This document is provided to give you an idea what R-Tag Documentation and Search can do and how you can use it. If you decide that you need more information or you prefer to see a demo of the software please do not hesitate to contact us.

You can also check the videos at the bottom of this page: http://r-tag.com/Pages/CrystalSearch.aspx

Contents

Getting started with R-Tag Documentation and Search

Installation and initial configuration

Unzip R-Tag installation zip file in a folder and run setup.exe. It will install R-Tag and all required components.

Installation will create 2 icons on the Desktop and 2 shortcuts in the User's Programs Menu.
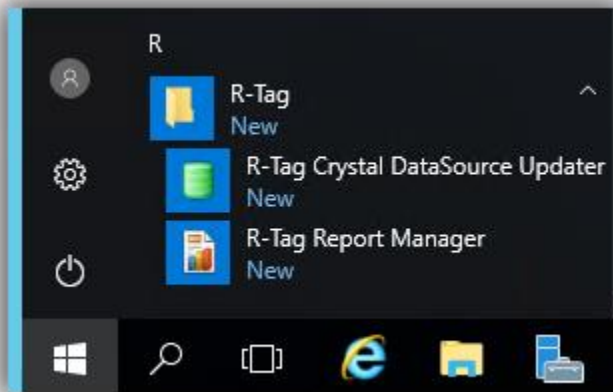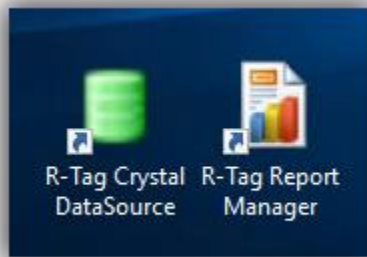
R-Tag Documentation and Search is part of R-Tag Report Manager. To start R-Tag Documentation and Search please

use the icon for R-Tag Report Manager

First thing you need to do is to switch to SQL Server database. By default, R-Tag installation installs and configures a Local database. This database is good for testing R-Tag Viewer and Scheduler. To have access to advanced features like Documentation and Search you need to use SQL Server database. Instructions how to install and configure SQL Server database are available in this document: Installing SQL Server database for R-Tag

Once SQL Server database is configured request a temporary license key. You will be able to test the software without this key, but there will be limitations. Instructions how to request temporary license key are available in this document: Request temporary license key

Import folder of reports

Select the folder where you want to import the reports and click toolbar button "Add Reports from Folder …"
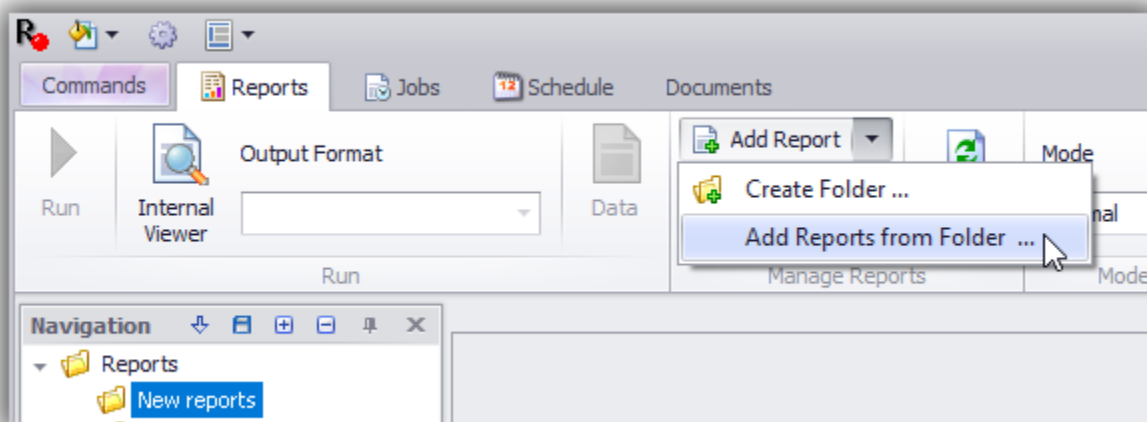

Report Folder Wizard will guide you through the process of import reports.
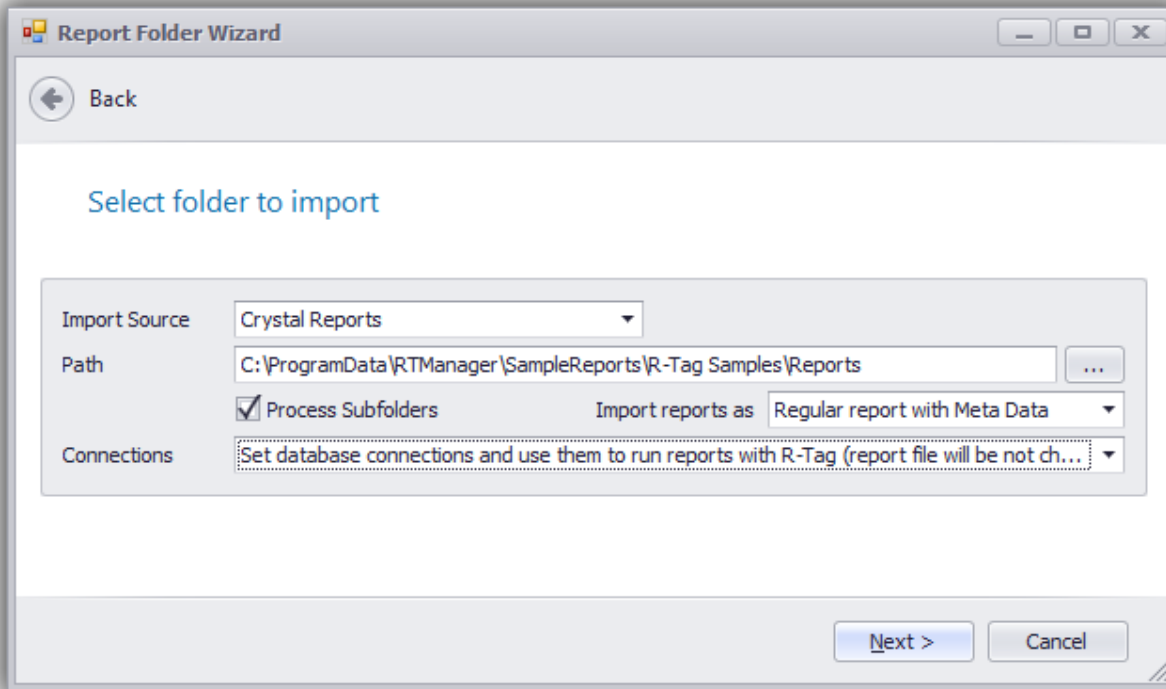
- Initial settings
  Set the path to the folder with the reports and select value to import reports as "Regular Report with metadata". For connections, we recommend to use the option "Set database connections and use them to run reports using R-Tag (report will be not changed)". This will allow R-Tag to retrieve reports' real SQL and to run reports. If this option is selected R-Tag will analyze the reports and will show the list of used connections. For each connection in the list you can provide a connection, which R-Tag will use to retrieve the reports' SQL and when running the report. Click "Next"
- Select report to process
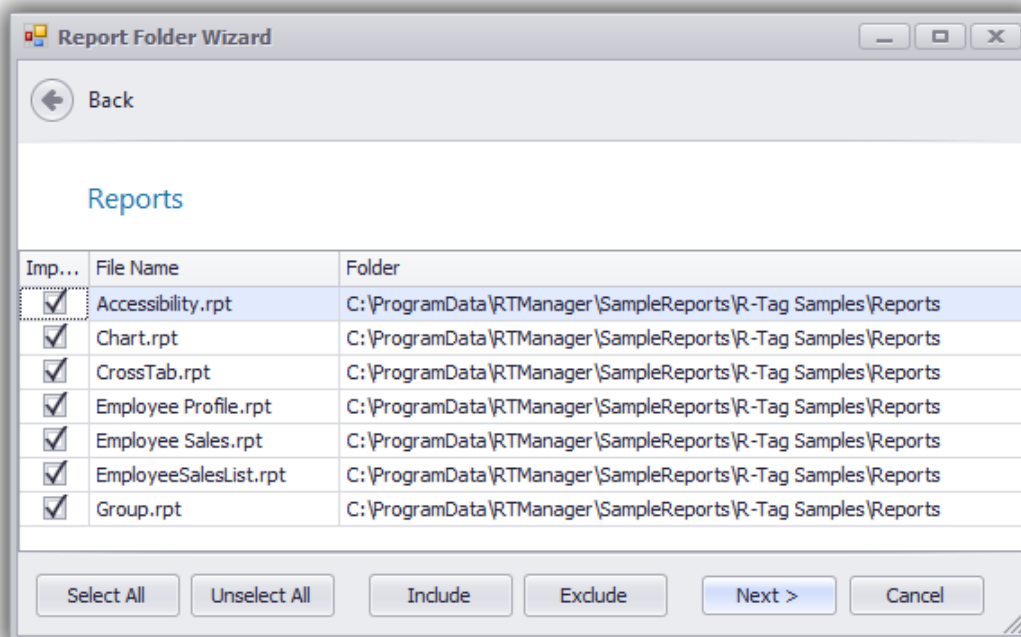
R-Tag will retrieve all files from the path set in the previous screen and will show them so you can choose, the files you want to process. In addition of using "Select All"/" Unselect All", you can select multiple records and use buttons" Include"/" Exclude" to check/uncheck files. You can also use filter to find quickly certain files. Right click on any column caption and use the 3 options at the bottom
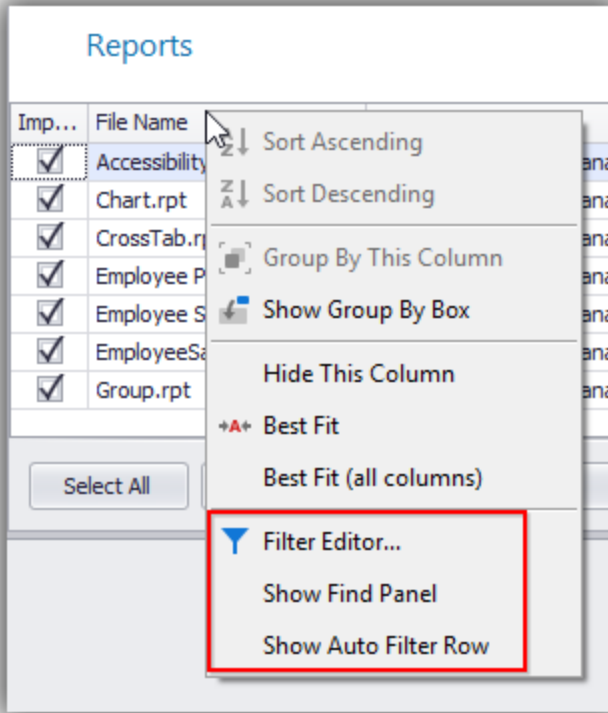
"Show Find Panel" will be the fastest way to find matching records and it works on all columns. "Show Auto Filter Row" will be a better choice if you would like to filter data on a specific column. Filter editor is for more complicate searches, when you want to define criteria with multiple "AND" and "OR" clauses. Once all reports you want to process are checked you can click "Next". If on the Initial settings screen you selected connections option "Set database connections and use them to run reports using R-Tag (report will be not changed)", R-Tag will start examining the checked reports for connection information. There will be a splash screen showing the progress
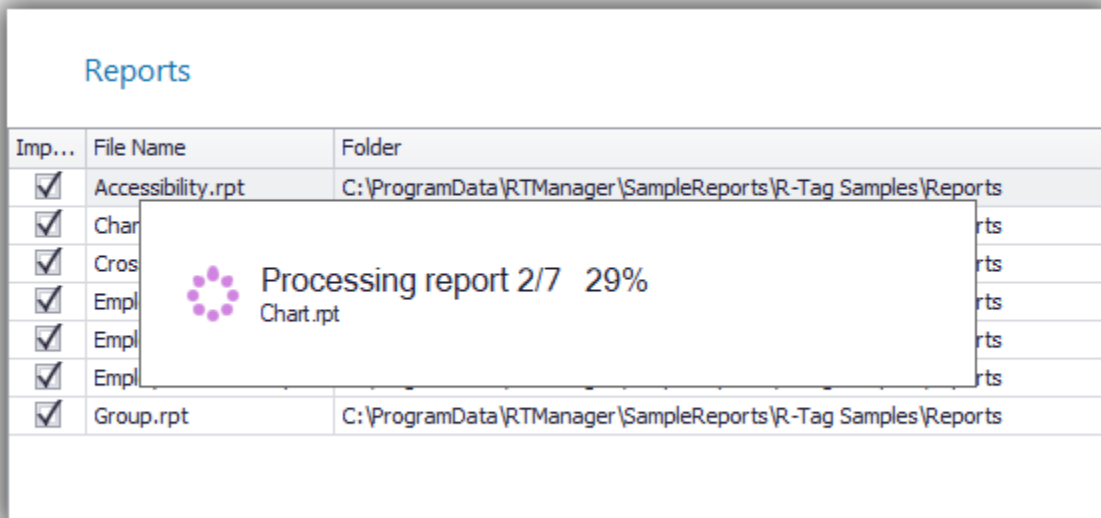

Once the reports in the list are processed R-Tag will show a list of connections
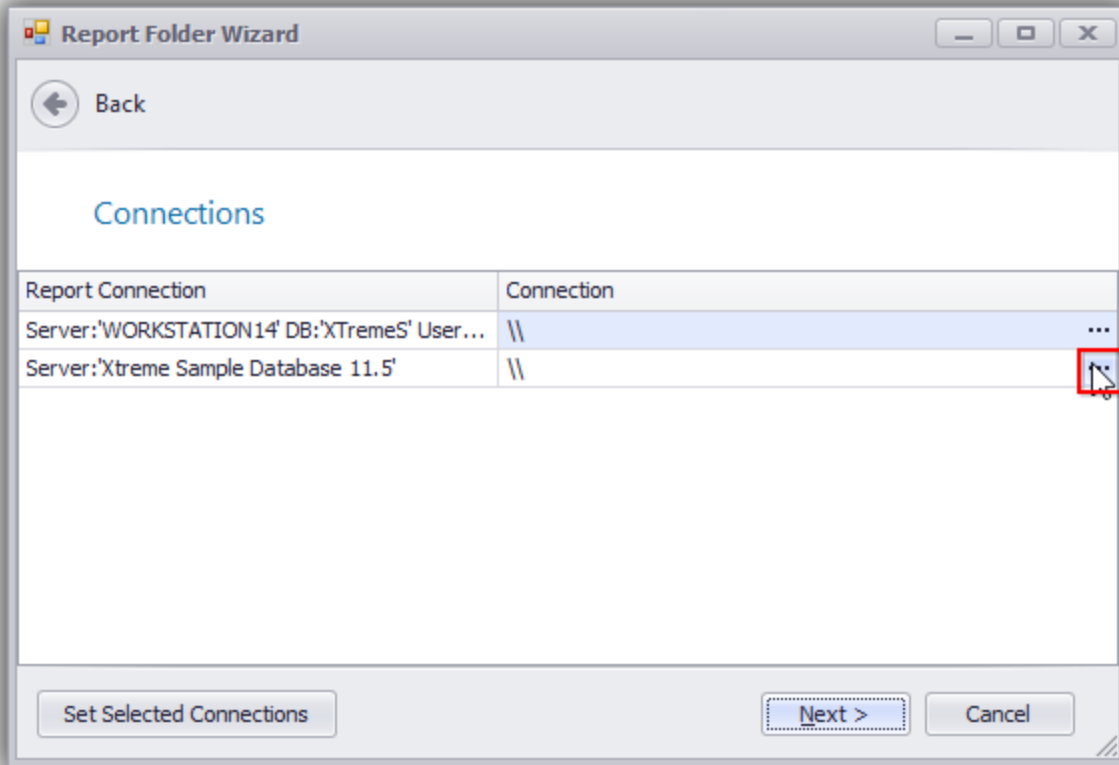
You can click on the 3-dot button for each connection and set the one R-Tag has to use when running the report or retrieving the SQL. Often, different records will point to the same connection, but will have small differences in capital, lower case, different user name etc. You can set these connections with one click by selecting multiple rows (press Control or Shift and select multiple rows with the mouse) and use the button in the bottom left corner "Set Selected Connections"

At the end all reports' connections will have assigned connections
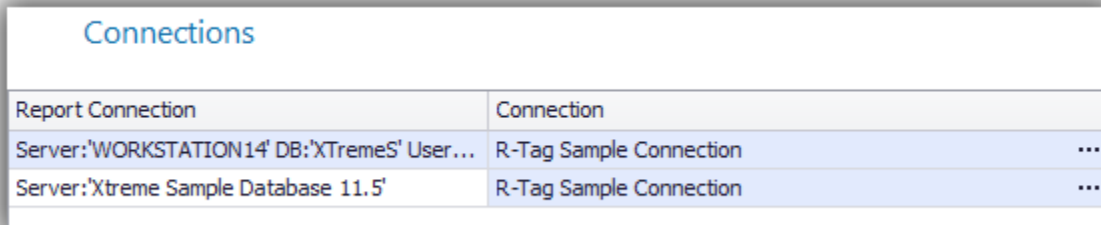
Click "Next" and R-Tag will retrieve the list of tables used in the report and allow you to change the names. This might be useful if database structure was changed and table Database.dbo.Table1 was renamed to Database1.Schema1.Table1. Most of the times you will just click next and use the same table names. Click "Next" to continue
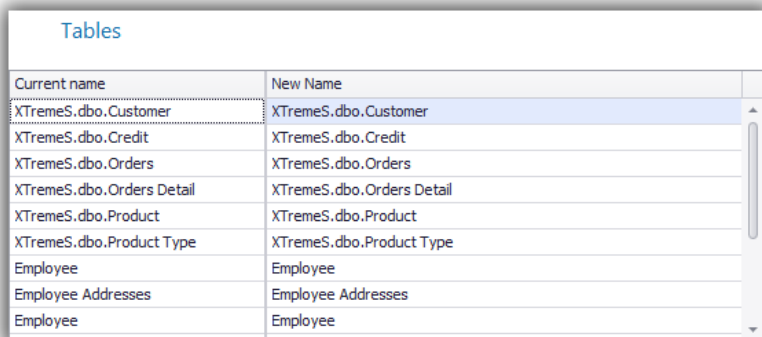
R-Tag will start applying connection and collect report information. A splash screen showing progress will be shown again. This process will take more time than the first one, since R-Tag will apply the new connections and will retrieve more data.
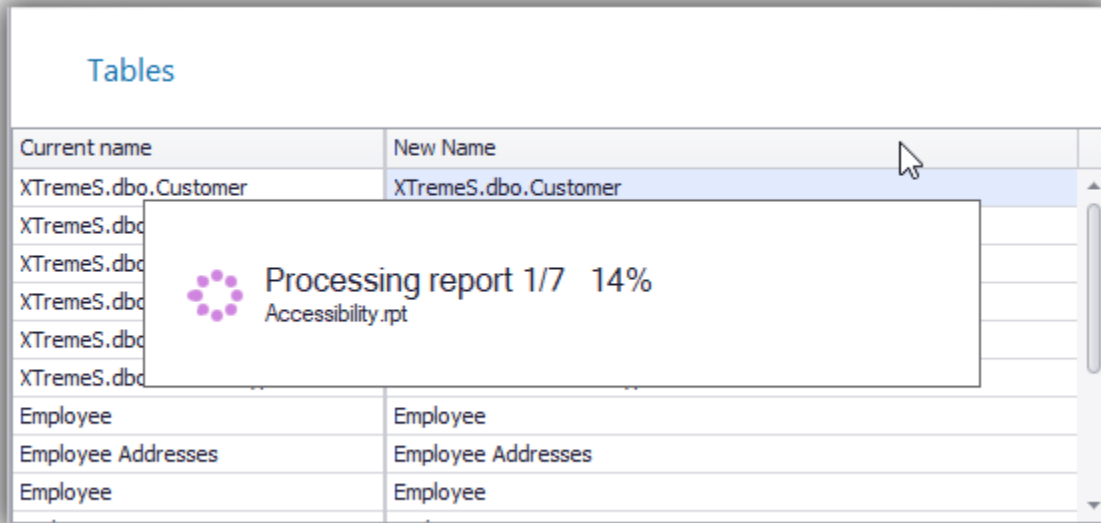

Once all reports are processed R-Tag will go to the next screen "Security"
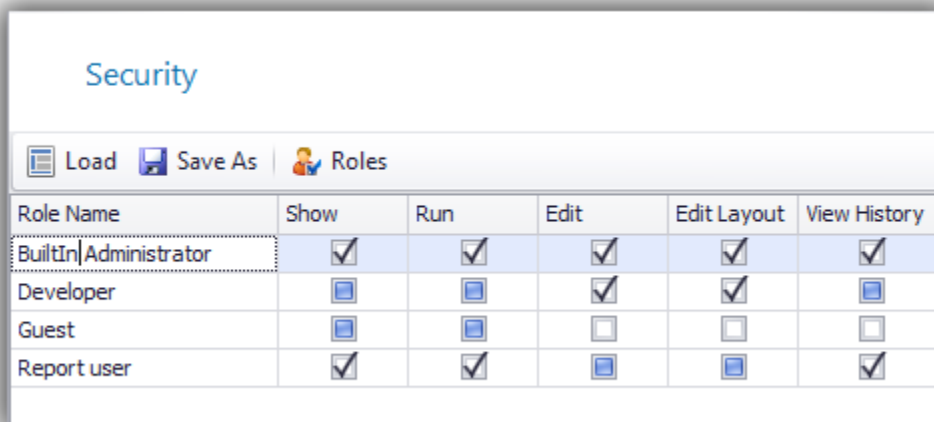
You need to select the permissions associated with the reports. There are 3 options for each feature. Checked (allowed), Unchecked (Denied) and Unknown
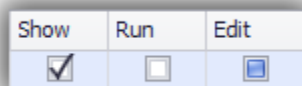
These permissions will be set by role and the user permissions will be determined based on the roles assigned to the user. For example, with the example above users who are members of the role "BuiltIn Administrator" will have full permissions. The same set of permissions will have users who are member of roles "Developer" and "Report user". These users will inherit "Show", "Run" and "View History" permissions from "Report user" and "Edit" and "Edit Layout" permissions from role "Developer" so they will have full permissions. Just theoretically, if a user is member of roles "Developer"and "Guest" the user will have no permissions since neither of the roles is allowing "Show" and "Run" and role Guest denies access to "Edit", "Edit Layout" and "View History". Since Deny has priority over Allow the user will be denied access to any of these features. Click "Next" and R-Tag will add the reports to the Reports' tree
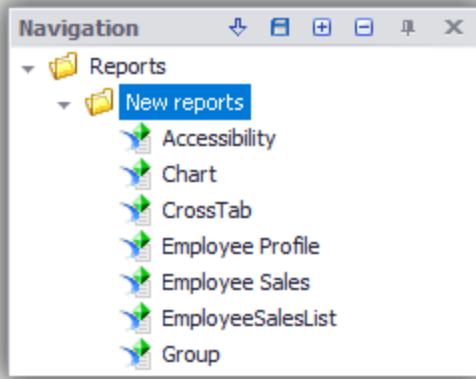
Notice the difference between the icons for reports imported with Meta data, which can be used in

Documentation/Search and Viewer/Scheduler compared to regular reports imported just to be used in

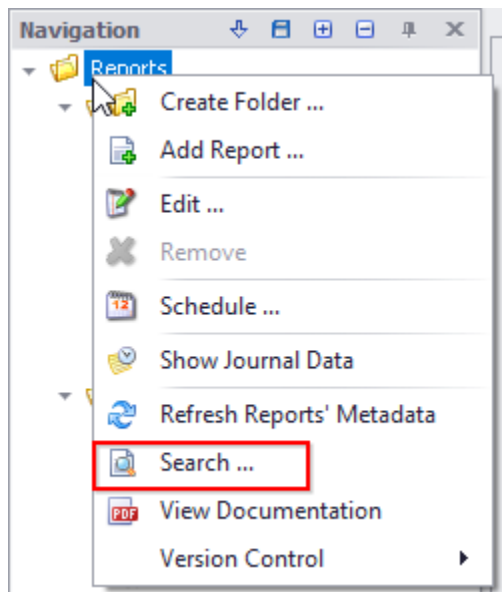Viewer/Scheduler   . Icon for reports with Meta Data has a small page

Import single report

Single report will be added in the same way as it is added when used in Viewer/Scheduler. Please make sure "Get MetaData" option is checked. You can find details how to add reports for Viewer/Scheduler here
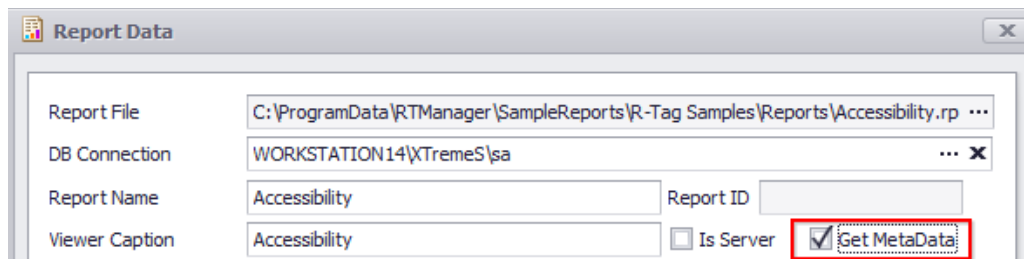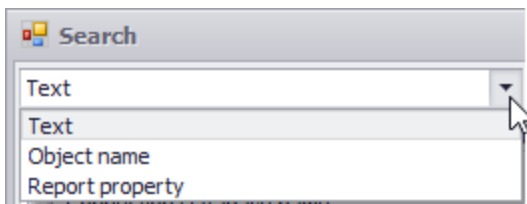

Search

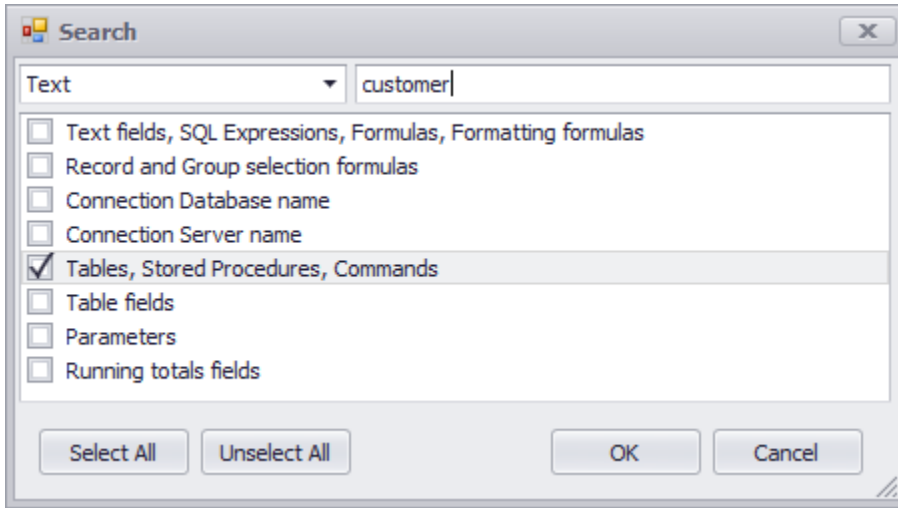To start searching use right menu "Search …"

You can select the very top folder (Reports) and then you are going to search all report, but you can narrow the search by selecting a subfolder or report.

R-Tag can search report metadata in 3 different ways: Text, Object name and Report property

Search by Text

As it is shown in the screenshot above, select search type "Text" and type the text you want to search. You can narrow the search by selecting one of the options. The example above will find all reports with tables containing the text "cutomer". For example reports with tables "NewCustomers", "Customers"," dbo.Customers", "CustomerOrders" etc. Search is not case sensitive. You may select more options, if you do not select any option R-Tag will search for all options as if they all were selected. Here is an example how the result screen will look like for search for text in all options (not just tables)

| ID	Version ID	Report	Path	Report File ...	Subreport ...	Is Subreport	Field Type	Field Name	Text Data
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	SQL		SELECT `Credit`.`Credit Authorization Number`, `Credit`...
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	FormulaFieldDefinition	Contact name	"Contact: " + {Customer.Contact First Name} + " " + {Cus...
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	Field	FormulaName	{Customer.Contact First Name}
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	Field	FormulaName	{Customer.Contact Last Name}
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	Field	FormulaName	{Customer.Customer ID}
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	Field	FormulaName	{Customer.Customer Name}
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	FieldObject	FormulaName	CustomerName1
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	Table	Name	Customer
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	SQL	Text	SELECT `Credit`.`Credit Authorization Number`, `Credit`...
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	TextObject	Text2	By Customer
4	4	Accessibility	C:\ProgramDa...	Accessibilit...	<<MainRe...	☐	TextObject	Text7	Total Credit Amount Sum ({Credit.Amount}, {Customer.C...
5	5	Chart	C:\ProgramDa...	Chart.rpt	<<MainRe...	☐	RecordSelectionFor...		//Record Selection to return specific records in order to make
5	5	Chart	C:\ProgramDa...	Chart.rpt	<<MainRe...	☐	SQL		SELECT `Customer`.`Country`, `Customer`.`Customer ...
5	5	Chart	C:\ProgramDa...	Chart.rpt	<<MainRe...	☐	Field	FormulaName	{Customer.Country}
5	5	Chart	C:\ProgramDa...	Chart.rpt	<<MainRe...	☐	Field	FormulaName	{Customer.Customer Name}
5	5	Chart	C:\ProgramDa...	Chart.rpt	<<MainRe...	☐	Field	FormulaName	{Customer.Last Year's Sales}

As it is shown on the screenshot R-Tag found the text customer in Table names, Formulas, Text fields, reports' SQL etc. each record contains the report name, report file name, identifier for main report or subreport, field type, field name and value, which contains the text. Using the filter and find options you can further search the returned data. This secondary search is very powerful since you can create filters with very complex "AND" and "OR" clauses. In the same way as showing filter during the import you can show filter dialog right clicking any column caption.
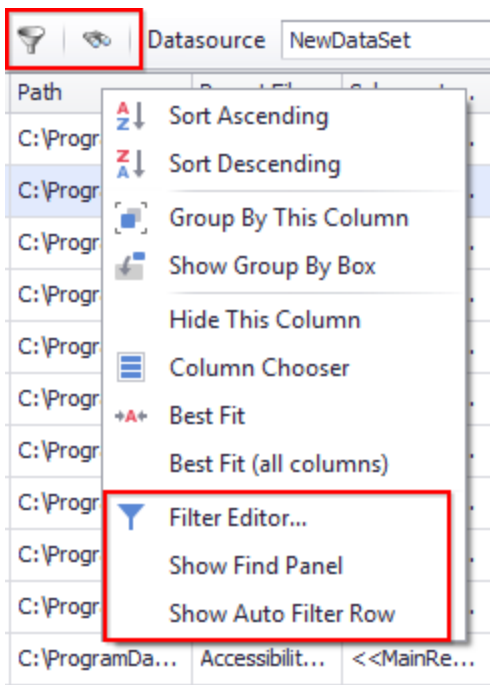
In addition, you can use the toolbar buttons Filter Row and Find. To use Filter Row:

1. Click the button "Filter row"
2. Insert the text in the column you want to search
3. If you want to create more complex filter edit and adjust the filter using the button in the bottom right corner
4. Un-apply the filter by unchecking the checkbox in the bottom left corner or select another filter
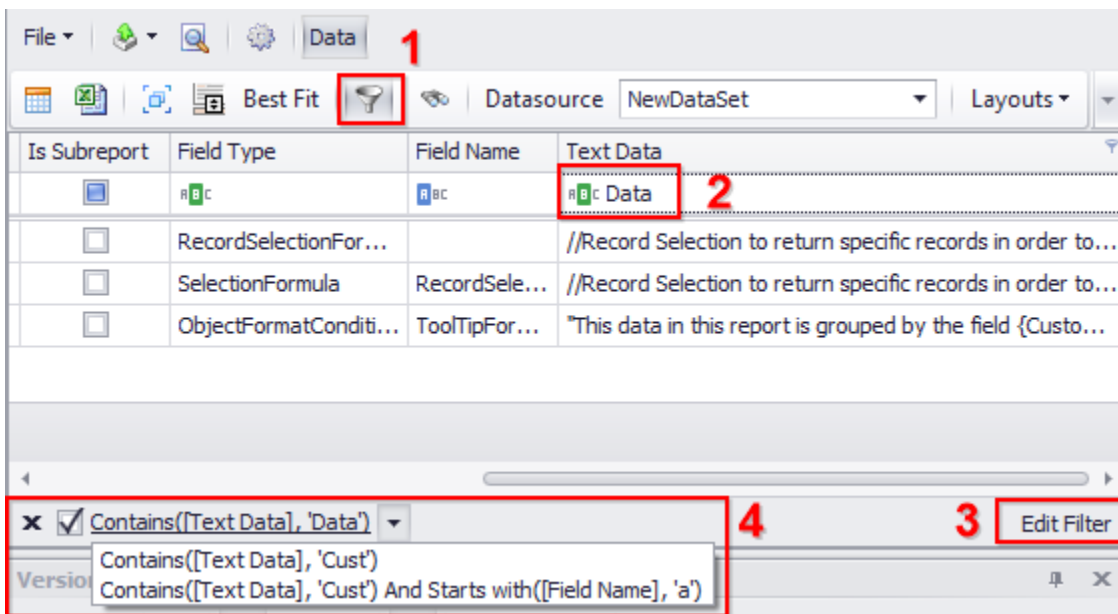

Search by Object name

To search by Object name, select search type "Object name", insert the text you want to search for and select the object type. The example bellow will search for pictures, which name contains the text "logo"
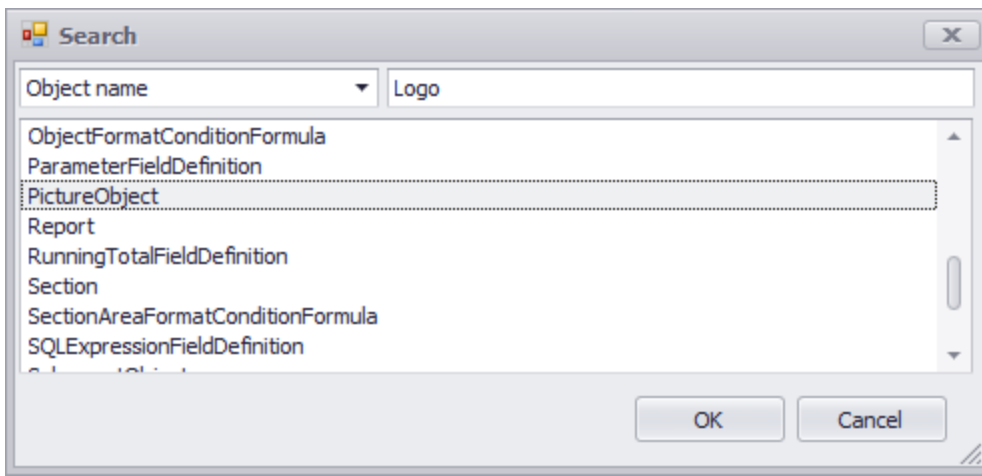
Search by Report property

To search by Report property, select search type "Report property" and select the desired. There are more than different 250 properties in Crystal reports and they are available in a hierarchical structure. For example, the screenshot below is an easy way to find all reports with saved data.
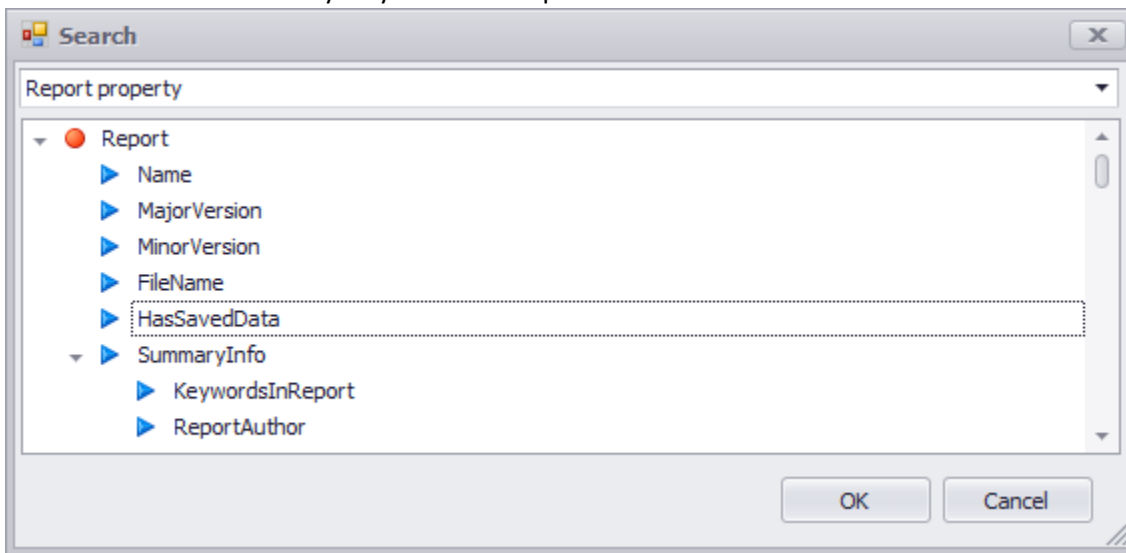
This search will show a list of all reports in the searched folder and the value of the property

ID	Version ID	Report	Path	Report File ...	Subreport ...	Is Subreport	Parent	Item	VALUE
4	4	Accessibility	C:\Progra...	Accessibilit...	<<MainRe...	☐	Report	HasSavedD...	True
5	5	Chart	C:\Progra...	Chart.rpt	<<MainRe...	☐	Report	HasSavedD...	True
6	6	CrossTab	C:\Progra...	CrossTab.rpt	<<MainRe...	☐	Report	HasSavedD...	True
7	7	Employee P...	C:\Progra...	Employee P...	<<MainRe...	☐	Report	HasSavedD...	True
8	8	Employee S...	C:\Progra...	Employee S...	<<MainRe...	☐	Report	HasSavedD...	False
9	8	Employee S...	C:\Progra...	Employee S...	Employee S...	✓	Report	HasSavedD...	
10	9	EmployeeS...	C:\Progra...	EmployeeS...	<<MainRe...	☐	Report	HasSavedD...	False
11	10	Group	C:\Progra...	Group.rpt	<<MainRe...	☐	Report	HasSavedD...	True

It is easy to group by value using the button "Group" in the toolbar and dragging column "Value" caption to the top of the grid

Examples for other useful searches are: Show a list of all reports in a folder and their printer names, paper sizes, authors, version   used to create the report etc. In such a way you may easily find, which reports have to be updated if you are going to retire a network printer, which reports are not following your company standard and are using paper size A4 instead of Letter etc.

Create documentation

To open report documentation, select the report and click button "Data"

R-Tag will show the available meta data as formatted HTML, PDF and a searchable tree (Report explorer)

All the data available in this documentation is available through search feature. Search is more powerful since you can review big amount of data using filters. Documentation might be useful in case you want quickly to review reports' SQL or formulas since this data is formatted in an easy to read way. Here is how Formulas section for

sample report Chart.rpt is presented:

Formulas

Name	Text	Type	Uses
Days to ship	//Calculate how many days it took to ship a product {Orders.Ship Date}-{Orders.Order Date}	NumberField	1
Late or On Time	//Determine if the shipment was Late or OnTime if {@Required Date} - {@Received Date} >= 0 then "On Time" else "Late"	StringField	4
Required Date	//Create a RequiredDate value datetimevar requireddate:= date({Orders.Required Date}) + time((Int(Rnd*24)), 0, 0)	DateTimeField	2
Received Date	//Create a ReceivedDate for value datetimevar receiveddate:= date(dateadd("d", Int(1.1/Rnd), {Orders.Ship Date})) + time((Int(Rnd*24)), (Int(Rnd*59)), 0)	DateTimeField	2
Group	//Assign a specific Country to a specific Chart Type. Used for grouping on. Select {Customer.Country} case "New Zealand": "Bar Chart" case "Australia": "Line Chart" case "Brazil": "Area Chart" case "Canada": "Pie Chart" case "China": "Doughnut Chart" case "Italy": "3D Riser Chart" case "Japan": "3D Surface Chart" case "Germany": "XY Scatter Chart" case "England": "Radar Chart" case "Mexico": "Bubble Chart" case "France": "Stock Chart" case "Switzerland": "Numeric Axis Chart" case "Singapore": "Gauge Chart" case "USA": "Gantt Chart" case "Portugal" : "Funnel Chart"	StringField	5
Fake Value	whilereadingrecords; 1	NumberField	1

You can also open documentation using right mouse click, menu "View documentation".
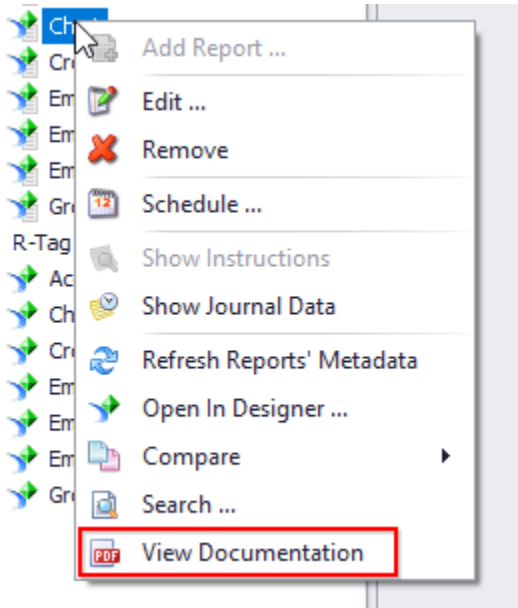
Documentation will be shown just as a PDF file. The advantage of this option is that you can show documentation for a whole folder of reports. R-Tag will generate a single PDF, which will include documentation for all reports. There will be also a Bookmark for each report for easy navigation.

Compare reports

R-Tag is able to compare different reports and show differences. Select the first report you want to compare using right click menu -> Compare -> To Report …

In the Report list dialog select the second report you want to compare and click OK
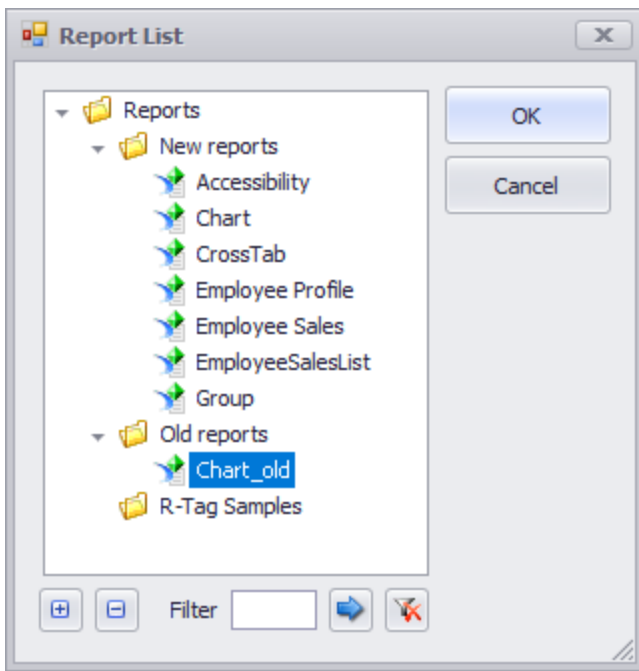
Differences will be shown in a separate window. There are different modes:

- Full list: shows all elements from both reports, all expanded or all collapsed
- Hide equals: shows just the different elements from both reports and their parents
- Smart expand: Show all elements. Equal elements are collapsed, different are expanded

Here is a sample view of Hide equals mode. The toolbar contains groups to change the mode, navigate through the differences, print and export to Excel the differences, switch the first and second reports and filter the data