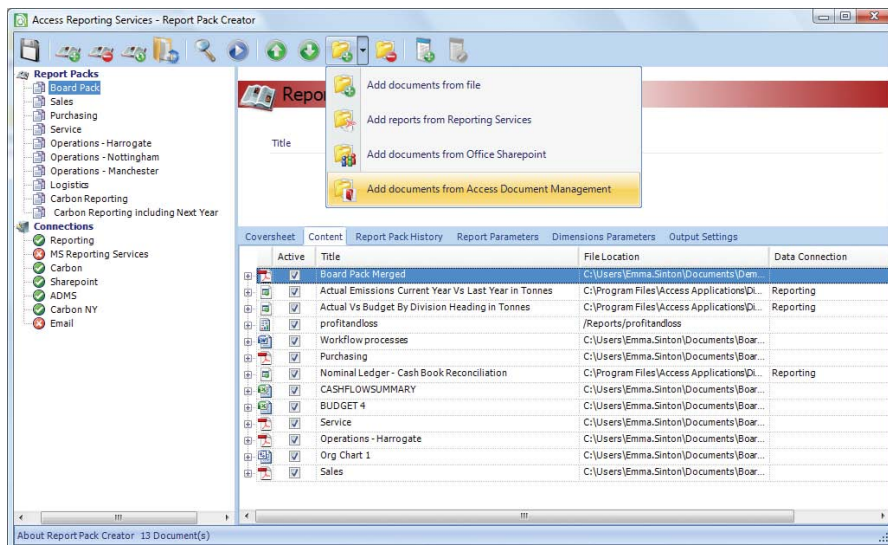


Report Pack Creator

Manually creating board packs can take significant time and effort. Information generated across your business has to be gathered into a coherent document, tailored to stakeholder requirements then delivered when and where it's needed - all the while utilising the most up-to-date information. Report Pack Creator overcomes all these challenges. Utilising simple wizards and configuration tools, you can create professional-looking board packs in just a few clicks. Saved versions can be quickly edited, so there's never any need to start from scratch. The result is a user-friendly board pack that's not just quick to create and fast to deploy - it looks great too!



All-inclusive: Report Pack Creator makes it easy to collate information generated business-wide, ensuring that your stakeholders receive a comprehensive and coherent board report.

Document types

Any electronic document can be gathered for inclusion in the pack. Simply browse to the relevant area of your system to select files such as Word documents, PDFs and spreadsheets then click to include them within a list. When you have all the files you need, simply shuffle them up/down within the list to reflect your agenda.

Up-to-the-minute information

Board reports held within the pack can have a real-time link to your core data, so changes and updates made elsewhere are pulled through into the pack automatically.

Branding your report pack

For that professional look and feel, you can easily import watermarks, company logos or any other graphics.

Straightforward navigation

Report packs are often heavy on content, making it difficult to locate specific areas and items. An index page itemises the sections within the pack and provides hyperlinks to them, encouraging staff to read reports off-screen and only print the pages that they really need.

Output & destinations

Once you're happy with the look, feel and content of your report pack, simply click to generate a single PDF (or change the default setting to meet individual stakeholder viewing requirements). You can then deliver your board pack when and where it's required; for example, to our Access Document Management solution, your SharePoint site or via email to a pre-defined list of recipients.

Key benefits

Reduce manual administration

Deliver up-to-date information

Meet individual stakeholder needs

Include all sources of information

Reduce paper and printing

Professional look and feel

Functionality

This section provides detailed coverage of the functions available within Report Pack Creator.

General functions

- One-click 'New Report Pack' wizard
- Delete/duplicate pack options
- Coversheet page to describe pack's content
- Index page: itemises reports and documents available within the pack and provides hyperlinks for easy navigation
- Each pack configured through a series of tabs and information settings
- No limit to number of board packs you can create/store

File availability

Report Pack Creator supports a broad range of file formats as listed below:

- Crystal Reports
- PDF
- Word/Excel 2003 and above
- Word/Excel 2007 if found

Coversheet tab

This function enables you to reference the contents of your report pack. Functions include:

- Ability to produce a coversheet in Word or PDF
- Search facility to help you locate the coversheet required
- Ability to include an index page
- Configuration options:
 - Title font (font used at the top of the page)
 - Item font (items listed on the index page)
 - Watermark (a PDF, such as a logo, company or information to be used on index page)

Content tab

This function enables you to configure the way individual elements appear within the pack. Functions include:

- Add/Remove document icons - to manage number of documents held within the list
- Nudge up/Down icons - to rearrange order of documents within the report pack
- Refresh documents icon - validates and updates the information held within each document, including page counts and parameter settings for Crystal reports

Other file management facilities include:

- Active flag - to mark inclusion/exclusion of document from next generation of report pack
- Title - holds the title of individual items within the pack - can be defaulted to title found within the document or overridden as appropriate
- File location - shows physical location of the document; ability to re-select the file using 'search' icon
- Data connection - either direct to Dimensions for Crystal or to Microsoft Reporting Services
- Report pack history - can be used to open historic report packs without navigating to the correct folder using Windows Explorer

Report settings

Enables you to set parameters for the inclusion of reports held within your Access system, enabling you to:

- Allow individual parameters (e.g. 'Year') to be applied across the pack and for override facilities to be set on individual reports
- Apply parameters for both Crystal reports and/or those used by Dimensions.
- Enter search criteria normally only available via Dimensions ACR to Crystal reports

Output settings:

A series of tick boxes enable you to determine the destination of the completed report pack, including:

- Output to PDF - generates a single PDF document of the entire pack
- Output to Access DMS - instructs system to publish report packs to the Access Document Management store
- Output to file - enables you to publish packs to a SharePoint site or for delivery via email
- 'Create folder for the report pack' option

Icons

- Magnifier - provides you with a preview of the index page to ensure that you are happy with the look and feel of the report and that it contains the correct document/report references
- Forward arrow - runs the selected report pack and generates the output document

Who we are

Access will give you the advice, tools and clarity you need to make effective decisions, quickly and with certainty. As both a business-focused consultancy and a specialist software developer, we combine our innovative software with practical experience to deliver a solution that's exactly right for you and your business.

We believe your solution must be ready for the future, as well as right for today. Because your business will constantly evolve, we provide a software solution that grows with you. Our modular software covers a complete range of business, financial and administration processes and can be flexed to give you the precise view of your business that you need at any time.

With Access, you can be sure you've got the clarity you need to reach your business goals.