

IBM Maximo Asset Management V7.1

Using the report list portlet



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In this training module, users of Maximo® Asset Management 7.1.1.4 and higher, and Maximo 7.5.1 and higher, learn how to set up and use a report list portlet on the start center.

Objectives

When you complete this module, you can perform these tasks:

- Enable the report list portlet in the security group application
- Configure security rights to the report list portlet
- Add a report list portlet to the start center
- Add a report to the new portlet
- Run the report from the portlet

When you complete this module, you can perform these tasks:

Configure security rights to the Report List portlet.

Add a Report List portlet to the Start Center.

Add a report to the new portlet.

Execute the report from the portlet.

Enabling the report list portlet

To use the report list portlet, you must install the package file that IBM provides. Without it, you cannot add the report list portlet to any start center because it is not an option in security group module.

You can obtain the package file and step-by-step instructions on how to install it from this link:

<http://www-01.ibm.com/support/docview.wss?uid=swg21380495>

Note: *This training module does not describe the actual installation of this package file*

The first thing required before you can assign security to the portlet is to enable the portlet in the security group application. You must download a separate package file from the support site and install it on the Maximo server. This package file and installation instructions are found at the web address shown on this page.

The installation steps and potential issues encountered while installing the package file are not included in this training module. This training begins from the successful installation of that package.

Configuring security rights to the portlet 1 of 2

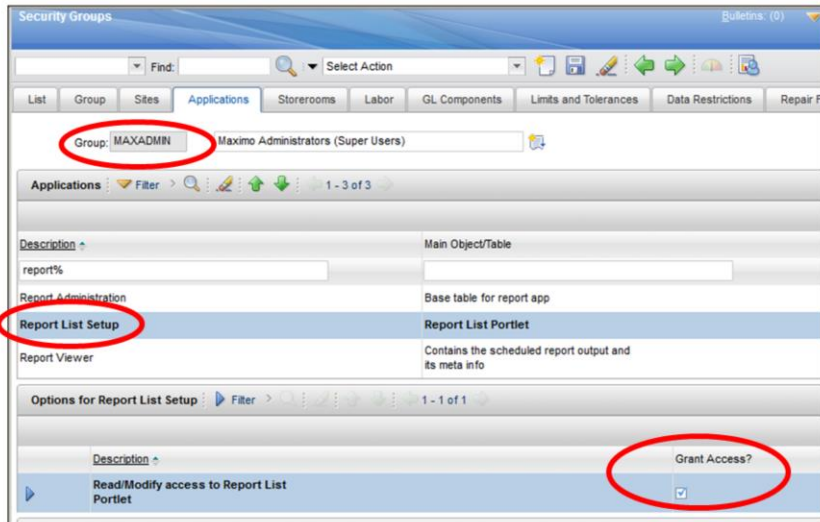
To enable the report list portlet, security rights must be granted to each security group who uses this function. To set the permissions, follow these steps:

1. Open the security group application.
2. Select the security group. On the **Applications** tab, enter **report list** in the description field.
3. When the results return, select the report list setup application, which is the report list portlet.
4. In the Read/Modify access to Report List portlet, click Grant Access and save.
5. Sign out and sign back in to refresh the settings.

Before you can use a Report List portlet on the Start Center, you must first grant proper security to the user group. To do so, you use the Security Group application. Select a security group. Select the Applications tab and filter for **report list** to find the Report List Setup application and select it. In the Options for Report List Setup section, you see Read/Modify access to Report List portlet. Check the box labeled **Grant Access**. A screen capture follows on the next slide.

Illustration of configuring security rights to the portlet

Assign privileges to the MAXADMIN group



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Before you can use a Report List portlet on the Start Center you must first grant proper security to the user group. To do this, you need to use the Security Group Application. Select the security group you desire. Select the Applications tab and filter for 'report%' to find the Report List Setup application and select it. In the 'Options for Report List Setup' section, you will see 'Read/Modify access to Report List Portlet'. Simply check the box labeled 'Grant Access'

A screen capture follows on the next slide.

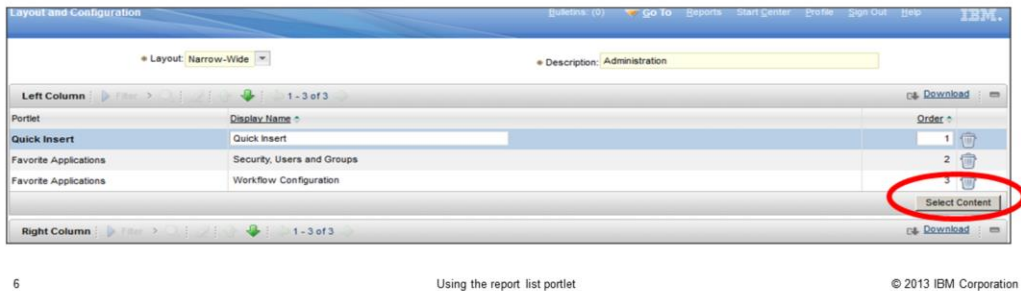
Adding the portlet to the Start Center 1 of 2

To enable the report list portlet, follow these steps:

1. Click the Change Content/Layout section of the template.



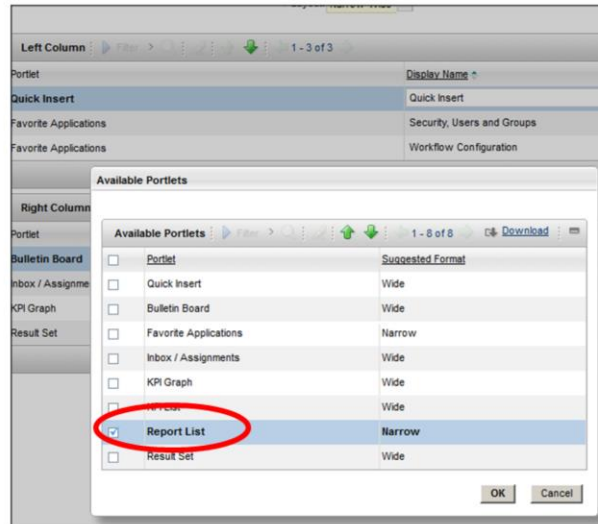
2. In the Layout and Configuration application, you can now click **Select Content** for either Left, or Right column.



Use the Change Content/Layout option in the Start Center to modify the layout of your Start Center. After clicking Change Content/Layout, you see the Layout and Configuration screen, as shown on the bottom half of this slide. You can use the Report List portlet for both narrow and wide layouts, and you can use it in the left column, right column, or both of your Start Center. This example adds it to the Left column, which has a narrow format. Click the appropriate **Select Content** button.

Adding the portlet to the Start Center 2 of 2

- From the list of available portlets, select **Report List**



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You see a window that shows all the available portlets. Select the check box beside Report List and click OK to add this portlet to your Start Center.

Adding a report to the portlet 1 of 3

1. Click the Edit icon



Initially, your portlet is empty

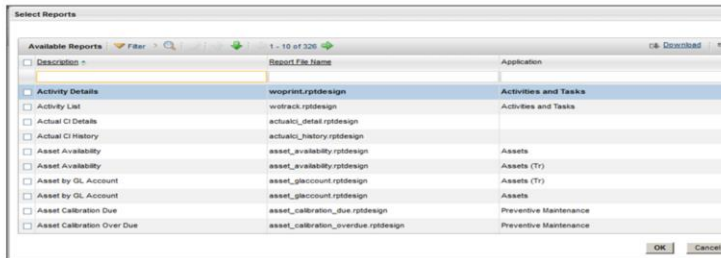
2. Click **Select Reports**



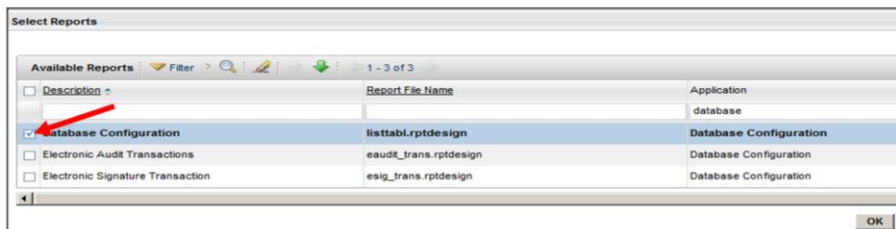
In the Start Center, you now see your portlet. Click the Edit icon to add reports to your portlet. Use the **Select Reports** button on the Report List Setup page. Select the report or reports that you want to add.

Adding a report to the portlet 2 of 3

The list of reports that show are the only reports that you have security rights to run



3. Select the report or reports and click **OK**



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The list shows all reports that you have access to. In this example, you have access to 326 reports. From here, you select the reports you want to add to the portlet. This example shows that the Database Configuration report was chosen to add to the Start Center.

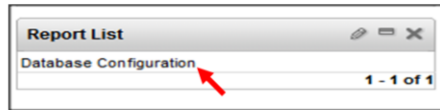
Caution about adding a report to the portlet

Do not add reports without parameters to the Report List portlet. If a report has no parameters, it runs against every record in the associated table. Maximo does not have a filter to pass to the report. This process has a serious impact on your database.

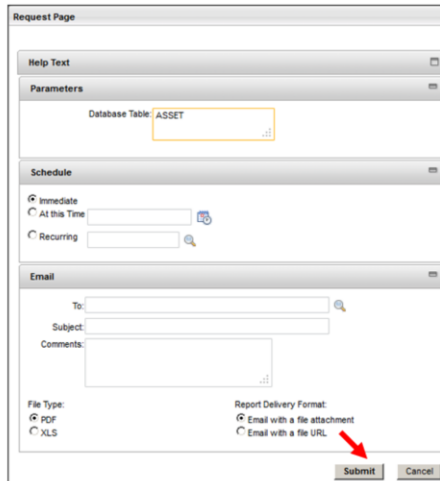
Be aware that if you add a report that has no parameters, it executes against all records in the table. There is no filter, which can have a significant impact on your database. In most cases, you use only reports that have request pages on the Report List portlet.

Running the report from the portlet

1. Click the report that you want to run



2. Complete the request page and click **Submit**

A screenshot of the "Request Page" form. It has several sections: "Help Text" (collapsed), "Parameters" (with a "Database Table" field containing "ASSET"), "Schedule" (with radio buttons for "Immediate", "At this Time", and "Recurring"), and "Email" (with fields for "To:", "Subject:", and "Comments:"). At the bottom, there are "File Type" options (PDF, XLS) and "Report Delivery Format" options (Email with a file attachment, Email with a file URL). A red arrow points to the "Submit" button.

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Run the report from the portlet by clicking the report description. The standard Maximo request page opens. Enter the required parameters and click the **Submit** button. The report opens in the Report viewer.

Summary

Now that you have completed this module, you are able to perform these tasks:

- Enable the Report List portlet in the Security Group application
- Configure security rights to the Report List portlet
- Add a Report List portlet to the Start Center
- Add a report to the portlet
- Run the report from the portlet

You can now perform all the steps necessary to add the Report list portlet to your Start Center so that you have quick access to your common reports.

You should be able to complete these steps:

Enable the Report List portlet in the Security Group application.

Configure security privileges to the portlet.

Add a Report List portlet to the Start Center.

Add a report to the portlet.

Run a report from the portlet.

Useful Links

- Maximo Landing Page:
<http://www-1.ibm.com/support/docview.wss?uid=swg21418666>

- BiLog: Report List Portlet
<http://ibm.co/otod3K>

- Reporting Feature Guide
V 7.1 - <https://www-304.ibm.com/support/entdocview.wss?uid=swg21305020>
V 7.5 - <https://www-304.ibm.com/support/entdocview.wss?uid=swg21498433>



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