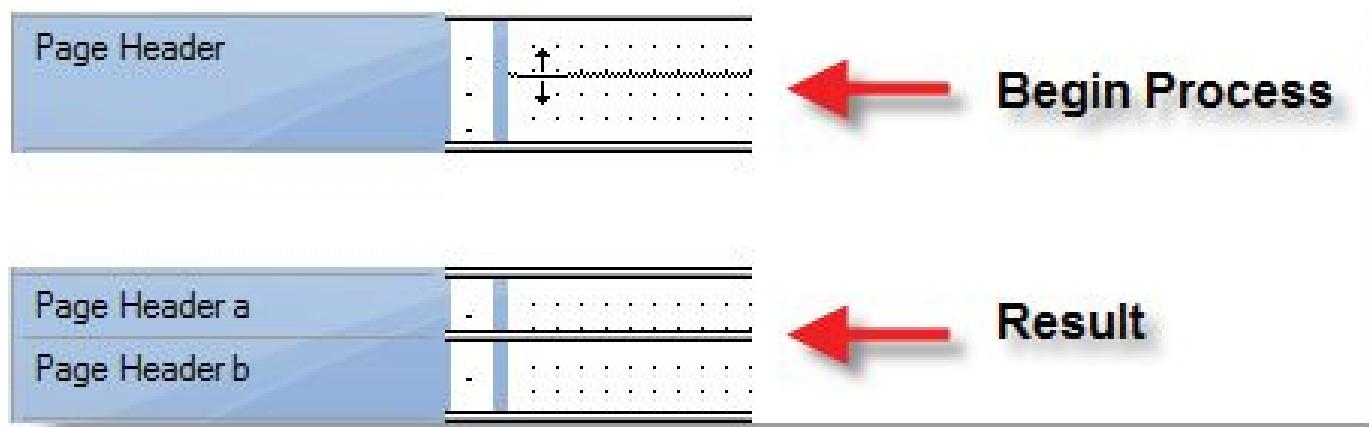
Conditional Formatting

or RIGHT-Click on the left side of the screen where you see the section name of the section you wish to change.



Conditional Formatting

- Crystal Reports has a true shortcut for inserting a section below an existing section. LEFT-click on the vertical separator bar in the section you wish to add. Hold down the mouse button until the mouse pointer changes to a double-headed arrow with a single line horizontally separating the arrows. Drag the line up or down and release. This method of inserting a new section keeps all the formatting from the section above.



Conditional Formatting

1. Create a report using the **Employees** and **Orders** tables in **Northwind2008**.
2. Group by the **LastName** field from the **Employees** table. Check on the *Keep Group Together* option in the **Group Options** tab.
3. Insert **OrderID**, **OrderDate** and **OrderAmount** fields from the **Orders** table. Format the **OrderDate** field to display only the date
4. Summarize the **OrderAmount** field for all levels including grand total
5. Resize the **GH1** section to about. **.5"** tall. Move the field headers down to the **GH1** section
6. Create a **Record Selection Formula** filter to limit records to only orders in 2008. The formula should look similar to the following: `{Orders.OrderDate} >= Date(2008,1,1)`
7. Place a text object into the **PH** section with title **Employee Sales Orders for FY 2008**.
8. Suppress the **RH** section.
9. Add the **Photo** field from the **Employees** table into the **GH #1** section. Be sure to place the field to the right of the field headers
10. Save the report as **Employee Sales Orders for 2008.rpt** and preview the report.

Conditional Formatting

Employees Sales Order for FY 2008

Buchanan

OrderID OrderDate

OrderAmount

10,954	03/17/2008	\$1,902.10
10,870	02/04/2008	\$160.00
10,872	02/05/2008	\$2,166.80
10,841	01/20/2008	\$4,581.00
10,823	01/09/2008	\$3,107.50
10,851	01/26/2008	\$2,740.00
10,812	01/02/2008	\$1,852.00
10,922	03/03/2008	\$742.50
10,866	02/03/2008	\$1,461.60
10,899	02/20/2008	\$144.00
10,874	02/06/2008	\$310.00
11,043	04/22/2008	\$210.00
10,869	02/04/2008	\$1,630.00



\$21,007.60

Callahan

OrderID OrderDate

OrderAmount



Conditional Formatting

The report would look better if the photo displayed beside the records. You can underlay the GH #1 to accomplish this. However, if you underlay the entire Page Header the Group Name field and field headers will also display over the order information. We need to place the photo in a separate section below the Group Name field and field titles and then underlay GH #1b. This can be done by effecting the steps below:

11. Insert a section below the **GH #1** by right clicking the words **GH #1** and choosing *Insert Section Below*. Move the photo into **GH #1b**. Right click in **GH #1a** and choose *Fit Section*
12. RIGHT click the section name for **GH #1b**, then choose *Section Expert...* Notice the Section Expert now displays both Report Header sections.
13. Click the *Underlay Following Sections* check box in the **Common** tab, and then click **OK**.
14. Save and preview the report.

Conditional Formatting

- For readability, we usually alternate the background of every other records. This can be done very easily by creating a section in the D- Section.

1. RIGHT click the **Details** section name, and then choose *Insert Section Below*.
2. Draw a box to fit **Details b** in height and make it slightly wider than the data fields in the **Details a** section. Your Details sections should look similar to the following:

Details a	OrderID	OrderDate	OrderAmount
Details b			
Group Footer #1:			OrderAmount

3. If we preview, we see the **Details b** appears with every record. We now need to suppress it every other record. RIGHT-click the **Details b** section name from **Design** and choose *Section Expert*
4. Click on the X+2 button next to the Suppress (No-Drill-Down) option. The Format Formula Editor opens. Enter the following formula:
RecordNumber Mod 2 = 0
5. *Save and close the formula, but do not close the Section Expert*
6. *In the Sections: list, select the **Details a** section and in the **Common** tab check on the Underlay Following Sections option and click **OK***

Conditional Formatting

Task 8a

- Create a report as faithfully as this one.
- Database is Northwind2008.mdb.
- Table is Customers.
- Save your report as 8a.rpt