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Add a Report, Index a Report, Remove a Report

See also [Index Specifications](#)

The indexing of reports is optional; indexing is only required if you want to create sub-indexes for (hierarchical) groups and sections of a report. Non-indexed reports can be viewed as easily and quickly as indexed reports.

To index a report

1. Organize the report print files into specially designated directories (for example functional classification, time periods, etc.). This step is not absolutely required, but strongly recommended.

The **base name** of the report file always becomes the root index (main index) name. If the base name of the report file is not appropriate, change the file name in the Windows File Manager (File | Rename) before you index the reports.

2. In the Drive list and Directories list, specify the drive and directory of the reports (the directory name must be double-clicked). You can filter out specific files with an entry in the Pattern field. In the Files list, highlight the report that you want to index.
3. Click the Create Index button, or choose Index Report from the File menu. The On-line Index Specification window is displayed.
4. The system displays the first 30 lines of the report. If index specifications are embedded in the report or exist in the index specification file, they are shown as default entries. If you want to change the specifications, choose the Clear button.
5. In the text of the displayed report, highlight the static label of the first group heading that you want to index (including any colons) and press the Paste button. If no errors are detected the index parameter is inserted in the Index Profile field above. Repeat the process for each hierarchical index level, in the correct descending order. If you make a mistake, press the Clear button and start over.
6. Review the index profile.
7. To save the index profile in a IXS file, choose Save Index Profile from the File menu. The system creates an index profile file in the applications directory. The base name of the new file is the base name of the report file, with an extension IXS. If the file already exists it is overwritten without warning.
8. To index, choose OK Create.

To remove a report file from the index

The index files are saved in the same directory as the print files. The extension name of the index specifications is XRD. To remove an index, use the Windows File Manager. If you re-index a report, the old index file is overwritten.

Basic Concept

E:report is a report **indexing, filing and retrieval** system. The indexed report files must be in a standard 'print file' format.

The system is ideally suited for computer generated management reports. These reports often consist of hierarchical groups, sections and sub-sections, such as divisions, departments, geographical areas, etc.

The indexing of reports is optional; indexing is only required if you want to create sub-indexes for (hierarchical) groups and sections of a report. Non-indexed reports can be retrieved and viewed equally fast. The print file base name must be unique within the directory.

The indexes are created by the system. The system only needs to know the first complete set of indexes, as a sample. The system then evaluates the context of the sample and locates and creates all indexes for the report (Indexing-by-Example). See [Index Specifications](#).

A word relating to headings and labels. Each group or sub-group in the report must have a heading. The heading must be positioned on its own line (or it must be the first text on the line). The heading has two parts: a) a static label and b) the variable heading information. The heading must be consistently positioned on the line. In the following examples of headings, 'Division:' and 'State:' are the static labels, 'Mid West' and 'Wisconsin' are the variable elements of the heading:

Division:	Mid West
State:	Wisconsin

The index files are saved in the same directory as the print files under the print file's base name, with the XRD extension. Only one index file can exist per base name in a directory, therefore, all print files with a common base name use the same index. The index file has a 'System' file attribute and may not be visible in the file directory.

The reports can be retrieved and viewed on the screen, or they can be printed. Sections of reports can be copied and pasted (via Clipboard) to virtually any Windows application, such as spreadsheets or word processors. The system can convert raw print text into tab-separated columnar formatted text.

The system also features a word search function.

See [View and Print a Report, Copy to Clipboard, Search](#)

E:report includes a limited password security system. The access to sections of reports is controlled by the hierarchical structure. Therefore, a person authorized to view a particular level of report data can view all the subordinated levels as well. See [Security and Passwords](#)

Limitations

There is a limit of nine (9) hierarchical index levels.

The first occurrence of each class of indexed heading must be within the top 30 lines of the report.

Only one index can exist on a printed line. The index heading should be on its own line, and there must be no variable report data to the left of the index heading label.

The base name of the print file must be unique within the directory, regardless of the extension name.

The search function is limited to 32,000 lines of text at one time.

Exit

To exit system

From the File menu, choose Exit System.

View and Print a Report, Copy to Clipboard, Search

Reports can be viewed, printed and copied to the Windows clipboard.

To view a report

1. In the File Selection window, specify the directory (double click) and select the file name (double click). If the report has an index, the outline is shown in the List of Reports below. If no index exists, the text of the report is displayed in the Report window.
2. In the Report Outline, click the report name (topic). If the item has a plus sign (+), the report consists of indexed sub-sections. To see the sections, click the plus sign. The outline expands and shows the next level of indexed sections and the plus sign changes to a minus (-) sign. If there are plus signs on the next hierarchical level, the section can be split into smaller sections, and so on. Select the section you want to view. To collapse the expanded list, click the minus sign.

Only the reports for which you have password clearance are listed.

Please note that a person with security clearance to a given hierarchical level, can also access the subordinate levels.

3. The (section of the) report is displayed in the window on your right.

If the report does not fit on the screen, a vertical scroll bar is added. Use the scroll bar to move forward and backward. The arrows at the top and bottom of the scroll bar move the visible text by one line. The scroll box (also called thumb) between the arrows moves the visible text 'non stop' to any screen page, including first page and last page. You may also use the PgUp, PgDn, Home and End keys

A horizontal scroll bar allows you to view extra wide reports. Click the shaft area of the horizontal scroll, or drag the report window. Double-click the report to reset the window to its home position. Alternatively, maximize the Report window by double-clicking the title bar of the Report window.

To change the size of the display font, choose the font point from the View menu.

Wide reports can also be split into two sections. A **split window** allows you to view two separate areas of the report. To split the report, choose Split Report from the View menu. You can scroll, re-size and slide the split section. To re-size the split section, simply drag the right hand border. To slide the split section, place the cursor inside the section and drag it horizontally. The split can be undone by choosing Split Report from the View menu.

To print a report, to copy to the clipboard

From the File menu, select Print Report. Select the printer (if required), specify the number of copies and press OK.

There are two methods of printing. The Print Report (Raw) prints the report file 'as is'. The

standard Print Report adds page breaks and page numbers when printing.

You may also copy selected text and paste it to the Windows clipboard. For the copy functions, choose the Copy menu.

There are two methods of copying text to the Clipboard. The Copy to Clipboard (As Is) copies the selected text unaltered. The Copy to Clipboard (Tab Format) converts standard print text into a tab-separated format suitable for spread sheets. See [Export to Clipboard](#)

To search for a word

You can search for a word, part of a word, or word combination. All searching is performed 'moving forward'. Only the text for which you have password clearance will be searched. Searching a very large file may take a considerable time. The search is limited to 32,000 lines of text.

1. Display the report.
2. Choose Search Forward from the Search menu.
3. In the prompt, enter the character pattern. The characters are case sensitive; upper case and lower case characters are not interchangeable. Wildcard characters are not permitted. Choose OK.

The system displays the first match of the pattern, starting from the highlighted text or from the top of the current screen.

4. To search for the next word match, choose Search Next from the Search menu (or press N + Ctrl).

Index Specifications

See also [Index a Report](#)

The indexing of reports is required only for hierarchical groups and sub-groups of the reports. Index specifications are shared by all print files with a common base name (in the same directory). Reports without indexes can be retrieved and viewed as a whole report.

Indexes can only be created if the following conditions are met:

- a) The report file has a hierarchical structure and the report groups have consistent headings. The group headings must be on separate lines (or must be the first text on the line) and they must include a static (constant) label and a variable label information element. For example, 'State:' is the static label and 'Texas' is the variable element. A consistent context of the heading is essential; the leading and trailing spacing of the static label, its placement relative to the left border, and its exact spelling must be applied uniformly throughout the report.
- b) Index Profiles are supplied to the system.

An index profiles must be specified for each type of report. On the displayed report, simply highlight the first heading label of each hierarchical level; the system then creates the index file for the whole report (Indexing-by-Example). The index profiles can be saved on disk and used as default index profiles for other reports with the same base name (across directories).

The index profile can also be embedded in the text of the report. If embedded, the profile text line must be placed **after** the reports' header and **before** the first index item. The embedded profile text must be prefixed with a *IXS* flag (see example of report below)

The index profile specifications are case sensitive. Leading, embedded and trailing spaces are significant.

Recommendations to minimize indexing errors

1. Report sub-headings should include a non alpha symbol, such as colon. This will make the indexes more unique and less susceptible to name conflicts.
2. When embedding the index specification in the report file, ensure that the specification is inserted after the report's heading.
3. Remember that the index is case sensitive. An upper-case 'A' is not matched against a lower-case 'a'. Also, spaces are significant.
4. Ensure that the report headings are consistent. They must be on separate lines (or they must be the first text on the line) and the heading must include a static label and a variable element.
5. Never change a report file after it has been indexed.

Example of a simplified report

XYZ Corporation
Sales Report
December 31, 1994

*IXS*Division:;State:;Sales Person:

Division: North East
State: New York
Sales Person: J Smith

.... report data

Sales Person: A Miller

.... report data

State: Pennsylvania
Sales Person: R Anderson

.... report data

Sales Person: D Cook

.... report data

Division: South East
State: Florida
Sales Person: J Hopps

.... report data

.

Security and Passwords

Please read the Manual for Systems Administrators.

Tutorial

This tutorial shows you how to create report indexes, retrieve and view the reports. The tutorial uses sample reports which are included in the software files.

It is suggested that you print out the text of this tutorial and follow the process step by step. To print out this tutorial, choose Print Topic from the Infothek Help system's File menu.

1. We will index only one report file (AASALES.SPL) This sales report is suitable for multi-level hierarchical indexing.
2. In the Directories list in the Indexing window, select the directory that holds the sample report files (the directory of the application, such as C:\EREPR1). Double-click the directory name. All files contained in the selected directory are displayed in the Files list. For our tutorial, we only want the sample files with the SPL extension name. In the Pattern field, type *.SPL. The Files list now displays three files (aasales.spl, balsheet.spl and income.spl).
3. Select the aasales.spl file.
4. Click the Create Index button, or choose Index Report from the File menu. The On-line Index Specification window is displayed, complete with an extract of the top section of the report.
5. In the report text below, highlight the word 'Division:' (including the colon). This is our first and top-tier index parameter. Press the Paste button. The index parameter is pasted to the Index Profile field above. Highlight the second index parameter, i.e. State: and press the Paste button. Repeat the process for the third index parameter, i.e. Sales Person:
6. Press the OK Create button. The system creates the indexes.
7. Back in the File Selection window, select the directory (double click) and select the AASALES.SPL file (double click) You will find it in the application's directory. An outline of the report file is displayed in the Report Outline list. Click the plus sign (+). The outline expands and discloses the next subordinated level of report sections.

In the Report Outline, click the description (topic) of the report; the respective (section of the) report is displayed in the window on your right. Click on the topic of another report line and view another report section.

To contract (collapse) the list, click the minus sign (-).

8. Now, let us view a non-indexed report. Specify the directory (if not already selected) and double-click the INCOME.SPL file. Because the report does not have sub-indexes, it is NOT listed in the Reports Outline below, but the text of the report is displayed in the Report window.
9. If the report does not fit on the screen, a vertical scroll bar is added. Use the scroll bar to scroll forward and backward. The arrows at the top and bottom of the scroll bar move the visible text by one line. The scroll box (also called thumb) between the arrows moves the visible text to any chosen location, including the first page and last page. You may also use the PgUp, PgDn, Home and End keys.

A horizontal scroll bar allows you to view extra wide reports. Click the shaft area of the

horizontal scroll, or drag the report window. Double-click the report to reset the window to its home position. Alternatively, maximize the Report window by double-clicking the title bar of the Report window.

10. Wide reports can be split. This allows you to view the stationary left side of the report with selected other parts of the report. The stationary left side can be moved and scrolled. To split the report, choose Split Report from the View menu.
11. To copy a section of the report to the clipboard (so that you can use it in other Windows applications, such as spreadsheets or word processors), select some rows with your mouse. Then, from the Copy menu, choose Copy to Clipboard (As Is) or Copy to Clipboard (Tab Format). The first option copies the text 'as is', the second option converts the text to a tab-separated columnar format for spreadsheets.
12. To print a complete report or highlighted selections, choose Print Report from the File menu. When printing a section only, ensure that you highlight the section first.
13. To create a new file for the selected report (or section of report), choose Save As from the File menu. Specify the file name and choose OK.
14. To exit the system, choose Exit System from the File menu.

Export to Clipboard

Sections of the report can be exported to the Clipboard. From the Clipboard, the data can then be pasted to spreadsheets and other Windows applications. The export program can convert the text of most reports into a 'tab-separated' format. Only the text appearing on the screen can be selected for export (no scrolling).

To export data to the Clipboard

1. On the Report in the Reports window, highlight the rows that you want to export. Always select complete rows.
2. From the Copy menu, choose Copy to Clipboard (As Is) or Copy to Clipboard (Tab Format).
3. Activate your recipient spreadsheet or other Windows application.
4. From the Edit menu of your spreadsheet or other Windows application, select Paste.
5. Review the data.

Data Compression

The print files can be compressed. Although the compression algorithm is not optimized, the file size can be reduced significantly with file compression. The compression program must be run before the reports are indexed.

To compress a file

1. Select the file.
2. From the File menu, choose Compress/Decompress File | Compress File. The Save As dialog box appears.
3. Specify the new file name of the compressed file (you must not use the original file name). The system does NOT require a specific extension name for compressed files.
4. Choose OK.

To decompress a file

The decompression of a file is performed by the system whenever data is displayed or printed. To decompress a file, you may also use the Decompress function in the Compress/Decompress menu.

Compression algorithm

Only spaces are compressed. The contiguous number of spaces must be 4 or more. The compressed space is replaced by a caret symbol (^) followed by a numeral indicating the number of spaces. For 4 to 39 spaces, the numeral immediately follows the caret symbol (without a space). For more than 39 spaces, a space is inserted before and after the numeral. Examples: `ZZZ^8ZZZ` = 8 spaces between the letters `ZZZ`; `ZZZ^32ZZZ` = 32 spaces; `ZZZ^ 123 ZZZ` = 123 spaces (notice the space before and after the 123).

Indexing Considerations

When indexing a compressed report, always include the caret and the numeral as part of the heading label.

