

CHRIS Web Reports & Forms Tip Sheet

This guide was created to assist in navigating through the Reports and Forms sections of CHRIS Web. It explains the differences a user will encounter when producing reports, forms or letters. For a full description of the new database, a Quick Start Tutorial and the CHRIS User Manual are available on the CHRIS website: chris.miami.edu.

1. Site-specific forms and letters are now accessed by selecting the “Forms” link at the top of all data entry screens.
2. The “Forms” section of CHRIS will now utilize a data entry screen. Once necessary data has been entered, a PDF of the form or letter can be downloaded directly to the user’s local Download folder or a link to the form will be emailed to the address entered into the “Send Email To” field.
3. To save a form or letter to the current user’s Documents folder, click the “Create PDF” button.
4. To email a link to the generated PDF to any email address, enter the desired email into the “Send Email To” field and then click the “Email Link” button.
5. Standard Reports, SOD (Schedule of Deliverables) Reports and Reporter (Custom) Reports are now all accessed by selecting the “Reports” option from the Main Menu.
6. Once the user selects either a Standard Report, Custom site-specific Report or SOD Report, a find screen will display requiring the user to enter find criteria.
7. The first row of the find screen will only allow the user to select the most appropriate CHRIS Data Table for the report selected.
8. The sort-order is now chosen on the find screen before the find is performed.
 - a. Users are not required to select a sort-order.
9. Users have three options once a find criteria and sort-order have been selected. (Generate Report, Generate Count and Email Link)
 - a. Generate Report: saves a PDF copy of the report to the current user’s Download folder.
 - b. Generate Count: will only provide a total number resulting from the find criteria entered on the find screen.
 - c. Email Link: will send a link to a PDF copy of the report to the email address of the user currently logged into the program. (Note: this functionality is different from “Forms”, see # 4)
10. Custom creation of layouts and reports will now be performed solely by the CHRIS Help Desk.