

Discrimination Complaint Tracking System Joined Report Instructions

Combine Different Report Types in a Joined Report

The joined report lets you see different types of information, and different report types, in a single report. For example, here is a simple joined report showing the two report types CASES WITH DCTS COMPLAINTS *and* CASES WITH DCTS PARTIES. This joined report allows us to see a case’s complaint and outcome information *and* a case’s party information in one single report.

Cases with DCTS Complaints

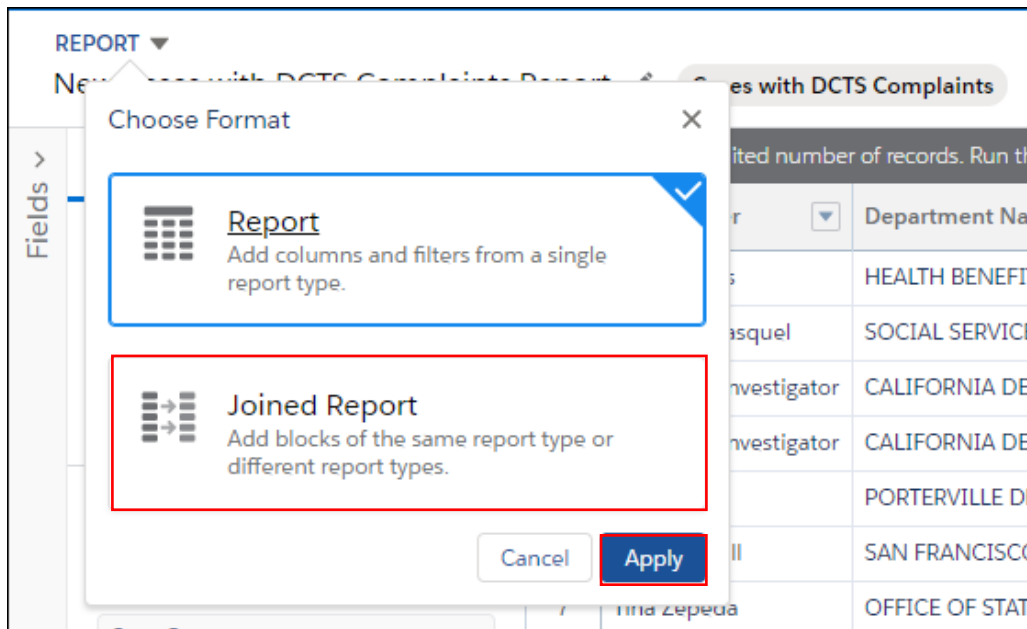
Cases with DCTS Parties

Case Number ↓	Department Name	Date Received	Complaint Type(s)	Protected Category	Complaint Outcome	DCTS Party: Record Type	DCTS Party: Party Name
00001087	KITTENS, OFFICE OF	10/14/2019	Discrimination	Age	Unsubstantiated	Witness	Coco Chanel
						Complainant	Beverly Crusher
						Respondent	Mr. Roadrunner
00001086	JAYWALKER APPEALS, OFFICE OF	8/13/2019	Discrimination; Harassment	Race	Unsubstantiated	Complainant	Fred Flintstone
						Attorney	Rumpelstiltskin
						Respondent	Shaggy Rogers
00001085	FLYING VEHICLES, DEPARTMENT OF	12/2/2019	Harassment	Sexual Harassment	Substantiated	Union Representative	Donald Duck
			Harassment	Sex/Gender	Substantiated	Union Representative	Mickey Mouse
						Respondent	Dinah Soars
						Complainant	Jane Doe

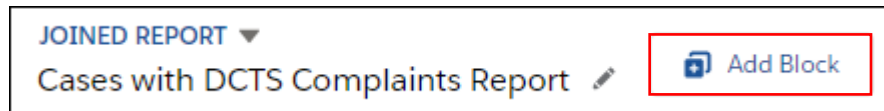
To create a joined report:

1. From the Reports tab, click **New Report**.
2. Choose your first report type and click **Continue**.
 - a. The report type you choose becomes the joined report's principal report type. The principal report type determines how common fields shared by different report types in a report are named.

3. The report opens in the report builder. To turn it into a joined report, click **Report** ▼ | **Joined Report** | **Apply**.



4. To add another report type to the joined report, click **Add Block**.



- a. Choose a report type.

Choose Report Type

Cases with DCTS Complaints
Cases with Actions against Respondents
Cases with Actions against Respondents and Respondent
Cases with Post Investigation Activities
Cases with DCTS Settlements / Judgements
Cases with Case Team Members
Tasks and Events
HTML Email Status
Activities with Departments
Activities with Contacts
Activities with Cases

Include default columns

- a. If you'd like to include standard columns for this report type, leave **Include default columns** checked. If you'd like to add an empty block, uncheck **Include default columns**. In either case, you can customize the block after adding it by adding or removing columns.
- b. Click **Add Block**.

2. Customize the joined report with columns, groups, filters, and formulas.
3. Click **Save** and name the report.
4. Click **Save**.
5. To run the report, click **Run**.

*You may join up to 5 report types in a joined report.