IRIS Custom Report Step by Step Tutorial

Last Updated: 3/8/2018

Contents

Introduction

This tutorial is a guide for creating create a Detail Report, Summary Report and Pivot Report. Together, these report types provide a solid foundation for working with the IRIS Custom Reporting tool.

The Custom Report Data Dictionary describes all the data available for reporting and is a key resource when viewing or creating reports. The Data Dictionary, other reference material and self-guided training videos may be found at www.irisweb.org.
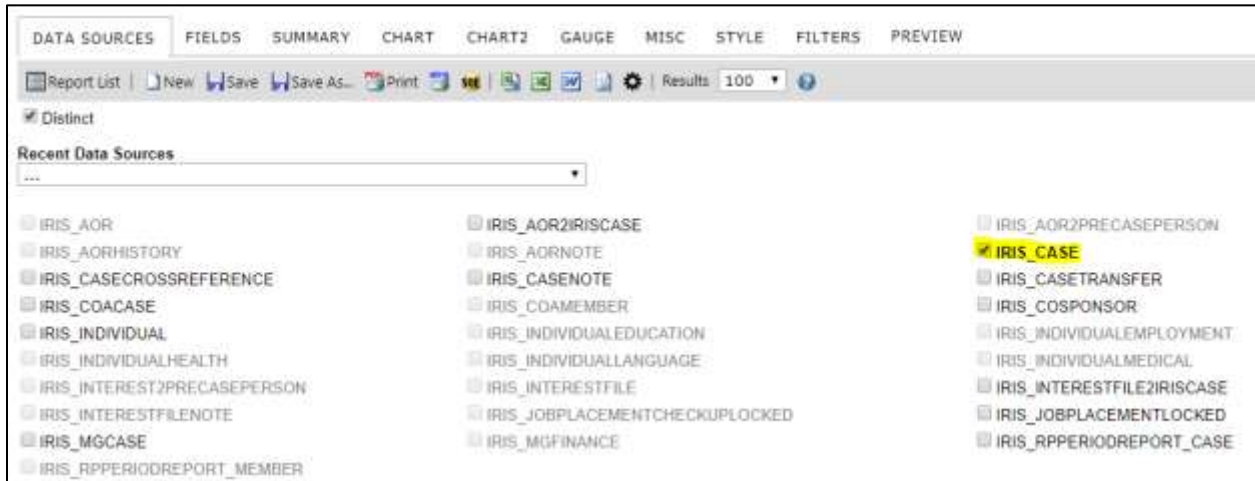
GETTING STARTED: Access IRIS Custom Reports from the IRIS Dashboard

Create a Detail Report

Goal: List the SIV cases that arrived in federal fiscal year 2017 including the number of adults and minors

1. Click the New button and select the data sources

2. Add fields

3. Add filters

Add the filters as shown below.

Be sure to choose the Filter Field, Operator and Value. Note the different type of "Operators".

Refer to IRIS Custom Report FAQ for more information about Operators.

	DATA SOURCES	FIELDS	SUMMARY	CHART	CHART2	GAUGE	MISC	STYLE	FILTERS	PREVIEW

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

	Filter Field	Operator	Value(s)		Format
1	Status ▼	Equals (Select) ▼	Active	▼ ...	▼
2	RP ▼	Equals (Select) ▼	Y	▼ ...	▼
3	ArrivalDate ▼	Between(Calendar) ▼	10/1/2016 9/30/2017	...	▼
4	SIV ▼	Equals (Select) ▼	Y	▼ ...	▼
5	... ▼	... ▼		...	▼

☑ Show Filters In Report Description

Note: Check the box for "Show Filters in Report Description". This will show the criteria (i.e. "filters") for the finished report making it easier to interpret later.

4. Click the Preview tab and note the results
5. Click the Save As button and name the report "Detail Report – [Last Name]". For example, "Basic Detail Report – Smith"

BONUS
Click the Summary tab and add a summary table that counts the total cases and total individuals

	DATA SOURCES	FIELDS	SUMMARY	CHART	CHART2	GAUGE	MISC	STYLE	FILTERS

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

Title [   ]   Records [   ]

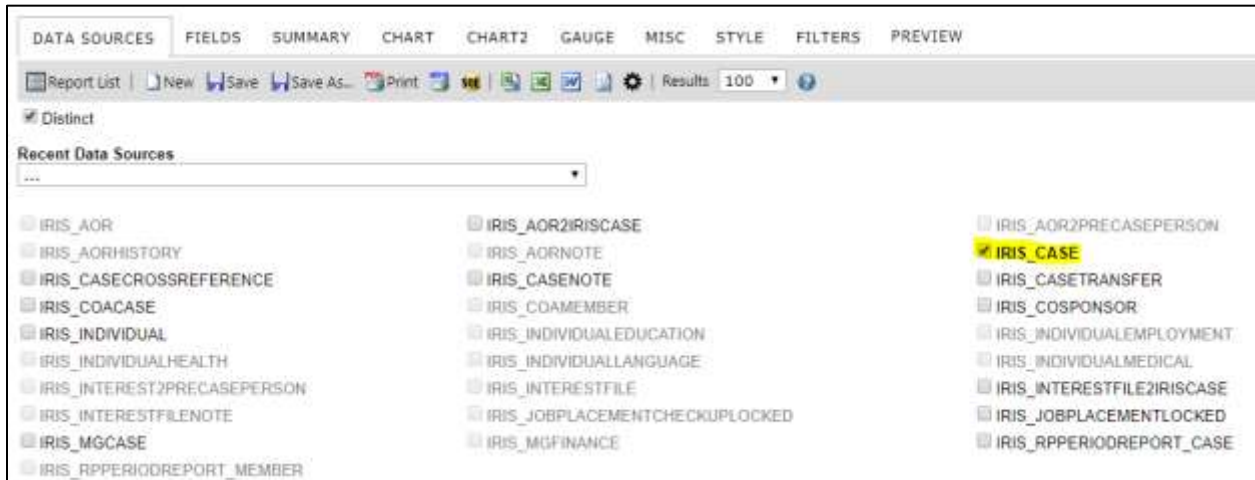| Field	Description	Sort	Function	Format	
CaseNumber ▼	Cases	☐	Count ▼	0,000 ▼	✖
CaseSize ▼	Individuals	☐	Sum ▼	0,000 ▼	✖
... ▼		☐	... ▼	... ▼	✖

Click Preview

6. Return to Report Catalog, Locate and View the Report

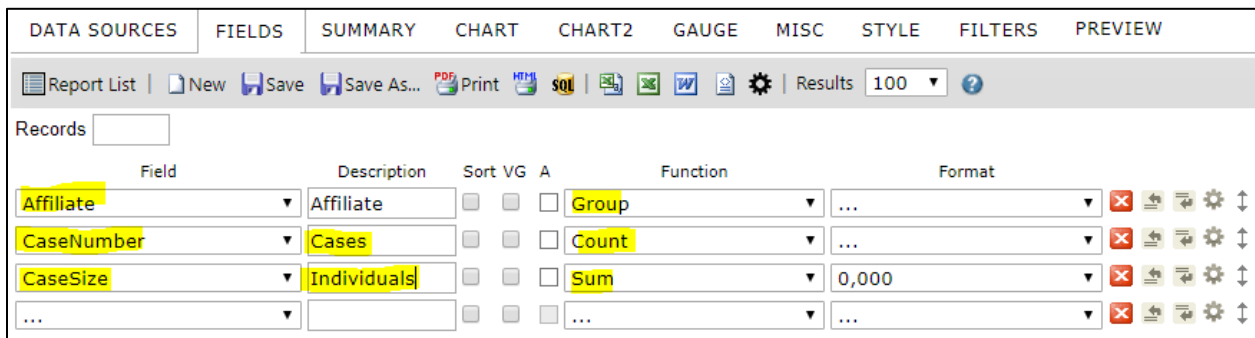## Create a Summary Report

<u>Goal</u>: Count the SIV cases and individuals by affiliate that arrived in federal fiscal year 2017

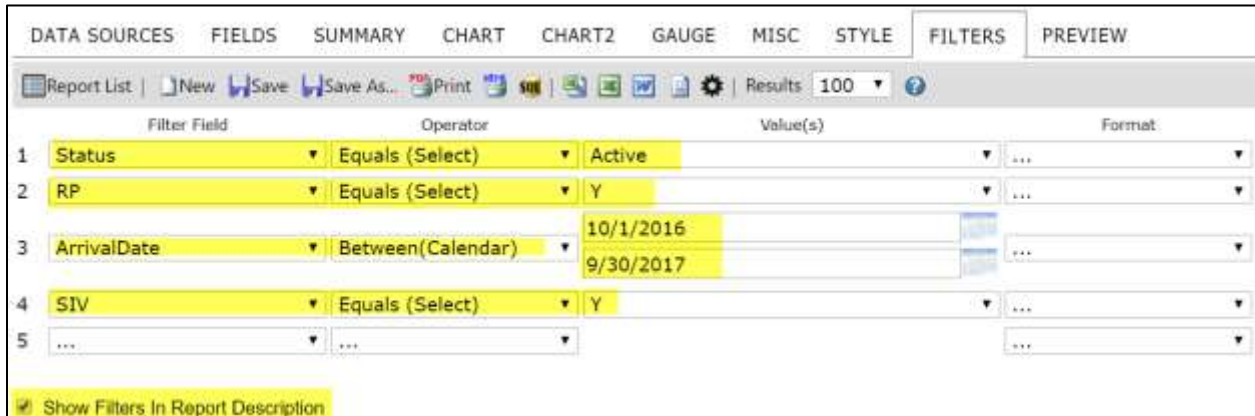   **1. Click the New button and select the data sources**

    2.   Add fields
   - a. Group by Affiliate
   - b. Count CaseNumber, change Description to "Cases"
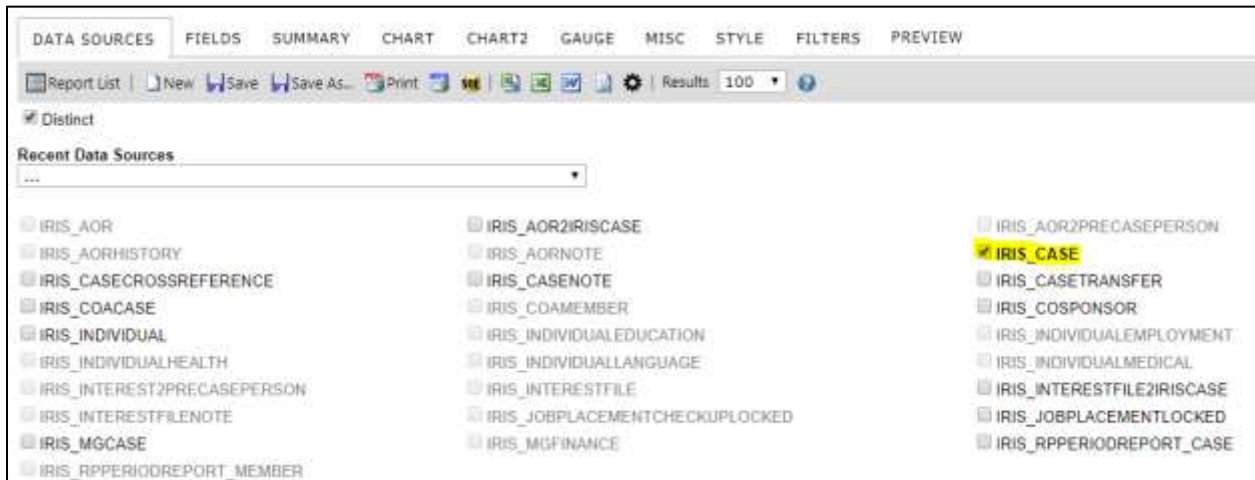   - c. Sum CaseSize, change Description to "Individuals"

3.   Add filters

4. **Click the Preview button** and note the results
5. **Click the Save As button** and name the report "Summary Report – [Last Name]"

Create a Pivot Table Report

Goal: Count the number of SIV Case Members by Affiliate and Nationality that arrived in fiscal year 2017

1. **Click New Report and select the data sources**

2. Add Fields and click the "Add Pivot" button
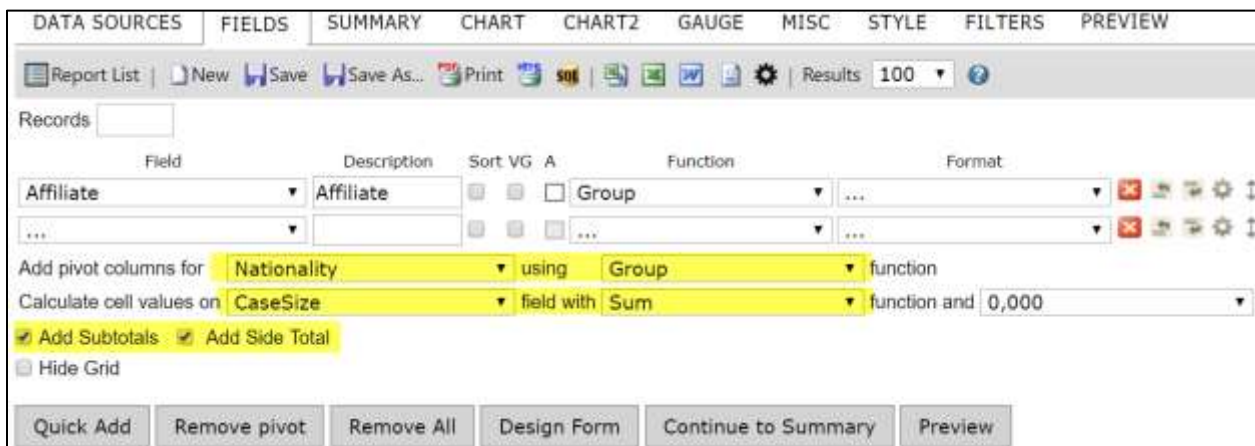
Choose the Affiliate Field and Function "Group"

Next, click the "Add Pivot" button.

Make the selections shown below

Click "Add Subtotals" and "Add Side Totals"

3. Add filters

4. **Click the Preview button** and note the results
5. **Click the Save As button** and name the report "Pivot Report – [Last Name]"