Show Transactions in IRIS

To review the transaction history of a specific vaccine group, trade name, and/or lot number, there is a Show Transactions report available in Idaho's Immunization Reminder Information System (IRIS). Because providers are required to account for all doses of vaccine supplied by the Idaho Immunization Program (IIP), the Show Transactions report is a useful tool to assist in researching accountability discrepancies or other transaction detail associated with the organization's IIP-supplied vaccine inventory.

How to Run a Show Transactions Report
Log into IRIS. On the left-hand side in the **Inventory** section, click *manage inventory.*

The **Manage Inventory** screen will open. Click the *Show Transactions* button.

The **Vaccine Transactions** screen will open; as shown below.

Vaccine Transactions for: 002 - IDA ROSE MEDICAL PRACTICE

Enter Date Range

Date Type: Date Transaction Entered into IRIS

Date [From]: _____   To: _____

+ Transaction Date is the date doses were removed from or added to physical inventory. This may be the vaccination date on immunization records; the transaction date entered on the Add-Edit-Modify Quantity inventory screens; the transaction date on wastage requests; or the date inventory transfers or returns were shipped, accepted or restocked. This may be different than the date that the inventory adjustment was entered into IRIS.

++ Vaccination Date range will only include transactions for immunizations given that were deducted from IRIS Inventory. Vaccination Date will not include transactions entered as an "Anonymous Dose".

Enter Report Filter Criteria

Transactions must meet **ALL** criteria entered to be included on report.

User Name: All User Names

Transaction Reason: All Transaction Reasons

Funding Source: All Funding Sources

Vaccine Group: All Vaccine Groups

Trade Name: All Trade Names

~ Lot Number: _____

~ Lot Number is optional. Leaving the Lot Number field blank will include all lot numbers that meet the selection criteria.

Users have several options for running the report, which include:
- Date Type[1]
  - Transaction Date
  - Vaccination Date
- Date Range (From and To); required fields
- Report Filter Criteria; not all fields are required
  - User Name
  - Transaction Reason
  - Funding Source
  - Vaccine Group
  - Trade Name
  - Lot Number
    - If only part of the lot number is known, then an asterisk may be used as a wild card to search for all lots that contain the known characters.
      - "U*" will yield results of all lot numbers that begin with "U".
      - "*458*" will yield results of all lot numbers that contain 458 anywhere within the number; for example, U458Z3, 458T5, UH2458, etc.

[1] Refer to the descriptions of each Date Type in the *Enter Date Range* section of IRIS for details regarding the difference in each type.

After the *Date Range* parameters have been chosen and the *Report Filter Criteria* selected, users may enter a report name in the *Enter a Report Name* field; this is optional. If a unique report name is not specified, then the report name will default to <u>Show Transactions</u>.

After a report name has been chosen, select the desired *Report Type*, Excel or PDF, from the drop-down menu then click the *Generate Show Transaction Report* button.

Vaccine Transactions for: 002 - IDA ROSE MEDICAL PRACTICE

Enter Date Range

Date Type: Date Transaction Entered into IRIS

Date [From]: 03/01/2012   To: 08/29/2016

+ Transaction Date is the date doses were removed from or added to physical inventory. This may be the vaccination date on immunization records; the transaction date entered on the Add-Edit-Modify Quantity inventory screens; the transaction date on wastage requests; or the date inventory transfers or returns were shipped, accepted or restocked. This may be different than the date that the inventory adjustment was entered into IRIS.

++ Vaccination Date range will only include transactions for immunizations given that were deducted from IRIS Inventory. Vaccination Date will not include transactions entered as an "Anonymous Dose".

Enter Report Filter Criteria

Transactions must meet <u>ALL</u> criteria entered to be included on report.

User Name: All User Names

Transaction Reason: All Transaction Reasons

Funding Source: All Funding Sources

Vaccine Group: All Vaccine Groups

Trade Name: All Trade Names

~ Lot Number: U*

~ Lot Number is optional. Leaving the Lot Number field blank will include all lot numbers that meet the selection criteria.

Generate Report or Return to Manage Inventory

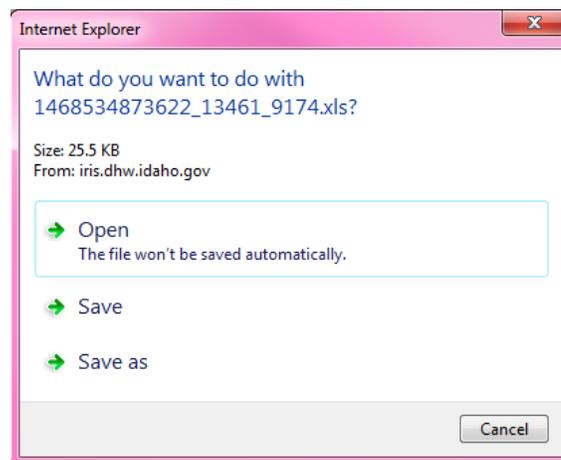**Generate Show Transactions Report...**

Enter a Report Name (Optional): U*

Report Type: excel / pdf

Generate Show Transaction Report

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After the *Generate Show Transaction Report* button has been clicked, users will be redirected to the *Show Transaction Report Request* screen shown below. While the report is being generated, the *Status* will indicate "In Progress". Once the report is complete, the *Status* will indicate "Done". To open the report, click on the report name hyperlink located in the *Report Name* column.

Show Transaction Report Request

Return to Enter Show Transaction Criteria screen... | Return to Enter Transaction Criteria |

Show Transaction Output Status | Refresh |

Report Name	Target From	Target To	Started	Completed	Type	Status
U*	03/01/2012	08/29/2016	08/29/2016 03:34 PM	08/29/2016 03:34 PM	Excel	Done

If excel was selected as the *Report Type*, then the following pop-up window will open to confirm if users would like to Open, Save, or Save As. Select the appropriate choice to meet the specific needs of the organization.

Internet Explorer

What do you want to do with
1468534873622_13461_9174.xls?

Size: 25.5 KB
From: iris.dhw.idaho.gov

→ Open
The file won't be saved automatically.

→ Save

→ Save as

Cancel

Regardless of whether Open, Save, or Save As is chosen in the previous step, the Excel spreadsheet will contain two worksheets specified below that include the following information:

- Show_TransactionsEXCEL
    - Organization Name
    - Transaction Date
    - Vaccine
    - Trade Name
    - Lot Number
    - Funding Source
    - Quantity
    - Transaction Reason
    - Vaccination Date
    - Patient Name

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- o   Patient DOB
- o   Manage Inventory Explanation
- o   Detail
- o   Wastage and Return Provider Comment
- o   Wastage and Return State Comment
- o   Date Entered Into IRIS
- o   User Name
- o   Transaction ID

- Show_TransactionsEXCEL 2
  - o   Report Filter Criteria entered to run the report

The report results may be filtered and/or sorted per the preferences of the organization.

If pdf was selected as the *Report Type*, then depending on your computer's internet browser settings, you will either be redirected to the Vaccine Transaction Report or a new window will open to display report.

Please note that the PDF report type includes only the following information:
- Organization Name
- Transaction Date
- Lot \ Trade Name
- Type
  - o   See Transaction Code near top of report for transaction description details
- Qty (quantity)
- Patient Name
- DOB

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