Crystal Enterprise 10 SharePoint Portal Integration Kit

Parameters and the Binding Feature

BUSINESS OBJECTS®

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Audience: This document is intended for Information Consumers
and Web Site Creators who want to know how to work with
parameters and use the binding feature of the integration kit.

Contents

Parameters

The reports that you choose to view may contain parameters, which prompt you to enter information. The information that you enter or the way that you respond determines what appears in the report.

For example, a report may contain a parameter that prompts you to choose which view of the report to display: a view that contains data for the current month or a view that contains data for the entire year. By specifying a value for the parameter, you decide which view of the report is displayed on the web part.

Prompt types

Depending on how a report is designed, the parameters may prompt you to provide your own values or select from a given set of values. You may find parameter prompts on the web part toolbar or in separate areas underneath the toolbar.

The following list provides examples of the different types of parameter prompts that you may see in a report:

- **Selection List**
  In a selection list prompt, you are required to choose a value for the parameter from a predefined list of values.

- **Input Field**
  In an input field prompt, you are required to enter a value in a field for the parameter. The report is displayed based on the value that you provide.

- **Adjustable Selection List**
  In an adjustable selection list prompt, you have two options: you may choose a value from a predefined list, or you may enter a value of your choice. This prompt type combines the features of the selection list and the input field prompts.

- **Calendar**
  In a calendar prompt, you are required to choose a value from a calendar. This type of parameter prompt is usually present in reports that contain date-related information.

- **Range**
  In a range prompt, you are required to provide values for a specific range of data in the report. Depending on how the parameter is configured, the values may either be selected from a list or entered based on your preference.

Sending Prompt Values Between Web Parts

If you are the Web Site Creator or the person who is responsible for deploying the web parts in a SharePoint system, you may configure the web parts on a portal page to send (or receive) prompt values from other web parts.
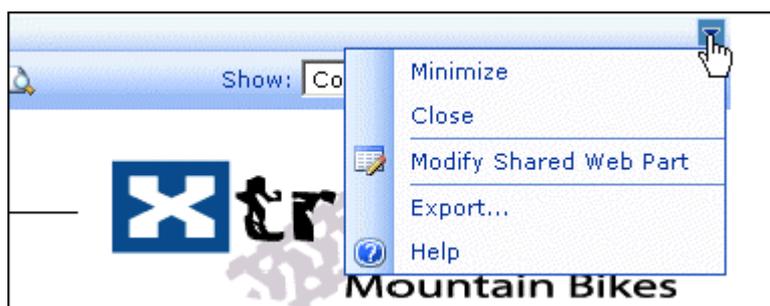
Prompt values refer to the values that you specify for the parameters in a report. If you have two or more Report for You[1] web parts on a page, you may configure the web parts to interact so that the values that you choose for the parameters in one web part become the values that are used for the parameters in another web part.

For example, suppose that you have a page that contains two web parts: the first web part displays a report that shows your company's sales worldwide, and the second web part displays a report that shows your company's employees worldwide. Both reports have a parameter named Country, which allows you to limit the information that is displayed in the report by country.

If you configure the first web part to send its prompt values to the second web part, then the value that you choose for the Country parameter in the first web part is automatically used for the Country parameter in the second web part. As an example, if you select the value "Canada," then the first web part will display a report that shows your company's sales in Canada. Accordingly, the second web part will also display a report based on the value "Canada"—the report will show a list of all the company's employees in Canada.

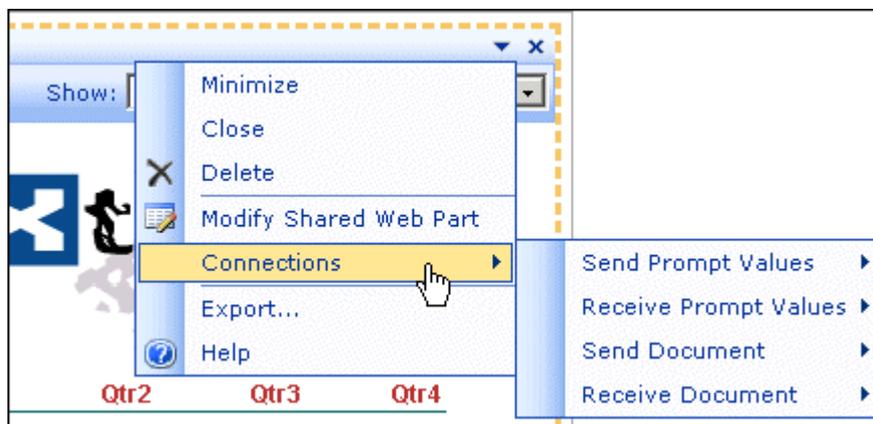## To configure a web part to send prompt values

1. Open your web browser and navigate to a SharePoint portal page that contains two or more Report for You web parts.

2. In the Actions area, click **Edit Page**.
   The page reloads in Edit mode.

3. On the upper-right corner of the first web part, click the **Web Part Menu** arrow.
   The Web Part menu appears.

4. Select **Modify Shared Web Part**.
   The Report for You web part is outlined with a broken yellow line.

5. Click the **Web Part Menu** arrow again.
   The Web Part menu appears with a new option: Connections.

6. Click **Connections**.
   The menu expands and displays four options.

7. Select **Send Prompt Values**, and click the name of the second Report for You web part.

The first web part is now configured to send prompt values to the second web part. Conversely, the second web part is now configured to receive prompt values from the first web part.

You still need to specify which parameters in the report will accept the values that are sent to them. To do this, you must modify the binding feature of the parameters in the second web part. For information on how to modify the binding feature of a parameter, see "Filtering Reports by User Profile Properties" on page 5.

Filtering Reports by User Profile Properties

Typically, binding is used to determine what value appears as the default value for a parameter prompt. (The default value is the value that is automatically specified and used for the parameter unless you specify a different value.)
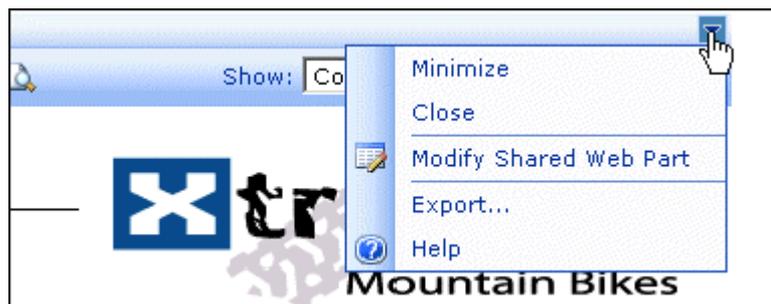
For example, if your report contains a Day of the Week parameter and the binding is set to the custom default value "Wednesday," then "Wednesday" will automatically be specified in the prompt when you view the report. You may use this value to run your report, or you may specify a different value.

Web Site Creators can modify the binding of a report parameter to use one of the following values:
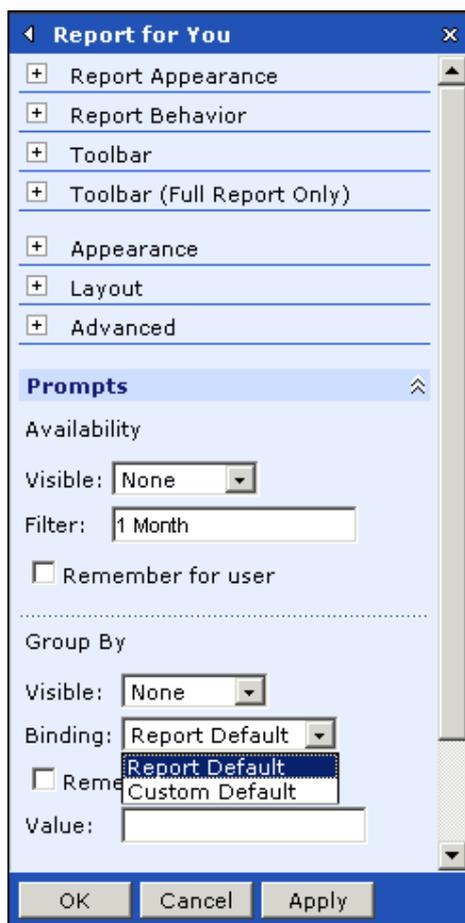
- The default value that was specified by the report writer.
- A custom value of their choice (for example, "Wednesday").
- An empty custom value, which enables the parameter to receive prompt values that are sent to it from another web part.

To set the binding of a report parameter

1. In the Actions area of the page, click **Edit Page**.
   The page reloads in Edit mode.

2. On the upper-right corner of the web part, click the **Web Part Menu** arrow.
   The Web Part menu appears.

3. Select **Modify Shared Web Part**.
   The Properties pane opens on the right side of the page.

4. In the Prompts section, specify the binding of the report parameters by choosing a value from the Binding list:

   ▪ Select **Report Default** to specify the default value that was originally set by the report writer.
   ▪ Select **Custom Default** and specify your own value(s) in the field(s) underneath the Binding list.
   ▪ Select **Custom Default** and leave the value field(s) underneath the Binding list empty to allow the parameter to receive prompt values.
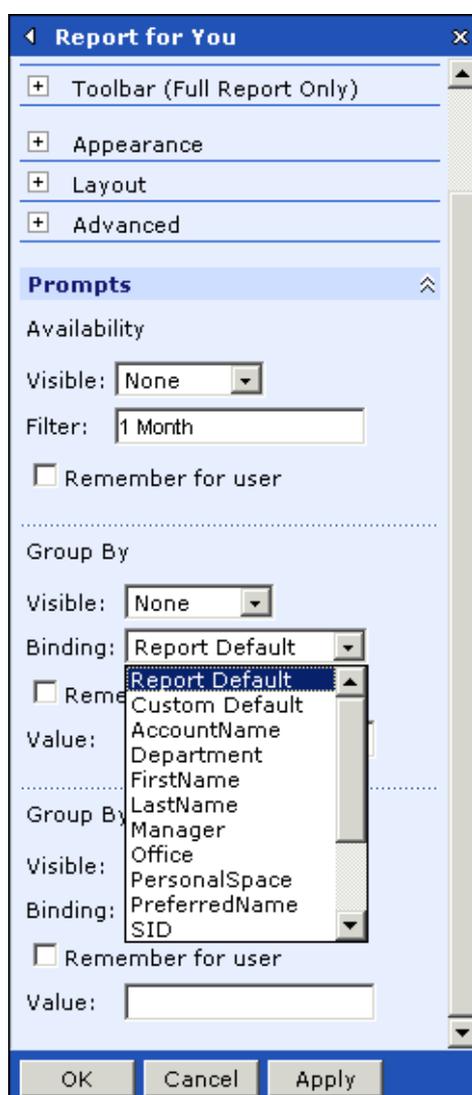
     Note: If the web part is configured to receive prompt values *and* you specify Custom Default values, the prompt values that are sent to the web part will override the values that you set.

5. Click **OK**.

Additional binding features

If your system is a Windows SharePoint Services deployment, the parameter binding options that are available to you are Report Default and Custom Default. However, if you have an Office SharePoint Portal Server 2003 deployment, you may be able to select additional binding options.

As a result of the extended features of Office SharePoint Portal Server 2003, you can bind your report parameters to the profile properties of your Information Consumers. You may, for example, bind parameters to user names so that the parameters in the report change depending on the user name of the person who views the report.

Note: You can use the additional binding features for report parameters that use only a single value. You cannot, for example, bind the "FirstName" option to a range parameter (which typically requires two values.)

For more information about the additional binding features in Office SharePoint Portal Server 2003, contact your SharePoint system administrator.

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[1] You may also use custom-built web parts as long as they are configured to display Crystal reports and they are able to send/receive prompt values.

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