How to Link Reports

LogiΞ
ANALYTICS

Version 11
Last Updated: March 2014

Linked Reports

Overview

Ad Hoc offers the capability to launch a report via a link in an existing report. This capability requires the assistance of the System Administrator. This paper is intended to help you understand the configuration and utilization of this feature.

Our Project

To demonstrate this capability, we will use the *Employees* data object from the Northwind database. We will build a target report that should be displayed whenever the user exercises the *Last Name* link from a main report. The target report will be filtered by the *EmployeeID* column.

Notice that we will be passing the *EmployeeID* information, however, the hyperlink to launch the target report is based on the employee *Last Name* information. The linked column does not have to be the same column as the data to be passed.

Basics

The basic steps to configuring and using the linked report capability are:

1) Create the target report filtered appropriately
2) Create the link configuration
3) Create the main report enabling the defined link

Note: Any report may be a "target". In older versions of Ad Hoc, the target reports were required to reside in a "Linked Reports" area. That restriction has been removed as has the "Linked Reports" area.

Create the target report

Generally, the first step in the process is to create the target report. Most target reports contain information extending the content that might be displayed in the main report. The target report is typically filtered by information passed from the main report. If the target report isn't filtered, the report is essentially a static report and no parameters must be passed to it.

We will build a report that is intended to show more details about the employee than the main report shows. Our target report will have the employee's *Last Name*, *First Name* and complete address (*Street*, *City*, *State* and *Zip Code*).

We will assume that you know how to create an Ad Hoc report from the *Employees* table.

The key for this exercise is to create a non-ask parameter in the target report to filter the content. Since this is a target report, the non-ask parameter value will be populated from the main report when the report is run. For now, create the target report with a default value for the non-ask parameter.

Create the link configuration

Our goal in this step is to set up the link configuration properly. The three key configuration functions are:

- identify the column that will act as the source of the hyperlink
- identify the target report to be linked to when the link is exercised
- identify the information to be passed to the target when the link

From the **Configuration / Data Object Configuration / Data Objects** page, find the *Employees* data object and click on the **Set Links** action.

The links page will be presented with a list of columns and their current link configuration. Find the *Last Name* column and click on the **Add Link** action.

For our example there are two basic steps:

1) Identify the target report
2) Set the parameters to be passed to the target report

To identify the target report, click on the **Link to an Ad Hoc Report** option. The dialog will change to:

Use the magnifying glass for the **Linked Report** attribute to select the target report. It is not recommended that you type in the report name.

To set the parameters to be passed, click on the **Add a Link Parameter** button.

Use the magnifying glass associated with the **Parameter Name** attribute. This will identify the parameter(s) being used by the target report. Select one from the list shown. It is not recommended that you type in the **Parameter Name**.

Note: This is why we built the target report first. Ad Hoc can determine the parameter that must be supplied with information from the main report. There is no special consideration in the target report for the consumption of the data values passed to it.

The **Parameter Source** drop-down list presents a list of columns available from the data object originally selected, in this case the *Employees* data object. Select the appropriate column that should be used as the source of data values to be passed from the main report to the target report. In this case the *Employees.Employee ID* column should be selected.

The completed link dialog for this example would appear as:

Click on the **OK** button to save the link information.

Create the Main Report

Create the main report as you would normally. If you include the *Employees. Last Name* column in the report, you will have the option to make the values in the column "linkable".

This option is only shown when the **Column Configuration** tab **Show All Attributes** option has been selected and there is at least one column in the data source that has been configured with link information.

Expected Behavior

When the main report is executed, the *Last Name* column will be presented with the values appearing as hyperlinks.

Last Name	First Name
Davolio	Nancy
Fuller	Andrew
Leverling	Janet
Peacock	Margaret
Buchanan	Steven
Suyama	Michael
King	Robert
Callahan	Laura
Dodsworth	Anne

When any of the links are exercised, the target report will be launched and the *Employee ID* value associated with the *Last Name* will be passed to it. The target report will filter the data by the *Employee ID*.

Clicking on Callahan, for example, will display content similar to the following report:

Employee Information

Callahan, Laura
4726 - 11th Ave. N.E.
Seattle, WA 98105