

Steps when you start the program for the first time

R-Tag Installation will install R-Tag Report Manager and a local SQL Server Compact Database, which is used by the program. This will allow you to start to use the program immediately. However, there are few things that you can do before to start using the program:

Choose the right database.

R-Tag Report manager is using a database to save information about the reports, jobs, users, permissions etc. R-Tag supports 2 database types:

1. Local database

This is a SQL Server CE database, which does not require special installation. It is installed and configured with R-Tag installation. Local database supports limited features and is mainly used for the initial test and to get a basic idea for the features available in R-Tag.

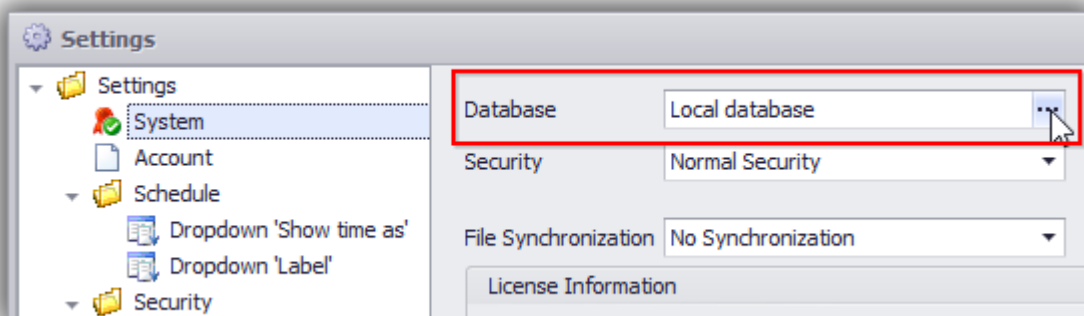
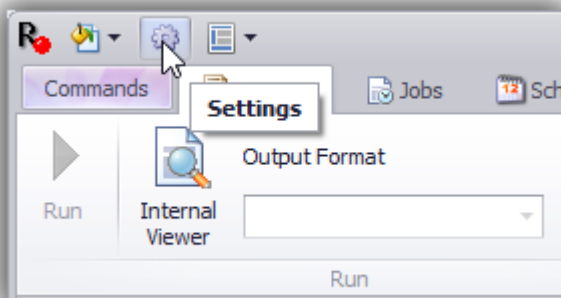
2. SQL Server database

When you have the program installed on more than one computer and you want to manage reports, schedules, user's permissions etc. from one place then you need to use SQL Server database. You need to use SQL Server database also in cases when you are installing the program initially on one computer but you are planning to use it on multiple computers later. **It is always a better idea to use SQL Server database.** You will have more options and more features.

To install SQL Server database check the document [Installing SQL Server database for R-Tag](#)

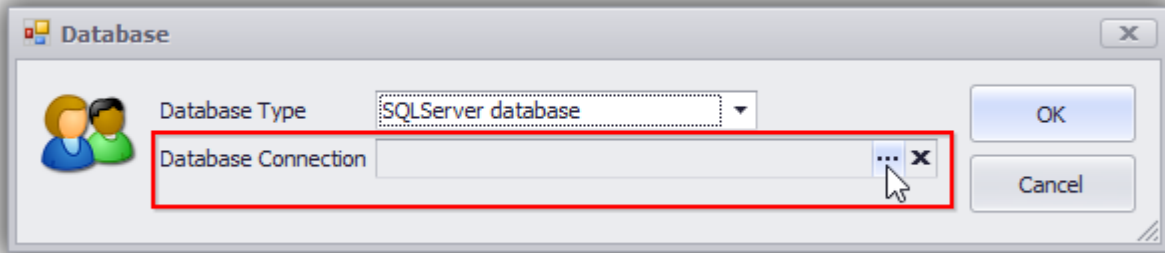
SQL Server database should be installed just once. If you are installing additional copies of R-Tag you can connect it to an existing SQL Server database.

During the first start R-Tag Report Manager will connect by default to the local database. If you want to use an existing SQL Server database you should switch to it before to do anything else. To switch to the SQL Server database open Settings and select "System" from the tree.

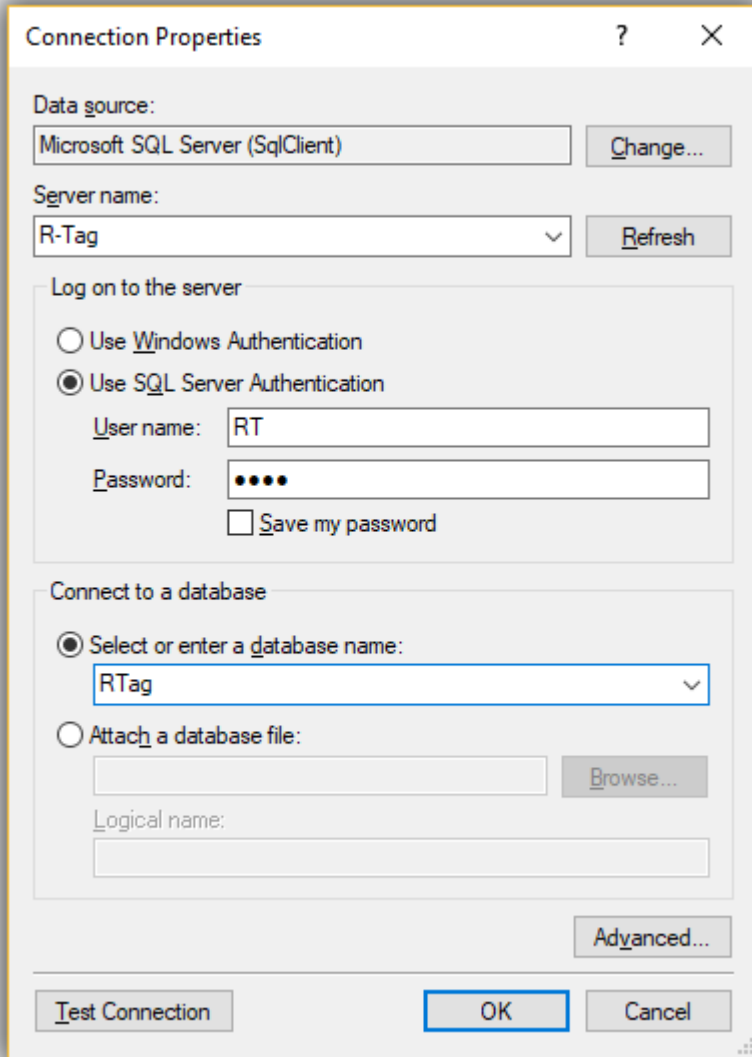


In the "Database" dialog edit the "Database Type" field and select "SQL Server Database"

Edit the "Database Connection" field and create a connection the existing R-Tag SQL Server database



Select the database created with the "Database installer for SQL Server" tool:

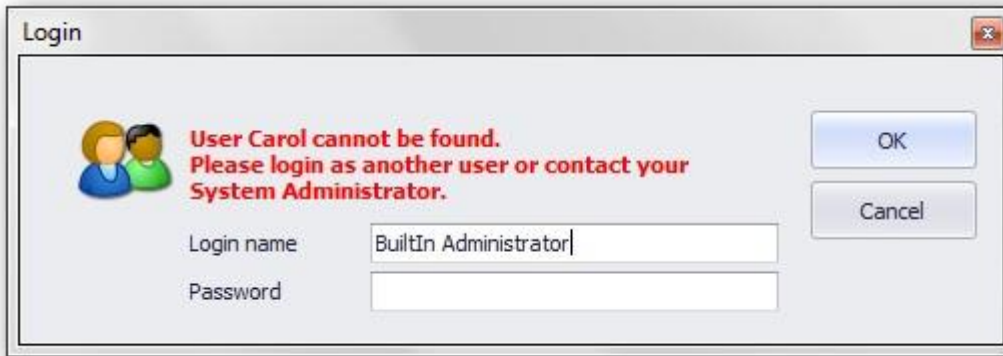


Set "BuiltIn Administrator" password


During the first start the program will login as "BuiltIn Administrator". This user is created by the installation with an empty password. This user is the equivalent of System Administrator. It is not possible to delete this user or to disable his permissions to manage other users. To avoid security issues change the password before to do anything else.

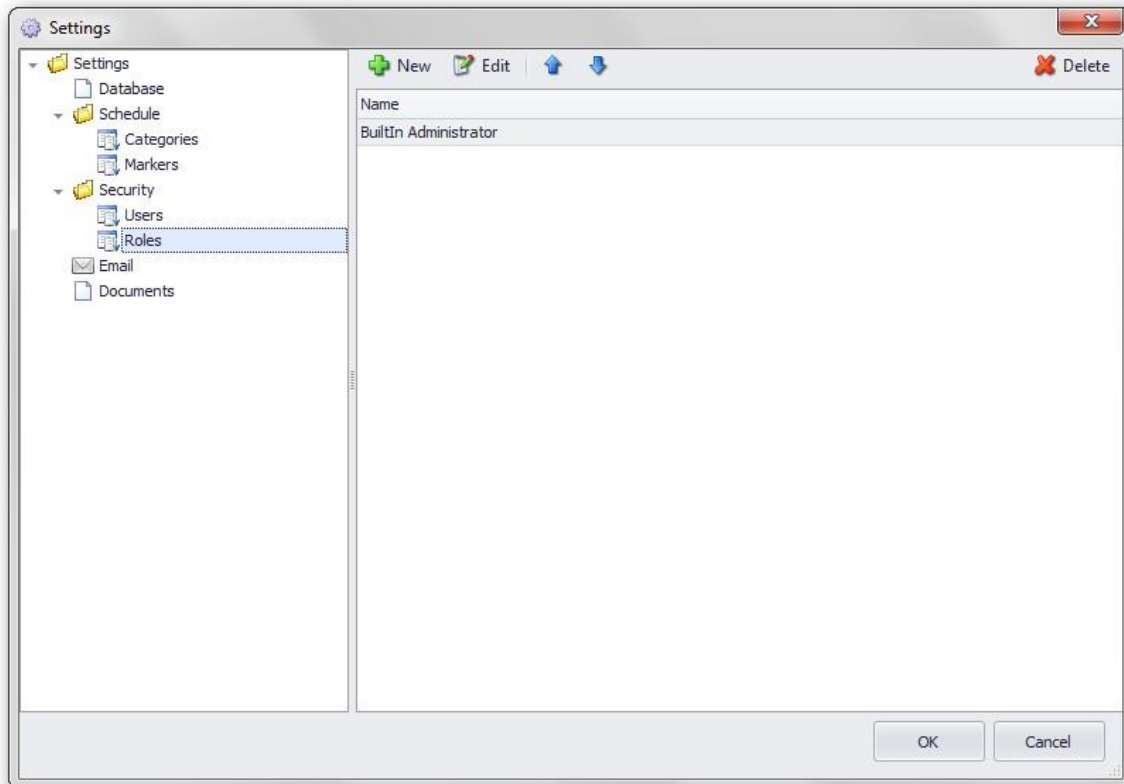
Create roles and users

It is a good practice to NOT use the user "BuiltIn Administrator" except in cases when you need to manage users and roles and you don't have available another user with permissions to do this. Best practice is to create a separate login for each user, which is going to use the system. If you choose to not create new users, the second time when you start the application you will see the login screen:

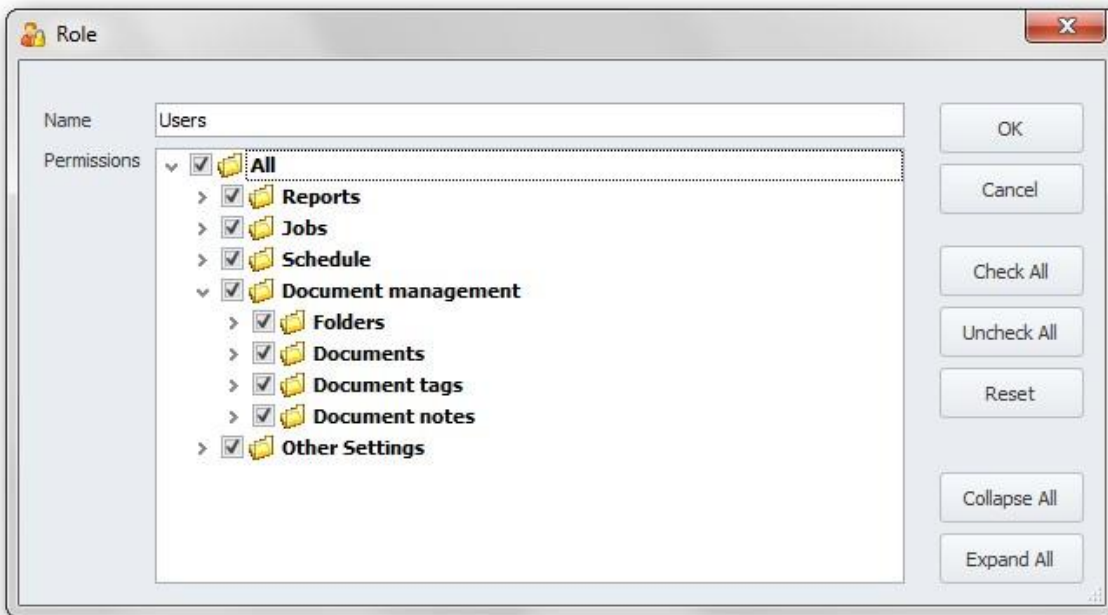


Role management

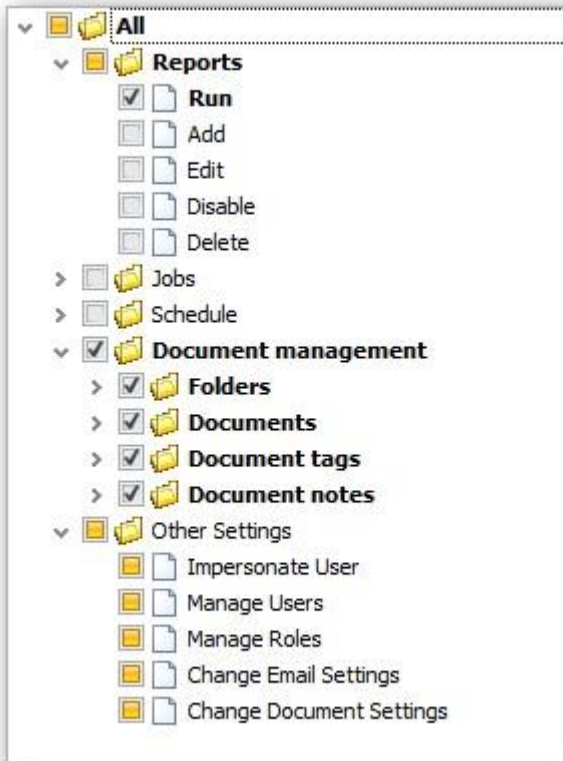
Roles might be set from Settings dialog, which might be invoked, with the button  from the main screen. The permissions are organized in Roles. Multiple roles might be assigned to one user. The BuiltIn Administrator role is created during the setup (and assigned to BuiltIn Administrator user). You can create a new role using button New.



Roles settings include name and permissions. Permission might have three values: Yes, No and Not Set



The example below shows a combination of permissions, which will allow to run a report, but will not allow to add, edit, disable and delete reports. Settings for the section Other Settings will not be set. If the user is a member of multiple roles and one of the other roles has full permissions for Reports and Other Settings he or she will still not be able to add, edit, disable and delete reports, because this is explicitly forbidden by this role, but will be able to work with Other Settings because they are allowed by the other role and not set by this role.



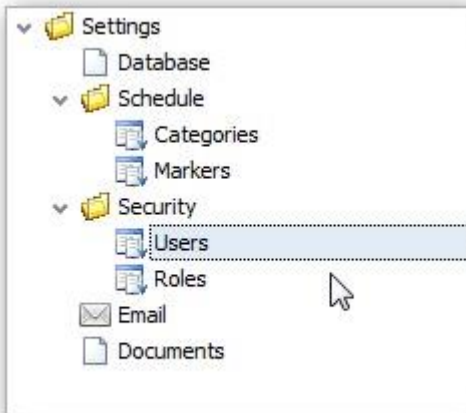
The result for values is: Not Set = Forbidden

Not Set + Forbidden = Forbidden
 Note Set + Allowed = Allowed
 Allowed + Forbidden = Forbidden

User Management



Users can be set from Settings dialog, which can be invoked, with the button from the main screen.



Personal data and roles for the user will be set in the User screen. The screen below shows the data for the user Carol Young, member of the role Users. The user will inherit all permissions associated with the assigned roles.

The 'User' dialog box contains the following fields and controls:

- Login Name: Carol
- Password: masked with asterisks
- Confirm Password: masked with asterisks
- First Name: Carol
- Last Name: Young
- E-mail: empty field
- Roles table:

Is Member	Role Name
<input checked="" type="checkbox"/>	Users
<input type="checkbox"/>	BuiltIn Administrator

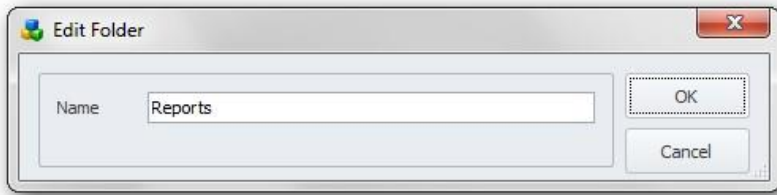
Buttons: OK, Cancel

Report management

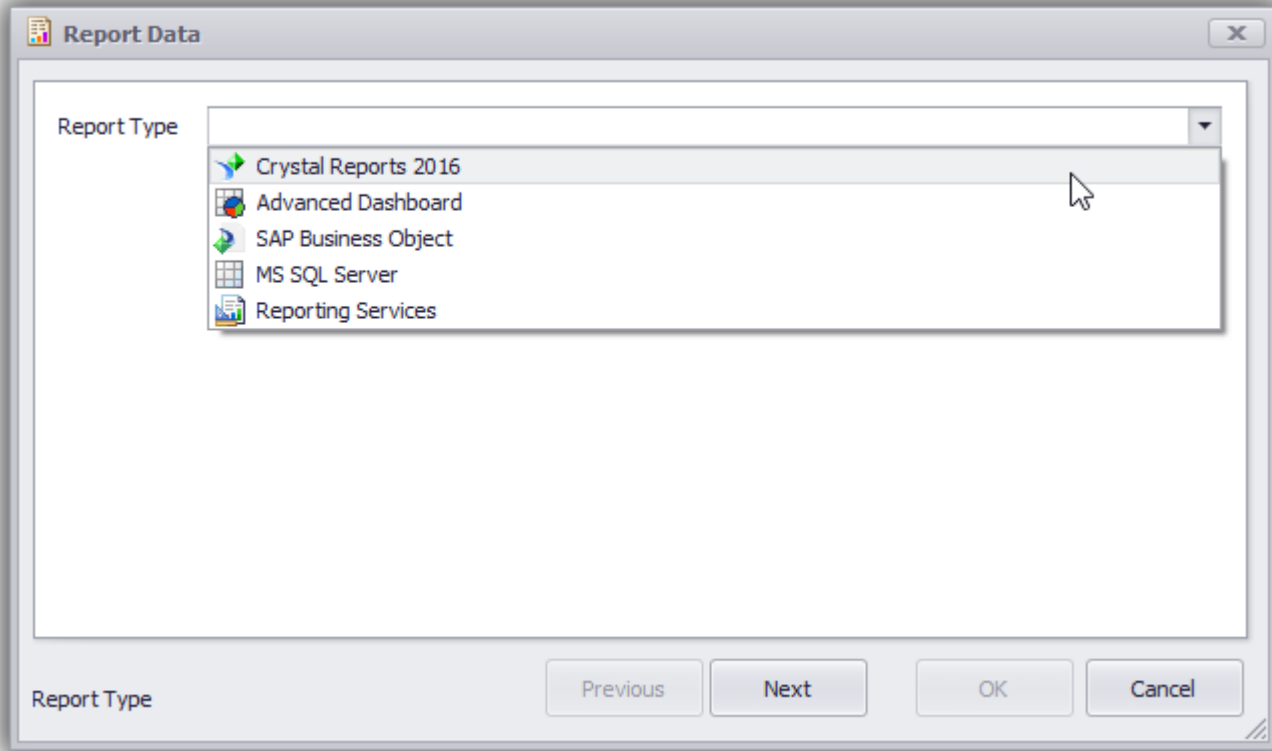
Adding editing and deleting reports and folders is available through these buttons on the main form:



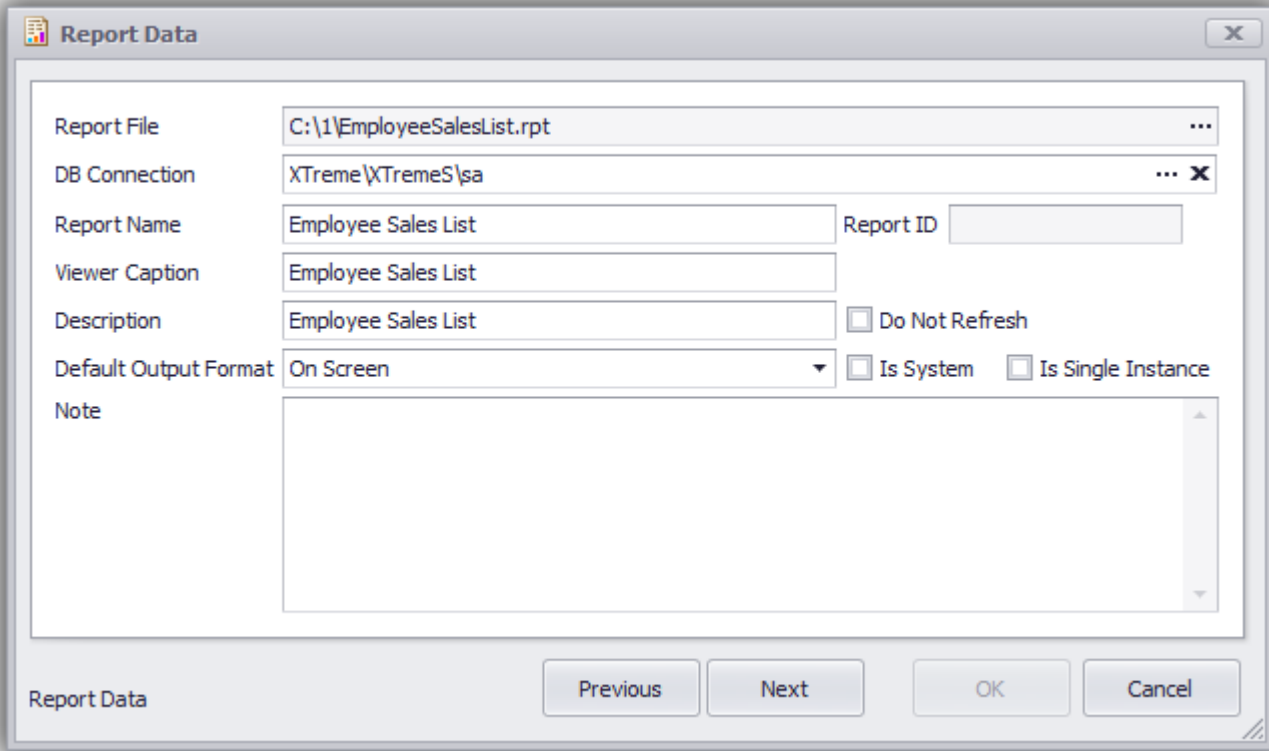
Create/edit folder will show a simple dialog box to edit the folder name



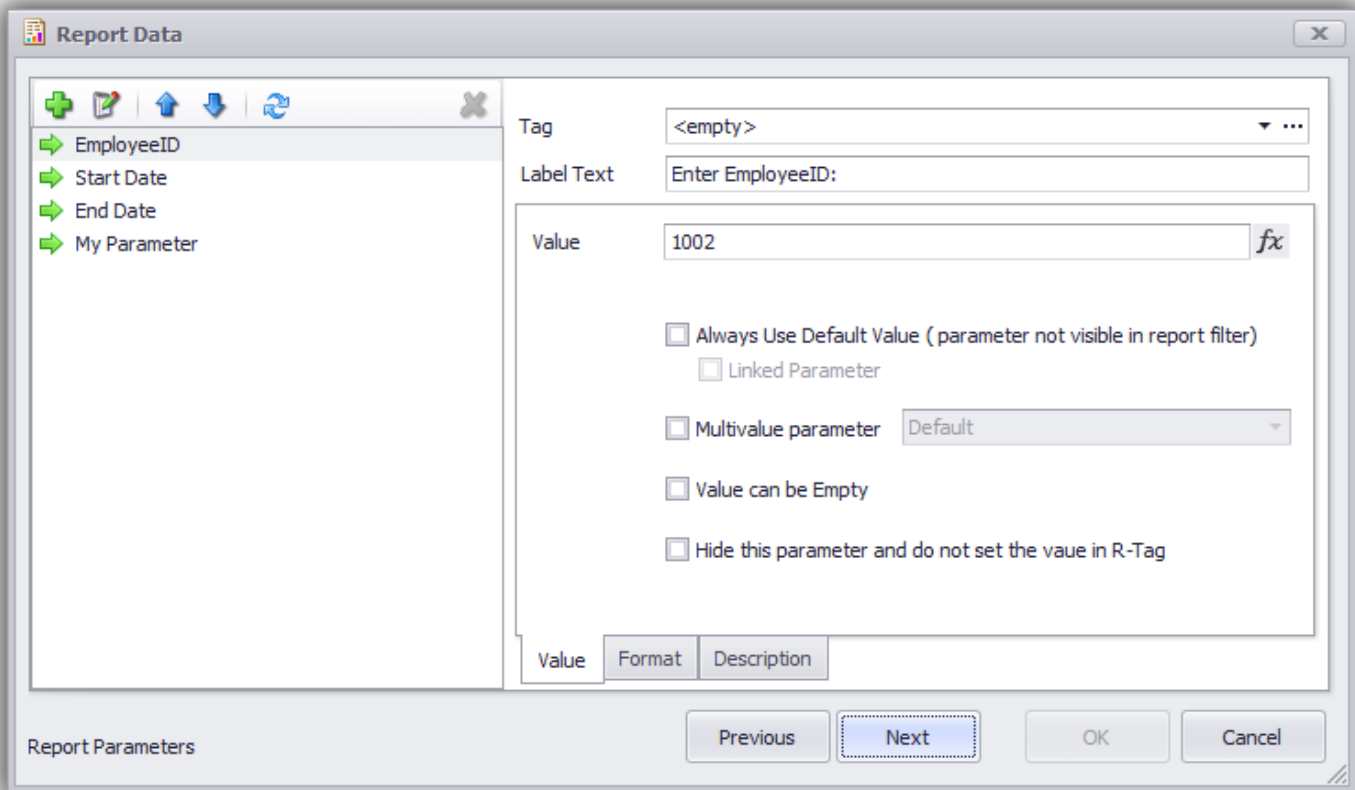
Create / edit report will show a wizard dialog, which will guide you through the steps to add/edit a report. First step is to select the report type. This step will be disabled when an existing report is edited. Report type combo box will show all available plug-ins. As of now, plug-ins for Crystal Reports 2011, Reporting Services 2005/2008 and MS SQL Server ad-hoc queries are available. Other plug-ins will be available shortly.



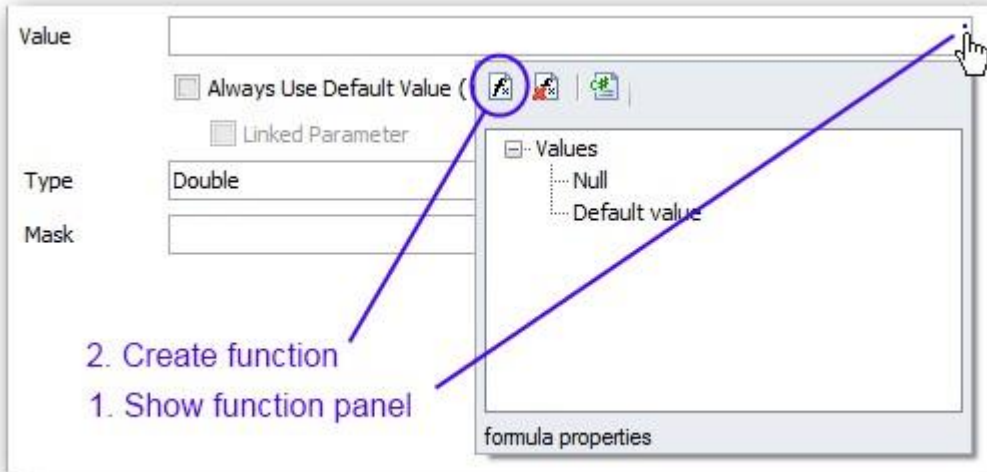
The example bellow shows the screen to set data for crystal reports. Once a report is selected, DB Connection, report name and the available output formats will be loaded. The DB Connection loaded from the report will not contain enough information to login and you need to edit it.



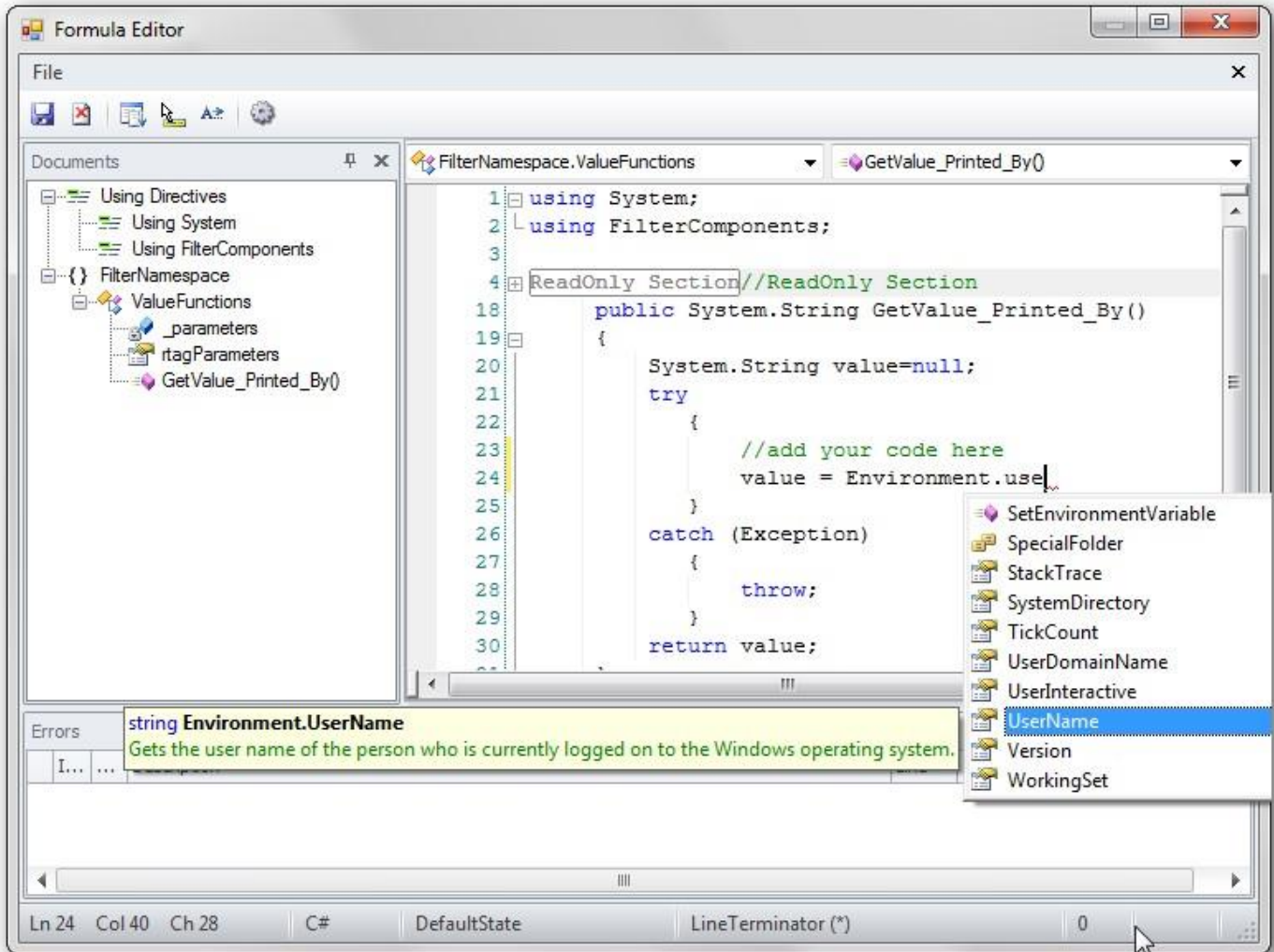
The next step is to edit the parameters' data. You can set default values, connected tag and data source for parameter values.



Default value can be set as a constant or as a function. As it is shown on the screenshot the value 2 will be set for the parameter Employee ID when the report is loaded. If you need more complex way to set the value you can use relative dates (for date parameters) or C# code available from the blue dot of the upper right corner of the value control:

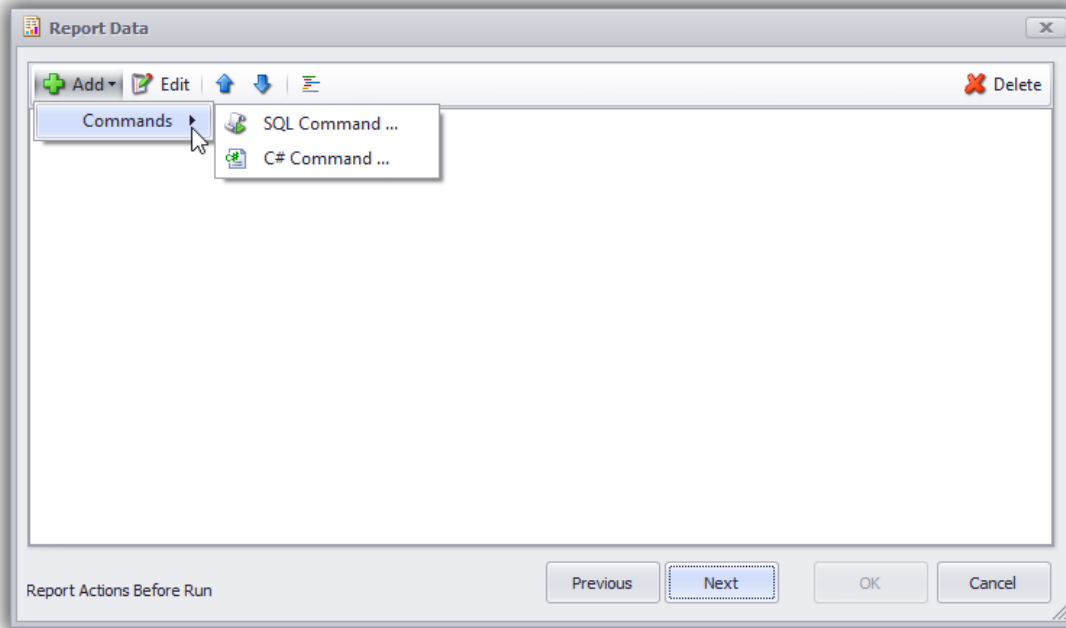


Source editor will be shown and you will be able to create a function, which will be used later to calculate the value.

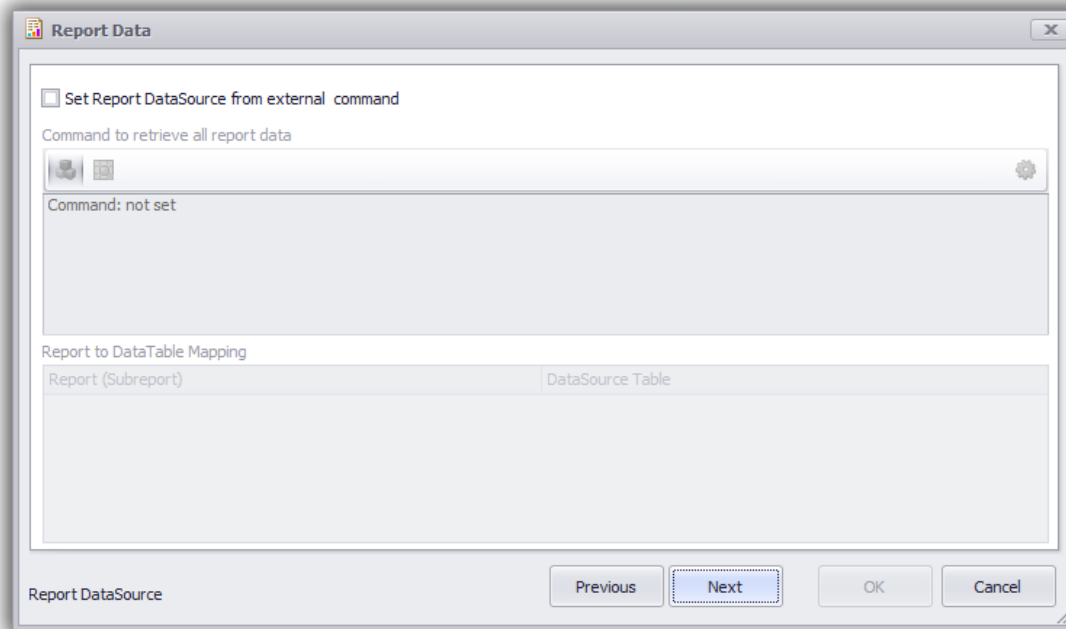


The provided example will get the current user name and will set it as a default value for parameter "Printed By". If you are not familiar with C# you can contact us. Questions about simple functions are not considered as technical support and will not cost you anything.

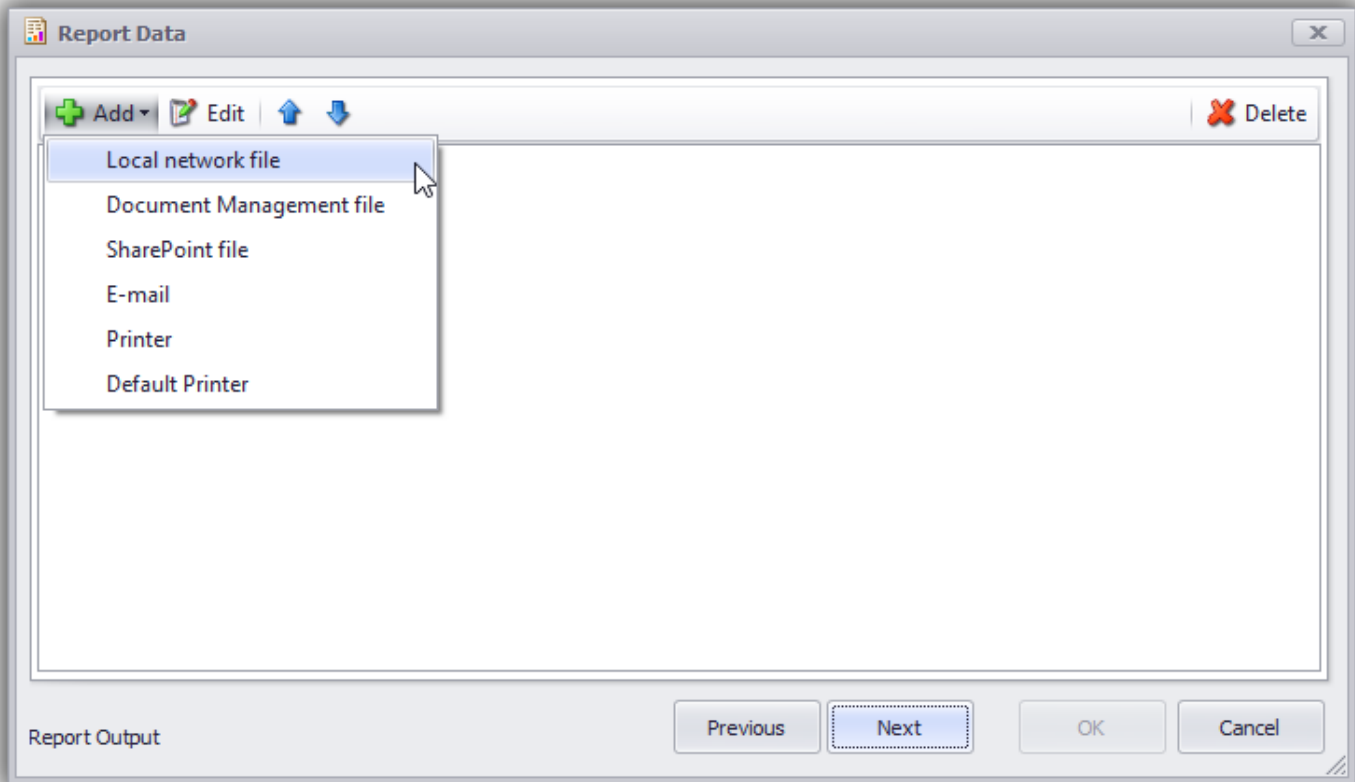
The next step is optional. It will allow you to define a SQL or C# commands , which will be executed before the report is started. SQL command might be useful to prepare data. C# command might be useful to clean folders, move or rename existing files generated during previous report runs.



The next step is optional too. It will allow you to use PUSH method and to set the report dataset from a command. This step might be very useful for reports with sub-reports and will allow you to retrieve all the data with one call to the database and distribute it between the report and sub-reports.

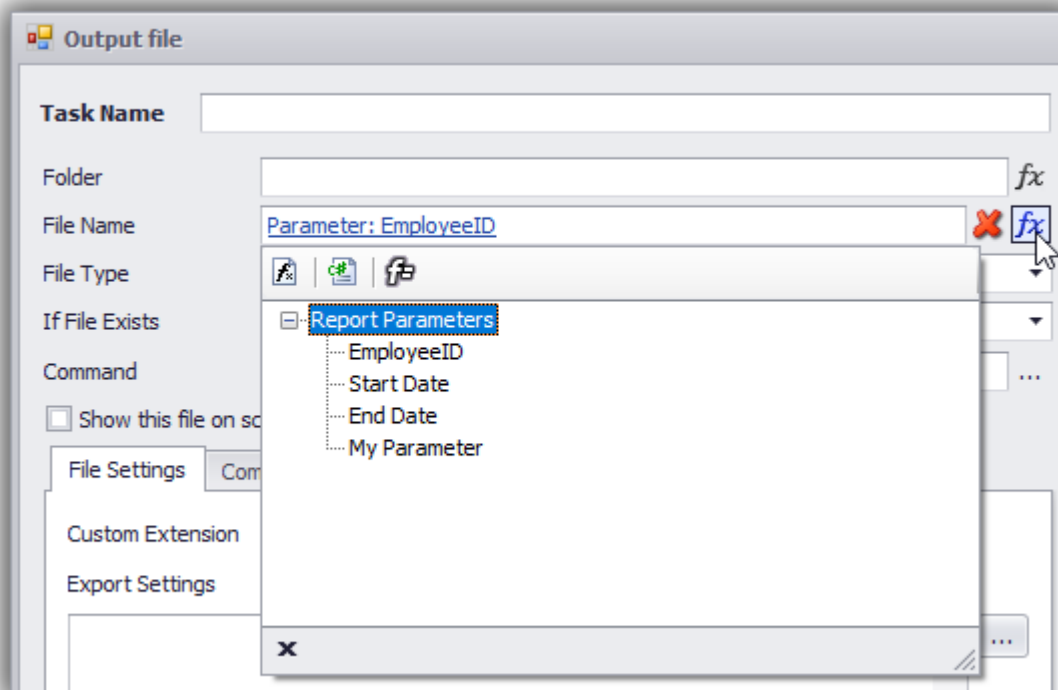



Next step will create the report output. As of now the output options are: Local network file, Document management file, SharePoint file, E-mail, Printer and Default Printer.

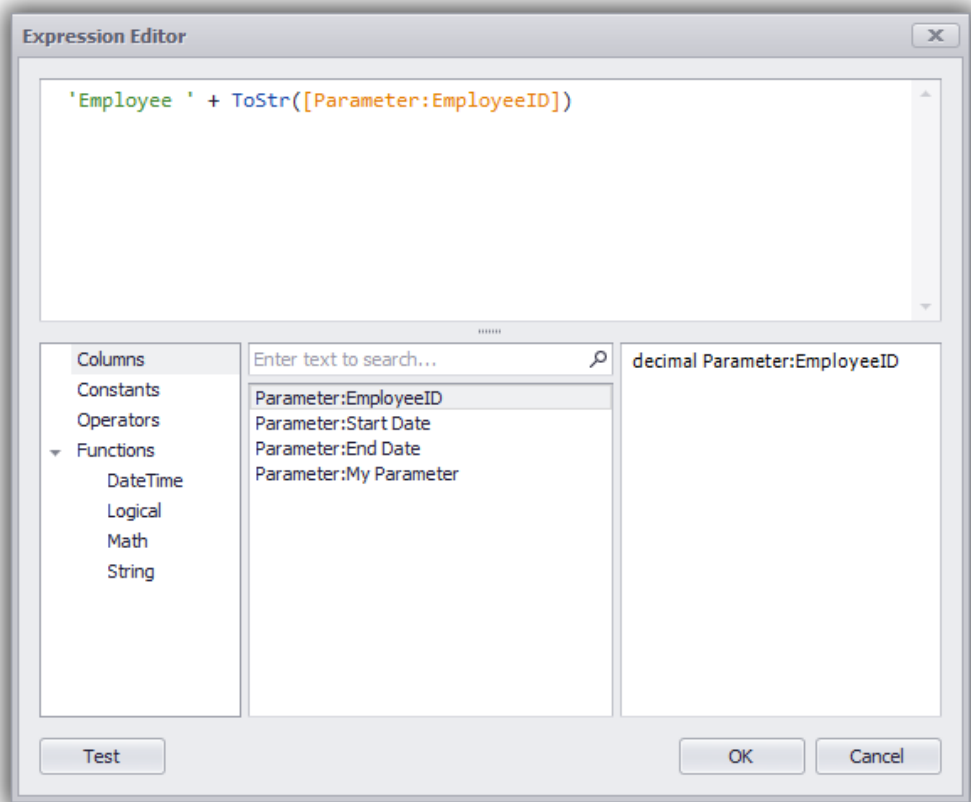


Document management is available just for SQL Server database.

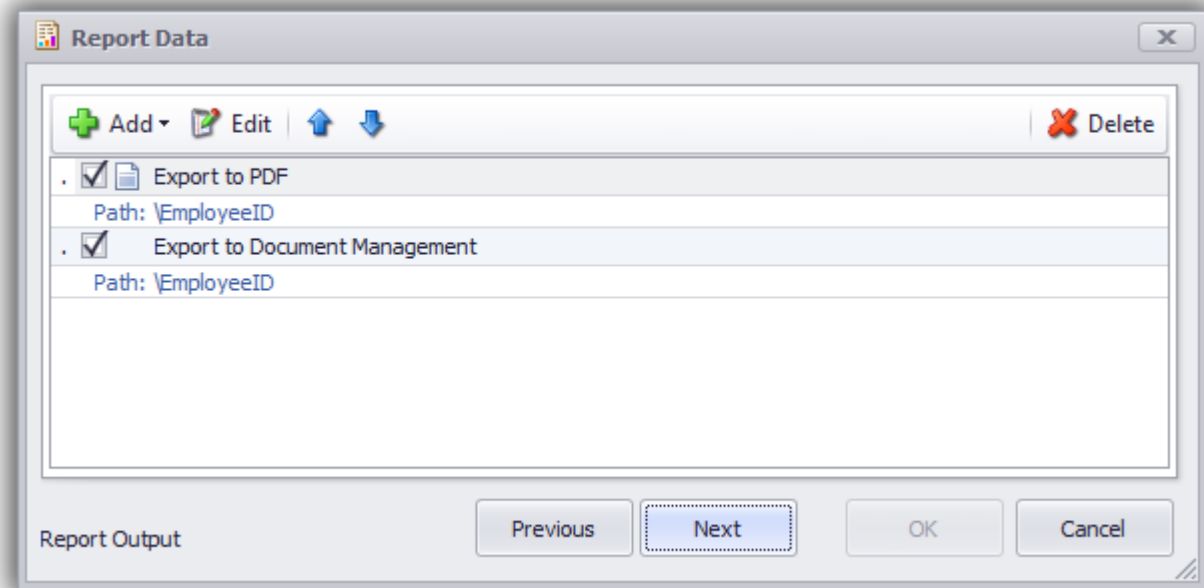
The Output file dialog supports variables in similar way as default value. Report parameters are available for direct use when folder and file name are created.



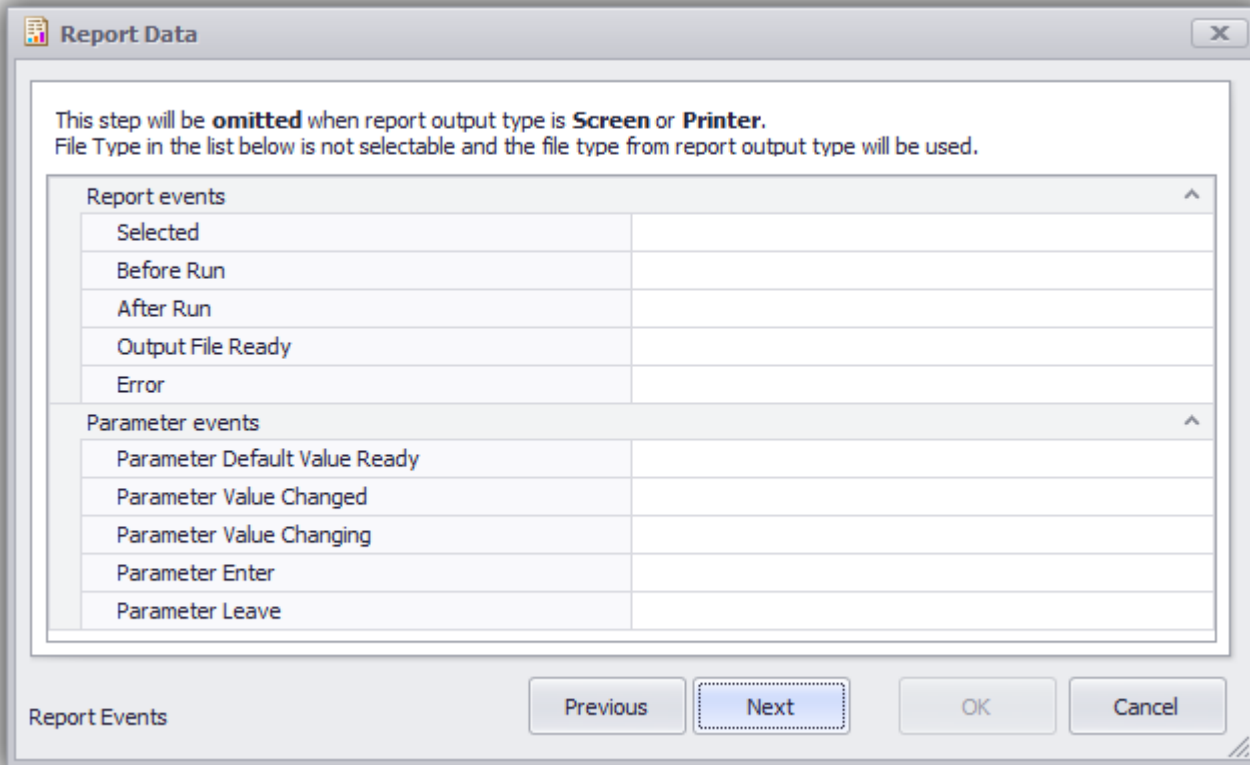
This formula panel provides also a button  , which can be used to create formula expression.



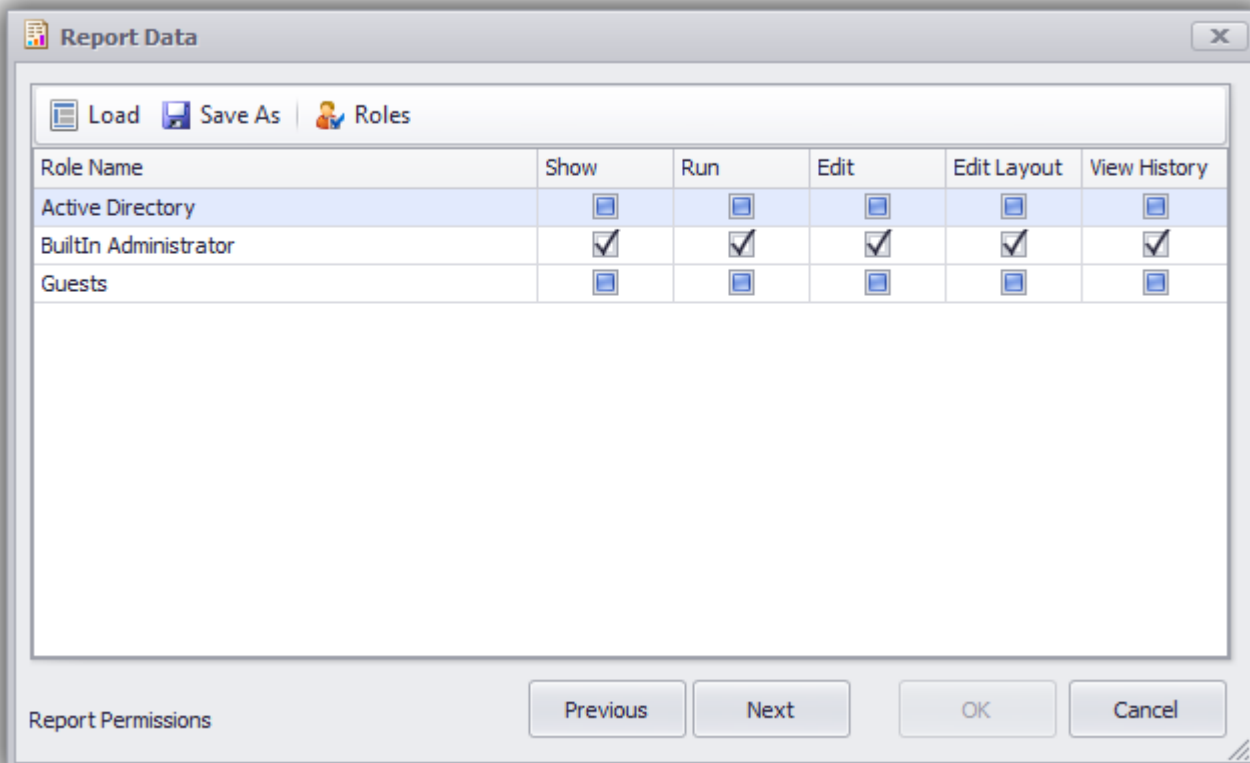
After creating the outputs, they will be show in the list for editing. You can create multiple outputs for the same report.



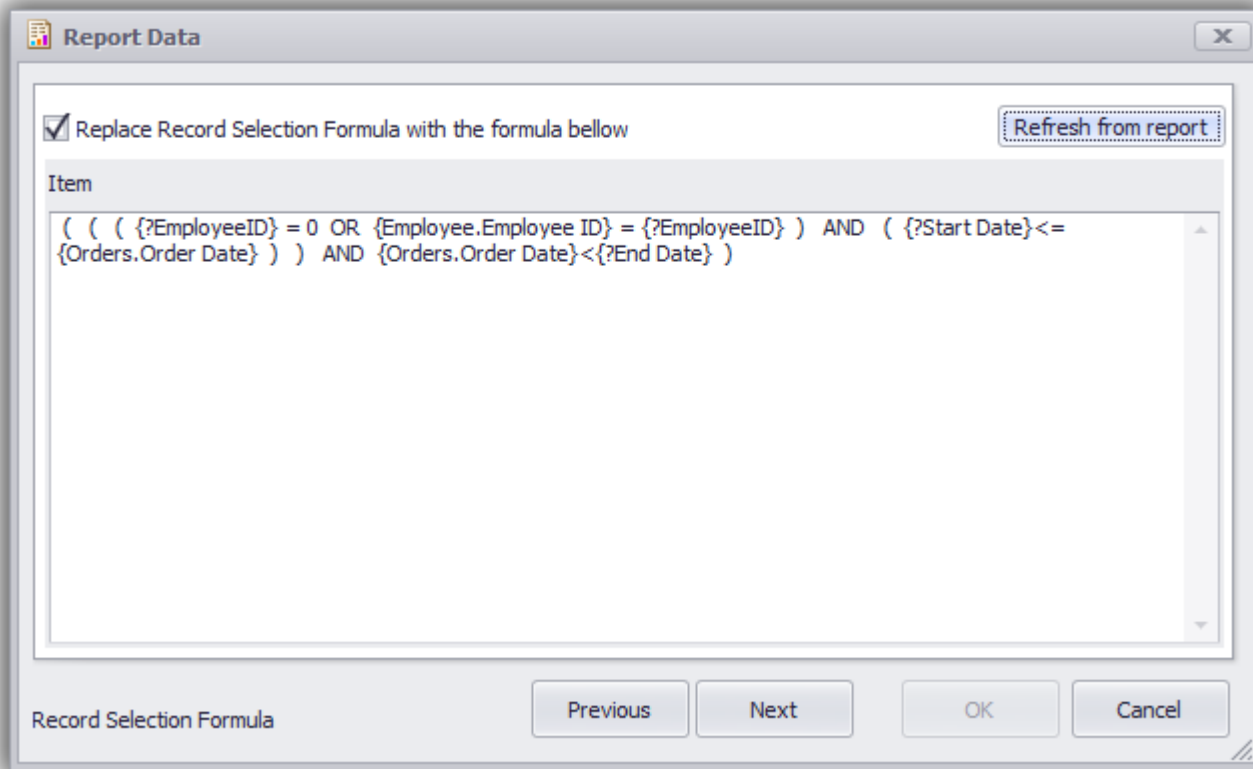
“Report Events” is the step where you can place your C# code to handle different scenarios. For example, you can add some code to check if the parameters’ values are correct in Before Run event and to cancel the report if something is not set correctly



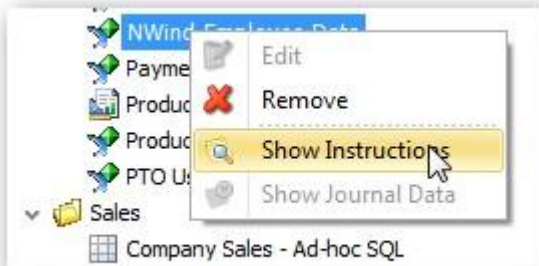
Report permissions step will set the permissions for each role.



“Record Selection Formula” step is optional and will allow you to replace the existing record selection formula for the report.



"Report instructions" can be used to create instructions for the user how to use the report. It contains WYSIWYG editor similar to Microsoft Word. The document created with this editor will be available from the report right click menu:



Report Data

File Home Insert Page Layout References Review View Header & Footer Tools Table Tools Picture Tools

Design Design Layout Format

Clipboard Font Paragraph Styles Editing

Find Replace

This is the most powerful way to calculate dynamic values. Unfortunately you will need to have at least basic programming knowledge. X-Tag will provide you fully functional C# editor with intelligence and error reporting.

```

1 | using System;
2 | using FilterComponents;
3 |
4 | #ReadOnly Section//ReadOnly Section
5 |
18 | public System.String GetFileName()
19 | {
20 |     System.String value=null;
21 |     try
22 |     {
23 |         value = "Sales report as of " + rtagParameters["@AsOfDate"];
24 |     }
25 |     catch (Exception)
26 |     {
27 |         throw;
28 |     }
29 |     return value;
30 | }
31 |
32 | }

```

Errors

Image	Number	Description	Line	Col...	File	Project
	1	expected	22	76		

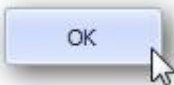
Intelligence is available in similar way as in Visual Studio

```

try
{
    Parameter prmAsOfDate = rtagParameters["@AsOfDate"];
    string strData = prmAsOfDate.To...
    value = "Sales report as of " +
}
catch (Exception)
{
    throw;
}
return value;

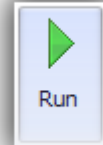
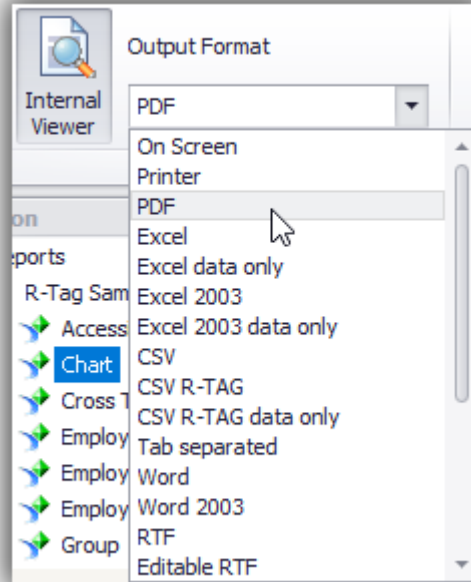
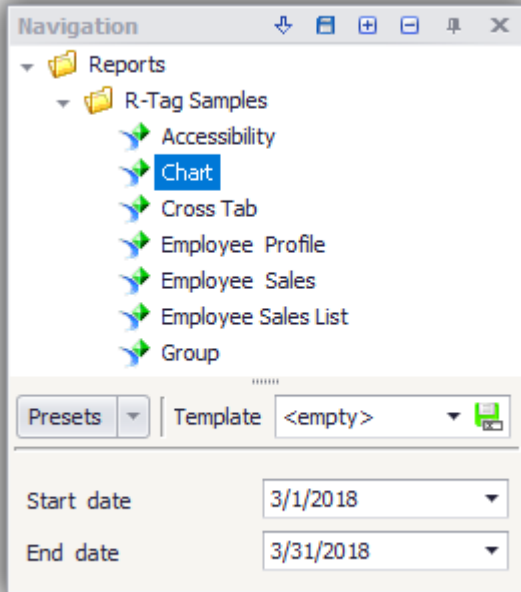
```

Report Instructions Previous Next OK Cancel



Click to save the report and to add it to the report tree.

When a report is selected in the tree, the parameters will be shown with preset default values



Selecting the desired output (for example Acrobat) and clicking Run button will execute the report and show the result in a MDI child form.

