IRIS Training 2018 - 2022

Phase 2
April – May 2018
AGENDA

10:30 : 11:10  Introduction – update on system development and timelines
11:10 : 12:10  CRM Navigation & System Views & Filtering Data
12:10 : 12:40  Advanced Find
12:40 : 13:00  System Charts
13:00 : 13:40  Lunch Break
13:50 : 14:50  New System Reports
14:50 : 15:30  Data Quality
15:30 : 16:00  Customer Service Hub - Dashboards
16:00 : 16:30  Questions & Evaluation – Lot specific Queries
Welcome to System Views.

**Task 1**
- Performance Monitoring – Individual Beneficiaries – set the default view as Active Individuals (including personal information)

**Task 2**
- Performance Monitoring – LCGs – change the default view to another view

**Task 3**
- Performance Monitoring – Individual Beneficiaries – sort data by Age Band Youngest to Oldest
System Views

Task 4
• Sort by HP Deprivation Range for Small Areas

Task 5
• Sort by Age Band Youngest to Oldest and by Gender
Filtering Data

Task 6
• Filter by pre-defined category such as Gender

Task 7
• Reset Filter

Task 8
• Filter by Age Band (pre-defined multiple options)
  Filter by 15-35 year olds (2 bands)
  Save the views as Test views

Task 9
• Dates – filter/sort by date of last intervention
  • Oldest to newest
  • Filter by Month
Filtering Data

Task 10
• Filter by Number of interventions

Task 11
• LDC filter by staff member and save view

Task 12
• LDC filter by LDC reference and
  LDC/LCDC Filter by emerging need - save view

Task 13
• LCDC filter by Lot and save view
• LCDC filter Electoral District(s) save view
Filtering

Task 14
• Find out how many Individuals (with 2 or more interventions) are in the ‘over 55’ age bracket

Task 15
• Find out how many Individuals with highest educational attainment level = Junior Cert or lower

Task 16
• Exporting data list to Excel
Task 17

- On the default LCG View open advanced find and add the following criteria:
  - Date of last intervention/contact – Older than 3 Months
  - Remove Columns for 2019 interventions
  - LDC Reference Contains
  - View Results
  - Change Column order
  - Save the View
  - Set as the default view
Advanced Find

Task 18
• Share a test view with one other staff member – with the team

Task 19
• Assign a View – to one other staff member

Task 20
• Delete or deactivate a test view.
Task 21
• From the chart breakdown on Age, drill down into the data for 15-24 year olds and produce two additional charts on Gender and then by nationality

Task 22
• Refresh the system view for individuals and filter by gender and then by age refreshing the system charts each time.

Task 23
• Under LCGs Create a Bar Chart that shows the LCGs by Stage of Development on CD Matrix—save the chart
System Charts

Task 24
• Under LCG Supports & Outputs create a chart using LCG ID and Action. Save the chart

Task 25
• Share or assign the chart with another team members

Task 26
• Create a chart under LCG entity to present the number of LCGs by staff member – Save the new chart

Task 27
• Share or assign the chart with another team members
**Task 28** - Run the following Reports:

<table>
<thead>
<tr>
<th>Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCDC Payment Report</td>
</tr>
<tr>
<td>Lot Cost Charged Report</td>
</tr>
<tr>
<td>Action Progress Report</td>
</tr>
<tr>
<td>Goal Outcome Report 1 &amp; 2</td>
</tr>
<tr>
<td>Target Group Report</td>
</tr>
<tr>
<td>Individual Report</td>
</tr>
<tr>
<td>Lot Summary Report</td>
</tr>
</tbody>
</table>
Dashboards

Task 29
• Create a dashboard based on your group discussion

Task 30
• Save and share the dashboard with another team member
https://www.surveymonkey.com/r/XLWPRZP

Thank you for participating in the IRIS training today. For further queries or support please email:

IRIS@pobal.ie or SICAP @pobal.ie