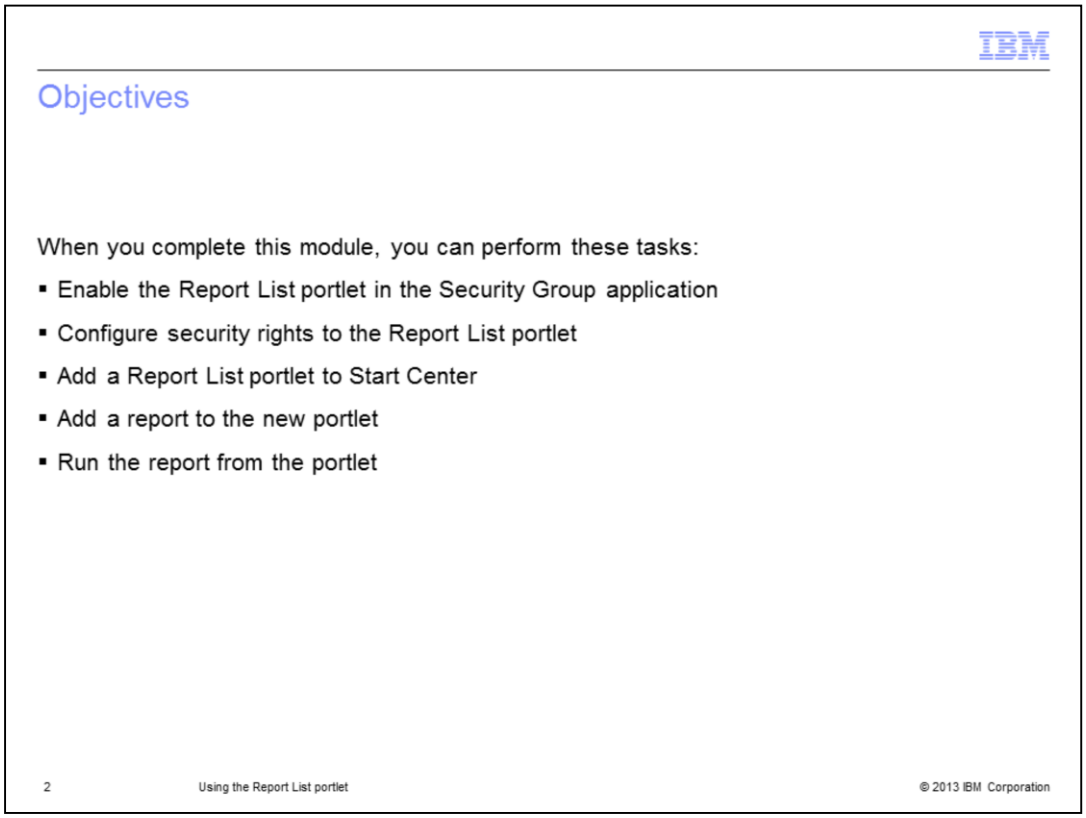
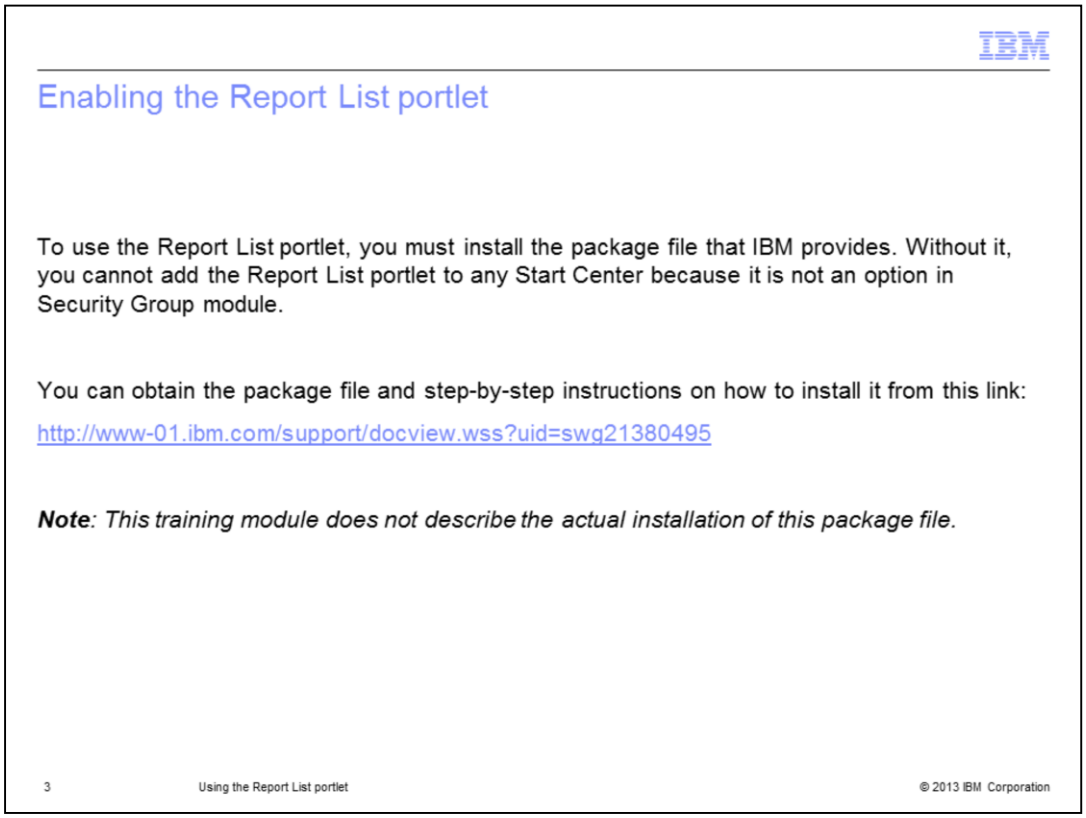
In this training module, users of Maximo® Asset Management V7.1.1.4 and higher and Maximo V7.5.1 and higher learn how to set up and use a Report List portlet on Start Center.

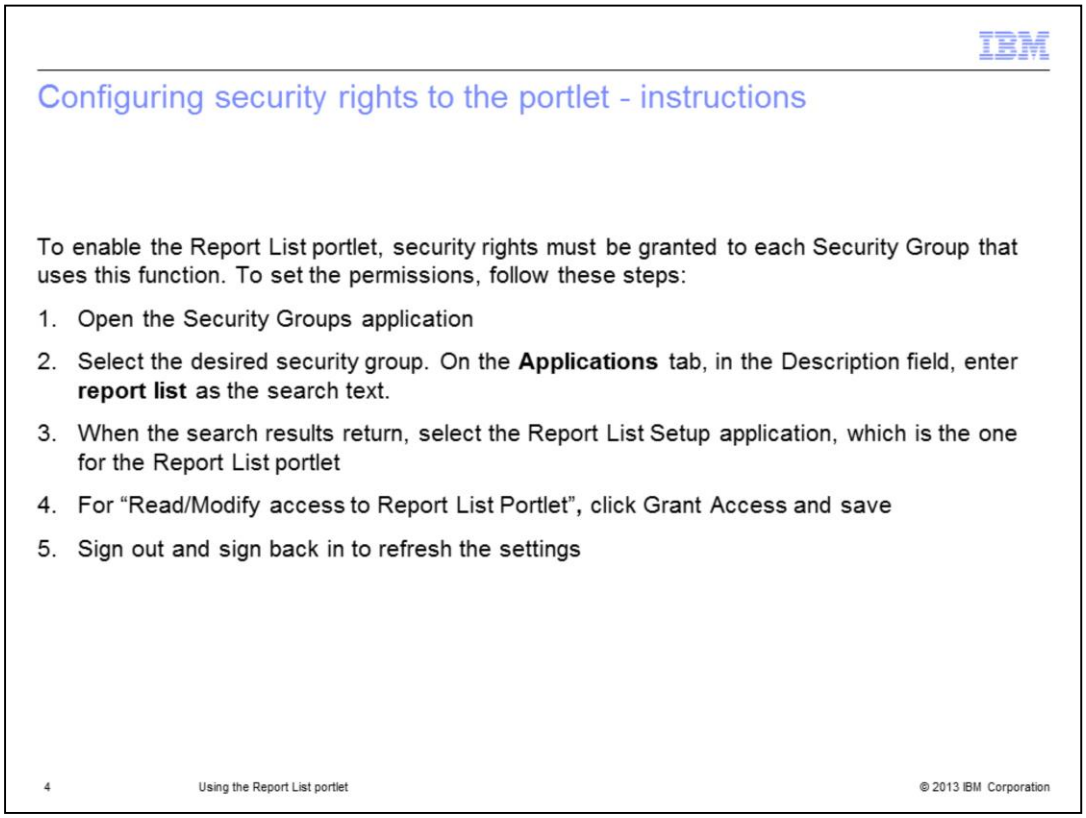


When you complete this module, you can perform these tasks. Configure security rights to the Report List portlet. Add a Report List portlet to Start Center. Add a report to the new portlet. Run the report from the portlet.



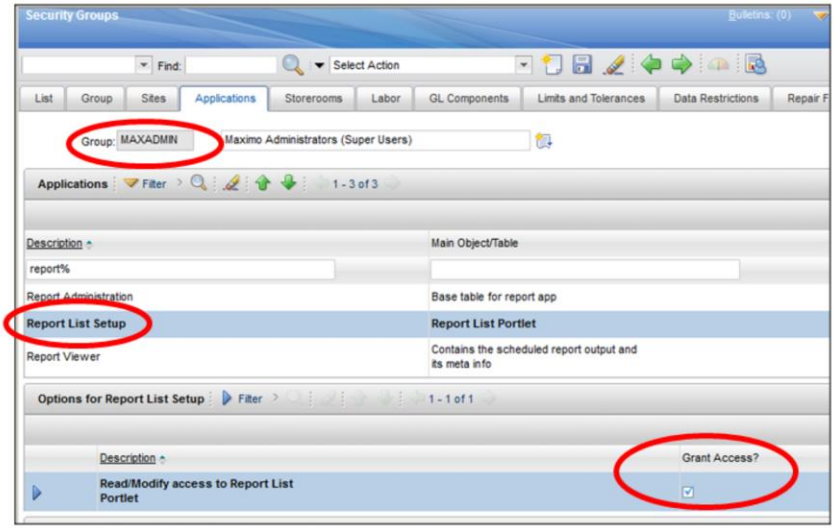
The first thing required, before you can assign security to the portlet, is to enable the portlet in the Security Group application. You must download a separate package file from the Support site and install it on the Maximo server. This package file and installation instructions are found at the web 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.



Before you can use a Report List portlet on Start Center, you must first grant proper security to the user group. The steps are described on this slide and a screen capture is provided on the next slide.

Configuring security rights to the portlet – screen capture



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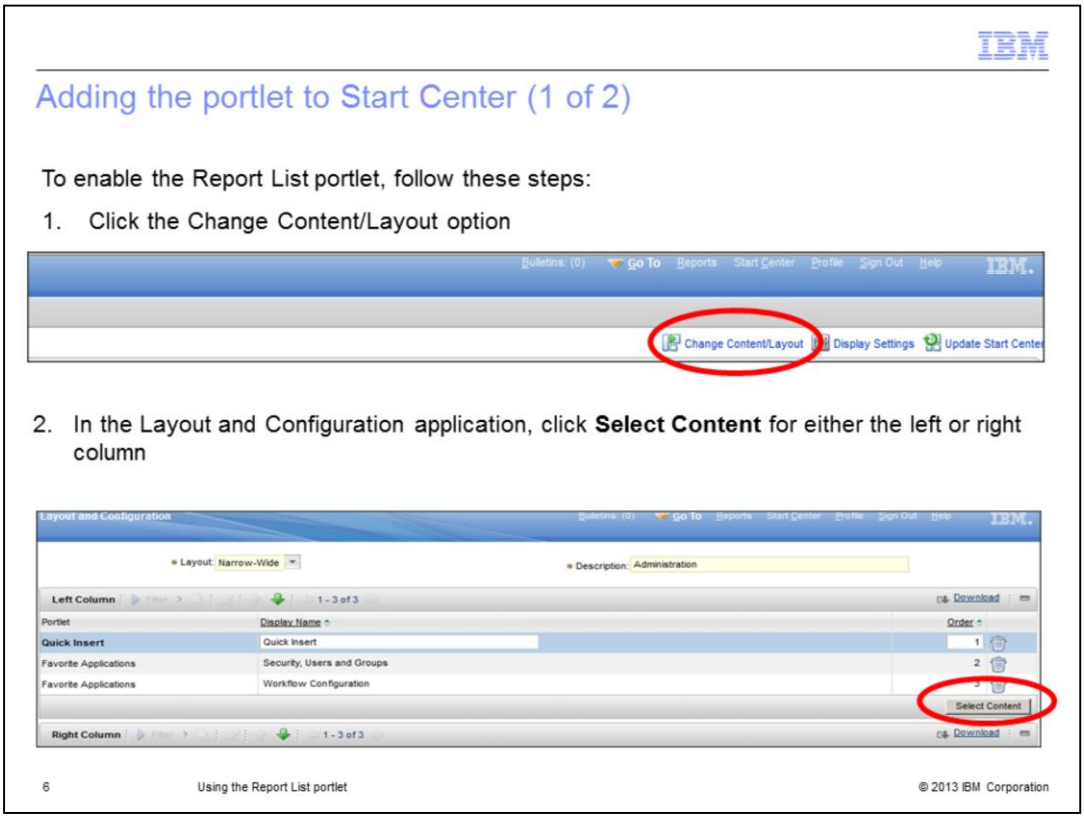
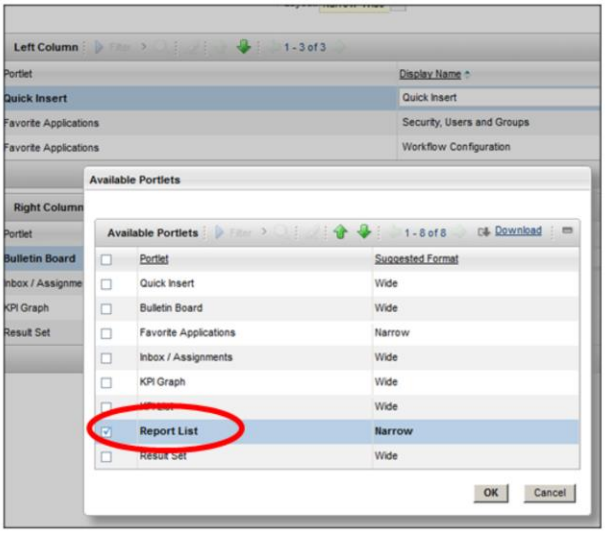
This is a screen capture of the Security Groups application. In this example, in the Group field, the MAXADMIN group was chosen. On the Applications tab, in the Description field, the filter string ‘report%’ was used. In the search results, the Report List Setup application was selected – this is the one for the Report List portlet. In the ‘Options for Report List Setup’ section at the bottom of the screen, there is ‘Read/Modify access to Report List Portlet’. Check the box labeled ‘Grant Access’. Then save and log out and back in to refresh your settings.



To add the Report List portlet to Start Center, click the Change Content/Layout option, as shown on the top half of this slide. This launches the Layout and Configuration screen, as shown on the bottom half of this slide. You can use the Report List portlet in either a narrow or wide layout and you can use it in the left column, right column, or both of your Start Center. In this example, the portlet is added to the left column, which has a narrow format. Click the **Select Content** button for the column where you want to add the portlet.

Adding the portlet to Start Center (2 of 2)

3. From the list of available portlets, select **Report List**



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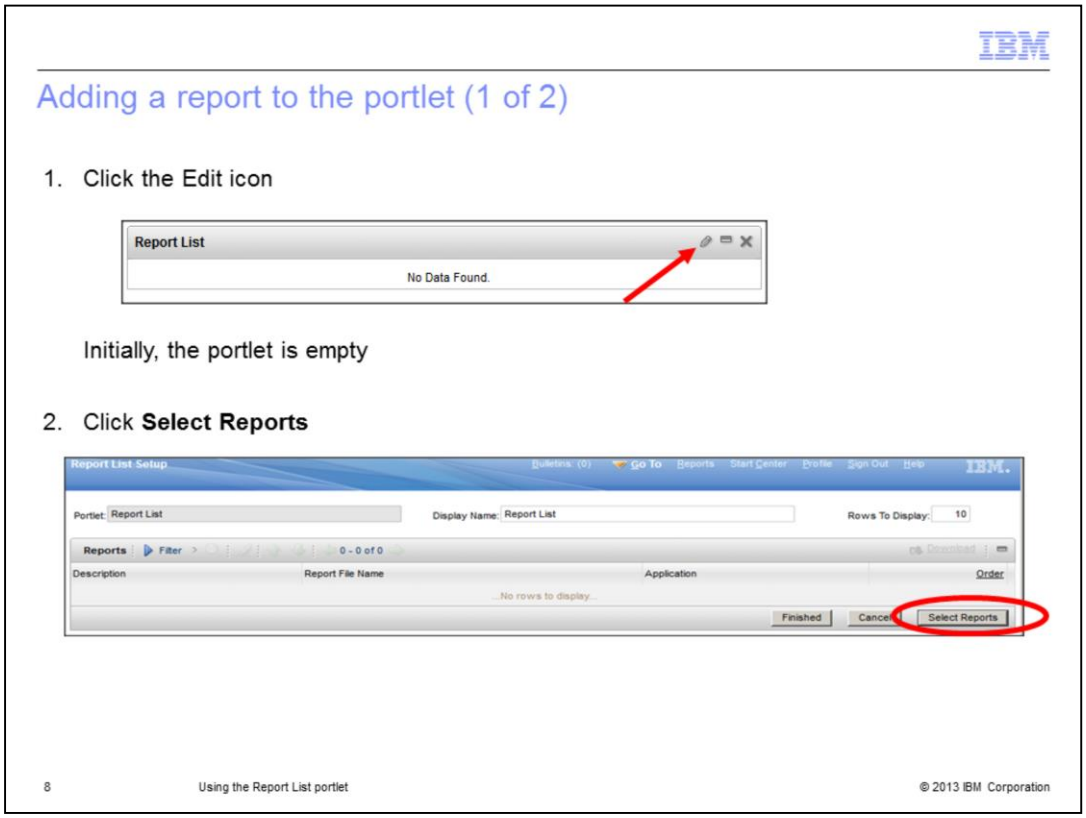
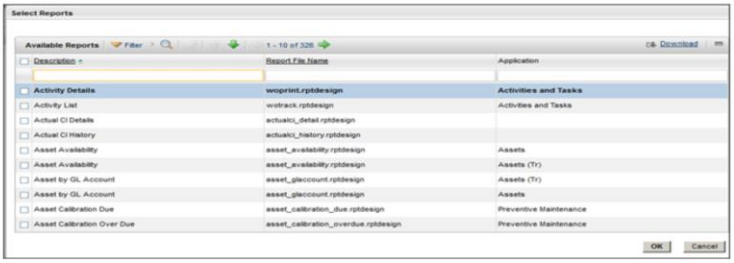
This launches a window containing the list of available portlets. Check the box for Report List and click OK. You have now added this portlet to your Start Center.



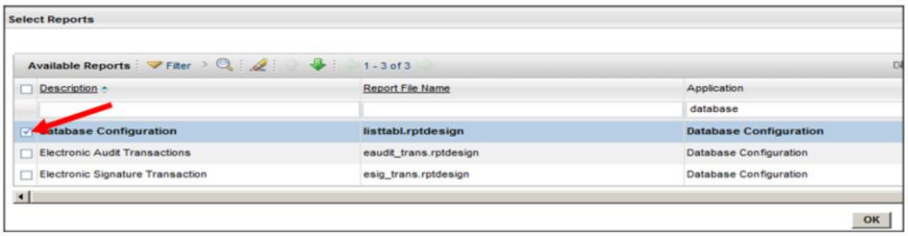
Now that the Report List portlet appears in Start Center, you can add reports to it. Click the Edit icon, which looks like a pencil. On the Report List Setup page, push the **Select Reports** button.

Adding a report to the portlet (2 of 2)

The list contains the reports that you have the security rights to run



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



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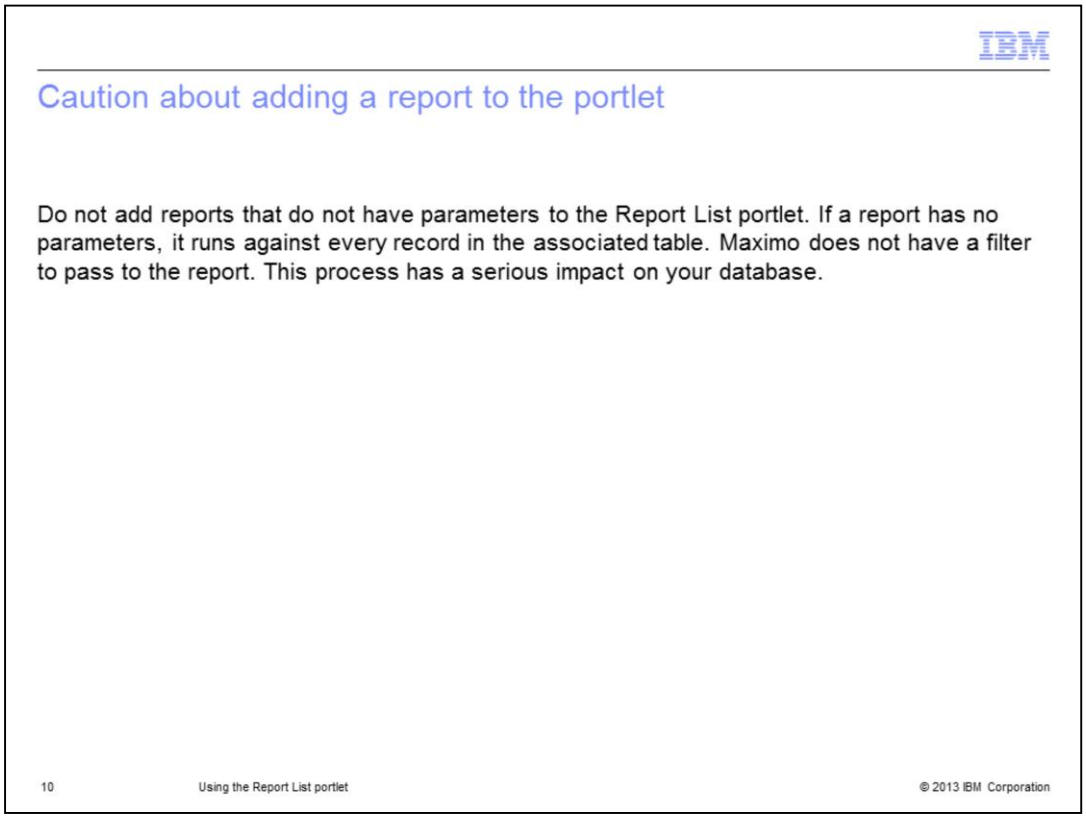
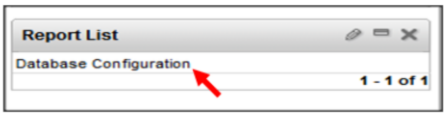
The list contains all of the reports that you have access to. In this example, you have access to 326 reports. Select the reports that you want to add to the Report List portlet. In this example, the Database Configuration report was chosen.



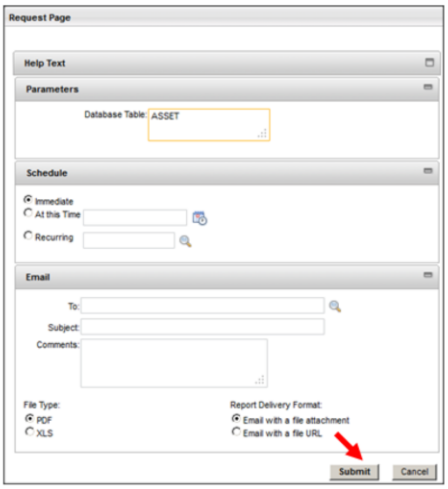
Be aware that if you add a report that has no parameters, it runs against all records in the table, which can have a significant impact on your database. In most cases, for the Report List portlet, you only want to select reports that have request pages.

Running the report from the portlet

1. Click the report that you want to run



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



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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.

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

There are five steps. Enable the Report List portlet in the Security Groups application. Configure security privileges to the portlet. Add the Report List portlet to Start Center. Add a report to the portlet. Run a report from the portlet.

For more information, see these pages.

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