

IRIS Training 2018 -2022

Phase 2

April – May 2018



Accessing IRIS

<https://together.pobal.ie/SICAP2018/main.aspx>

Authentication required

https://together.pobal.ie

Username

Password

Log in

Cancel

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**
- 13:40 : 13:50 SharePoint – Document Access**
- 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**

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

Advanced Find

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.

System Charts

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

Reports

Task 28 - Run the following Reports:

LCDC Payment Report

Lot Cost Charged Report

Action Progress Report

Goal Outcome Report 1 & 2

Target Group Report

Individual Report

Lot Summary Report

Dashboards

Task 29

- Create a dashboard based on your group discussion

Task 30

- Save and share the dashboard with another team member

Evaluation

<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