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SunCoast Custom Programming & Web Design/IRis Software Products 2007 Online Training Schedule

All times listed are Eastern.

IRis 3.0: Contact/Caller Area

Every 2nd Wednesday of the Month, 3PM – 4:30PM

1/10, 2/14, 3/14, 4/11, 5/9, 6/13, 7/11, 8/8, 9/12, 10/10, 11/14, 12/12

Designed to benefit those who are new to IRis 3.0 or newly hired staff members, this class will take an in-depth look at the contact, or caller, area of IRis 3.0. We cover set up options, types of data that can be displayed on each tab/page, how the screen customizations save I&R staff time, and why data entry is important. Practice exercises will be performed during the class. 1.5 hours.

Agenda

Welcome/Introductions

Data Entry

Screen Customizations Setups

Searches

Best Practices

Q&A

Lists

IRis 3.0: Client Tracking and Case Management

Every 1st Wednesday of the Month (except July), 3PM – 4:30PM

1/3, 2/7, 3/7, 4/4, 5/2, 6/6, 7/5, 8/1, 9/5, 10/3, 11/7, 12/5

Organizations involved in, or contemplating, the tracking of repeat services provided for clients will most benefit from this class. Join us as we take you on a journey through the client tracking/case management module of IRis 3.0. We'll look at set up capabilities, screen customizations, and how data is entered. Exercises on customization, data entry, searching, and producing the standard client/case reports will be performed during the class. 1.5 hours.

Agenda

Welcome/Introductions

Data Entry

Screen Customizations/Setups

Standard Client and Case Reports

Best Practices

Q & A

IRis 3.0: Using the Screen Designer

Every 3rd Thursday of the Month (except January), 3:30PM – 5:00PM

1/11, 2/22, 3/22, 4/19, 5/17, 6/21, 7/19, 8/16, 9/20, 10/18, 11/22, 12/20

This class will most benefit IRis administrators – whoever is responsible for setting up the IRis screens at their organization. We'll discuss every detail of the screen designer function included in IRis 3.0 while redesigning an actual contact/caller screen. Time permitting, we'll include hands-on exercises and a Q & A session.
1.5 hours.

Agenda

Welcome/Introductions

About the Screen Designer

Accessing the Screen Designer

All about user-defined fields:

- Field types
- Creating, renaming, deleting, formatting appearance of

All about screen layouts:

- Placing and moving fields and labels
- Creating new screen pages
- Resetting the field tabs
- Saving modifications

Screen customizations and reports

Screen customizations and data sharing

Q & A

IRis 3.0: Doing More with Standard (Built-In) Reports

Every 3rd Wednesday of the Month, 3PM – 4:30PM

1/17, 2/21, 3/21, 4/18, 5/16, 6/20, 7/18, 8/15, 9/19, 10/17, 11/21, 12/19

Designed to benefit all IRis users; especially those who have a reporting responsibility. We'll cover the IRis 3.0 reporting features that are built-in to cover your basic reporting needs. A more detailed look at each standard report and examples of each are given. We'll explain the when and why these reports would be used, how to modify and save your modifications to a reports layout, how to use various layouts for the same data to meet the requirements set by different funders, and finally, discuss the data output options for reports included in IRis 3.0.
1.5 hours.

Agenda

Welcome/Introductions

Agency Reports/Labels

Program Reports/Labels

Contact/Client reports

Best practices

Q & A

IRis 3.0: Custom Reports/IRis Query

Every 4th Wednesday of the Month (except December), 3PM – 4:30PM

1/24, 2/28, 3/28, 4/25, 5/23, 6/27, 7/25, 8/22, 9/26, 10/24, 11/28, 12/20

Designed to benefit all IRis users with a reporting responsibility, this class covers the IRis Query utility in greater detail. Prerequisite recommendation is “Doing More with IRis 3.0 Standard Reports.” IRis Query is an ad-hoc reporting tool for extracting meaningful statistical information from your database. It also includes its own report writer so you have complete control over how you want to present the data on the report. IRis Query eliminates the need for manipulating your IRis data with an outside program. We'll cover how it provides flexibility, speed, and simplifies your reporting needs. See how to run, modify, create, and save queries in this class. 1.5 hours.

Agenda

Welcome/Introductions

IRis Query: What is it?

How to access IRis Query

Build a custom report using IRis Query

Modify the layout

The reports list

Q & A

IRis Publications: Creating printed directories of your resources information from IRis

Every 2nd Thursday of the Month, 3PM – 4:30PM

1/11, 2/8, 3/8, 4/12, 5/10, 6/14, 7/12, 8/9, 9/13, 10/11, 11/8, 12/13

Open to customers using either version of IRis, 2.3 or 3.0, this class will explain everything you need to know about IRis Publications so you can use it to effectively produce professional printed directories of your IRis resources information. We'll take you through the process step-by-step, give time-saving tips and tricks to avoid common mistakes, and answer your questions. 1.5 hours.

Agenda

Welcome/Introductions

Purpose of Publications

Requirements

Installation

Accessing the application

Creating the directory (indices, data selection, layouts)

Modifying the layout

Q & A

Raising Funds Using IRis Directory on Disk Scheduled on a case-by-case basis

This is a one-hour class looking at new and additional ways to raise funds for your organization using IRis Directory on Disk. The class explains what Directory on Disk is, who needs it, and how you can "sell" it -- and your organization -- to your community. We'll show you how to add thousands of dollars to your budget! This class has no prerequisites and is designed to benefit anyone responsible for fundraising activities. 1 hour.

Agenda

Welcome/Introductions
IRis DOD: What is it?
Who needs it?
Cost vs. R.O.I.
How to market it effectively
Q & A

IRis For The Web (IFTW) & IRis 3.0 Holding Pen New User Orientation Class Scheduled on a case-by-case basis

This class is open to customers who have purchased the system or are current annual subscribers. There is no additional charge for this class as it is included in the subscription fee (or purchase cost).

The class will cover the front end user interface, as well as everything you need to know in order to take over maintenance of your web site. We'll take you through the IFTW administration functions, including IFTW data update options, reporting, customization options, event calendar administration, and using the Holding Pen feature (IRis 3.0 customers only).

To register for this class, call 800-335-8817, or send an email request to tech@suncoastprograms.com.

IFTW Agenda

Welcome/Introductions
Using IFTW:

- Searches
- Service Provider Update forms
- Map Tool
- Language Translation

Using the administration area:

- Data updates: Uploading data
- Reporting options
- Web site customization options
- Using the Event/Calendar function

Q & A

IRis 3.0: IFTW Holding Pen Feature

Using the Holding Pen:

- Installation
- Configuration
- Updating Records

Q & A

IRis 3.0: XML Export Utility
New User Orientation Class
Scheduled on a case-by-case basis

This class is open to customers who are current annual subscribers. There is no additional charge for this class as it is included in the subscription.

The class will cover the front end user interface, as well as everything you need to know in order to export your resources to the XML format. We'll take you through the options for:

- creating exports using keywords as services vs. taxonomy terms as services
- using the strict vs. loose option
- mapping custom fields to the AIRS XSD
- understanding the export log report
- saving the file
- creating, saving and loading file preferences

To register for this class, call 800-335-8817, or send an email request to tech@suncoastprograms.com.

IRis 4.0: FREE Demo Conference Meeting
Every Thursday beginning 1/25/07 (until further notice), 12PM – 1PM

One hour mini-demos will take you through specific sections of IRis 4.0. The area to be shown each week will be announced via the IRis-Users Group listserv.

Demo meetings are open to both existing and prospective customers. To register, please send an email request to: sales@suncoastprograms.com.

IRis For The Web: FREE Demo Conference Meeting
Scheduled on a case-by-case basis

One hour demo will take you through IRis For The Web:

- Features and capabilities
- Customization options
- Administration area, including reporting
- Fees

Demo meetings are open to both existing and prospective customers. To register, please send an email request to: sales@suncoastprograms.com.