

Ad-hoc reporting and mail merge for IBM Lotus Notes® and Symphony® users

Integra Quick Reports allows end-users to generate ad-hoc reports from Lotus Notes to Lotus Symphony.

Consisting of an easy to use 4 step wizard, Integra Quick Reports allows end users to:

1. Determine the data content of their report
2. Determine the sort order of data and use of grouping and sub-totaling, data pilots (pivot tables) and charts
3. Filter data according to user defined conditions
4. Determine output options such as e-mailing, converting to PDF

The simple 4 step wizard allows end-users with very limited knowledge of Lotus Notes to generate a quick report without having to resort to the assistance of a Notes Developer.

The user is able to work with the data, generating graphical reports, data pilots (pivot tables), mail merge using Symphony.

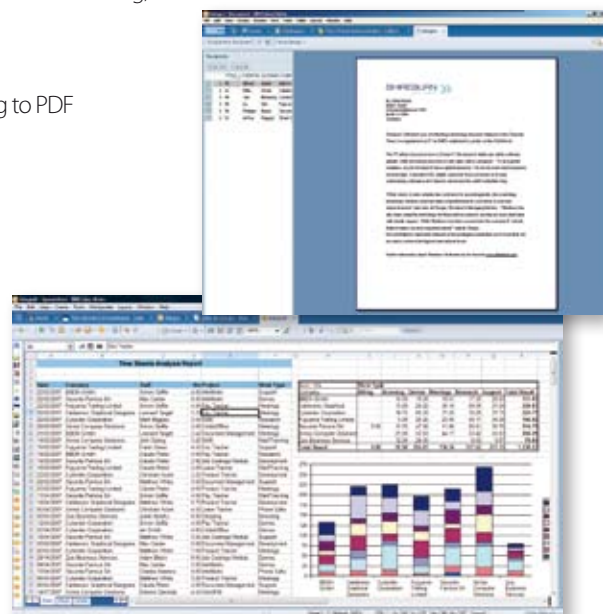
Integra Quick Reports provides the ability to delegate simple reporting tasks out to end-users and reduces the time and effort of developers to support corporate reporting.

Launch Integra Quick Reports through a Smarticon or action button from any Notes view using a Notes client or web browser.

1 Field Selection

On launching Quick Reports, the Field Selection step of the wizard displays the column contents of the current Notes view allowing the user to point & click to select columns for reporting. Users can set the Symphony column position that the data appears in through the wizard. Additional fields not displayed in the current view but stored in the Notes document are able to be selected easily by the user clicking on the 'More Fields' button.

Allows the creation of field maps, listing only fields needed to be exposed to end-users, giving easily recognisable field names. Data in other views and databases can easily be selected for inclusion in the report using the lookup wizard enabling reporting from multiple views and databases.



2 Sorting and Grouping

Setting the sort order of data for presentation in Symphony saves more time and effort for the end-user. This can be achieved using simple drop-down menus and check boxes ensuring no end-user training is required. Data can also be grouped to provide "Notes-like" categorization and sub-totalling, averages etc. per group allowing their usage to be triggered simply through Integra Quick Reports.

Users can simply click on a check box to analyse data in a Symphony Data Pilot (pivot) and to display the data graphically.

An Integra Quick Report generating mail merge to Lotus Symphony allows the definition of the document layout.



3 Data Filtering

Step 3 of the Quick Reports wizard allows the user to set filtering conditions using a simple "rules-like" interface. This will filter the Notes data and only export the data meeting the conditions set. For instance, Integra Quick Reports enables users to set date ranges for their reports or to generate sales data for just a particular region.

Combine multiple conditions using the AND and OR statements. Stored filters allow prepared filters to be selected by end-users and thus to apply filtering conditions to the data. Stored filters allow the complexity of complex selection criteria to be hidden away from the end-user.



4 Output Options

The 4th and final step of the Integra Quick Reports wizard allows the user to set various report output options including:

- Setting a report title (Spreadsheets only)
- Sending by e-mail as an ODF or PDF file (Spreadsheets only)
- Saving the document for future reuse, optionally sharing it with other users.



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Installation

Integra Quick Reports does not require the installation of any EXE's or DLL's on user workstations nor modifications to any Notes databases. Only the deployment of a Notes SmartIcon to the desktop is required, a task which is itself automated.

Licensing

Integra Quick Reports is licensed per user.

Requirements

Integra Quick Reports requires the use of a Windows based Lotus Notes client 8.0+

Support / Maintenance

An annual maintenance and support agreement is available covering e-Support and all product upgrades.