



Children's Registry and Information System  
**Advanced Reports Manual**

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# About This Manual

This manual was created to guide the development, design and modification of reports in the Children’s Registry and Information System (CHRIS) program. It includes instructions and step-by-step examples for creating custom reports.

For additional information on the CHRIS Project, refer to the *User Manual*, *Data Facilitator Manual*, *Reports Manual*, and *Field Reference Guide*. All support documentation can be retrieved from the CHRIS website at [www.chris.miami.edu](http://www.chris.miami.edu).

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# Legend

The following is a list of conventions used throughout this manual:

**Bold** The titles of CHRIS Gold screens and screen sections are presented in **bold-faced type**.

*Italics* Field names, as well as references to tables, figures, and hands-on exercises, are presented in *italics*.

UPPERCASE CHRIS buttons and main menu options are presented in UPPERCASE letters.

Title Case CHRIS-related reports, event names, functions, and lists (e.g., Duplicate Child Report, Service Coordination, Child Record Locator, Code List) are presented in Title Case.



***The IMPORTANT icon is used in the left margin to highlight information essential to the integrity and/or performance of CHRIS Gold.***



***The NOTE icon is used in the left margin to highlight information that deserves special attention.***



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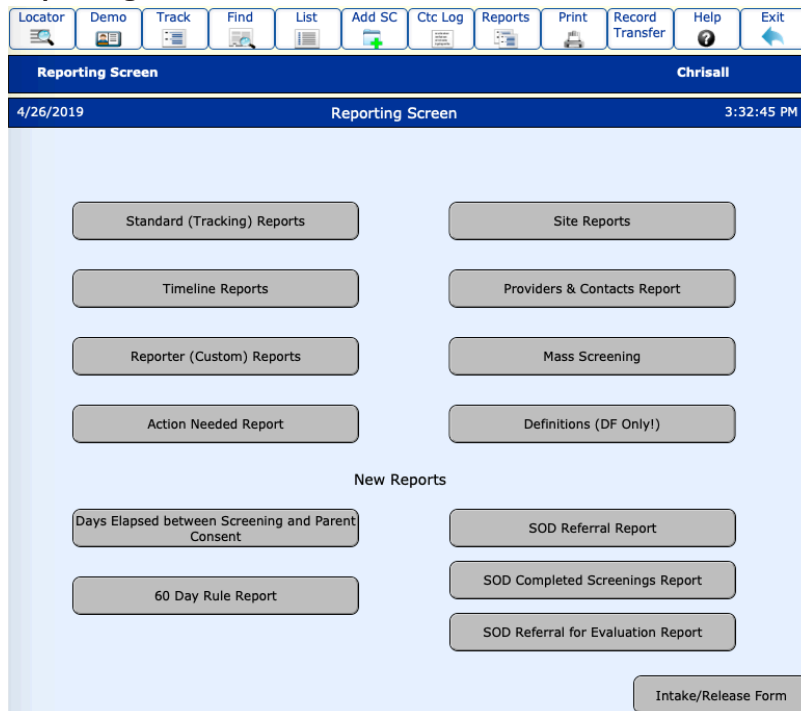




Clicking the REPORTS button on the main menu will display the **Reporting** screen (see Figure 2). The **Reporting** screen displays all of the report options for the CHRIS program.

**FIGURE 2**

### Reporting Screen



### Options

Reporting options are described as follows:

- STANDARD (TRACKING) REPORTS – Contains standard reports
- TIMELINE REPORTS – Contains Timeline-specific reports
- REPORTER (CUSTOM) REPORTS – Allows for the creation of custom reports
- ACTION NEEDED REPORT – Contains Action Needed Reports for case management
- SITE REPORT – Contains Site Reports that can be run by Center, Site, or County (These reports can only be run by the Help Desk.)
- PROVIDERS & CONTACTS REPORT – Contains data entry and directory reports for Providers & Contacts



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## New Reports

- DAYS ELAPSED BETWEEN SCREENING AND PARENT CONSENT – Contains a report of days elapsed from Screening to Parent Consent for Evaluation. Includes average number of days and can be displayed graphically and/or in a list.
- 60-DAY RULE REPORT – Contains a report of days elapsed from Parent Consent for Evaluation to Evaluation Completion Date. Includes average number of days and can be displayed graphically and/or in a list.
- SOD REFERRAL REPORT– (Schedule of Deliverables Referral Report) Displays the number of Referral First Contacts or Referral Ins within a chosen date range. This report breaks down the results by individual county (if applicable).
- SOD COMPLETED SCREENINGS REPORT – Displays the number of completed screenings within a chosen date range. This report breaks down the results by individual county (if applicable).
- SOD REFERRAL FOR EVALUATION REPORT – Displays the number of evaluation referrals within a chosen date range. This report breaks down the results by individual county (if applicable).

Information on Mass Screening can be found in the *User Manual*. Information on managing Definitions can be found in the *Data Facilitator Manual*.

# Reports Find Screen

Clicking either the STANDARD (TRACKING) REPORTS button or the REPORTER (CUSTOM) REPORTS button on the **Reporting** screen (see Figure 2) will display the **Reports Find** screen (see Figure 3). The **Reports Find** screen is used to select the data needed to create standard and custom reports for the CHRIS database.

**FIGURE 3** Reports Find Screen

The screenshot displays the 'Reports Find Screen' interface. At the top, there is a header bar with the date '4/17/2014' on the left, the title 'Reports Find Screen' in the center, and the time '3:28:45 PM' on the right. Below the header, there are two buttons: 'Cancel Find' and 'Perform Find'. The main area is divided into four columns: 'Table', 'Event', 'Field', and 'Value'. Each row in the table has a dropdown menu under the 'Table' column containing radio buttons for 'Demo', 'Timeline', 'ServiceCoordination', 'ActionNeeded', and 'Addresses'. The 'Event', 'Field', and 'Value' columns are empty text input fields. To the right of each row, there are radio buttons for 'Or' and 'Omit'. The interface is designed for selecting specific data fields and values for reporting purposes.



**Each section of the Reports Find screen allows users to enter search criteria that will be used to find data related to the desired report (see Figure 4).**

**FIGURE 4**

**Reports Find Screen Section**

3/25/2010		Reports Find Screen		9:34:16 AM
<u>Table</u>	<u>Event</u>	<u>Field</u>	<u>Value</u>	
<input type="radio"/> Demo <input type="radio"/> Timeline <input type="radio"/> ServiceCoordination <input type="radio"/> ActionNeeded <input type="radio"/> Addresses				

The *Table* field allows users to select the source of data needed. Select the table by clicking the circle to the left of the table name (see Figure 5).

**FIGURE 5**

**Reports Find Screen Table Field**

Table

- Demo
- Timeline
- ServiceCoordination
- ActionNeeded
- Addresses



**If demographic information is part of the find, Demo should be selected as the Table in the first section of the Reports Find screen.**

If either Timeline or Service Coordination is selected as the table, the *Event* field will automatically display a list of the events pertaining to the table chosen (see Figure 6). The appropriate event should be selected from the drop-down list. If Demo, Action Needed, or Addresses is selected as the table, the *Event* field is bypassed.

**FIGURE 6**

**Reports Find Screen Event Field**

<u>Table</u>	<u>Event</u>
<input type="radio"/> Demo <input checked="" type="radio"/> Timeline <input type="radio"/> ServiceCoordination <input type="radio"/> ActionNeeded <input type="radio"/> Addresses	<input type="text"/> EndTimeline ESEEligibility IEPIFSP ReferralForEvalua... ReferralForScreen... Transition

Once a table and an event (if necessary) are chosen, a list of fields unique to the selected table and event selected will automatically be displayed (see Figure 7). The appropriate field should be selected from the drop-down list.

**FIGURE 7** Reports Find Screen Field Field

Table	Event	Field
<input type="radio"/> Demo <input checked="" type="radio"/> Timeline <input type="radio"/> ServiceCoordination <input type="radio"/> ActionNeeded <input type="radio"/> Addresses	EndTimeline	<input type="text"/> EndAgeAtEvent EndDate EndNotes EndReason TotalDays

The find criteria are entered into the *Value* field (see Figure 8). For example, a date range would be entered as 01/01/2018...03/31/2018.

**FIGURE 8** Reports Find Screen Value Field

Table	Event	Field	Value
<input type="radio"/> Demo <input type="radio"/> Timeline <input checked="" type="radio"/> ServiceCoordination <input type="radio"/> ActionNeeded <input type="radio"/> Addresses	ConLog	ConLogDateOfContact	1/1/2018...3/31/2018

To execute the find, click the PERFORM FIND button (see Figure 3). The CANCEL FIND button cancels the find and returns the user to the **Reporting** screen (see Figure 2).

**FIGURE 9** Reports Find Options

Or  
 Omit

The **Reports Find** screen (see Figure 3) contains the following options for performing complex finds (see Figure 9):

- OR – Includes records that meet the criteria from that section, regardless of the criteria specified in other sections.
- OMIT – Omits a set of records from the find results. The OMIT button should be used in the last section of the **Reports Find** screen.

When find criteria are entered in more than one section, the find functions as an “And” find (results will contain only those records that meet all the criteria specified in all the sections) unless the OR or OMIT option is selected.

After clicking the PERFORM FIND button on the **Reports Find** screen, the **Sorting** screen is displayed (see Figure 10). This screen provides options for sorting the data in the report. Click the button associated with the desired sort option.

**FIGURE 10**

### Sorting Screen

6/10/2020 Report Sorting 13:19:06

Sort By Name

Sort by COR & Date of Birth & Name

Sort by Date of Birth & Name

Sort by COR & Screening Final Result

Sort by COR & Age & Timeline Status

Sort by COR & Age & Service Coordination Status

Sort by Date and Time For Appointments

Sort by DBNUM

Sort by County of Residence

Create your own sort order

Go to Reports

Total Number Found: 482



***On the Sorting screen, COR refers to County of Residence.***



***The GO TO REPORTS button leaves the records unsorted and takes the user to the Standard Reports screen (see Figure 11).***

Once the sort option is selected, the **Standard Reports** screen will be displayed (see Figure 11). This screen lists the standard report options available. Click the button to select the desired report.

### Standard Reports Screen

**FIGURE 11**

The screenshot shows the 'Standard Reports' screen with a blue header bar containing the date '9/22/2011', the title 'Standard Reports', and the time '9:19:22 AM'. Below the header is a grid of 24 buttons arranged in two columns. The buttons are: Referral Report (First Contact & In), Tracking Status of Referral for Screening, Event Count By Age Range (Year), Event Count By Age Range (Year/Month), Appointment Schedule, Screening Appointment Report, Screening Schedule Report, Screening Results Report, Timeline Status Summary Data (Detailed), Timeline Status Summary Data (Brief)(Yr&Mnth), Timeline Status Summary Data (Brief)(Year), EIP Referral Follow-up Report, Master Timeline Reason/Close/Total Report, 5 Y/O Active Report, ESE Staffing Report, IEP/IFSP Report, End Timeline/Inactive Reason Report, Screening Labels, Address Labels, Action Needed Report, Presenting Problem Report, Inactive Report, Speech/Language Evaluation Report, Timelines Report, Children's List, Code Summary, % Increase of Transitions( Indicator 12), and Verification Activity for Indicator 12. At the bottom left, it says 'Total Children Found: 11'. At the bottom right, there is an 'Exit Reports' button.



***The EXIT REPORTS button returns the user to the Reporting screen (see Figure 2).***

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## Performing Accurate Finds

Performing an accurate find is very important because the find provides the information on which reports will be based. Incorrect finds will produce inaccurate results. The following tips will assist users in performing accurate finds:

1. Know what specific data are required to create the desired report.
2. Be specific when performing finds. Given the number of records in the statewide database, it helps to be specific when performing finds. Enter date ranges, ID numbers, database numbers, or special terms to narrow the find criteria and return the data desired.
3. Limit the use of excessive search criteria. The **Reports Find** screen allows users to enter search criteria in up to six separate find sections. However, using numerous search criteria in a single report can cause inaccurate results. If you need to perform complicated finds to develop your report, contact the Help Desk for assistance.

## Find Operators

Use the find operators below to improve the search criteria for records (see Table 1).

**Find Operators Table**

**TABLE 1**

To find values that:	Use this operator:	Example:
Are less than the value of the item	<	<40 or <09/09/1998
Are less than or equal to the value of the item	<=	<=50
Are greater than the value of the item	>	>10/10/1998
Are greater than or equal to the value of the item	>=	>=10
Have some or all of a field's contents	=	=Ann (finds Ann or Ann Marie but not Annie)
Are an exact match of the field's contents	==	==Anne (finds Anne but not Ann Marie or Annie)
Are within the range specified	...	12:30...17:30
Are duplicated values	!	!Ann (finds Ann or Annie or Annette)
Include today's date	//	//
Have invalid dates or times	?	?
Have any one character	@	@
Have any one digit	#	#
Have zero or more unknown or variable text characters	*	*Anne* (finds Anne or Annette or Brianne)
Escape next character	\	\e
Include literal text (including spaces and punctuation) in a field (text exactly as it appears, but regardless of uppercase or lowercase)	""	"Jean-Louis"
Match phrase from anywhere (not only word start)	*""	"Louis"
Have empty fields	=	=



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# Custom Reports

Custom reports can be created in CHRIS using the Reporter program.

## Reporter

The Reporter program was developed to give users the flexibility to create custom report layouts and to modify existing report layouts. Reporter can be used to produce letters, forms, lists, tables, and other types of summarized data as well as to provide data to site managers and administrators. Reporter has no permission restrictions and is available to all CHRIS users. Users can duplicate, rename, change, or add on to layouts to produce more advanced reports. The Reporter program also allows the creation of FileMaker scripts, which can be customized in any report to facilitate performing finds, sorting, and printing. As such, a basic understanding of the CHRIS program and the FileMaker Pro application is required to design custom reports.

## Accessing Reporter

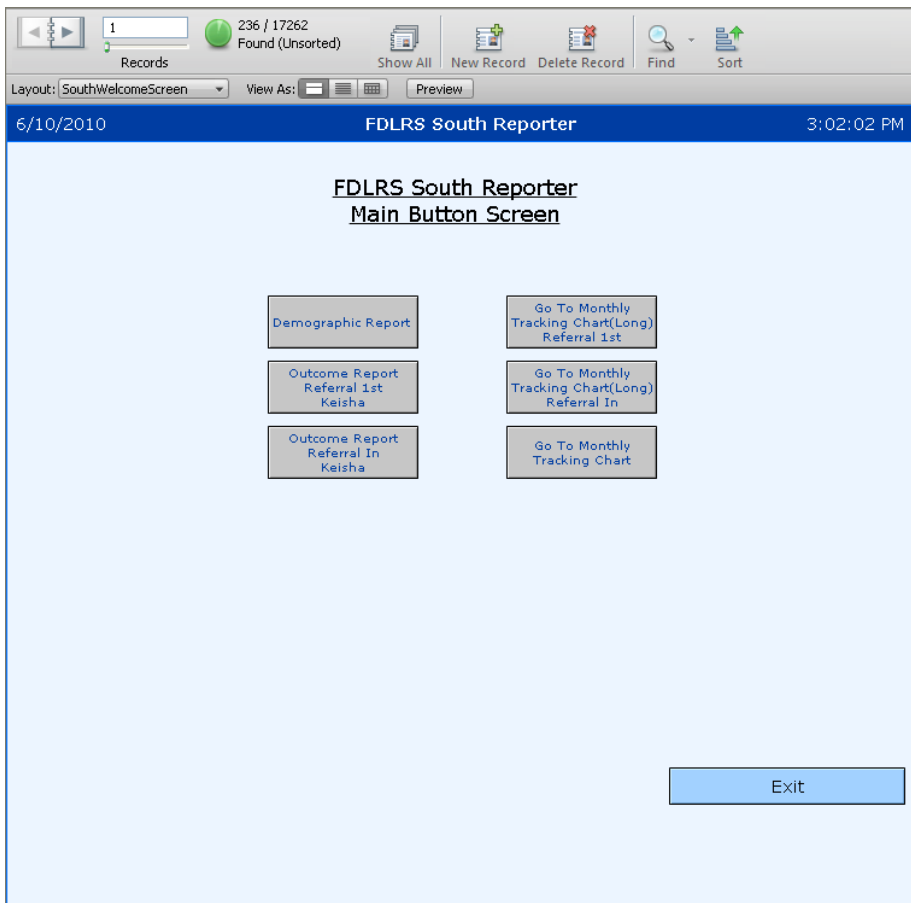
The first step to accessing the Reporter program is to select the REPORTS option from the CHRIS main menu. Then click the REPORTER (CUSTOM) REPORTS button on the CHRIS **Reporting** screen (see Figure 2). After clicking the REPORTER (CUSTOM) REPORTS button, the user will be provided with the same **Reports Find** screen used in the **Standard Reports** section of this manual (see Figure 3).

## Custom Reporter Menus

After performing the initial find on the **Reports Find** screen, the **Reporter** screen is displayed (see Figure 12). Each site has a unique **Reporter Welcome** screen. Sites are allowed to modify the attributes of this screen (e.g., buttons, colors, text) to suit their needs. Sites that use custom reports should develop a custom **Reporter Welcome** screen to allow users to locate site layouts.

### Florida Diagnostic and Learning Resource System (FDLRS) South Reporter Welcome Screen

FIGURE 12



## Reporter Exit Button

There is an EXIT button located on the **Reporter Welcome** screen (see Figure 12). This button allows users to exit Reporter and return to the main **Reporting** screen. Users can also create and use EXIT buttons on any custom reports to exit Reporter.



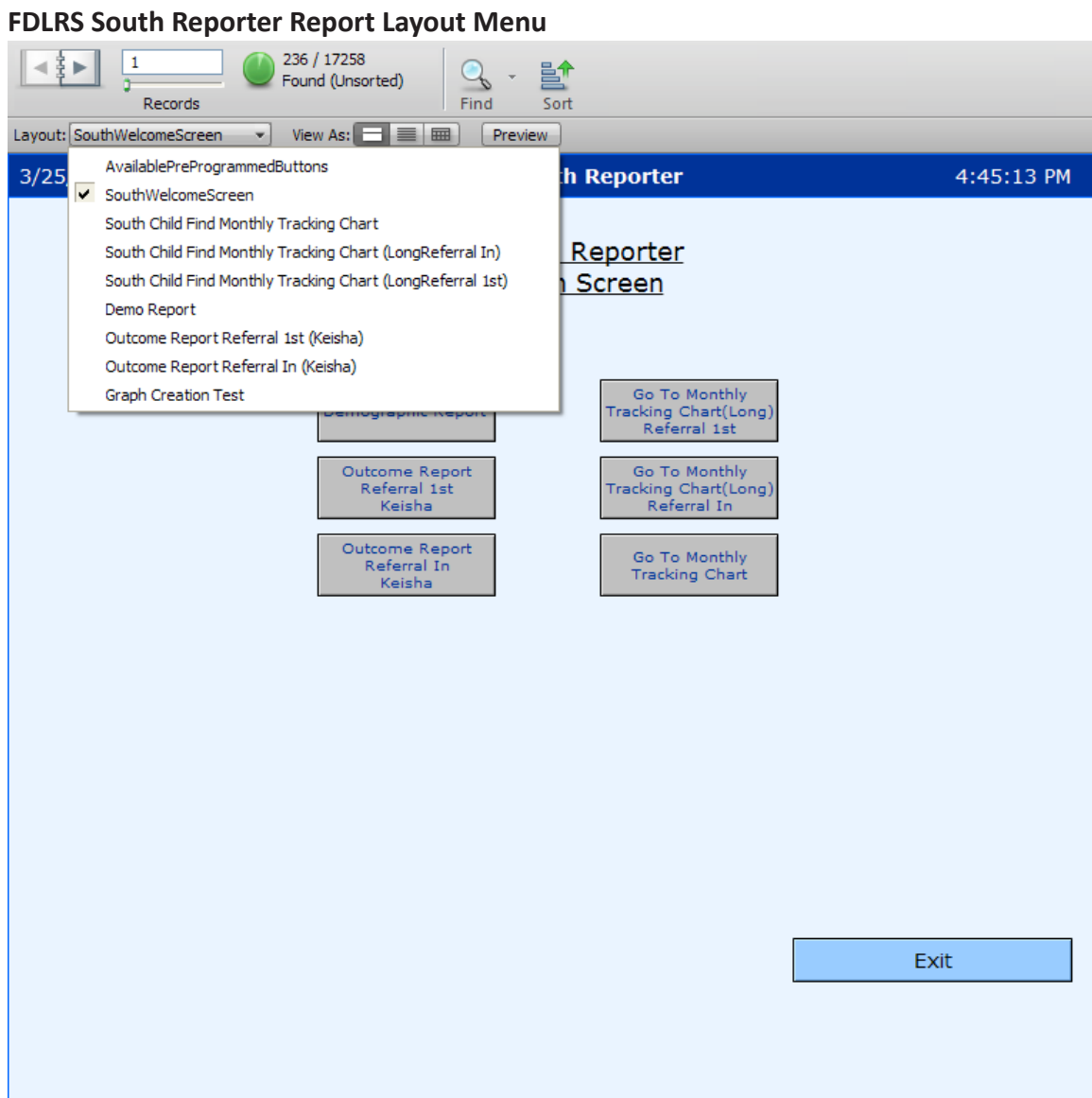
**While working in Layout mode (in the Reporter file), the EXIT button on the main menu will not be available.**

## Reporter Layout Menu

The Reporter layouts can be accessed using the Reporter Layout menu in Browse or Layout mode (see Figure 13). This drop-down menu displays a list of previously created report layouts and preprogrammed buttons. This menu can be used to move from one report layout to another or to edit report layouts.

In Browse or Layout mode, users can click on the name of a layout, which will take the user to the corresponding screen. In Layout mode, users can also enter the number of the report layout and press the Enter key to go to that screen.

FIGURE 13



## Reporter Relationship Help Sheet

The CHRIS *Reporter Relationship Help Sheet* (see Table 2) is a table that should be used for reference when adding fields to a new layout. The help sheet lists the relationship name that must be used to display the data for the fields selected.

**Reporter Relationship Help Sheet**

**TABLE 2**

Relationship Name	Definition
ActionNeeded	Used for adding Action Needed information, regardless of the event. The information in this file includes Action Needed Dates, Event Name, Event Date, <i>Action Needed Completed Date</i> , and <i>Action Needed</i> .
Addresses	Provides all fields pertaining to the parent or significant adult, including names, phone numbers, and addresses.
DemoEntry	Provides all demographic information for the child. This is also where fields such as <i>Current Exceptionality Status</i> , <i>Current Timeline Status</i> , and <i>Current Service Coordination Status</i> are located.
History	Provides all historical information regarding services that were provided prior to Part B services.
SiteList	Provides all site information, such as <i>Site Name</i> , <i>Address</i> , and <i>Phone Number</i> .
MostRecentTimeline	Provides all the most recent information on Timeline events. This is where fields such as <i>ESE Eligibility Date</i> and <i>Referral for Screening Date</i> , as well as information on Screenings and Evaluations conducted, are located.
MostRecent "Service Coordination Event Name"	Provides all the most recent information on Service Coordination events. For instance, to access fields from the Referral In event, use the MostRecentReferralIn relationship; for the Periodic Follow-Up event, use MostRecentPeriodicFollowUp, etc. For all Service Coordination events, always select the relationship name beginning with MostRecent.
FoundSetTimeline	Provides all the information on Timeline events for the current found set of records.
FoundSet "Service Coordination Event Name"	Provides all the information on Service Coordination events for the current found set of records.

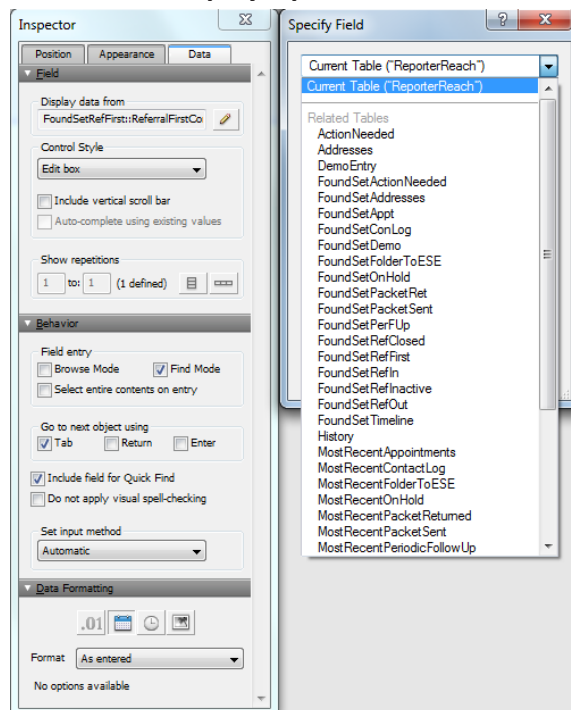
## Accessing Data Outside the Performed Find

The find performed on the **Reports Find** screen results in the current found set. These data are stored in the *Found Set Relationships* and can be displayed in the report. If a find is performed on demographic information only, reports based on the *Found Set Relationships* will only display demographic information. For example, the Referral Inactive Report would only display the demographic information because Referral Inactive information was not included in the original find. To access data outside the performed find, the table from which data for the report are obtained must be changed.

To modify a report to incorporate data from another table (i.e., data that are not in the found set), access the Data tab from the FileMaker Inspector, which is described in detail in the FileMaker Tools section of this document. Select a related table from the *Display data from* drop-down list (see Figure 14). Table names starting with “MostRecent” contain data from the most recent event of that type, not all events. For example, if a child has three Appointment events, selecting the related table *MostRecentAppointments* will make data from the most recent of these Appointment events available for use in the report. Data from the previous two appointments will not be available.

### CHRIS Data Display Options Window

FIGURE 14



***Incorporating data from a related table is one way to access data that were not included in the performed find. Another way to do this would be to exit Reporter and perform a new find that contains all the necessary data prior to re-entering Reporter.***

# Reporter Tools

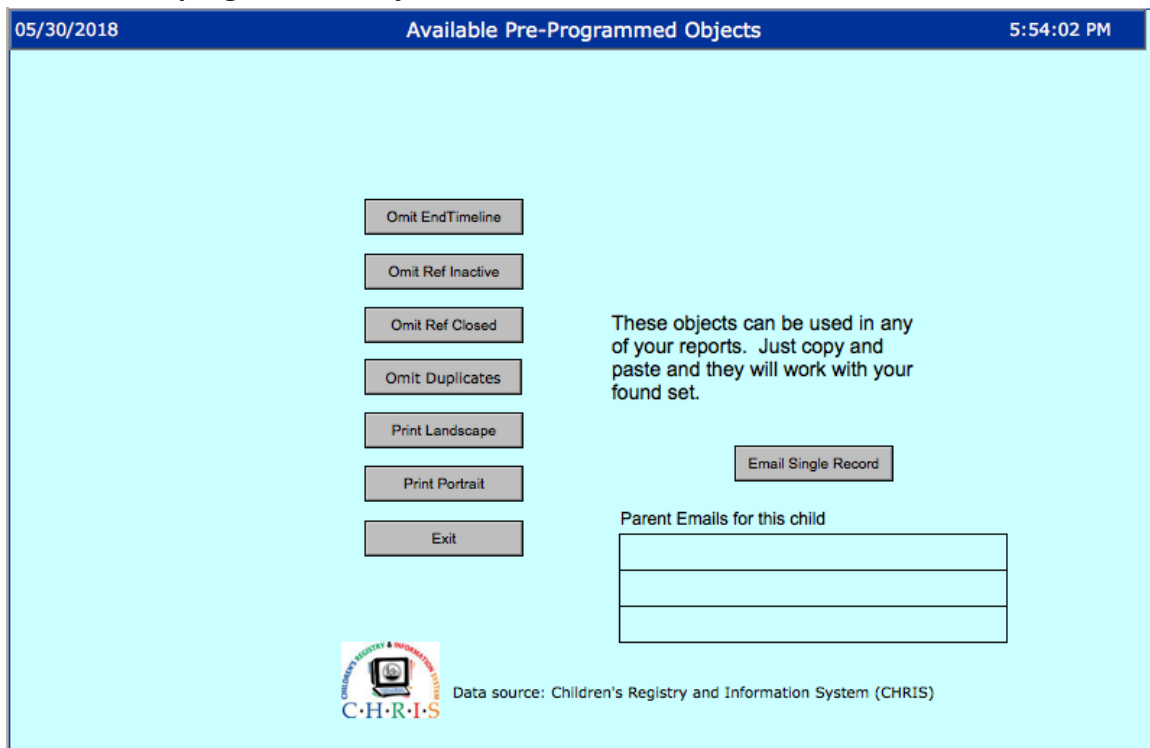
A variety of Reporter tools are available to facilitate the creation of custom reports in the CHRIS Reporter section.

## Objects

Pre-programmed objects allow users to include programmed scripts in their Reports (see Figure 15). These objects can be copied and pasted into any report layout for immediate use with the current found set of records. Users can modify these objects as needed.

### Available Preprogrammed Objects Screen

FIGURE 15



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## Options

- OMIT ENDTIMELINE – Removes any records from the report that currently have an ET (End Timeline) *Timeline Status* on the **Tracking Summary** screen
- OMIT REF INACTIVE – Removes any records from the report that currently have an RIN (Referral Inactive) *Service Coordination Status* in the **Tracking Summary** screen
- OMIT REF CLOSED – Removes any records from the report that currently have an RC (Referral Closed) *Service Coordination Status* in the **Tracking Summary** screen
- OMIT DUPLICATES – Removes any records from the report that have the same *DBNUM*
- PRINT LANDSCAPE – Prints the current report layout in landscape mode
- PRINT PORTRAIT – Prints the current report layout in portrait mode
- EXIT – Exits the current report layout and returns to the **Reporting** screen
- EMAIL SINGLE RECORD -- Send form or letter to first Significant Adult email address associated with the selected record
- PARENT EMAILS FOR THIS CHILD -- When placed in a layout, displays all Significant Adult email addresses for the selected record
- CHRIS LOGO -- Allows for pasting of CHRIS logo on any layout
- DATA SOURCE TEXT -- Allows for pasting of data source information on any layout

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## Add Pre-programmed Objects

To add a pre-programmed object to a layout, complete the following steps:


- Step 1. In Reporter, click on the drop-down menu list and choose the Available Preprogrammed Objects layout.
- Step 2. Switch to Layout mode.
- Step 3. Click to select the desired object.
- Step 4. Copy the object. Either right click with the mouse and select copy or press CTRL + C on the keyboard.
- Step 5. Go to the report layout where the object will be placed.
- Step 6. Paste the object. Either right click with the mouse and choose paste or press CTRL + V on the keyboard. If object is a button, users can click the button (in Browse mode) to perform the desired function.



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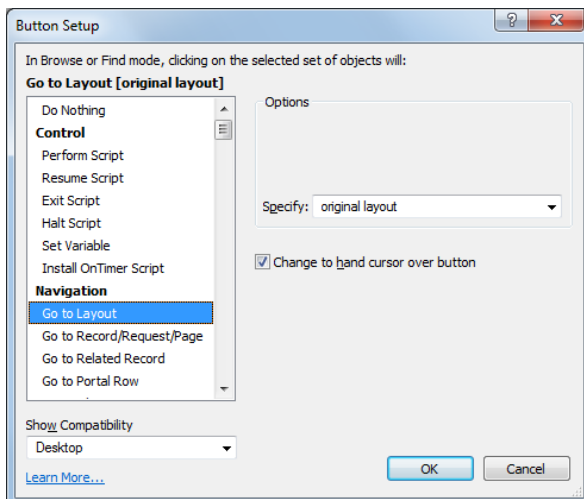
## Add a Custom Reporter Menu Button

Each time a new layout is created in the Reporter file, a button should be added to the Reporter menu. To create a Reporter menu button, complete the following steps:

- Step 1. Select the REPORTS option from the main menu.
- Step 2. Click the REPORTER (CUSTOM) REPORTS button.
- Step 3. Select the table and field desired.
- Step 4. Perform a find to access your site's **Reporter Welcome** screen.
- Step 5. From the FileMaker main menu, select the VIEW option and then LAYOUT MODE.
- Step 6. Click the Button Tool  and draw a button on the report layout. The Button Setup window will appear (see Figure 16).
- Step 7. Assign a function to the button. Choose the Go to Layout function and specify the layout by selecting a value from the drop-down list.
- Step 8. Click the OK button.
- Step 9. Enter a name for the button. Typically the button is labeled by its report title or function.
- Step 10. From the FileMaker main menu, select the VIEW option and then BROWSE MODE.

### Button Setup Window

FIGURE 16



## Sub-summary

A sub-summary part definition groups records into categories in a report. A customized report may require that a sub-summary part definition be added. For a sub-summary to function properly, the data must be sorted on a unique field value (such as *Child ID*) that is included in the report.

For example, the Presenting Problems Report below shows a report (in Browse mode) after a find has been performed for a set of records (see Figure 17).

### Presenting Problems Report

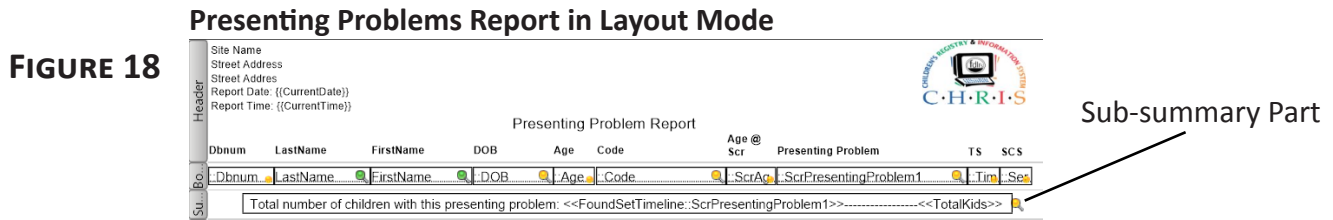
**FIGURE 17**

Presenting Problem Report									
Dbnum	LastName	FirstName	DOB	Age	Code	Age @ Scr	Presenting Problem	TS	SCS
232946	Ro	Gi	12/12/2007	6.05	CHFOUT/MigrEdProg	4.09	Developmental Concerns	ET	RIN
238033	Mu	Is	11/30/2007	6.06	TR-IV	3.02	Speech/Language Concerns	EF	FTE
239304	Wa	Ja	3/25/2008	6.02	HDSTFD	4.05	Speech/Language Concerns	ET	RIN
243521	Ja	Ad	3/13/2008	6.02	CHFOUT/MigrEdProg	4.06	Developmental Concerns	ET	RIN
249247	Re	Za	12/3/2007	6.06	CHFOUT/TR-V	3.04	Speech/Language Concerns	ET	RC
251752	Ca	Lo	8/1/2008	5.10	CHFOUT	4.01	Developmental Concerns	ET	RIN
253877	Sm	Am	1/11/2008	6.04	TrREN	3.04	Speech/Language Concerns	ET	FTE
255762	Be	Si	3/26/2008	6.02	TR-III	4.05	Speech/Language Concerns	ET	RIN
258658	Mi	Na	10/18/2007	6.07	DCF/TrCROW	3.11	Developmental Concerns	ET	RIN
260440	Ma	Aa	1/8/2008	6.04	PPEC/TrCROW	3.10	Developmental Concerns	ET	RC
261120	Ca	Ni	1/28/2008	6.04	TrMAC	3.07	Speech/Language Concerns	ET	RC
261203	Ta	Ny	3/18/2008	6.02	TrLEE	3.11	Speech/Language Concerns	ET	RC
261437	Da	Vo	5/9/2008	6.00	DCF/TrCROW	3.09	Developmental Concerns	ET	RC

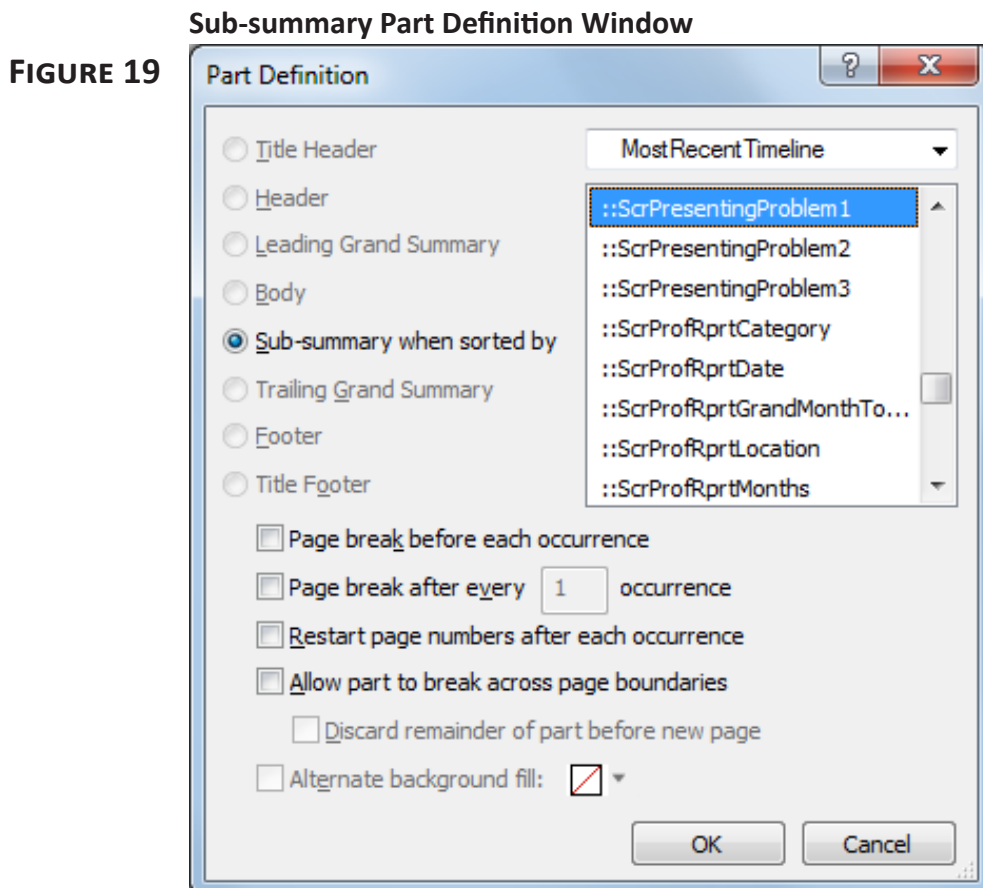
Site Name  
Street Address  
Street Address  
Report Date: 6/5/2014  
Report Time: 3:50:20 PM



In an effort to organize the data, a sub-summary part definition can be added by entering Layout mode in FileMaker Pro (see Figure 18). A sub-summary is added below the Body part definition.



When the sub-summary is added, the Part Definition window will be displayed (see Figure 19). Select a relationship (from the drop-down list) and a value (field name) on the report that will be used to categorize the data. Then, place that field (and any additional fields) within the sub-summary part in Layout mode. For more assistance on fields and relationships, see the *Reporter Relationship Help Sheet* and the **Custom Reports** section of this document.



Once a sub-summary part is added, the records are sorted by the field selected. The report will display the found set of records separated by the categorized values, which for this example is Primary Placement (see Figure 20).

**FIGURE 20**


**Presenting Problems Report with Primary Placement Sub-summary**

Presenting Problem Report									
Dbnum	LastName	FirstName	DOB	Age	Code	Age @ Scr	Presenting Problem	TS	SCS
302592	Av	An	9/8/2008	5.08	CHFOUT/MigrEdProg	4.01	Developmental Concerns	EF	FTE
302622	He	Il	6/16/2008	5.11	CHFOUT/MigrEdProg	4.03	Developmental Concerns	EF	FTE
302635	Ch	Ce	8/14/2008	5.09	CHFOUT/MigrEdProg	4.01	Developmental Concerns	ET	RIN
305750	Ha	Co	5/5/2009	5.01	QQIEIPN/TN	3.04	Developmental Concerns	ET	RFC
Total number of children with this presenting problem: Developmental Concerns-----72									
301007	Sc	St	4/24/2008	6.01	CHFOUT	4.04	Hearing Concerns	ET	RIN
302668	Ro	Da	12/8/2008	5.05	CHFOUT/MigrEdProg	3.09	Hearing Concerns	ET	RIN
Total number of children with this presenting problem: Hearing Concerns-----2									
280717	Li	Ga	12/16/2007	6.05	RCMA/TrNAR	4.02	Multi-Sensory Concerns	ET	RC
Total number of children with this presenting problem: Multi-Sensory Concerns-----1									
268598	Va	Al	1/21/2008	6.04	HDSTFD/TrCROW	3.09	Social/Personal Concerns	ET	RIN
270987	We	Ed	4/25/2008	6.01	TrCARIB	3.11	Social/Personal Concerns	ET	RIN
272354	Ja	Di	10/30/2007	6.07	TrCARIB/TestLEE	4.06	Social/Personal Concerns	EF	FTE
281727	Lo	Ye	3/26/2008	6.02	HDSTFD/TrCROW	4.00	Social/Personal Concerns	ET	RC
292639	Di	Va	9/20/2008	5.08	DCF/TrREN	3.11	Social/Personal Concerns	ET	RIN
299300	Tr	He	7/1/2009	4.11	CHFOUT/TrLEE	3.02	Social/Personal Concerns	ET	RIN
Total number of children with this presenting problem: Social/Personal Concerns-----6									
238033	Mu	Is	11/30/2007	6.06	TR-IV	3.02	Speech/Language Concerns	EF	FTE

---

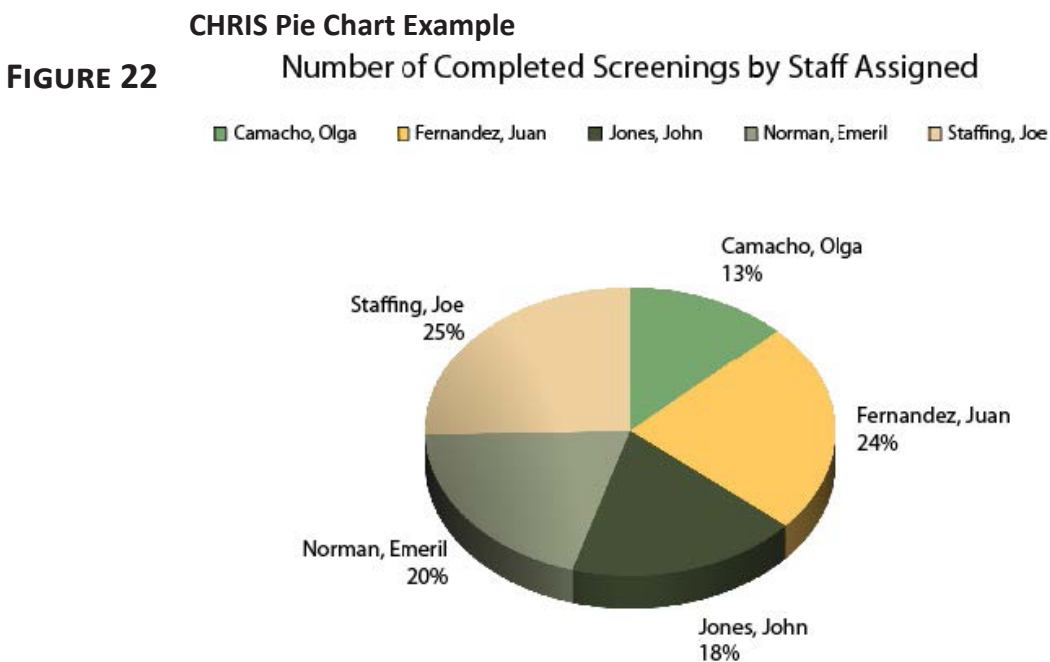
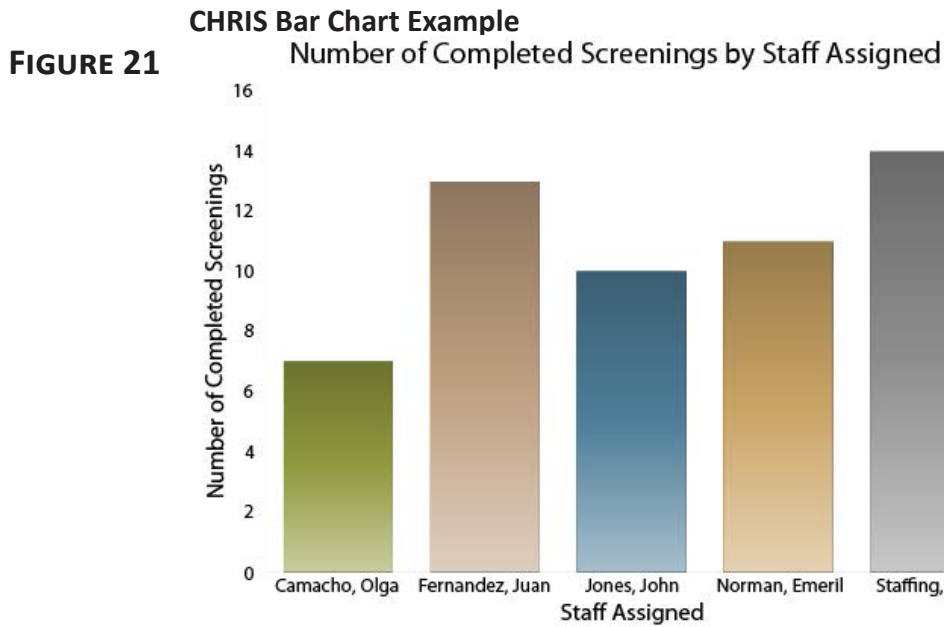
## Add a Sub-summary Sort

For this example, a sub-summary part definition is added to the report layout to sort and group records on a report.

- Step 1. From the FileMaker main menu, select the VIEW option and choose LAYOUT MODE.
- Step 2. Find the PART button on the Tool Panel, click and drag it underneath the Body part. The Part Definition window will be displayed.
- Step 3. Choose the SUB-SUMMARY WHEN SORTED BY option.
- Step 4. Click on the  arrow to select the appropriate relationship (see the *Reporter Relationship Help Sheet* for more information).
- Step 5. Scroll down the list of fields until the appropriate field name is found. Click to highlight.
- Step 6. Click the OK button.
- Step 7. Click and drag the mouse icon to select all the field values in the Body part of the report.
- Step 8. Press CTRL + C on the keyboard to copy the contents.
- Step 9. Click on an empty area of the sub-summary part and press CTRL + V on the keyboard to paste the contents. The same fields are now listed in both sections of the report.
- Step 10. Select all the field values in the Body part of the report.
- Step 11. From the FileMaker Inspector, go to the Sliding & Visibility section of the Position tab.
- Step 12. Select the SLIDING UP BASED ON option and ALSO RESIZE ENCLOSING PART option.
- Step 13. In the same window, select the HIDE WHEN PRINTING option.
- Step 14. Go to Browse mode, perform a find, view records in Preview mode, and sort on the field selected for the sub-summary part.

## Creating Charts

Creating charts is a great way to summarize and visualize data. The Chart Tool is used to graphically display data. Data can be displayed as a bar chart (see Figure 21), line chart, area chart, or pie chart (see Figure 22).

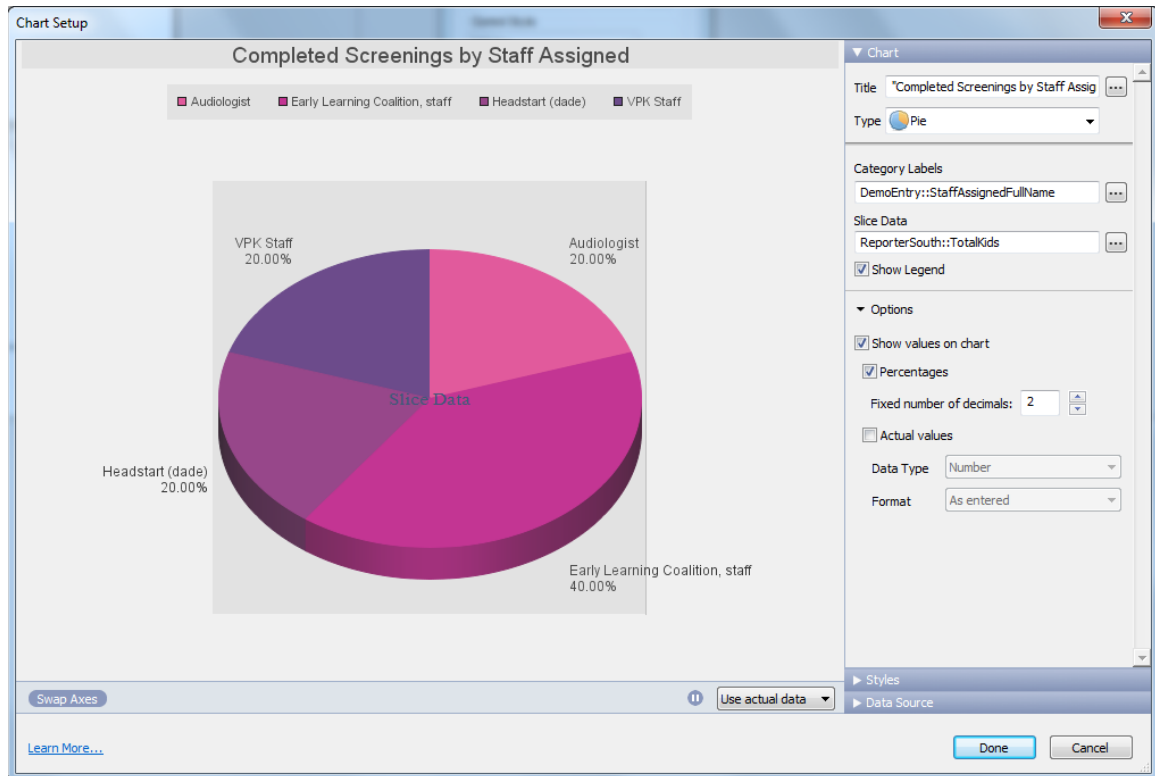


Before you create a chart, consider the data comparison you want to emphasize, then choose the chart type that will best demonstrate the comparison.

To create a chart, select the Chart Tool from the FileMaker Tool Panel and drag a box around the area of the layout where the chart should be located. Next, FileMaker will prompt you to select chart format settings and themes (see Figure 23).

### Chart Setup Window

**FIGURE 23**



Once the chart is created, you can select additional fields, include calculations, and change the appearance (chart type, color scheme, and display options). The chart you create can be saved as a layout. Then, in the future when you access your Reporter file with a different found set of records, the chart layout you created will automatically update with the current data values.

---

## Add a Chart to a Layout Manually

To add a chart to your report, complete the following steps:

- Step 1. Click on the Chart Tool from the Tool Panel at the top of the FileMaker window.
- Step 2. Draw a box with the mouse to designate where in the layout you would like the chart to be located. Then, release the mouse to display the Chart Setup dialogue box. This box will help you customize the chart.
- Step 3. Choose a Chart Type (e.g., Bar, Line, Area, or Pie) from the drop-down list. The display window allows you to sample each style before you apply it to your layout.
- Step 4. Title the chart. You can create a title or select an existing field name from the available options.
- Step 5. Identify the label and value data sources. Select the proper relationship, then select the fields that should serve as the sources of data.
- Step 6. To format your chart, click on the FORMAT CHART button below the preview window. You can change the font (style, size, color), color scheme, and background effects. You can also customize the legends and axes.
- Step 7. Once you create a chart, it will be available for use with any other finds you perform in Reporter. There is no need to recreate the chart every time you run a report in CHRIS.



***To use sub-summaries as data sources for the chart, click the “Show data points for groups of records when sorted” checkbox.***



## Table View

Table View allows users to display records or find requests in a table (see Figure 24). Each row displays a record and each column displays a field. To access Table View, select the View drop-down list from the FileMaker menu and then select the View as Table option.

Table View also provides simple sorting functionality. Click the header of the column to sort data. In Table View, fields can be added or modified and data can be saved in PDF or Excel format.

**FIGURE 24**

**Table View**

Dbnum	LastName	FirstName	DOB	TimelineStatus	ServiceCoordinati...	DemoEntry::Code	ExceptionalityStat...	CountyOfResiden...
100528	Rol	M h	1/12/2005	ET	RIN	CHFOUT		Dade
103057	Mzt	Mwt	1/17/2005	ET	RIN	QQIEIPN/TN	E	Dade
103894	Mzt	Arc	1/19/2005	ET	RIN	QQIEIPN/TN		Dade
106961	Lze	Iab	1/10/2005	ET	RIN	QQIEIPN/TN	E	Dade
110805	Dle	Ser	1/18/2005	ET	RIN	QQIEIPN/TN	N	Dade
114241	Lkn	Snn	1/12/2005	ET	RIN	QQIEIPN/TN	E	Dade
116629	Jei	Gse	1/11/2005	ET	RIN	QQIEIPS/TN	E	Dade
117920	Lze	Sai	1/12/2005	ET	RIN	QQIEIPS/TN	E	Dade
118339	Trl	Hyr	1/16/2005	ET	RIN	ESS/IT/TRSC	E	Dade
118452	Vsd	MLh	1/18/2005	ET	RIN	QQIEIPN/TN	E	Dade
118455	Kyu	Sha	1/20/2005	ET	RIN	QQIEIPN/TN	E	Dade
118476	Cot	Jni	1/14/2005	ET	RIN	QQIEIPS/TN	I	Dade
118627	Moh	Lly	1/10/2005	ET	RIN	QQIEIPN/TN	E	Dade
119732	Cot	Keh	1/10/2005	ET	RIN	QQIEIPS/TN	E	Dade
119739	Gzz	Bnn	1/11/2005	ET	RIN	QQIEIPS/TN	E	Dade
119740	Gzz	Bna	1/11/2005	ET	RIN	QQIEIPS/TN	E	Dade

---

## Add a Quick Chart to a Layout

FileMaker includes a Quick Charts option that allows you to create charts in just a few mouse clicks. To create a chart, complete the following steps:

- Step 1. Perform a find in Reporter just as if you were creating a new report.
- Step 2. Once in Reporter, choose any existing report layout to display the found set.
- Step 3. Click on the third button to the right of “View As:” on the top of the screen (see Figure 25) to display the report in table format.

### Table View Option

FIGURE 25



- Step 4. Click on the column heading to display an arrow that allows you to access a drop-down menu. Select the “Chart” option to create the chart.
- Step 5. Once the chart is created, you can select additional fields, include calculations, and change the appearance (chart type, color scheme, and display options). The chart you create can be saved as a layout. Then, when accessing Reporter with a different found set in the future, the chart layout you created will automatically update with the current data values.

# FileMaker Tools

## Creating a New Layout

The CHRIS database allows users to create fully customizable reports based on the specific reporting needs of each site or center. In order to take full advantage of this option, it is essential to have a clear understanding of the FileMaker tools at your disposal. Please complete the interactive FileMaker online training available on our website (<http://www.chris.miami.edu>) prior to creating custom reports.

The first step in creating a custom report is to create a new layout (see Figure 26). In the Custom Reporter, switch to layout mode using the FileMaker main menu VIEW option and select “New Layout/Report” under the “Layout” menu heading or click on the “New Layout/Report” button (see Figure 27).

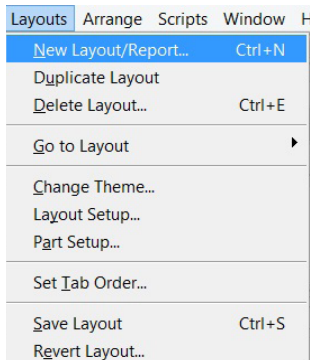
### View Option

FIGURE 26

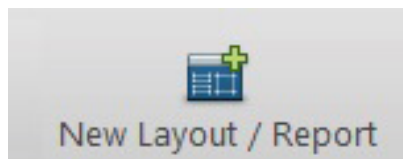


### Layout Menu

FIGURE 27



### New Layout/Report Button

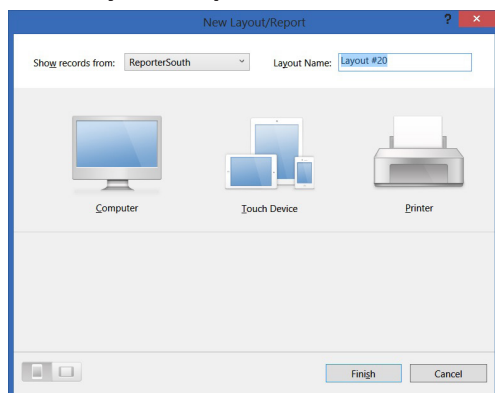


OR

You can then provide a layout name, select display media and choose output format or create a blank layout by clicking continue without making any other selections (see Figure 28).

### New Layout/Report Menu Window

FIGURE 28



---

## Layout Parts

A new layout contains three parts--a Header, a Body, and a Footer (see Figure 29).

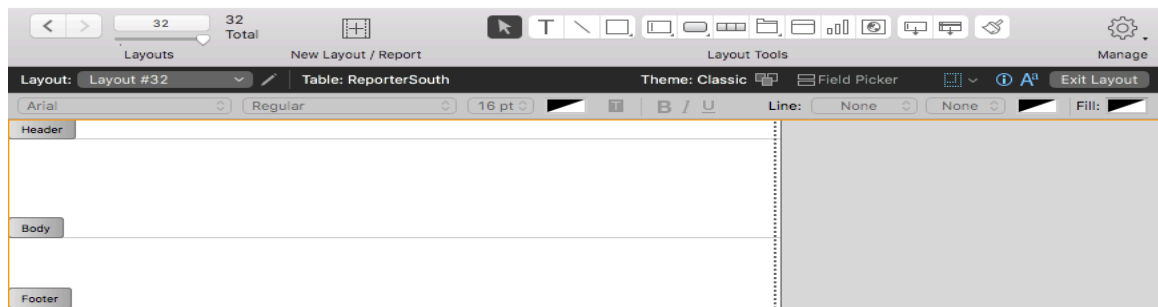
- The Header part displays contents that appear at the top of every screen or page. The Header is generally used for titles or column headings.
- The Body part displays fields, text objects, and graphics for each record in the found set.
- The Footer part displays contents at the bottom of every screen or page. The page number, current date, or final notes useful to understanding a report can be placed in the footer part.

Other parts can be added depending on need.




- A Title Header part displays contents only once on the first screen or printed page.
- A Title Footer part displays contents only once at the bottom of the first screen or page.
- Sub-summary layout parts are used to include data such as subtotals, grand totals, averages, and counts. (Sub-summaries will be discussed in greater detail later in the course.)

### Layout Parts

FIGURE 29



Once a new layout has been created, you can begin the process of creating your report. Some of the most commonly used tools are below.

- The Text Tool  is used for adding text to a layout. This tool can be used to create a title as well as a heading for each field to be included in the report.
- The Field Tool  is used for placing and removing fields on a layout. This tool is useful for adding fields to the body part which can come from any table in the CHRIS database. Click the “Create Label” option to name the fields on the layout.
- The Part Tool  is used for adding a layout part. This tool can be used to add a Trailing Grand Summary that shows the total number of records in your found set.

# Inspector

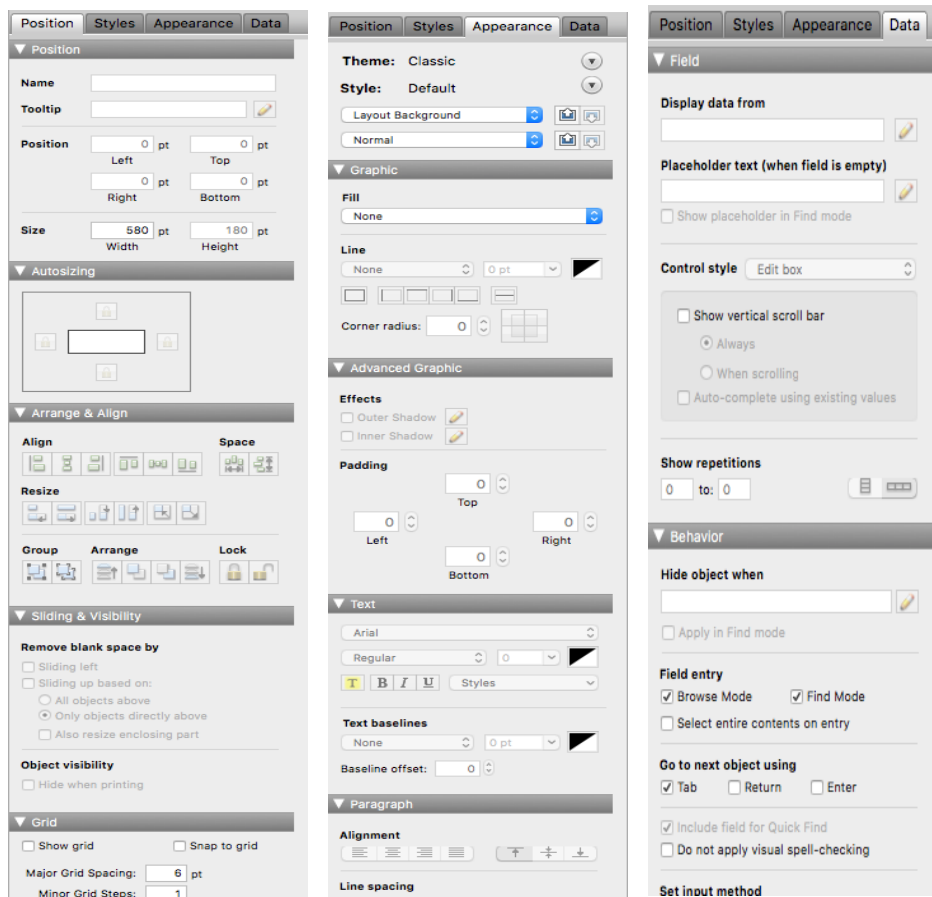
The “Inspector” is a very useful tool that allows you to view and edit the settings for objects in a layout. It can be opened by clicking on the “i” icon in the top right of the screen while the program is in layout mode or by choosing “Inspector” under the View FileMaker menu.

Three tabs separate the possibilities of making changes to the position, appearance, or data in objects (see Figure 30).

- The Position tab allows you to set the object’s size, align objects, and remove blank spaces in the layout. The object visibility section can be used to hide an object when printing. This is great when adding notes or buttons that don’t need to be in the final printed document.
- The Appearance tab allows you to set the color, paragraph alignment, and background style of your layout.
- The Data tab allows you to set the source, format, and behavior of the fields in the layout.

## Inspectors

FIGURE 30



## Layout Options

Once you have placed fields on the new layout and formatted them accordingly, you can use the “View As” buttons while in browse mode. Form View (Figure 31) displays one record at a time. List View (Figure 32) displays records in a list format. Table View (Figure 33) displays records in a tabular format like a spreadsheet. Each record appears in a row, and each field appears in a column.

FIGURE 31

**Form View**

**New Report**

FirstName	LastName	DOB	Staff Assigned	Ref 4 Scr Date
Yov	Cne	2/25/2009	Ris	

TotalKids 263

Report run on: 12/11/2013 P: ?

FIGURE 32

**List View**

**New Report**

FirstName	LastName	DOB	Staff Assigned	Ref 4 Scr Date
Yov	Cne	2/25/2009	Ris	
Pon	Son	2/15/2009	Ris	1/22/2008
Iio	Nez	2/25/2009	Pca	
Cna	Hez	2/8/2009	Cne	1/23/2008
Din	Tge	2/28/2009	Ris	
Cer	Von	2/25/2009	Ris	2/21/2008
Mel	Plo	2/1/2009	Ris	1/22/2008

FIGURE 33

**Tabular View**

**New Report**

::Dbnum	::FirstName	::LastName	::DOB	::ScrReferr...	+
108376	Yov	Cne	2/25/2009		
109338	Pon	Son	2/15/2009	1/22/2008	
109609	Iio	Nez	2/25/2009		
110807	Cna	Hez	2/8/2009	1/23/2008	
110867	Din	Tge	2/28/2009		
110881	Cer	Von	2/25/2009	2/21/2008	
111806	Mel	Plo	2/1/2009	1/22/2008	
114321	Aai	Oiz	2/7/2009		
116187	Bon	Vin	2/16/2009	1/30/2008	
116591	Jan	Cbb	2/10/2009		

## Tool Panel

The Tool Panel (see Figure 34) is used to place objects on a layout. Click a tool button to activate that option and it will appear recessed in the Tool Panel. The mouse pointer will change to represent the option selected. See Table 3 for a description of the tool options available.
















### Tool Panel Section

FIGURE 34



Tool Panel Description Table

TABLE 3

Tool Option	Function
Selection Tool 	Selects, moves, and resizes objects
Text Tool 	Types or selects text
Line Tool 	Draws straight lines: horizontal, vertical, or diagonal
Rectangle Tool 	Draws rectangles or squares
Rounded Rectangle Tool 	Draws rectangles or squares with rounded corners
Oval Tool 	Draws ovals or circles
Field/Control Tool 	Adds a field or control and chooses its display type
Button Tool 	Creates an interactive button that performs specified commands from a script in Browse or Find modes
Tab Control Tool 	Adds a tab control to a layout (to organize objects and make data entry easier)
Portal Tool 	Creates a portal (display records from related tables)
Chart Tool 	Creates a chart on the layout
Web Viewer Tool 	Adds a web viewer to display a web page on a layout
Field Tool 	Adds field objects to a layout
Part Tool 	Adds parts to a layout, such as a header, body, or footer
Format Painter Tool 	Copies formats from objects and applies them to selections

---

## Part Tool

The Part Tool is used to add parts to a layout, such as a header, body, footer, or sub-summary (see Figure 35). A layout part organizes and summarizes the information displayed in the section.

### Part Tool Section

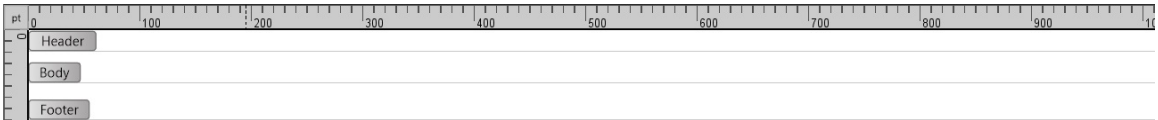
**FIGURE 35**



Every layout must have at least one part. Layout parts can contain fields, portals, buttons, text, and other objects. In Layout mode, dotted horizontal lines mark the division between layout parts, and the Part Label appears to the left of the dividing line (see Figure 36).

### Layout Parts Section

**FIGURE 36**



Layout parts may be dragged onto the layout. To drag a part, hold down the left mouse button and the arrow will display a plus sign. When the mouse pointer is on the layout, let go of the left mouse button and the Part Definition window will appear. Select an option to define the layout part. See Table 4 for a description of the part options available.



**Layout Part Table**

**TABLE 4**

Part Options	Function
Title Header	Appears only once at the top of the first screen or page and replaces the normal header. In reports, it can be used to print a separate title page. Only one in each layout.
Header	Appears at the top of every screen or page. It can also be used for titles or column headings (in columnar reports). Only one in each layout.
Body	Appears in the middle of every screen or page. Each object placed in the body, including fields, text objects, and graphics, appears once for each record in the found set. Only one in each layout.
Footer	Appears at the bottom of every screen or page. Only one in each layout.
Title Footer	Appears only once at the bottom of the first screen or page and replaces the normal footer. Only one in each layout.
Grand Summary	Appears at the beginning (leading) or end (trailing) of the report, depending on its placement on the layout. Summary information is displayed for all records in the found set. Only one in each layout.
Sub-summary	Appears before or after the body part. Sub-summary information is displayed for each subset of records sorted by a specified field. Can have multiple Sub-summary parts in each layout.

## Field Tool

The Field Tool is used to add field objects to a layout (see Figure 37). Field objects may be placed anywhere on the layout by dragging them to the desired position. When positioned over the Field Tool, hold down the left mouse button while dragging to move the object. Upon reaching the desired position, release the left mouse button. Borders and text baselines will appear to assist with the alignment of objects on the layout. Choose a field name from the drop-down list of options in the Specify Field dialog box.

### Field Tool Section

**FIGURE 37**



### Field Control

To replace a field on a layout, double-click the field and select another field name. To delete a field from a layout, select the field by clicking on it once and press the delete key on the keyboard.



***Deleting a field from a layout does not delete the data from the file.***

---


## Adding Text and Fields to a Layout

For this example, text and fields will be added to a layout.

- Step 1. Select the REPORTS option from the main menu.
- Step 2. Click the REPORTER (CUSTOM) REPORTS button.
- Step 3. Select the Timeline table, event, and field desired.
- Step 4. Perform a find to access your site's **Reporter Welcome** screen.
- Step 5. From the FileMaker main menu, select the VIEW option.
- Step 6. Choose LAYOUT MODE. The FileMaker screen changes and editing tools appear at the top of the screen.
- Step 7. From the FileMaker main menu, select the LAYOUTS option.
- Step 8. Choose NEW LAYOUT/REPORT.
- Step 9. Type in "Report Test" as the name of the report.
- Step 10. Choose BLANK LAYOUT.
- Step 11. Click the FINISH button.

### Add Text and Fields

The FileMaker screen is now in Layout (or editing) mode. The user can add text, fields, and graphics to the layout to produce the desired report.

- Step 1. From the editing tools menu, click the  button. This button allows text to be added or modified within the layout.
- Step 2. Click in the white space in the Header section. Type a title for the report.
- Step 3. Click on an area in the layout where a new field will be placed.

---

Step 4. From the FileMaker main menu, select the INSERT option.

Step 5. Choose FIELD.

Step 6. From the drop-down list, select the FoundSetDemo relationship and the Last-Name field. The field will be placed onto the report.

Step 7. Insert FirstName and DOB fields repeating Step 6.



*Users can also click on the FIELD button in the FileMaker side menu and drag it onto an area within the Body part of the layout to add a field.*

## Format Text and Fields

Step 1. Click on the LastName field once. (Additional fields can be selected if they will be formatted the same.)

Step 2. Select the FORMAT option from the FileMaker main menu.

Step 3. Change the FONT to "Arial."

Step 4. Change the SIZE to 14.

## Create and Format Buttons

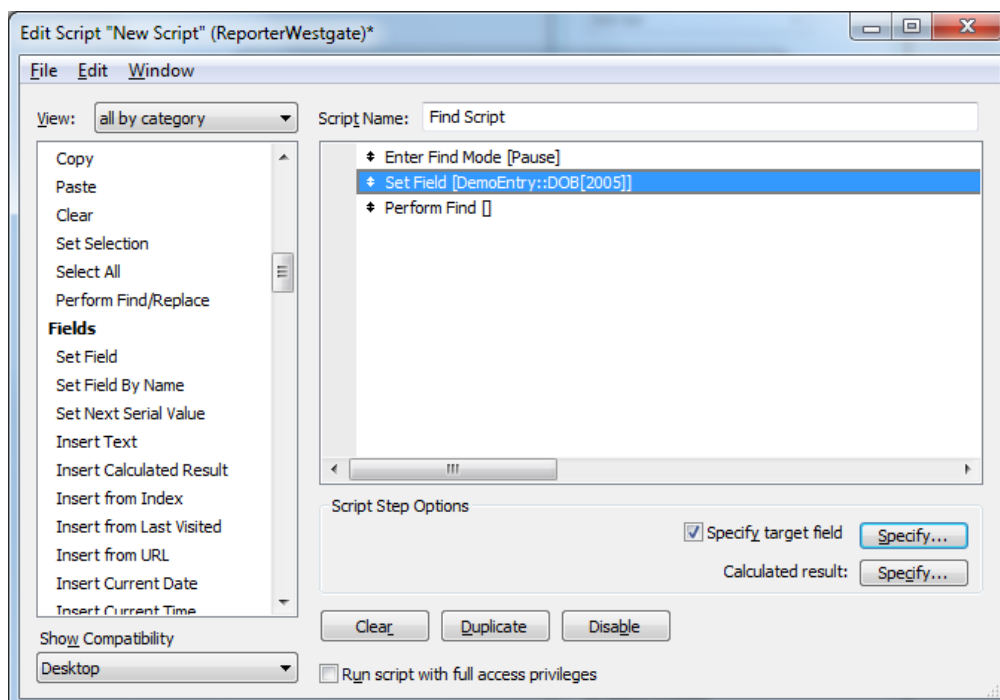
It may be useful to add buttons to a report layout to streamline the steps needed to display the desired results. Buttons can store and execute functions, such as performing a find, sorting, printing, omitting records, and more. Review the options listed below for more detail.

### Add a Find Button

- Step 1. Select the “Report Test” layout to add a FIND button.
- Step 2. From the FileMaker menu, select the SCRIPTS option, then choose MANAGE SCRIPTS.
- Step 3. Click the NEW button to create a new script.
- Step 4. Enter “Find Script” as the script name.
- Step 5. View the items on the left side of the Script Definition window (see Figure 38). Highlight Enter Find Mode and click the MOVE button (or double click on the words: Enter Find Mode). The Script selection will be displayed on the right side of the window. Unclick the *Pause* option located in the Script Step Options section.

### Script Definition Window

FIGURE 38

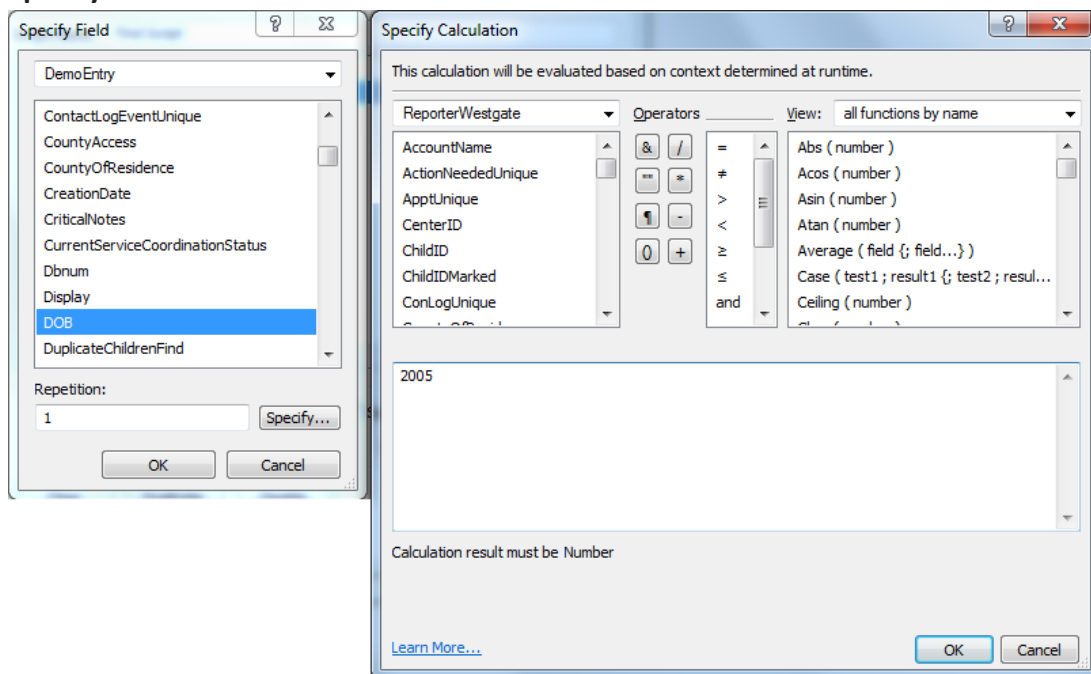


Step 6. Highlight Set Field and click the MOVE button (or double click on the words: Set Field). The Script selection will be displayed on the right side of the window (see Figure 38).

Step 7. Click the top SPECIFY button (see Figure 38) to display the Specify Field window (see Figure 39) and select the “DOB” field. Click the bottom SPECIFY button (see Figure 38) to display the Specify Calculation window (see Figure 39) and enter “2005” in the find criteria.

### Specify Find Fields Window

**FIGURE 39**



Step 8. Highlight Perform Find and click the MOVE button (or double-click on the words: Perform Find). The Script selection will be displayed on the right side of the window (see Figure 38).

Step 9. Exit the Manage Scripts screens and save the new script.

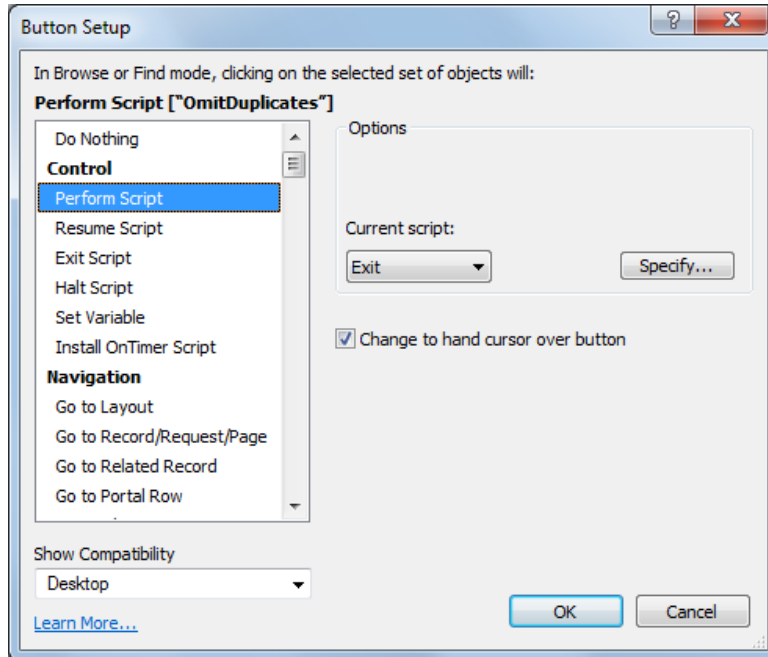
Step 10. Go to Layout mode.

Step 11. Click the Button Tool  from the Tool Panel.

Step 12. With the mouse, draw the shape of the button where it should appear in the layout. When finished, the Button Setup window will be displayed (see Figure 40).

**FIGURE 40**

### Button Setup Window



Step 13. On the left side of the Button Setup window, choose Perform Script. On the right side, click SPECIFY and choose the “Find Script” script.

Step 14. Accept all the default selections and click the OK button.

Step 15. The mouse cursor will appear on the button layout. Type “Find” as the name of the button. (If you accidentally clicked on the layout and cannot edit the text on the button, click the **T** button [from the Tool Panel] and click on the button just created. This will allow the text to be modified.)

Step 16. Go to Browse mode and test the FIND button. The record set found will be the same as before because the button has saved the initial find.

## Add a Sort Button

The process of adding a SORT button to a layout in Reporter is similar to the steps described above for adding a Find button. These steps are listed below in detail.

Step 1. Select the “Report Test” layout.

Step 2. From the FileMaker menu, select the SCRIPTS option, then choose MANAGE SCRIPTS.

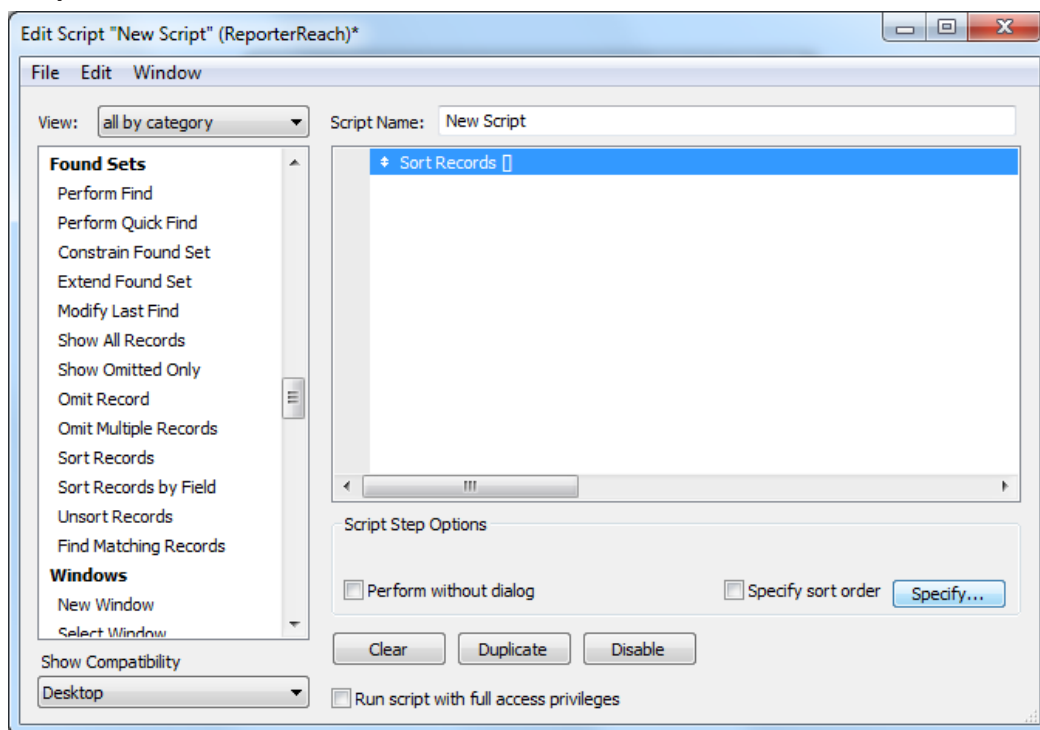
Step 3. Click the NEW button to create a new script.

Step 4. Name it "Sort."

Step 5. View the items on the left side of the Script Definition window. Scroll down and locate "Sort Records" (see Figure 41). Highlight "Sort Records" and click the MOVE button, or double click on the words "Sort Records." The Script selection will be displayed on the right side of the window. Click the *Perform without dialog* checkbox.

### Script Definition Window

FIGURE 41



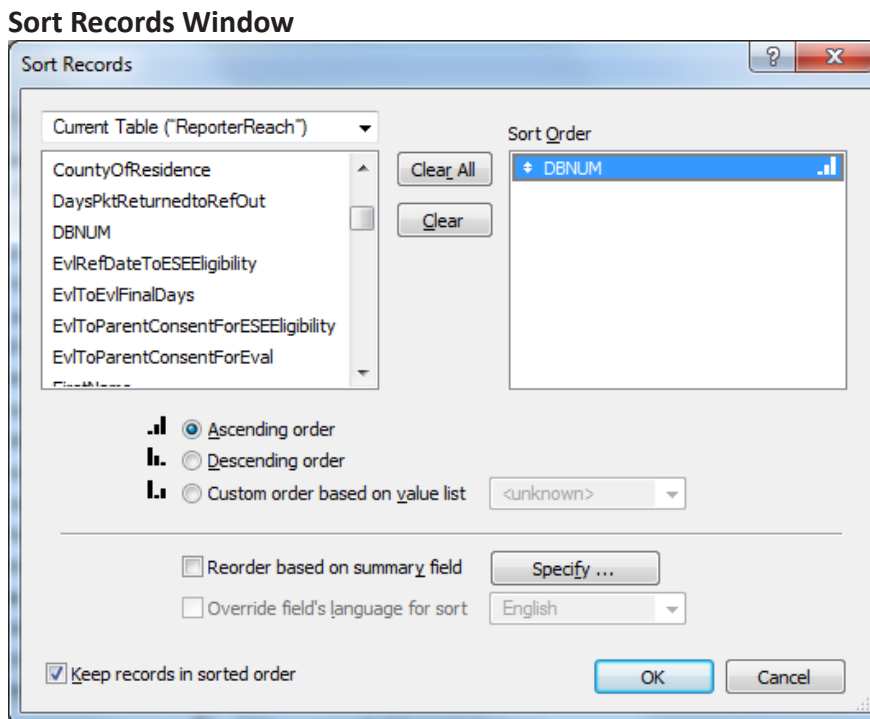
Step 6. Click the SPECIFY button (see Figure 41) to display the Sort Records window (see Figure 42) and select the "Last Name" field to sort records based on Last Name.

Step 7. Click the OK button.

Step 8. Exit the Manage Scripts screen and save the new script.

Step 9. Go to Layout mode.

FIGURE 42




Step 10. Click the Button Tool  from the Tool Panel.

Step 11. With the mouse, draw the shape of the button where it should appear on the layout. When finished, the Button Setup window will be displayed (see Figure 39).

Step 12. On the left side of the Button Setup window, choose Perform Script. On the right side, click SPECIFY and choose the "Sort" script just created.

Step 13. Accept all the default selections and click the OK button.

Step 14. The mouse cursor will appear on the button layout. Name it "Sort." (If you accidentally clicked on the layout and cannot edit the text on the button, click the  button [from the Tool Panel] and click on the button just created. This will allow the text to be modified.)

Step 15. Go to Browse mode and test the SORT button. The records found will be in the same order as before because the button has saved the initial sort order.



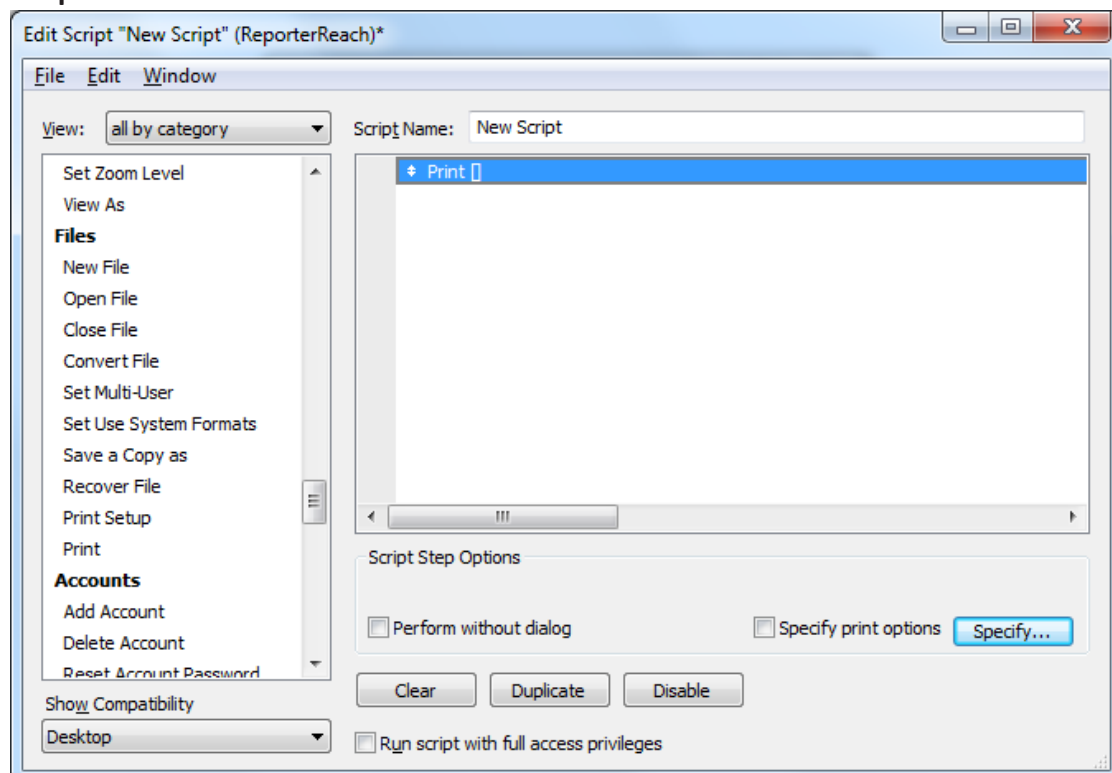
## Add a Print Button

The process for adding a PRINT button to a report layout is similar to the steps described above for adding the FIND and SORT buttons. The steps are listed below in detail.

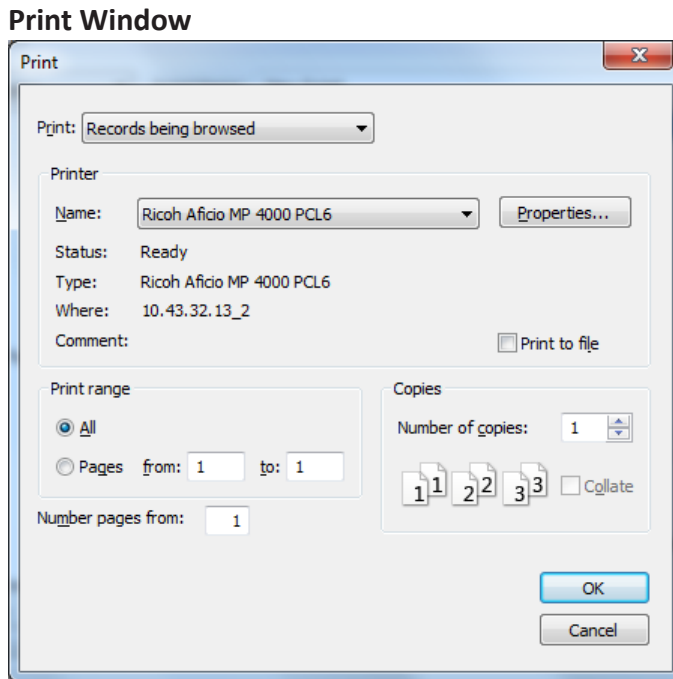
- Step 1. Select the “Report Test” layout.
- Step 2. From the FileMaker menu, select the SCRIPTS option, and then choose MANAGE SCRIPTS.
- Step 3. Click the NEW button to create a new script.
- Step 4. Name it “Print.”
- Step 5. View the items on the left side of the Script definition window. Scroll down and locate “Print” (see Figure 43). Highlight “Print” and click the MOVE button, or double click on the word “Print.” The Script selection will be displayed on the right side of the window.
- Step 6. Click the SPECIFY button (see Figure 43) to display the Print window (see Figure 44) and specify the printer settings to print 2 copies.

### Script Definition Window

FIGURE 43



**FIGURE 44**



Step 7. Click the OK button.

Step 8. Exit the Manage Scripts screen and save the new script.


Step 9. Go to Layout mode.

Step 10. Click the Button Tool  from the Tool Panel.

Step 11. With the mouse, draw the shape of the button where it should appear on the layout. When finished, the Button Setup window will be displayed (see Figure 43).

Step 12. On the left side of the Button Setup window, choose Perform Script. On the right side, click SPECIFY and select the “Print” script just created.

Step 13. Accept all the default selections and click the OK button.

Step 14. The mouse cursor will appear on the button layout. Name it “Print.” (If you accidentally clicked on the layout and cannot edit the text on the button, click the  button [from the Tool Panel] and click on the button just created. This will allow the text to be modified.)

Step 15. Go to Browse mode and test the PRINT button.

---

# Sample Advanced Report

## Referrals by Time Elapsed Report

For this example, a Referral by Time Elapsed report will be created and saved as a PDF. This report will show the number of days elapsed between Referral for Evaluation and ESE Eligibility.

Step 1. Select the REPORTS option from the main menu.

Step 2. Click the REPORTER (CUSTOM) REPORTS button (see Figure 2).

Step 3. Select the fields as follows (see Figure 4):

- Table - Timeline
- Event - Referral for Evaluation
- Field - EvlReferralforEvaluationDate
- Value - 07/2017

Step 4. Click the Perform Find button to access your site's **Reporter Welcome** screen. (Figure 12 shows a sample screen from FDLRS South. The Welcome layout is fully customizable based on site needs.)

Step 5. Switch to LAYOUT MODE using the FileMaker main menu VIEW option. The FileMaker screen changes and editing tools appear at the top of the screen.

Step 6. From the FileMaker main menu, select the LAYOUTS and click on NEW LAYOUT/REPORT (see Figure 27).

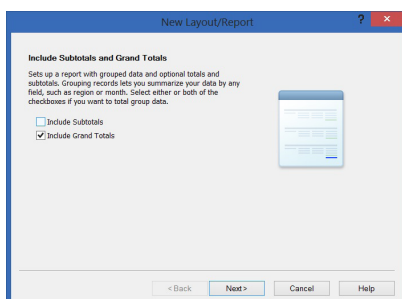
Step 7. The New Layout/Report window will appear (see Figure 28).

- Type in "ReferralsbyTimeElapsed" as the name of the report.
- Choose "Computer."
- Choose "Report" as the type of report.
- Click "Continue."

Step 8. Uncheck "Include Subtotals" for the purposes of this report since it is not needed (see Figure 45).

### Include Subtotals and Grand Totals Window

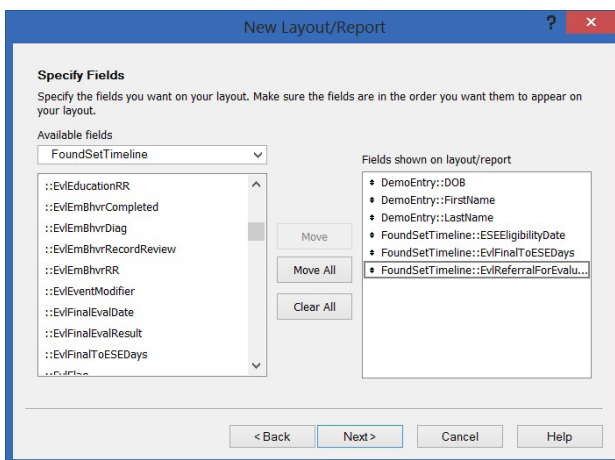
**FIGURE 45**



- Step 9. Click the “Next” button, which will take you to the Specify Fields window (see Figure 46).
- Step 10. Select “DemoEntry” from the drop-down menu to show the correct fields.
- Step 11. On the left side showing the field names select DBNUM.
- Step 12. Holding down the Ctrl key select LastName, First Name, and DOB.
- Step 13. Click the “Move” button.
- Step 14. Select “FoundSetTimeline” from the drop-down menu used in Step 10. (Changing the relationship will give access to all Timeline table fields for the report.)
- Step 15. On the left side showing the field names select EvlReferralForEvaluationDate.
- Step 16. Holding down the Ctrl key select ESEEligibilityDate and EvlFinalToESEDays.
- Step 17. Click the “Move” button. Figure 46 below is what the New Layout/Report window will look like at this point with all fields to be displayed on the report shown.

### Specify Fields Window

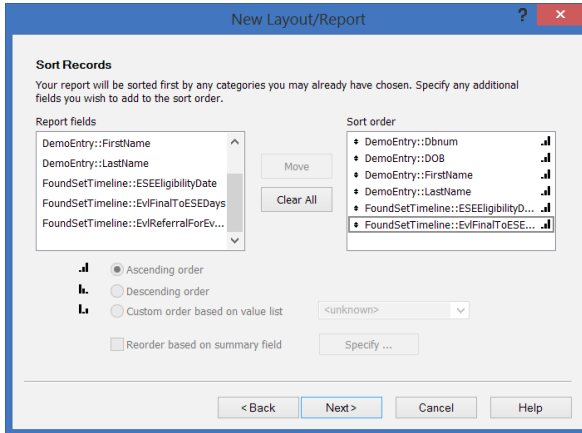
**FIGURE 46**



- Step 18. Click “Next.”
- Step 19. Click “Next” once more to show the Sorting options for your report (see Figure 47).

## Specify Fields Window

FIGURE 47

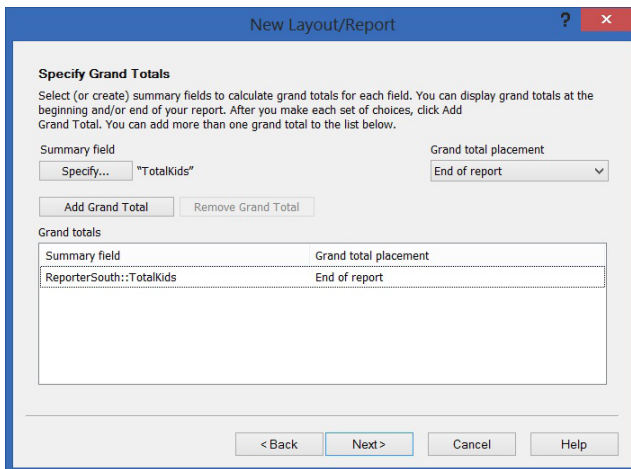


Step 20. Select DemoEntry::DBnum from the left and move it to the right. This will sort the report by DBnum automatically when that layout is accessed.

Step 21. Click “Next” to show the Specify Grand Totals window (see Figure 48).

## Specify Grand Totals Window

FIGURE 48



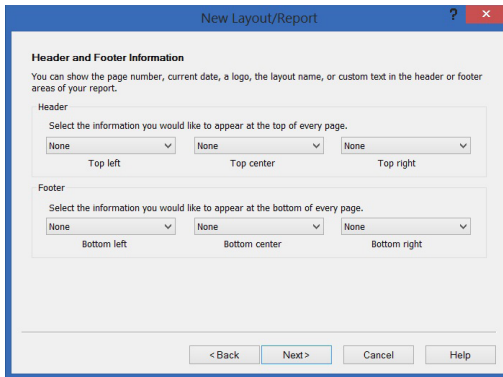
Step 22. Click the “Specify” button and select “TotalKids” field.

Step 23. Click the “Add Grand Total” button (see Figure 48). The total number of children in the found set will now display at the end of this report.

Step 24. Click “Next” to show Header and Footer Information (see Figure 49). Here you can select items to be displayed, such as current date or page number, but this is optional depending on your site’s needs.

**FIGURE 49**

**Header and Footer Information Window**

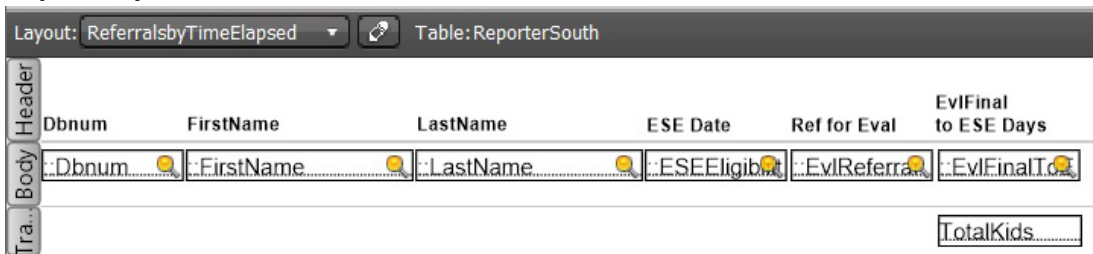


Step 25. Click "Next."

Step 26. Click "Finish." You have now created the basis of your report (see Figure 50).

**Report Layout Window**

**FIGURE 50**



**Once the basis of your report is created, you can use tools included in this manual to make the report fit your needs. Some options include:**

- Adding and modifying fields and text (pages 36-37)
- Adding preprogrammed buttons (pages 16-18)
- Adding sub-summary parts (pages 20-22)
- Adding a Chart (pages 24-28)
- Creating you own functional button (pages 38-44)


**Adding and Modifying Text (pages 36-37)**

Reports can be customized based on site’s needs. For this example, we will add the CHRIS logo and modify some of the text.

Step 1. Increase the height of the Header Part to 75 by using the Inspector Position tab in order to make room for the logo and heading.

Step 2. Select all heading values by holding the Ctrl key and clicking on each.

Step 3. Using the down arrow, lower the heading values to line up with the Header line.

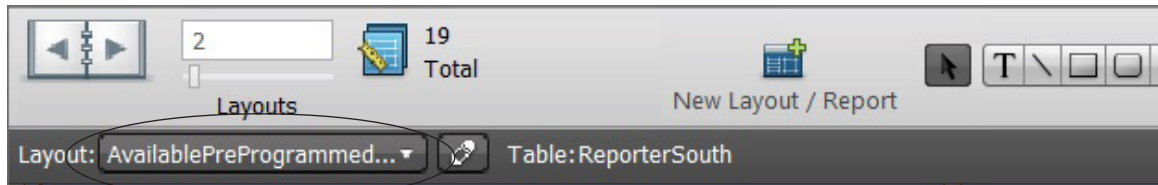
Step 4. From the editing tools menu, click the  button.

Step 5. Place the cursor in the empty space above the heading values and type “Referrals by Time Elapsed.” Use your left and right arrows to move to the desired location on the report.

Step 6. Change layouts to “Available Preprogrammed Buttons” by clicking on the layout dropdown (see Figure 51). The Available PreProgrammed Buttons layout contains the CHRIS logo as well as some fully functional buttons ready to be copied to your report.

### Layout Dropdown Menu


**FIGURE 51**



Step 7. Select the CHRIS Logo on that layout by clicking on it. Press Ctrl-C to copy.

Step 8. Change layouts back to “ReferralsByTimeElapsed” following Step 6 above.


Step 9. Place cursor in the Header part and press Ctrl-V to paste. Use your left and right arrows to move the logo to the desired location on the report.

Step 10. Click on the  button and place the cursor in the TrailingGrandSummary part.

Step 11. Type “Total Number of Children” and move it using the left and right arrows to line it up with the TotalKids field (see Figure 52).

### Referrals By Time Elapsed Report

**FIGURE 52**




Referrals By Time Elapsed

Dbnum	FirstName	LastName	ESE Date	Ref for Eval	EvIFinal to ESE Days
229972	Mickey	Mouse	7/15/2013	7/5/2013	10
230529	Minnie	Mouse	7/3/2013	7/1/2013	2
231742	Donald	Duck	7/24/2013	7/20/2013	4
Total Number of Children					3

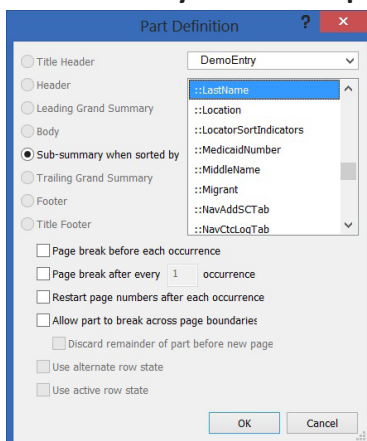
## Adding Sub-summary Parts (pages 20-22)

For this example, we will group the report by last name. This can be done by adding a sub-summary part. Remember, records in the found set must be sorted by last name in order for the sub-summary part to display correctly.

- Step 1. From the FileMaker main menu, select the VIEW option and choose LAYOUT MODE.
- Step 2. Find the PART button on the Tool Panel, click and drag it underneath the Body part. The Part Definition window will be displayed (see Figure 53).
- Step 3. Choose the SUB-SUMMARY WHEN SORTED BY option.
- Step 4. Click on the  arrow to select the “DemoEntry” relationship.
- Step 5. Scroll down the list of fields to select “Last Name.” Click to highlight.
- Step 6. Click the OK button (see Figure 53).


### Sub-Summary Relationship Window

FIGURE 53



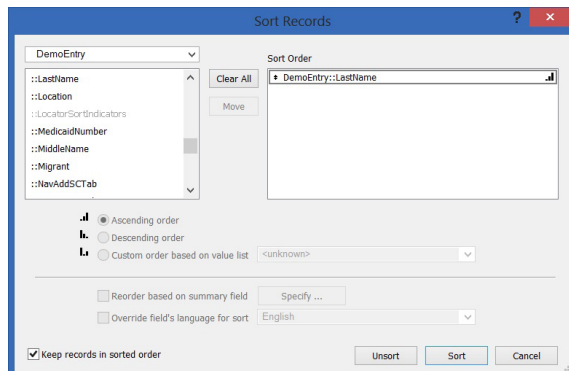
- Step 7. Select “Total Kids” field in the TrailingGrandSummary part. By placing the Total Kids field in the sub-summary part of the layout it will display the total number of children with the same last name.
- Step 8. Copy the field using Ctrl-C and paste in the sub-summary part using Ctrl-V.



- Step 9. Click on the  button and place the cursor in the sub-summary part.
- Step 11. Type “Number of Children with the same last name” and move it using the left and right arrows to line it up with the TotalKids field.
- Step 12. From the FileMaker main menu, select the VIEW option and choose BROWSE MODE.
- Step 13. Sort records by Last Name choosing SORT RECORDS from the FileMaker RECORDS option (see Figure 54).

### Sort Records Window


FIGURE 54



- Step 14. From the FileMaker main menu, select the VIEW option and choose PREVIEW MODE (see Figure 55). This is the final report.

### Sub-Summarized Referrals By Time Elapsed Report

FIGURE 55

					
Referrals By Time Elapsed					
Dbnum	FirstName	LastName	ESE Date	Ref for Eval	EvIFinal to ESE Days
231742	Donald	Duck	7/24/2013	7/20/2013	4
Number of Children with the same last name: 1					
229972	Mickey	Mouse	7/15/2013	7/5/2013	10
230529	Minnie	Mouse	7/3/2013	7/1/2013	2
Number of Children with the same last name: 2					
Total Number of Children					3

