



# IRIS Awareness and Navigation

UK\_100



## Course Content



- Introduction
- Unit 1 – *SAP Easy Access* Screen
- Unit 2 – System-Wide Concepts
- Unit 3 – IRIS Training
- Unit 4 – Help Resources



## Course Learning Objectives




- Obtain a foundational understanding of IRIS
- Become familiar with the access and security issues
- Be able to execute basic navigational functions
- Understand key, system-wide concepts
- Learn the training process and how to obtain help

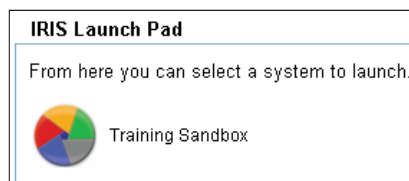


## Training Sandbox Access



 If you haven't already, request access to the **Training Sandbox** icon on your myUK-IRIS Launch Pad screen.

- ♦ Refer to the instructions listed on the myTraining page for this course.



- Clicking on this icon will open the IRIS Training System, which is used for several of the IRIS web-based training courses (WBTs) and is a great place to practice transactions.
- The IRIS Training System is a copy of the IRIS Production System with fictional data.

## Check for Understanding



- The Check for Understanding is a series of questions (quiz) which will be presented at the end of each unit.
- You must successfully pass a unit's Check for Understanding before proceeding to the next unit.



## Introduction


## Enterprise Applications Group



- The Enterprise Applications Group (EAG) is a UK department charged with supporting the key administrative computing systems for the University of Kentucky.
- Its primary focus is the integrated Enterprise Resource Planning (ERP) software from SAP.
- The EAG is assigned the responsibility of enhancing, maintaining, and supporting the functional operations of the ERP software to support and further the goals and objectives of the various operational units across campus.
- The EAG office may be reached at (859) 257-3514.

## SAP & IRIS



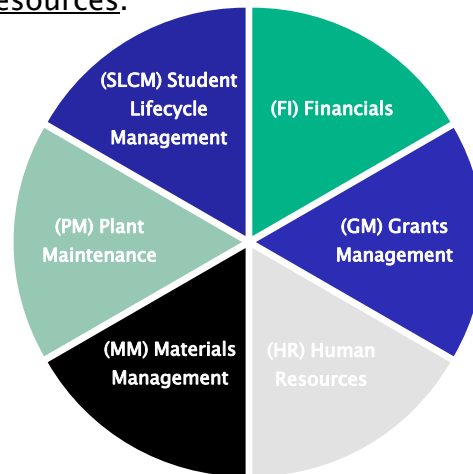
- SAP (Systems, Applications, and Products) is: 
  - ♦ the technical name of the ERP software used to manage the business and service processes of the University of Kentucky; and
  - ♦ the name of the German-based company that produces the software.
- The SAP software has been configured to meet UK's specific administrative and academic business needs and given the name IRIS, Integrated Resource Information System.



## IRIS Modules



- These are the main modules in the IRIS database that are highly integrated with each other in managing the University's resources.



## IRIS Integration



- IRIS integration 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 due to more information being available on-line.
- Example integration points:
  - ♦ Employee ID (HR) is integrated with Student ID (SLCM).
  - ♦ Purchased materials (MM) are charged to cost objects (FI/GM).
  - ♦ Payroll expenses (HR) are charged to cost objects (FI/GM).

## IRIS Access Requirements



- IRIS employs role-based security, which controls a user's access. Access is granted based on the user's role and job responsibilities.
- IRIS access requirements are as follows:
  - ✓ The user must have an Active Directory (Link Blue) **User ID** and **Password**.
    - If unknown, contact either the departmental IT personnel or the IT Customer Service Center (CSC) at (859) 218-HELP (4357).
  - ✓ The user must sign the **Statement of Responsibility (SOR)**.
    - See [www.uky.edu/IRIS/train/SOR\\_Information.html](http://www.uky.edu/IRIS/train/SOR_Information.html) for information and instructions.

## IRIS Access Requirements (Continued)



- ✓ The user must have a current, approved **IRIS Training Plan**, which indicates the mandatory courses the user must successfully complete in order to carry out their job responsibilities in IRIS.
- ✓ The user must successfully **complete the mandatory training**, as well as **demonstrate competency** through an assessment at the conclusion of each Level 300, role-based course.



## IRIS Access Requirements (Continued)



The **SAP GUI (Graphical User Interface)** software must be installed on the user's PC.

- It is installed if the **myUK University of Kentucky** icon is seen on the PC's Desktop. If not, check with your area's IT personnel or contact the appropriate IT Help Desk: Campus users contact the IT CSC at (859) 218-HELP (4357); HealthCare users contact the UKHC Help Desk at (859) 323-8586.



myUK  
University of  
Kentucky

- The GuiXT software must also be installed for Plant Maintenance (PM) users. Contact the departmental PM Power User in your area for assistance.

## IRIS Access Changes/Removal



**Business Officers should notify the appropriate Area Security Officer (ASO) when users change roles, positions, or leave the University so that IRIS access can be modified or removed!**

- ♦ **All access/Training Plan changes are made using the IRIS Training Plan Request Form and must be ASO approved.**
  - [http://myhelp.uky.edu/rwd/HTML/Training\\_Plan\\_Request.html](http://myhelp.uky.edu/rwd/HTML/Training_Plan_Request.html)
- ♦ **Requests to completely remove access must be e-mailed to the IT Customer Service Center at [accounts@lsv.uky.edu](mailto:accounts@lsv.uky.edu).**



## Other IRIS Access Information






- IRIS may be accessed from any PC on campus as long as the SAP GUI software is installed on the machine.
- IRIS may also be accessed remotely from a home PC.
  - ♦ Both the SAP GUI and Cisco VPN software must be installed. This software can be obtained by one of the following methods:
    - The UK Download website: <https://download.uky.edu>
    - Take a writable CD to the IT CSC in room 111 McVey Hall
  - ♦ Call the IT CSC for assistance at (859) 218-HELP (4357).
- Visit the IRIS website ([www.uky.edu/IRIS](http://www.uky.edu/IRIS)) and click on **Desktop Information** in the **Quick Links** box for browser and other software recommendations and information.



## myUK Portal



- IRIS is accessed via the **myUK** portal (website).
1. Access the **myUK** sign on screen by one of the following:
- Double-click on the **myUK** icon on the Desktop (which overrides the current browser location!)  

  - Click on the **myUK** link on UK's main "link blue" website ([www.uky.edu/UKHome/subpages/linkblue.html](http://www.uky.edu/UKHome/subpages/linkblue.html))  

  - Click on the **myUK** link on the main IRIS website ([www.uky.edu/IRIS](http://www.uky.edu/IRIS))  




## myUK Portal (Continued)



### 2. Enter your link blue User ID and Password

**Welcome to myUK**

Use your [link blue](#) ID to Sign On to this portal.

User ID

Password

### 3. Click on the Sign On button (or press the Enter key)

- The myUK portal will open (see next slide).

## myUK Portal (Continued)

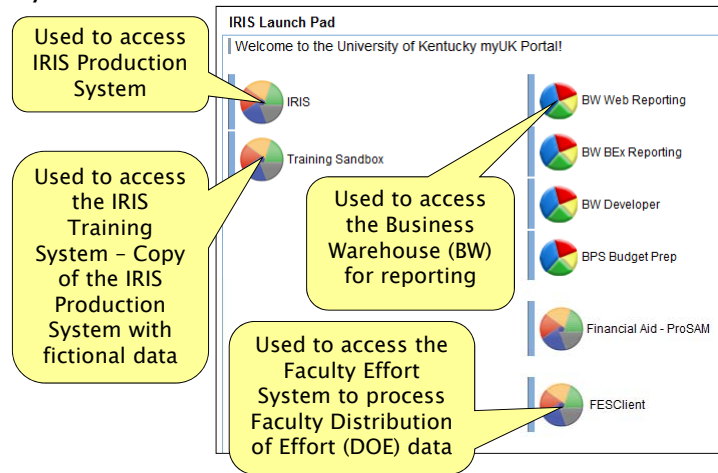


**Note: Based on your access, the available tabs and the "beach ball" icons on the IRIS Launch Pad may be different than what is seen here!**

## myUK Portal – IRIS Launch Pad



- The “beach ball” icons on the **IRIS Launch Pad** are used to access various systems. Click on an icon to “launch” the system.



## myUK Portal – Other Web-based Services



- The **myUK** portal also provides a gateway or single point of entry to other UK web-based services for students, faculty, and staff. For example:



- ♦ The **Student Services** tab is used by UK students.
- ♦ The **Student Administration** tab is used by staff & faculty.
- ♦ The **Enterprise Services** tab is for UKY Web Procurement.
- ♦ The **Employee Self-Service** tab is used by all employees/students who receive pay from the University.
- ♦ More information will be provided in associated courses.

## Security



- Your User ID and password must not be shared with others, which is also a part of the Statement of Responsibility!
- When leaving the PC, keep access secure by either:
  - ♦ Locking the computer (**Ctrl+Alt+Delete** keys → **Lock Computer**); or
  - ♦ Closing all IRIS sessions, signing off of the **myUK** portal, and completely closing the internet browser.
- If prompted, do not allow the PC to remember any IDs 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 select users have access to the audit analysis report.
- Some example information the audit log contains:
  - ♦ Audit event
  - ♦ User's SAP ID
  - ♦ Transaction code
  - ♦ Time and date when event occurred
  - ♦ Session number
  - ♦ Old/New information

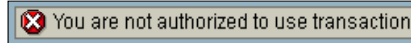


## Authorization Issues

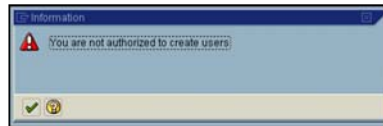


- An authorization issue exists when either of the following messages are seen:

- ♦ From the Status Bar (lower-left corner of screen):

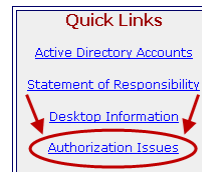


- ♦ In a pop-up window:

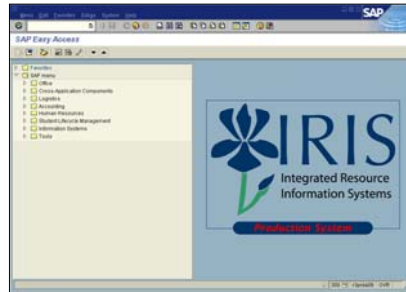


- To report authorization issues:

1. Go to the IRIS website: [www.uky.edu/IRIS](http://www.uky.edu/IRIS)
2. Click on the **Authorization Issues** link in the **Quick Links** box (lower-left corner of the window)
3. Follow all of the instructions listed



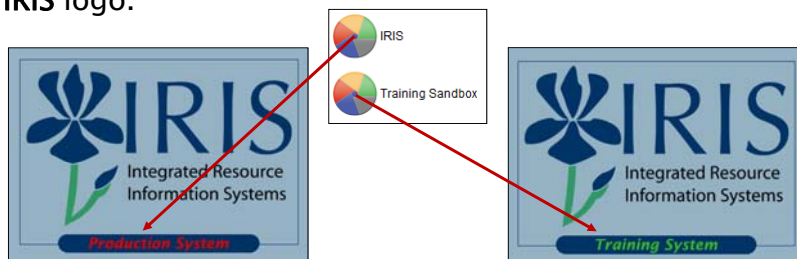
## Introduction Check for Understanding



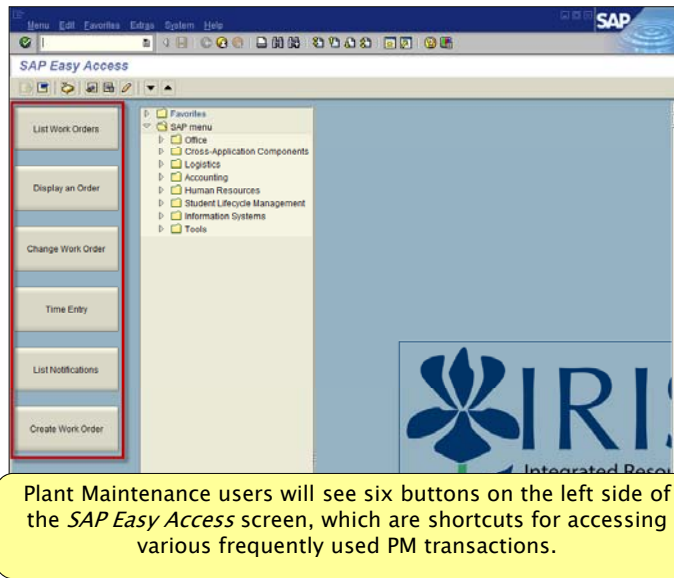
# SAP Easy Access Screen

## SAP Easy Access Screen

- The *SAP Easy Access* screen will appear when either the **IRIS** or **Training Sandbox** “beach ball” icon is clicked in the **IRIS Launch Pad** area of the **myUK** portal.
- The screens are identical except for the wording under the **IRIS** logo.



## Plant Maintenance *SAP Easy Access* Screen



Plant Maintenance users will see six buttons on the left side of the *SAP Easy Access* screen, which are shortcuts for accessing various frequently used PM transactions.

## IRIS Transactions



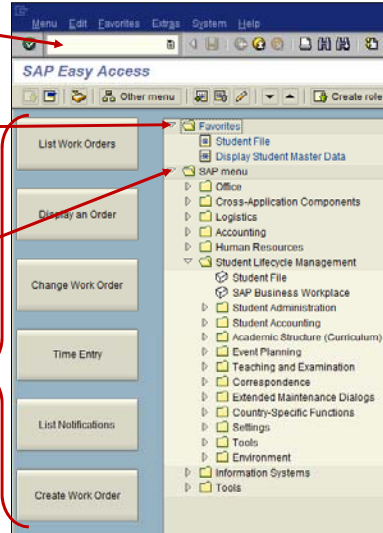
- A transaction is an executable business process in IRIS, for example:
  - ♦ Adding a new hire
  - ♦ Entering an employee's attendance and absence time
  - ♦ Displaying an Organizational Unit's budget for reconciliation
  - ♦ Maintaining a student's financial records
  - ♦ Creating a job order for Physical Plant to fix a door handle
- Each transaction in IRIS has a title and a transaction code (t-code), which is a combination of alphanumeric characters that identifies the transaction.
  - ♦ As you take your required training courses, you will learn which t-code(s) you need in order to execute the business process(es) you will use in your job.

## Accessing IRIS Transactions



- Access a transaction by any of the following methods:

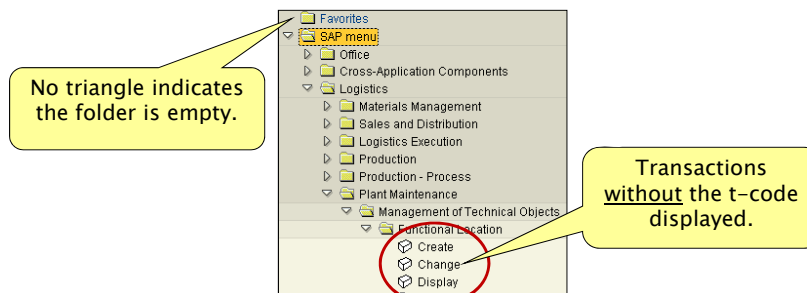
- ♦ Enter the t-code in the **Command Field**, then press the **Enter** key
- ♦ Add frequently used t-codes to the **Favorites** folder, then double-click on the transaction to open
- ♦ Click through the **SAP menu** tree structure, then double-click on the transaction to open
- ♦ For Plant Maintenance users, click on one of the **PM Easy Access Buttons**



## SAP Menu



- All SAP-delivered transactions are located in the **SAP menu** folders. Double-click on a transaction to open.

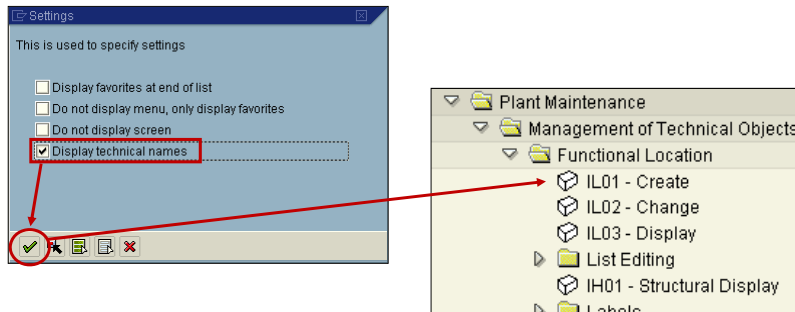


- Custom-built transactions (starting with the letter "Z") are not in the **SAP menu** folders. The t-code can either be entered in the Command Field or added as a shortcut in the **Favorites** folder.

## Displaying Transaction Codes



- To display transaction codes on the screen:
  1. Select **Extras** → **Settings** from the Menu Bar
  2. Click in the checkbox next to **Display technical names**
  3. Click on the green **Continue** icon or press **Enter**



- **Note:** This is just a one-time process.

## Favorites Folder



- The **Favorites** folder on the **SAP Easy Access** screen can contain shortcuts to frequently accessed transactions.
- Everything in this folder is created and organized as desired by the user.
- Sub folders may also be created and transaction shortcuts inserted in them for further grouping and organizational options.
- Favorites inserted in one system (Production or Training) will not copy into the other.
  - ♦ They must be inserted separately in each system.
- Favorites are stored with a user's profile, thus making them available wherever the user logs into IRIS.

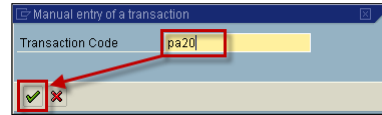




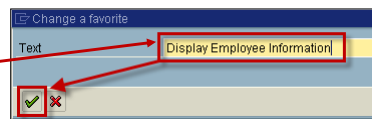
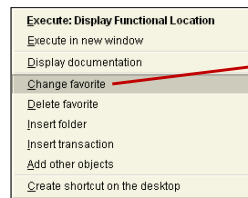
## Inserting Favorites



- In the Menu Bar select **Favorites** → **Insert transaction** (or right-click on the **Favorites** folder and select **Insert transaction**); enter the **Transaction Code**; then click on the green **Continue** icon.



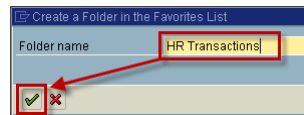
- ♦ If desired after inserting, change the displayed name of a favorite by right-clicking on the transaction and choosing **Change favorite** from the drop-down menu; edit the **Text**; then click on the green **Continue** icon to accept the change.



## Inserting Favorites (Continued)



- To insert a sub folder, click once on the **Favorites** folder to select; choose **Favorites** → **Insert folder** in the Menu Bar (or right-click on the **Favorites** folder and select **Insert folder**); enter a desired **Folder name**; then click on the green **Continue** icon.

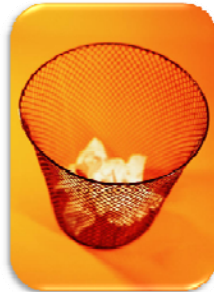


- **NOTE:** Favorites do not automatically display in alphabetic or numeric order when inserted. However, they can be manually rearranged by using the “drag-and-drop” method: Click once on the item and hold down on the left mouse button; drag to the desired location; then release the mouse button.

## Deleting a Favorite



- Any favorite may be deleted by choosing **Delete favorite** from the same drop-down menus available when inserting a favorite.
- This deletes only the “shortcut” to the transaction, not the actual IRIS transaction in the **SAP** menu.



## Other Screen Elements

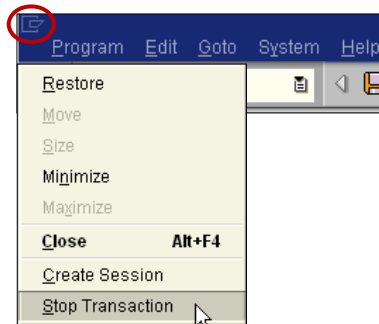


The screenshot shows the SAP HR Master Data screen for 'Display HR Master Data'. The interface includes a menu bar at the top with 'SAP' and 'Display HR Master Data'. Below the menu bar is a title bar with the text 'Display HR Master Data'. The main content area is divided into several sections: 'Person ID' (9901750), 'Name' (Richard L. Cunningham), 'Emplo No' (1001.00), 'Personnel Area' (1000 High Campus), 'Subgroup' (93 Exempt Monthly), and 'Personnel Subarea' (9901 Reg FT). The screen is organized into tabs: 'UK Personal Data', 'UK Payroll Data', 'UK Benefits', and 'UK Organizational Data'. The 'UK Personal Data' tab is active, showing a list of data elements with checkboxes. The 'Period' section has radio buttons for 'Today', 'Current week', 'Current month', 'All', 'From current date', 'Last month', 'To current date', 'Current period', and 'Current year'. There is a 'Choose' pushbutton below the radio buttons. The 'Status Bar' at the bottom right shows 'PA20', 'f3tm', and 'OVR'. Labels with arrows point to various UI elements: Window Control Icon, Command Field, Menu Bar, Standard Toolbar, Application Toolbar, Title Bar, Input Field, Tabs, Radio Button, Pushbutton, and Status Bar.

## Screen Element – Window Control Icon



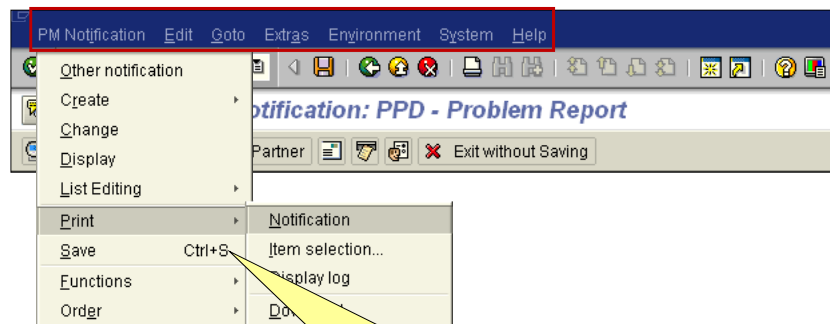
- The **Window Control** icon in the top-left corner provides a menu of various options related to the current window.
- Two key options which may be most helpful:
  - ♦ **Create Session** opens another IRIS *SAP Easy Access* window.
  - ♦ **Stop Transaction** is used to stop/cancel a transaction that may be taking a long time to execute/process.



## Screen Element – Menu Bar



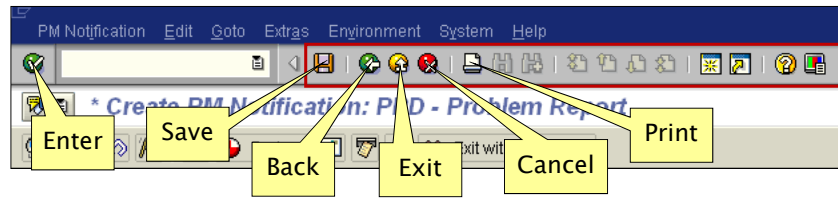
- The Menu Bar contains different menu categories and options, each with their own drop-down menu(s), depending on the current transaction.



## Screen Element – Standard Toolbar



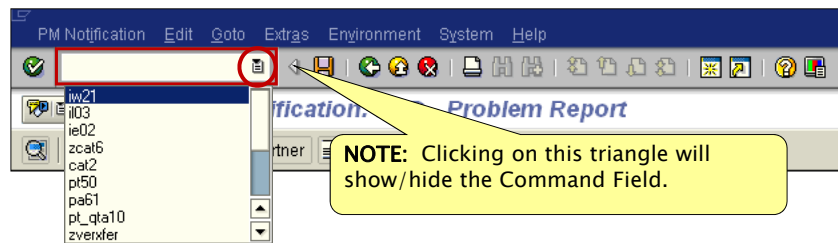
- The Standard Toolbar contains icons used for standard, system-wide functions.
- The items in this toolbar will remain in place, regardless of the transaction.
- Grayed-out icons represent functions that are not available on the current screen/transaction.



## Screen Element – Command Field



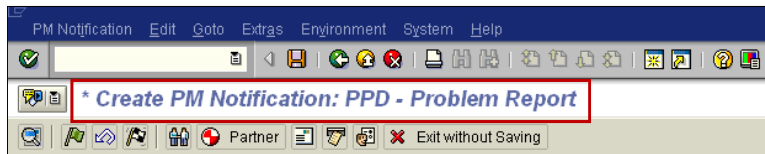
- The Command Field is also in the Standard Toolbar.
- A transaction code can be entered directly in this field to “command” the system to access the corresponding transaction.
- Click on the drop-down icon on the right side of the field to obtain a listing of the most recently manually-entered transaction codes.



## Screen Element – Title Bar



- The Title Bar lists the name of the current transaction.
- It will quite often begin with a word, such as **Create**, **Change**, **Display**, **List**, **Maintain**, **Schedule**, etc., that indicates the current mode.



- The title will also be displayed on the IRIS program button in the Windows Taskbar for easy identification.



## Screen Element – Application Toolbar



- The Application Toolbar contains icons and pushbuttons for functions directly related to the current transaction (application).
- These items will change with each screen/transaction, unlike the Standard Toolbar.



Icon

Pushbutton

- Icons and pushbuttons can also be seen on other parts of the screen, not just in the toolbars.

## Screen Element – Status Bar – Left Side

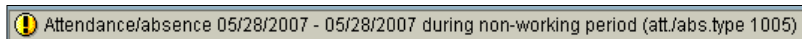


- The Status Bar displays system messages in the lower-left corner of the screen.

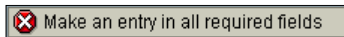
- ♦ **Informational Messages** indicate successful processing.



- ♦ **Warning Messages** provide important information and/or prompt users to stop and check certain data before proceeding. Always read, then press **Enter** to acknowledge and continue.



- ♦ **Error Messages** must be addressed before the system will allow the user to continue.



- Double-click on a message to view further details.

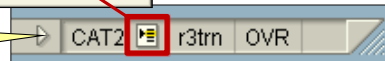
## Screen Element – Status Bar – Right Side



- The right side of the Status Bar displays mostly technical system information.
- Click on the **List** icon to obtain a menu of items to display.
- **Transaction** is the recommended option. With this selected, the current transaction code will be displayed for easy reference.

|                     |               |
|---------------------|---------------|
| System              | R3T (1) (590) |
| Client              | 590           |
| User                | KREAGER       |
| Program             | SAPLCATS      |
| Transaction         | CAT2          |
| Response Time       | 591 ms        |
| Interpretation Time | 521 ms        |
| Round Trips/Flushes | 1/0           |

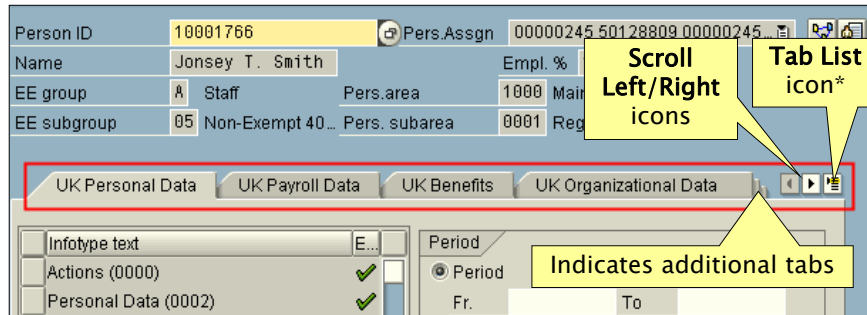
**NOTE:** Clicking on this triangle will show/hide the data in this area.



## Screen Element – Tabs



- Tabs on a transaction screen indicate individual screens that contain related data grouped together.
- Click on any tab to display the data on that screen.

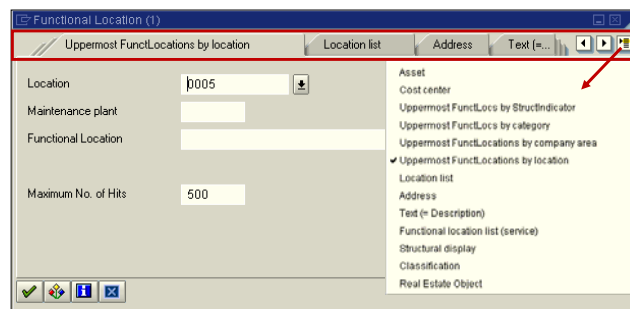


\* The **Tab List** icon will display a drop-down menu listing all of the tabs. Click on the desired tab name, and the system will automatically display that screen.

## Screen Element – Tabs in Search Window



- Tabs can also be seen and used in search windows.
- Each screen contains various criteria fields used to assist in narrowing down the search results.

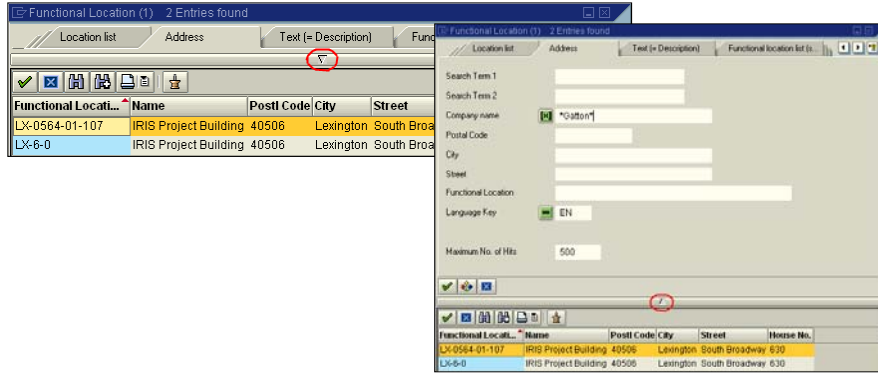


- **Maximum No. of Hits** determines how many search results will initially display. Default is 500, but may be changed to any number not to exceed 9999.

## Screen Element – Tabs – Show/Hide Icon



- Once the results from a search are displayed, the **Show/Hide** icon (triangle 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.



## Screen Elements – Selection Options



- Radio buttons and checkboxes are used to choose various selection options.
- To change radio button selections, click on another radio button. Clicking on the current, selected radio button will not un-select the option.
- Multiple clicks in a checkbox will toggle the checkmark on/off.

Period

Period

Fr.  To

Today  Curr.week

All  Current month

From curr.date  Last week

Up to Today  Last month

Current Period  Current Year

Start/End Dates

Required start   Priority

Required End    Breakdown



## Screen Element – Input Field



- Data can be entered in any white/yellow Input Field.
  - ♦ A yellow input field indicates the location of the cursor.
- Some Input Fields may contain free form text.

The screenshot shows a form with several input fields. Three callout boxes provide explanations:

- Grayed-out fields are for display purposes only.** (Points to a field with a gray background)
- Free form field: Any text may be entered.** (Points to a field with a yellow background)
- Longer Text icon: Used to enter more text than what will fit in the field.** (Points to a field with a scroll icon)

Below these, a section titled "Reference object" contains a field for "Funct. Location" with the value "LX-0026-02-230" and a "Possible Entries" icon (a square with a magnifying glass) circled in red.

- Input Fields with the **Possible Entries** icon must contain a pre-established, system value. The icon allows a user to search for the value, if unknown. (*Further information on the Possible Entries icon will be given later in this course.*)

## Screen Element – Required Field Indicator

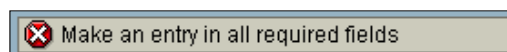


- Any field containing a checked box on the left side indicates a required field. The system will not proceed until completed.

The screenshot shows a form with several fields. Red circles highlight the checked boxes in the left margin of the following fields:

- Last name
- First name
- SSN
- Birth date

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



## Screen Element - Drop-Down Menu Icon



- Click on the **Drop-Down Menu** icon on the right side of a field to display a list of pre-established values.

A screenshot of a web form with several input fields. The fields are labeled: Name, Title, Last name, First name, Middle name, Suffix, and Name. A drop-down menu is open over the Title field, showing a list of options: 1 Ms., 2 Mr., 3 Miss, 4 Mrs., and 5 Dr. A mouse cursor is pointing at the "2 Mr." option. A red circle highlights the drop-down menu icon on the right side of the Title field.

- Click on the desired value to select.
- Only a value from the drop-down menu is accepted.




# Unit 1

## Check for Understanding



# System-Wide Concepts

## Changing Transactions

- To change from one transaction to another, either:
  - ♦ Click on the **Back** icon  in the Standard Toolbar until you return to the **SAP Easy Access** screen. Then either enter the next t-code in the Command Field, select it from your **Favorites** folder or the **SAP menu**, or click on one of the PM Easy Access Buttons; OR
  - ♦ From the current transaction's screen, enter the new t-code in the Command Field **preceded by "/N"** (for **New**).
    - There is no space between "/N" and the t-code.
    - For example: You are in t-code IL03, but you want to switch to IE03. Enter the following in the Command Field:



- NOTE: The "/N" is not needed if you are on the **SAP Easy Access** screen.

## Opening Additional IRIS Sessions



- Up to six (6) IRIS sessions (screens) may be open simultaneously.
- Open additional sessions by one of the following methods:
  - ♦ Select **System** → **Create Session** in the Menu Bar
  - ♦ Click on the **Create New Session** icon in the Standard Toolbar



- The sessions can be easily identified by the IRIS program buttons in the Windows Taskbar.



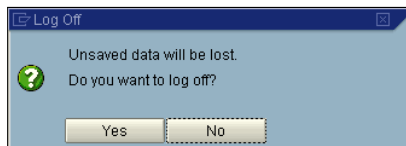
## Ending Additional IRIS Sessions



- End additional sessions by one of the following methods:
  - ♦ Click on **System** → **End Session** in the Menu Bar
  - ♦ Click on the “x-box” in the upper-right corner of the screen



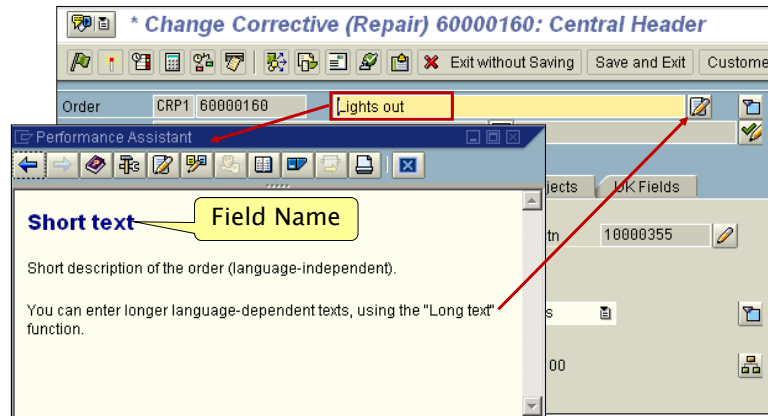
- **Important:** Be sure any unsaved data is either saved or the transaction is cancelled prior to the system ending a session! **The system may not prompt you to save if unsaved data exists, unless you are ending the last session open!**



## Field-Level Help - F1 Key



- This function provides SAP-delivered information on any field. The window will provide the full name of the field, along with a definition of and/or the purpose for the field.
- Place cursor in the desired field, then press the F1 key.



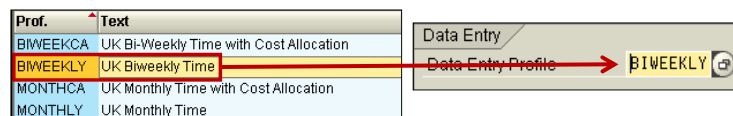
## Possible Entries Icon



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



- The correct field value may be manually entered if known.
- If the value is unknown, either click on the **Possible Entries** icon or press the F4 key to initiate a search.
- If the list of possible entries is relatively short, the list will immediately be displayed. Double-click on the desired value to select. The system will automatically populate the input field with the selected value.



## Possible Entries Icon (Continued)



- Fields with an extensive list of possible entries will first display a search window so various criteria may 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, the system would return a list of all vendors who are in a **City** that begins with the letters **Le**.

| Name 1                   | Name 2 | Vendor | Street                | City      | Rg | PostalCo |
|--------------------------|--------|--------|-----------------------|-----------|----|----------|
| GEOKON INC               |        | 100086 | 48 Spencer St         | LEBANON   | NH | 03766    |
| THE HITCHCOCK FOUNDATION |        | 100074 | 1 Medical Center Dr   | LEBANON   | NH | 03756    |
| CRESTLINE CO INC         |        | 100045 | 70 Mt Hope Ave        | LEWISTON  | ME | 04241    |
| BRAD CURRY               |        | 100131 | 658 Springdale Drive  | LEXINGTON | KY | 40503    |
| BROWN DOG MEDICAL SUPPLY |        | 100145 | 1234 S. Broadway St   | LEXINGTON | KY | 40506    |
| FREDD WILDCAT            |        | 100111 | 100 Ave. of Champions | LEXINGTON | KY | 40506    |

## Possible Entries Icon (Continued)



- ♦ In this example, the system would return a list of all vendors with the letters **man** in their **Name**.

| Name 1                    |
|---------------------------|
| KENTUCKY SPORTS TURF MANA |
| MANULIFE FINANCIAL        |
| SHERMAN CARTER BARNHART-F |
| SIS HUMAN FACTOR TECHNOLO |
| WS MANEY & SON LTD        |



# Master Data

## Master Data

- Master data is key, “master” information entered and maintained at different organizational levels in IRIS.
  - ♦ Typically remains unchanged over an extended period of time
  - ♦ Contains information that is always used in the same way
  - ♦ Can be used across modules/applications
  - ♦ Reduces data redundancy and data input
- Master data is presented in **Display** mode for users, based on their security access.
- Those responsible for maintenance of the information will have full editing rights.

## HR Master Data – Employee Example



**Display HR Master Data**

Transaction PA20 contains personnel information on an individual.

Person ID: 10001766 Pers.Assgn: 00000245 50128809 00000245...

Name: Jonsey T. Smith Empl. %: 100.00

EE group: A Staff Pers.area: 1000 Main Campus

EE subgroup: 05 Non-Exempt 40... Pers. subarea: 0001 Reg FT

UK Personal Data | UK Payroll Data | UK Benefits | UK Organizational Data

Infotype text: S...

Actions (0000)

Personal Data (0002)

Organizational Assignment (0001)

Addresses (0006)

Basic Pay (0008)

Cost Distribution (0027)

Date Specifications (0041)

Residence Status (0094)

Additional Personal Data (0077)

Period

From: To:

Today  Curr.week

All  Current month

From curr.date  Last week

To Current Date  Last month

Current Period  Current Year

Choose

Direct selection

Infotype: STy

## FI Master Data – Cost Object Example



**Display Cost Center: Basic Screen**

Drilldown

Cost Center: 1012062470 MCIS COMPUTER SYS

Controlling Area: UK00 University of Kentucky

Valid From: 01/01/1900 to 12/31/9999

Basic data | Control | Templates | Address | Communication | History

Names

Name: MCIS COMPUTER SYS

Description: MCIS COMPUTER SYS

Basic data

User Responsible:

Person Responsible: GINA LYSELL

Department: 3F220

Cost Center Category: W UK Cost Center

Hierarchy area: A3F220 Univ Computing Enterprise Systems

Company Code: UK00 University of Kentucky

Business Area: 0101 UK w/o component units

Functional Area:

Currency: USD

Profit Center:

Transaction KS03 contains information associated with a Cost Center (account number).



## SLCM Master Data – Student Example



**Display Student Master Data**

Transaction PIQST00 contains information related to a UK student.

Account Balance Account Data

01/06/2011

Student Number 10037714

Name Pitt, Derk \*04/15/1987, Male

Principal Org. Unit College Of Engineering

Status Student; Athlete; Honors Prg; ROTC; Resident

Program

Advisor David A Bryant

Personal Data Standard Address Address Overview Additional Data EthnicityRace

Gender  Male  Female  TBD

Title Valid On 01/06/2011

No periods

Last name Pitt

First name Derk

Middle name Henry

Known as

Name at Birth

ID number 687879514

Birth date 04/15/1987

Died on

Nationality US American US

Comm.lang. EN English

Initials

Name prefix

Other title

Title

Birthplace

Birth ctry/reg.

Nat.at Birth

Other Ntty

Marital Stat.

## MM Master Data – Vendor Example



**Display Vendor: Initial Screen**

Vendor 100106 Lexington Home Supply

Company Code UK00 University of Kentucky

Purch. Organization UK00 UK Purchasing

General data

- Address
- Control
- Payment transactions
- Contact Persons

Company code data

- Accounting info
- Payment transactions
- Correspondence
- Withholding tax

Purchasing organization data

- Purchasing data
- Partner functions

Transaction XK03 contains information related to a vendor contracted to do business with UK.

**Display Vendor: Address**

Vendor: 100106

Preview

Name

Title

Name Lexington Home Supply

Search terms

Search term 1/2 LEXINGTON

Street address

House no./street 240 Main

City/State/ZIP Code Lexington KY 40506

Country US United States Kentucky

Time zone EST

Each of the checked items above represents a separate screen, accessed by pressing the Enter key.

## PM Master Data – Equipment Example



**Display Equipment : General Data**

Equipment: H-1389    Category: Machines

Description: ICE CREAM MACHINE    Intern.note

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

ObjectType: 1100E    Ice Cream Machine

AuthorizGroup: HPPD    Medical Center PPD

Weight: 0.000    Size/dimension:

Inventory no.: 474953    Start-up date:

**Reference data**

AcquistValue: 0.00    Acquisition date:

**Manufacturer data**

Manufacturer: TAYLOR    ManufCountry:

Model number: 150-12    Constr.yr/mth:

ManufPartNo:

ManufSerialNo.: H8993720

**Customer warranty**

Begin guarantee:    Warranty end:

Master warranty:

Inherit Warranty     Pass on warranty

**Location data**

MaintPlant: UK10    UK Facilities

Location:

Room: 303

**Account assignment**

Company Code: UK00    University of Kentucky    Lexington

Business Area: 0101    UK w/o component units

Asset:

Cost Center:    / UK00

WBS Element:

StandOrder:

SettlementOrder:

**Responsibilities**

Planning plant: UK10    UK Facilities

Planner group:

Main WorkCtr: WMARTIN / HPPD    MARTIN, WILLIAM

Catalog profile:

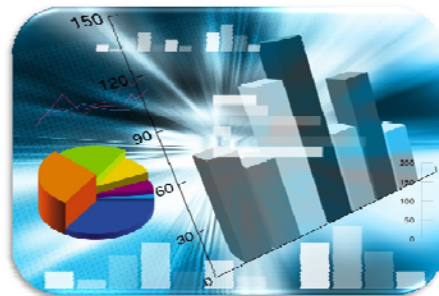
**Structuring**

Functional loc.: LX-0232-03

Description: NURSING - Floor 03

Superord.Equip.:

Transaction IE03 contains technical information on equipment.

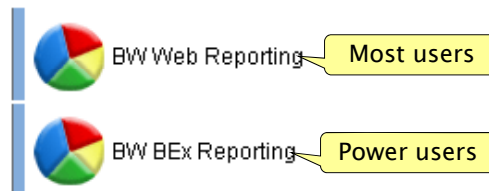


## Reporting

## Business Warehouse Reporting



- The majority of the system reporting will be done in the Business Warehouse (BW) using a web-based user interface called Business Explorer (BEx).
- Although highly integrated with IRIS, BW and BEx reporting are accessed via the corresponding “beach balls” on the myUK IRIS Launch Pad.



## Business Warehouse Example Report



- Once a report is displayed, further options and layout changes may be made using the pushbuttons across the top and the icons in the left section of the screen.

Data Analysis Graphical display Information Validity of Data: 06/24/2008 23:59:30

Save View Variable Screen Exceptions and Conditions Notes Export to Excel Export to CSV Print (Portrait) Print (Landscape) Show Repeated Texts

| Funds Center                     | GL Account | Posting date | Doc number | Entry Date | Debit Postings | Credit Postings |
|----------------------------------|------------|--------------|------------|------------|----------------|-----------------|
| 0000512011 Executive - Regular   |            | 07/01/2007   | 8500004096 | 07/20/2007 | \$ 11,705.36   | \$ (306.96)     |
|                                  |            |              |            |            |                | \$ 5,037.04     |
| 0000512012 Executive-Nproductv   |            | 07/01/2007   | 8500004096 | 07/20/2007 | \$ 0.00        | \$ (699.36)     |
|                                  |            |              |            |            |                | \$ 1,154.29     |
| 0000512031 Clerical - Regular    |            | 07/01/2007   | 8400028768 | 06/28/2007 | \$ 0.00        | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 1,376.89     |
| 0000512032 Clerical - Nproductv  |            | 07/01/2007   | 8500004015 | 07/11/2007 | \$ 0.00        | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 1,376.89     |
| 0000512071 Prof Nonadm-Regular   |            | 07/01/2007   | 8400027031 | 06/28/2007 | \$ 0.00        | \$ 0.00         |
|                                  |            |              |            |            |                | \$ (149.84)     |
| 0000512072 Prof Nonadm-Nproductv |            | 07/01/2007   | 8500004015 | 07/11/2007 | \$ 370.52      | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 174.51       |
| 0000512071 Prof Nonadm-Regular   |            | 07/01/2007   | 8500004169 | 07/26/2007 | \$ 25,169.37   | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 4,655.84     |
| 0000520103 EHC-Exec/Managerial   |            | 07/01/2007   | 8500004096 | 07/20/2007 | \$ 0.00        | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 0.00         |
| 0000520105 EHC-Clerical          |            | 07/01/2007   | 8500004015 | 07/11/2007 | \$ 227.00      | \$ 0.00         |
|                                  |            |              |            |            |                | \$ 227.00       |

Row 1 / 74

## IRIS Reporting

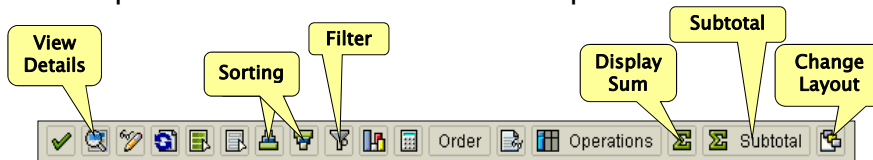


- There are several reporting transaction codes available directly in IRIS.
- A transaction begins with a selection screen where various selection criteria may be entered to obtain the desired information.
- The entered selection criteria for frequently run reports may be saved and easily retrieved each time the report is needed.

## IRIS Reporting Example Report



- Various icons in the Application Toolbar allow for further manipulation of the data seen in a report.



Display PM orders: List of Orders

| Order      | Type | Bus start  | Short text                               | Street         | Functional location | Total sum (actual) | Total actual costs |
|------------|------|------------|--|----------------|---------------------|--------------------|--------------------|
| 60000199   | CRP1 | 10/04/2006 | Test JV "Settlement"                     | Street Address | LX-0005             | 0.00               | 0.00               |
| 60000223   | CRP1 | 11/07/2006 | test                                     |                |                     | 0.00               | 0.00               |
| 60000224   | CRP1 | 11/07/2006 | test activity rate change                |                |                     | 51.84              | 51.84              |
| 60000227   | CRP1 | 11/09/2006 | Test 2 confirmations and then 1 cancella |                |                     | 33.26              | 33.26              |
| 60000228   | CRP1 | 11/09/2006 | Test materials only                      |                |                     | 1.01               | 1.01               |
| 60000230   | CRP1 | 11/09/2006 | test time entry                          |                |                     | 5.48               | 5.48               |
|            |      |            |  |                | LX-0005             |                    | 91.59              |
| 60000222   | HEV1 | 11/14/2006 | integrated Test Order-HEV1               |                | LX-0147             | 0.00               | 0.00               |
| 8001000004 | EVNT | 12/14/2006 | integrated test order evnt               |                |                     | 258.00             | 258.00             |
| 8001000005 | CASH | 12/14/2006 | integrated test order                    |                | LX-0147             | 22.93              | 22.93              |
|            |      |            |  |                |                     |                    | 280.93             |
| 60000229   | CRP1 | 11/09/2006 | Test various time scenarios              |                | LX-0293             | 24.19              | 24.19              |
| 60000247   | MRP1 | 11/29/2006 | This work order is a test only           |                |                     | 0.00               | 0.00               |
|            |      |            |  |                | LX-0293             |                    | 24.19              |
| 60000208   | MRP1 | 1/31/2006  | eEPAIR wORK                              |                | LX-0564             | 0.00               | 0.00               |
|            |      |            |  |                | LX-0564             |                    | 0.00               |
|            |      |            |  |                |                     |                    | 396.71             |

## Integration Visibility



- Integration visibility is the ability to drill down on certain values (names, numbers, etc.) seen on an IRIS screen or report and have the source information automatically displayed by the system for easy access.

Double-click on Order 60000199.

| S | Order    | Type  | Bsc start  | Short text           |
|---|----------|-------|------------|----------------------|
|   | 60000199 | R...  | 10/04/2006 | Test JV "Settlement" |
|   | 60000223 | CR... | 11/07/2006 | test                 |

\* Display Order: Initial Screen

Header data Operations Components

Order 60000199

The entire Order is displayed.

System opens transaction and populates the Order field. Press Enter to display.

\* Display Renovation(Charged Out) 60000199: Central Header

Order: CRN1 60000199 Test JV "Settlement"

Sys Status: TECO PCNF 6MPS PRC SETC DON

HeaderData Operations Components Costs Objects UK Fields

PlannerGrp / UK10

Mn.wk.ctr UNASSIGN / CPPD Unassigned Work

Bsc start 10/04/2006 Priority Renovations

Basic fin. 10/05/2006

Func. Loc. LX-0005 F.D.PETERSON SERVICE

Equipment

First operation

Operation Test JV "Settlement"

UNASSIGN / CPPD Ctrl key PNB1 Acty Type LABDR1

H Number 1

Bruce Miller





## Unit 2 Check for Understanding



# IRIS Training

## IRIS Training Plan

- IRIS training begins with the development of an IRIS Training Plan, which indicates the mandatory courses a user must successfully complete in order to obtain the necessary access in IRIS in order to perform their job responsibilities.
  - ♦ An IRIS Training Plan is established using the IRIS Training Plan Request Form.
    -  [http://myhelp.uky.edu/rwd/HTML/Training\\_Plan\\_Request.htm](http://myhelp.uky.edu/rwd/HTML/Training_Plan_Request.htm)
    -  All new Training Plans and Training Plan changes must be submitted using only this form.
  - ♦ For FI, HR and MM roles, the IRIS Training Plan Request Form is completed by the unit's Business Officer and submitted to the appropriate Area Security Officer (ASO) for approval. The ASO will submit the Training Plan to IRIS Training upon approval.


## IRIS Training Plan (Continued)



- ◆ For SLCM roles, the IRIS Training Plan Request Form is submitted directly to IRIS Training by designated contacts in the colleges and academic/student support units.
  - <http://www.uky.edu/IRIS/news/designatedcontacts.html>
- ◆ For Faculty members and Teaching Assistants who need access only for grading, class rolls, advisor holds, and overrides, the designated contacts only need to send a regular e-mail directly to the SLCM Team at [slcmaccess@lsv.uky.edu](mailto:slcmaccess@lsv.uky.edu) requesting the appropriate access.
- ◆ A Training Plan is valid for one (1) year from the time it is approved. Any Training Plan that has not been completed within one (1) year is no longer valid (for the uncompleted courses) and must be resubmitted if access is needed.

## IRIS Training Plan (Continued)



- ◆ A user needing additional training, due to a position change or new job responsibilities, should work with his/her Business Officer/designated contact to get Training Plan modifications processed.
- ◆ Once the approved IRIS Training Plan Request Form is submitted to IRIS Training, the required courses should appear in the **Mandatory Courses** section of the myTraining website (discussed momentarily) within the next few business days.
- ◆  Even though a user's required courses may not be showing yet in the **Mandatory Courses** section, the user can still begin taking the courses.

## IRIS Training Delivery Formats

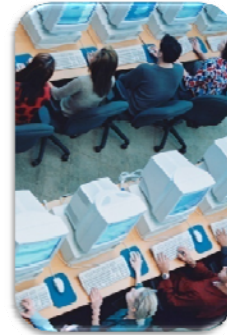


- IRIS courses are presented in two different formats:

### Web-Based Training (WBT)



### Instructor-Led (Classroom)



## IRIS Training Curriculum



- IRIS courses are divided into three levels and must be taken in the proper sequence:



- IRIS WBT and Instructor-Led courses are open to all employees. However, only the courses on your Training Plan and the successful completion of the Level 300 course assessments will give you the access needed for your job responsibilities.



## IRIS Training Curriculum (Continued)

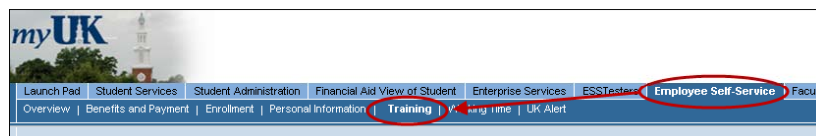


- Level 100 – IRIS Awareness & Navigation
  - ♦ This WBT is an introductory overview of IRIS, focusing primarily on basic navigational functions and general system information.
- Level 200 – Overviews & Role-Based WBTs
  - ♦ These WBTs are more focused overviews of the processes and functionality of the FI, HR, and SLCM modules.
  - ♦ There are also other overview and role-based WBTs available in this level.
- Level 300 – Role-Based Courses
  - ♦ These courses provide specific information and step-by-step instructions for processing each transaction required to perform a user's job.
  - ♦ Each course concludes with an assessment.
  - ♦ Some courses are WBTs, and some are Instructor-Led.

## myTraining Website



- The myTraining website contains all of the IRIS WBT and Instructor-Led courses.
- To access this website:
  1. Sign on to myUK
  2. Click on the **Employee Self-Service** tab
  3. Click on the **Training** sub-tab



**Note: Based on your access, the tabs on your myUK screen may be different than what is seen here!**

## myTraining Website (Continued)



- The **Training Home** link displays a user's **Mandatory Courses** that are yet to be completed and, under **My Training Activities**, the course(s) in which s/he is currently participating or for which s/he is booked.

myTraining

Navigation

- Training Home
- Information

Find

Search Term

Find Extended Search

My Learner Account

- Training Activities
- Course Prebookings
- Favorites
- Qualifications Profile
- Profile Matchup
- Settings

Course Catalog

Messages and Notes

Mandatory Courses (2)

The following courses are mandatory for you. You can display more information about a course, register or make a prebooking for one by clicking on the title.

| Course  | Delivery Method |
|---|-----------------|
| <a href="#">HR_TM_300 Time Management</a>       | Classroom       |
| <a href="#">HR_200 Human Resources Overview</a> | WBT             |

My Training Activities

All (0)

Your current training activities in summarized format.

| Course                                 | Delivery Method | Schedule | Room |
|--|-----------------|----------|------|
| The table does not contain any entries |                 |          |      |

Refresh Print

## myTraining Website (Continued)



- The **Training Activities** link displays the course(s) in which a user is currently participating or for which s/he is booked, and it will also list all of the **Completed Courses**.

myTraining

Navigation

- Training Home
- Information

Find

Search Term

Find Extended Search

My Learner Account

- Training Activities
- Course Prebookings
- Favorites
- Qualifications Profile
- Profile Matchup
- Settings

Course Catalog

Facilities Management

My Training Activities

All (0)

This is a list of all the training activities in which you are currently participating or for which you are booked. Click on a course to display details of the course, to cancel your booking, or to set the course to 'completed'.

Your current training activities in summarized format.

| Course                                 | Delivery Method | Schedule | Room |
|--|-----------------|----------|------|
| The table does not contain any entries |                 |          |      |

Completed Courses

All (33) Classroom Training (24) Web-Based Training (8) Online Tests (1)

You already participated in these courses in the past.

| User Name | Course   | Del...    | Schedule   |
|-----------|--|-----------|--|
|           | <a href="#">BEX_300 BEx-Web Reporting (Lab) - CONV</a> | Classroom | Start 08/31/2009 At 02:54<br>End 08/31/2009 At 02:55 |
|           | <a href="#">BEX_SLCM_300 BEx-Web Reporting - CONV</a>  | Classroom | Start 08/31/2009 At 01:46<br>End 08/31/2009 At 01:47 |
|           | <a href="#">FL_FES_300 FES Client Data Process</a>     | Classroom | Start 08/31/2009 At 01:24<br>End 08/31/2009 At 01:25 |

## myTraining Website (Continued)



- The **IRIS Training** link will display various **Subject Areas** (primarily IRIS modules).
- Click on any **Subject Area**, and the **Assigned Courses** for that area will be displayed.

The screenshot shows the myTraining website interface. On the left, under 'My Learner Account', the 'IRIS Training' link is circled in red. A red arrow points from this link to the 'Assigned Subject Areas' section in the middle. Another red arrow points from the 'HR - Human Resources and Payroll' subject area to the 'Assigned Courses' section on the right. The 'Assigned Courses' section lists several courses, including HR\_200 Human Resources Overview, HR\_PA\_300 Personnel Administration, and HR\_TM\_300 Time Management.

## myTraining Center Information



- Visit the IRIS Training website ([www.uky.edu/IRIS/train/](http://www.uky.edu/IRIS/train/)) and click on the various **myTraining Center Information** links to view further instructions for searching, booking, and taking IRIS WBT and Instructor-Led courses.

The screenshot shows the myTraining Center Information page. The page has a navigation bar with 'Home', 'EAG Information', 'Resources', and 'Communication'. Under 'EAG Information', there is a section for 'IRIS Training News' with a link to 'myTraining Center Information' and 'myTraining Center FAQ'. A yellow box highlights a list of instructions: 'How to search and register for a IRIS Training Course', 'Mandatory Courses', 'Registering and Taking a WBT Course', 'Signing the Statement of Responsibility (SOR)', and 'Transcripts - How to display and print'. Under 'Communication', there is a 'Class Information' section with links for 'Course Descriptions', 'myHelp', and 'Training Team'. A note at the bottom of the 'Communication' section states: 'Employees who need assistance should contact the Training Team at: IRISTraining@email.uky.edu'.

- Send an e-mail to [IRISTraining@email.uky.edu](mailto:IRISTraining@email.uky.edu) with any training-related issues, questions, etc.

## Course Abbreviations



- Following are a few examples of how to read the IRIS course abbreviations:
  - ♦ FI\_200 is a Level **200** **F**inance course.
  - ♦ HR\_TM\_310 is a Level **300** **H**uman **R**esources course covering **T**ime **M**anagement.
  - ♦ HR\_PA\_300 is a prerequisite for HR\_PA\_310, since **300** comes before **310**.
  - ♦ SLCM\_AD\_310 is an **A**dministrative, Level **300** **S**tudent **L**ifecycle **M**anagement course covering student records.

## Course Prerequisites



- Before booking a course, be sure you have completed all of the prerequisites. For example, the three **prerequisite qualifications/courses** for the Personnel Administration Actions course (HR\_PA\_310) are:

| Prerequisites  |
|--|
| The prerequisite qualifications for this course are: <ul style="list-style-type: none"><li>• <a href="#">HR Overview</a></li><li>• <a href="#">UK 100</a></li></ul>                      |
| The prerequisite courses for participating in this course are: <ul style="list-style-type: none"><li>• <a href="#">HR_PA_300 Personnel Administration (Classroom Training)</a></li></ul> |

- The **Prerequisites** section will be seen on the myTraining website for the course, along with other important information and the ability to book the course.
- Even though the prerequisite courses may not be listed in order by level, they must still be taken in order by level: Starting with UK\_100 → then the Level 200 Overview WBT(s) → then the Level 300 course(s).

## Access Timeframe



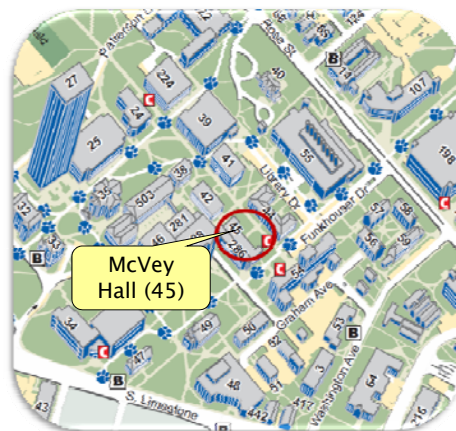
- Except for HR access, once you complete a level 300 course and IRIS Training confirms that you have completed all of the prerequisites and signed the Statement of Responsibility (SOR), you should have access within 1–2 business days.
  - ♦ For HR access, you must complete all of the mandatory courses listed in the HR Role on your Training Plan first (along with completing all prerequisites and signing the SOR), then access should be available within 1–2 business days.



## IRIS Training Locations



- The Instructor-Led courses are held in McVey Hall:
  - ♦ Room 72 in the basement by the elevator
  - ♦ Rooms 203/204 on the 2<sup>nd</sup> floor

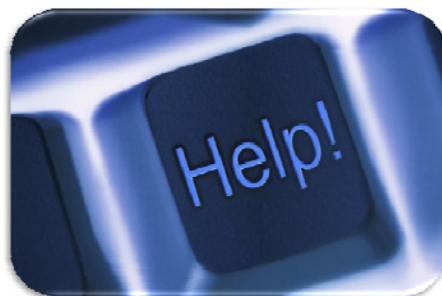




## Unit 3

# Check for Understanding

## Unit 4



# Help Resources

## IRIS Websites



- Visit the following IRIS websites for more information and helpful documentation.
  - ♦ IRIS Home – <http://www.uky.edu/IRIS>
  - ♦ IRIS Training – <http://www.uky.edu/IRIS/train>
  - ♦ IRIS myHelp – <http://myhelp.uky.edu/rwd/html/index.html>



## UK-Specific Documentation



- Process and procedural documentation will be distributed in each of the Instructor-Led training courses.
- Documentation is also available on-line on the **IRIS myHelp** website.
  - ♦ Printable versions of all IRIS courses (PowerPoint and Adobe Acrobat Reader PDF formats available)
  - ♦ Quick Reference Cards (QRCs)
    - These are printable documents which provide brief but specific, step-by-step instructions for processing transactions.
  - ♦ Frequently Asked Questions (FAQs)

## Technical Support



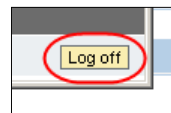
- Contact the IT Customer Service Center, (859) 218-HELP (4357), or your departmental IT personnel for any of the following reasons:
  - ♦ You need an Active Directory (link blue) ID and/or password
  - ♦ You go to the **myUK** Portal, and it is not responding
  - ♦ Your current IRIS session is suddenly terminated, and you cannot regain access
  - ♦ You need assistance with either the SAP GUI or Cisco VPN software installations



## Course Completion



- To complete this WBT, click on the yellow **Log off** button in the lower corner of this window.



- ♦ **Note:** This window will close, and you should be returned to the main, myTraining page for this WBT. The main page will refresh (usually within 30 seconds, depending on network traffic), and you should receive a green, system message confirming your participation. For example:



You may then safely navigate away from the main page.