



Meet our expert - James Arthur

Who am I?

I'm James. Living in Hereford, I have been a part of the Practice Engine Team for 11 years now. I sit within the Professional Services Team.

What can I help you with?

My focus is all about helping you create bespoke reports for your clients.

Why is IRIS Practice Engine so brilliant for reporting?

This is really one of our big strengths that we can help you with. Anything you enter into IRIS Practice Engine, anything you see, can be reported on.

Anything at all can be reported on?

Yes. From Client Details to Staff Budgets, from Attributes to Credit Control, from Recovery Rates to Recurring Fees. It's all data stored within the database and can be reported on in all manner of ways.

Is reporting more than just lists of information?

Yes, absolutely. There is logic to our reports. Each dataset we provide will have a series of properties. A way of sorting and grouping the data

What examples do I have?

To start with, a simple list of Fees per month can become a list of Fees broken down by a client's Industry or Fees by a Clients Group. Essentially any data can be broken down, grouped and sorted by anything (within reason). It's a way of looking at something at a point in time.

What about Partner's Charge out rates and Staff Budgets?

Both of these points are examples of what I'm talking about above. It could be a Partner's charge out rate as of two years ago or staff budgets entered three years ago. Any data that has been entered since the client started with Practice Engine can be reproduced into a report.

Are the reports flexible?

Yes, totally. We offer the flexibility to produce these datasets as standard PDF report or they can be exported into Microsoft Excel, so that the data can be more easily manipulated. And then subsequently, provide to ability to reimport the updated dataset back into the System through the web front end. Reports can also be exported into Word(DOC), Text(TXT) or as a .CSV file.

How about less traditional reporting methods?

Let's look at Special Portfolios. These provide the ability to view data within the web front end, without the need to export to PDF or Microsoft Excel. With a Special Portfolio you can view a top level of data and drill down into the data multiple times to view the bottom level.

What are the examples?

- > Client Partner Fee Portfolio
Top Level
- > Client Manager Fee Portfolio
Second Level
- > Client Group Fee Portfolio
Third Level
- > Client Fee Portfolio
Fourth Level
- > Jobs making up the fees Portfolio
Bottom Level

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Can Special Portfolios be designed to action bulk updates?

Yes, they certainly can. For example, you could have a Special Portfolio providing the data on clients with a specific attribute. This could have the same drill down style if required but at the bottom level the portfolio can be designed to update the details of the attribute, a numeric value, date or text

Can we tie in with Microsoft Power BI?

Yes, we are able to curate data for Power BI and can create the datasets required for use within it.

How do we do that?

You would simply need to open the dataset in Power BI and create and customize the report to your hearts content.

What about linking with other tools?

There's a host of other tools we can curate data for, including:

- > Excel
- > Tableau
- > any other data insight tool
- > any import function

What about a transaction list showing VAT?

Yes, we can even do this for a transaction list showing VAT, for import to a nominal ledger.

Anything else?

Yes. Two examples:

- > A client list with marketing properties, for import to an email marketing automation product.
- > Budget vs Actual for a KPI Dashboard tool.

So, all in all, IRIS Practice Engine covers a massive range of reporting requirements?

Yes, you've got it. And what I've described here is only the beginning.

How can you find out more?

I'd be very happy to call you to discuss it further. Drop me a line on practiceengine@iris.co.uk or give me a ring on 0344 264 2414. You can also visit the web pages [here](#).