

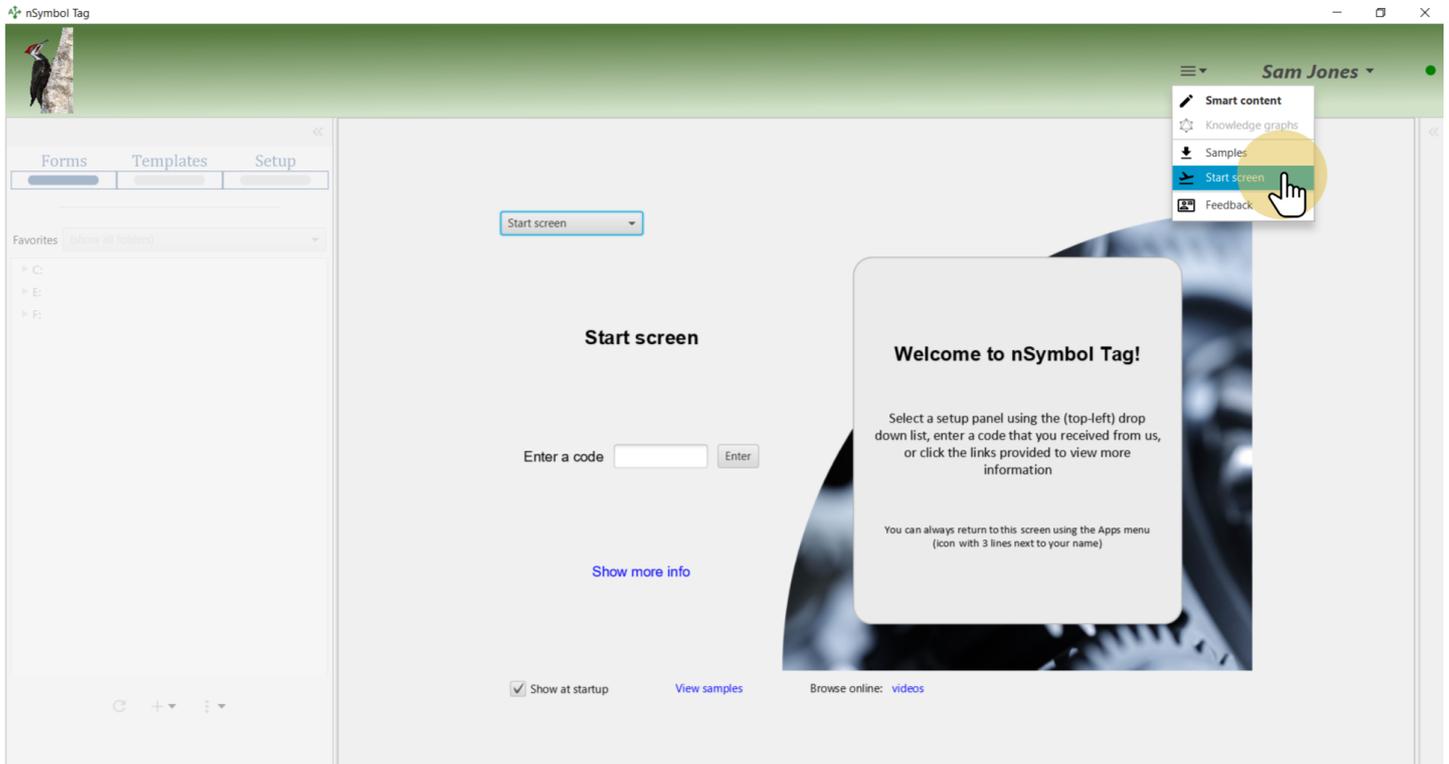
# Basic Report

This guide shows how to use the Basic report setup panel.



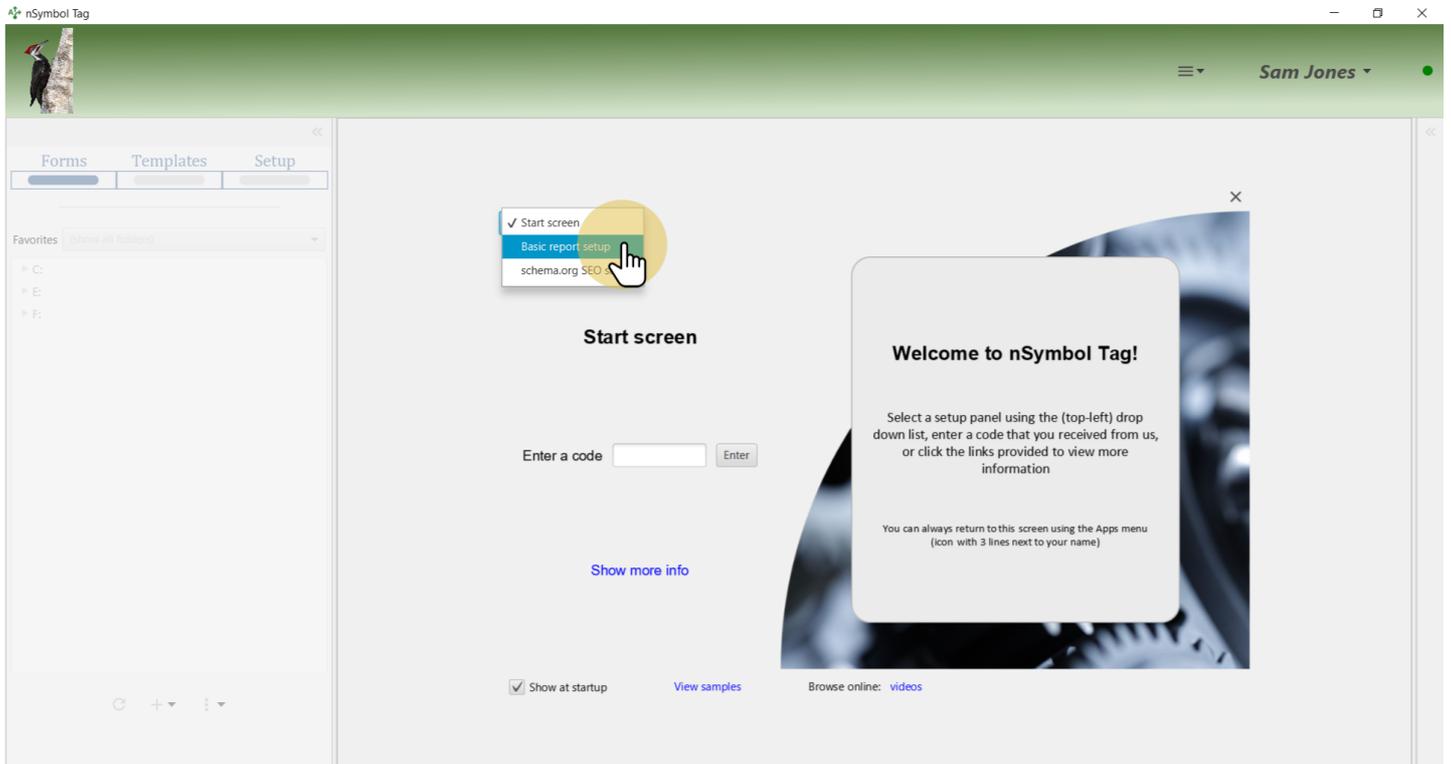
# 1 Show Start screen

After installation the *Start screen* will automatically display. If it gets closed, you can always open it again using the *Apps menu*.



## 2 Show Basic report setup panel

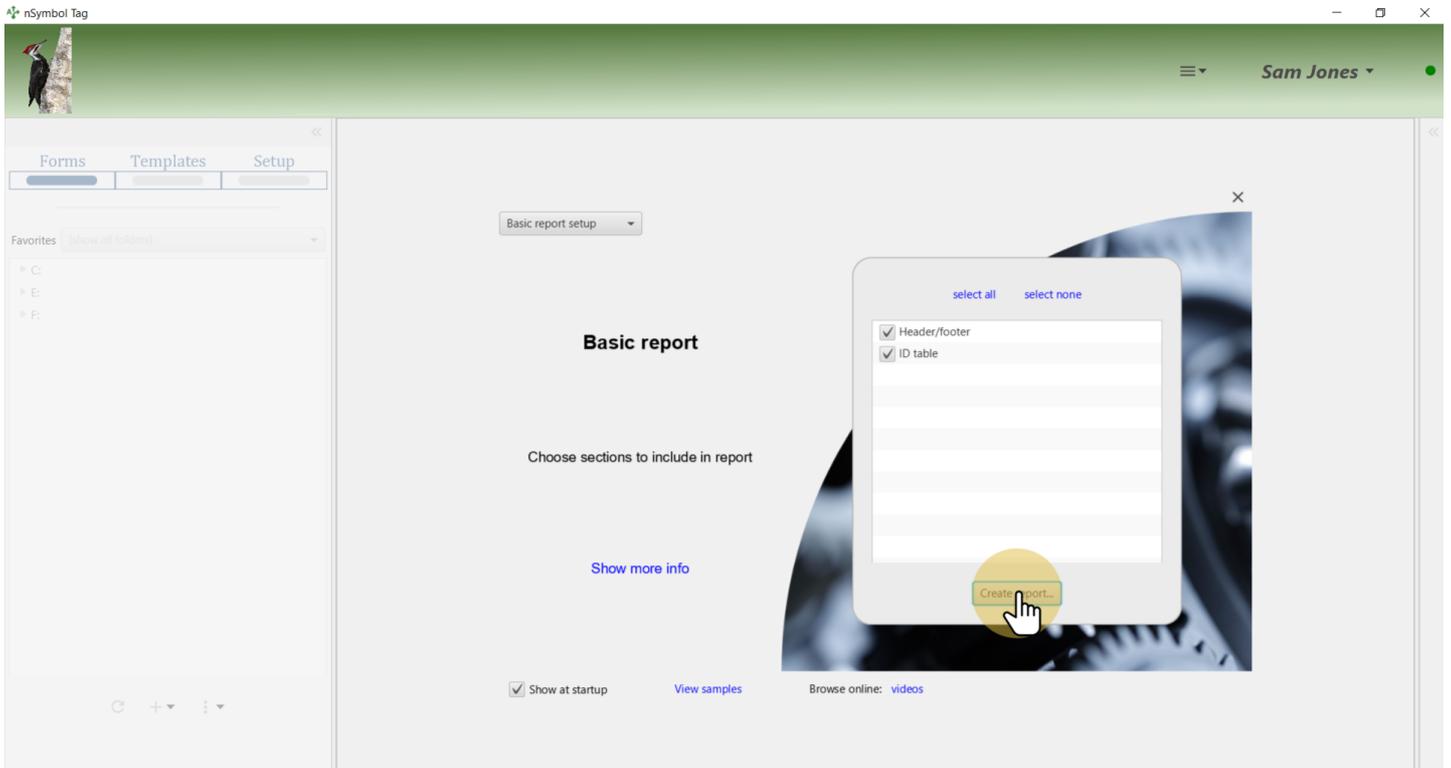
The *Start* screen lets you open all available setup panels. For this guide, select the *Basic report setup* panel.





### 3 Start creating a new report

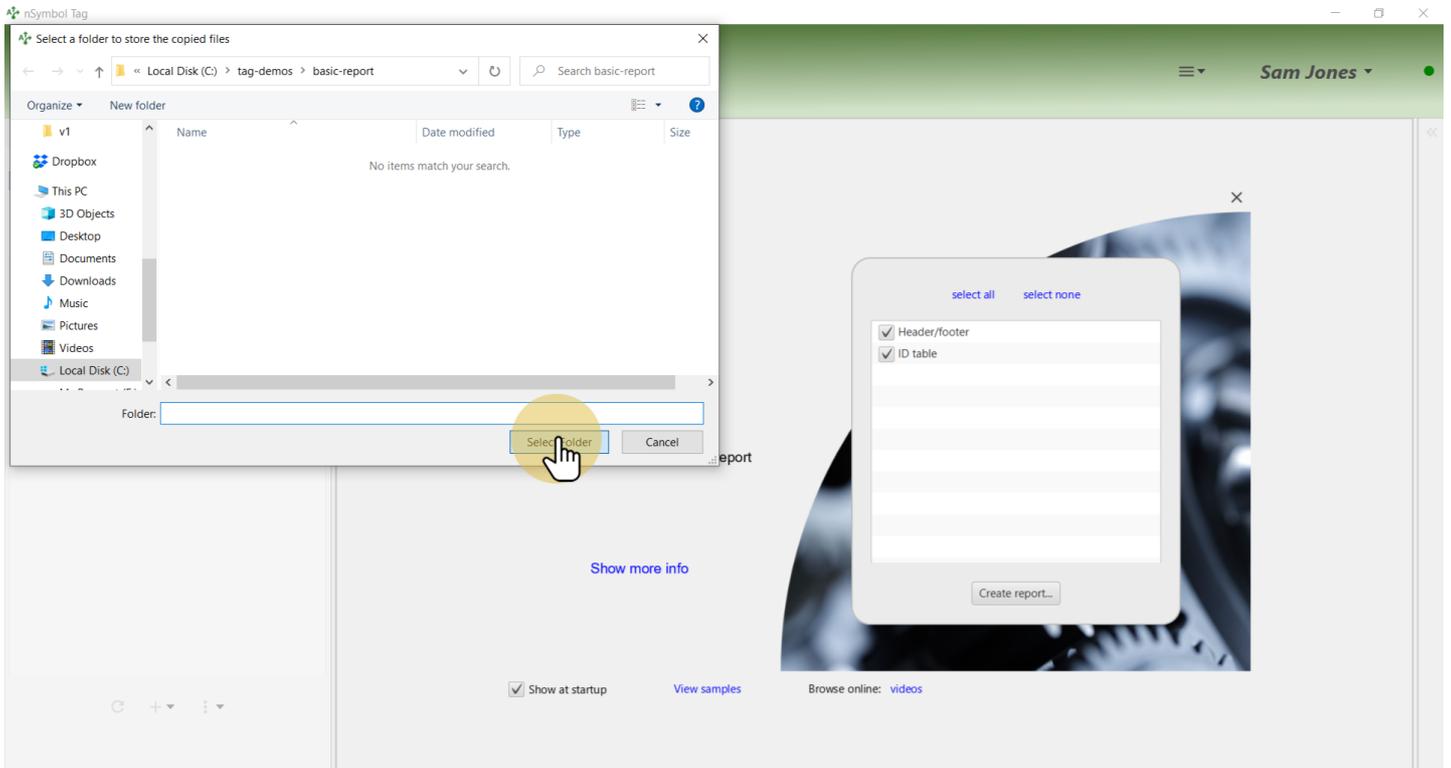
The *Create report* button will prompt you to select a folder to store all files required by the report.





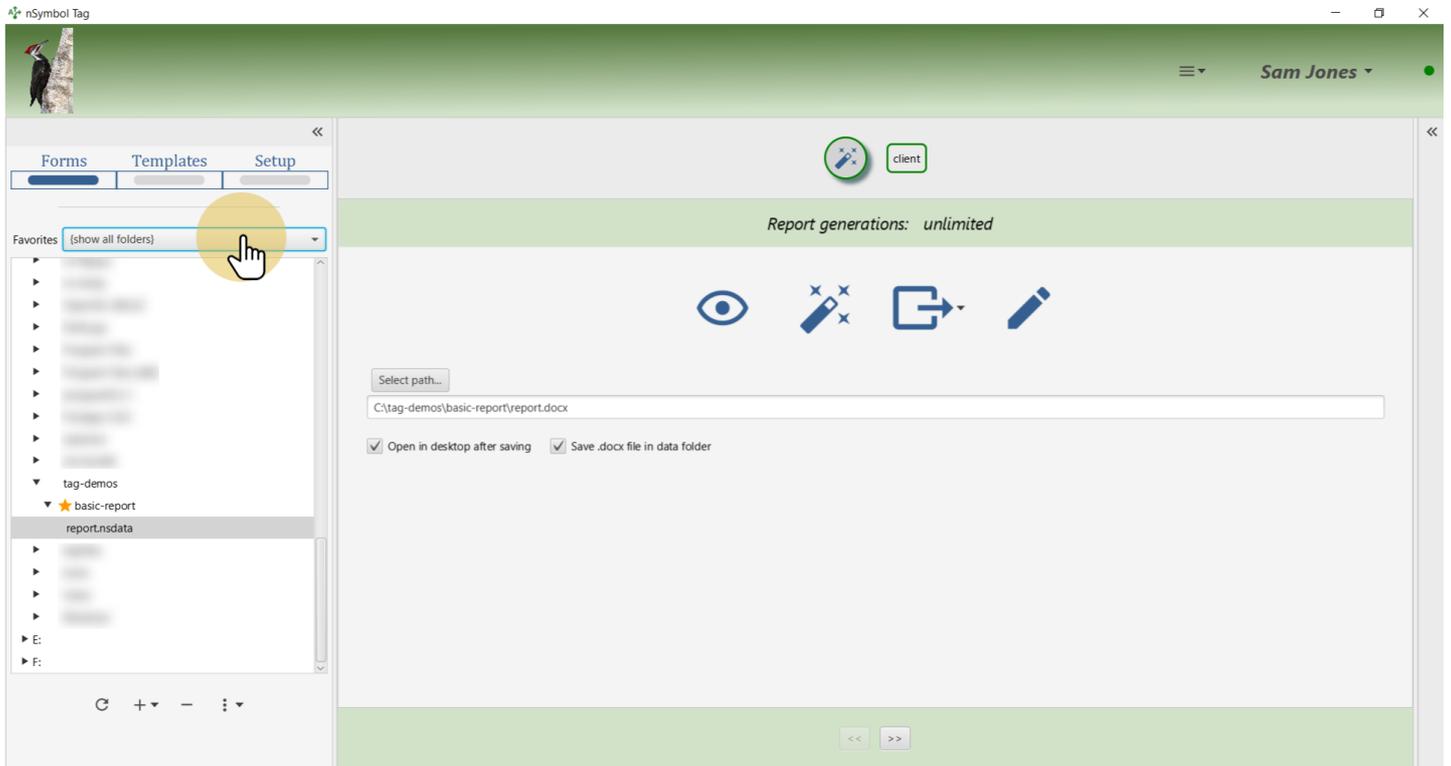
## 4 Select a folder

Select a folder using the standard Windows or Mac file selection dialog.



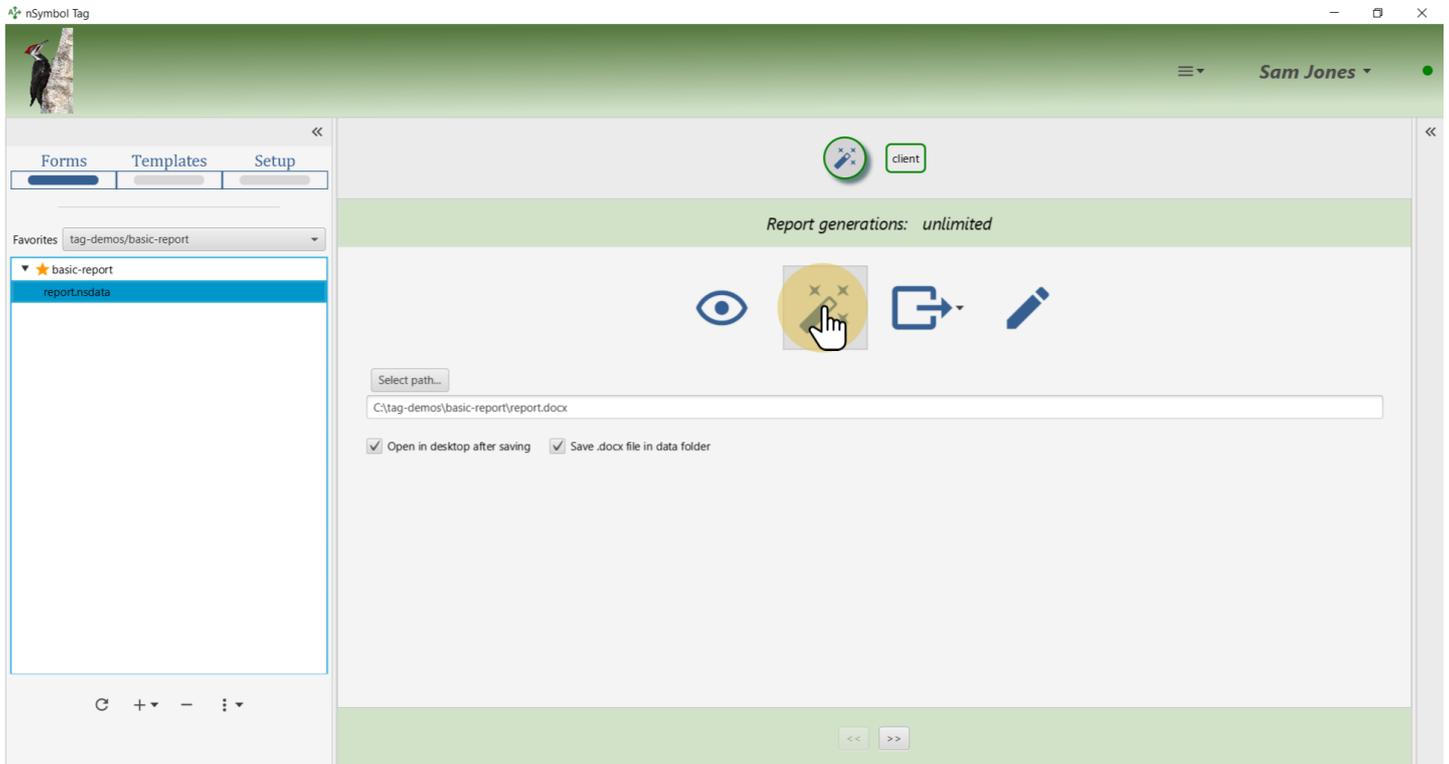
## 5 Select a favorite folder

When the report is created, the folder you selected is also marked as a favorite if possible. Select this folder in the *Favorites dropdown* list to reduce screen clutter.



## 6 Generate a \*.docx file

Select the report.nsdata file and click the *magic wand tool*. This saves a report.docx file in the same folder and opens it using your desktop's default word processor.





## 7 View draft in word processor

The report looks like this. Next you will make some changes and re-generate a slightly different version of this word processing document (report.docx).

your logo could go here

### Report Title

Client Name:	Stevie Nicks	Account:	123456
Address by first name:	false	Report date:	May 11, 2021

### Shared templates

See how the following sentence changes when you update values on the Forms screen and click the magic wand to generate:

**Ms. Nicks requested her invoice, and she would like a copy sent to human resources.**

The Client template will generate first name, or Mr/Ms last name.

You can call templates into your report using the call-template tool on the Logic toolbar. You can also open the Find/replace dialog and select the Use templates checkbox - this lets you find "she" and other terms in text and replace them with the appropriate call-template.

To use terminology that makes sense for your needs, simply rename fields on the Setup screen. For bigger changes create a new data setup file in the Setup screen, return to your report in the Templates screen, and import the custom data setup file using the File options / Import content... menu item.

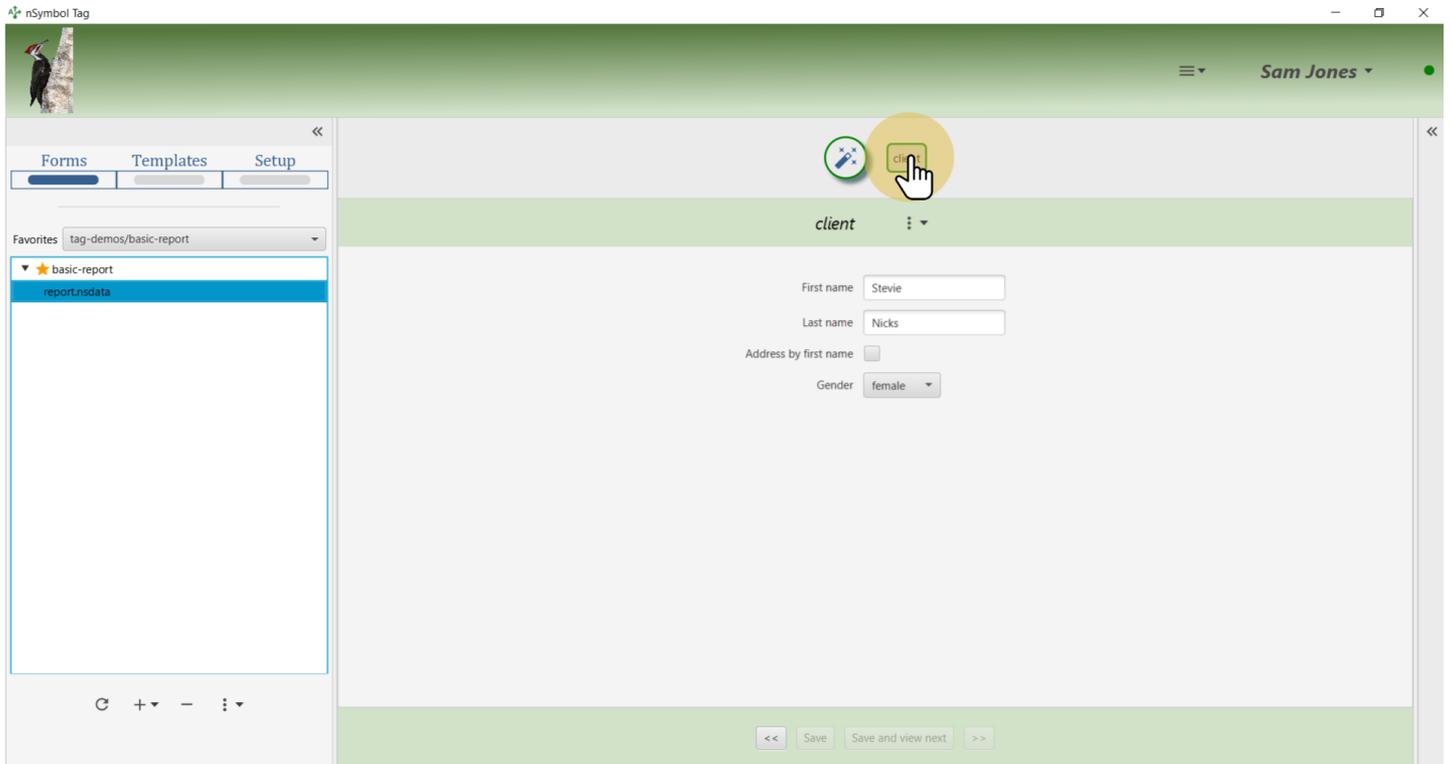
### Headers and footers

If the optional Header/footer section was included, you should see a header on the first page but no footer. If you add enough content to create two pages or more (e.g., hit the Enter key several times), you will find a different header and footer for all remaining pages where the header contains dynamic content and page numbers.



## 8 Edit client data

Click on the *client form tab* to review and edit client data.





## 9 Change any data field

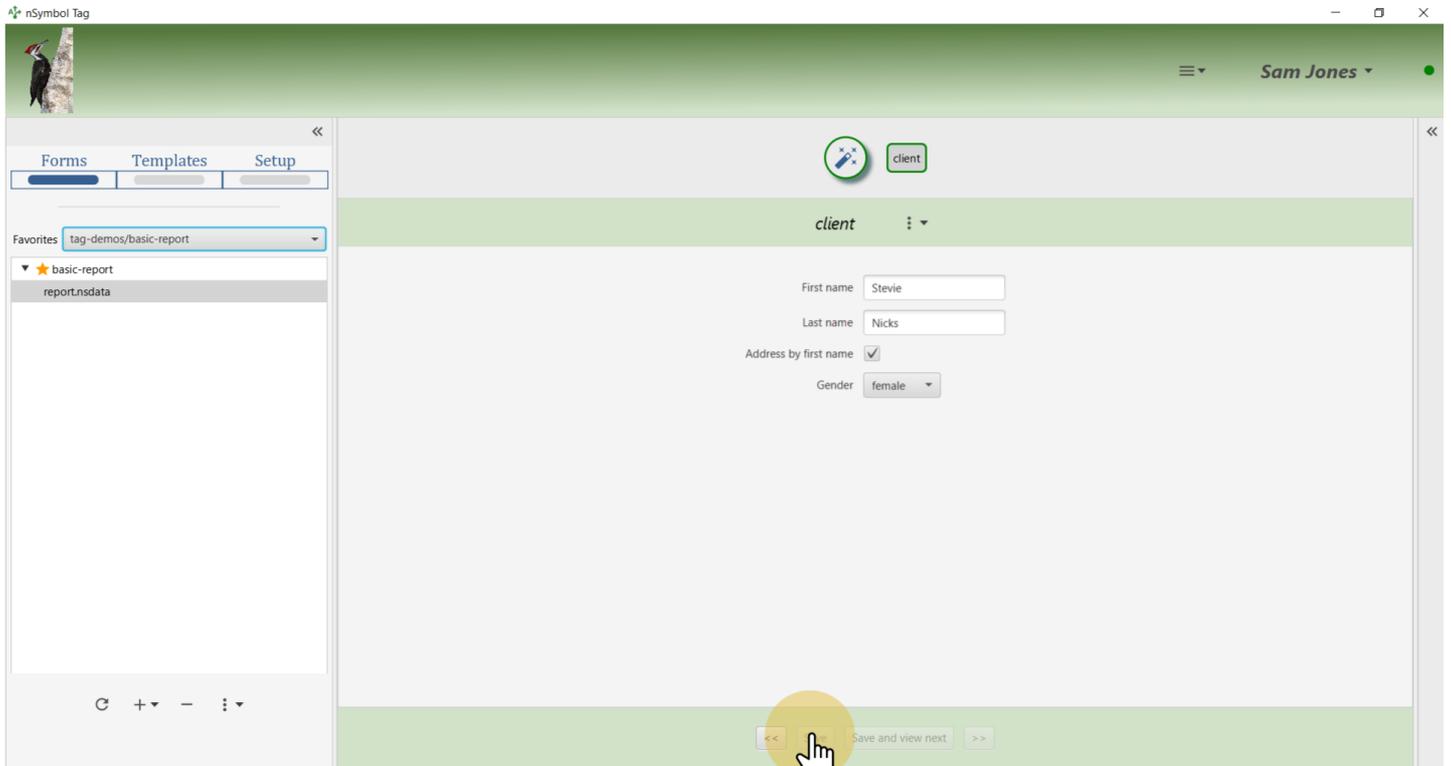
Change one or more data fields to see how it will change report content.

The screenshot shows the nSymbol Tag software interface. On the left, there is a sidebar with a 'Favorites' section containing 'tag-demos/basic-report' and a tree view under 'basic-report' with 'report.nsdata'. The main area displays a form for editing a 'client' record. The form includes fields for 'First name' (Stevie), 'Last name' (Nicks), 'Address by first name' (with a dropdown arrow), and 'Gender' (with a dropdown arrow). A yellow circle highlights the 'Address by first name' field with a hand cursor. At the top right of the main area, there is a 'client' label and a menu icon. At the bottom of the main area, there are navigation buttons: '<<', 'Save', 'Save and view next', and '>>'. The top of the window shows the 'nSymbol Tag' title bar, a user profile for 'Sam Jones', and window control icons.



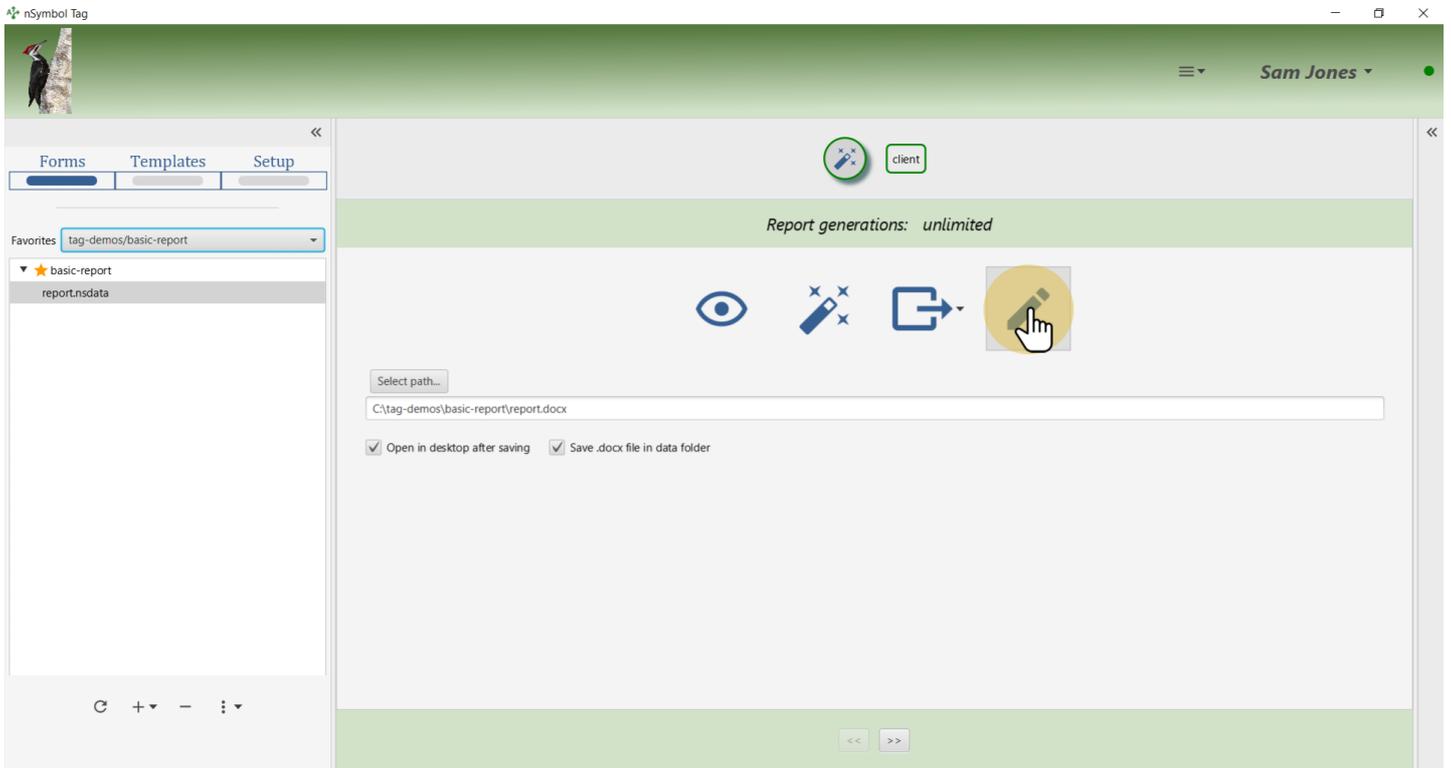
## 10 Save form changes

Save any changes made in the form so they can be picked up during generation.



# 11 Open the Templates screen

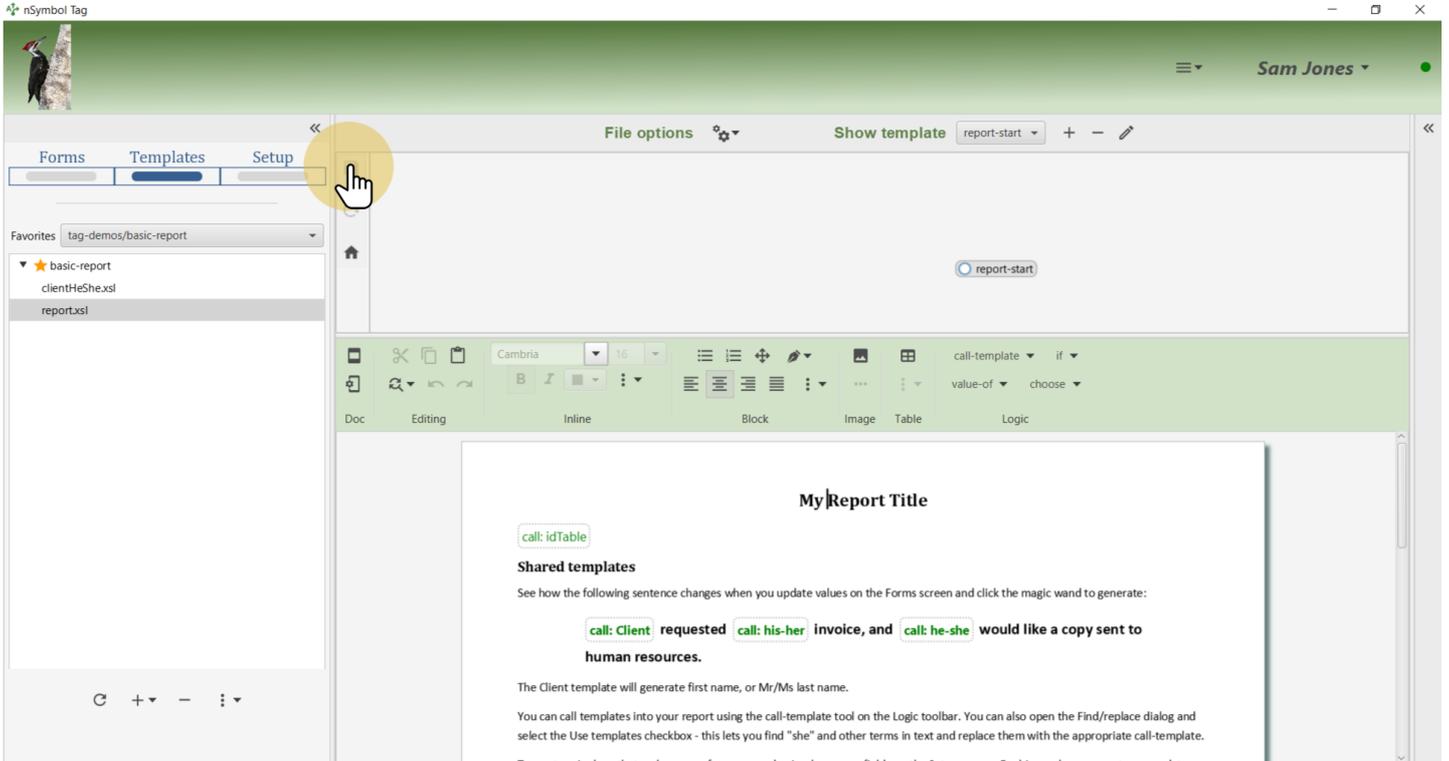
Click on the *pencil tool* to open the *Templates* screen where content and logic can be changed.





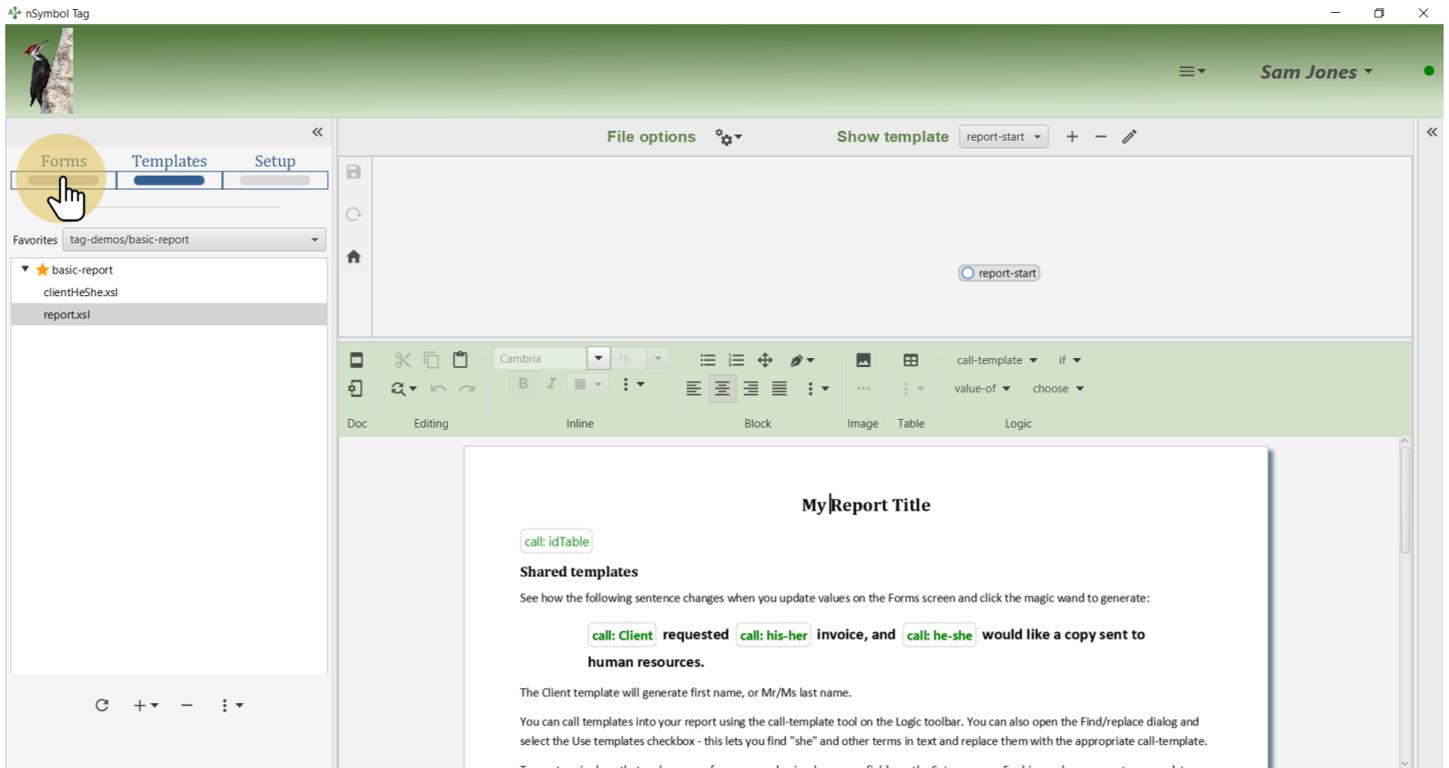
## 12 Edit content

Make one or more changes to the displayed report content and click the save *tool*. In this example, the title was changed to "My Report Title".



## 13 Return to Forms screen

Clicking on the *Forms* screen tab will take you back to current data and the *generate* page.

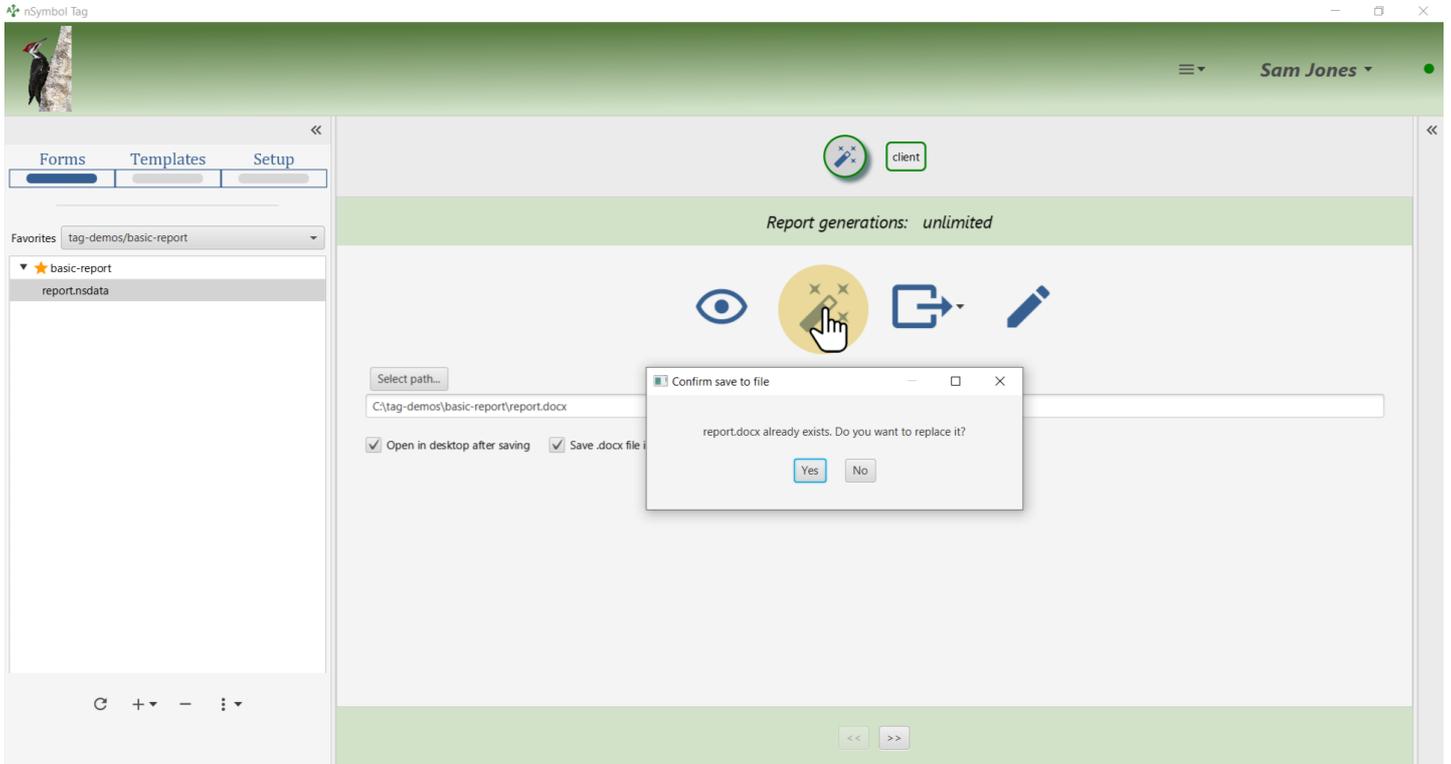


The screenshot displays the nSymbol Tag software interface. The top navigation bar includes a user profile for 'Sam Jones' and a menu icon. The main interface is divided into several sections:

- Left Panel:** Contains a navigation menu with tabs for 'Forms', 'Templates', and 'Setup'. The 'Forms' tab is highlighted with a hand cursor. Below the tabs is a 'Favorites' section showing a folder named 'tag-demos/basic-report' containing files like 'basic-report', 'clientHeShe.xml', and 'report.xml'.
- Top Bar:** Features 'File options' and 'Show template' (set to 'report-start').
- Right Panel:** Displays a 'report-start' button.
- Bottom Panel:** Shows a rich text editor with a toolbar. The toolbar includes options for font (Cambria, size 16), bold, italic, text color, background color, bulleted list, numbered list, link, unlink, image, table, and logic. The logic dropdown is expanded, showing 'call-template', 'if', 'value-of', and 'choose'.
- Main Content Area:** Displays a report preview titled 'My Report Title'. The report content includes a call template 'call: idTable', a section for 'Shared templates', and a paragraph explaining how to use call templates in reports.

## 14 Generate a new draft

Clicking on the *magic wand tool* will now prompt to confirm that you want to replace the existing copy of report.docx (click Yes).





## 15 View updated draft

Notice that the client is now referred to using her first name instead of Ms. Nicks. The report title has also changed as expected.

your logo could go here

### My Report Title

Client Name:	Stevie Nicks	Account:	123456
Address by first name:	true	Report date:	May 11, 2021

#### Shared templates

See how the following sentence changes when you update values on the Forms screen and click the magic wand to generate:

**Stevie requested her invoice, and she would like a copy sent to human resources.**

The Client template will generate first name, or Mr/Ms last name.

You can call templates into your report using the call-template tool on the Logic toolbar. You can also open the Find/replace dialog and select the Use templates checkbox - this lets you find "she" and other terms in text and replace them with the appropriate call-template.

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## 16 All done

That's it for this guide. You can revisit the above steps to see how other data or content changes will affect the final draft.

Note that it is considered best practice to rename the final generated draft document before manual editing begins. That prevents any mistaken clicks from overwriting your file and losing all manual edits.

