

IRis 4.0—Upgrade Features

- New Interface – Windows Vista compatible
- New Agency/Sites/Services structure for data organization and searches
- Volunteer Management module
 - Keep a record of each volunteer, their qualifications, interests and certifications
 - Track referrals of volunteers to volunteer opportunities at Agencies and Sites
 - Create reports on volunteer management activities
- SQL database backend:
 - Increases scalability: allows for unlimited number of records
 - Increases search speed
 - Reduces database maintenance: eliminates need for reindexing
 - Works with Microsoft SQL Server (full version); or Microsoft's MSDE (included within installation)
- Enhanced Taxonomy Management and Taxonomy Search areas; compliant with AIRS requirements for use of the AIRS/LA 211 Taxonomy in a software system
- Screen Designer capability in all modules:
 - Contact/Client data entry and history screens
 - Agency screens
 - Sites screens
 - Volunteer screens
- Additional user-defined fields in all modules
- Extended field lengths
- Time-saving data entry shortcuts for creating and updating service provider records, and updating taxonomy subscription
- Data-checking features and tools for checking data integrity
- Spell-check throughout
- Unlimited contact phone numbers in Resource Maintenance area
- Capability to easily attach referrals to needs
- Ability to email a Contact/Caller record
- Mass email functionality for sending letters to Service Providers
- Rewritten wizard-style IRis Reporting/Query module
- Redesigned "standard" reports, plus a few new ones
- Ability to export reports and query results directly to Excel (.xls)
- Redesigned area for managing Geographic areas/information: New ability to create "custom" geo areas on the fly for searches
- Ability to load/update geographic data as published by the United States Postal Service
- Supports AIRS standards for XML Data Migration (export)
- Compatible with IRis For The Web and IRis "Holding Pen" Update Utility for automating the updates of service provider records
- Fully compliant with AIRS standards

IRis 4.0—Frequently Asked Questions

Q: What are the minimum system requirements for IRis 4.0?

A: See documentation.

Q: How will the upgrade procedure work?

A: The upgrade will be automated in the install of the new upgrade/application (via CD). Once the 4.0 application is installed, it will “auto-prompt” to convert the current IRis files. The user will “point” to the directory where the current IRis files are located and the 4.0 application will begin the conversion.

Q: How long will the upgrade procedure take?

A: This will depend on the size of your current IRis installation. Preliminary tests show that with a small data set, it can take an average of 2-10 minutes. With a very large data set, it can take two hours or more.

Q: Can I upgrade from 2.3 to 4.0?

A: No. The technology from 2.3 to 4.0 is too different. You’ll need to install 3.0 first, then upgrade to 4.0. This will ensure the cleanest installation possible. If you do not want to use any of your data from 2.3, you can just install 4.0 and start fresh.

Q: Will I need to re-organize my database in order to begin using IRis 4.0?

A: Once the 3.0 files are converted to 4.0, there will most likely be some handwork involved. The time spent on cleaning up the converted data will vary according to the amount of data involved and the way it is currently organized. The goal is to allow the IRis customer to convert and begin using the software with clean up occurring on an on-going basis.

Q: Do I need to have any other software installed (besides the operating system) in order for IRis 4.0 to work?

A: No. If you have Microsoft SQL Server (full version), IRis 4.0 will use it. Otherwise, IRis 4.0 will install Microsoft’s MSDE to use with the SQL backend. Note: For more than 5 concurrent users, we recommend using the SQL Server full version as opposed to MSDE.

Some of the features in IRis 4.0 are designed to work with products included in Microsoft Office (such as Word and Excel). If you want to use these features, you’ll need these products.

Q: Can I use my data from a different product?

A: If you will not be using the other product anymore, the data will need to be converted to the IRis format. Any qualified database engineer can perform the conversion, or we can provide a quote for the one-time conversion.

If you will be receiving (resources/service provider) data from another product on a regular basis, please contact us regarding your options.

Q: Is 4.0 backwards compatible for data-sharing with 3.0 users?

A: No. The data structure is too different. All data partners must upgrade at the same time.