



Lotus Notes and Crystal Reports

How is reporting presently being done from our Lotus Notes environment?

1. Views are constructed within a Lotus Notes application.
2. Exports of data from an existing application are then placed in Excel or Access for finished reporting.

An example of how Lotus Notes reporting is being done without Crystal Reporting...

1. Data is exported by a VB macro to an Excel spreadsheet.
2. Data is cleansed and reviewed to determine what portions belongs in the final exhibits.
3. Data then has additional calculations included. It is then sorted and categorized into various Excel exhibits.

An example of how Lotus Notes reporting can be done with Crystal Reporting...

1. An existing or new view is used/created in Lotus Notes to support the report(s).
2. The view can filter out unwanted data and provide validation of data going to the report.
3. The view sits in the Lotus Notes application.

An example of how Lotus Notes reporting can be done with Crystal Reporting ... continues

4. Crystal Reporting connects to the Lotus Notes database.
5. A standard report format is defined with standard control breaks. For example by year, by quarter and by month.
6. Since the bulk of the filtering and validation of data is handle in the Lotus Notes view, the report is kept simple.

Demonstration

Benefits of the Lotus Notes and Crystal Reports Partnership

1. A savings of 1 or 2 days per month on this specific report.
2. So far all additional data filtering and validation were added to the Lotus Notes view that supports the report. Consequently the report used against this view still stays simple.
3. Any variations required for a new report can be done with ease since the base report has all the control breaks, formulas and formats all ready built.

Questions?