



## **SDS Report Training Outline Example**

---

Below is a basic outline of the SDS Report Training for Student or Finance SDS Systems. If you have questions about the training please email [jennifer@schooloffice.com](mailto:jennifer@schooloffice.com) .

### **Getting Started**

In getting started you will learn some basic settings that need to be changed for creating SDS Reports and how to convert custom reports you may have from previous SDS systems to your new SDS system.

- › Default Settings
- › Convert Custom Reports from Previous SDS System to Current SDS System
- › Open Custom Report
  - ▭ Setting Datasource Location
  - ▭ Table Verification
  - ▭ Set Location Same as Report
  - ▭ Linking
  - ▭ Replace the old report name with file path and name.
  - ▭ Save Custom Report

### **Keys to Reporting in SDS**

This section kicks off the training with showing you SDS Reporting capabilities and will provided you with knowledge of the Crystal Reports Viewer and the SDS database. By the end of the section you will have an understanding how everything works together with SDS Reporting.

- › Introduction to Report Production
- › What is Crystal Reports?
- › Reporting Capabilities in SDS
  - ▭ Standard Reports, Quick/Flash Reporting
- › Quick View of a SDS Standard Report
- › Steps to creating a Basic Customization
- › Steps before Creating a Report
- › Becoming Familiar with your SDS Database
- › Hints to making Reporting Simple

### **How to Generate a New SDS Report**

In this section you will learn how to add your SDS database to a report and how to setup a report by adding fields, text etc. to complete your report. This process will give you an idea of how a report is created and what steps you need to take to create your own reports.

- › Create a Blank SDS Report

### **Customize a SDS Standard Report**

You will learn how to open up a SDS standard report, modify it, save it and run it through SDS.

- › How to Customize a Standard SDS Report
- › What to think about before Customizing a Report
- › Hands on Exercise



## Tools

In this section you will learn more advanced features to apply to your already created SDS Report.

- > Grouping and Section Expert
- > Linking
- > Formula Creation
- > Total/Count Fields
- > Parameter Field