



## v4 Linked Reports

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Handbook

**CAPITA**

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# V4 Linked Reports

## Introduction

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The purpose of this handbook is to provide a general understanding of the v4 Linked Reports functionality and detail the parameter information exchanged by the V4 Client on route focuses in the system.

The exchanged parameters allow Linked Reports to be designed to be processed with minimal user input ensuring multiple parameter names are created correctly unless extra parameter values are required.

Linked Reports can be designed and linked into multiple screens within the One v4 Client however in order to achieve a report that will run successfully with minimal user input it is advisable that the guidance provide within this document is adhered to especially the stated 'Parameter names'.

## What's New in this Release

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Reports that are in the folder, *Report Definition Repository\Early Years\Search for a Funded Service* now use the parameter *LaServiceProviderDetailId*.

For more information, see *Report Parameter Details Exchanged in the v4 Client* on page 2.

## Functional Overview

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Where a report has been saved in a report folder location that supports Linked Files within the One v4 Client, where permitted to the Report Folder (Tools | Permissions | Report Permissions) the user will see the name of the report under the 'Reports' section in the 'Links' panel of the respective route focus associated with the report folder.

**Note:** If no reports have been saved within the report folder the 'Reports' section will not be displayed in the 'Links' panel for the associated route focus.

## Processing Linked Reports

The v4 client exchanges parameter values to the linked reports when processed i.e. report name link is selected and at this point the system will validate whether the parameter name(s) exchanged by the v4 client machine exist in the linked report.

The validation process can result in 1 of 2 basic actions:

1. The system will process the report and display the result or
2. A message prompt is displayed as report parameters exist which the system cannot auto populate

Further information has been provided in the following table:

SCENARIO	OUTCOME
The Client exchanges 1 parameter	Where a matching parameter name is or is not found the system will pass the parameter value and process the report. <b>Note:</b> where 1 parameter is exchange by the client the parameter name is not validated.
The Client exchanges 1 parameter and more parameters exist in the report	Where more parameters exist within the report than are exchange by the client a message prompt is displayed.
The Client exchanges 2 parameters and all matching parameter names are validated	The system will pass the parameter values and process the report.
The Client exchanges 2 parameters and all matching parameter names are not validated	If matching parameter names are not found or more parameters exist within the report than are exchange by the client a message prompt is displayed.

The message prompt displayed will be:

‘Report parameter values exist that are not provided by the client, please entered the parameter values manually’, selecting ‘OK’ to the message prompt will display a ‘Provide Parameter Values’

The modal window will allow the user to manually enter the unmatched parameter values.

**Note:** Where extra parameters exist in a linked report and this relates to an ‘ID’ the user must be able to provide this information within the ‘Provide Parameter Values’ at runtime. Where this is not displayed in the client a sub report may be required to extract the data based on the main parameter(s) exchanged.

## How to Display a Student, Person or Base Selector

It is possible to force the v4 Client to provide the user with a Student, Person or Base search function in the ‘Provide Parameter Values’ modal window. To enable the function follow the information below for current or extra parameter values:

- Provide a Student or Person Search; the report parameter **MUST** be named as one of the following ‘PERSONID’, ‘STUDENTID’, ‘STUDID’ or ‘ENTITYID’ and the name is not case sensitive
- Provide a Base Search, the report parameter **MUST** be named as one of the following ‘BASEID’ or ‘SCHOOLID’
- Provide a multiple base selector; the report parameter **MUST** be named as ‘BASEIDLIST’. The system will display the list of Bases with a checkbox to allow multiple values to be selected

**Note:** The above setup is not required where the system already exchanges either ‘StudentID’, ‘PersonID’ or ‘BaseID’ in the route focus.

## Report Parameter Details Exchanged in the v4 Client

A complete list of parameter names exchanged in the v4 Client is provided below along with the report folder directory to which the linked report should exist in order that the system can then display the report in the ‘Reports’ links section on the ‘Links’ panel in the respective route focus.

Report Folder	Route Focus	Parameter Names
Attendance Reports	Focus   People   Student Enquiry   Student Details – Student Attendance Link	‘EntityID StartDate AY Period’
Base Summary Reports	Focus   Bases   Base Enquiry   Base Definition	‘BaseID’
CSS Student Summary	Focus   People   Student Enquiry   Student Details	‘StudID’

Report Folder	Route Focus	Parameter Names
Reports		
Student Summary Reports	Focus   People   Student Enquiry   Student Details	'StudID'
Communication Log Reports	Focus   People   Student/Person   Student/Person Enquiry - Communication Log link  NOTE: The Communication Log can also be accessed from multiple areas of One v4.	'CommunicationID'
V3 Migration Reports	Focus   Tools   Administration   Migration   Migrate v3 Service	'ServiceID'
Early Years\Authorise Payments	Focus   Early Years   Authorise Payments   Payment Authorisation Enquiry   Authorisation Window	'AuthID'
Early Years\Providers	Focus   Early Years   Search for Provider   Search for Childcare Provider   Maintain Provider	'ProviderID'
Early Years\Bank Slips	Focus   Early Years   Generate Bank Slips   Bank Slips Batch Enquiry   Bank Slip Batch Details	'LaBatchIncomeBankSlipsID'
Early Years\Income Receipts	Focus   Early Years   Generate Income Receipts   Batch Income Receipts Enquiry   Batch Details	'LaBatchIncomeReceiptsID'
Early Years\Generate Payments	Early Years   Generate Payments   Payment Run Enquiry	'LogID'
Early Years\Funded Providers Payments	Early Years   Search for Funded Services   Funded Service   Payment Details link	'LogID LaServiceProviderService'
Early Years\Funded Providers Hours	Early Years   Search for Funded Services   Funded Service	'LaServiceProviderId LaServiceProviderServiceID'
Early Years\Search for a Funded Service	Early Years   Search for Funded Services   Funded Service	'LaServiceProviderDetailID'
Early Years\Enquiry Provision	Enquires   Enquiry   Enquiry Details   Previous Enquiry List (Add/Edit)   Previous Enquiry Details - Panel '06. Enquiry Search List' (Add)   Additional Enquiry Searches ('Search for Provision')   Search for Provision	'EnquiryId RequestID'
Early Years\Service Provision	Focus   Search Service Provision   Maintain Service Provision	'ServiceDetailID'
Impairment\Hearing Impairment	Focus   People   Person   Person Details   Involvement Details   Hearing Impairment.  The Involvement Details can also be accessed from multiple areas of One v4	'InvolvementId StudentID'
Social Network Reports	Focus   People   Person   Person Details   Social Network  The Social Network can also be access from multiple areas of One v4	'EntityID'
Child Protection Reports	Focus   People   Person   Person Details   Child Protection Link  Focus   People   ICS Person   ICS Person Details   Child Protection Link	'PersonID'
Person Summary Reports	Focus   People   ICS Person   ICS Person Enquiry   ICS Person Details	'Exception'
Assessment Stage Validation Reports	Focus   Analysis Reporting   Data Collection   Projects   Project Enquiry   Project Detail – Export Link – Export (Export Report)	'Exception_List Exporting'

<b>Report Folder</b>	<b>Route Focus</b>	<b>Parameter Names</b>
Geographic Area Reports	Focus   Analysis Reporting   Areas, Clusters & Groupings   Polygon Geographic Area	'ID'
Assessment Stage Validation Reports	Focus   Analysis Reporting   Data Collection   Projects   Project Enquiry   Project Detail (Assessment Stage / Census Report)	'ProjectID'
Impairment\Visual Impairment	Focus   People   Person   Person Details   Involvement Details   Visual Impairment  The Involvement Details can also be accessed from multiple areas of One v4	'InvolvementId StudentID'
Person Details Reports	Focus   People   Person   Person Details	'StudID'