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How to use Advanced Find function

Advanced find allows users to create ad hoc queries and save, export and share the results. They are also known as Views.

• Can be used to search any record type (entity)
• Users can create complex filters and queries based on any fields within or related to the record being searched
• Can be saved as personal views (My Views) and shared with others users or teams.
• Results can be exported to Excel so that you can analyze, summarize, or aggregate data, or create PivotTables
• Advanced Finds can feed charts
• Bulk operations can be carried out on Advanced Find results

The Advanced Find function can be accessed from the navigation bar along the top of the IRIS screen.

A screen will open and you can specify what to search for.

Refer to User Guide 1.1 to change your system options if you cannot access the Advanced Find features.

In the Look for list, select a record table (e.g. Individuals, LCGs, LDC Payments). In the Use Saved View field you can select an existing view and edit as required, or you can make a new one.

Click Select to define search criteria: field (e.g. status), the query relational operator (Part of an expression (for example "equals" or "contains") that defines how a specified attribute should be compared with a value.) So for example below we can see the query is looking for individual records that are active.

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You can continue to filter by using ‘select’ and adding your search criteria. You can select fields from the current record table, or from related tables.

The example below shows what can be set up to search for, through advanced find.

The view below is set up to search for individuals:

- Who are active
- Where more than 3 months have passed since the date of last intervention AND date of last Phone/Email contact
- Have a particular staff member associated with them (as per their individual record)
- Are on the 2018 KPI 2 Caseload

By grouping using AND the records presented in the results will be individuals where both the date of last intervention AND date of last Phone/Email contact were more than 3 months ago.

If the OR grouping was used, the records would present individual records where either field had a date more than 3 months ago.

To group search criteria together select the criteria and use the Group AND or Group OR buttons.
Once all search criteria has been added you must specify the columns to include in the search results.

Click Edit Columns, and then click Add Columns.

Select the columns you want to add, and then click OK.
Use the configure sorting button to specify which order your results should be displayed and press OK.

<table>
<thead>
<tr>
<th>Individual ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>LDC</th>
</tr>
</thead>
</table>

View results are displayed here.

**Configure Sort Order**
Select the columns to sort on by default.

- **Sort By**: Date of Last Intervention
  - Ascending Order
  - Descending Order
- **Then By**: Select
  - Ascending Order
  - Descending Order

Where columns have longer field names you can use the ‘change properties’ option to change the width of the column field.

**Edit Columns**
Edit columns for the saved view. These columns represent the data that will be displayed in the view.

View results are displayed here.

**Note**: When there are too many columns to fit on a page, the view will be shortened and scrollbars will be added.
Click ‘Save As’ and name the view, you can also add a description if necessary, click Save.

Save as new View

The view is stored in the list of saved views.

- **Name**: Individuals who need to be contacted
- **Description**: Individuals on KF2 caseload that have not had an intervention or contact in more than 2 months

Click Results and the records with the specified criteria will be displayed.

To make more changes to the view you can click on the Advanced Find tab to return to the view criteria.
This list of records can be exported to Excel if required. In the interests of data protection you should remove personal details (name, PPS and contact information) before exporting unless it is absolutely necessary to the task.

Click on the Export button to Open and Save the records in Excel.

You can share or assign this view with other people by using the Saved Views button.

To share the view – select the view and click the Share button.
Click on Add User/Team.

Specify the name of the person/team you wish to share the view with and click Add.
Select the tick box under the share column and then click Share.

If you have created the view for someone else and do not need to access it (e.g. another staff member) use the Assign Saved Views option.

Click on the Assign to field to assign to another user/team and use the search button to select who you are assigning the view to.