Guidelines for Choosing Reports for Form Designer

Description

Two wiki's in this section help agencies and implemention teams determine what reports and documents they can create in **Accela Ad hoc Reporting**. [[Guidelines for Choosing Reports for Ad hoc Report Writer]] describes the reports that can be created using the basic **Ad hoc Report Writer**, available with Accela Automation 7.2 FP2.

The wiki below describes the additional types of reports and documents that may be created with **Form Designer**. **Form Designer** is an add-on for **Accela Ad hoc Reporting** available in Accela Automation 7.3.

Report Characteristics

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Report Characteristics

Layout

1. Letter, permit, notice, license, certificate, document, form (refered to collectively as "forms").

    - Content may be organized in paragraphs, tables, in frames, or a combination of these.
    - Specific fonts, font sizes, and font styles may be used.
    - Any layout or formatting that can be done using HTML can be done in Form Designer. [Note 1]
    - Subreport(s) may be embedded. Subreport must be linked to the main report by a common field.
    - Form may be repeated for each Record found, e.g., a separate copy of a letter may be automatically generated for each Record selected by parameters. This is best in PDF. [Note 2]

2. Desired output file format is PDF, Word, or Excel.

    - Report formatting in Word or Excel output may not be rendered exactly as designed. Page breaks and page numbers aren't exported to Word or Excel. [Note 3]
    - Forms whose text must be edited after form is generated may be exported to Word. Simple letters, forms or documents printed for a single Record are best suited for this. [Note 3]

3. Form may use basic Grouping/Detail structure.

    - Example: Inspection result notices that contain record and inspection info (Group) with list of failed guideline items (Detail).

4. Form may contain one or more tables with variable rows.

    - ASIT tables may be displayed.

5. Form may contain one or more images that are accessed from an external URL or the Ad hoc Reporting server. [Note 4]

6. Form may use a letterhead or shared letterhead. [Note 5]

7.   Page 2+ header that differs from Page 1 header is not required.

8.   Page footer is not required.

9.   Conditional formatting is not required.

10.   Duplex printing (on both sides of paper) of variable-length forms is not required.

Data

1.   Form shows Record and/or transaction details in form or tabular format.

   - Comma-delimited list of field values not possible. [Note 6]

2.   See Report Characteristics > Data > items 2 - 7 in [[Guidelines for Choosing Reports for Ad hoc Report Writer]] for other data characteristics for **Form Designer**.

Parameters & Filters

See Parameters & Filters in [[Guidelines for Choosing Reports for Ad hoc Report Writer]].

Usage Characteristics

A simple form (e.g. letter, permit, document, etc.) should be created in Accela Ad hoc Reporting if the following objectives are desired:

1.   Non-technical staff can quickly create and deploy simple forms

   - Staff can begin creating simple forms with minimal training.
   - Knowledge of AA database schema not required.
   - Technical support from IT staff not required.

2.   Users can easily copy and modify the simple forms to meet their own needs. For example,

   - Add / remove fields.
   - Change filters and parameters.
   - Simple layout/format changes.

3.   Users can open a Record ID in Accela Automation directly from a hyperlink in the report

   - By default, all Record ID's in forms are hyperlinks ("deep links") that open the Record in Accela Automation. When users click on a Record ID in an Ad hoc Report, they can view or edit the Record in Accela Automation.

Reports That Cannot be Created with Form Designer

Form Designer cannot be used for the report types below.

1.   Summary, management, analytical, metrics, or performance reports that have one or more of the following: [Note 7]

   - Summary values that are derived from rules, or from aggregation functions other than simple Count, Count Distinct, Sum, Average, Minimum, Maximum.
   - Complex calculations or rules.
   - More than one set of criteria, or multiple line items each using different rules/criteria.

- Parameter or filters against calculated, summarized, or derived values.
- Process very large volumes of data.

2.　Forms generated in Word or Excel that require detailed and precise control over outputed fonts and format, automatic page numbering, page header/footer sections.

3.　Forms that require complex data models, e.g., complex parameters and filters, complex rules.

4.　Batch forms/letters generated in very large quantities at a time.

5.　Forms that must be created in one Accela Automation envrionment and migrated to another Accela Automation envrionment.[Note 8]

Notes

1.　Source code for forms is in HTML.　**Form Designer** allows direct editing of the HTML source code. Forms may be designed in an external HTML/web editor and inserted into Form Designer by copying and pasting the HTML source code.　This allows complex layouts to be developed by users with HTML proficiency.

2.　If page breaks are required between repeated forms:

- Output file format must be PDF.　Page breaks aren't inserted in Word-editable form output.
- A blank page is inserted at the beginning or end of the forms.
- The global report header logo always appears on the top of the first page only, unless the global report header logo is removed from all Ad hoc Reporting reports, whether tabular or form.
- A form-specific image/logo may be added to appear on each repeated form.　This image/logo must be accessed from an external/public URL or the Ad hoc Reporting server. The image/logo doesn't render correctly when form is exported to PDF.　This issue will be corrected in AA 7.3.1.

3.　The following aren't exported into forms rendered in Word or Excel: Manual page breaks, automatic page numbering, or page headers/footers.　Paragraph indentations are rendered in Word within table structures, not as tabs or hanging indents.

4.　One or more Images or logos in PNG file format may be added to the form.　The image/logo file must be accessed from an external/public URL or the Ad hoc Reporting server.　In Accela Automation versions prior to 7.3.3, the image/logo doesn't render correctly when form is exported to PDF.

5.　A letterhead may be inserted to a form or repeating form.　The letterhead may contain a logo (see Notes 2 and 4).　The letterhead cannot pull data from Standard Choices.　Letterhead text must be hardcoded.　A large space always appears above the letterhead. The letterhead may be pulled from a shared subreport that is used by multiple forms.

6.　If comma-delimited list of values is needed, it must be added to a custom view.　Custom views are advised only for lists that are used in multiple reports.　Such lists should not be used in parameters or filters.

7.　Analytical, summary, management, metrics, or performance reports are best created using Crystal Reports or SQL Server Reporting Services (SSRS), as well as agendas and mailing labels.　These reporting platforms provide advanced features for complex rules and aggregation, better control over query performance, and advanced formatting options.

8.　An enhancement is planned for Data Manager in Accela Automation 8.0 to allow **Ad hoc Reporting** reports created in one AA environment to be migrated to another AA environment without the need to re-create the reports.

Version Number

Products

File