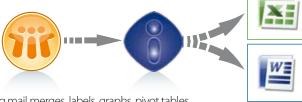# integra
quick reports

Ad-hoc reporting for Lotus Notes® end users

Integra Quick Reports allows end-users to generate ad-hoc reports and mail merges from Lotus Notes to Microsft 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 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-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.
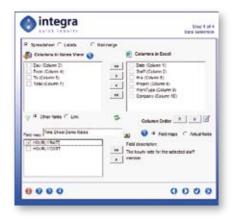
① Field Selection

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 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. This exposes predefined virtual field maps to display easily recognisable field names and reduce the complexity of the field structure of the databases.

This ensures the simple selection of data in other views and databases 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 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-totaling, 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.

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.

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 document for future reuse, optionally sharing it with other users.

 IBM Business Partner

 integra quick reports

Lotus ADVISOR AWARD EDITORS' CHOICE 2007
Lotus ADVISOR AWARD EDITORS' CHOICE 2006
Lotus ADVISOR SILVER EDITORS' CHOICE 2005

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 6.0+ as well as Microsoft Office 2000 or later.

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