

## How To Add Hyperlinks to Reports

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In Axys 3.3, Advent added hyperlink functionality in Axys Reports. If you run a Performance Report, for example, you see that the portfolio name field is a hyperlink (designated by the blue color), as are the Contributions, Withdrawals, Realized Gains, Unrealized Gains, Interest, Dividends, and Fees lines. Clicking on any one of these blue hyperlinks will launch another Axys Report. The specification of which report should be run when you click on a link is contained within the definition of each hyperlink (which is contained in the report code).

In this article, we will show you how to add hyperlinks to your Report Writer Pro reports. We will use a combination of Report Writer Pro and Replang to define hyperlinks within a sample report. We will add a hyperlink to the Change in Market Value report. The hyperlink will run the Date-To-Date Gain Loss report. Continuing in our tradition...if you have a desire to do some programming, start up Report Writer Pro, start up your text editor and read on.

1. Before we get started with Report Writer Pro, we need first to record a macro that will be used by our hyperlink. As stated, our intent is to define a hyperlink in the Change in Market Value report which will call the Date-To-Date Gain Loss Report. The first step, then, is to record a macro that will run the Date-To-Date Gain Loss report. Do this now and save it as `_dt2dt.mac`
2. In Windows Explorer, find your `_dt2dt.mac` file and rename it to `_dt2dt.smc`.
3. Move the `.smc` file into the directory specified by your `$pathsmc` setting (usually `\axys3\smc\`). \*.smc macros are System Macros, which is how Axys designates macros used in drilldowns versus your normal Axys report macros.
4. In Report Writer Pro, create a new report using the Change In Market Value template

| CHANGE IN MARKET VALUE           |                             |                                      |                               |                   |                             |
|----------------------------------|-----------------------------|--------------------------------------|-------------------------------|-------------------|-----------------------------|
| <i>From 12-31-02 To 03-31-03</i> |                             |                                      |                               |                   |                             |
| Portfolio                        | 12-31-02<br>Market<br>Value | Additions<br>Withdrawals<br>Expenses | Interest<br>Dividends<br>Fees | Gains<br>Losses   | 03-31-03<br>Market<br>Value |
| Test Client                      | 2,026,145.20                | 20,701.80                            | 415.12                        | -47,529.33        | 1,989,732.79                |
|                                  | <b>2,026,145.20</b>         | <b>20,701.80</b>                     | <b>415.12</b>                 | <b>-47,529.33</b> | <b>1,989,732.79</b>         |

5. Save your Report Writer Pro report. I saved mine as `_chgmw.rpw`. In Windows Explorer, copy `_chgmw.rpw` to `_chgmw.rep`. Now we have a `.rep` file we can edit without affecting our original `.rpw` file
6. Open `_chgmw.rep` in your favorite text editor. It should look something like this:

```

K:\Axys35\rep\_chgmw.rep
1 ;Axys Report Writer Pro Version 1.0.0.272
2 ;Report class RECON (management-summary)
3 ;Fixed width
4 management
5 call a define constants
6 ;Dialog
7 ;Set custom dialog text
8 $_asdtxt This report displays a portfolio's beginning market value, all additions, withd
9 r
10

```

7. Add line 45 as shown below

```

42 ;PAU now handles footer, so no foot..foot
43 ~~~~~
44
45 call z set up for drilldown
46
47 pbreak

```

8. Add the following subroutine at the very end of the report (just above the “trailer” statement).

```

315 ; -----
316 label z set up for drilldown
317 ; -----
318 ; --- First DrillDown ---
319 $drill1 drill1
320
321 ; (D)efinition
322 template D $drill1
323 .<AppCommand Caption='Date to Date Gain Loss' Type='Axys Report' Cmd='rep32 -m_dt2dt.smc
324 template
325
326 ; -- Portfolio Link ---
327 $link1 link1
328 template D $link1
329 .<Context Caption='%1'><Portfolio PortfolioID='%2' /></Context>\h
330 template
331 return
332
333 trailer

```

The full text of line 323 (cut off in the picture above) is:

```

.<AppCommand Caption='Date to Date Gain Loss' Type='Axys Report'
Cmd='rep32 -m_dt2dt.smc -p%1 \034-b%2 \%3\034 -t -J -x -su -z
\034-l$fx \%4$name11 \%5\$_sens $_sens\034' />\h

```

In essence, this line is the same as the line you would use in a script file to call a macro and pass it two dates. The \034 in the line is equivalent to a quotation mark. In a script file, you would call a two date macro using the command

Rep32.exe -**m**macroname -**p**portcode “-**b**date1 date2” which is what the command above is doing. The extra parameters are:

- J defines the last report run as the report run from the Reports Menu, not any report run from a drilldown
- x tells the drilldown report to run without displaying any dialog box
- su tells Axys to leave the drilldown report window open after running the report
- z tells the drilldown report to inherit settings from the original report, not from any subsequent drilldown report (important when the user drills down several levels)

The last line of the AppCommand statement passes the reporting currency, the portfolio name, and other report settings from the original report to the drilldown report. Hang in there, we’re almost finished!

9. move the “dosens” statement from line 13 down to line 30...and add \$\_sens after the “dosens”

```
29 END
30 dosens $_sens
31 fxmax n
32 fupr $fu
```

10. find the print line at line 233. The original print line is all one line. (subb1, subb2, subb3, subb4, subb5 all on the same line of code). We want to turn the “Gains” column into a hyperlink. The Gains column is the next-to-last column (subb4). Place your cursor just after the subb3 and hit enter to insert some blank lines. Insert the following section of code (lines 234 to 251) and then add a period before the subb4 in line 252 as shown below.

```
233 .~$21_ntc0#~8subb1#~2subb2#~2subb3
234 ; -----
235 ; establish parameters and write drilldown link to report.
236
237 ; check for consolidation
238 $_file $:file
239 if $:gnum "0" =#!
240     cut $_file gname8$:gnum
241     $_file $$_file
242
243 if $name "" =#!
244     cut $temp $drill1=$_file,%1date1,%1cutdate,$:rcurr,$name
245     xmlescape $temp
246     .$$*temp
247     cut $temp $link1=Portfolio Object,$_file
248     xmlescape $temp
249     .$$*temp
250
251 ; -----
252 .#~2subb4#~8subb5\n
```

All done. Save your rep file and run it. Your new report will display a hyperlink in the gains column of the change in market value report. When clicked, the hyperlink will run the Date to Date Gain Loss report for the correct portfolio and date range.

As usual, get this report, and others, by visiting the “Free Downloads” section of our website, [www.cssi.org](http://www.cssi.org).

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**About the author:** Diane Herrera is president of Client Server Specialists, Inc, a software and consulting firm located in King of Prussia, PA. CSSI specializes in getting data into and out of the Axys system, and in developing custom applications that communicate with Axys. CSSI also develops custom Axys reports and teaches classes in Replang, Advent’s Report Writing Language. E-mail: [dherrera@cssi.org](mailto:dherrera@cssi.org). Phone: 610-992-9287.