



3K IT d.o.o.

3K Report Tool

Administration database, User Guide

Version 10.5

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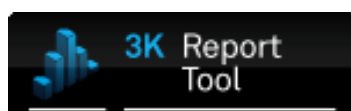


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Setting a report definition

Report definition provides the selection of Domino documents and data definitions to be used in a report. Steps for creating a report definition:

- 1 In Administration database select view Settings > Report definitions.
- 2 Select view action »New definition«.



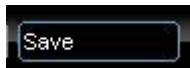
- 3 You get a input form with following fields:

General	Description
Identifier	Unique report definition identifier. For example INV01 for report about invoices.
Title	Report title which will be presented to users when creating a report in a client.
Search modules	Domino databases where report searches for documents. It's possible to select more than one database. Databases are defined through modules - check chapter Other settings > Modules.
Search formula	DB search formula for getting Domino documents to be included in a report.
Date filter field	Date field for limit search formula. Date period is selected by user when creating a report in a client. Date field must be defined among the report fields.

Default settings	Description
Category 1	Fields which set report settings when opening a report. For the meaning check chapter Setting a report definition > Default settings.
Category 2	
Category 3	
Category 4	
Sum column	

Report fields	Description
From 1 to 20 fields	Definition of report's data. For creating a data from an existing view check the chapter Setting a report definition > Create a definition from a view. For manual editing check the chapter Setting a report definition > Edit, add, delete fields

- 4 You save the definition by clicking »Save« button. When saving a definition required fields are checked. In learning about a report definitions we strongly recommend you to make some definitions from existing views (next chapter).

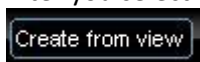


- 5 After successful save the report is ready for use in Report Tool client.

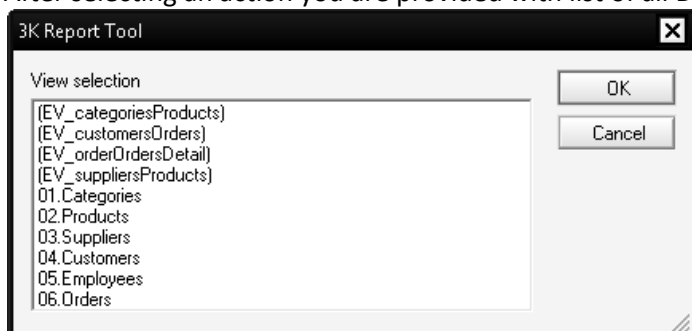
Create a definition from a view

The fastest and easiest way of creating a definition is creating form a view. Steps to create definition from a view:

- 1 Create new definition and select search module.
- 2 After you select a search module an action »Create from view« appears on a form.



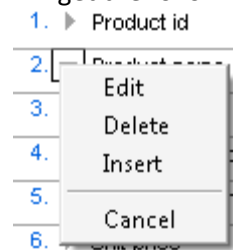
- After selecting an action you are provided with list of all Domino views in a selected module.



- Select the view and confirm selection by clicking »OK« button. After confirmation search formula and report fields are transferred on a report definition. Search formula is equal to selection formula of a chosen view and report fields match view columns. Field name is equal to column title, calculation formula is equal to column formula, data types and display formats are calculated from column data. If a view column is categorized, categorization is set to »Yes«.

Edit, add, delete fields

You can edit, add or delete fields by clicking an arrow ► by field name. If field is already entered you will get the following options:



Option	Description
Edit	Editing data already defined for a field.
Delete	Deleting a field.
Insert	Inserting field before the selected field. The order of the fields is important because the fields in the report appear in the same order as defined in definition.

If you select an arrow by undefined field (last one), click means you are adding a field. When adding, editing or inserting a field you will be provided with the following dialog box:

Report field

Field name	Product name
Calculation formula	ProductName
Data type	string
Display format	
Categorization	☐ Yes
Filter	☐ Yes
Programmatic name *	

* Specify the programmatic name only if you want to use the field value in a calculation formula of another field. The programmatic name should always start with a \$.

Field	Description
Field name	Field name as it will appear on the report.
Calculation formula	Formula to calculate field value in Lotus Domino @formula language. Formula is calculated in a context of a found document. If formula evaluation returns table, only a first value is included in report. If you want all values of a table to included use @Implode function.
Data type	Field's data type. Possible values are string, date or time (dateTime) and number (double).
Display format	Defines the way dates and numbers are displayed. For example display numner with 2 fixed decimal places. Field has no meanings with strings.
Categorization	Select »Yes« if you want to categorize data by that field.
Filter	Select »Yes« if you want to filter data by that field.
Programmatic name	Specify the programmatic name only if you want to use the field value in a calculation formula of another field. The programmatic name should always start with a \$.

Default settings

By default settings you choose report settings when opening a report. In category fields you can use those fields which have categorization value set to »Yes«. Definition has to have at least one default category. Fields defined as categories and not used in default categories can be used for categorization in client.

Field »Sum column« states which number field is used to sum up values in categories. You can use all numeric fields or a value »Number of documents «. Selecting »Number of documents « means that every Domino document will count as value 1. By the sum column there is a field to determine sum function. Available values are Sum, Average, Percent and Percent in category.

Linked documents

Using linked documents you can include data that is not stored on a document found by search formula (source document). The document from which we calculate further information must be in conjunction with the source document (foreign key). Linked documents are of course not mandatory. By using linked documents we can merge data from two different Notes documents in a single row which can't be done by using a Domino view. Compared with the commands in relational databases, linked documents represent the equivalent of SQL JOIN sentence.

You include linked documents by choosing the field »Linked documents«.

▼ Linked documents

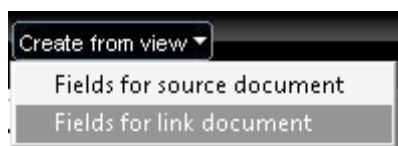
Linked documents	☒ Yes
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Field for linked documents definition:

Field	Description
Link module	Module where we search for linked documents. It can be the same or different than module for source documents.
Link view	Domino view where we search for linked documents. View must have contain linked documents and must have first column sorted by the value from source document. Linked documents are searched by using a method »GetAllDocumentsByKey«. If where are more linked documents found, they are all included in a report – every document in a separate row.
Link formula	Formula to calculate key in a Lotus Domino @formula language. Formula is calculated in a context of a source document. Result of formula evaluation is used as a key in searching a linked view.
Link not found	Defines what to do if linked documents are not found.

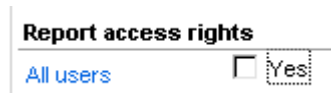
	Available options: • Error by report execution. Terminates report execution. • Document not included in report. Source document is skipped. • In report include only documents without link. Only documents without linked documents are included in a report.
Report opens	Defines which document to open when selecting detail row in a client. Available options: • Source document. • Link document.
Fields order	Defines weather fields from source or link document appear first in a report. Available options: • Fields from source document first • Fields from link document first
Include condition	If field is empty, all linked documents are included in a report. If we want only certain link documents to be included, we can define include contition in a Lotus Domino @formula language. Formula is calculated in a context of a link document.

Fields from linked document are defined in the same way as for source document fields. Editing, adding and deleting fields is the same as when defining source fields. Fields from linked documents can also be used in default settings. Fields from linked documents can be populated from a view by action Create from view > Fields for link document.



Rights for using a report

By default report can be used by all Lotus Domino users for whom Report Tool user license is activated. Report definition can be limited only for a certain users by deselecting a field Report access rights > All users.



In such case report users are defined in a field »Users«, where you can choose users or groups form Domino address book.

License management

Customer data

You can edit the license data by selecting an action »Customer data« in a view Settings > Report definitions.



Customer fields are divided in section Contact data, Billing data and Administration. Contact data fields are by default populated with values entered in a registration form. Fields can be further updated, changes will be synchronized with 3K IT every time when any license action is selected.

Contact data	Description
Customer id	Your customer id, provided by registration.
Organization Name	The name of your company/organization.
Contact Name	Your name and surname.
Job title	Your job title.
Email Address	Your email address. On that email you will receive any information regarding 3K Report Tool product.
Phone	Your telephone.
Fax	Your fax.

Billing data	Description
Address 1	Fields to be entered prior to making an order. Fields are used when sending you an invoice.
Address 2	
Town / City	
Postal code	
State	
Country	
Tax number	

Administration	Description
Number of users	Number of entered users. For managing users check chapter Other settings > Users.
Admin user	Administration user. User defined in this field can use product and doesn't count in defined users. It's possible to enter one administration user.
Clients upgrade	Settings how client upgrades are made. Available options: • Auto update. Clients are upgraded automatically when new version is available on 3K IT web page. • Manual. Clients are upgraded manually using an installation file.

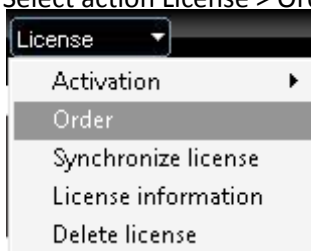
License ordering

After termination of 30 days evaluation period product can be used only by full license. Full license is tied to the number of names users. Every named user requires one full license.

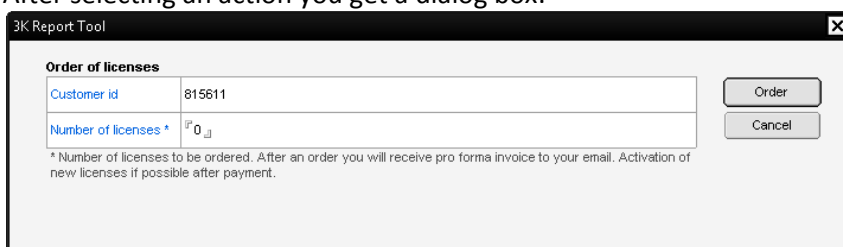
Working with licenses requires Internet connection. If you are using a proxy server, you should fill out fields in »Proxy settings« section.

Steps for making an order:

- 1 Select action License > Order.



- 2 After selecting an action you get a dialog box:



- 3 Enter a number of licenses you want to order in a »Number of licenses« field. Confirm the input by clicking »Order« button. After action is complete you will receive a pro forma invoice to your email. Activation of new licenses is possible after payment is received.

Proforma Invoice No. 815611-001

Pos.	Item Description	Unit Price	Quantity	Total Price
1	3K Report Tool license	100,00	5	500,00
Sub Total:				500,00
Tax:				0,00
Total Due (EUR):				500,00

IMPORTANT:

Please pay in currency you have been invoiced (EUR).
This proforma invoice is not the official invoice. You will be sent a paper invoice upon payment.

Wire transfer to:

Nova Ljubljanska banka d.d., Ljubljana,
Trg republike 2, 1520 Ljubljana
IBAN: SI56020450253599513
SWIFT CODE: LJBAS12X

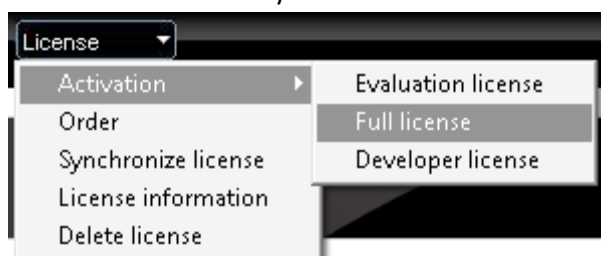
PayPal payment:

For PayPal payment click BuyNow button.



Licenses activation

You activate licenses by selection an action License > Activation.



Activation type	Description
Evaluation license	Meant for using a product in an evaluation period.
Full license	Meant for using a product after termination of evaluation period. Activation is possible after receiving payment for an order. Number of activated full licenses determines how many users can use a product.
Developer license	Developer license is meant for partner companies. Partner companies are

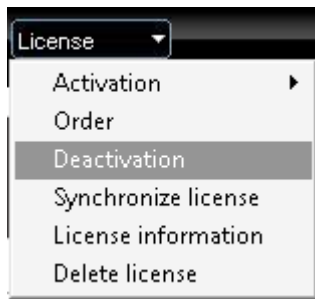
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Data about current license state are always available in License section. History of licenses request is available in License history section.

License	
License type	Evaluation license
Valid until	25.08.2010
Key	2639CC9980A147E5124956E72A0552FE74BBC65BBB6F 1658CC2437D18C57EC45072A9CC1455ACB39AA76FF4:

Licenses deactivation

If you want to move Administration database to another location, you should first deactivate licenses used by current Administration database. You can do this by selecting as action License > Deactivation.



After deactivation the number of entered licenses will become free and you can use them in another Administration database. You can use unlimited number of Administration databases as far as sum of activated licenses in all Administration databases don't exceed the number of all purchased licenses. You can synchronize the state of licenses for current Administration database by selecting an action License > Synchronize license.

Action License > License information returns information about licenses for all your Administration databases.

Other settings

Modules

Module documents contain information about Domino databases where reports search for documents. Before Domino database can be used in a report definition it must be entered as module document. Steps for creating a module document:

- 1 Select view Settings > Modules
- 2 Select view action »New module«.



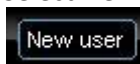
- 3 Fields on module form:

Field	Description
Identifier	Unique identifier for module document.
Description	Module description meant for easier module management.
Server access	Domino server and path for Domino database. You can enter fields manually or select database with clicking an arrow ▶.
Server and Path	
Local access	In case database is on local you have to enter those two fields.
Server and Path	

Users

All Report Tool users must be added to a list of users. In evaluation version you can enter unlimited number of users. When using a full version the maximum number of users is equal to the number of activated licenses. Steps for creating a user document:

- 1 Select view Settings > Users.
- 2 Select view action »New user«.



- 3 In the field »User name« select user from Domino address book.
- 4 Select actions »Save« and »Exit«.

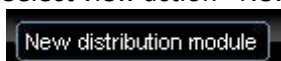
You can enter multiple users by selecting a view action »Import users«. In a dialog window select all users and confirm selection.

You can delete users by selecting a view action »Delete users«.

Distribution modules

You can run 3K Report Tool from any Domino database. Database from which you want to run a report must be first entered among modules. Next step is to create a distribution module document. Steps for creating a distribution module document:

- 1 Select view Settings > Distribution modules.
- 2 Select view action »New distribution module«.



- 3 In a field »Distribution module« select module where you want to run a report.
- 4 Select action »Save«.
- 5 Select action »Copy design«. Action will copy all necessary design elements into a target database. For successful execution you need at least Designer access rights in a target database.

After copying a design you have to open a target module in a Domino Designer. Add an action on a form or view where you want to run a report. Set action label to »3K Report Tool« in implement the following action formula:

@Command([ToolsRunMacro];"3KreportTool").

Managing access rights

For production use you have to set proper access rights for Administration database (ACL).

Steps for setting access rights:

- 1 Select view Settings > Report definitions
- 2 Select an action »About application«. Action is located on the right side of the action bar.



- 3 Section »Access rules settings« defines access rules.

Access rules settings			
User	Access level	Roles	Other rights
Typical user	Author		Create documents
Database manager	Manager	[Administrator]	Delete documents

- 4 Open Access Control List (ACL) of Administration database and set the access rights.

Managing errors

All errors which occur when using an application are logged in a view Administration > Error log. In case of problems please send us the corresponding error log which will help us when solving a problem.