**Settings/Functions on the “Create View” Page**

● “Report View Name” → sets Report View displayname for the roles:

FirmManager and Advisor.

○ Text box

○ Character limit = 255

○ Validation: once user clicks outside of “Report View Name” textbox,

validate displayname character count <= 256

■ If Fails validation, then display red border around text box

● Radio Icon “Report Type” component with options for Firm Report / Client

Report → sets Report View viewcontext

● Radio Icon “Format” component with options for CSV / PDF/ XLS → sets

Report View format

● Radio Icon “Orientation” component with options for Landscape/Portrait →

sets Report View orientation

○ IF ReportView format = PDF, then show Orientation component only

for FirmManager.

○ Else hide Orientation component

● Button: “Create View”

○ “Create View” is greyed out and not clickable unless:

■ displayname is not null

■ viewcontext is not null

■ format is not null

■ IF format = PDF, then orientation is null

○ Upon click, attempts to create and save Report View object

■ Save Validation: upon save, validate that displayname must be

unique within firm

● If Fails validation, then display red border

around text box and prevent save

■ Save Validation: upon save, validate that displayname

character count <=255

● If Fails validation, then display red border around text

box and display message:

○ Upon successful save by clicking Save button, takes you to Report

Builder Page.

