IRIS | Practice Engine

V9 End User Guide

Dashboards, TaskPads and the Menu

DOCUMENTATION

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CONTENTS

V9 END USER GUIDE TO DASHBOARDS, TASKPADS AND MENUS

This document is aimed at the end user to provide information on the configuration of the dashboards and menu's within V9. It will also provide information relating to the available dashlets (permission based), their intended audience and any editable functions relating to individual dashlets.

IMPORTANT: Dashlet, Menu, Batch, Most Recently Used and Grid settings are retained in temporary internet data in each browser and on each device. If Cookie and Website data is cleared from temporary internet files/ browsing history, user selections will be lost.

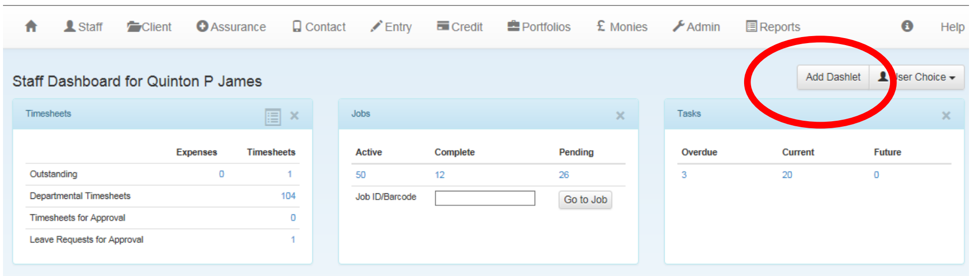
DASHBOARDS

The dashboards within V9 are highly configurable.

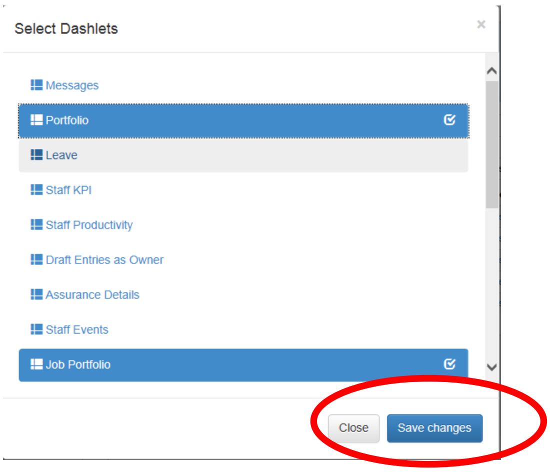
There are three dashboards available in the system; Staff, Client and Contact. Each can be configured in the same way and show the Dashlets that are available and in use for the user. The initial view of the dashboard will show any dashlets that the user has access to. The dashboards will adapt the size of the dashlets based on the device that the user is using and the available screen size.

CONFIGURING THE DASHBOARD

Dashlets can be added to the dashboard using the **Add Dashlet** link. This will display a list of dashlets that the user has permissions to but are not currently being used.

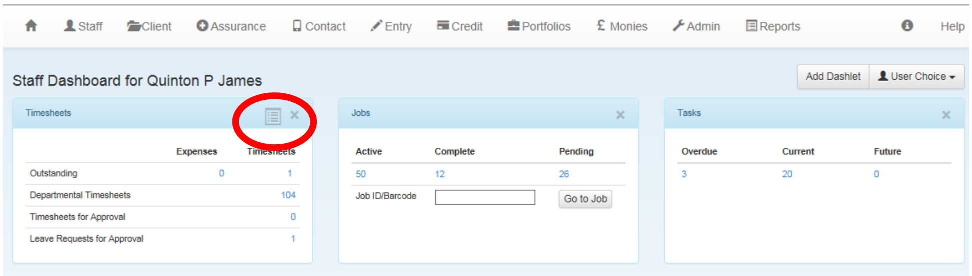


Select the Dashlets to be added to the dashboard and click onto **Save Changes.** Click **Close** to exit the dialog without making any changes. The dashlet will be applied to the dashboard in the next available location.



Dashlets can be dragged and dropped into a preferred position.

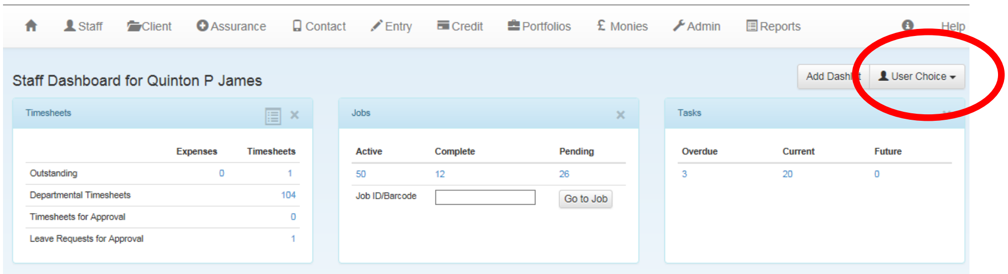
Dashlets can be removed from the dashboard using the cross in the top right corner of the dashlet. This will remove the dashlet from the dashboard and return it to the list of available Dashlets.



Some dashlets have an additional  icon to indicate that they have editable features. Clicking onto this icon will display a list of values that can be displayed within the dashlet.

There is also an option that allows the user to select to either keep the User Choice of dashboard layout, or a System Default layout. This can be toggled by selecting the required choice from the link next to Add Dashlet.

Note: If the choice is set back to System Default, any changes made previously by the user will be lost.



It is also possible to restore to the System Default.

STAFF DASHBOARD

The Staff Dashboard acts as a homepage for most users.

There are three levels of information a dashboard can contain and these are defined by staffing level; staff, manager and partner, with each level showing progressively more financial information regarding clients.

The dashlets that are available on the Staff Dashboard (permissions allowing) are listed below:

TIMESHEETS

This shows the number of outstanding timesheets and expenses for the logged in staff member. Clicking on the **total** will display a list of ‘**Active**’ timesheets or expenses. Timesheets and expenses with a status other than ‘Active’ can be viewed by selecting the appropriate tab.

It will also display the number of outstanding timesheets for the staff members department and the number of timesheets and expenses that are available for approval. Both of these options require the staff member to have the relevant permissions to the linked pages of Dept Timesheets and Timesheet Approval.

Any leave requests that the staff member is responsible for approving can also be displayed on this dashlet. Clicking onto the number of leave requests will navigate through to the Managers Leave Request approval page.

This dashlet is configurable with the options of: Show Expenses, Show Dept Timesheets, Outstanding Approvals, Show Timesheets for Job Approval and Show Leave Requests.

STAFF JOBS

This dashlet shows the total of jobs, grouped by whether the job is ‘Active’, ‘Complete’ or ‘Pending’. A Job Search field allows for jobs to be searched for by barcode or job index.

Clicking onto a total will navigate through to the Staff Job Control page where the jobs will be listed.

TASKS

Total of tasks, grouped by whether the task is ‘Overdue’, ‘Current’ or ‘Future’ dated. Clicking each total gives a breakdown of the tasks within the selection. Tasks within the other ranges can be viewed by selecting the appropriate tab from the Staff Tasks page.

The Action menu on the Tasks page gives access to the Client Dashboard, Job Details and Task Details.

JOB CONTROLS

The Job Controls dashlet provides information regarding the number of Jobs that the staff member is either the partner, manager, in charge on or where the job has been assigned to them.

The jobs are shown based on the service selected and the workflow statuses that have been set up within IRIS Practice Engine. Clicking onto the number on any of the lines will navigate through to the staff member’s job control page, from which the details of any job the staff member is connected to can be viewed.

Clicking onto the number displayed next to **On My Desk** will show all jobs where the staff member is the current staff.

There is also an indicator to show any Unassigned Jobs. If any jobs have been assigned to a rack that works on a First available status, the number of unassigned jobs will be displayed. Clicking onto the figure will open Staff Job Pickup pager where the staff member can take assignment of a job.

If the staff member has been assigned to a job, but not yet accepted the staff member will receive a dialog to action whether they will be accepting the assigned job(s) or rejecting them.

LEAVE

Displays the staff members total leave entitlement, how much leave has been used and how much is available. The **Used** total when clicked, displays a breakdown of leave transactions that comprise the total.

STAFF EVENTS

This dashlet displays the number of **outstanding** events for the staff member. The total, when clicked navigates to the Staff Events page which displays a list of outstanding events. Additional tabs display Current, Open and Complete events.

The second line of the dashlet indicates the number of clients that need to be contacted within the next x number of days. Clicking onto the numeric value will navigate through to the Keep In Touch page.

MESSAGES

Displays the total of IRIS Practice Engine™ generated messages, by whether they are **Not Read** or **Not Actioned**. A breakdown can be viewed by clicking on the total.

Many actions within the system generate messages; these include **Workflow**, **Events, Assurance** and the use of **PE Filer**.

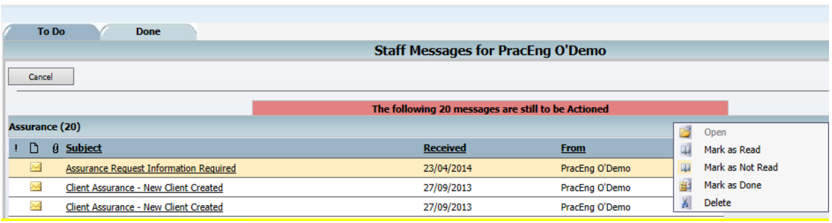
Messages have a context menu associated with them. Possible actions are: Open, Mark As Not Read, Mark As Done and Delete.

If the message is 'Task Generated', a **Task Details** button will be available, clicking it will open the task details. If a message is 'Event Generated', an **Event Details** button will be available and clicking on it will display the event details.

Clicking on the **Done** button will mark the message as **Complete.**

By clicking the **Reply** or **Forward** buttons it is also possible to send or forward the message to another member of staff. The **subject** and the **body** of the message can be edited and the staff member changed by clicking the search icon and performing a staff search.

Right Clicking onto the top level of the messages, will display a context menu whose actions are applied to all messages within that level. This allows for all messages within the section to be marked as Read, Not Read, Done or Deleted.



DRAFTS AS OWNER

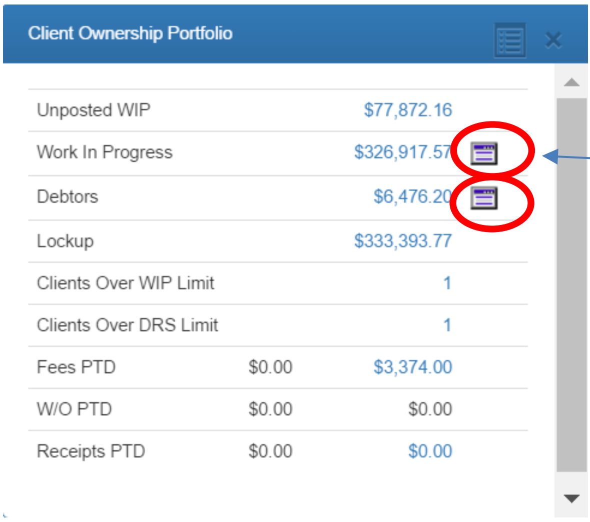
This dashlet displays the number of draft bills, credit notes and zero bills for the logged in staff member where the staff member is the Bill Partner/ Manager on the draft. Clicking on any of the totals will display the Billing Portfolio.

DRAFTS FOR CREATOR

This dashlet displays the number of draft bills, credit notes and zero bills created by the logged in staff member. Clicking on any of the totals will display the Drafts For Creator section within the Billing Portfolio.

CLIENT (PARTNER/ MANAGER) OWNERSHIP PORTFOLIO

(Data is only visible on Client partner and manager dashboards.) This dashlet shows the Portfolio View totals. These are calculated totals from the accounts of clients allocated to the selected partner/manager.



Link to Aged WIP and Aged DRS

Portfolio Figure:	**Description:**
Unposted WIP:	Total of any unposted WIP against the clients within the portfolio.
Work In Progress:	The WIP total for all the staff member's allocated clients. An icon to the right of the WIP figure will navigate through to the Aged WIP portfolio screen.
Debtors:	Total Debtor balance for every one of the staff member's allocated clients. An icon to the right of the DRS figure will navigate through to the Aged DRS portfolio screen.
Lockup:	Total balance of the staff member's allocated clients (DRS+WIP) accounts.
Clients over WIP Limit:	Shows the total of clients whose outstanding WIP is higher than the **WIP Limit** total, specified in their WIP/Billing details.
Clients over Debtors Limit:	Shows the total of clients whose outstanding Debtor balance is higher than the **Credit Limit** total, specified in their DRS/ Collection details.
Bills PTD:	Shows the total balance of bills dated within the current period to date (for the selected partner/manager). This value can be drilled into to display a grid of the breakdown.

W/O PTD:	Shows the total balance of write offs dated within the current period to date (for the selected partner/ manager)
Receipts PTD:	Shows the total balance of receipts dated within the current period to date (for the selected partner/manager). This value can be drilled into to display a grid of the breakdown.
Out of Scope	Shows the number of Out of Scope hours and the value of the Out of Scope work. This value can be clicked into to navigate through to the Out of Scope portfolio within the Billing Portfolio.

Clicking the **total** on any portfolio view figure will display a list of all the clients that comprise the balance and will give a full breakdown of the total.

This portfolio is configurable with the options: - Show Clients over WIP limit, Show Clients over DRS limit, Show Bills Value, Show W/O value, Show Receipts, Show Budgets value, Show values where I am the Client Partner/ Manager.

If Budget values have been selected to be shown, an additional column will be displayed for the Bills PTD, W/O PTD and Receipts PTD giving the entered budget figures against the Staff Budgets for the staff member.

JOB PORTFOLIO

This Portfolio view is only available on Partner, Manager and In Charge dashboards and shows the calculated totals for the accounts of clients were the selected partner, manager or in charge is allocated to the job.

Portfolio Figure:	**Description:**
Unposted WIP:	Total of any unposted WIP against the clients within the portfolio.
Lockup:	Total balance of the DRS and WIP accounts for the selected staff member’s allocated jobs.
Work In Progress:	The outstanding WIP total for all the staff member’s allocated jobs. An icon to the right of the WIP figure will navigate through to the Aged WIP portfolio screen.
Debtor:	Total debtor balance for the staff member’s allocated jobs. An icon to the right of the DRS figure will navigate through to the Aged DRS portfolio screen.
Clients over WIP Limit:	Shows the total of clients whose outstanding WIP is higher than the **WIP Limit** total, specified in their WIP/Billing details.
Clients over Debtors Limit	Shows the total of clients whose outstanding Debtor balance is higher than the **Credit Limit** total, specified in their DRS/ Collection details.
Bills PTD:	Shows the total balance of bills dated within the current period to date (for the selected partner/ manager). This value can be drilled into to display a grid of the breakdown.

W/O PTD:	Shows the total balance of write offs dated within the current period to date (for the selected partner/ manager)
Receipts PTD:	Shows the total balance of receipts dated within the current period to date (for the selected partner/ manager). This value can be drilled into to display a grid of the breakdown.
Out of Scope	Shows the number of Out of Scope hours and the value of the Out of Scope work. This value can be clicked into to navigate through to the Out of Scope portfolio within the Billing Portfolio.

Clicking the **total** on any portfolio view figure will display a list of all the clients that comprise the balance and will give a full breakdown of the total.

This portfolio is configurable with the options: - Show Clients over WIP limit, Show Clients over DRS limit, Show Bills Value, Show W/O Value, Show Receipts, Show Budgets Value and Show Values Where I am The Job Partner/ Manager/ in Charge.

SERVICE PORTFOLIO

This Portfolio view is available for Partners, Managers and staff members and shows the calculated totals for the accounts of clients where the selected person is set as the Service Partner, Manager or In Charge.

Portfolio Figure:	**Description:**
Unposted WIP:	Total of any unposted WIP against the clients within the portfolio.
Lockup:	Total balance of the DRS and WIP accounts for the selected staff member's allocated services.
Work In Progress:	The outstanding WIP total for all the staff member's allocated services. An icon to the right of the WIP figure will navigate through to the Aged WIP portfolio screen.
Debtor:	Total debtor balance for the staff member's allocated services. An icon to the right of the DRS figure will navigate through to the Aged DRS portfolio screen.
Clients over WIP Limit:	Shows the total of clients whose outstanding WIP is higher than the **WIP Limit** total, specified in their WIP/Billing details.
Clients over Debtors Limit	Shows the total of clients whose outstanding Debtor balance is higher than the **Credit Limit** total, specified in their DRS/ Collection details.
Bills PTD:	Shows the total balance of bills dated within the current period to date (for the selected partner/ manager). This value can be drilled into to display a grid of the breakdown.
W/O PTD:	Shows the total balance of write offs dated within the current period to date (for the selected partner/ manager)

Receipts PTD: Shows the total balance of receipts dated within the current period to date (for the selected partner/ manager). This value can be drilled into to display a grid of the breakdown.

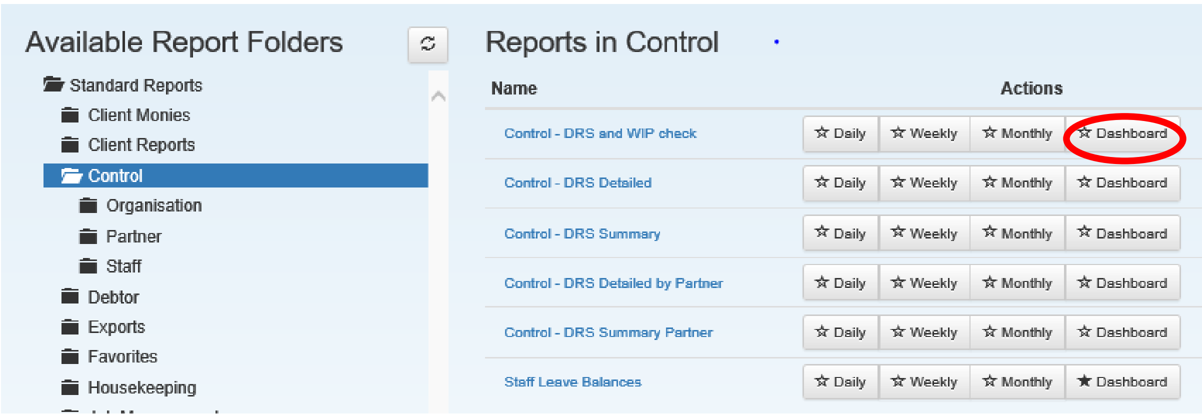
Out of Scope Shows the number of Out of Scope hours and the value of the Out of Scope work. This value can be clicked into to navigate through to the Out of Scope portfolio within the Billing Portfolio.

Clicking the **total** on any portfolio view figure will display a list of all the clients that comprise the balance and will give a full breakdown of the total.

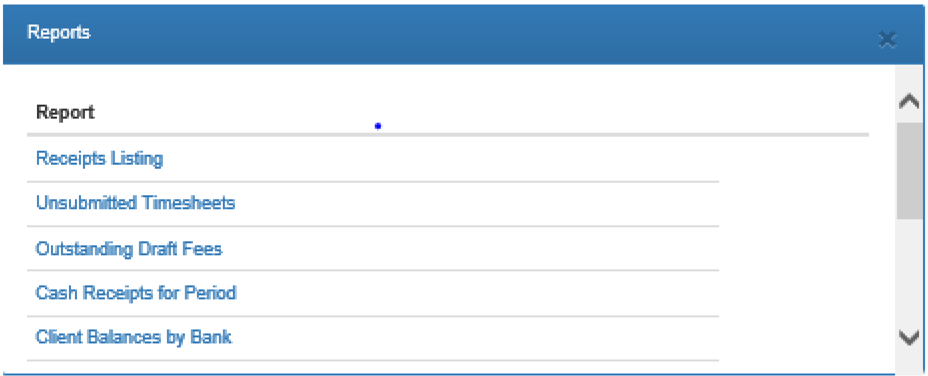
This portfolio is configurable with the options: - Show Clients over WIP limit, Show Clients over DRS limit, Show Bills Value, Show W/O Value, Show Receipts, Show Budgets Value and Show Values Where I am The Service Partner/ Manager/ in Charge.

REPORTS

This dashlet will display any reports that have been added to Dashboard Report Favourites within the Reporting menu.



The Report can be viewed by clicking onto the Report name which will open the report in a new tab displaying the Reports application The report dates and ranges can be set within the new tab but will only be available of the report supports dates or ranges.



STAFF PRODUCTIVITY

This dashlet shows the Chargeable Value and Hours, Chargeable and Non-Chargeable time posted for the selected staff member, as well as the Total Hours and percentage of Chargeable time against Total Hours. The information is displayed as both PTD and YTD.

This portfolio is configurable with the options: - Show Values and Show Budgets. Budget information is derived from values entered on the Staff Budgets page.

ASSURANCE DETAILS

Shows the status and total number of requests for new contact/clients and is grouped by **Saved**, **Returned**, **Submitted** and **Approved.** Clicking on any of these **headings** will display a list of all current requests for the staff member. Clicking on the Open Request link will display the setup details of that request.

Depending on the level of permissions that the staff member has there are three options that can be displayed within the assurance section of the dashboard. These are Validations, Questionnaires and Gatekeeping. Each option will only be visible for selection from the staff dashboard if there is an outstanding or current request within that particular section of the assurance process. Clicking on the **heading** will display a list of those sections entries.

TOP N CLIENTS

Shows the top/ bottom 5 or 10 clients by Bills, Collections, Profit or Realisations for the client partner or manager. The information is calculated based on the period to date.

STAFF KEY PERFORMANCE INDICATORS

The IRIS Practice Engine web system provides a number of Key Performance Indicators (K.P.I.'s) relating to clients and staff members. This section describes the indicators in the system and provides examples of some of the complex indicators.

KPI:	Description:
Cost Velocity:	This value indicates the rate at which effort (i.e. time entered into a timesheet) is turned into bills. For example: x hours of effort is posted against a client, that effort is billed exactly one year later the cost velocity is 1 (i.e. time is billed once a year). x hours of effort is posted against a client, that effort is billed exactly one month later the cost velocity is approximately 12 (i.e. time is billed twelve times a year).
Cost Turnaround:	This value describes how many days it takes on average to turn time worked (i.e. entered into a timesheet) into bills.
Average Charge per Hour:	How much is charged per hour based on time posted.
Average Bill per Hour:	Similar to average charge per hour but is based on how much is actually billed to a client. Therefore, this value takes into account write ups and off.
Revenue Velocity:	This value indicates the rate at which bills issued are turned into cash. For example: £x is billed to a client, that bill is paid exactly one year later, the cost velocity is 1 (i.e. bills are paid once a year). £x is billed to a client, that bill is paid exactly one month later, the cost velocity is 12 (i.e. bills are paid twelve times a year).
Revenue Turnaround:	This value describes how many days it takes on average to receive payment after invoices are issued.

GLOBAL PRODUCTIVITY

This dashlet provides information regarding the productivity for the entire firm. It displays both PTD and YTD information for Chargeable Value, Chargeable Hours, Non Chargeable Hours and Total Hours. The %age figure is calculated based on Chargeable Hours/ Total Hours. The **values** for Chargeable Value, Chargeable Hours and Non Chargeable Hours can all be drilled into to determine how they have been achieved.

This portfolio is configurable with the options: - Show Values and Show Budgets. Budget information is derived from values entered on the Staff Budgets page.

GLOBAL PORTFOLIO

This dashlet provides a firm wide view of information relating to Unposted WIP, WIP, DRS, Lockup, Bills PTD, W/O PTD and Receipts PTD. The figures for WIP, DRS and Lockup can all be drilled into. There are also links to the Aged WIP and Aged DRS for the firm.

This portfolio is configurable with the option of choosing whether the drill down links go through to the Client or Job level portfolio.

DEPARTMENT PRODUCTIVITY

This provides information relating to the productivity figures for the staff member's department. It displays both Period To Date and Year To Date information for Chargeable Value, Chargeable Hours, Non Chargeable Hours and Total Hours. The **values** for Chargeable Value, Chargeable Hours and Non Chargeable Hours can all be drilled into to determine how they have been achieved.

TOP DEBTS

This dashlet displays the staff member's total outstanding debts, the value of the 5 largest debts and the value of the debts that are over 90 days. The 5 largest debts are listed as drillable links.

PROSPECTS

The Prospects dashlet provides a view of the Prospects and Opportunities that the staff member has either created or marked as a favourite. Clicking onto the number of Prospects or opportunities will navigate through to the Staff Member's 'My Prospects' page. The Total Value of the budgets set against the opportunities is also displayed. The Ranked Value is calculated based on the percentage multiplier of the Opportunity Status against the budgeted value of the opportunity.

It is also possible to create new Prospects from this dashlet using the **Add Prospect** button, which will open the New Prospect Details pages.

LATEST NEWS

The Latest News dashlet will display news items that have been created by an Administrator.

CLIENT SERVICE BUDGETS

This dashlet has been written specifically for a client and works against hard coded service budget types.

CLIENT SERVICE AGEING

This dashlet has been written specifically for a client and works against hard coded service budget types.

JOBS IN POOL

The Jobs In Pool dashlet displays any jobs that have been assigned to Pool placeholder staff when forwarding the job. Clicking onto the Pool name will open the Staff Jobs page for the pool.

SUMMARY OF STAFF DASHLETS

The following table indicates the intended audience for each dashlet and whether it is editable or not.

Dashboard	Dashlet	Editable	Target Audience
Staff	Timesheets	Yes	All Users
Staff	Jobs	No	Job Partners, Job Managers and Job In Charges
Staff	Tasks	No	Anyone assigned to tasks within workflow
Staff	Leave	No	All Users
Staff	Staff Events	No	All Users
Staff	Messages	No	Assurance, Workflow users
Staff	Drafts As Owner	No	All Bill Drafters
Staff	Drafts For Creator	No	All Bill Drafters
Staff	Partner/ Manager Portfolio	Yes	Partners and Managers
Staff	Job Portfolio	Yes	Job Partners, Job Managers and Job In Charges
Staff	Service Portfolio	No	Service Partners, Service Managers and Service In Charge
Staff	Reports	No	All Users who run reports
Staff	Staff Productivity	Yes	All chargeable staff
Staff	Assurance	No	All Assurance Users
Staff	Top N Clients	No	Partners and Managers
Staff	Staff KPI	No	All chargeable staff
Staff	Tax Return Controls	No	All Tax staff
Staff	Department Productivity	Yes	Department Heads
Staff	Global Portfolio	Yes	Partners
Staff	Global Productivity	Yes	Partners
Staff	Top Debts	No	Partners
Staff	Prospects	No	Partners, Managers, Marketing
Staff	Latest News	No	All Users
Staff	Jobs In Pool	No	All Users

CLIENT DASHBOARD

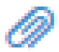
The Client Dashboard collates information relating to the client that the user likes to see. A client must have been selected before the dashboard will be displayed.

The dashlets that are available on the Client Dashboard (permissions allowing) are listed below:

ACTIONS

This dashlet allows a user to enter either time or expenses to the selected client. The Client Actions dashlet will display two icons:


Creates a new timesheet entry for the selected client in the current timesheet for the present day. A current week's timesheet must be available.


Creates a new expense entry for the selected client in the latest expense claim created.

BILL REVIEW

This dashlet provides a way of recording the date of the last bill review and the next bill review. It also records who the updated the last bill review information.

BILLING CYCLE

This dashlet has been written specifically for a client and works against hard coded service budget types.

DRAFT BILLS & CREDIT NOTES

This dashlet displays all the current drafts available on the selected client and are broken down into

- Draft Bills
- Draft Credit Notes
- Draft Zero Bill
- Zero Bill Reversal
- Draft Allocations
- Jobs Due for Billing
- Out of Scope

Clicking on the **number** will display a list of current drafts (bills, credit notes, zero bills, allocations) for the selected client. It is also possible to create new draft bills and credit notes by using the **New** button, which will open the Draft Wizard for the relevant type.

The Jobs due for Billing will indicate the number of jobs that have a billing type of Based on Job that are due for billing. This is dependent on the job being complete and having outstanding WIP against it. Clicking onto the number will navigate through to the Billing Portfolio where the bills can be drafted.

The Out of Scope line will indicate the number of jobs with Out of Scope time that has not been reviewed. Clicking onto the number will navigate through to the Billing Portfolio so that the time can be reviewed.

CLIENT SERVICE AGEING

This dashlet has been written specifically for a client and works against hard coded service budget types.

CLIENT SERVICE BUDGETS

This dashlet has been written specifically for a client and works against hard coded service budget types.

CLIENT CREDIT CONTROL

This provides information relating to Bills, WIP, DRS and the last recorded transactions. The value of bills posted against the client is displayed for the last 12 months, YTD and PTD. The WIP and DRS figures are grouped by Total, 0 – 45 days and Older. The dashlet also displays the Credit Contact's name, phone number and email address as derived from the information contained on the DRS/ Collection page of the Client Details. The WIP and DRS **values** can be clicked onto to view the detailed transactions.

DETAILS

This displays the basic client details of address, telephone, mobile, fax and email. It is also configurable with the options of: - Show Fax, Show Other Addresses, Show Other Phones, Show Other Email.

> Tip: The email hyperlink can be clicked to compose a new blank email

ENTRIES

This displays the last entries for the selected client. The last bill date, the last receipt date and the date of the last timesheet entry.

EVENTS

Shows the number of events that are outstanding for the client. Clicking onto the **number** of outstanding events navigates to the client events page.

CLIENT FINANCIAL/ CLIENT FINANCIAL WITH PROVISIONS

This dashlet displays the client's financial details as detailed:

Debtors:	Debtor total currently outstanding on the clients account.
WIP:	Total Work in Progress currently outstanding on the clients account.
Lockup:	Total balance of the clients account (Debtors + WIP).

> Tip: A tool tip feature has been added to the WIP section on the client's financial details. To view this hover over the WIP total to show the amount of WIP that is currently held in draft bills.

The financial totals for the Debtors and the WIP can be clicked upon to view a breakdown showing all the entries that make up the total, these totals can then be printed using reports generated from the print tab within.

If the client is part of a group, the group Debtors, WIP and Lockup information will be displayed. The **Lockup** figure is drillable and will show the breakdown of the group figures by group client.

An additional dashlet entitled Client Financials with Provisions is also available. This gives the same information as the Client Financials dashlet with additional information regarding any provisions that have been entered against the client. It also provides information about the average WIP and DRS days and the percentage of WIP and DRS that is over 90 days old.

JOBS

This dashlet displays the number of Overdue, In Progress and Active jobs for the client. Clicking onto any of the displayed **figures** will navigate through to the Job List page for the client.

CLIENT KPI

This dashlet lists the 'Key Performance Indicators' for the client.

KPI:	Description:
Cost Velocity:	This value indicates the rate at which effort (i.e. time entered into a timesheet) is turned into bills. For example: x hours of effort is posted against a client, that effort is billed exactly one year later the cost velocity is 1 (i.e. time is billed once a year). x hours of effort is posted against a client, that effort is billed exactly one month later the cost velocity is approximately 12 (i.e. time is billed twelve times a year).
Cost Turnaround:	This value describes how many days it takes on average to turn time worked (i.e. entered into a timesheet) into bills.
Average Charge per Hour:	This value describes the average hourly rate charged to this client.
Average Bill per Hour:	Similar to average charge per hour but is based on how much is actually billed to a client. Therefore, this value takes into account write ups and off.
Revenue Velocity:	This value indicates the rate at which bills issued are turned into cash. For example: £x is billed to a client, that bill is paid exactly one year later, the cost velocity is 1 (i.e. bills are paid once a year). £x is billed to a client, that bill is paid exactly one month later, the cost velocity is 12 (i.e. bills are paid twelve times a year).
Revenue Turnaround:	This value describes how many days it takes on average to receive payment after invoices are issued.

LETTER PRINTING

This dashlet allows for the generation of a letter to the client from a set of templates. There is the choice of which contact and which contact address to send the letter to, and then a choice of letter.

OPPORTUNITIES

The Client Prospects dashlet displays the Opportunities for the client, with the associated Total Value and Ranked Value of the opportunities. It also provides a link to the Prospects module to add a new opportunity for the client.

REALISATION

This graph shows bills and write offs per month for the client. It can be toggled to show either the current year or a five year trend for the client. The point where Bills meet the Write Offs is the realisation percentage.

RECENT EVENTS

This dashlet displays the latest events and a summary of the details that have been recorded against the client. This is a view only dashlet.

CLIENT RISK

Holds information relating to the perceived risk level of the client. It displays the current risk level and when it was set, provides a method for updating the risk level and adding notes. This dashlet is for information purposes only. The available levels are No Risk; Low Risk, would recommend; Recent Problem, but happy; Multiple Problems, not happy; High Risk and Client Lost. Notes can be applied against each entry/ change of risk level and are stored in the tables.

CLIENT SATISFACTION

This dashlet records satisfaction levels for the client. The level can be recorded as an Overall Score or against a particular service. There are Poor, Room for Improvement, Meets our Expectations, Good, Very Good and No Level. Clicking onto the **Details** button next to the overall Level will display the detailed Service satisfaction levels assigned to the client.

CLIENT OWNERSHIP/ STAFFING

This displays the Organisation, Office, Department, Sub-Department, Status, Partner, and Manager assigned to the client.

SUMMARY OF CLIENT DASHLETS

The following table indicates the intended audience for each dashlet and whether it is editable or not.

Dashboard	Dashlet	Editable	Target Audience
Client	Actions	No	All chargeable staff
Client	Bills	No	All Bill Drafters
Client	Bill Review	No	All Users
Client	Bill Cycle	No	All Users
Client	Client Service Aging	No	
Client	Client Service Budgets	No	
Client	Credit Control	No	Partners, Managers and Credit Controllers
Client	Details	Yes	All Users
Client	Entries	No	All Users
Client	Events	No	All Users
Client	Financial	No	All Users
Client	Financial with Provisions	No	All users
Client	Jobs	No	All Users
Client	KPI	No	All Users
Client	Letter Printing	No	All Users
Client	Opportunities	No	Partners, Managers and Marketing
Client	Realisation	No	Partners and Managers
Client	Recent Events	No	All Users
Client	Risk	No	All Users
Client	Satisfaction	No	All Users
Client	Staffing	No	All Users

CONTACT DASHBOARD

The Contact Dashboard provides information against the focussed contact. There are 5 available dashlets that are detailed below:

CONTACT DETAILS

Displays the basic contact details (address, telephone, mobile, fax and email)

OTHER DETAILS

This dashlet displays other addresses, number and email addresses as picked up from the 'Other' details page for the contact.

CONNECTIONS

Displays the connected contacts to this contact. Clicking onto a connected contacts name will navigate to that Contact's dashboard.

LETTERS

This dashlet allows for the generation of a letter to the client from a set of templates. There is the choice of which contact and which address to send the letter to, and then a choice of letter.

EVENTS

Shows the number of events that are outstanding for the contact. Clicking onto the **number** of outstanding events navigates to the contact events page.

SUMMARY OF CONTACT DASHLETS

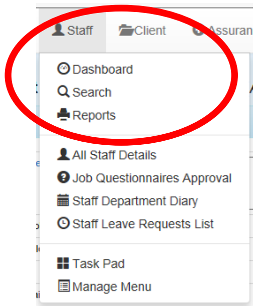
The following table indicates the intended audience for each dashlet and whether it is editable or not.

Dashboard	Dashlet	Editable	Target Audience
Contact	Contact Details	No	All Users
Contact	Other Details	No	All Users
Contact	Connections	No	All Users
Contact	Letters	No	All Users
Contact	Events	No	All Users

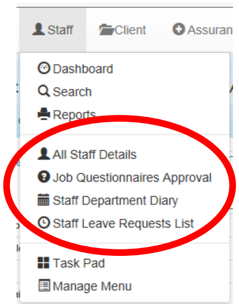
THE MENU

Each user has the ability to customise their own menu to reflect the page items that they use the most. Clicking onto the menu headings will display the available pages.

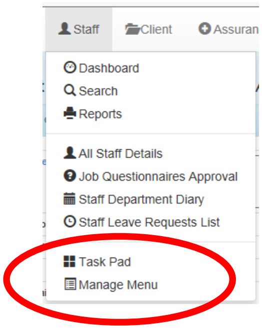
The first section contains commonly used pages.



The next section will contain any pages that the user has added through the Manage Menu option.

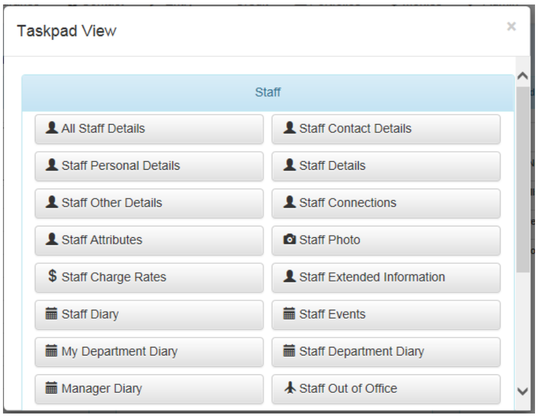


The final section provides options to go to the full list of available pages via the Task Pad and the Manage Menu configuration option.



THE TASK PAD

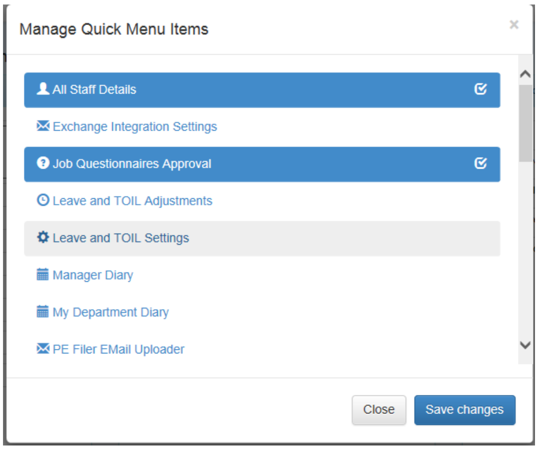
The task pad against each menu heading accesses the full list of pages that the user has permission to view. Clicking onto the Task Pad option will display a Taskpad View. Some menus may have more than one section to the Taskpad.



Clicking onto any page will navigate the user through to that page.

MANAGE MENU

This option allows the user to select up to 10 pages to add to their list of favourites. Clicking onto a page will mark the page as selected.



THE HOME OPTION

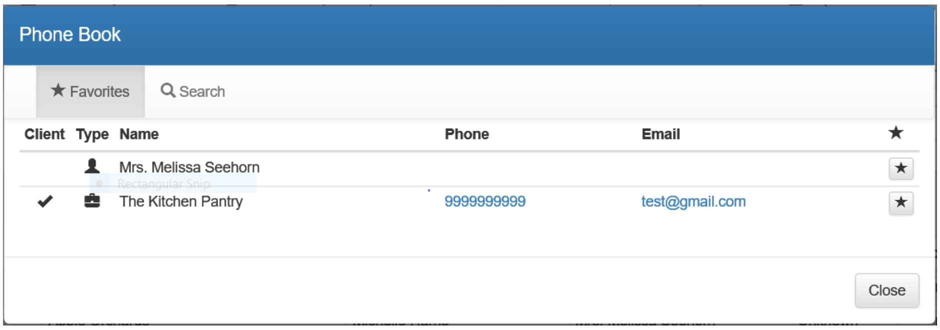
Clicking onto the Home button provides the user with access to Change Password, the Work Timer, the Phone Book Search, a list of quick links and the option to log out of the system. The list of Quick Links is organisation specific but may include the PopUp Timesheet, Client Search, Timesheets and more. There is also a Search Menu option that allows the user to quickly search for a page that they are looking for.

CHANGE PASSWORD

The Change Password links displays a dialog that allows the user to change the password used for IRIS Practice Engine. This is only relevant when Active Directory Trusted Logins are not being used.

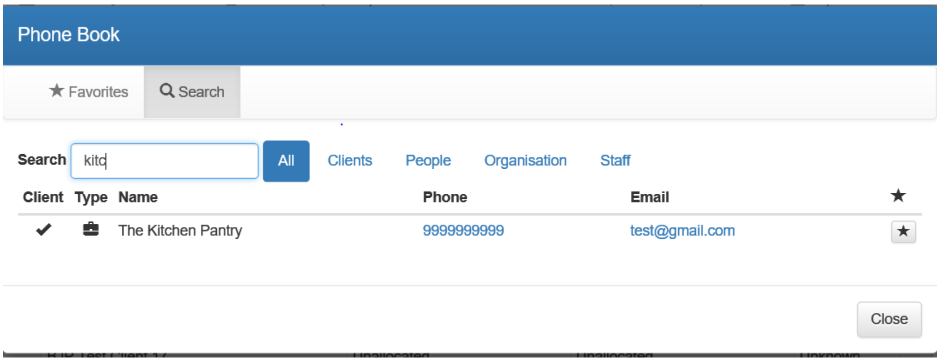
THE PHONE BOOK SEARCH

The Phone Book Search comprises of two sections – Favourites and Search. It will open by default showing the Favourites.



The Favourites section will display any contacts that have been added as favourites. Favourites can be added by clicking onto the star icon next to any contact from the Phone Book search screen.

The search facility will search for all contacts based on the contact name. At least four characters need to be entered. By default the search results include Staff, People, Organisations, and Clients. This can be restricted by clicking onto the contact type next to the Search field.



Each line of the results set can be expanded/ collapsed by clicking onto the contact name. This will display/ hide the contact information for the person/ organisation.

HELP

The Help menu, which is located on the right hand side of the menu, provides access to the current period, the version of IRIS Practice Engine that is installed, Browser Details; providing options to clear session storage and a link to contact Support via ZenDesk.

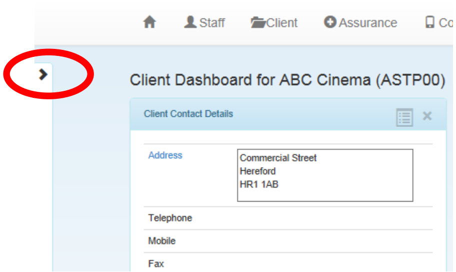
The Get Help Now link opens a dialog that allows the user to easily search for information within the documentation.

SEND FEEDBACK

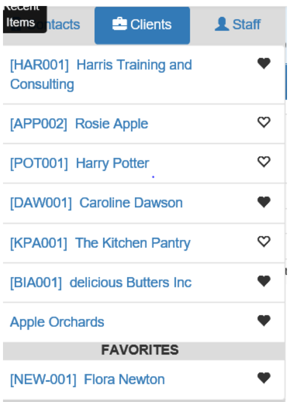
The Send Feedback options displays a dialog, allowing a user to provide feedback on the page that they are currently on. This feedback is emailed through to the IRIS Practice Engine product team.

RECENTLY USED/ RECENT ITEMS (MRU)

The Recently Used list can be accessed by clicking on **>** of the side menu:



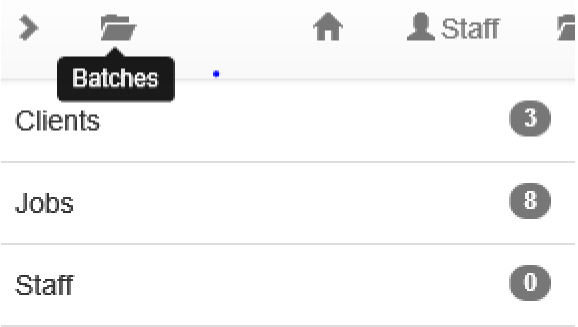
This will expand the list of recently used staff, clients or contacts:



Clicking onto any of these will navigate the user through to the Dashboard/ currently selected page for the selected entity. The list can be collapsed by clicking onto the **<** icon.

BATCHES

The Batches link displays the number of Clients and Jobs that have been added to batches from the Client or Jobs pages. Clicking onto the relevant section will navigate the user through to the Client Bulk Admin page and the Job Bulk Admin page.


Staff
Batches
Clients
3
Jobs
8
Staff
0