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Access your Annual Plan

Once you are logged into the IRIS system you will be directed to your default home page for the site (see Iris User Guides How to Set the Default Page).

Select the Annual Plan option in the navigation pane along the top of your screen. Then, select your current annual plan from the list by double clicking on the relevant record (check Lot name under the heading Year/Lot if you have more than one Annual Plan).

Note: Do not click on the text of the record, instead click on a part of the line that is blank.
AP – General

Your current Annual Plan will open on the screen. All fields marked with * (red asterisk) are mandatory and will have been completed by Pobal where appropriate (e.g. Annual Budget).

**ANNUAL PLAN : INFORMATION**

2018 / Cork West Cork Islands (18-7) 

**General**

- **Annual Budget**
  - @£0.00
- **Overall Costs**
  - @£0.00

Subcontractor costs do not exceed 30% of annual plan budget? *
- [ ]

Total Grant costs do not exceed 7.5% of total action costs *
- [ ]

**Total Costs Summary**

- **Total Admin Costs**
  - @£0.00
- **Total Action Costs**
  - @£0.00

Admin Costs as % of Overall Costs
- @0.00

AP – Total Costs Summary and Action Costs Summary

The cost fields in both of these sections are auto-populated by the System based on the cost details input for each action and administration cost type and direct salaries.

Note: Clicking on any of the links in the annual plan information menu (shown right) will take you to the corresponding section in the Annual Plan (shown below)

**Total Costs Summary**

- **Total Admin Costs**
  - @£0.00
- **Total Action Costs**
  - @£0.00

**Action Cost Summary**

**Goal 1**

- GS Non-Salary
  - @£0.00
- GS Direct Salary
  - @£0.00
- GS Total Costs
  - @£0.00
- GS % of Total Actions
  - @0.00

**Goal 2**

- GS Non-Salary
  - @£0.00
- GS Direct Salary
  - @£0.00
- GS Total Costs
  - @£0.00
- GS % of Total Actions
  - @0.00
AP – KPI’s

From within the Annual Plan record, click on the link to KPI Target and Actuals section in the Information section to the right of the Annual Plan name.

The annual targets for KPI 1 and KPI 2 and % Individuals living in disadvantaged area will already be pre-populated by Pobal on the system.

AP – Documents

Link to SharePoint Library

Actions for this Annual Plan

In the navigation pane under the heading Annual Planning Items select the Actions for this Annual Plan option.
Click on the Add New Action icon in the left hand corner of the ribbon displayed underneath the Annual Plan name.

The following window will open for completion. You can use the tab key to move between fields on the system.

**AP – Action Details**

Enter the Action Name as per set out in the Tender document (please use short names for each action i.e. 50-100 characters). Select the Goal for the Action.
Select the Calendar icon to choose the Start Date and the End Date for the action.

Enter the relevant location in the Location field – please be as specific as possible i.e. name the housing estate or village if relevant.

**AP – Target Groups**

- **Primary Target Group**
- **Secondary Target Group**

**AP – Description**

Use the Description section to provide further detail on the work that will be carried out and in particular the role of SICAP in relation to this action. All details entered must be consistent with the Tender document. Where possible take details directly from the Tender document.

**AP – Expected Outcomes**

Please fill in the details of the Expected Outcomes in the space provided. This section can include details of qualitative outcomes and the methodology for monitoring providing evidence or expected outputs/results.
**AP – KPI Targets & Actuals**

Input target figure for KPI 1 if action supports work with LCGs.

Input target figure for KPI 2 if action supports work with Individuals

The actuals for both KPIs will be calculated automatically as beneficiaries are recorded against the action

**AP – Cost Detail**

Next, move on to the AP- Cost Detail section of the form and enter the various cost details in the fields as they appear on the screen. Input value for G1 Non-Salary Costs and/or G2 Non-Salary Costs

<table>
<thead>
<tr>
<th></th>
<th>G1 Non-Salary Costs</th>
<th>G2 Non-Salary Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Action Non-Salary Costs</td>
<td>€0.00</td>
<td>--</td>
</tr>
<tr>
<td>Cost Charged to Date</td>
<td>€0.00</td>
<td></td>
</tr>
<tr>
<td>VAT Charged to Date</td>
<td>€0.00</td>
<td></td>
</tr>
<tr>
<td>Cost Charged as % of Action €</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

The system will automatically calculate the Total Action Non-Salary Costs. (Remember, that all costs entered must be a positive amount as the system will not verify a negative or minus figure). The Cost Charged and VAT Charged fields will be populated automatically as part of the Fin & Mon report later in the year.

Costs can be spread across goals but the majority of the total costs must be entered in the field(s) relevant to the Goal of the action – i.e. for a Goal 1 action, a cost must be entered in Goal 1 Non-Salary Costs and/or Goal 1 Direct Salary Costs.

Before moving on you must click on the **Save icon** in the top left hand corner of the ribbon.

Clicking on the Save icon to save your data will activate the grids and allow you to input:

- Action Outcomes
- Collaborative Partners
- RAPID Areas
- Electoral Districts
- LECP Objectives
AP – Action Outcomes

Click on the link to AP – Action Outcomes section from the navigation menu.

Click on the button on the right of the ribbon to add a new Action Outcomes.

The following window will open for completion.

The Action field will auto populate. Use the look up function to select the relevant SICAP outcome from the drop down list provided. Click Save & Close icon when complete. Repeat to steps to add another Action Outcome.
AP – Collaborative Partners

Click on the link to AP – Collaborative Partners section from the navigation menu.

Click on the + button on the right of the ribbon to add a new Action Collaborative Partner.

The following window will open for completion.

The Action field will auto populate. Use the look up function to select the relevant Partner organisation from the drop down list provided. Use the look up function to select the Role of the Partner organisation in the delivery of the action. Click Save & Close icon when complete. Repeat steps to add another partner.

There are a limited number of named organisations. If you do not find the specific organisation use one of the generic options (e.g. local community group, independent charitable organisation). You can specify the name of the organisation in the comment field.
AP – Rapid Areas

Click on the link to AP – RAPID Areas section from the navigation menu.

Click on the **button on the right of the ribbon to add a new Action RAPID Area

The Action and Owner fields will auto populate. Use the look up function to select the relevant RAPID area from the drop down list provided. Click OK. Click the Save & New icons to input another record in the RAPID area section and click the Save & Close icon when complete. Repeat steps to add another RAPID area.

AP – Action Staff Member

Click on the link to AP – Action Staff Members section from the navigation menu.

Click on the **button on the right of the ribbon to add a new Action Staff Member

The following window will open for completion.

POBAL/SICAP/User Guide 3.1/29JAN2018
Use the look up function to select the Action and the staff member in your organisation who is involved in the delivery of this action. To save this record, click the Save & Close icon when complete. Repeat steps to add another staff member.

**AP – LECP Objectives**

The LECP Objectives have been input by the LCDC.

Click on the link to AP – LECP Objectives section from the navigation menu.

Click on the + button on the right of the ribbon to add a New Action LECP Objective

The following window will open for completion.
In the LECP Objective field, use the look up function to select the relevant objective from the list provided. Click OK. Click Save & Close icon when complete. Repeat steps to add another objective.

**Action Progress Report**

This section is not used as part of the Annual Plan submission process. It can be updated during the year to provide a narrative update on the action e.g. progress, achievements, challenges etc. It is included as part of the Annual Progress report process.

**Admin & Direct Salary Cost Items**

Click on the Admin & Direct Salary Cost Items for this Annual Plan option under the heading AP Items in the navigation pane.
The following window will open

Costs should be input for the 4 different Admin cost types and the Goal direct salaries.

To input a cost, double click on an area of white space beside the record as indicated by the red arrow above.
The only field that you are required to complete in this section is the Annual Plan Cost. Enter the correct amount and click the

How to Print Annual Plan Report


The report is generated and the following screen will appear. Click on the Print icon or the Export icon to export the file to your PC in PDF or Excel.
Checklist before Annual Plan is Submitted to LCDC for Approval

Once all of the sections outlined previously have been completed, you must then Save the annual plan on the system.

The final stage in the process is to ensure that all of the following is in order, before using the lookup icon next to the Stage field to open up the Look Up Record screen and progressing the status of the Stage field from ‘Draft’ to ‘Submitted’:

- All calculated totals must be in line with SICAP financial requirements:
- Overall Costs amount does not exceed Annual Budget
- Subcontractor costs do not exceed 30% of annual plan budget is ticked
- Total Grant costs do not exceed 7.5% of total action costs is ticked
- Total costs for each Goal are between 40% and 60% of the Total Action Cost Budget or are as agreed with the LCDC per the Tender/Annual Plan
- Total Admin costs as a % of Overall Costs does not exceed 25% of your annual budget allocation
- KPI targets have been set for all Actions (as required) and that they roll up to ensure achievement of Lot KPI targets
- Staff costs sheet is complete and uploaded to the Annual Plan folder* in the Documents section of the Annual Plan (see user Guide on How to Upload Documents)
- All SICAP staff members have been set up in IRIS as per the Staffing Resource Schedule (see User Guide on How to Add New Staff Members) and CVs for each staff member are also uploaded to the Staff CV Folder**
- IRIS User Policy Schedule E of your funding agreement with the LCDC has been completed and signed by the relevant assigned staff members that will be using IRIS and uploaded to Staffing Folder

Once the status moves forward to the Submitted phase, the system locks the annual plan and prevents any further changes being made. You will now have an option to print a copy of the annual plan from the system should you require it. The Annual Plan will now be available for review by LCDC and Pobal.

* The Annual Plan folder is restricted and can only be accessed by users specified by the LDC, the funding LCDC and Pobal staff.

** The Staff CV folder is restricted and can only be accessed by users specified by the LDC, the funding LCDC and Pobal system administrator.