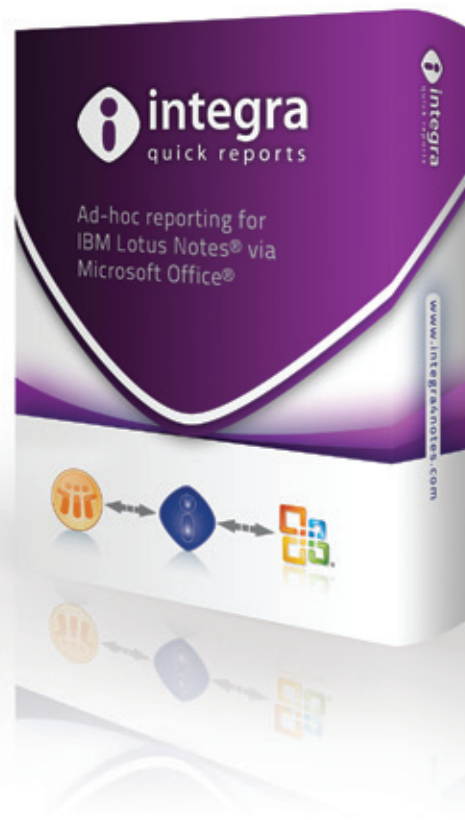




# integra for notes

## Reporting and Microsoft Office® Integration for IBM Lotus Notes®



[www.integra4notes.com](http://www.integra4notes.com)

# The Problem & The Solution

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## Problem

Developers and end-users of IBM Lotus Notes® are constantly seeking a solution to improve the presentation and analysis of their Lotus Notes data.

Being able to push data to and from Microsoft Office®, as the tool of choice for the desktop, empowers users with all the capabilities of these tools such as analysis, charting, printing, pivot tables, mail merge etc.

While a simple requirement often exists to push the contents of a few fields in a Notes document into a pre-formatted Microsoft Office document, more challenging needs revolve around picking fields from multiple IBM Lotus Notes documents, combining them with data from other databases and accessing data from response documents.

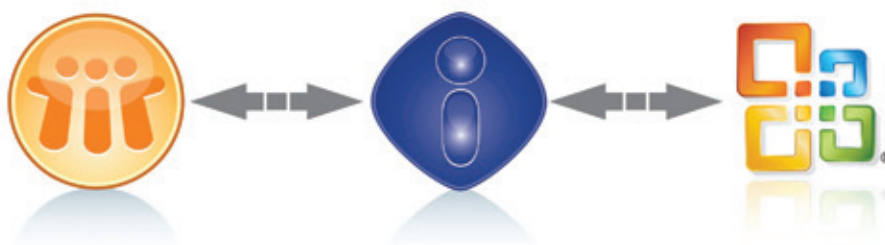
In addition, data already held in Word and Excel is often required to be imported into Lotus Notes databases in a seamless manner.

## Solution

Integra for Notes® and Integra Quick Reports® improve the capabilities for data analysis, reporting, graphing, pivot tables and mail merge letters and labels from your Lotus Notes data by integrating Lotus Notes with Microsoft Excel and Word as well as PDF and XML files.

Integra supports the reporting and data analysis function of a Lotus Notes application without the need to deploy any new software or make changes to your Lotus Notes applications.

While Integra for Notes is used to create and run predefined reports with specific data content and layout, Integra Quick Reports is used by end-users to define and run their own ad-hoc reports and mail merges to Excel and Word using a simple 4 step wizard.





# Usage Scenarios

**Sales Reports** – generate sales data from your Lotus Notes data to an Excel spreadsheet to allow in-depth assessment of this information using charts, filters and pivot tables. Allow the end-user to be presented with a dialog box to make their reporting choices by region, between dates etc.

**Quotations** – generate an Excel quotation to a client listed in your Notes CRM database by selecting the client and running Integra. Fill in the Excel quotation and allow Integra to convert it to a PDF file and e-mail the quotation and also to attach it to a Notes document linked to the client in the CRM database.

**Migrate Lotus Notes data** – migrate your Notes databases by exporting each Notes document to Word and programmatically detaching any attachments to the file system. Embed the attachments or hyperlink them to the Word document.

**Pixel-Perfect Printing** – use Integra to accurately position Notes data onto prescribed forms and layouts for printing of complex documents and PDF file creation with pixel-perfect precision.

**Help Desk** – analyze open help desk tickets in a spreadsheet, chart and analyze their status and distribute to responsible managers.

**Mail Merge** – merge contact details from a Lotus Notes database into a printed or e-mailed mail shot in Word.

**Labels** – generate label formats using Word taking data from your Lotus Notes databases.

**Import Word documents** – upload Word documents from your file system to a Lotus Notes document library or quality system.

**Upload Production Data** – automate daily uploading of data from your production systems into a Lotus Notes database for distribution of reports using a scheduled Integra profile.

**Scheduled Reporting** – generate a scheduled weekly report of sales by region into an Excel spreadsheet and distribute to the responsible regional sales managers.

**Domino Administration** – generate an Excel analysis of mail file settings on your Domino server with usage history, sizes, ACL's and receive a weekly scheduled report.





# Reporting and Microsoft Office® Integration for IBM Lotus Notes®

Integra for Notes allows the definition and running of reports or mail merges from any IBM Lotus Notes database with the output being routed to Microsoft Excel® or Microsoft Word®.

Integra for Notes allows the creation of an Integra profile in the Integra NSF linked to a particular Notes database which defines the data content, layout and distribution of a specific report. No agents or other design changes are required in the Lotus Notes database.

End-users are able to run these profiles from within the Lotus Notes application itself resulting in the predefined report being created in Excel, Word, PDF or XML format. Reports can be run on-demand, using a Lotus Notes client, web browser, or on a scheduled basis and automatically e-mailed, saved back to Notes or the file system or simply printed.

Integra4Notes allows the integration of Microsoft Office into the Notes based business process. Integra replaces the need for in-application development of Office integration providing order of magnitude improvements in developer productivity and reducing invasive design changes and version control of Lotus Notes applications.

While a simple requirement often exists to push the content of a few fields in a Notes document into a predefined Office document, more challenging needs revolve around picking fields from multiple Notes views, accessing data from response documents and combining them with information from multiple databases and sources such as SQL, DB2, Oracle, etc.

Integra allows the use of standard Lotus Notes formula language and LotusScript reducing the need to relearn techniques. Through its **event-driven model**, Integra provides the greatest depth and breadth of data access, computation and reporting of any solution within the industry. Integra for Notes profiles can also be used to import data from Word or Excel into a Lotus Notes database.

## Features and Benefits

- Productivity: Massively reduce development time for creating high quality output.
- Seamlessly exports Lotus Notes data to Word, Excel, PDF and XML
- Improves presentation of Lotus Notes data
- Enables dynamic analysis of Lotus Notes data using Excel's numerous features
- Supports automated Excel charting, pivot tables, filters, macros etc
- Enables output of Lotus Notes Rich-Text data to Microsoft Word output
- Enables mail merging & labels to Word
- Integra's event-driven programming model allows the greatest depth and breadth of data access and computation of any Notes reporting solution
- Allows usage of LotusScript and Notes formula language without need for agents
- Supports Notes response hierarchies, multi-value fields, sub-forms etc
- Allows collection of data from multiple views, databases and servers as well as back-end databases such as Oracle, SAP, MS-SQL, DB2 etc
- Enables distribution of reports via e-mail, storage to the file system or as attachments in a Notes document
- Supports usage via Lotus Notes client, web browser as well as scheduled operations
- Controls printing of Notes data with greater accuracy and dependability
- Can also be used to import Word & Excel data into Lotus Notes

## Things you should know about Integra

### Zero footprint

All the functionality required by Integra is available within the Lotus Notes Integra database and no EXE's or DLL's are required to be installed on user workstations. No visits to client workstations are required for installation of Integra.

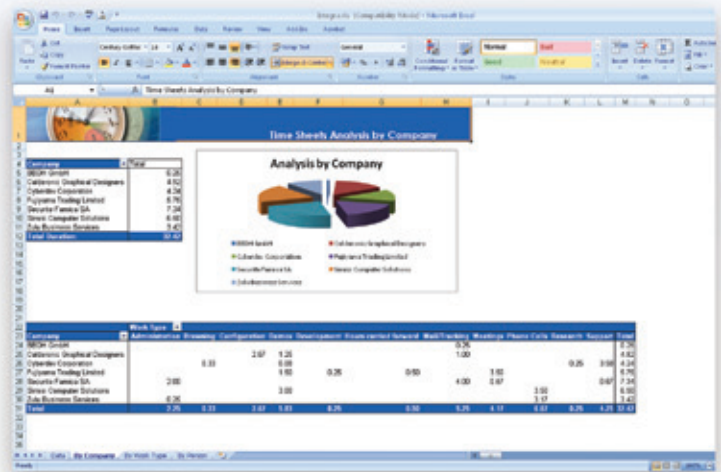
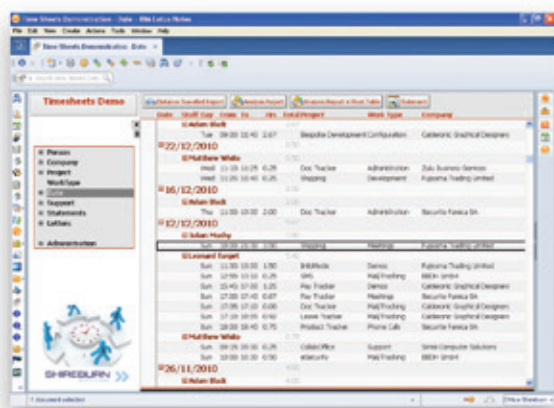
### Non-invasive

No design changes are required to be made to the Notes databases whose data is being accessed, eliminating regression testing and security concerns.

### Security

Respects all Lotus Notes security. Users only report on data available to them according to their ACL settings.



[illegible]

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

# Ad-hoc Reporting for IBM Lotus Notes® end users

Integra Quick Reports® allows end-users to generate ad-hoc reports and mail merges from IBM Lotus Notes® to Microsoft Word® and Excel®.

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

1. Determine the data content of their report/mail merge
2. Determine the sort order of data and use of grouping and sub-totaling, pivots 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 Lotus Notes Developer.

The user is able to work with the data, generating mail merges, labels, graphs, pivot tables, macros and all other standard features of these powerful desktop tools.

Integra Quick Reports provides the ability to delegate simple reporting tasks out to the end-user 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 Lotus Notes client or web browser.

## STEP 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 Excel 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. Field Maps allow the complexity of field design to be hidden from the user. 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.



## 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. 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 7.0+ as well as Microsoft Office 2003 or later.

## Support / Maintenance

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



## STEP 2: Sorting and Grouping

Setting the sort order of data for presentation in Excel 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. Three levels of sorting are supported.

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 an Excel pivot table and to generate a chart in Excel.

An Integra Quick Report generating mail merge or label output to Microsoft Word allows the definition of the Word template layout.



## STEP 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 easily apply filtering conditions to the data. Stored filters allow the complexity of complex selection criteria to be hidden away from the end-user.



## STEP 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
- Sending by e-mail as an Excel or PDF file (Integra PDF Writer license included)
- Saving the report definition for future reuse, optionally sharing it with other users





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Reporting and Microsoft Office®  
Integration for IBM Lotus Notes®



Integra for Notes

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