

Logi Ad Hoc Reporting
Linking Reports



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Introduction

Ad Hoc offers the capability to launch a report via a link in an existing report. This capability must be configured in advance by the System Administrator. This document is intended to help you understand the configuration and utilization of this feature.

Our Demo Project

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

Notice that we'll 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 that's passed.

The Basics

The basic steps for 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 can be a "target" report. In older versions of Ad Hoc, the target reports were required to reside in a "Linked Reports" area. In more recent versions, that restriction has been removed, as has the "Linked Reports" area.

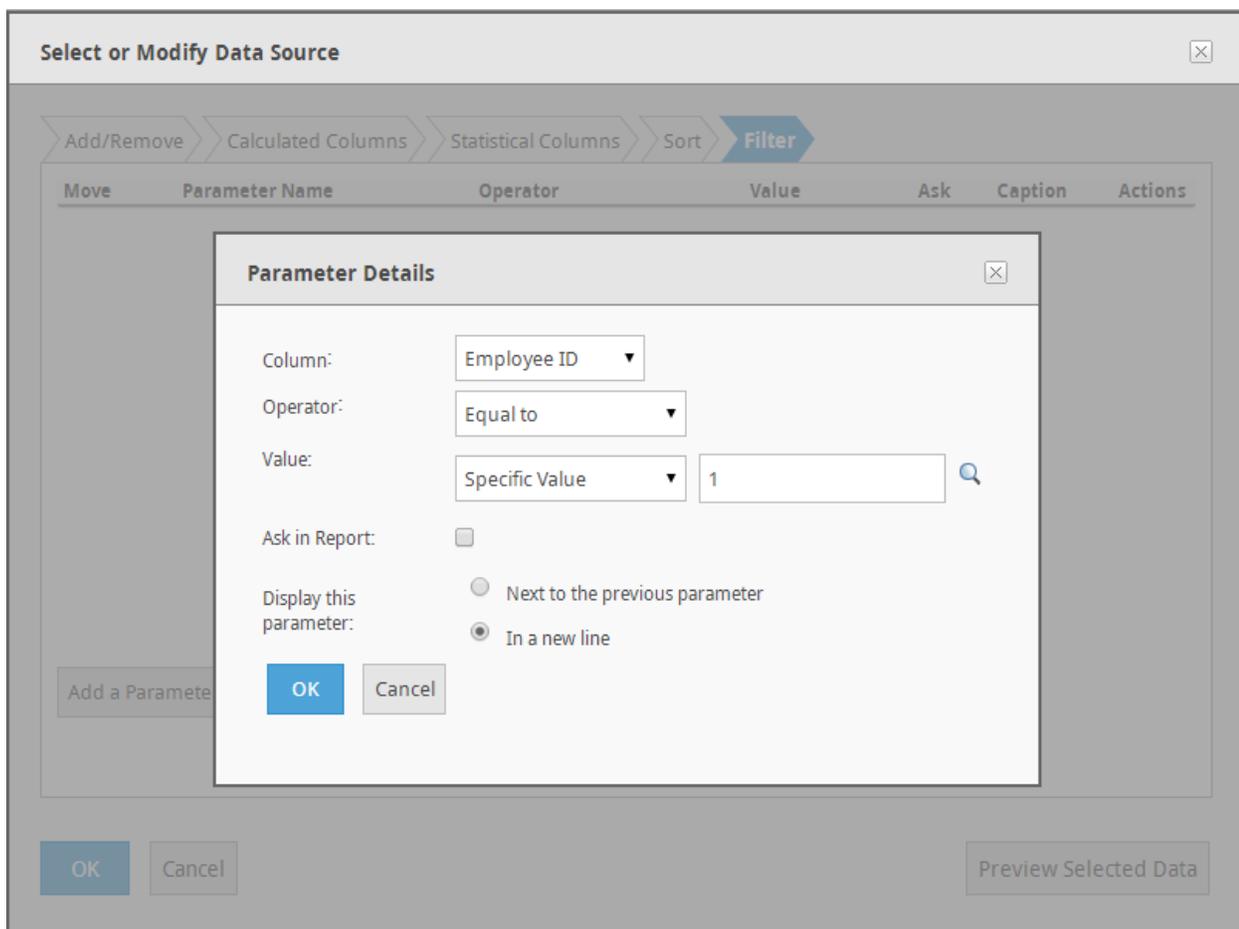
Creating the Target Report

Generally, the first step in this 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'll 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'll assume that you know how to create an Ad Hoc report using the *Employees* table.

The key activity in 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, as shown below:



The screenshot shows the 'Select or Modify Data Source' dialog box with the 'Filter' tab selected. A 'Parameter Details' sub-dialog is open, showing the following configuration:

- Column: Employee ID
- Operator: Equal to
- Value: Specific Value (1)
- Ask in Report:
- Display this parameter:
 - Next to the previous parameter
 - In a new line

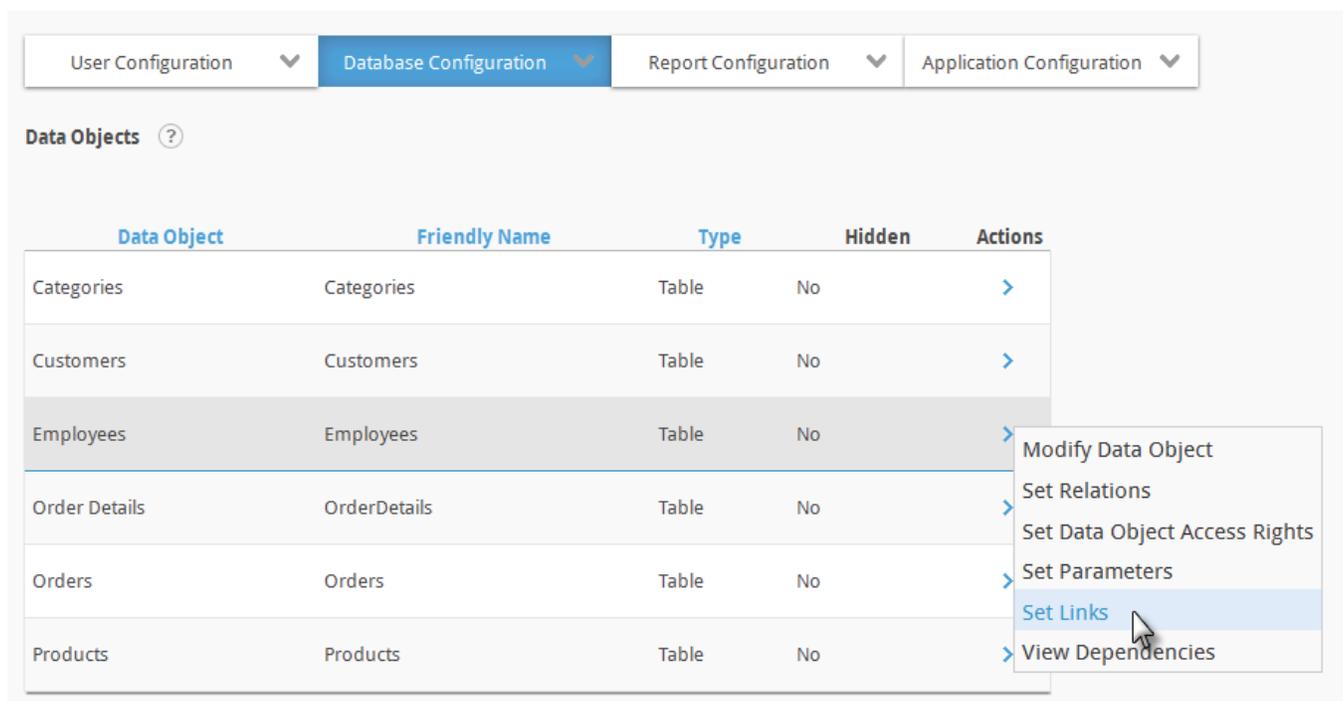
Buttons for 'OK', 'Cancel', and 'Preview Selected Data' are visible at the bottom of the dialog.

Creating the Link Configuration

Our goal in this step is to set up the link configuration properly, by:

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

In the instance, navigate to the *Configuration* → *Database Configuration* → *Data Objects* page, find the *Employees* data object and click on the **Set Links** action:



The screenshot shows the 'Data Objects' configuration page. At the top, there are four tabs: 'User Configuration', 'Database Configuration' (selected), 'Report Configuration', and 'Application Configuration'. Below the tabs, the page title is 'Data Objects' with a help icon. A table lists the data objects with columns: 'Data Object', 'Friendly Name', 'Type', 'Hidden', and 'Actions'. The 'Employees' row is highlighted. A context menu is open over the 'Actions' column for the 'Employees' row, showing options: 'Modify Data Object', 'Set Relations', 'Set Data Object Access Rights', 'Set Parameters', 'Set Links' (highlighted), and 'View Dependencies'.

Data Object	Friendly Name	Type	Hidden	Actions
Categories	Categories	Table	No	>
Customers	Customers	Table	No	>
Employees	Employees	Table	No	>
Order Details	OrderDetails	Table	No	>
Orders	Orders	Table	No	>
Products	Products	Table	No	>

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

Note:

If a link has already been defined for the column, the action will be **Edit Link**. A column can only have *one* link defined.

User Configuration ▾ Database Configuration ▾ Report Configuration ▾ Application Configuration ▾

Data Objects > **Links for 'Employees' Object** ?

Database Connection: New Report Database
 Selected Data Object: Employees ▾

Column Name	Label	Link	Actions
EmployeeID	EmployeeID		>
LastName	LastName		> Add Link
FirstName	FirstName		>

The **New Link Information** dialog box will be displayed:

Information for new link [X]

Link to Any URL
 Link to an Ad Hoc Report

Link URL:

Window ID:

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="button" value="Add a Link Parameter"/>		

To identify the target report for our demo scenario, select the **Link to an Ad Hoc Report** option. The dialog box format will change to:

Information for new link ✕

Link to Any URL
 Link to an Ad Hoc Report

Linked Report: 🔍

Window ID: ▼

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="button" value="Add a Link Parameter"/>		

Use the magnifying glass icon to select a target report for the **Linked Report** value. Entering the report name manually is not recommended.

Information for new link ✕

Link to Any URL
 Link to an Ad Hoc Report

Linked Report: 🔍

- Personal Reports
- Shared Reports
- Global Reports

Favorites Dashboard

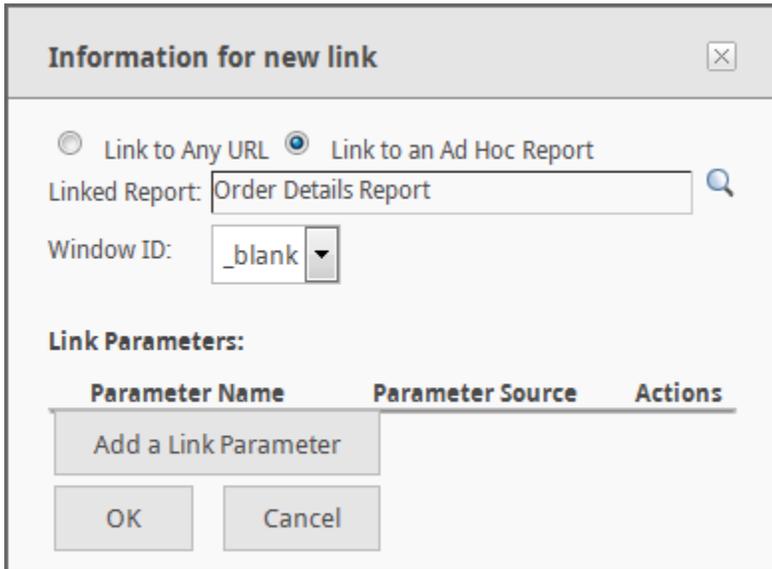
Order Details Report

Window ID: ▼

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="button" value="Add a Link Parameter"/>		

Select the desired detail report (we'll use the *Order Details Report*) and click **OK**. The dialog box format will change again:



Information for new link [X]

Link to Any URL
 Link to an Ad Hoc Report

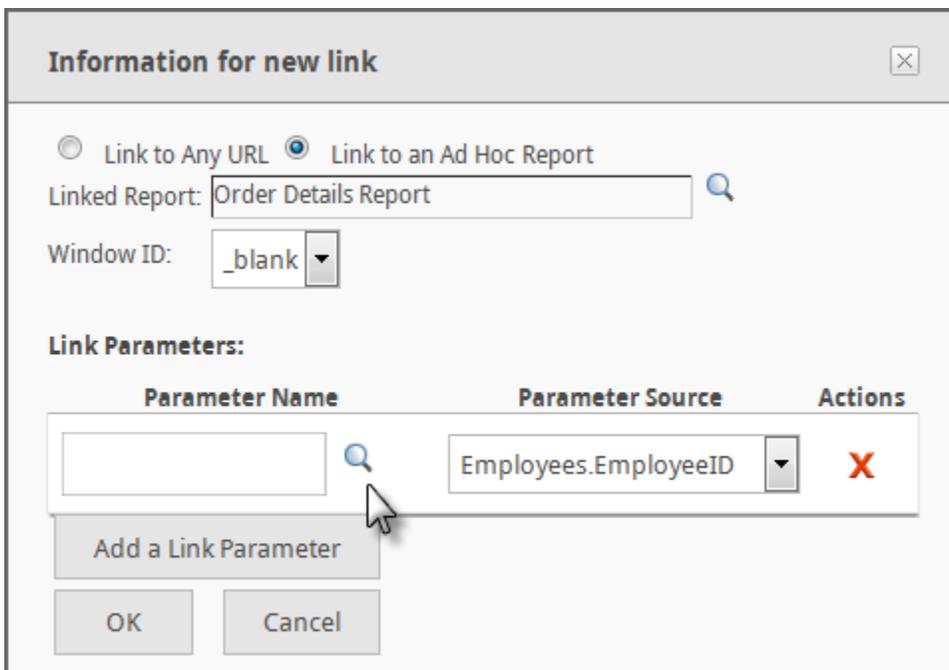
Linked Report: [Search]

Window ID: [v]

Link Parameters:

Parameter Name	Parameter Source	Actions
Add a Link Parameter		

To set the parameters to be passed when the link is clicked, click **Add a Link Parameter** to display the Link Parameters values controls:



Information for new link [X]

Link to Any URL
 Link to an Ad Hoc Report

Linked Report: [Search]

Window ID: [v]

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="text"/>	<input type="text" value="Employees.EmployeeID"/> [v]	X

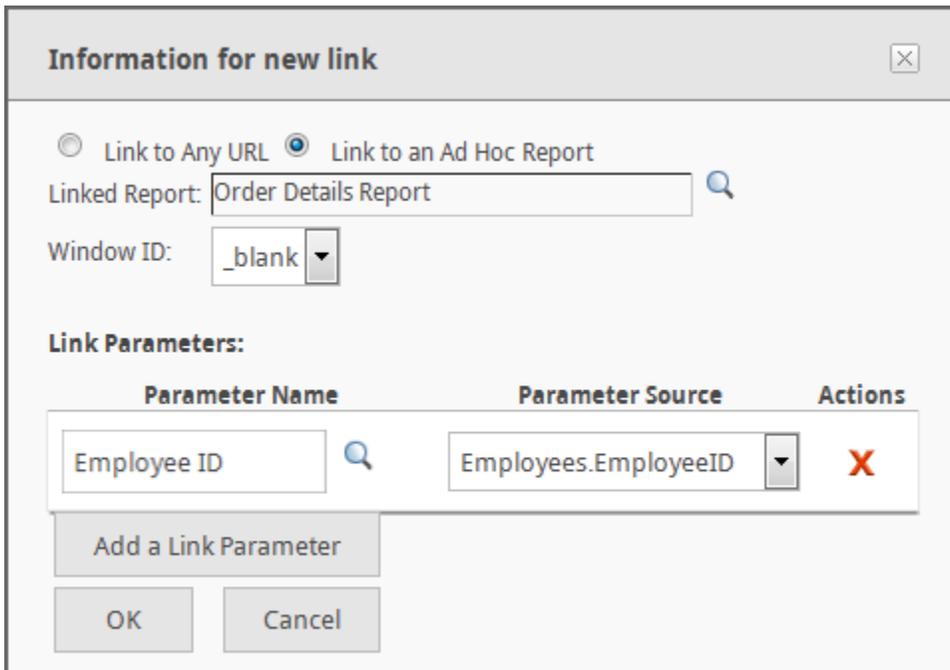
Use the magnifying glass associated with the **Parameter Name** attribute to list the parameters being used by the target report and select one. Entering a parameter name manually not recommended.

Note:

This is why we built the target report *first*. Ad Hoc can determine the parameters 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 our demo scenario, the *Employees.Employee ID* column should be selected.

The properly complete dialog box will look like this:



Information for new link [Close]

Link to Any URL
 Link to an Ad Hoc Report

Linked Report: [Magnifying Glass]

Window ID: [Dropdown Arrow]

Link Parameters:

Parameter Name	Parameter Source	Actions
<input type="text" value="Employee ID"/> [Magnifying Glass]	<input type="text" value="Employees.EmployeeID"/> [Dropdown Arrow]	X

If we had additional parameters to include, click just repeat the process for each parameter.

Click the **X** icon to remove a parameter from the list.

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

Creating 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”.

☐ Show Minimum Attributes

<input type="checkbox"/>	Column	Header	Linkable	<input type="checkbox"/>	Sortable	Sun
<input type="checkbox"/>	Last Name	Last Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>		

This option will only be visible 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 run, the *Last Name* column will be presented with its 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 clicked, 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*.