

The basic steps to setting up a halfile report using Crystal Reports is as follows:

1. Go into halFILE and make sure it knows where to find the Crystal Reports designer. This is defined in the halFILE Administrator on the General tab of the Tools_Options menu. Here, you designate the location of CRW32.EXE. (Note: Crystal Reports Designer must be installed).
2. Perform a sample search within halfile to pull up some documents with which to design your report.
3. At the bottom of the search hit list you will find a **REPORT** button. Click that to bring up the reports screen.
4. Click **INSERT REPORT** to add a new report.
5. The system adds a 'New Report 1' report. Highlight that entry and click **EDIT**. This brings up the screen where you give the report and name and a location.
6. Change the Description to whatever you want the report to be called.
7. If you want a card report, printed on continuous fed index cards, check the "This report uses card format" option. Normally, however, this box is left unchecked.
8. Enter the path and file name of the report in the Path and File Name box. Crystal Reports files have an extension of .RPT so you should use that. In a moment when you design your report in Crystal, this is the path and filename to save the report file to. Click OK to save this information then click Edit Report to return to the set up screen.
9. Click the **DESIGN** button which should load Crystal. Note that sometimes Crystal will be minimized in the task bar (usually because it was not registered and is displaying the registration screen).
10. At this point, different Crystal versions have different menus and options so the following may not be exactly what you see. But it should be close. Select **File | New** to build a new report. We suggest using the Report Wizard option to take you through the steps to designing the report.
11. Typically, the report is "Standard."
12. The Data form is displayed to select the database files to use, click the plus symbol next to the Create New Connection item. Then click double click ODBC to option up the dialogue for selecting the File Data Source (DSN). Click "Find File DSN" then click the search symbol on the right which lets you find the DSN file to use. In the file name box, enter %temp% and hit enter to jump to the temp folder where we build the DSN files for reports. The database to use on the report will either be called SCHPR000.MDB (for non-card formats) or SCHCR000.MDB (for card formats). Locate that file in your Windows temp folder that is normally c:\windows\temp. Find and select "halreports.dsn." This returns to the Data Selection box. Click NEXT and FINISH to complete the Data Selection.
13. In the list of available data sources, double click either halreport.txt or hitlist.txt to place it in the list of selected tables. Halreport.txt contains all the data for all the rows in your search while hitlist.txt includes only the data shown in the hit list grid. For example, if a document has 10 names, the halreport.txt will include all 10 names while hitlist.txt includes only the first name.
14. Click NEXT and select the fields you wish to appear on the report. These can be adjusted later.
15. Click NEXT and, if you wish to group records by a certain field or fields, select those. For example, if you wish to sort records by date with a subtotal for each month, you would group by the date field.
16. Click NEXT and, if you wish to subtotal on certain fields, select those.
17. Click FINISH and a preview of the report is shown. Above the preview, click the Design tab to go to the report designer where adjustments can be made. Here, the 'Details' section is where you place and size data fields on your

report. The Page Header is where you place headings and report titles that should appear on every page. The Report header section is where you place headings and title which should appear only on the first page. If groups were selected, you will also find Group Headers and Footers where the group breaks appear and summary totals can be placed. With Crystal Reports you can drag fields onto the report and move them around, set the font size and color, etc. To see the fields not currently on the report, click the View-Field Explorer menu.

18. Once the report looks like you want it, save it to the report path and file name you specified back in halFILE. Then close out of Crystal Reports.
19. Back in halFILE, click the **DONE** button to exit from the Edit Report screen and return to the Reports screen. You should see your report in the list. You can double click the report to run it.
20. When you run a report, you will see a **Report Printing Utility** box appear at the bottom of your screen.
21. Click **Print Preview** to preview your report or **Print** to print the report. Click **Close** to close the report and the Report Printing Utility and return to halFILE. (You can also print from an icon inside the Print Preview screen.
22. If the report needs to be changed, return to Step 8 to Design the report. This time, when Crystal loads, you should be back into your report layout.

Hint: Once you previewed a report from halFILE, the report database has been built and you can stay inside of the Crystal Designer to see how the report looks using [File | Print Preview](#).

Related documents:

[Printing Search Criteria on a Report](#)

[Designing Crystal Reports – Advanced Tutorial](#)
