# IROC Reporting Module

The IROC Reporting Module allows users to access, modify, and distribute predefined and custom reports. This reference guide covers the use of predefined reports.

> **Tip:** If you do not have the view of reports shown in this document, click Switch to New UI at the top right of your page.

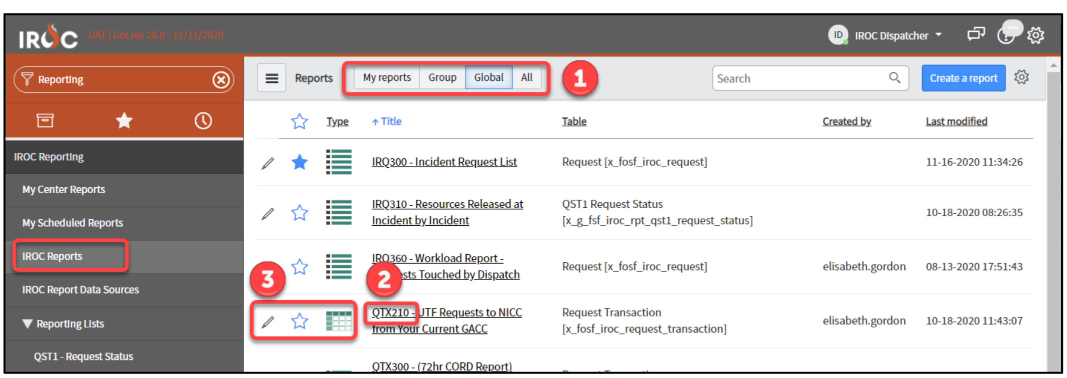
## Accessing Reports and Schedules

In the IROC Data Management Tool (DMT), navigate to **IROC Reporting** in the application menu and choose the appropriate module to view reports.

1. **My Center Reports** contains reports distributed to your dispatch center. A limited number of reporting users have the capability to distribute reports to different dispatch centers.
2. **My Scheduled Reports** displays your report distribution schedules. Click on a schedule to view and edit.
   a. From the Schedule screen, you can click **Execute Now** to distribute the report immediately.
   b. Click **Delete** to delete your scheduled report.
   Remember, you can uncheck the **Active** box to stop the schedule from running, instead of deleting the schedule.
3. **IROC Reports** contains all reports you have access to.
4. **IROC Report Data Sources** contains user-defined combinations of a data source and filters, used for reporting. This is an advanced feature.
5. **Reporting Lists** are administrator-defined list reports. These reports cannot be modified or scheduled.

## Viewing IROC Reports

From the IROC Reports module, you can view and modify predefined reports. To open this module, click on **IROC Reports** ion the application menu (found under the **IROC Reporting** application).




1. The Reports screen groups reports in four different pages.
   a. **My Reports** displays all reports you modify and save.
   b. **Group** displays reports shared by a group or user.
   c. **Global** displays reports shared to a global group.
   d. **All** displays all reports you have access to.

**2** Reports are categorized by an alphanumeric prefix.

- **a** The first letter indicates the record type. (I – Incident, Q – Request, R – Resource).
- **b** The next two letters indicate the action (RQ – Request, TX – Transaction, ST – Status).
- **c** The number indicates the dispatch focus (100 – National, 200 – GACC, 300 – Dispatch Center).

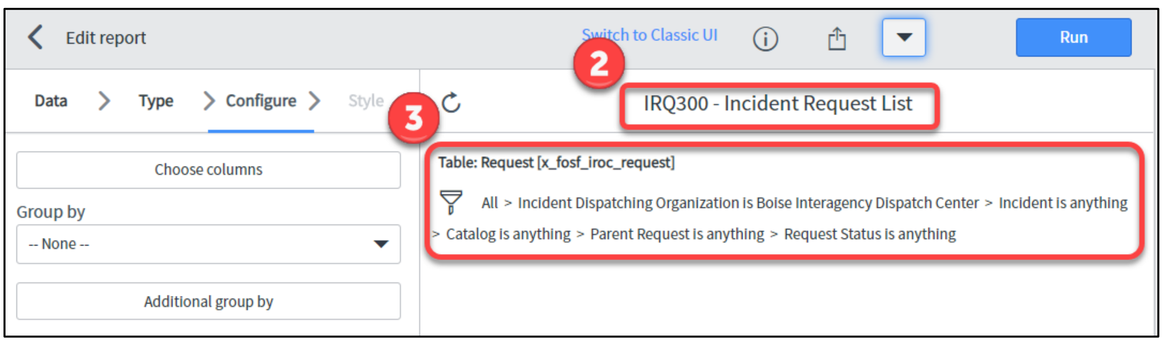
**3** Select a predefined report in the Reports list.

- **a** Click the **Edit** (🖉) icon to edit the report.
- **b** Click the **Favorite (☆)** icon to label the report as a favorite.
- **c** The **Type** column displays an icon indicating the type of report. Hover over the icon for a quick view of information about the report.
- **d** Click on the underlined **Title** of a report to open and run the report.

## Customizing a Report

Starting with a predefined report, you can customize parameters to create a report for your needs.

You can modify a report by clicking the **Edit** icon or the title of the report. Clicking the report title also runs the report and shows results.




**1** Edit a report by clicking the **Edit** (🖉) icon.

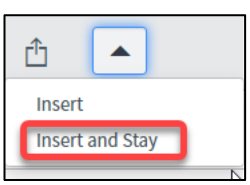
**2** Click inside the report title to change the title.
Changes will be made to your report only. The predefined report will not be modified.

**3** View and modify the report data filter on the right side of the screen, below the report title.
The filter breadcrumbs indicate the current filter conditions.

**4** Click on the **Filter** (⛉) icon to modify and create filter conditions.

**5** Save your report.

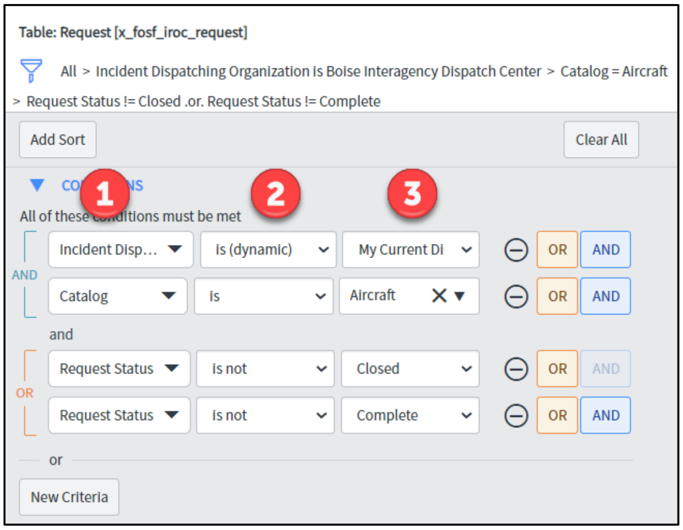
- **a** The first time you save, click on the arrow (⏷) icon and select **Insert and Stay**. This will save your record and remain on the page to continue editing.



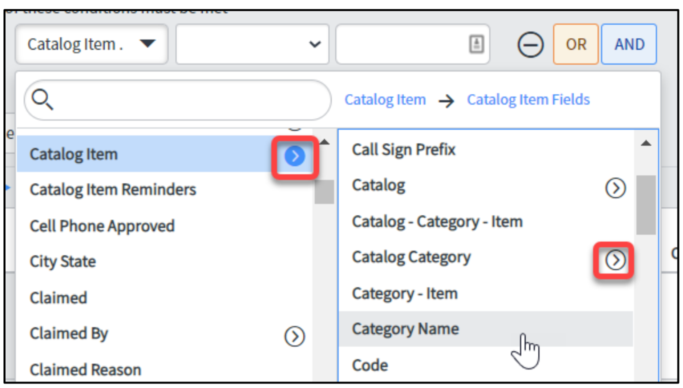

- **b** After the first time you save the record, a **Save** button will be displayed. Click **Save** to save your record. Be sure to save your work frequently.

## Using Advanced Filters

You can select a few simple conditions, or you can use complex combinations of conditions to filter your report results.




**1** Start building the filter by selecting a data field to test. Fields indicated with ** allow you to drill down to underlying record fields. Click on the arrow icon to view record fields related to the chosen field.




For example, if I want to check for a Catalog Category, you can drill down from **Catalog Item** to **Catalog Category** (or drill down further under the Catalog Category field).

**2** Select a condition to meet, such as "is" or "starts with".
**Tip:** Choose "**is (dynamic)**" for fields that may change, such as "My Current Dispatch."

**3** Enter a value to measure.

**4** Click the ⊖ icon to remove the condition line.

Use the **OR** and **AND** buttons to add more complex filters. The example above asks for all records in **my current dispatch** that are **aircraft** and are for open requests (those that are **not closed or not complete**).

**5** Click **OR** and **AND** buttons to add more complex filters.

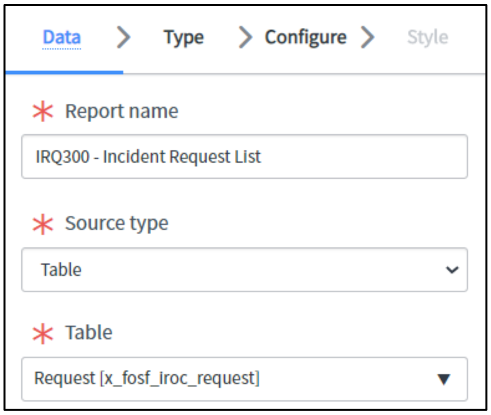
**6** Click **New Criteria** to add a new series of conditions, separate from the previous.

**7** Check your filters any time by clicking **Run** to execute the search and display resulting data.
Tip: Save your work frequently. If you inadvertently click on a link in your report results, you will leave the page and lose your work.

## Report Configuration

Additional report configurations appear in the left pane of the Edit Report screen.

1 The **Data** pane will be pre-populated, and most users will not have to change these fields.

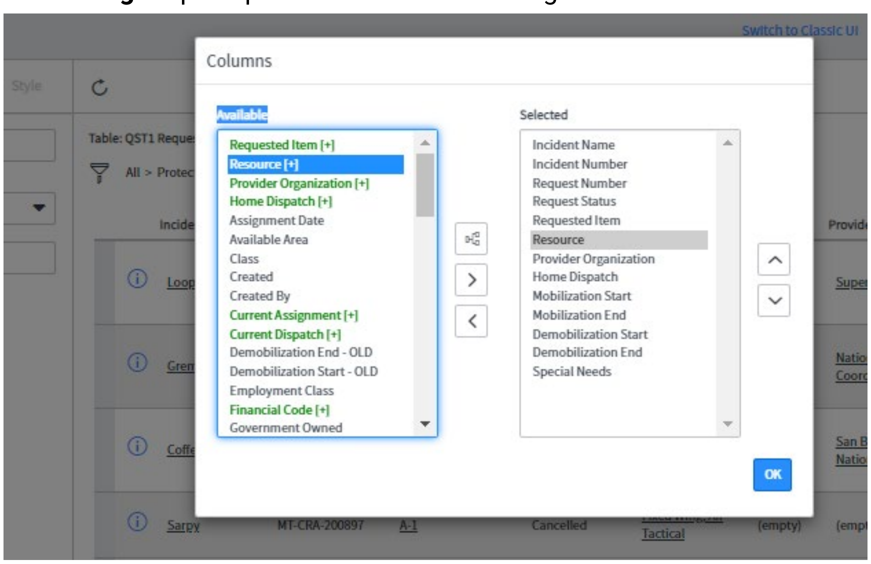



a The **Report Name** can be edited here and in the report screen header.

b Your data **Source Type** can be a database table or a predefined data source.
Data sources are reusable, predefined combinations of a database table and conditions. This is an advanced feature.

2 Reports can be created in a variety of **Types**. In most cases, your report will be a **List** report. You can use other report types to create graphs and dashboard elements.

3 The **Configure** pane provides two useful configurations.




a Click **Choose Columns** to add or remove columns to or from your report. This is especially useful if your report output has columns with no data displayed.

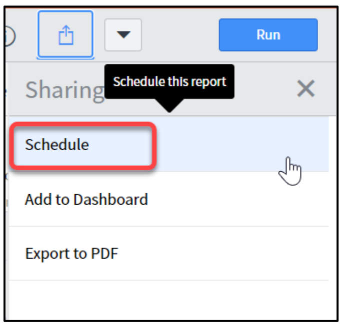
b Available fields in green with a **[+]** indicate fields that have drill-down capabilities in the report, linking you to related records. Click on a green item in the Available list and then click on the **Category** icon ( ) that appears to drill down deeper into that item.

c You can group data in the report by specific fields. Click the **Group By** drop-down list to group report data by the chosen field.

4 The **Style** options will be visible for some report types (graphs). If a **List** report is selected, this tab will be grayed out.
Tip: Save your work frequently. If you inadvertently click on a link in your report results, you will leave the page and lose your work.

## Sharing Reports

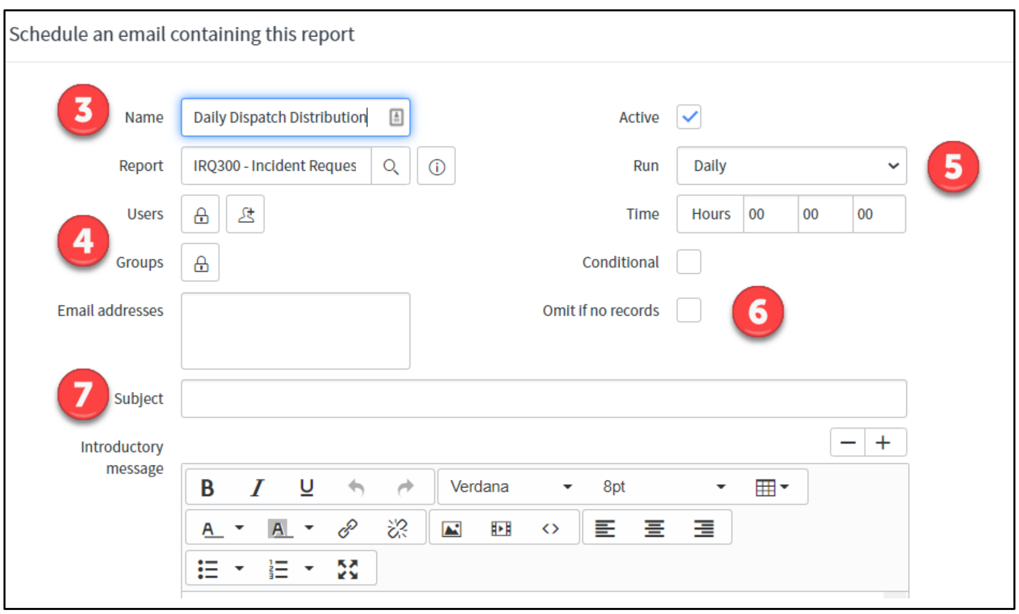
IROC can automatically distribute reports to groups and individuals on your behalf.




1 Click the **Sharing** ( ) icon to create report sharing options for the open report.

2 Click **Schedule** to schedule report distribution in the scheduling options pane.

3 Enter a descriptive **Name** for your report schedule.




4 Select **Users**, **Groups**, and/or **Email Addresses** to distribute your report to. Click the **Lock** icon to add entries, where displayed.
If a report is designated for a user account that is inactive or an email address associated with an inactive account, that user will not receive a report.

5 Select the report **Run** frequency (such as monthly).
Frequency-related fields appear depending on the selected **Run** value. Complete these fields to choose the desired day and time to generate the report.

6 Check **Omit If No Records** to suppress the scheduled report if it would result in a blank report (one in which no data is returned by the filtered query).

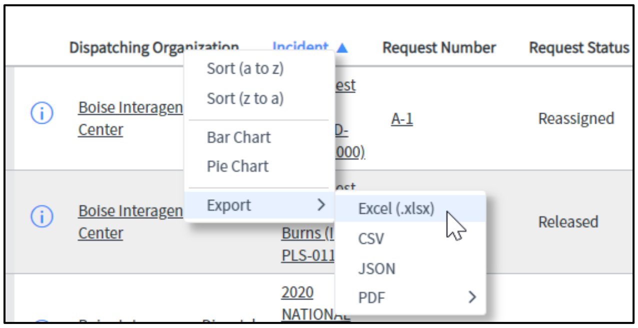
**7** Enter a **Subject** and **Introductory Message** for the email that will accompany the report.

**8** Choose a file format for the report.

**9** If the report will be very large, reduce the file size by checking **Zip Output** to deliver the report in a compressed zip file.

**10** Click **Submit** to save your report schedule, or click **Delete (X)** to close the window without saving.

**11** To distribute a report manually, click **Export to PDF** to download a PDF report.
Optionally, to download a report in a different format, right-click any column header within the report and select **Export** from the list.




**12** To manage existing scheduled reports, select the **My Scheduled Reports** module from the IROC Reporting application menu in the Application Navigator.
To temporarily stop distributing a scheduled report, uncheck the **Active** box. Check the box again to reactivate the schedule.