Introduction

ReportSmith® is a powerful visual database reporting and query tool used to provide a streamlined approach to creating reports using database files and tables. Using ReportSmith, you can:

- Create reports from databases without knowing complex database commands.

- Edit and format reports, combining items such as data, text, charts, pictures, and sound bites.

- Use "live data" to see the result of your changes immediately.

ReportSmith documentation

ReportSmith includes complete documentation to help you learn to use the product quickly and effectively.

The ReportSmith documentation consists of three parts:

- *Creating Reports* (this manual)
- Online Help

Documentation overview

The ReportSmith documentation includes a printed documentation set (described in this section), an extensive online Help system, and the latest release notes.

- This manual provides an overview of ReportSmith, along with its interface and its capabilities, and a reference guide to ReportSmith macros.

  Creating Reports assumes a general knowledge of the Windows environment. Advanced topics, such as the ReportBasic macro language, assumes a database and programming background.

- Online Help provides you with both reference and task information with definitions, topics, instructions, and the latest macro information. Online Help is also available during installation.

Using this manual

Creating reports can be broadly viewed as a four-step process:

1 Establish connections to data sources.

2 In ReportSmith, point to your data source and import the data you want.

3 "Polish" your report, formatting it for maximum onscreen and in-print impact.

4 Automate and customize your work by creating macros and dynamically sharing data.

This manual is organized around the four-step process listed above, and includes a macro reference to assist you in automating your work. Details of each book section are listed below.

- **Part I, 'Understanding reports,'** provides an explanation of how to use the catalog, what its relationship is to reports, what reports are, and how they are generated from data.
- **Part II, 'Refining your reports,'** explains how to format your report for maximum impact, including how to format a report for printing, how to work with styles, and how to graph report data.
- **Part III, 'Managing reports,'** shows you how to customize your reports to fit the way you work, schedule your reports on a once, daily, weekly, or monthly schedule, and simplify and speed up report generation by creating macros.
- **Part IV, 'Macro guide,'** provides an overview of macro concepts as implemented in ReportSmith, as well as a sampling of macros from an elementary to an advanced level. Finally, this part explains some ReportBasic programming conventions and also provides an alphabetical reference of ReportBasic macro commands.

Using Help

ReportSmith's online Help provides a superset of the information presented in the printed manuals. Use online Help to find:

- Specific procedural information regarding report generation tasks in ReportSmith.
- Reference material for the ReportSmith macro library.

Documentation conventions

The printed documentation for ReportSmith uses the typefaces and symbols described in Table Intro. 1 to indicate special text.

Table Intro. 1: Typefaces and symbols in this manual

Typeface or symbol	Meaning
Monospace type	Monospaced text represents text as it appears onscreen or in ReportBasic code. It also represents anything you must type.
[ ]	Square brackets in text or syntax listings enclose optional items. Text of this sort should not be typed verbatim.
Italics	Italics are used to emphasize certain words, such as new terms.
Keycaps	This typeface indicates a key on your keyboard. For example, "Press *ESC* to exit a menu."
■	This symbol indicates the beginning of a procedure. The text that follows describes a set of general steps for performing a specified kind of task.
▶	This symbol indicates a step or procedure in an example.
Note, Tip, Caution	"Note" or Tip" in the left column indicates a helpful piece of information to make using ReportSmith faster and easier. "Caution" alerts you to actions that could produce unexpected or undesired results.

Starting ReportSmith

You can start ReportSmith in two ways:

1 Start | Programs | ReportSmith | ReportSmith.

— or —

Double-click the ReportSmith icon on your desktop.
ReportSmith displays the log-on screen.

2 Type your name in the name text box. If this is the first time you are using ReportSmith, the default user name is "Administrator".

3 Type your password in the password text box. If this is the first time you are using ReportSmith 4.2, the default password is "admin". The password is case sensitive, so be sure to use all lower case letters.

A system administrator should be the first to use ReportSmith, register the users on the system, and change the default Administrator password to prevent unauthorized access to the catalog and reports.

4 Click OK. ReportSmith displays the application window.

Contacting Strategic Reporting Systems

Strategic Reporting Systems offers a range of technical support plans to fit the different needs of individuals, consultants, large corporations, and developers. For details on these and other Strategic Reporting services, see the installation sheet included with this product or contact us.

Via Internet   www.srs-inc.com

At this location, you can place orders for upgrades, send questions to our support team, and find some written canned reports you may download for personal use.

Via phone   (978) 531-0905

We are available from 8:00 am to 6:00 p.m., Eastern Standard Time, Monday through Friday.

Via fax   (978) 531-1007

Via e-mail   Technical Support: support@srs-inc.com
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Training   Contact: ClientSvcsMgr@srs-inc.com

Strategic Reporting Systems provides three training courses to use ReportSmith: Basic, Intermediate and Advanced. These courses may be held on-site to work with your actual data. These courses are also available at our Boston, Massachusetts area facility.