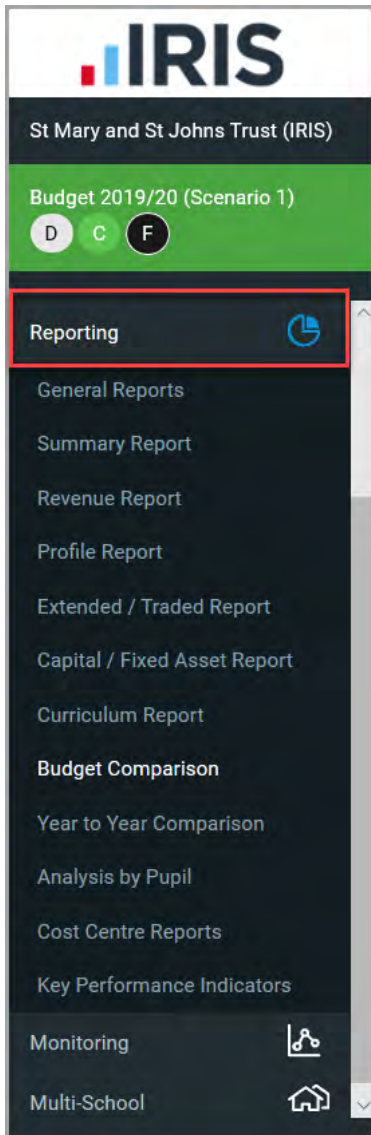## Generate Reports in IRIS Financial Planner

This guide provides information on how to generate reports, change the view and utilise the date. We have provided some examples of the most common reports in IRIS Financial Planner, although many other reports are available.

Generating Reports

.IRIS

St Mary and St Johns Trust (IRIS)

Budget 2019/20 (Scenario 1)
D C F

Reporting

General Reports

Summary Report

Revenue Report

Profile Report

Extended / Traded Report

Capital / Fixed Asset Report

Curriculum Report

Budget Comparison

Year to Year Comparison

Analysis by Pupil

Cost Centre Reports

Key Performance Indicators

Monitoring

Multi-School

Available reports are generated by selecting the required report from the **Reporting** menu.

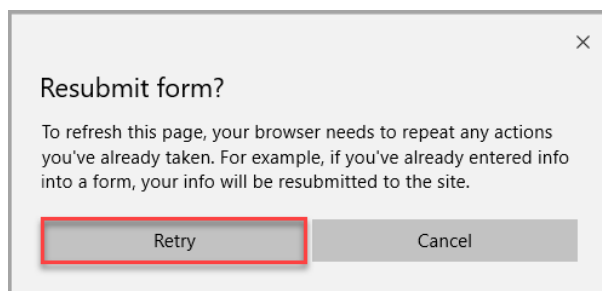Once selected, a message is displayed indicating that the report is being generated.

Report data is building... page will be updated automatically once finished. ✕
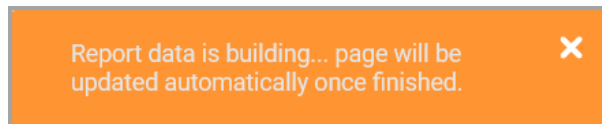
The page then refreshes, with a message displayed indicating that the report has been successfully loaded. The report is then displayed.

Report successfully loaded ✕

Various options are available to alter the display and view additional data. As changes are made, the report will rebuild and the orange message will re-appear.

Occasionally, you will be asked to **Resubmit form** to confirm that you want to refresh the existing data. Click the **Retry** button to proceed.

Resubmit form? ✕

To refresh this page, your browser needs to repeat any actions you've already taken. For example, if you've already entered info into a form, your info will be resubmitted to the site.

Retry   Cancel

Report Options

Changing the Duration of a Report

Some reports can be run from 1 to 5 years by selecting the required duration from the drop-down list at the top of the report.
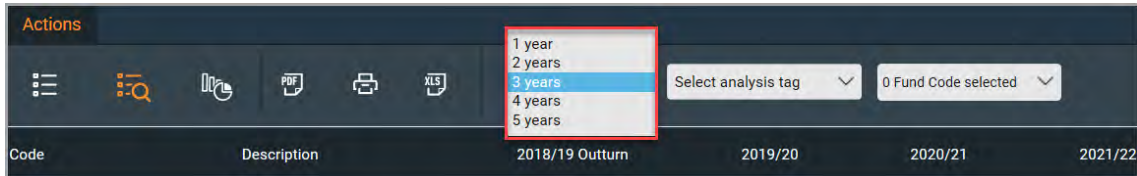
Reporting by Analysis Tags or Fund Codes

Some reports provide the opportunity to generate the report by specific analysis tags and/or fund codes. Simply select the required tags/fund codes from the drop-down lists.
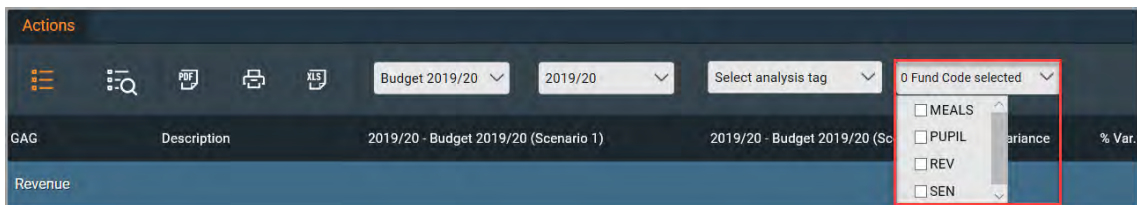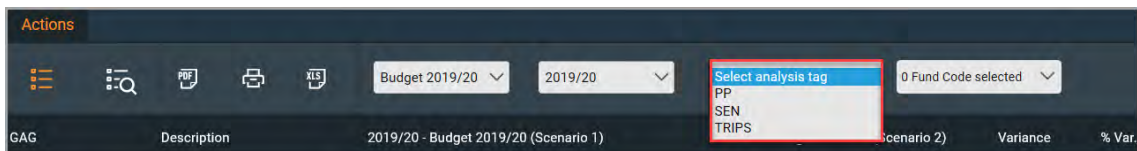
Printing, PDF Creation, or Exporting Reports

Three icons are displayed on the reporting toolbar enabling a report to be generated as a PDF for electronic distribution, printed, or exported as a Microsoft Excel spreadsheet for further manipulation.

Click the **PDF** icon to automatically generate a PDF file, or the **XLS** icon to automatically generate an XLS file which can then be opened or saved as required. The method of achieving this will vary slightly between internet browsers. The following graphic shows the options available from a Microsoft Edge browser.

To produce a printed copy, click the **Print** icon.

PS Financials By IRIS

HOW TO......

Switching between Summary and Detailed View

A majority of reports provide the facility to switch between a summary and detailed view. This can be particularly useful for reports containing a large amount of information.

 Note: The type of view selected will be retained even if another report is produced.

Two icons are available on the reporting toolbar – the left-hand icon produces a summary report and the right-hand icon (with the magnifying glass) produces a detailed report. The icon highlighted in orange indicates the view currently shown. The following graphic indicates the report is being displayed as a summary view. Simply click the alternate icon to change the view.
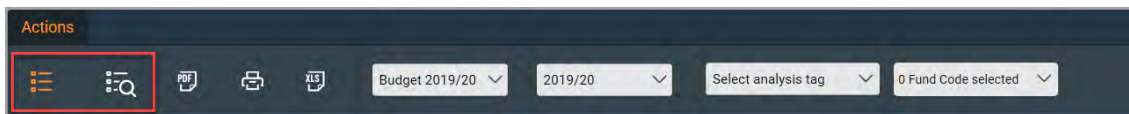
Switching to a Chart

Some reports have the option to present the results in chart format. This is achieved by clicking the chart icon.
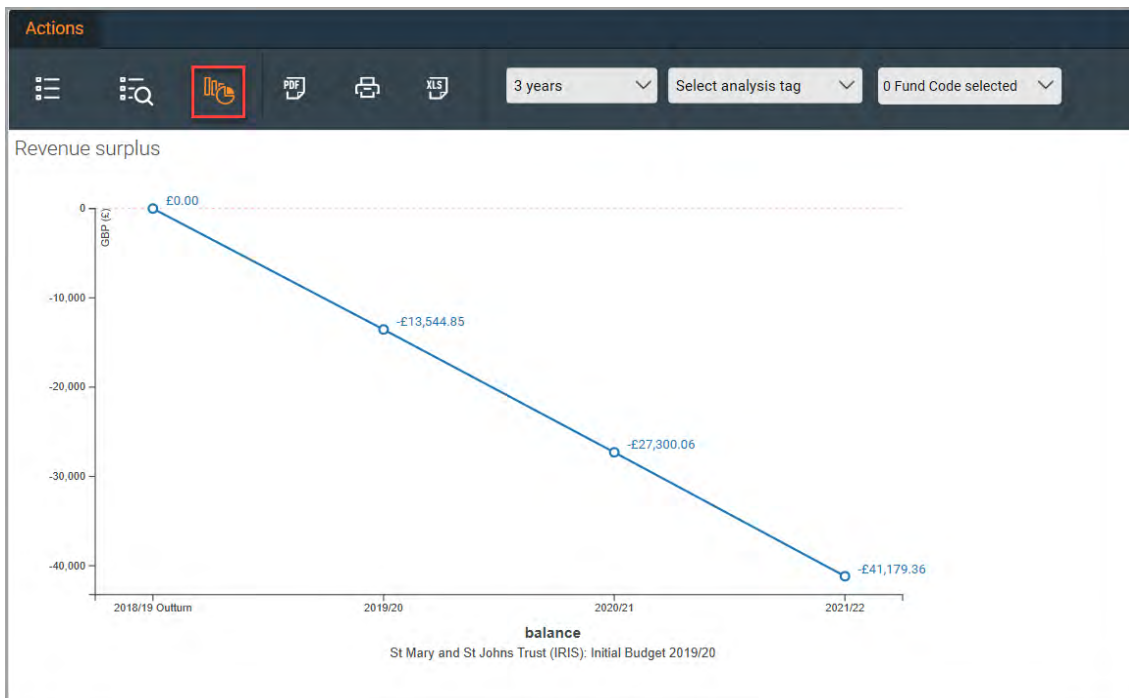
Accessing More Information

On some reports, any information displayed in blue indicates that more information is available. This information is only available when the report is displayed in *Detailed* rather than *Summary* view.

In the following example from a Revenue report, under the **Revenue Expenditure** heading, various salary forecasts can be accessed.

In this example, selecting a salary forecast generates and displays the Staff by Year report, filtered by staff type.

Common Reports

Summary Report

The Summary report provides an overview of the whole budget including brought forward, revenue, extended/traded and capital/fixed assets. The report enables you to view your budget as a whole, helping to identify which areas require further investigation.

Select **Reporting > Summary Report > GAG Summary Report** from the sidebar menu.

The summary report lists planned balances at a financial report code level.

Revenue Report

The Revenue Report provides a detailed, line by line, view of your revenue income and expenditure. The blue hyperlinks on the report enable you to drill down to the specific entry. The Extended/Traded and Capital/Fixed Asset reports work in the same way, but for their relevant budget categories.

Select **Reporting > Revenue Report > GAG Revenue Report** from the sidebar menu.

Profile Report

The Profile Report shows how your budget is profiled. It enables you to compare month to month, whether you have a balanced budget or if you are overspending one month and underspending another month.

Select **Report > Profile Report > GAG Profile Report** from the sidebar menu.

Budget Comparison

The Budget Comparison report enables you to quickly view the difference between two budgets.

Select **Report > Budget Comparison > GAG Budget Comparison** from the sidebar menu.

The differences between the budget will show as the cost, variance and variance percentage.

The report automatically compares the current budget to another budget. This can be changed by selecting a different budget from the drop-down list.

If required, you can also change the year being compared using the adjacent drop-down list.

Where to Get More Help and Information

Our currently available documentation can be found at the following address:
https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation

You can also utilise information on our Support Portal at the following address:
https://psfinancials.zendesk.com

Providing Feedback on our Documentation

If you have any feedback, comments or suggestions regarding our documentation, please email:

documentation@psfinancials.com

DOCUMENT REFERENCE	DESCRIPTION
TM-171219-GRE-IFP-1.0	Initial release