Report Actions

Report Actions run reports directly from records, using the information from the record as a run-time input.

Example

For example, you could add a Report Action to an action button in the Service Requests table that runs a report on the service request's associated tasks. When a user clicks Run Report, the service request is passed in automatically and the user doesn't see the run-time input at all.

Create a Report Action

You can access the Actions wizard in several ways, but the easiest way is to select Setup [Table] from the table where you want to create the action.

1. From the top nav bar, expand the table's drop-down and select Setup [Table].
2. Select the Actions tab in the Table wizard.
3. Click Create Report Action.
4. Give your action a name and description.
5. Select the type of report, either table-specific or combined.
6. Either select an existing report from the drop-down list or create a new one. You can also use the Edit button to make changes to an existing report once you select it.

   It's best to use reports with run-time filters when your report action will be used in an Action Button. This way, when a user clicks the Action Button from a record, that record is automatically passed in to the run-time filters behind the scenes, and the user sees a report tailored to the context of the record.

7. Choose how you want the output to appear. You can show the report in a new window or browser tab, or you can attach the report as a file to another field.
8. Choose which permissions you want to use. You can use the permissions of the user clicking the button, or select a user from the drop-down menu and always apply that user's permissions.
   Tip: If you're using the report action in a rule, it's best to select a user whose permissions will be used each time.
9. Click Finish.