How to Review an Annual Plan on IRIS

The Annual Plan can be reviewed on-screen or generated as a report and exported to print.

Click on LDC Management then Annual Plans, and select the Annual Plan that you need to review (the Stage of the Plan should be 'Submitted') and double click (on a clear part of the line) to open the record.

Note: If the Annual Plan is still at ‘Draft’ stage it means that the Local Development Company is still inputting/updating information and it is not ready for review by the LCDC. You can still view the plan but you must wait until it is at ‘Submitted’ stage before carrying out your formal review.

The Annual Plan record will open and you will be on the General screen with summary information. To print the report for reviewing off-line refer to the next section ‘How to Print Annual Plan Report’

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Budget *</td>
</tr>
<tr>
<td>Overall Costs</td>
</tr>
<tr>
<td>Subcontractor cost not &gt; than 30% of annual *</td>
</tr>
<tr>
<td>Total Grant costs do not exceed 7.5% of total *</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Total Costs Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Admin Costs</td>
</tr>
<tr>
<td>Total Action Costs</td>
</tr>
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</table>

Admin Costs as % of Overall Costs
Note: The LCDC can update the three Lot targets if they are incorrect. We recommend that you add a Note to explain any changes that are made. Click on the link to Notes and then click on 'Enter a note' to type your text. The Local Development Company will be able to see this Note.

1. The necessary documents have been uploaded. Click on the Documents link to view that the documentation that has been uploaded. You may need to sign into SharePoint to access the documents (if so please refer to the guide How to Upload a Document). Confidential documents relating to staff details will be stored in the Staffing folder. Double click to open the documents.

To view the Action details on screen click on the link to Actions for this Annual Plan.
The list of Actions will be displayed. Double click on a record to open and view the details.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Goal...</th>
<th>Action Name</th>
<th>Action Category</th>
<th>Start Date</th>
<th>End Date</th>
<th>Annual Plan</th>
</tr>
</thead>
</table>

To view the Admin & Direct Salary Costs details on screen click on the link to **Admin & Direct Salary Cost Items**

The list of Goal Salary and Administration costs will be displayed. Double click on a record to open and view the details.
Open the Annual Plan you wish to print. Click on **LDC Management** then **Annual Plans**.

A list of Annual Plans for your Lot(s) will be displayed. Select the Annual Plan that you need to review (the Stage of the Plan should be ‘Submitted’) and double click (on a clear part of the line) to open the record.
The Annual Plan record will open. Click on Run Report icon and select the report ‘Annual Plan Report’.

The report screen will open. Set the ‘Show Staff’ option to No (if the report is being copied to a third party e.g. LCDC member)

Click on the Export icon to save and print the document onto your computer, select ‘Acrobat (PDF) file’
When the popup appears, click on **Open** (you may need to maximise your screen to access this)

The report will open in Acrobat and you can save and print directly from here – (contact your IT support/provider) if you do not have acrobat on your computer.

**Annual Plan Approval Stages**

There are 6 stages in the Annual Plan Approval Process:

1. **Draft** – this annual plan is at this stage when it is being input by the Local Development Company.

2. **Submitted** – the Local Development Company moves the Plan to Submitted stage when they have completed their input and it is ready for review by the LCDC. The Plan is locked for the LDC user cannot make any further changes.

3. **LCDC Reviewed** – The LCDC moves the Plan to this stage when they have completed their initial review and costs and KPI targets are correct. For 2018 the LCDC check is to make sure that the information on IRIS matches the tender document. If there are any issues with a particular action or admin cost heading then the LCDC will move the Stage of the particular item(s) back to 1.Draft to allow the Local Development Company make the necessary changes. See next section on how to move the Stage for an Action or Admin & Direct Salary Cost Items. If there is an issue with any of the KPI Targets, the LCDC can amend them accordingly. A note should be input to explain any changes.

   **Note:** The Stage of the Annual Plan should not be set back to 1.Draft unless it needs a full rewrite – this would be a very exceptional occurrence. The LDC user must move the Plan back to Submitted when they have made the required changes.

4. **Pobal Reviewed** – Pobal move the Plan to this stage when they have completed a high level review.

5. **Approved in Principle** – LCDC moves the plan to this stage. Final approval is subject to the outcome of the end of year review process

6. **Approved** – the LCDC moves the Plan to this stage when formal approval from the LCDC has been given (this is confirmed by setting the field to Yes).
**Move Annual Plan to the Next Stage**

Once you have completed the review of the Annual Plan move it to the next Stage (see above for details of the Annual Plan Approval stages). Open the Annual Plan record, clear the contents of the Stage field and input the number of the next Stage (e.g. 3.), hit enter and click on the Stage to select.

Alternatively you can use the Look up icon to search for the Stage. Click on the **lookup** icon for the Stage field.

Click **Look Up More Records** as shown:

Click the X in the search box.
All stages will be displayed, select the next stage in the process and click Add.
How to Move an Action or Admin Cost Item back Draft

To move the stage of an Action, click on the link to Actions for this Annual Plan, and then double click on the action record you want to set to Draft.

The action record will open. Click on the lookup icon for the Stage field.

Click Look Up More Records as shown
To view all of the Stage options available, click the X in the search box.

Select the **1. Draft stage** and click on **Add**.

Then select **Save and Close** on the Action record screen.
To move the stage of an **Admin & Direct Salary Cost Item**, click on the link to **Admin & Direct Salary Costs Items for this Annual Plan**, and then double click on the Admin or Direct Salary Cost item you want to set to Draft.

The **Admin Cost Item** will open. Click on the lookup icon for the Stage field. Select the 1. Draft stage and click on OK. Select Save and Close.

Click on the **lookup** icon for the Stage field.

Click Look Up More Records as shown

To view all of the Stage options available, click the X in the search box.
Select the **1. Draft stage** and click on **Add**.

Then select **Save and Close** on the Admin & Direct Salary Cost record screen.

The Local Development Company must set these records back to Submitted stage once they have made the required changes. The Annual Plan then follows the stage process (LDC Reviewed, Pobal Review, Approved) and the stages of all Actions and Admin Cost Items will be updated accordingly.