

List Portlet -Design and Configure Report to Run from List Portlet

Description

A report may be run from the **Reports** button on a List portlet. Users may select one or more items in the List portlet by checking their checkbox(es), then run a report from the **Reports** button against the selected items. The report must be specifically designed and configured as described below.

Overview

1. If a report is run from a List portlet's **Reports** button, the user must first select one or more items from the List portlet to run the report against. For example, the user may select one or more Records from the Records list portlet by checking their checkboxes.
2. After checking one or more items in the List portlet, the user then selects a report from the List portlet's **Reports** button. Accela Automation sends the ID's for all selected items to the report in a hidden parameter called "ID". This parameter is not configured in Report Manager. For example, if the user selects one or more Records from the Records list portlet, Accela Automation passes the selected Record ID's to the report in the "ID" parameter.
3. The report's query pulls data for all item(s) that the user selected. This data is displayed in the report output.
4. A single report output may appear and show data from all selected items; or multiple report outputs may appear for each of the selected items, each showing data from an item. This behavior depends on how the report is configured in Report Manager. See step 3(c) in **Configuring Report in Report Manager** below.
5. The value that Accela Automation passes to the report in the "ID" parameter depends on the List portlet where the report is run. See **ID Values for List Portlets** table below for details.
6. Note that a report designed to be run from a List portlet (as described above) cannot be also run *as-is* from the Reports portlet. If the same report must be added to the Reports portlet as well, a different version must be created whose "ID" parameter renamed to something else (e.g. "capID"), as "ID" is a reserved word and cannot be added as a parameter in Report Manager.

ID Values for List Portlets

The table below shows the data value that Accela Automation passes in the hidden "ID" parameter when a report is run from common List portlets. You'll need the **List Portlet Name in Report Manager** to configure the report in Report Manager to appear in the List portlet's **Reports** button. The **Database Table.Column** shows the database table and column where the "ID" parameter value is stored. You'll need this information to create a report filter/selection criteria against the "ID" parameter.

List Portlet	List Portlet Name in Report Manager	ID Parameter Value	Database Table.Column
Record	List - Record List	Record ID	B1PERMIT.B1_ALT_ID
Inspection list within Inspections page (list is not Record-specific)	List - Inspection List	Inspection ID	G6ACTION.G6_ACT_NUM
Inspection list on Record's Inspection tab	List - Record Inspection List	Inspection ID	G6ACTION.G6_ACT_NUM
Trust Account	List - Trust Account List	Account Sequence Number	RACCOUNT.ACCT_SEQ_NBR

Screenshot of *Inspection list on Record's Inspection tab*:

Record ID: DEH2012-CLEA-000083

Menu Manage Inspection Delete Select Record To Copy From Edit Flow View Log Reports Help

Go To Summary Record 01. ASI 02. ASI Tables (3) 03. Fee (0) 04. Workflow 05. Inspections (2) 06. Rel

<input type="checkbox"/>	Record ID	Type	Guide Sheet Count	Status	Scheduled	Inspection Date	Staff
<input type="checkbox"/>	DEH2012-CLEA-000083	Routine	0	Scheduled	07/01/2012		Jim Henderson
<input checked="" type="checkbox"/>	DEH2012-CLEA-000083	Routine	1	Incomplete	04/12/2012	04/16/2012	Jim Henderson

Designing Crystal Report

1. Add a parameter named "ID" (without the quotes) in your report. The parameter is case-sensitive. Set the "Allow multiple values" option to *True* (this is important).
2. Use the ID parameter in report's selection criteria as appropriate. See the **ID Values for List Portlets** table above for the correct database table and column to use in the selection criteria. For example, if the report is to be run from the Record list portlet, the Selection Formula looks like this:
`{B1PERMIT.SERV_PROV_CODE}="YOUR_AGENCY_ID" AND {B1PERMIT.B1_ALT_ID}={?ID}`
3. If using a Command in Oracle (instead of Tables and Database Expert/Select Expert), add the Oracle keyword ANY before the parameter in the filter predicate, and omit single quotes around the parameter. For example:
`B1PERMIT.B1_ALT_ID = ANY {?ID}`

Configuring Report in Report Manager

1. Create a new report in Report Manager and complete the **Report Details** tab.
2. Set permissions as appropriate in the **Permissions** tab. If the report is run from the Inspection list within **Inspections** page (list is not confined to a single Record), permission must be set for the user's default module.
3. In the **Portlet** tab:

1. **Portlet Name:** Select the List portlet where the report is run. See **ID Values for List Portlets** table above for the correct portlet name.

2. **Module:** Select the module where the report is run. If the report is run from the Inspection list within the **Inspections** page (list is not confined to a single Record), this must be the user's default module.

3. **Display:**

1. **Single Window** = If one or many items are selected in the List portlet, all selected item values are sent to the report server in a *single* value (an array) in the ID parameter. The report is run *once*. *One* pop-up window appears, showing the report output.
2. **Multiple Windows** = If one or more items are selected in the List portlet, each selected item value is passed *separately* in the ID parameter to the report server. The report is run once for *each* selected item. Separate windows pop up for each selected item, where each window shows the report output for a different item.

4. In the **Parameters** tab:

1. Do not add the ID parameter, unless the report is run in the Inspections list portlet in the Inspections page (List - Inspection List). See 4(c) below.
2. If the report uses other parameter(s), these may be added. When the report is run, the Report Parameter appears and prompts the user to enter these parameters (but not the ID parameter).
3. If the report is run in the Inspections list portlet in the Inspections page (portlet name = List - Inspection List), add a parameter with the following field values:
 1. Name: Inspection ID
 2. Type: PortletVariable
 3. Report Parameter Name: id (*must be lowercase*)
 4. Required: Yes
 5. Visible: No
 6. Portlet: Inspection List
 7. Default Value: Inspection Sequence Number

Version Number All Versions

Products Accela Automation

File