

IRIS Custom Report Step by Step Tutorial

Contents

- Introduction 1
- Create a Basic Report..... 1
- Create a Summary Report..... 4
- Create a Pivot Table Report 6

Introduction

Instruction to create a Basic Report, Summary Report and Pivot Report.

- 1. Go to IRIS Custom Reports
- 2. Click the New button

Also, note the Custom Report Data Dictionary is a key resource for report creation and may be found at www.irisweb.org. There are also additional Custom Report reference material as well as many self-guided training videos at the same web site.

Create a Basic Report

- 3. **Select the data source**



Reports + New

DATA SOURCES FIELDS SUMMARY CHART MISC STYLE FILTERS PREVIEW

Report List | New | Save | Save As... | Print | Results 100

Distinct

Recent Data Sources

...

<input checked="" type="checkbox"/> IRIS_CASE	<input type="checkbox"/> IRIS_CASETRANSFER	<input type="checkbox"/> IRIS_INDIVIDUAL
<input type="checkbox"/> IRIS_USTIE		

IRIS Logs

<input type="checkbox"/> IRIS_EMAILARCHIVE	<input type="checkbox"/> IRIS_ERRORLOG	<input type="checkbox"/> IRIS_EXECUTIONLOG
<input type="checkbox"/> IRIS_IZENDALOG		

Advanced Continue to Fields

4. Add fields Affiliate, Nationality, Case Number, Case Size, and Arrival Date

Field	Description	Sort VG	A	Function	Format
Affiliate	Affiliate	<input type="checkbox"/>	<input type="checkbox"/>
Nationality	Nationality	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CaseNumber	Case Number	<input type="checkbox"/>	<input type="checkbox"/>
CaseSize	Case Size	<input type="checkbox"/>	<input type="checkbox"/>	...	0,000
ArrivalDate	Arrival Date	<input type="checkbox"/>	<input type="checkbox"/>	...	8/12/2015
...		<input type="checkbox"/>	<input type="checkbox"/>

Add Subtotals

5. Click the **Preview** button and note the results

6. Click the **Save As** button and give the report a name “Basic Report – [Last Name]”. For example, “Basic Report – Smith”

7. **Experiment with sort and filter**

Create a Summary Report

8. **Return to the Fields tab and set the following settings**
 - a. Arrival Date and Affiliate: remove this field
 - b. Nationality: Function = Group
 - c. CaseNumber: Function = Count
 - d. CaseSize: Function = Sum
 - e. CaseNumber: Description = "Cases" (This is the label for this column in the report)
 - f. CaseSize: Description = "Individuals"

The screenshot shows the 'Reports + New' interface with the 'FIELDS' tab selected. The 'DATA SOURCES' tab is also visible. The interface includes a toolbar with options like 'Report List', 'New', 'Save', 'Save As...', 'Print', and 'Results' (set to 100). Below the toolbar, there is a 'Records' field and a table for configuring fields.

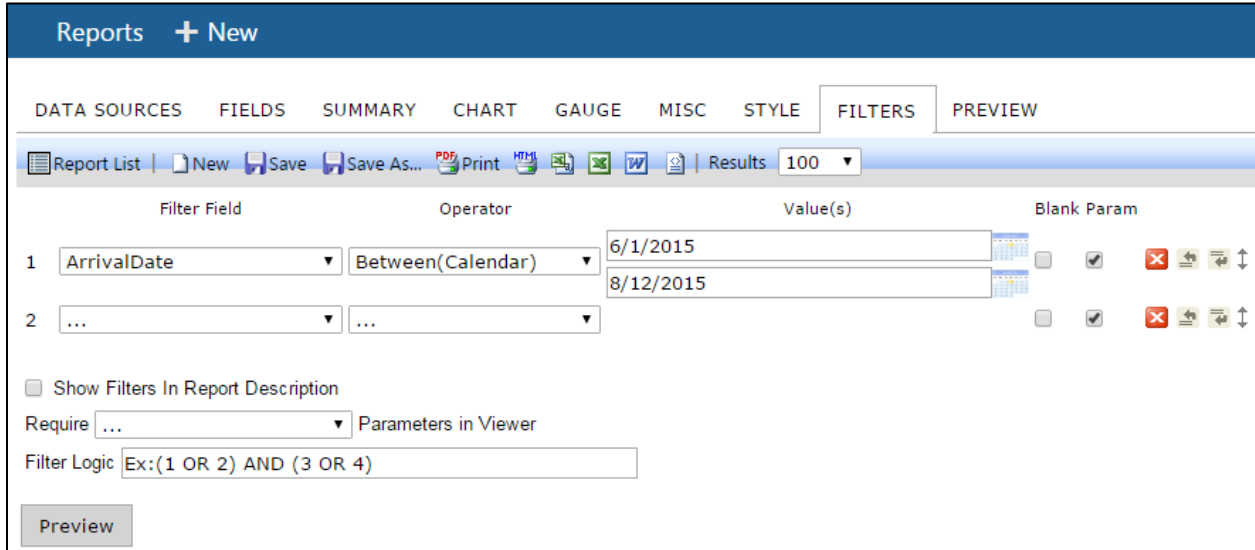
Field	Description	Sort	VG	A	Function	Format			
Nationality	Nationality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Group	...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CaseNumber	Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Count	0,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CaseSize	Individuals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	0,000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Below the table, there is an 'Add Subtotals' checkbox and a row of buttons: 'Quick Add', 'Add Pivot', 'Remove All', 'Design Form', 'Continue to Summary', and 'Preview'.

9. Click the Preview button and note the results

This report is a summary of cases and individuals by nationality.

10. Return to the Filters Tab and add the new filter



11. Click the Preview button and note the results

12. Click Save As, give the report the name "Summary Report – [Last Name]"

Create a Pivot Table Report

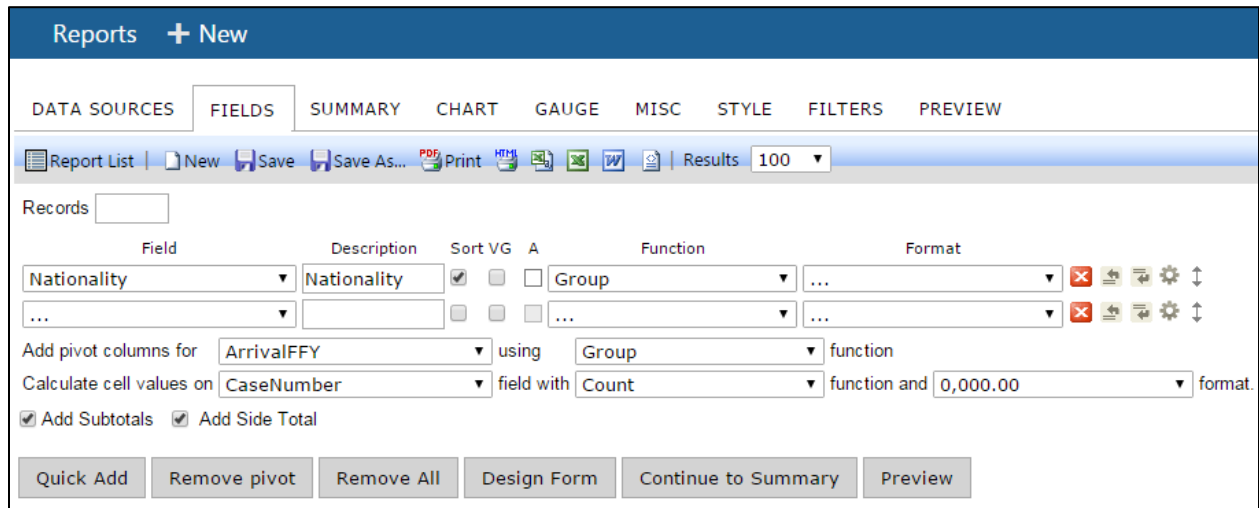
13. Return to the Fields tab

- Remove all fields except Nationality by clicking the red X for that field
- Check the Sort box next to Nationality to order the report by Nationality alphabetically

14. Click the Add pivot button and set the following settings

- Add pivot columns for “ArrivalFFY” using “Group” function
- Calculate cell values on “CaseNumber” field with “Count” function
- Check the boxes for Add Subtotals and Add Side Total

The Fields tab should look like this ...



15. Return to the Filters tab

- Change the filter for ArrivalDate to 10/1/2010 to Today's Date
- Click the check box next to Show Filters In Report Description

16. Click the Preview button and note the results

17. Save the report as “Pivot Report – [Last Name]”

Run the Reports

18. Leave Report Designer and go to the Report List and open your pivot report

19. Experiment with changing the filters and updating the report