

Using the Report Catalog

The Report Catalog is located on the Report Server.

The following sections describe:

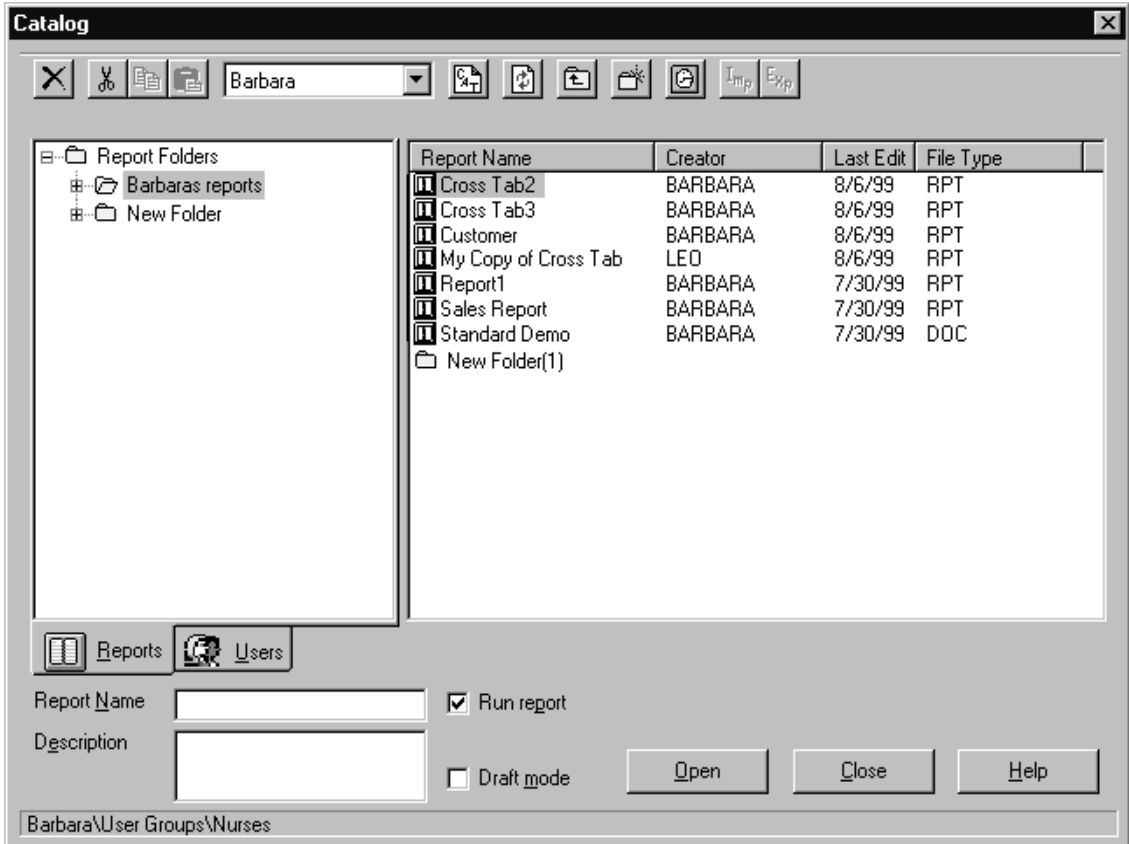
- The purpose of a catalog.
- The relationship of the catalog to your reports.
- The process of creating and opening a report through the catalog.
- The processes of importing, exporting, and saving reports through the catalog.
- The report properties you can access through the catalog.

About the Report Catalog

ReportSmith displays the Report Catalog as a dialog box consisting of a left and right pane. The left pane displays a tree view of folders while the right pane displays the specific contents of each folder selected. There are two basic trees, Reports and Users, that you are able to select by using the labeled tabs located at the bottom left of the pane. Note that the Users tab is visible only to those individuals with administrative privileges.

ReportSmith displays the Report Catalog dialog box as shown in Figure 1.1.

Figure 1.1: Report Catalog dialog box



Users Tab

If you, as an administrator, select the Users tab, ReportSmith displays in the right pane a list of all individuals who have, or have had, privileges within ReportSmith. ReportSmith displays the Users tab as shown in Figure 1.2.

Figure 1.2: Report Catalog dialog box - User tab



Refer to Table 1.1 for tasks you can perform from the Users Tab.

Table 1.1: Users Tab tasks

IF YOU...	YOU CAN...
Right-click on a specific user in the right pane	Add a new user View the Properties of this user

You may inactivate a user by clearing the check mark from the check box to the left of the word 'Active', but you may **never** delete a user from the list. This process allows even an inactive user to be included in all the audit trails of any reports he/she has either created or edited.

Reports Tab

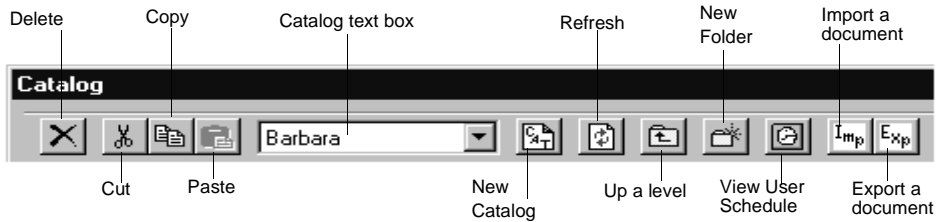
When you, as a user or administrator, select the Reports Tab, ReportSmith displays a tree of folders in the left pane. When you select a specific folder in the left pane, ReportSmith displays in the right pane a list of documents that the folder contains. The list view of documents displays the name of the document, the creator of the document, the date the document was last edited, and the file type. Refer to Table 1.2 for tasks you can perform from the Reports Tab.

Table 1.2: Reports Tab tasks

IF YOU...	YOU CAN...	WHICH ALLOWS YOU TO...
Right-click on Report Folder in the left pane	Create a new folder Import a file Create a new catalog	
Right-click on a specific folder in the left pane	Create a new folder Create a new catalog Import a document into the catalog Cut, delete, or rename a folder	
Right-click on a specific report in the right pane	Select Open, Delete, Cut, or Copy the document Select Schedule Select Properties Select Export	Paste only after you select Copy or Cut Schedule the report Review the general properties, the security level, or the run schedule in the Schedules Summary dialog box for that document Export the document from the catalog

Note: Unless you have administrative privileges, you **cannot** move folders from one location to another, nor can you create a new catalog. Also, you **cannot** delete a folder if it contains documents.

Regardless of which tab you select, you can move reports by dropping and dragging them from one folder to another. Also, by using the icons on the toolbar, you can delete, cut, or copy/paste a selected item; create a new catalog (if you are an administrator); refresh the view of the catalog; move up one level from the current folder location; create a new folder; view the reports you have scheduled to run; and import or export a report. Note, however, that you cannot copy a report if, in its security properties, it is designated as 'Print only'. From the tools bar, you can also select the catalog you want ReportSmith to display.



If this is the first time you are using ReportSmith, when you attempt to open a report, the application displays a message box either to inform you that you do not have access to any catalog or to select a catalog before you begin working. If you do not have access to a catalog, and you do not have administrative privileges to create a new one, see your site administrator to request access to a catalog.

The Catalog features


From the Catalog, you can perform the following tasks:

- Select a catalog
- Create a catalog
- Open a report
- Import a document
- Save a document
- Export a document
- View report properties
- Set report security

Selecting a catalog

Before being able to view folders or reports, it is important that you select a catalog from which to work. If you are an authorized user, your administrator can grant you access to the necessary catalogs. If you have administrative privileges, you can create a new catalog.

- To select a catalog:

1 Click Open Icon  on the toolbar. ReportSmith displays the Catalog dialog box.

— or —

- 1 Click File from the menu bar of ReportSmith. ReportSmith displays a drop-down menu.
- 2 Click Open from the drop-down menu. ReportSmith displays the Catalog dialog box.

- Click the Down Arrow to the right of the Catalog dialog box on the tool bar. ReportSmith displays a drop-down list of catalogs to which you have been granted access.



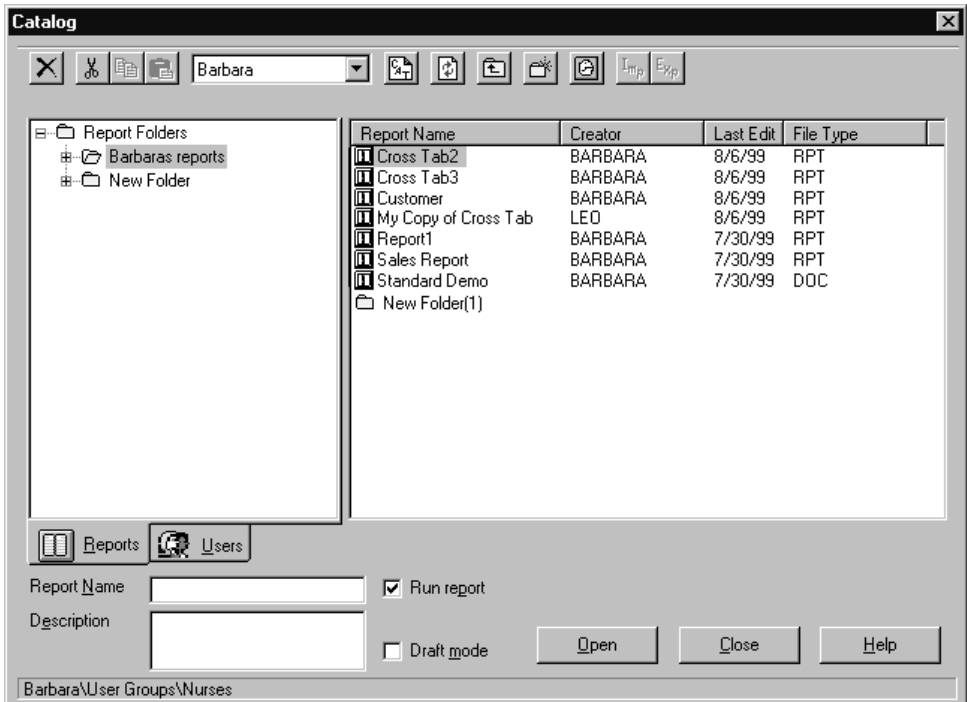
- Select the Catalog you want to work with from the drop-down list. ReportSmith displays the catalog name in the Catalog dialog box and displays the report folders in the left-hand pane of the dialog box.


Creating a new catalog

As a user of ReportSmith having administrative privileges, you may sometimes find it necessary to create a new catalog.

- To create a new catalog,
 - Click File from the menu bar of ReportSmith. ReportSmith displays a drop-down menu.
 - Click Open from the drop-down menu. ReportSmith displays the Catalog dialog box as shown in Figure 1.3.

Figure 1.3: Catalog dialog box.



3 Click New Catalog Icon  on the toolbar of the Catalog dialog box.

— or —

- 1 Right-Click any folder in the right pane of the Catalog dialog box. ReportSmith displays a pop-up menu.
- 2 Click New Catalog. ReportSmith displays a Create New Catalog text box.

4 Type NAME of the new catalog in the text box

Note: ReportSmith does not accept the following characters when naming a catalog:

\\ : * ? < > | ' .


5 Click OK. ReportSmith displays the name of the new catalog in the Catalog drop-down list on the toolbar.

Opening a report

Each time you open an existing report in ReportSmith, you do so through the Report Catalog. The Report Catalog, located on the Report Server, provides the opportunity for all authorized users to access reports stored in the catalog.

Note: If you are using ReportSmith for the first time, you may not have access to any catalogs. Please see your site administrator to obtain access to the necessary catalogs before attempting to open a report in ReportSmith.

■ To open a report in ReportSmith,

1 Click Open Icon  on the toolbar. ReportSmith displays the Catalog dialog box.

— or —

- 1 Click File from the menu bar of ReportSmith. ReportSmith displays a drop-down menu
- 2 Click Open from the drop-down menu. ReportSmith displays the Catalog dialog box.


2 Double-click the document in the right pane that you want to open. ReportSmith displays the name of the document in the Report Name text box, closes the Catalog dialog box, and opens the report.

— or —


- 1 Right-click the document in the right pane that you want to open. ReportSmith displays a pop-up menu.
- 2 Click Open from the pop-up menu. ReportSmith closes the Catalog dialog box and opens the report.

Importing documents

You can import documents from another location using the Report Catalog. Once imported, these documents are stored in the Report Catalog on the Report Server and are available to all ReportSmith users who have administrative privileges or have been granted access to the report.

- To import a report to the catalog,
 - 1 Click File from the menu bar of ReportSmith. ReportSmith displays a drop-down menu.
 - 2 Click Open from the drop-down menu. ReportSmith displays the Catalog dialog box.
 - 3 Click Import Icon  from the tools bar of the Catalog dialog box. ReportSmith displays the Import File dialog box.

— or —

 - 1 Right-click the report folder in the left-hand pane. ReportSmith displays a pop-up menu.
 - 2 Click Import from the pop-up menu. ReportSmith displays the Import File dialog box.
 - 4 Navigate to the document(s) you want to import. (Be sure to select the document(s).) ReportSmith highlights the document(s) and displays the filename(a) in the File Name text box.
 - 5 Click Open. ReportSmith displays an Import to Folder dialog box.
 - Select the folder in which you want to import the document(s).
 - If you are changing the name of the document, click the Change Name button and enter the new name in the New Name box.
 - If you are adding a description of the document, click Change Description and enter the new description of the document in the New Description text box.
 - Click OK. ReportSmith closes the Import to Folder dialog box.
 - 6 Click the Refresh Icon  on the tool bar of the Catalog dialog box. ReportSmith displays the document you imported in the list view of the documents in the right-hand pane of the Catalog dialog box.

Saving a Report

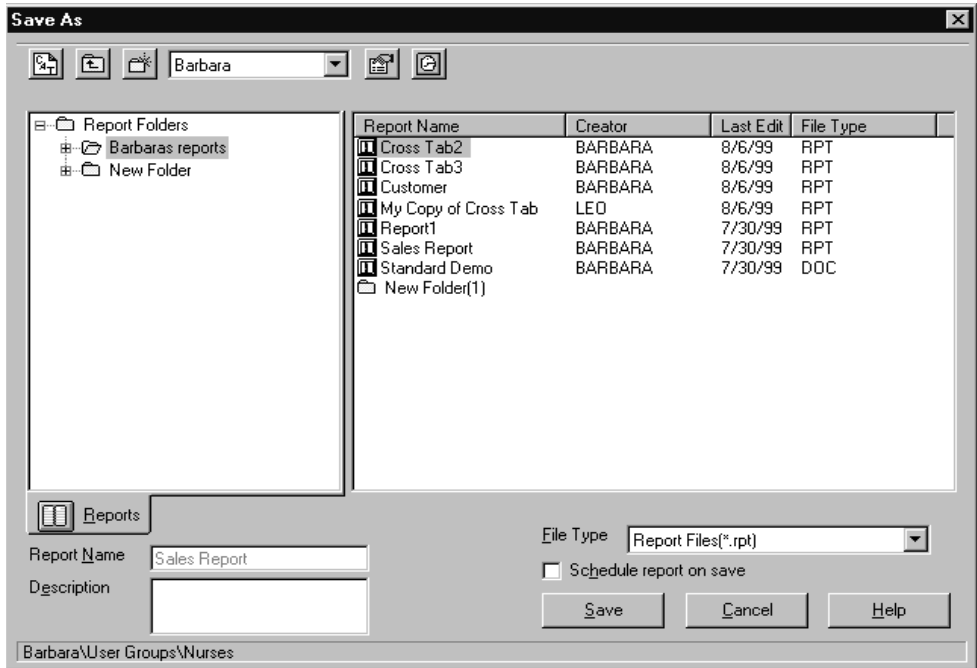
When you create a report, you save it to the catalog. This provides a central location in which to store all reports, providing the opportunity for all authorized users to access all records.

Note: You must save your report in a folder inside the Reports Folder, not the Reports Folder itself.

- To save a report—with a report open,

- 1 Click File on the menu bar. ReportSmith displays a drop-down menu.
- 2 Click Save As on the drop-down menu. ReportSmith displays a Save As dialog box which resembles the Catalog dialog box as shown in Figure 1.4.


Figure 1.4: Save As dialog box



- Note:** If you select Save on the drop-down menu, ReportSmith displays the Save As dialog box if this is the first time you attempt to save the report.
- Navigate to the folder in the catalog to which you want to save the report.
 - Type the name of the report in the Report Name text box.
 - Type the description of the report in the Description text box.
 - Click the down arrow to the right of the File Type text box. ReportSmith displays a drop-down list of file types available.
 - Select the file type from the list that you want to use to save the report . ReportSmith displays the file type in the File Type dialog text box.
 - Click check box to the left of 'Schedule Report on Save' if you want to schedule your report to run at a particular interval. ReportSmith displays a check mark in the check box.
- 3 Click Save. If you checked the 'Schedule Report on Save' check box, ReportSmith displays the Scheduler dialog box labeled with the name of your report and you may now schedule your report.
 - 4 Click OK. ReportSmith closes the Scheduler dialog box, the Save As dialog box, and saves your report in your report folder in the Catalog on the Report Server.

Exporting documents

You can export a document and save it in another location. Without a specific extension attached, ReportSmith saves the document to the new location as a report file with an .rpt default extension.

- To export a report from the Catalog,
 - 1 Click File from the menu bar of ReportSmith. ReportSmith displays a drop-down menu.
 - 2 Click Open from the drop-down menu. ReportSmith displays the Catalog dialog box.
 - 3 Click Export Icon  from the tools bar of the Catalog dialog box. ReportSmith displays the Export File dialog box.
 - or —
 - 1 Right-click a specific report folder in the right pane. ReportSmith displays a pop-up menu.
 - 2 Click Export from the pop-up menu. ReportSmith displays the Export File dialog box.
 - 4 Navigate to the location to which you want to export the document.
 - Type the name of document and file type in File Name text box.
 - Click down arrow to select file type. ReportSmith displays file type information you selected in the text boxes.
 - Click Save button in the Export File dialog box. ReportSmith saves the document in the location you select and closes the Export dialog box.
 - 5 Click the Close button in the Catalog dialog box. ReportSmith closes the Catalog dialog box and returns you to the application window.

Report properties

You can view the properties of a report (or any document listed in the catalog) from the Reports dialog box inside the Catalog. Selecting Report properties displays three tabs: General, Security, and Schedule.

General tab

The General properties tab displays the following information: report name, description, who created the report and the date, who last modified the report and the date, and the report type. ReportSmith displays the General Properties tab as shown in Figure 1.5.

Figure 1.5: General Properties tab



Security tab

The Security tab displays the following choices: 'Private', 'Print only', and 'Read Only'. When a document is marked **'Private'**, the following is true:

- Only the creator of the document or a user with administrative privileges can edit or delete it.
- A user without administrative privileges can only see those documents he/she creates.
- Private is the default setting.

When you clear the dot from the check box to the left of 'Private', ReportSmith enables the other two radio choices: 'Print only' and 'Read only'. When you attempt to open a report with the property of **'Print only'**, ReportSmith very quickly does the following:

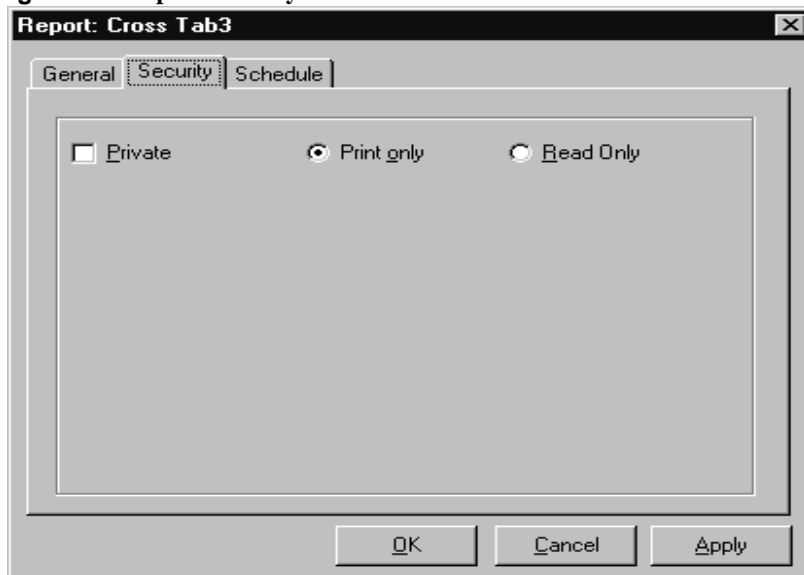
- Allows you to open the report.
- Sends it to the default printer.
- Immediately closes the report.

If you select **'Read only'**, the following is true:

- You can open and view the document, but you cannot move, cut, paste or edit it.
- The original document always remains in the original folder.
- You can save a 'Read only' document under a different filename. This new document now becomes your document. ReportSmith lists you as the creator and allows you to cut, paste, copy, edit and move the document.

ReportSmith displays the Report Security Screen as shown in Figure 1.6.

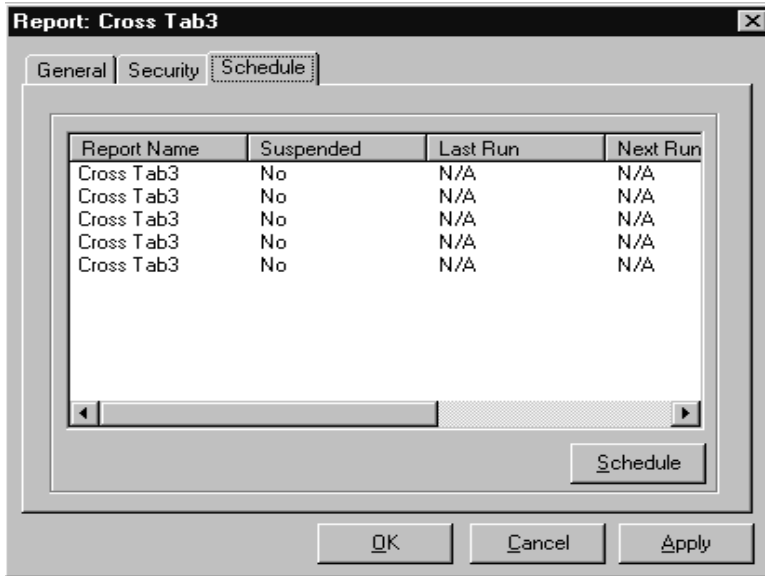
Figure 1.6: Report Security Screen



Schedule tab

The Schedule tab displays the Schedules Summary list box. This list box enables you to review, edit, or delete any schedules for the selected report. ReportSmith displays the Report Schedules Summary list box as it appears in Figure 1.7.

Figure 1.7: Schedule Summary List Box.


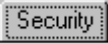


- To view report properties,
From the Catalog dialog box,

- 1 Click Report Tab  at the bottom of the left pane in the Catalog window. ReportSmith displays a tree of Report Folders in the left-hand pane.
- 2 Click a specific folder in the left-hand pane. ReportSmith displays, in the right-hand pane, all the documents the folder contains.
- 3 Right-click a specific document in the right-hand pane of the catalog window. ReportSmith displays a pop-up menu.



- 4 Click Properties from the pop-up menu. ReportSmith displays a multi-tabbed dialog box labeled Report:[filename].

- Click General tab  from the Report Properties dialog box. ReportSmith displays the following report properties:
 - Report Name
 - Description (of report)
 - Created
 - Created by
 - Modified
 - Modified by
 - Report Type (file type)
- Click Security tab  from the Report Properties dialog box. ReportSmith displays the following choices:
 - Private
 - Print only
 - Read Only

Note: ReportSmith checks 'Private' as the default setting. If you clear the check box in front of 'Private', ReportSmith enables the two radio choices: 'Print Only' or 'Read only'.

- Click the Schedule tab  from the Report Properties dialog box. ReportSmith displays the Schedules Summary list box.

Note: From the Schedule tab, you can also edit the Report Schedule.

Click the Schedule button in the lower right-hand corner of the Schedules Summary list box. ReportSmith displays the Report Scheduler dialog box.

For complete details on scheduling a report, please see Chapter 7: "Scheduling Reports" on page 167.

Figure 1.8: Report Scheduler dialog box

test2

Once
 Daily
 Weekly
 Monthly

Start Schedule
Start Date: 8 / 1 / 99 Start Time: 21:30:00

End Schedule
 No end date End date 6 / 30 / 99

Repeat
Every: 1 Hours
Until time: 0:00:00

Printer
\\COOPER\Hewlett Packard LaserJet 6L on Suspended Connection Info

OK Cancel Help

- 5 Make necessary changes to the report schedule.
- 6 Click Apply if you make any changes. ReportSmith records your changes.
- 7 Click OK. ReportSmith closes the Report Properties dialog box and returns you to the application window.