



HELP - Chart requests

Requirements

Desktop platforms: Windows 10/8/7/Vista/XP, Mac OS X/9
Desktop software: Notes 9/8/7 and Excel 2016/2013/2010/2007/2004/2003 [or]
Web client and Excel 2016/2013/2010/2007/2004/2003 [or]
Web client and Excel Viewer (free)
Server platforms: Windows 2016/2012/2008/2003/2000, Linux, IBM i, AIX, Solaris
Windows server required for web client access
Server software: Domino 9/8/7, Excel 2016/2013/2010/2007/2003 required for web client access

The Domino Administrator should sign the Print Merge Reporter database, or you can click the button below to add/edit "**Lotus Notes Template Development/NotesMail**" entry in your Notes ECL with full Workstation security access. Click Refresh - OK after updating ECL and restart Notes.

[Edit Lotus Notes ECL](#)

If the Excel [File Block](#) settings configured by you or your administrator are set to **Do not open selected file types** for "Text Files", then the Chart request will not work properly and an error message will be displayed. The user can resolve this issue by trying one of the methods below.

1. [Disable the restriction by yourself](#) in Excel 2010 or higher: (a) Click the File tab, (b) Under Help, click Options, (c) Click Trust Center, and then Click Trust Center Settings, (d) In the Trust Center, click File Block Settings, (e) Clear the Open check box for the "Text Files" file type, (f) Click OK two times.
2. Launch the appropriate "UnblockExcel20XX.reg" Windows registry file below to re-enable certain file types that are blocked by default, then click Yes - OK when prompted and reboot the computer.
3. Contact your IT help desk (software administrator) to fix the issue.



UnblockExcel2016.reg UnblockExcel2013.reg UnblockExcel2010.reg UnblockExcel2007.reg UnblockExcel2003.reg

Instructions

Chart request

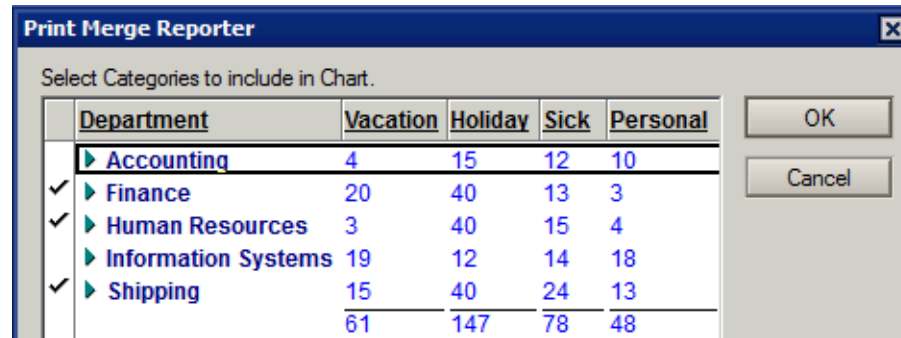
1. Create a simple view/folder in the database where your data resides. The 1st visible view column should be categorized and can display any data type. Additional columns should display a number data type and use a totals attribute.
NOTE: Categorization and a totals attribute are recommended, but not required.
2. Open Print Merge Reporter database. Click the "Create Chart Request" button. Fill out the required fields.

Generate chart

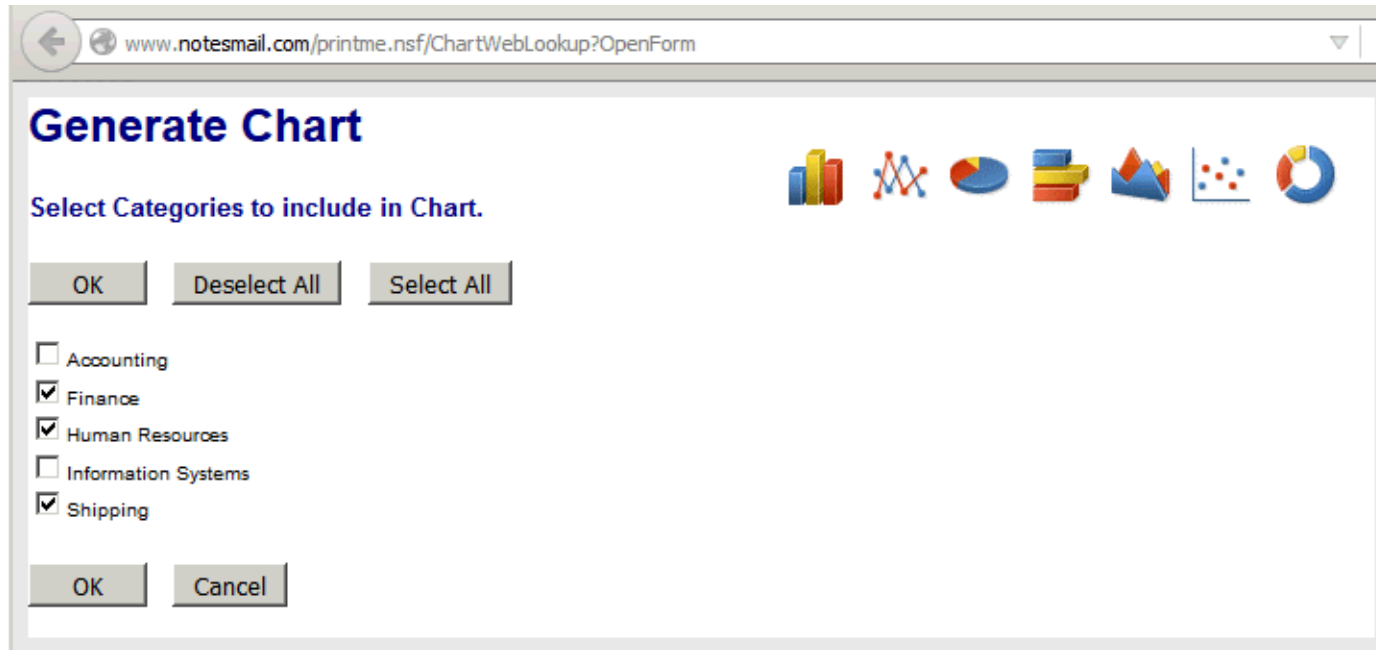
The following instructions should be used when generating a chart for categories (or documents) in a folder or view referenced in the chart request document:

1. Click the Generate Chart Action.
2. Select Categories (or documents) to include in Chart.
3. Click OK.

Notes client example



Web browser client example



Integration

The formula code below can be copy/pasted into an application Action for seamless integration. If you do not want to accept the NotesMail certificate, it is recommended to sign all the design elements in this database to prevent warning messages by clicking File - Tools - Server Administration - Database Tools - Sign a Database.

i.e. View Action Button:  Generate Chart



Notes client code: PMR-Chart-Notes-ButtonCode.txt



Web client code: PMR-Chart-Web-ButtonCode.txt

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