

README: Crystal Reports Files

Terminology

- **Template file**: A Crystal Reports file, with a .rpt extension. The template file contains no data, but is used to generate an output file.
- **Output file**: A file (.pdf, .doc, or .xls) that has been generated from the template file. The output file contains data, but cannot be used to generate a new report.

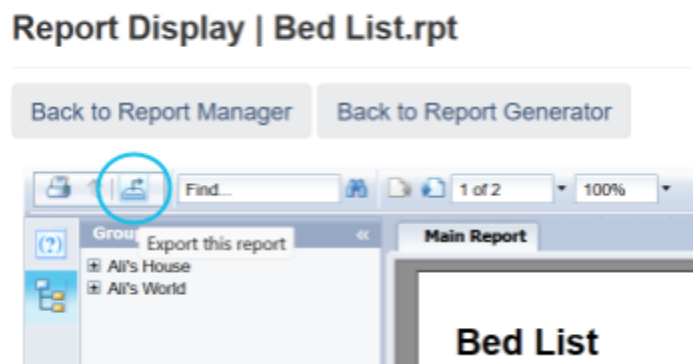
Generating an Output File: Method 1 (Easy)

With a **template file**, the easiest way to generate an **output file** is to upload it to your HIFIS 4 instance.

1. Log in to HIFIS 4
2. Use the Reports menu → Reports Manager → Add Report
3. Fill out the mandatory fields, then choose the .rpt file in the File to Upload field. Click Save.

The report is uploaded to your HIFIS 4 instance as a Custom Report. Go to the Custom Reports tab, locate the report you just created, and click the Generate button. Just like any other report in HIFIS, you may be prompted for parameters, and it may take a few minutes to load.

Once the report has been generated, click the Export button in the top left of the viewer. There you will be prompted to choose the file format (i.e. .doc, .xls, .pdf), then click OK.



Generating an Output File: Method 2 (Harder)

You can open a **template file** directly from your desktop if you have Crystal Reports installed. Simply open Crystal Reports and then use the File menu → Open, and locate the .rpt file. You'll be able to see the layout, and from here you can make minor formatting changes. However, if you want to generate an **output file**, you'll need to **change the datasource location**.

Changing the Datasource Location

Each **template file** includes with it a memory of the last database it connected to. So for example, files available for download from ACRE Consulting remember the ACRE Consulting database. When you open the **template file** in Crystal Reports and try to generate an **output file**, Crystal Reports tries to connect to the remembered database and asks for a username and password (which of course, you don't have).

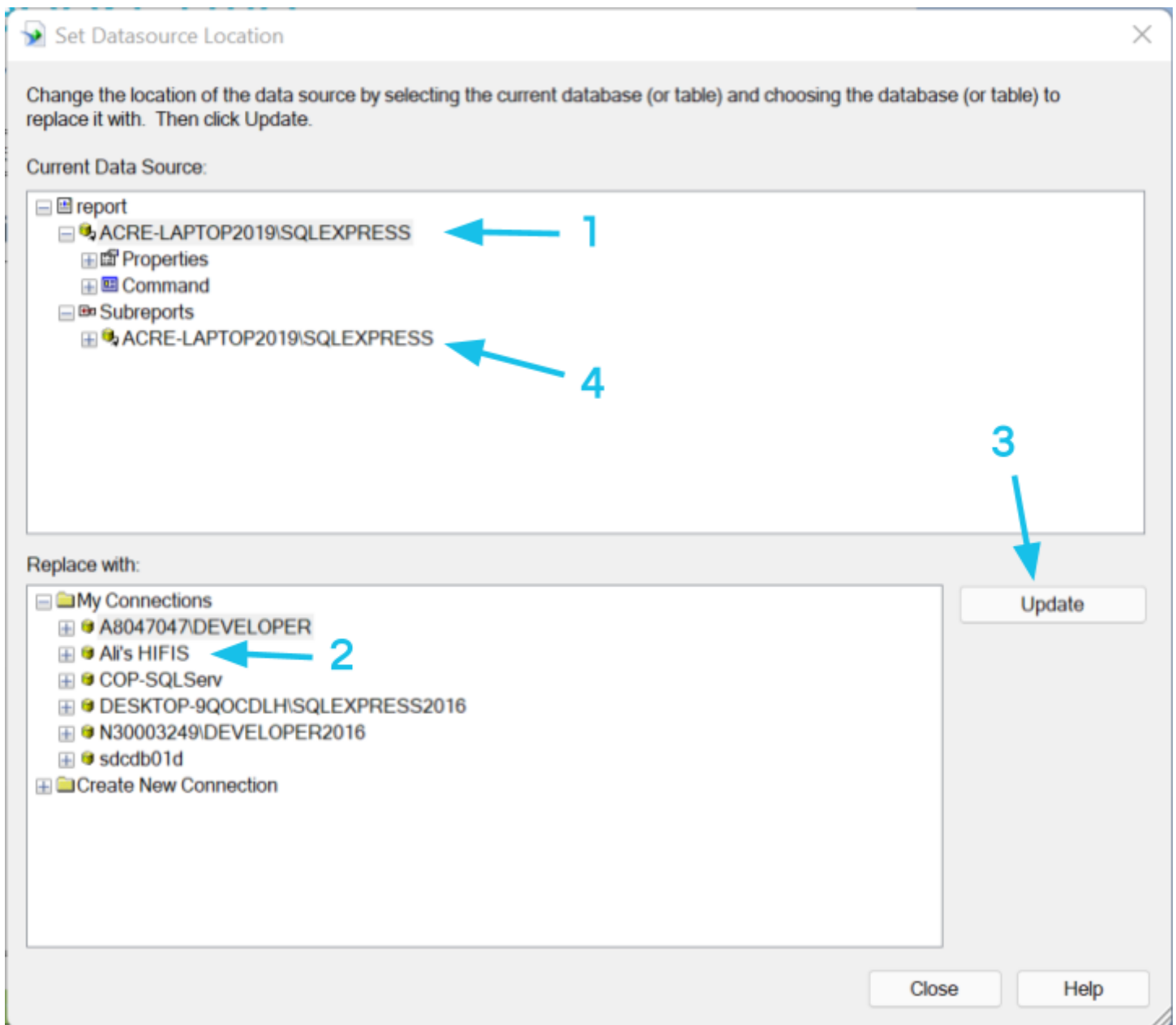
You'll need to change the database that the **template file** is attempting to connect to. For that, you'll need:

- The name of your server
- The name of your database
- A username
- A password for that username

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You can get the above information from your database administrator (DBA), or ask your IT support person.

With the above information, use the Database menu > Set Datasource Location. It will open a window that looks something like this:



1. In the top window, with the heading “Current Data Source:”, click on the name of the current datasource. This should be the first line after “Report,” with an icon to the left that looks like a yellow cylinder (1).
2. Next, click your desired database in the lower window (2), with the heading “Replace with:.” If you’ve already connected to your database, the connection should be listed under “My Connections.”
3. Finally, click the Update button (3) on the right-hand side of the screen.

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Prompt for Parameters (Sometimes)

Depending on how the report is constructed, you may be prompted for the report's parameters at this step. The report is asking for parameters to pre-load the report. It is validating to ensure that the new database is compatible with the report and that the report will be able to successfully run using the new database.

This pre-load step generally takes as long as running the report does, so if the report is pulling in a lot of data, this step could take some time. To make this step go as quickly as possible, choose minimal parameters (i.e. a date range of 1 day, only 1 service provider, etc.). Note that the parameters you choose here do not have an impact on the *output file* you are trying to generate.

Subreports (Sometimes)

Some reports may contain subreports (4), and will be listed separately in the top window under the "Subreports" header. You'll need to repeat steps 1, 2, and 3 for each item listed under Subreports.

Previewing the Report

After you've [Changed the Datasource Location](#), filled in the [Parameters](#) (if necessary), and updated the [Subreports](#) (if necessary), click on the [Close](#) button.

To generate the output for a report, click the [View](#) menu → [Print Preview](#). At this point, you will be prompted for the report's parameters, if any (even if you already added them during [Prompt for Parameters](#) step, above). This may look a little different than you are used to as HIFIS interprets parameters differently than Crystal Reports does.

Notably:

- Some parameters are hidden in HIFIS and automatically contain a value depending on how the user running the report is logged in. However, Crystal Reports doesn't know any HIFIS login data and will prompt you to manually enter values for these parameters. These include:
 - CurrentOrganizationID - should contain the ID number of the Service Provider of the user running the report. A 1 should get you the original Service Provider, usually the HIFIS lead agency.
 - CurrentUserID - should contain the ID number of the user running the report. A 1 should get you the Admin user account.
- Some parameters may look different than in HIFIS:
 - A ServiceProvider parameter will give a list of all Service Providers, not just the ones a user has login rights to
 - A boolean parameter will ask for a true/false value instead of yes/no
- There may be other differences as well. Most reports are intended to be run in HIFIS so you're really getting a behind-the-scenes look here!

Export

To save an *output file*, use the [File](#) menu → [Export](#) → [Export Report](#). There you will be prompted to choose the file format (i.e. .doc, .xls, .pdf), then click OK.