

Customizing ReportSmith

Besides customizing the report styles you use in creating your reports, you can customize the ReportSmith environment to suit your needs, too. You can specify whether to load data locally to memory or to disk, keep the data on a server, or let ReportSmith determine the best method for your report. Additionally, you can specify measurement-unit options, tell ReportSmith where to find data source connections, and more. This chapter shows you how to set ReportSmith options, including importation of data from other applications and exportation of report objects to other applications.

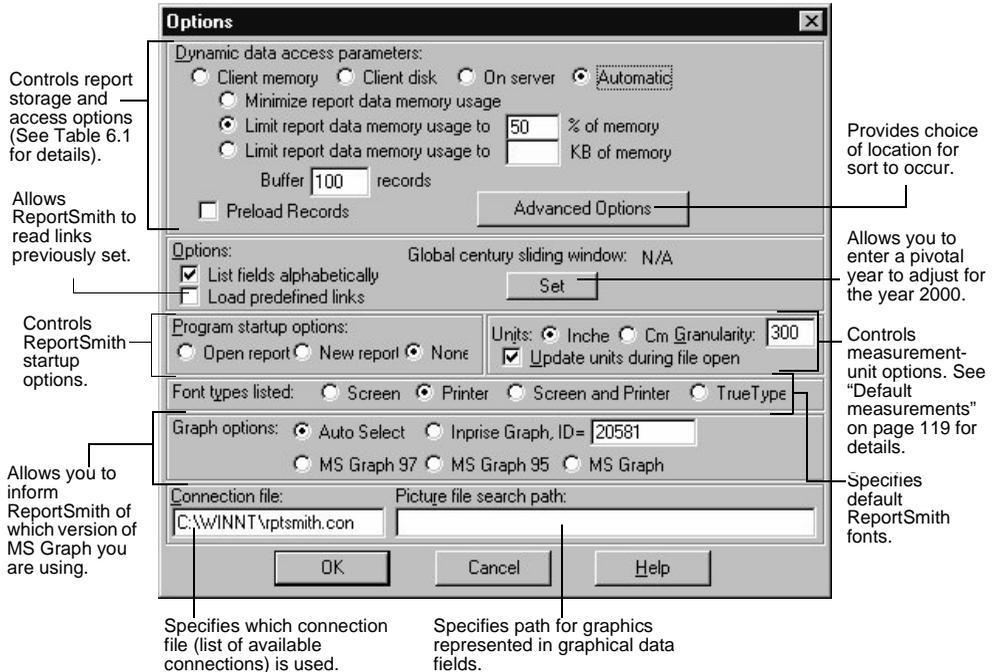
Setting application options

Earlier chapters have shown you how to customize various report elements and how to use and modify report styles to create a custom look and feel for individual reports. You can also choose to customize ReportSmith's application options—those aspects of ReportSmith that affect how you create every report.

- To customize global ReportSmith options:

- 1 Choose Tools|Options to open the Options dialog box, as shown in Figure 6.1.

Figure 6.1: The Options dialog box



2 Specify the settings you want for each option, as shown in Table 6.1.

Table 6.1: Option groups of the Options dialog box

Option group	Purpose
Dynamic Data Access Parameters	<p>Controls access and storage of report data. ReportSmith uses Dynamic Data Access (DDA) to estimate the amount of data and to determine the most efficient strategy for transferring it into a report and storing it for later use.</p> <ul style="list-style-type: none"> Advanced Option Button allows you to sort material from your PC rather than from the server. Select the connection type in use on your PC. Click “Insert to avoid server sort list” button, and then click OK.
Options	<p>List Fields Alphabetically When checked, lists all fields in new tables in alphabetical order in the report. Does not affect currently active reports and their constituent tables, only tables added after checking this option. Columns can still be manually rearranged.</p> <p>Load Predefined Links Allows ReportSmith to read links which are set beforehand to identify common fields. Using pre-defined links eliminates the need to set links manually and avoids confusion. If you are not familiar with the tables and fields in the databases, please contact your Database Administrator. For more information about pre-defined links, refer to the Readme notes or to Online Help, ‘Predefined Links’.</p> <p>Global Century Sliding Window Allows you to enter a pivotal year to adjust for the year 2000. For example, if you enter 50, this becomes the pivotal year. Dates in your report greater than 50 are read as belonging to the twentieth century, and 19 is inserted for the century. Dates in your report less than 50 are read as belonging to the twenty-first century, and 20 is inserted for the century. When Global Century Sliding Window is set from the Tools Option dialog box, the pivotal year is set for all reports in the database. To set the pivotal year only for specific reports, see Figure 2.11 on page 40 under “Using the Table Columns dialog box” for the Century Selector.</p>
Program Startup Options	<p>Note: Before using the Century Selector, it is very important to know how the underlying fields are stored in your database. If they are stored as MM/DD/CCYY, then you do not require the Century Selector. If they are stored as MM/DD/YY, then the Century Selector may be of use to you.</p> <p>Specifies whether upon startup ReportSmith prompts you to create a new report, open an existing report, or provide only the application with no report at all.</p>
Units	<p>Specifies default measurement units and the granularity ReportSmith uses when placing report objects.</p>

Table 6.1: Option groups of the Options dialog box (continued)

Option group	Purpose
Font Types Listed	Specifies default ReportSmith font types: <ul style="list-style-type: none"> • Screen: optimizes screen display by using fonts designed for screen. • Print: optimizes printed appearance by using fonts designed for print. • Screen and Print: uses both screen and printer fonts for optimal appearance in both formats. These fonts may differ slightly, so you may see a slight discrepancy between onscreen display and the printed report. • TrueType: TrueType uses the same font for both screen and printer. Printing is slower than with printer-specific fonts, but there is no discrepancy between screen and printer.
Graph Options	Specifies which version of MS Graph you are using.
Connection File	Sets the directory (by default your Windows directory) and filename where ReportSmith stores your named connections.
Picture File Search Path	Points to the location(s) where ReportSmith can find graphic images corresponding to file names in reports. ReportSmith searches this path for any graphic files you have in your database; if referenced graphics contain full path names within each table, you can leave this option blank. Separate multiple directories with commas, semicolons, or spaces.

Controlling data access and storage

You can set parameters within the Options dialog box to control the parameters of data access and storage, as well as memory usage for report data. The first option you want to set involves Dynamic Data Access, ReportSmith's means of obtaining the data for your reports.

Setting Dynamic Data Access parameters

The options you select in Dynamic Data Access parameters control which resources ReportSmith uses to store and move data. Select from the parameters shown in Table 6.2.

Table 6.2: Dynamic Data Access options

Option	Description
Client Memory	Select this option if you always want data loaded into client (your computer's) memory.
Client Disk	Select this option if you always want data loaded onto your computer's hard disk. Specify the data path for the disk in the RPTSMITH.INI file.
On server	Select this option to have ReportSmith leave all the records on the server (the remote computer supplying the data source) <i>except</i> the number of records specified in the Buffer option.

Table 6.2: Dynamic Data Access options (continued)

Option	Description
Automatic	<p>Select this option (the default) to have ReportSmith evaluate where to place the data. When you select this option, the following additional options become available:</p> <ul style="list-style-type: none"> • Minimize Report Data Memory Usage evaluates available disk space and keeps the data on the server if there isn't enough room on your computer's hard disk. • Limit Report Data Usage to ___% of Memory limits memory usage to a specific percentage (50% by default) of available memory. ReportSmith estimates the memory requirements for data storage, and if the data requires more than the specified percentage of available memory, ReportSmith then looks at available disk space. If the disk space is also insufficient, data remains on the server. You can enter the exact percentage you want to use. • Limit Report Data Memory Usage to ___KB of memory estimates memory requirements for data storage using the number of kilobytes (KB) you enter for this option, instead of a percentage limit. Enter the number of KB in the text box for this option. • Buffer ___ Records specifies how many records should be stored locally (on your computer) when ReportSmith access data sources on a server (remote computer).
Preload Records	Check this option to have ReportSmith load buffered records before accessing the rest of a data source.

Selecting measurements

Use the Units option to set the default measurement system to inches or centimeters.

Option	Description
Inches	Select this option to have ReportSmith rulers displayed in inches. This is the default setting.
Cm	Select this option to have ReportSmith rulers displayed in centimeters.
Granularity	The Granularity setting determines the resolution for placing objects in a report. Higher granularity gives a finer resolution on the placement of objects in the report, but limits the maximum size of the page and workspace in the report. ReportSmith strongly recommends using a granularity of at least 300 for inches and 118 for centimeters, and using a lower granularity only if you need to display extremely wide or tall pages.
Update Units During File Open	If your report was created with different units options than specified in the Options dialog box, choose this option to have ReportSmith convert your report to use the options you specify. (See Granularity, above, for further information.)

Selecting font types

The options you select in the Font Types option group specify which list(s) of fonts you can choose from when using ReportSmith. Whenever you need to select a font in ReportSmith, the list of available fonts is controlled by this option. Select from the parameters described below.

Option	Description
Screen	Select this option to use screen fonts (whether or not they have equivalents for the printer) each time you use ReportSmith. When you choose this option, ReportSmith includes TrueType fonts.
Printer	Select this option to use only fonts that are installed on your printer each time you use ReportSmith.
Screen and Printer	Select this option to use both screen and printer fonts each time you use ReportSmith. When you choose this option, ReportSmith includes TrueType fonts.
True Type	Select this option to use TrueType fonts (scalable fonts that you can change and that appear exactly as they'll print) each time you use ReportSmith. Note that while ReportSmith will use TrueType fonts if you select "Screen" or "Screen and Printer", the reverse is not true. That is, if you select TrueType, ReportSmith will use only TrueType fonts without listing any other type of screen or printer font.

Using the Connection file

The Connection File option stores the named connections you create through File|Connections. This option sets the location and name of your connection file.

The default Connection file name is RPTSMITH.CON. ReportSmith stores this file in your Windows directory. If your Windows working directory is on a local area network (LAN), give the connection file for each workstation a unique file name, with a three-character .CON file extension. To change this option, place the text cursor in the text box to enter the drive, directory, and file name for the connection file.

Pointing to graphics files

The Picture File Search Path option sets the locations (directories) that you want ReportSmith to search for graphics files used in conjunction with the Display As Picture option.

Enter the drive and directory path of the graphics represented by file names in your reports. Separate multiple directory listings with commas, semicolons, or spaces. ReportSmith then saves time by searching for report-referenced graphics only in the directories you specify here.

Setting variable options

Previous chapters have shown you how to set such report-specific options as the tables used to create the report, the page setup, the report type and style, and formatting of the various report elements.

You can also create highly focused and targeted options such as enabling or disabling certain menus or toolbar buttons, or complex and sophisticated report variables and derived fields. These options can then be applied to a specific report or globally at your discretion.

For variable options, use the ReportBasic macro language to create a macro designed to do exactly what you want. Macros are discussed later in this book, together with a complete ReportBasic command reference. Specific techniques for customizing the ReportSmith toolbar and menu bar can be found in Appendix B, “Enabling and disabling ReportSmith features” on page 429.

