

Slide 1 - Title Slide



The slide features a dark blue background with a network of glowing white nodes and lines, overlaid with faint binary code (0s and 1s) and bokeh light effects. The text is centered and presented in a clean, sans-serif font.

IRIS Awareness & Navigation (UK_100)

Presented by Enterprise Applications Training

 **Information
Technology Services**

Slide 2 - Audio Information

Audio

This training course includes audio.
Ensure your speakers or headset volume is adjusted accordingly.



Slide 3 - CC Information

Closed Captioning

Closed Captioning is included in this training course and will be displayed at the bottom of each slide by default.



To turn it off, click on the Closed Captioning icon in the playbar below.

Slide 4 - Slide 4

Course Content

- Unit 1: IRIS Introduction
- Unit 2: myUK Portal
- Unit 3: IRIS Production System
- Unit 4: Global Concepts
- Unit 5: IRIS Training
- Unit 6: IRIS Support Resources



Slide 5 - Unit Intro Slide

Unit 1: IRIS Introduction



Slide 6 - Slide 6

Enterprise Applications

The Enterprise Applications department (EA) is a division of the University of Kentucky's Information Technology Services (ITS).

EA is comprised of ITS staff as well as other members assigned from the major business units of the University.

The department is responsible for enhancing, maintaining and supporting the functional operations of the Enterprise Resource Planning (ERP) system, **SAP**, to accomplish and further the goals and objectives of the various operational units across campus.



Slide 7 - Slide 7

SAP

SAP stands for Systems, Applications and Products.

It is pronounced as three individual letters (S-A-P).

SAP is also the name of the German-based company that produces the software.



Slide 8 - Slide 8

IRIS

Beginning in 2004, the SAP software was configured by EA team members, alongside SAP consultants, to meet UK's specific administrative, service and academic business needs and given the name IRIS (Integrated Resource Information System).



Implementation of this system at UK was a phased process that began in October of 2005.

Slide 9 - Slide 9

IRIS Core Applications/Modules

The core applications utilizing the various modules of the IRIS system are:

- Budget Services
- Enterprise Content Management (ECM)
- Facilities Services/Plant Maintenance (PM)
- Financial Services (FI)
- Graduate School
- Human Resource Services & Training (HR)
- Procurement Services (MM/SRM)
- Student Lifecycle Management (SLCM)
- Workflow Services

Slide 10 - Slide 10

IRIS Integration

A key advantage of IRIS is integration, which allows for:

- data to flow immediately throughout the various modules;
- users to have real-time access to common information;
- better planning and decision-making through access to comprehensive and consistent business information; and
- fewer phone calls to other departments.

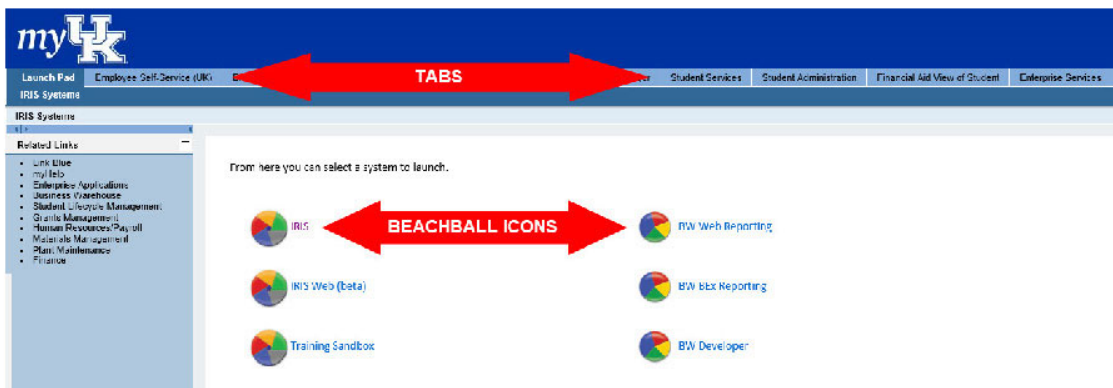
Example integration points:

- Person ID (HR) is integrated with Student ID (SLCM).
- Purchased materials (MM) are charged to cost objects (FI).
- Payroll expenses (HR) are charged to cost objects (FI).

Slide 11 - Slide 11

IRIS Access

The core applications of IRIS are accessed inside the University's **myUK portal** via various tabs and beachball icons. (More on myUK will be covered in Unit 2.)



NOTE: The tabs and icons available in your myUK portal are based on your specific access needs, which may differ than the screen shot above.

Slide 12 - Slide 12

IRIS Access Requirements

IRIS employs role-based security, which controls a user's access; access is granted based on a user's role and job responsibilities.

In order to obtain IRIS access, a user must:

- have an active **linkblue** username and **password**;
- ensure the **SAPGUI** software is installed;
- have an approved **IRIS Training Plan*** in place; and
- successfully complete the **Statement of Responsibility** and all other **mandatory training courses** listed in their IRIS Training Plan.*



*This topic will be covered later in the **IRIS Training** unit.

Slide 13 - Slide 13

SAPGUI

The SAPGUI is a required software application used to connect to the IRIS Production and Training Systems.

It is available on the **ITS Software Downloads** website*.

- <https://download.uky.edu>
- use linkblue credentials to sign in
- search for **SAPGUI**
- click on **See Downloads** button



* You must have administrative rights on your machine in order to perform the installation; otherwise, contact your area's IT personnel or help desk for assistance.

Slide 14 - Slide 14

Other IRIS Access Information

IRIS may be accessed from any computer on campus, as long as the SAPGUI software is installed.

IRIS may also be accessed remotely, such as from a home computer.

- Both the **SAPGUI** and **GlobalProtect VPN** software must be installed. The software can be obtained by one of the following methods:
 - ITS Software Downloads website (<https://download.uky.edu/>) (You must have administrative rights on your computer in order to install the software yourself.)
 - Request assistance from your department's IT personnel
 - Contact ITS Customer Services for assistance, (859) 218-HELP (4357)
- Once installed, you would sign on to the VPN first, and then sign on to myUK in order to access IRIS.

Slide 15 - Slide 15

IRIS Security

Your username and password must not be shared with others.

When stepping away from your PC, even if for just a brief moment, keep your access secure by locking the computer (**Ctrl + Alt + Delete** --> **Lock** option).

For extended periods of time, close all IRIS sessions, sign off of myUK, and completely close the internet browser window.

If prompted, do not allow your PC to remember any usernames and/or passwords.



Security Audit Log

IRIS tracks and logs events as they occur so that a series of events can be reconstructed at a later date in an audit analysis report.

Only selected users have access to the audit analysis report.

Some example information contained in the audit log:

- Audit event
- User's linkblue ID
- Transaction code
- Time and date of when the event occurred
- Session number
- Old and new information

Slide 23 - Slide 23

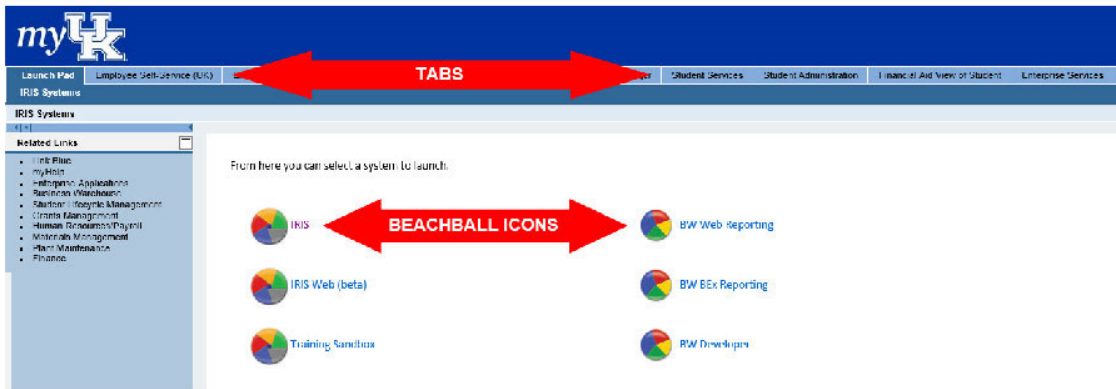
Unit 2: myUK Portal



Slide 24 - Slide 24

myUK Portal

The myUK portal is a web-based dashboard that contains tabs and icons to all of the various core applications in IRIS.

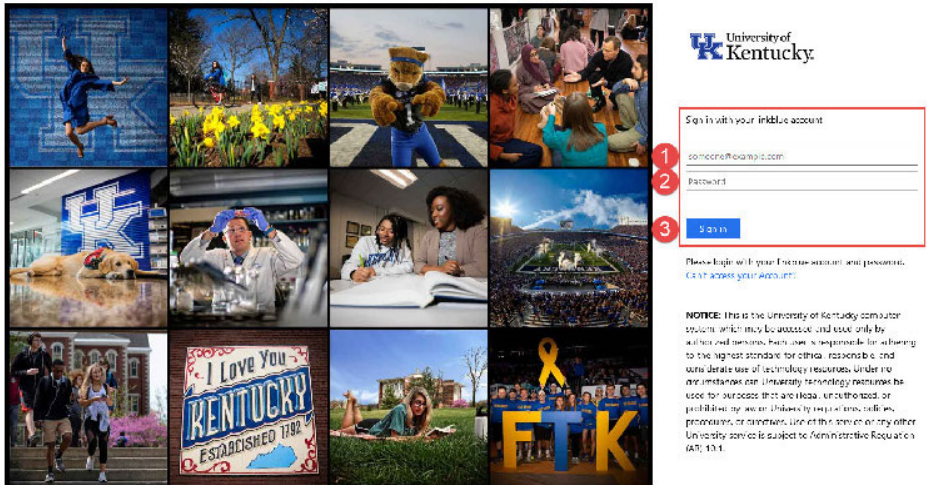


NOTE: The tabs and icons available in your myUK portal are based on your specific access needs, which may differ than the screen shots seen in this unit.

Slide 25 - Slide 25

myUK Portal Access

To access myUK, enter your linkblue ID (1) and password (2) on the sign in page (located at <https://myuk.uky.edu/irj/portal>), and then click on the Sign in button.



University of Kentucky

Sign in with your linkblue account

1 someone@example.com

2 Password

3 Sign in

Please login with your Facebook account and password.
[Click to access your Web site.](#)

NOTICE: This is the University of Kentucky computer system which may be accessed and used only by authorized persons. Each user is responsible for adhering to the highest standards for ethical, responsible, and secure use of technology resources. Under no circumstances can University technology resources be used for purposes that are illegal, unauthorized, or prohibited by law or University regulations, policies, procedures, or standards. Use of this system and any other University services is subject to Administrative Regulation (AR) 13.1.

Slide 26 - Slide 26

myUK Portal Access (Continued)

The sign in page can be accessed also by clicking on the myUK logo on UK's home page (<https://www.uky.edu/UKHome>).



Slide 27 - Slide 27

myUK Portal Access (Continued)

You will next need to perform the DUO/multi-factor authentication process.



University of Kentucky

Welcome A [redacted]
In an enterprise, additional information is needed to fully secure your account.

Remember me on this device

I am not a robot

© 2019 Microsoft. All rights reserved.

Slide 28 - Slide 28

myUK Tabs

Several of the IRIS core applications/processes are accessed via the various tabs and sub-tabs across the top of the myUK page.



Some are automatically available for users, for example:

- **Student Services**
- **Faculty Services**
- **Employee Self Service**

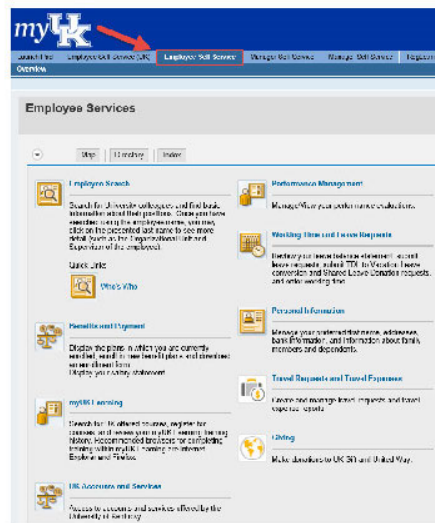
Others are obtained after completing required training indicated in an user's IRIS Training Plan, for example:

- **Launch Pad:** IRIS Production System, Business Warehouse
- **Enterprise Services:** Cash Transmittals
- **Shopper:** Shopping cart for certain purchases

Employee Self Service (ESS)

Just as an example, the **Employee Self Service (ESS)** tab provides several key functions for employees. They can:

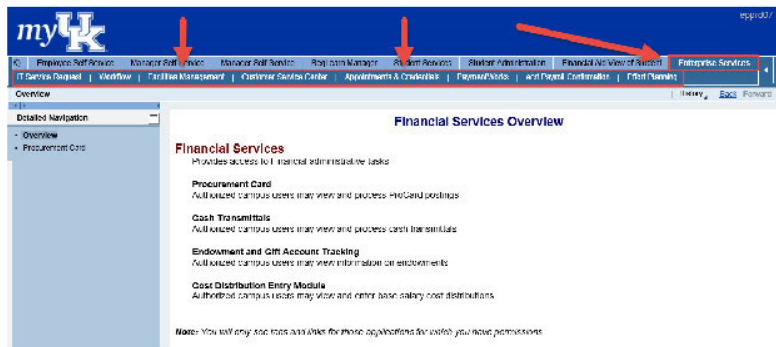
- View Pay Statement
- Manage/View benefits
- Access myUK Learning
- Manage/View performance evaluations
- Enter work time and leave requests
- Change home and work addresses
- Update direct deposit information
- And more!



Slide 30 - Slide 30

Enterprise Services

As another example, the **Enterprise Services** tab and sub-tabs provide access to some training-based functions such as processing cash transmittals.



One sub-tab that is available for all users is **Facilities Management**, which is used to submit work requests to Facilities/Physical Plant.

There are other sub-tabs possible; these are just a couple examples.

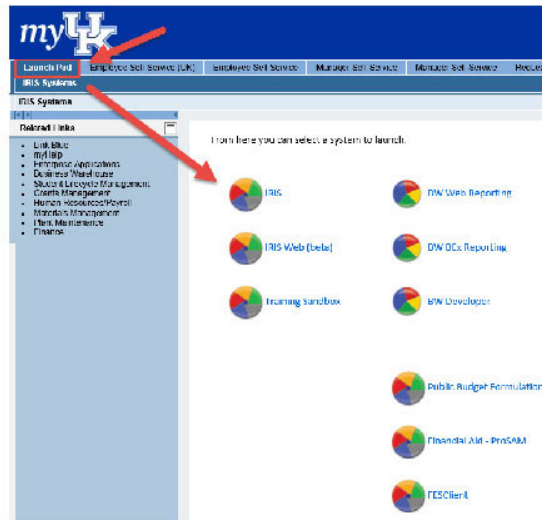
Slide 31 - Slide 31

Launch Pad

The **Launch Pad** tab provides access to various beachball icons, which are made available to employees after the completion of the required training from their IRIS Training Plan.

Two primary icons are:

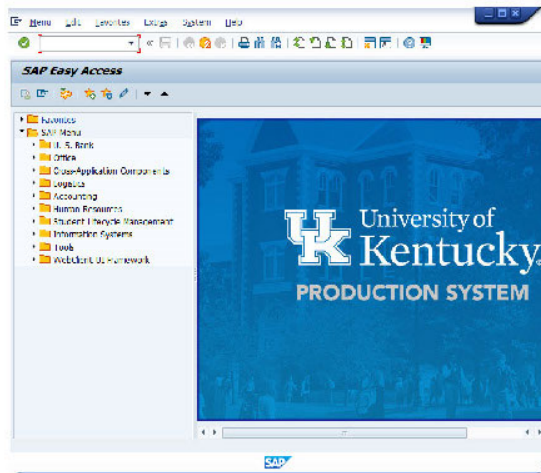
- IRIS
- Training Sandbox



Slide 32 - Slide 32

IRIS Icon

The IRIS icon provides access to the IRIS Production System, which contains numerous transactions used to process various business functions for the different core applications.



This icon is available only after the required training has been completed.

Training Sandbox Icon

The **Training Sandbox** provides access to the IRIS Training System and is:

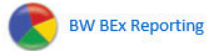
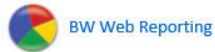
- a copy of the IRIS Production System, but contains fictional data;
- used in conjunction with some IRIS courses for training purposes;
- a great tool to practice and further improve your understanding and skills with the transactions covered in the training courses;
- refreshed every Friday evening; data entered/saved during the week is cleared; and
- accessed via the **Training Sandbox** beachball icon on the myUK Launch Pad screen, which should be available for you within 1-2 business days after successfully completing this course.



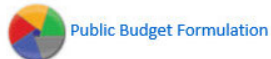
Other Icons

There are a couple other Launch Pad icons to briefly mention as well.

- The **BW** icons are used to access SAP's Business Warehouse system for reporting purposes.



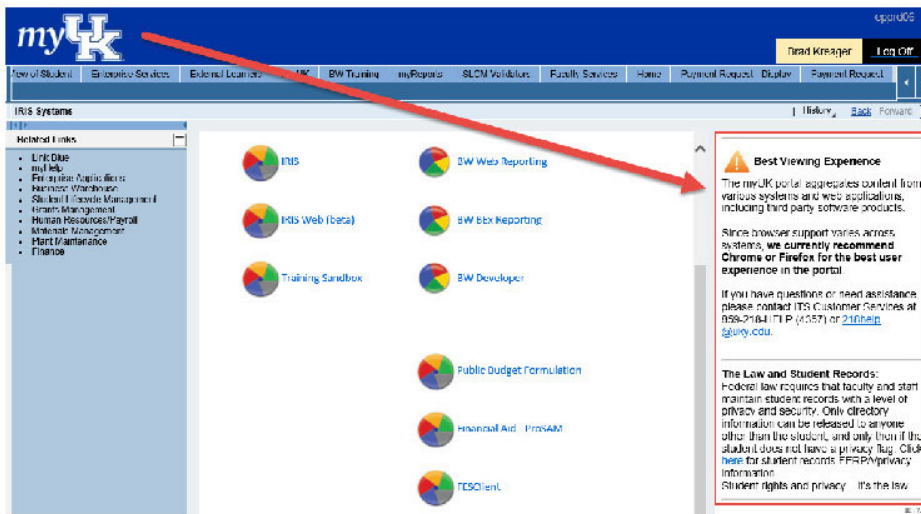
- The **Public Budget Formulation** icon is used to access the PBF system by departmental budget officers who are responsible for entering and preparing their annual salary proposals and budgets.



Slide 35 - IRIS News Section highlighted

IRIS News Section

The right section of the myUK screen contains important IRIS system information and other news items. **Be sure to review frequently!**

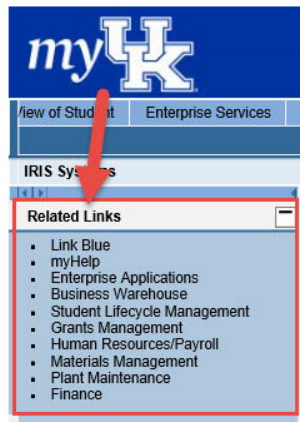


Slide 36 - Slide 36

Related Links Section

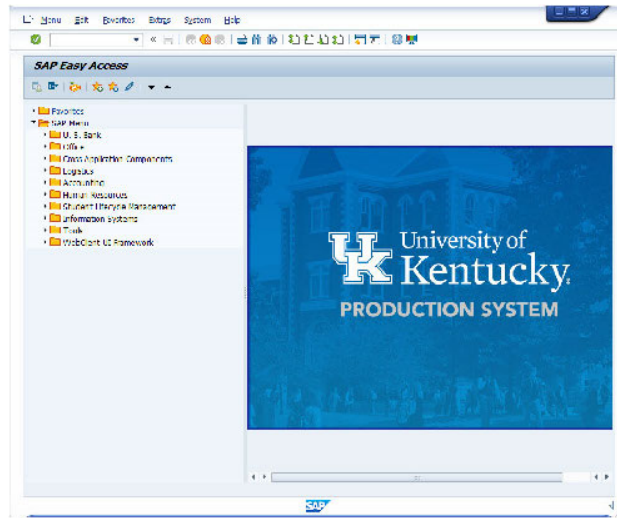
The **Related Links** section can be used to access the various listed core applications' websites.

The **myHelp** website contains custom UK course materials associated with all of the transactions and processes covered in the IRIS training courses.



Slide 42 - Slide 42

Unit 3: IRIS Production System



Slide 43 - Slide 43

IRIS Production System

The IRIS Production System, accessed via the **IRIS** beachball icon on the myUK Launch Pad screen, is the main component of SAP.

There are numerous business transactions performed directly in the Production System.

Data from the transactions processed in several of the myUK tabs/sub-tabs all feeds back to the Production System as well. For example:

- Employee addresses, preferred first name, and bank detail changes made in the ESS tab creates new records in the employee's HR master data record.
- The costs from items purchased via the Shopper tab are applied to cost objects in the Finance module.

Slide 44 - Slide 44

SAP Easy Access Screen

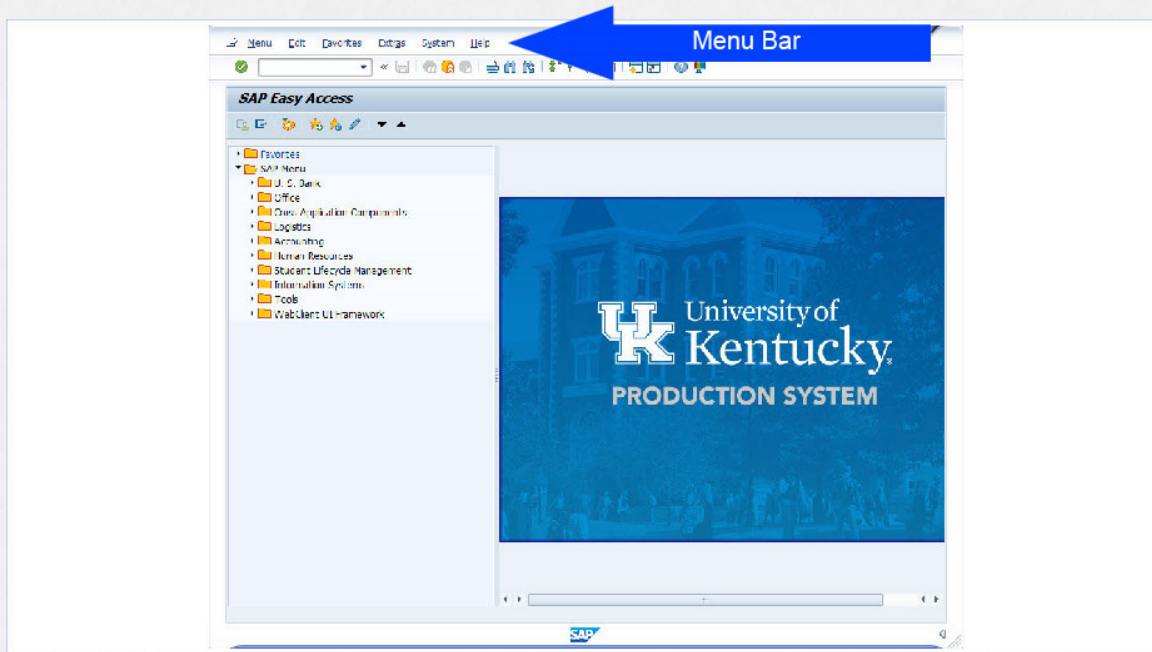
The “home” screen of the IRIS Production System is the **SAP Easy Access** screen.

The following slides in this unit will provide a navigational overview of the main elements of this screen.

- Take special note of the name of the various elements, as these will be referenced in many of the other IRIS training courses.

Slide 45 - Slide 45

Screen Element: Menu Bar



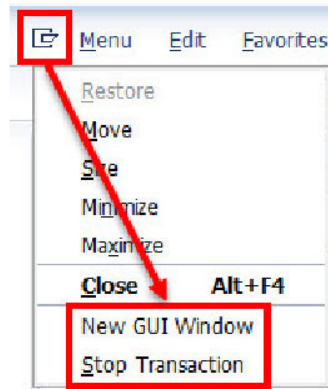
Slide 46 - Slide 46

Menu Bar

The **Menu Bar** will contain different menu options for each transaction.

Click on the **Window Control** icon to:

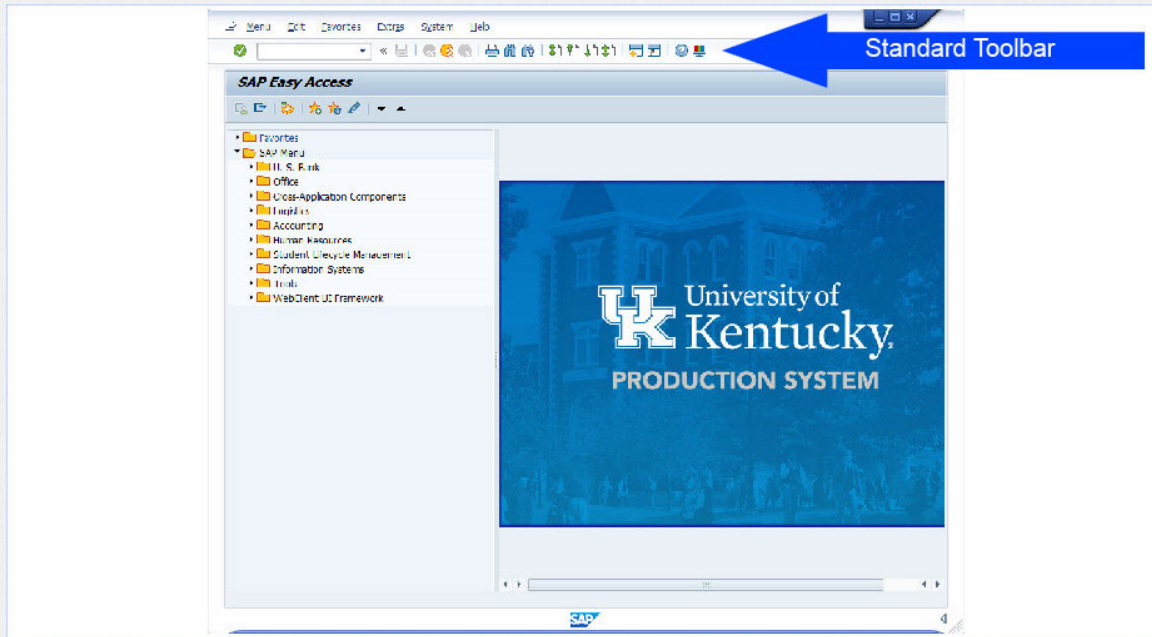
- Open additional SAPGUI windows ("sessions")
 - Maximum of six (6) open simultaneously
 - Can be in the same or different transactions



- Stop a transaction from processing (i.e. running a big report that may be taking a long time to execute/process)

Slide 47 - Slide 47

Screen Element: Standard Toolbar



Slide 48 - Slide 48

Standard Toolbar

All items in the **Standard Toolbar** will remain in place and unchanged, as they are “standard” functions for all transactions.

Command Field: Used to access a transaction   

- A transaction is an executable business process, for example:
 - Adding a new hire
 - Displaying an Organizational Unit's budget for reconciliation
 - Maintaining a student's financial records
 - Creating a job order for Physical Plant to fix a door handle
- Each transaction has a transaction code (“t-code”) and a title, for example:
 - Adding a new hire = PA40 Personnel Actions

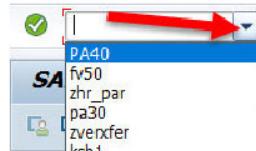
Standard Toolbar (Continued)

Command Field (Continued):

- Methods for entering a transaction in the Command Field:
 - Manually enter a t-code and either click on the green circular **Enter** icon (on left side) or press the **Enter** key; or



- Click on the down-arrow on the right side to see last few transactions manually entered in the Command Field, and then click on desired transaction in the drop-down list, if seen.



- Clicking on the arrow icon to the right of the Command Field hides/shows the field. We recommend leaving the field visible.



Slide 50 - Slide 50

Standard Toolbar (Continued)



Save icon (1): Used to save entered data

Back icon (2): Used to return to the previous screen (The *SAP Easy Access* screen is as far back as you can go.)

Exit/Log off icon (3): Used to completely close a transaction and return to the *SAP Easy Access* screen; On the *SAP Easy Access* screen, it can be used to close the SAP window/session.

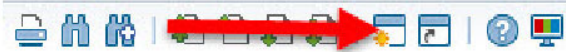
Cancel icon (4): Used to cancel any data entered in a transaction and not save

Print icon (5): Used to print the current screen

Slide 51 - Slide 51

Standard Toolbar (Continued)

New GUI Window icon: Another method for opening additional SAPGUI windows ("sessions")

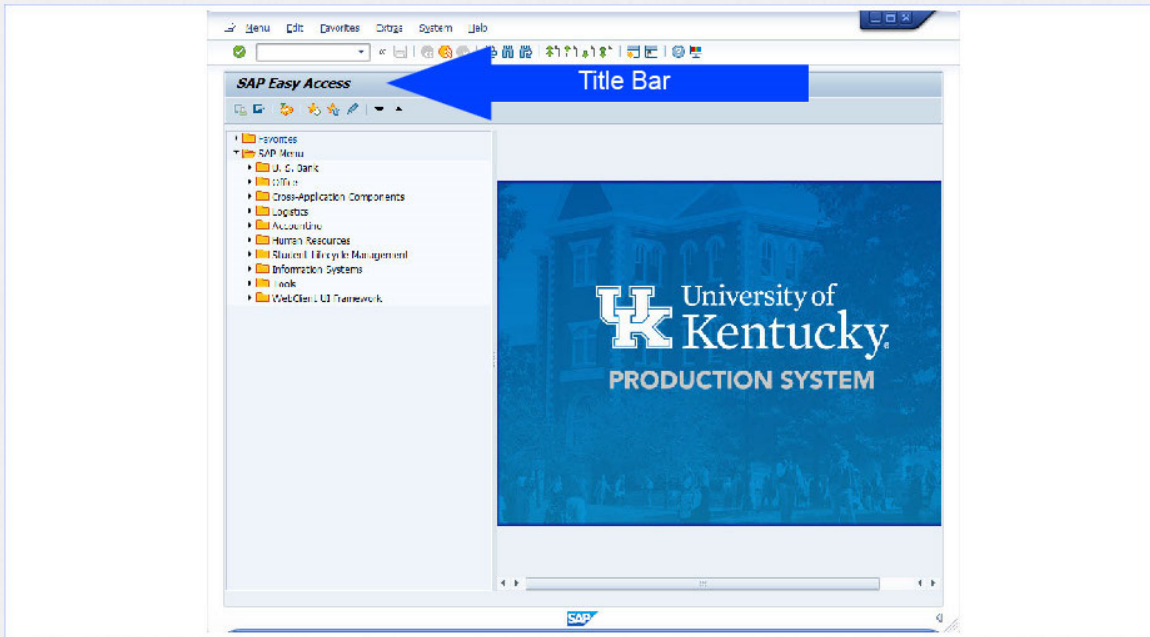


The other icons in the Standard Toolbar will not be used near as often as the ones already explained.

If an icon is grayed out, it is not an active function for the current screen.

Slide 52 - Slide 52

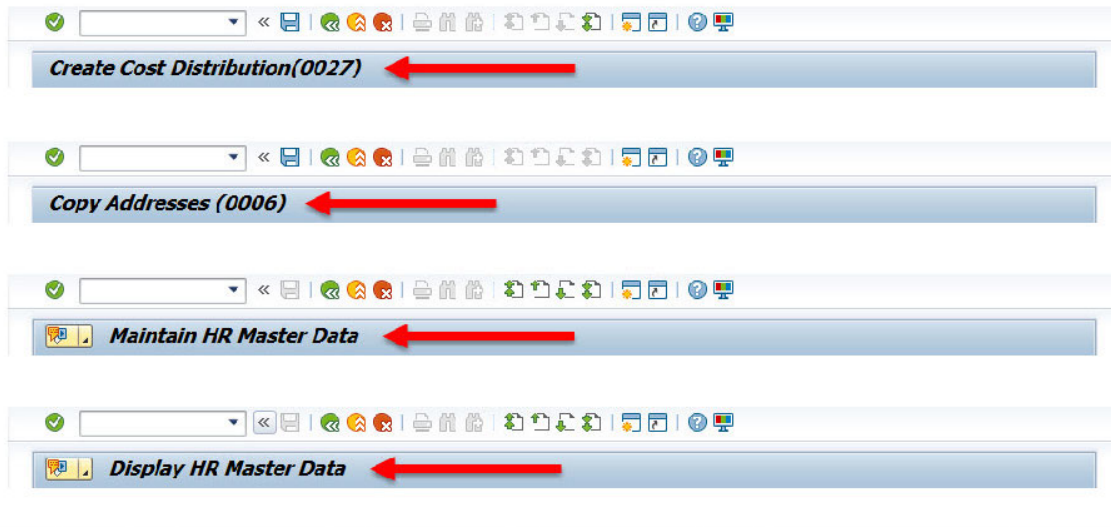
Screen Element: Title Bar



Slide 53 - Slide 53

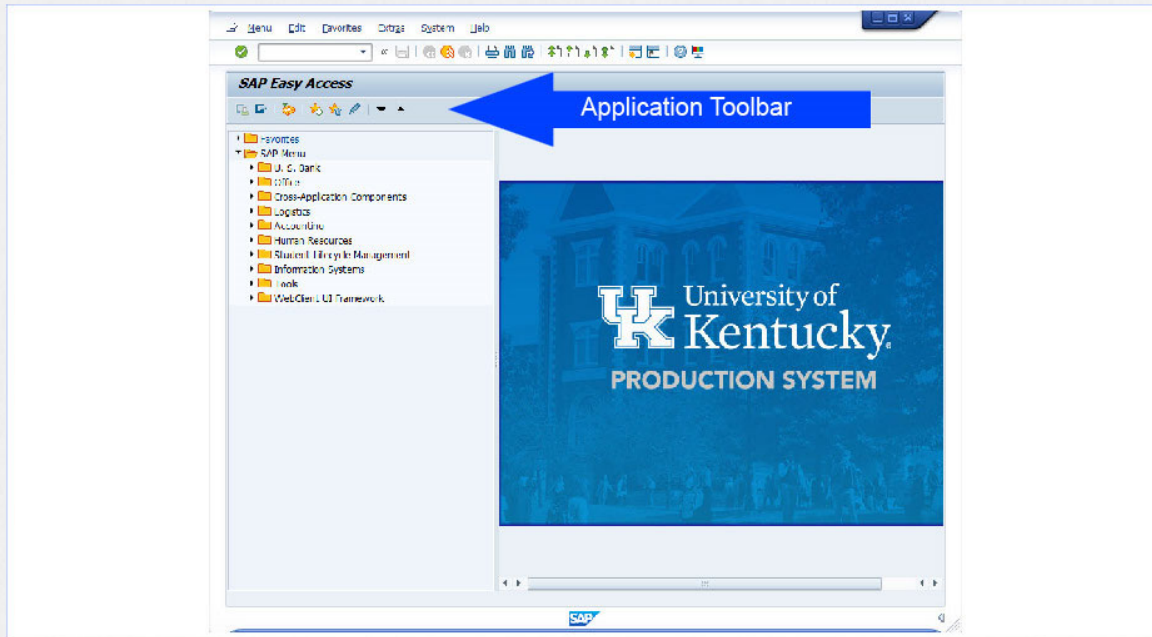
Title Bar

The **Title Bar** lists the title of the current transaction, which can include the current mode (i.e. Create, Copy, Maintain, Display).



Slide 54 - Slide 54

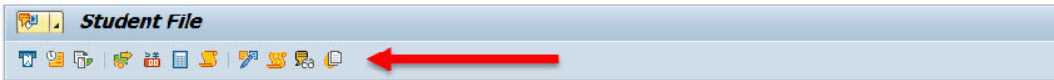
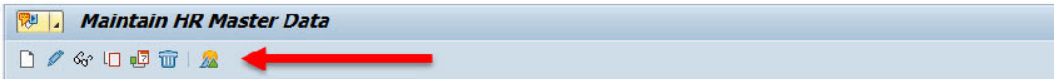
Screen Element: Application Toolbar



Slide 55 - Slide 55

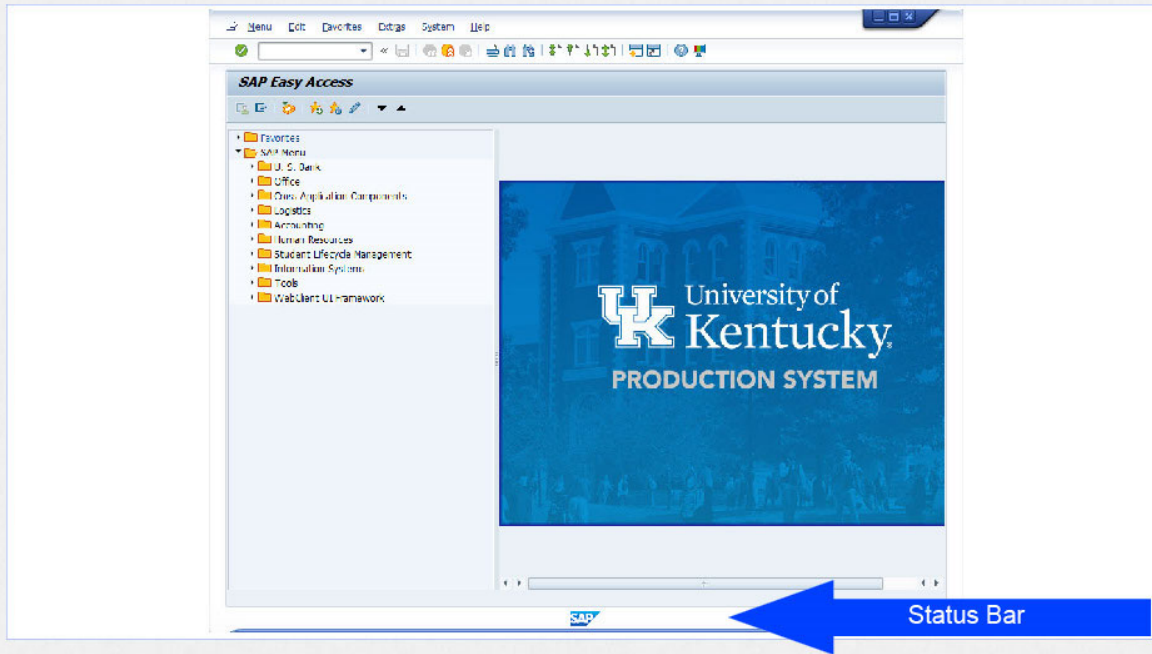
Application Toolbar

The icons/buttons in the **Application Toolbar** will change, as they are functions specific to the current transaction ("application").



Slide 56 - Slide 56

Screen Element: Status Bar

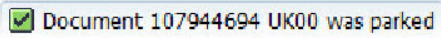
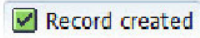


Slide 57 - Slide 57

Status Bar - Left Side

The left side of the **Status Bar** contains three types of important system messages.


- **Informational:** indicates successful processing

A rectangular status bar message with a green checkmark icon on the left and the text "Document 107944694 UK00 was parked" to its right.A rectangular status bar message with a green checkmark icon on the left and the text "Record created" to its right.

Slide 58 - Slide 58

Status Bar - Left Side (Continued)

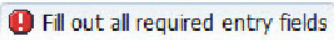
- **Warning:** provides information and/or prompts a user to stop and check certain data before proceeding (an “FYI”); does not mean something is wrong; press the **Enter** key to acknowledge and continue

 Attendance/absence 04/19/2020 - 04/19/2020 during non-working period (att./abs.type 1005)

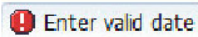
Slide 59 - Slide 59

Status Bar - Left Side (Continued)

- **Error:** indicates an issue that must be addressed before the system will allow the user to continue

An error message box with a red exclamation mark icon and the text "Fill out all required entry fields".

! Fill out all required entry fields

An error message box with a red exclamation mark icon and the text "Enter valid date".

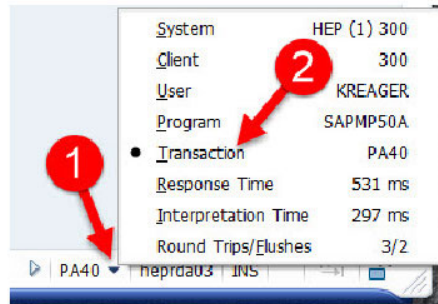
! Enter valid date

Slide 60 - Slide 60

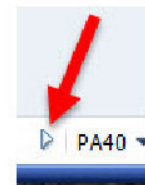
Status Bar - Right Side

The right side of the **Status Bar** displays technical system information.

- Click on the drop-down arrow to obtain a menu of items to display (1)
- Select **Transaction** (2) to display the current screen's t-code for easy reference (PA40 in this example):

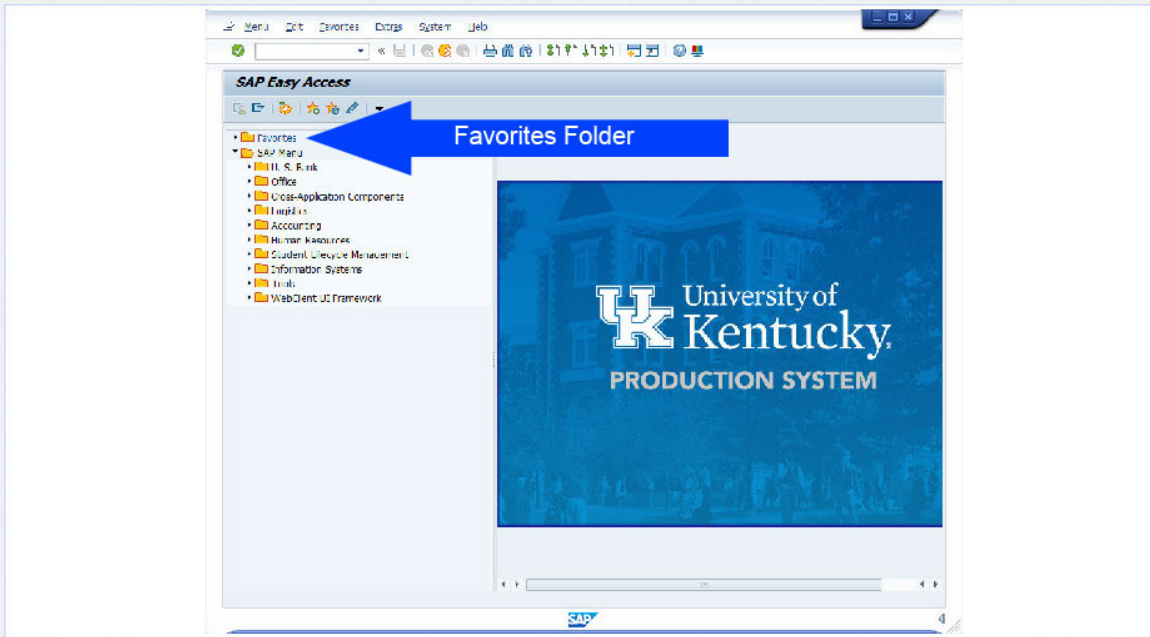


- Click on the triangle on the left end to hide/show this information



Slide 61 - Slide 61

Screen Element: Favorites Folder



Slide 62 - Slide 62

Favorites Folder

The **Favorites** folder can contain shortcuts to frequently used transactions, making it another method for accessing transactions besides the Command Field.

Everything is created and organized by the user.

Favorites are stored with the user's profile, thus making them available wherever the user signs into SAP.

Favorites created in the IRIS Production System will not automatically copy into the IRIS Training System, and vice versa.



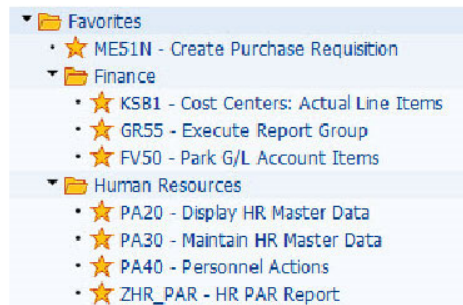
Favorites Folder (Continued)

The Favorites Folder can contain:

- individual transaction shortcuts; and/or



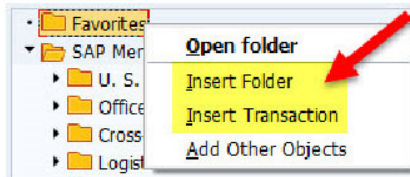
- one or more sub-folders, each containing related transaction shortcuts.



Slide 64 - Slide 64

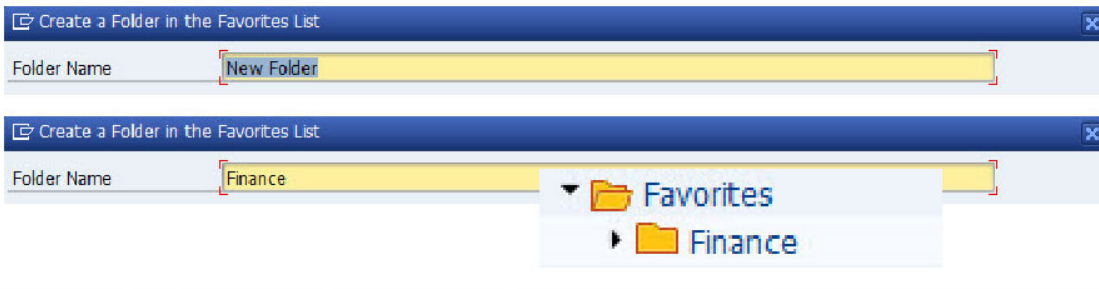
Favorites Folder (Continued)

The easiest way to add favorites is to right-click on the **Favorites** folder and select the desired option.



Insert Folder:

- Replace the **New Folder** text in the **Folder Name** field with the desired name, and press **Enter**

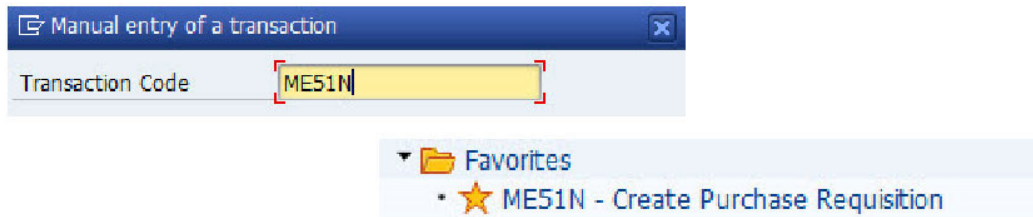


Slide 65 - Slide 65

Favorites Folder (Continued)

Insert Transaction:

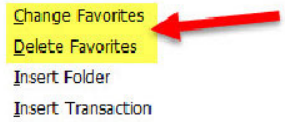
- Before selecting **Insert Transaction**, be sure you have right-clicked on the desired folder in which you want the favorite located (**Favorites** folder to add directly, or a sub-folder to add to the sub-folder)
- Enter the t-code into the **Transaction Code** field, and then press **Enter**



Slide 66 - Slide 66

Favorites Folder (Continued)

Once inserted, a favorite can be changed (renamed) or deleted by right-clicking and selecting the corresponding menu option.



Change Favorites:

- Enter desired name in the Text field, and press Enter

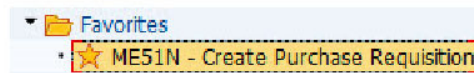
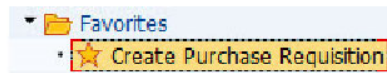


Slide 67 - Slide 67

Favorites Folder (Continued)

If you do not see the actual t-code listed for a transaction shortcut, do the following:

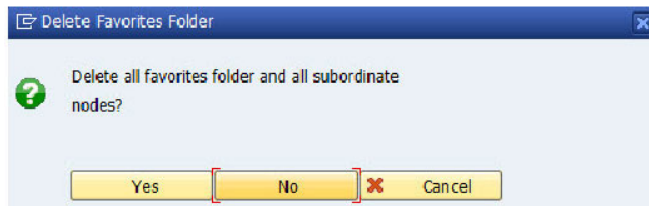
- Select **Extras** then **Settings** in the Menu Bar
- In the **Settings** pop-up window, select **Display Technical Names** and then press **Enter**



Favorites Folder (Continued)

Delete Favorites:

- Right-click directly on the favorite to delete; you are deleting only the shortcut, not the actual transaction in the system
- For folders, if favorites exist in the folder, a system message will appear before deleting; selecting **Yes** will delete the folder and all favorites in the folder!

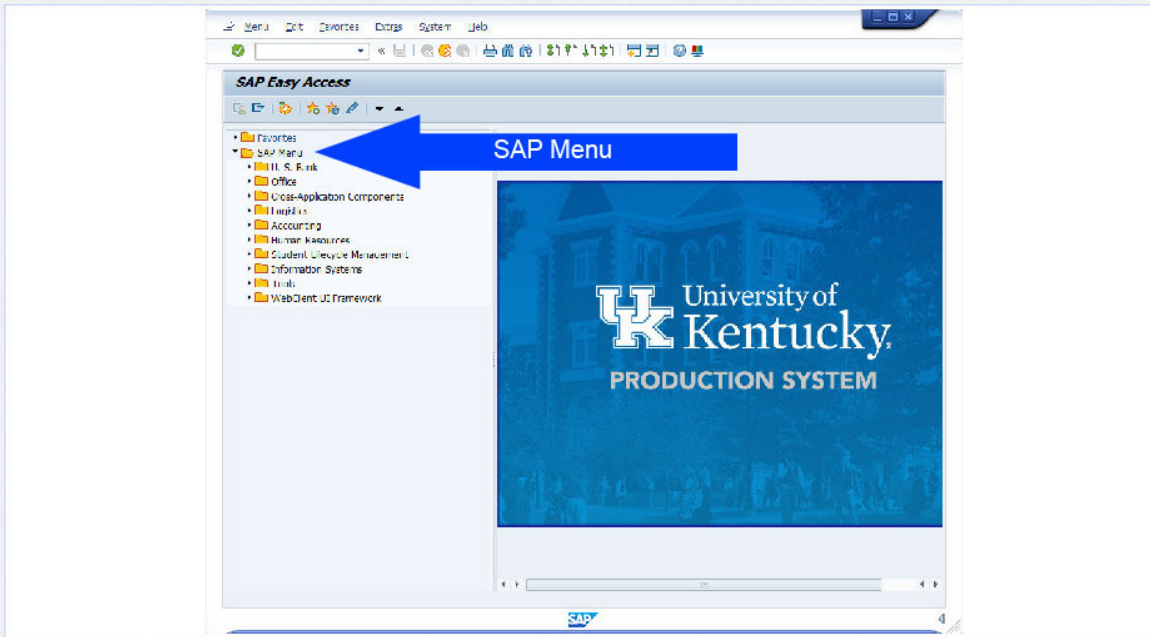


Favorites can be re-inserted if necessary.

To rearrange the order of favorites, left-click on the favorite (to select), and then drag-and-drop it to the desired location.

Slide 69 - Slide 69

Screen Element: SAP Menu



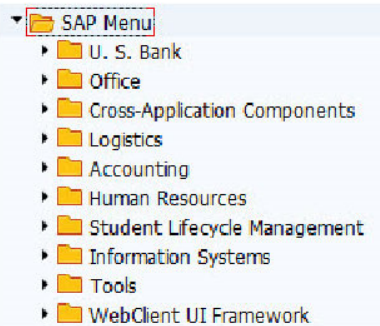
Slide 70 - Slide 70

SAP Menu

The **SAP Menu** folder contains sub-folders with all of the numerous SAP transactions.

This is the “root” location for the transactions.

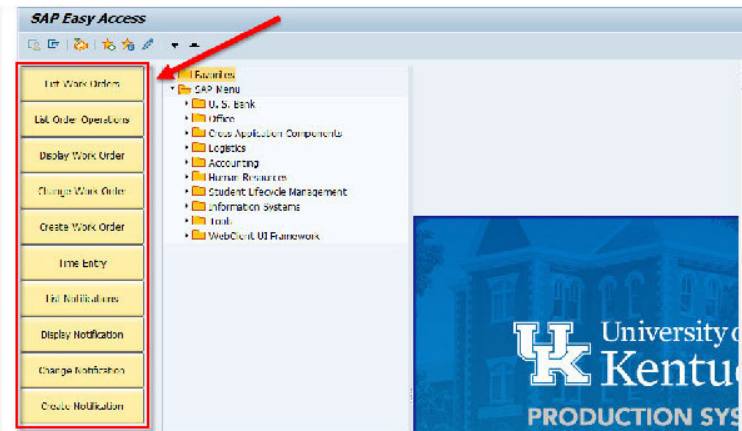
Best way to access the transaction(s) you need is either by entering the t-code in the **Command Field** and pressing **Enter**, or by double-clicking on the transaction shortcut you may have inserted in your **Favorites** folder.



Slide 71 - Slide 71

Screen Element: GuiXT Buttons

For Plant Maintenance (PM) users, the **GuiXT buttons** located on the left side of the *SAP Easy Access* screen are shortcuts to frequently used PM transactions*.



*Users must contact their departmental PM Power User for assistance in installing and activating the **GuiXT** software.

Slide 72 - Slide 72

Other Screen Elements

The remaining slides in this unit will cover a few standard screen elements seen and/or used within the transactions in the Production System.

The screen elements covered are:

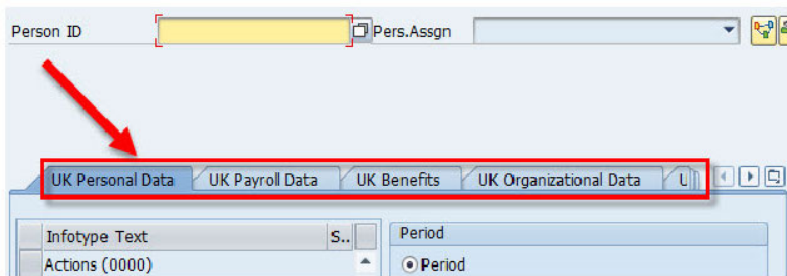
- Tabs
- Input Field
- Required Field Indicator
- Drop-Down Menu Icon
- Possible Entries Icon
- Selection Options

Slide 73 - Slide 73

Screen Element: Tabs

Tabs seen on a transaction screen indicate individual screens that contain related data grouped together.

Click on a tab to display that screen's information.



The first two icons on the right side of tabs can be used to scroll left/right through the tabs.

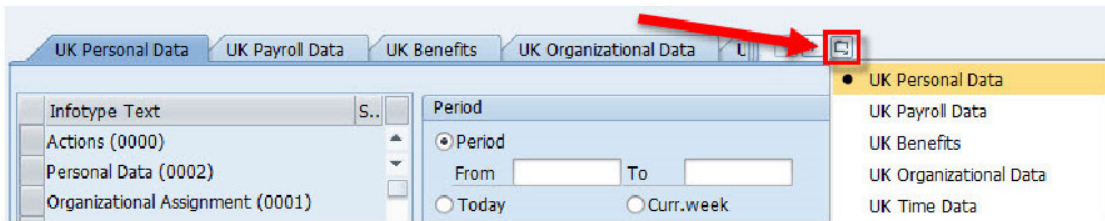


Slide 74 - Slide 74

Tabs (Continued)

The third (**Tab List**) icon will display a drop-down menu containing the names on each tab in order as seen from left to right.

Click on the desired tab's name to select.

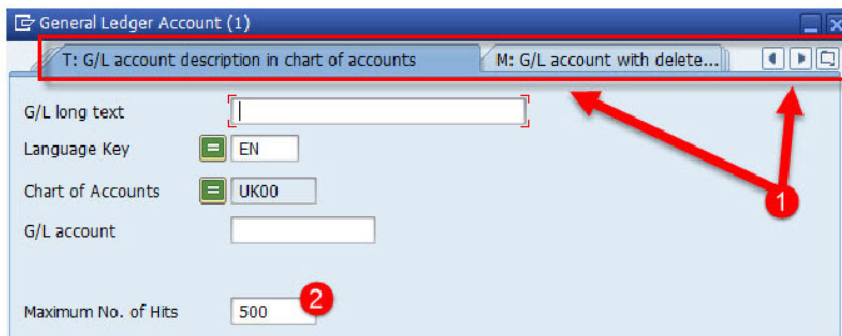


Slide 75 - Slide 75

Tabs (Continued)

Tabs and the three icons can also be seen and used in search windows (1).

Each screen contains fields in which search criteria can be entered; Enter the appropriate search criteria and press **Enter** to retrieve the results window.

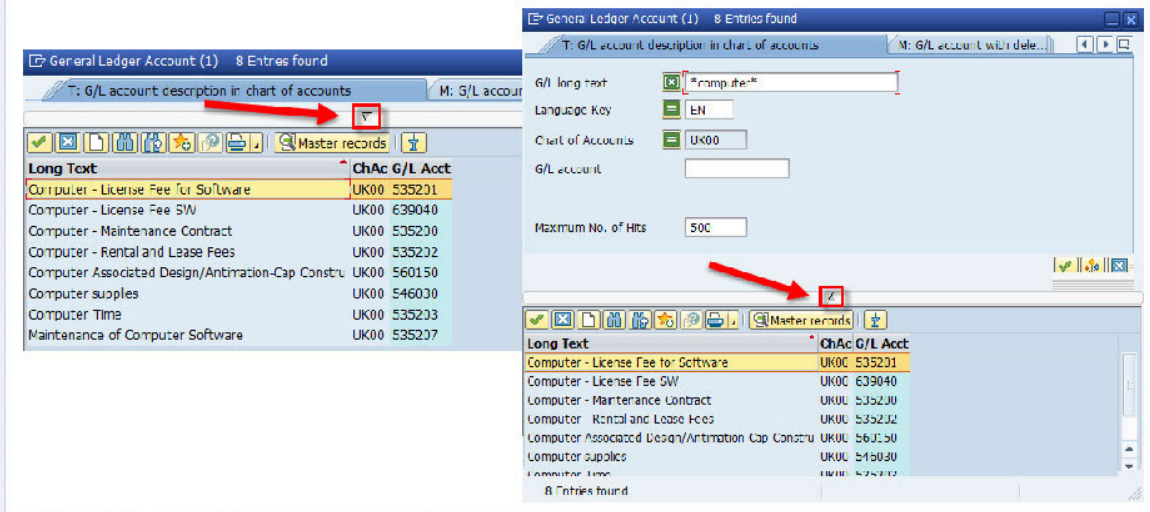


The **Maximum No. of Hits** field value (2) determines the number of results displayed; The default is usually 500, but can be increased to any number in order to yield more results.

Slide 76 - Slide 76

Tabs (Continued)

Once search results are displayed, the **Show/Hide** icon in the middle of the screen under the tabs can be used to open/close the search window again, should the search criteria need to be revised to obtain different results.



Slide 77 - Slide 77

Screen Element: Input Field

Data can be entered in any white (yellow when selected) **Input Field**.

Input fields can contain free form text (1). The **Longer Text** icon (2) can be used to enter more text than what will fit in the free form field.

Input fields with the **Possible Entries** (search) icon (3) must contain a pre-established, system value.

Grayed out fields (4) are display only.

The screenshot displays a software interface with several input fields. Red arrows and numbers (1-4) point to specific features:

- 1**: Points to a text input field containing "OSNO".
- 2**: Points to a "Longer Text" icon (a document with a pencil) next to the "OSNO" field.
- 3**: Points to a "Possible Entries" icon (a magnifying glass) next to a dropdown menu containing "LX-0220-02-240".
- 4**: Points to a grayed-out input field containing "12537170".

The interface also shows a "Reference object" section with fields for "Functional loc.", "Equipment", and "Assembly". The "Functional loc." field is currently selected and highlighted in yellow.

Slide 78 - Slide 78

Screen Element: Required Field Indicator

Any input field containing a checked box indicates it is a required field.

The screenshot shows two sections of a form. The first section, titled 'Period', contains a 'Reporting Period' dropdown menu with 'K Key Date' selected, and a small white box with a checked checkbox icon to its right. A red arrow points from the text above to this checkbox. The second section, titled 'Selection Criteria', contains a 'Personnel Number' text input field with a small white box and a checked checkbox icon to its right. A red arrow points from the text above to this checkbox.

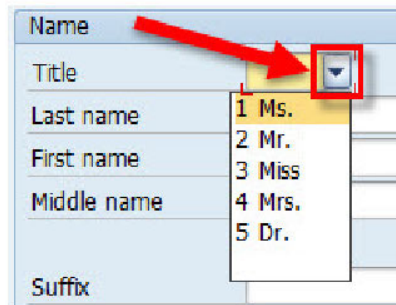
An error message will appear in the Status Bar, if a user tries to proceed without completing the field.



Slide 79 - Slide 79

Screen Element: Drop-Down Menu Icon

The **Drop-Down Menu Icon** in an input field can be clicked on to display a list of available values.



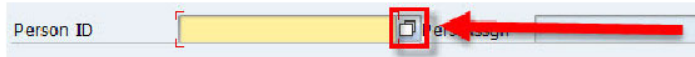
Only a value from within the drop-down menu is accepted.

Click on the desired value to select.

Slide 80 - Possible Entries icon

Screen Element: Possible Entries Icon

Input fields with the **Possible Entries** icon must contain only a value that is already pre-established in the system.



The icon appears only when your cursor is in the field.

If the field value is known, it can be entered manually.

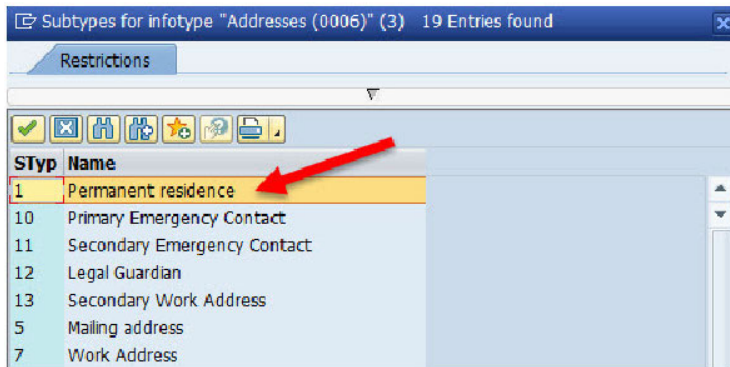
If the field value is unknown, click on the **Possible Entries** icon (or press the **F4** key on your keyboard) to initiate a search.



Slide 81 - Slide 81

Possible Entries Icon (Continued)

For some input fields, the list of possible values will display immediately.



Double-click on the desired value to auto-populate the input field, or use the up/down arrows on your keyboard until the desired value is highlighted, and then press **Enter**.

Possible Entries Icon (Continued)

Some input fields will first display a search window so various criteria can be entered in order to narrow down the displayed results.

A wildcard search uses the asterisk (*) in place of any string of characters.

- In this example, we are searching for all G/L Accounts that have the word 'print' in their name:

The screenshot shows a search window for 'General Ledger Account (3)'. The search criteria are: 'G/L long text' set to '*print*', 'Language Key' set to 'EN', and 'Chart of Accounts' set to 'UK00'. The results table is as follows:

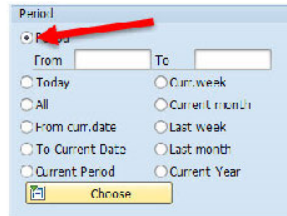
Long Text	ChAc	G/L Acct
COP Poster Printer Service	UK00	639055
Industrial and Print Shop Supplies	UK00	540326
Network Printers	UK00	550014
Printed Forms	UK00	639053
Printed Forms from External Vendor	UK00	531203
Printer Cartridges	UK00	546180
Printing from External Vendor	UK00	531201
Printing Supplies	UK00	540337
Printing: Managed Print Services	UK00	531205
University Press Print and Bind	UK00	532027

Slide 83 - Slide 83

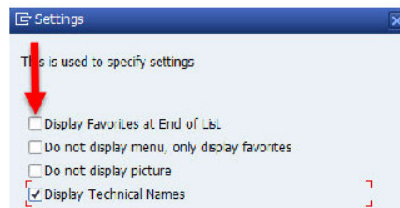
Screen Element: Selection Options

Radio buttons and checkboxes are used to choose various selection options.

To change radio button selections, click on another radio button. The current selection will contain a black circle inside.



Multiple clicks in a checkbox will toggle the checkmark on and off.



Slide 94 - Slide 94

Unit 4: Global Concepts



Slide 95 - Slide 95

Unit Content

This unit will cover some additional, global functions and concepts within the IRIS Production System.

Topics covered:

- Changing Transactions
- Additional IRIS Sessions
- Field-Level Help: F1 Key
- Master Data

Changing Transactions

To go from one transaction to another in the IRIS Production System, there are a couple different options available.

Option 1

1. Click on the **Back** icon in the Standard Toolbar until you reach the **SAP Easy Access** screen
2. Enter the second transaction's t-code in the **Command Field** and press **Enter** (1), or double-click on the transaction if it is already a shortcut in your **Favorites** folder (2)

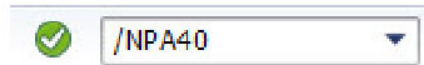


Slide 97 - Slide 97

Changing Transactions (Continued)

Option 2

1. Still in the first transaction, click in the **Command Field**, enter the second transaction's t-code **preceded by '/N'** (for **New**), and press **Enter**



- There is no space in-between the '/N' and the t-code.
- The '/N' is not needed to change transactions if you are on the **SAP Easy Access** screen.

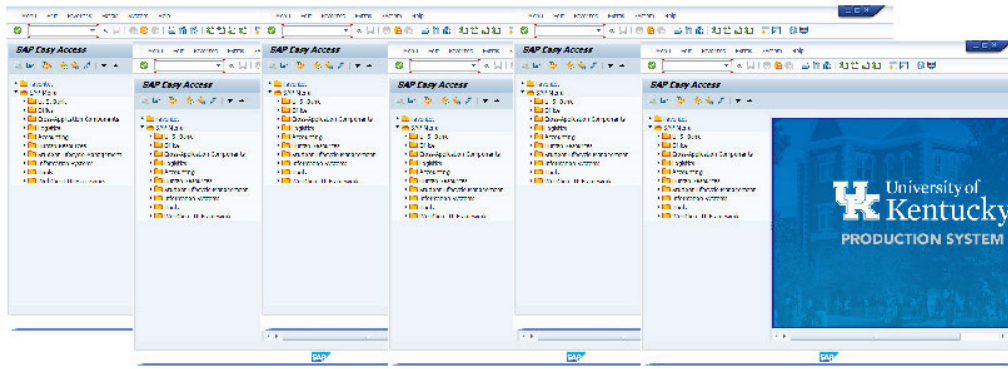
Slide 98 - Slide 98

Additional IRIS Sessions

Up to six (6) IRIS Production System sessions (windows) can be open simultaneously to assist in reviewing and/or processing transactions.

The sessions can all be open to the same transaction, or they can all be in different transactions...whatever the need might be.

Use the **Alt** and **Tab** keys on your keyboard to toggle between the sessions.

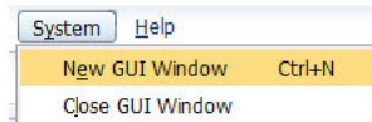


Slide 99 - Slide 99

Opening Additional Sessions

Use any of the following methods to open additional sessions:

- Select **System** --> **New GUI Window** from the Menu Bar



- Press the **Ctrl** and **N** keys



- Click on the **New GUI Window** icon on the right end of the Standard Toolbar

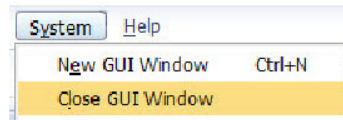


Slide 100 - Slide 100

Closing Additional IRIS Sessions

Use any of the following methods to close additional sessions:

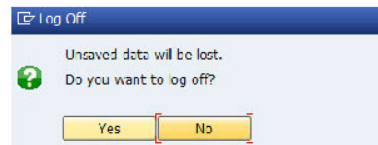
Select **System --> Close GUI Window** from the Menu Bar



Click on the Close (x) button in the upper-right corner of the session



NOTE: Be sure any unsaved data is either saved or the transaction is canceled prior to closing a session. The system may not prompt you to save if unsaved data exists, unless you are closing the last open session.



Slide 101 - Slide 101

Field-Level Help: F1 Key

Clicking in most any input field and pressing the F1 key on your keyboard will open a pop-up window displaying SAP-delivered information regarding the title, purpose and/or description of the field.

This should work whether the field is open for editing or grayed-out (read-only).

The screenshot displays the SAP 'Display Preventive Maintenance 807002949316: Central Header' window. Two red boxes highlight the 'Order' field (containing '807002949316') and the 'Description' field (containing 'WATER FOUNTAIN 5305'). Red arrows point from these fields to two 'Performance Assistant' pop-up windows. The left window, titled 'Order Number', provides the description: 'Number which identifies an order within a client.' The right window, titled 'Description', provides the description: 'Short description of the order (language-independent). You can enter longer language-dependent texts, using the "Long text" function.'

Slide 102 - Slide 102

Master Data

Within the Production System, master data is:

- Key “master” information on students, employees, cost objects, facilities, equipment, etc.;
- Entered and maintained at different levels by those responsible and presented in display mode for users based on their security access;
- Typically remains unchanged over an extended period of time;
- Contains information that is always used in the same way;
- Can be used across SAP modules and core applications; and
- Reduces data redundancy and data input.

Slide 103 - Slide 103

HR Master Data Example

Transaction PA20 contains all the master data for employees.

The screenshot displays the SAP 'Display HR Master Data' window. At the top, the title bar reads 'Display HR Master Data'. Below the title bar, there are several input fields: 'Person ID' (0000766), 'Pers. Assign' (00000245 51128809 00000245), 'Name' (Jeremy T. Smith), 'EmpL %' (100.00), 'FF group' (A Staff), 'Pers. area' (1000 Main Campus), 'EE subgroup' (05 Non-Exempt 4..), and 'Pers. subarea' (0001 Reg FT). Below these fields are tabs for 'UK Personal Data', 'UK Payroll Data', 'UK Benefits', and 'UK Organizational Data'. The 'UK Personal Data' tab is active, showing a list of data categories on the left and a 'Period' selection area on the right. The list includes: 'Infotype Text', 'Actions (0000)', 'Personal Data (0002)', 'Organizational Assignment (0001)', 'Addresses (0005)', 'Basic Pay (0008)', 'Cost Distribution (0027)', 'Date Specifications (0041)', 'Additional Personal Data (0077)', and 'College/Department Comments (9022)'. Each item has a green checkmark. The 'Period' section has radio buttons for 'Period', 'From', 'To', 'All', 'From curr. date', 'To Current Date', 'Current Period', 'Curr. week', 'Current month', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is located below the radio buttons. At the bottom, there is a 'Direct selection' section with an 'Infotype' field and a 'SY' field.

Slide 104 - Slide 104

FI Master Data Example

Transaction KS03 contains all of the master data associated with a Cost Center (account number).

The screenshot displays the 'Display Cost Center: Basic Screen' in SAP. It includes a 'Drilldown' icon and the following fields:

- Cost Center: 10012062470 MCTS COMPUTER SYS
- Controlling Area: 0800 University of Kentucky
- Valid From: 01/01/1900 to 12/31/9999

Navigation tabs include: Basic data, Control, Employees, Address, Communication, History.

Names

- Name: MCTS COMPUTER SYS
- Description: MCTS COMPUTER SYS

Basic data

- User Responsible: [Empty]
- Person Responsible: CINA LYSELL
- Department: 3F220
- Cost Center Category: 4 UK Cost Center
- Hierarchy Area: A3F220 Univ Computing Enterprise Systems
- Company Code: 0800 University of Kentucky
- Business Area: 0101 UK w/o component units
- Functional Area: [Empty]
- Currency: USD
- Profit Center: [Empty]

Slide 105 - PIQST00 screen shot

SLCM Master Data Example

Transaction PIQST00 contains all of the information for a UK student.

Student File

Student Number: 10037714

Name: Pitt, Derk; *04/15/1987; Male (He); LNHAM12

Principal Org. Unit: College Of Engineering

Status: Student; Athlete; Honors; ROTC; Resident

Selection Criteria

Key Date: 08/05/2020

Period: From 08/05/2020 to 12/31/9999

Hold Type	Status	Hold Grouping	Start Date	End Date	Object Description
Advisor Hold	◆	Academic	04/26/2006	12/31/9999	Pitt, Derk
Young Library Hold	■	Financial	07/23/2009	12/31/9999	Pitt, Derk
Parking Citation Hold	◆	Financial	01/29/2007	12/31/9999	Pitt, Derk

Slide 106 - Slide 106

PM Master Data Example

Transaction IE03 contains technical information on equipment.

Display Equipment : General Data

Class overview Measuring points/counters

Equipment: M-1389 Category: M Machines

Description: ICE CREAM MACHINE Intern.n...

Status: INST

Valid From: 02/19/2007 Valid To: 12/31/9999

General Location Organization Structure Other

General data

Class: PM_MEDCTR_ALL Medical Center Equipment

Object type: 110DE

AuthorizGroup: MPPD Medical Center PPD

Weight: 0.000 Size/dimension

Inventory no.: 474653 Start-up date

Reference data

AcquistnValue: 0.00 Acquisition date

Manufacturer data

Manufacturer: TAYLOR ManufCountry:

Model number: 150 L2 Consructr/mfctn: /

Manufpartno.:

ManufScribNo.: B0293732

Customer warranty

Warranty start: Warranty end:

Master warranty: InheritWarranty Pass on warranty

Vendor/manufacturer warranty

Warranty Start: Warranty end:

Master warranty: InheritWarranty Pass on warranty

Slide 113 - Slide 113

Unit 5: IRIS Training



Slide 114 - Slide 114

IRIS Training Plan

A user's IRIS training is based on their **IRIS Training Plan**, which is an e-mail document that indicates the SAP/IRIS access and associated training course(s) required for their current job responsibilities.

A training plan is valid for as long as a user is in the position indicated in the plan.

Any access changes needed while a user is in the same position are also made by the submission of a training plan.

If a user changes positions and needs SAP/IRIS access in their new assignment, a new training plan must be submitted, even if some/all of the access is the same as in the previous position.

Slide 115 - Slide 115

Sample IRIS Training Plan

Start/Effective_Date = 05/01/2020
 Reason_for_Plan_____ = Brand New Employee
 Requester's_Name = John Smith
 Requester's_Email = john.smith@uky.edu
 Employee's_Name_ = Jane Miller
 Employee's_Email = jane.miller@uky.edu
 User_ID_____ = jem229
 Person_ID_____ = 12345678
 Personnel_Number = 23456789
 Position_Number_ = 51001000
 Position_Title_ = Administrative Staff Officer II
 Department_____ = 10000

← General Employee/Assignment Information

← Required Access/Training Courses

SOR_____ = Yes (Statement of Responsibility)
 UK_100_____ = Yes (IRIS Awareness & Navigation)

 BEX_300_____ = Yes (BEx Web Reporting) (You must also complete BEX_300_A BEx Web Reporting Assessment)

 FI_200_____ = Yes (Finance Overview)
 FI_CT_300_____ = Yes (Cash Transmittals)
 FI_GU_310_____ = Yes (G/L Account Documents (JVs))
 FI_GU_321_____ = Yes (Statistical Internal Orders) (You must also complete FI_GU_322 User Codes & SIO/UC Reporting)
 FI_PC_300_____ = Yes (Procard Editing)

Slide 116 - Slide 116

Training Plan Process

The IRIS Training Plan process is as follows:

STEP 1: The training plan is completed on a website form by the user's business officer, immediate supervisor or designated contact person (**not by the user!**) and submitted (e-mailed) to the appropriate Approver/Area Security Officer (ASO).



Slide 117 - Slide 117

Training Plan Process (Continued)

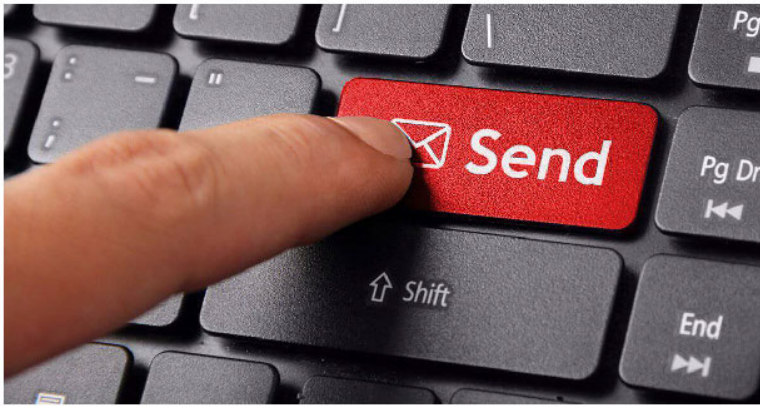
STEP 2: The Approver/ASO will review the training plan and forward it to EA Training upon their approval.



Slide 118 - Slide 118

Training Plan Process (Continued)

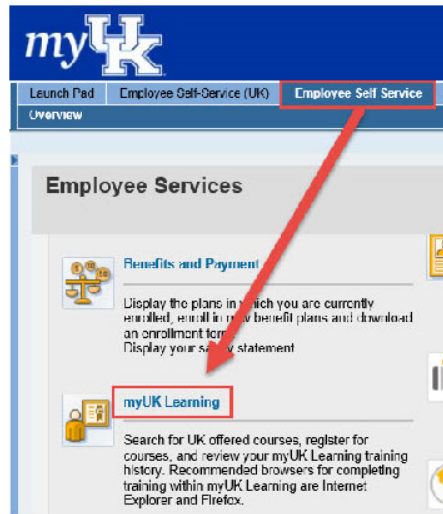
STEP 3: EA Training will perform an audit of the user's training records and current SAP/IRIS access and forward the training plan to the user with further information and instructions.



Slide 119 - Slide 119

Training Plan Process (Continued)

STEP 4: The user will complete any required training courses in myUK Learning, accessed via the link on the myUK Employee Self Service screen.



Slide 120 - Slide 120

Training Plan Process (Continued)

Once a course (or series of courses in some cases) is successfully completed, the associated access should be available to the user **within 1-2 business days**; access is not immediate.



There is no need for a user to notify EA Training of the completion. We run a report daily that lists completed courses and provision the access accordingly.

Slide 121 - Slide 121

IRIS Training Delivery Formats

IRIS courses are delivered in one of two formats:

Web-Based Training (WBT)

- On-line only in myUK Learning
- Can be taken at any time convenient to the user



Slide 122 - Slide 122

IRIS Training Delivery Formats (Continued)

Classroom

- Instructor-Led in a campus computer lab (McVey Hall, Rooms 203 & 204)
- Scheduled on a set day with a specific start time, duration and location
- Registration is required in myUK Learning in order to attend a class



IRIS Training Curriculum

IRIS courses are divided into three levels and must be completed in numerical order: Level 100 --> Level 200 --> Level 300.

LEVEL 100

- Introductory course focused on general system information and basic navigational functions
- UK_100 IRIS Awareness & Navigation

LEVEL 200

- Overview courses focused on the processes and functionality of the different IRIS modules
- Examples: FI_200 Finance Overview, HR_200 Human Resources Overview

LEVEL 300

- Role-Based courses providing step-by-step instructions for transactions
- Examples: FI_CT_300 Cash Transmittals, SLCM_AD_310 Student Records

IRIS Course Code & Title

Every IRIS training course has a code and a title. For example:

- **UK_100** is the code, and **IRIS Awareness & Navigation** is the title.

The number seen in the course codes indicates the level. For example:

- UK_100 is a Level 100 course.
- FI_200 is a level 200 course.
- HR_PA_300 is a level 300 course.

Some IRIS access is obtained after completing multiple courses, and these courses must be completed in numerical order as well. For example:

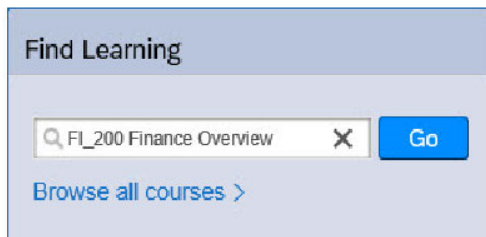
- SRM Shoppers access requires SRM_SHO_301 --> SRM_SHO_302 --> SRM_SHO_303 --> SRM_SHO_304

Slide 125 - Slide 125

Locating IRIS Courses

A user's required IRIS training courses will **not** automatically appear in the **My Learning Assignments** tile on their myUK Learning Home page.

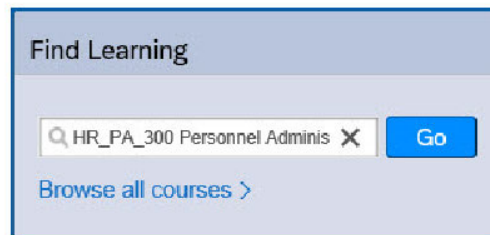
The search box in the **Find Learning** tile must be used to locate a course by either the course code (i.e. FI_200, HR_PA_300) and/or the course title (i.e. Finance Overview, Personnel Administration).



Find Learning

FI_200 Finance Overview X Go

[Browse all courses >](#)



Find Learning

HR_PA_300 Personnel Adminis X Go

[Browse all courses >](#)

Slide 126 - Slide 126

myUK Learning Help

Tutorials and FAQs for myUK Learning are available on HR's website, <https://www.uky.edu/hr/training/myuk-learning/get-to-know-myuk-learning>.



[About HR](#) [Benefits](#) [Compensation](#) [Employee Relations](#) [Employment](#) [Records](#) [Training](#) [Wellness](#) [Worklife](#)

Get to know myUK Learning

[Home](#) / [Training](#) / [myUK Learning](#) / [Get to know myUK Learning](#)

Below you will find several helpful tutorials on how to use myUK Learning. You can also visit our [AOL page](#).

- > [myUK Learning](#)
- > [Campus: Request transcript](#)
- > [UK HealthCore: Request transcript](#)

Tutorials

Here you'll find printable tutorials to help become familiar with the new learning system. First, you'll find a general overview for all users. And also tutorials grouped by staff or supervisor for your specific needs.

Overview



[Overview and Navigation of myUK Learning](#)

C&FF

Slide 133 - Slide 133

Unit 6: IRIS Support Resources



Slide 134 - Slide 134

IRIS Training & Access Support

All IRIS **training** and **access** questions/issues should be e-mailed to:

IRISsupport@uky.edu

Please include all applicable details and screen shots in your e-mail.



Slide 135 - Slide 135

IRIS myHelp Website

The **IRIS myHelp** website (<http://myhelp.uky.edu/rwd/HTML/index.html>) contains the following:

- Quick Reference Cards (QRCs) - documents that provide specific step-by-step instructions for executing many of the most frequently used transactions.
- Printable version of each IRIS course
- General IRIS training/access information



Slide 136 - Slide 136

ITS Customer Services

If you require **technical** assistance with IRIS, contact ITS Customer Services:

- **(859) 218-HELP (4357)**
- **218HELP@uky.edu**



- Technology Help Center: <https://uky.service-now.com/techhelp>