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

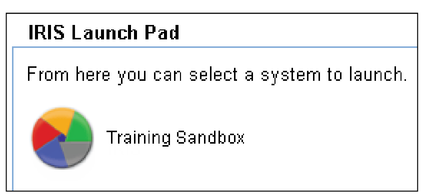
- Obtain a foundational understanding of IRIS
- Become familiar with the access and security issues
- Be able to execute basic navigational functions
- Understand key, system-wide concepts
- Learn the training process and how to obtain help

UNIVERSITY OF KENTUCKY IRIS Awareness and Navigation 3

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.

UNIVERSITY OF KENTUCKY IRIS Awareness and Navigation 4

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

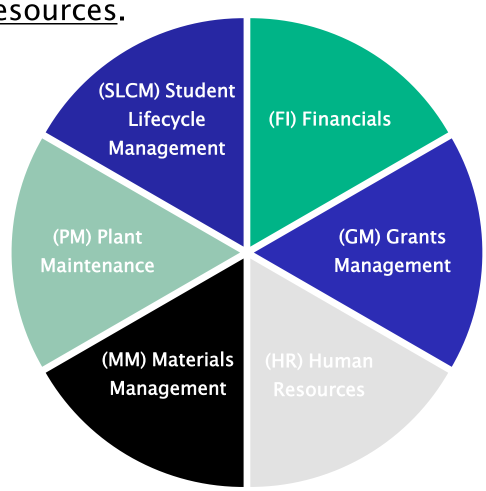
- The Enterprise Applications Group (EAG) is a UK department charged with supporting the key administrative computing systems for the University of Kentucky.
- Its primary focus is the integrated Enterprise Resource Planning (ERP) software from SAP.
- The EAG is assigned the responsibility of enhancing, 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 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 successful 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.

- 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
- Requests to completely remove access must be e-mailed to the IT Customer Service Center at 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) 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)

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

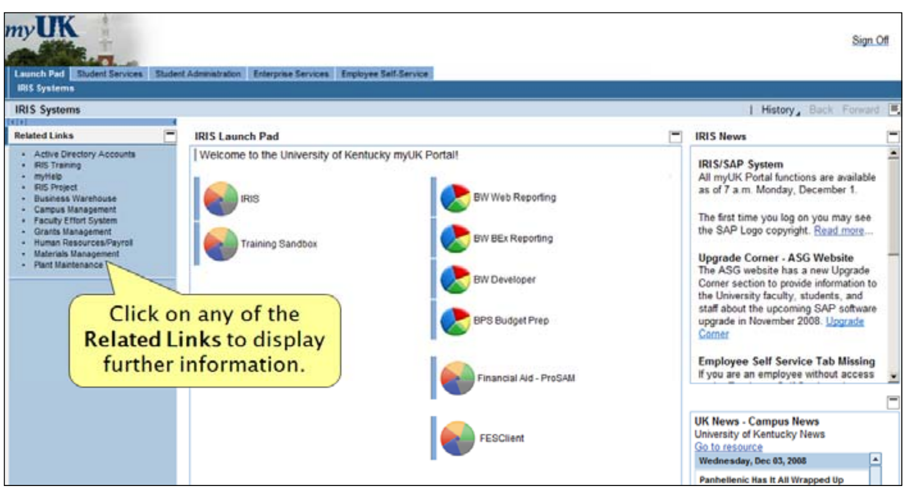
myUK Portal (Continued)

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

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

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

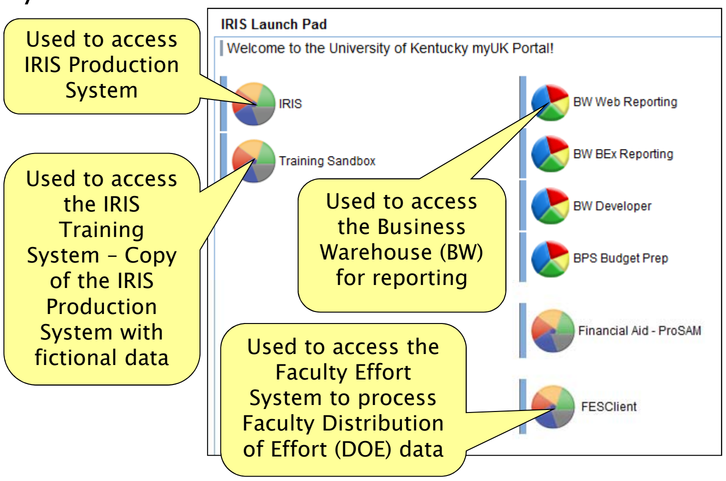
myUK Portal (Continued)



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

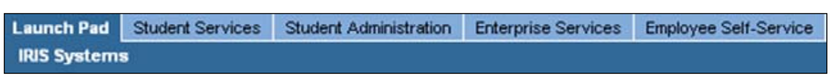
myUK Portal – IRIS Launch Pad

- 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.

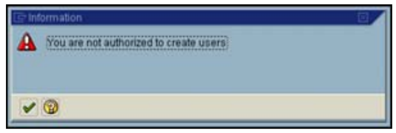
Security Audit Log

- 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
  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

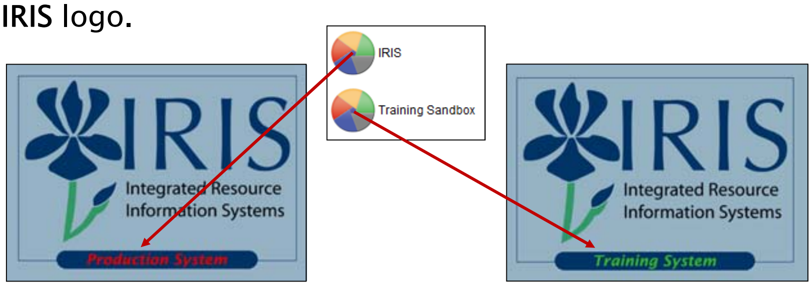
Introduction Check for Understanding

Unit 1

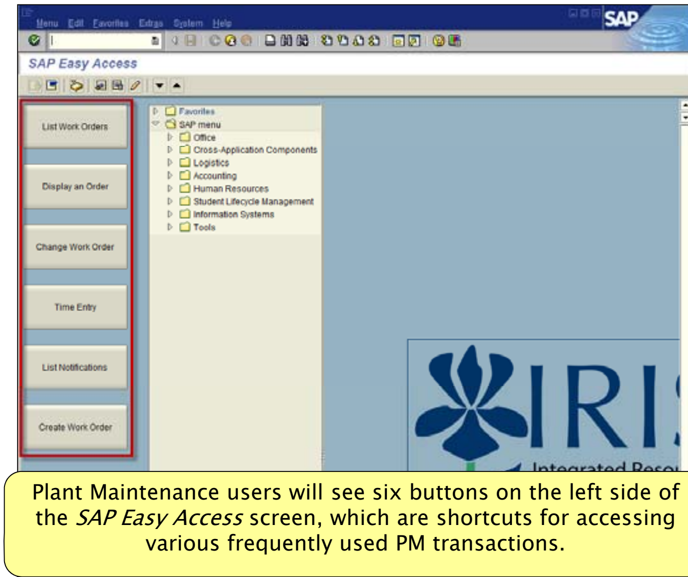
SAP Easy Access Screen

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



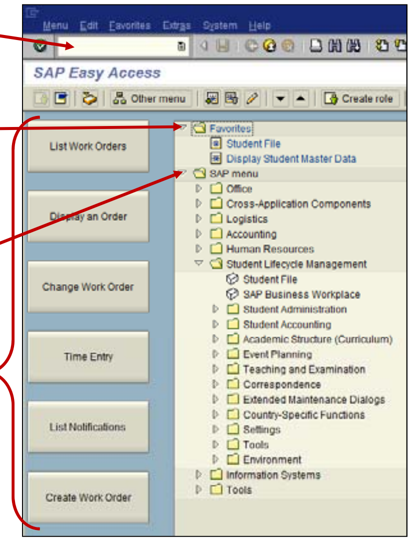
Plant Maintenance users will see six buttons on the left side of the *SAP Easy Access* screen, which are shortcuts for accessing various frequently used PM transactions.

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.

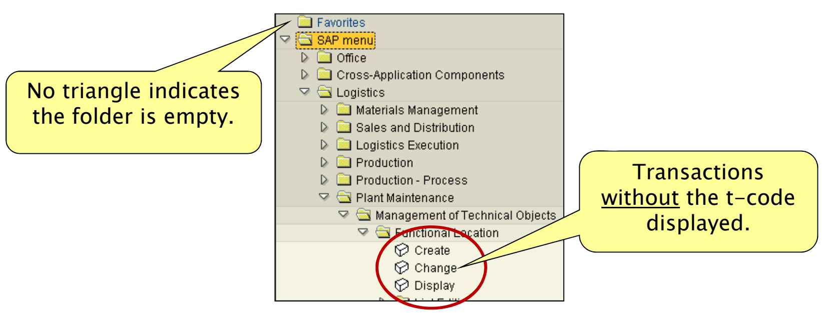
Accessing IRIS Transactions

- 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

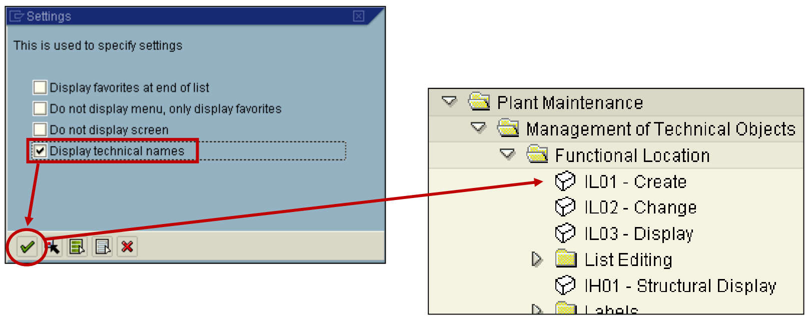
- All SAP-delivered transactions are located in the **SAP menu** folders. Double-click on a transaction to open.



- 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**



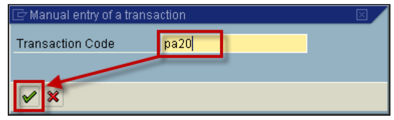
- **Note**: This is just a one-time process.

Favorites Folder

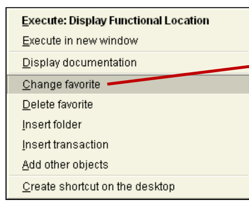
- The **Favorites** folder on the ***SAP Easy Access*** screen can contain shortcuts to frequently accessed transactions.
- Everything in this folder is created and organized as desired by the user.
- Sub folders may also be created and transaction shortcuts inserted in them for further grouping and organizational options.
- Favorites inserted in one system (Production or Training) will <u>not</u> 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.

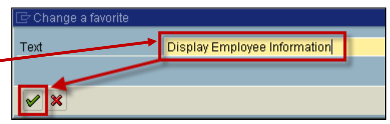
Inserting Favorites

- 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)

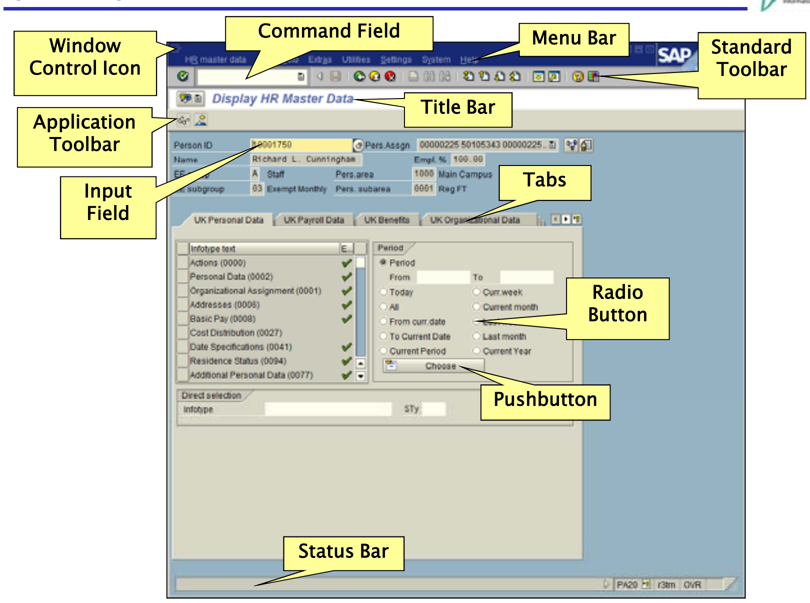
- To insert a sub folder, click once on the **Favorites** folder to select; choose **Favorites → Insert folder** in the Menu Bar (or right-click on the **Favorites** folder and select **Insert folder**); enter a desired **Folder name**; then click on the green **Continue** icon.

- **NOTE**: Favorites do <u>not</u> 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

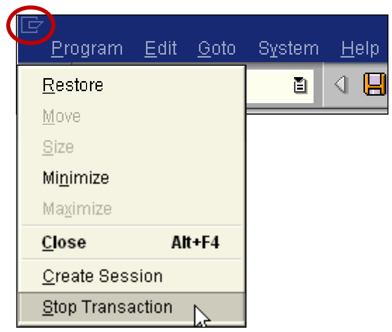
- Any favorite may be deleted by choosing **Delete favorite** from the same drop-down menus available when inserting a favorite.
- This deletes only the "shortcut" to the transaction, not the actual IRIS transaction in the **SAP menu.**

Other Screen Elements



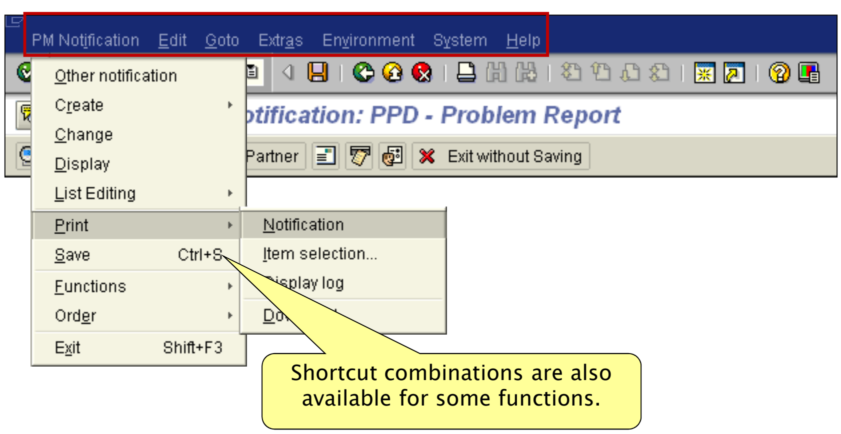
Screen Element – Window Control Icon

- 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.



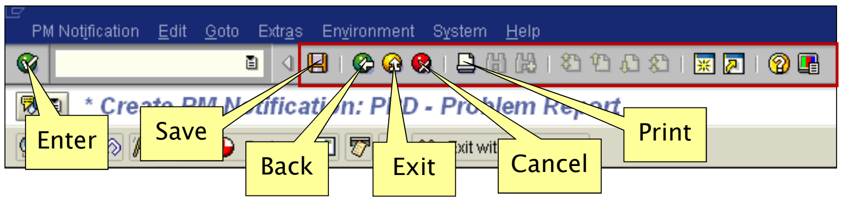
Screen Element – Menu Bar

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



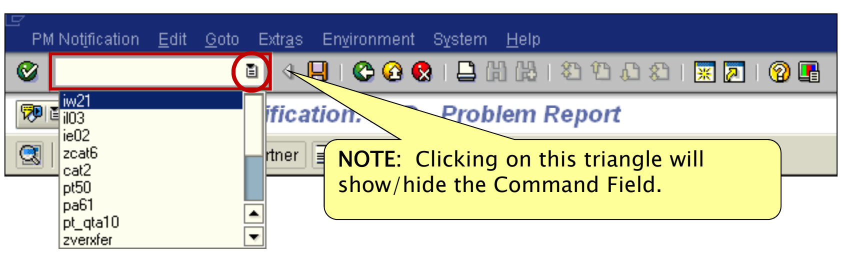
Screen Element – Standard Toolbar

- The Standard Toolbar contains icons used for <u>standard</u>, 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 <u>manually-entered</u> transaction codes.



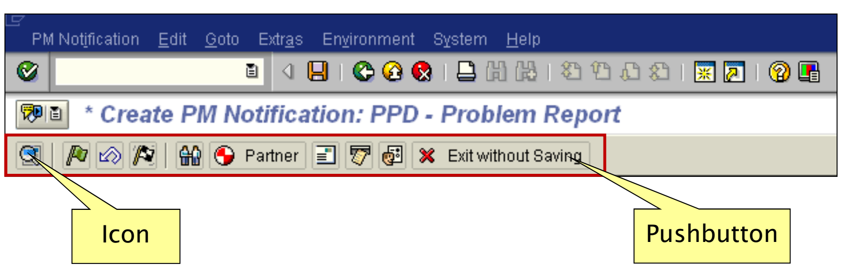
Screen Element – Title Bar

- 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 (<u>application</u>).
- These items <u>will</u> change with each screen/transaction, unlike the Standard Toolbar.



- 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.

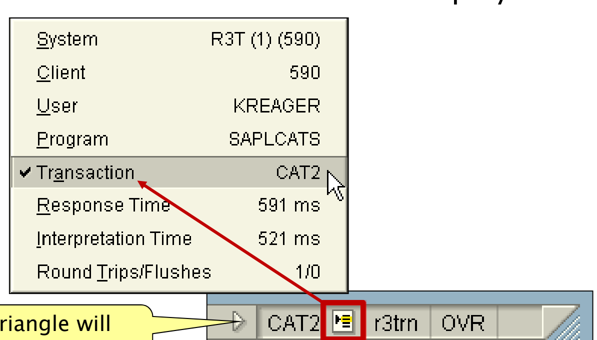
  - **Warning Messages** provide important information and/or prompt users to stop and check certain data before proceeding. Always read, then press **Enter** to acknowledge and continue.

  - **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

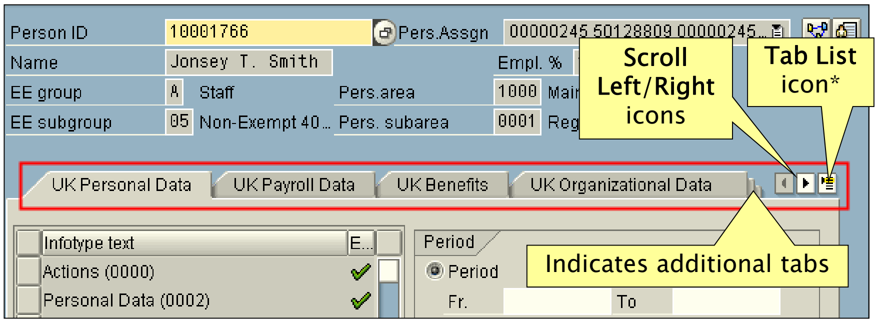
- The right side of the Status Bar displays mostly technical system information.
- Click on the **List** icon to obtain a menu of items to display.
- **Transaction** is the recommended option. With this selected, the current transaction code will be displayed for easy reference.



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

Screen Element – Tabs

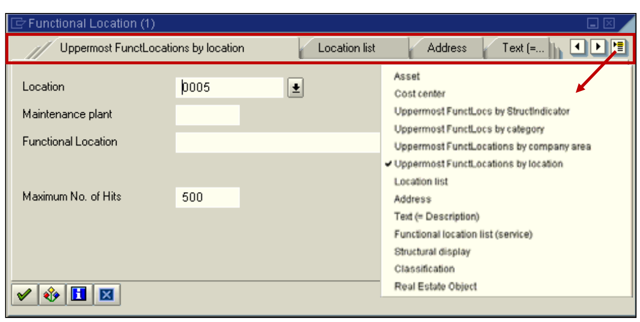
- Tabs on a transaction screen indicate individual screens that contain related data grouped together.
- Click on any tab to display the data on that screen.



* 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

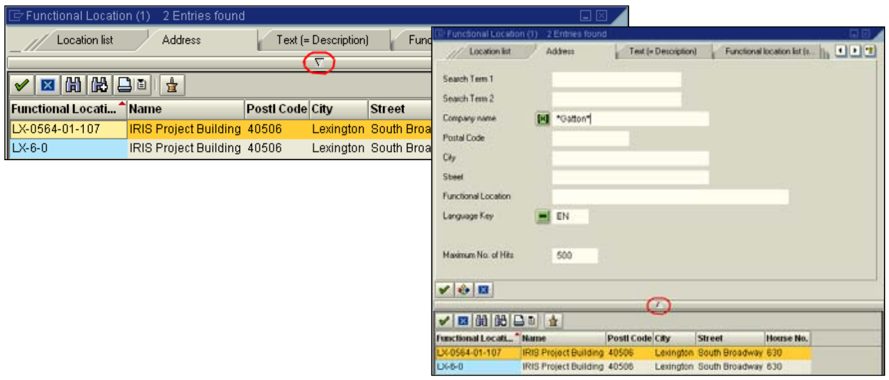
- Tabs can also be seen and used in search windows.
- Each screen contains various criteria fields used to assist in narrowing down the search results.



- **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.

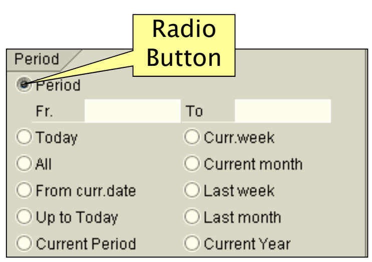
Screen Element – Tabs – Show/Hide Icon

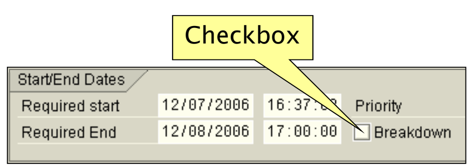
- Once the results from a search are displayed, the **Show/Hide** icon (triangle in the middle of the screen under the tabs) can be used to open/close the search window again, should the search criteria need to be revised to obtain different results.



Screen Elements – Selection Options

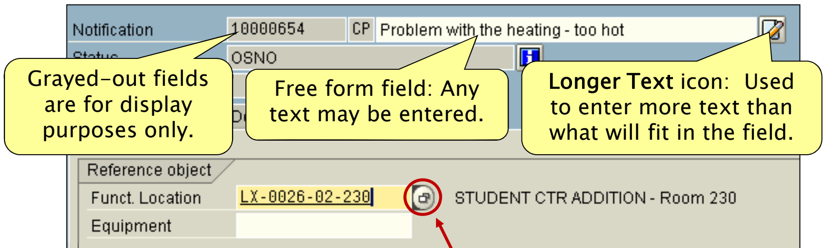
- Radio buttons and checkboxes are used to choose various selection options.
- To change radio button selections, click on another radio button. Clicking on the current, selected radio button will not un-select the option.
- Multiple clicks in a checkbox will toggle the checkmark on/off.





Screen Element – Input Field

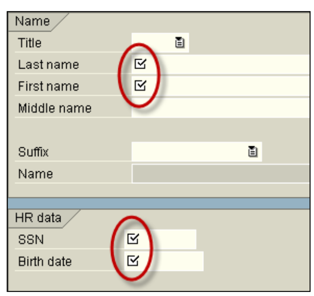
- Data can be entered in any white/yellow Input Field.
  - A yellow input field indicates the location of the cursor.
- Some Input Fields may contain free form text.



- Input Fields with the **Possible Entries** icon <u>must</u> 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

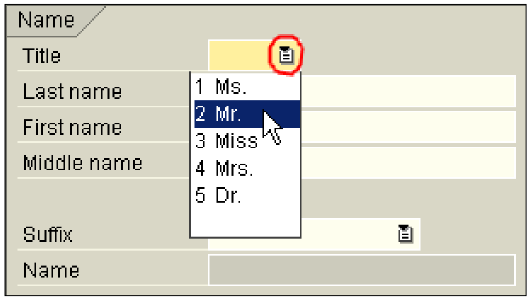
- Any field containing a checked box on the left side indicates a required field. The system will <u>not</u> proceed until completed.



- 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.



- Click on the desired value to select.

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

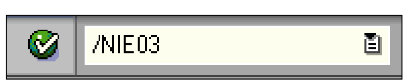
Unit 1
Check for Understanding

Unit 2

System-Wide Concepts

Changing Transactions

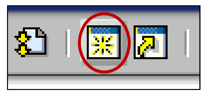
- To change from one transaction to another, either:
  - Click on the **Back** icon in the Standard Toolbar until you return to the ***SAP Easy Access*** screen. Then either enter the next t-code in the Command Field, select it from your **Favorites** folder or the **SAP menu**, or click on one of the 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

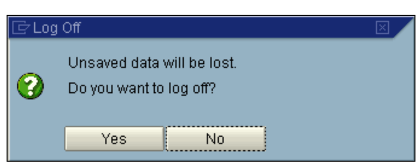


- The sessions can be easily identified by the IRIS program buttons in the Windows Taskbar.

Ending Additional IRIS Sessions

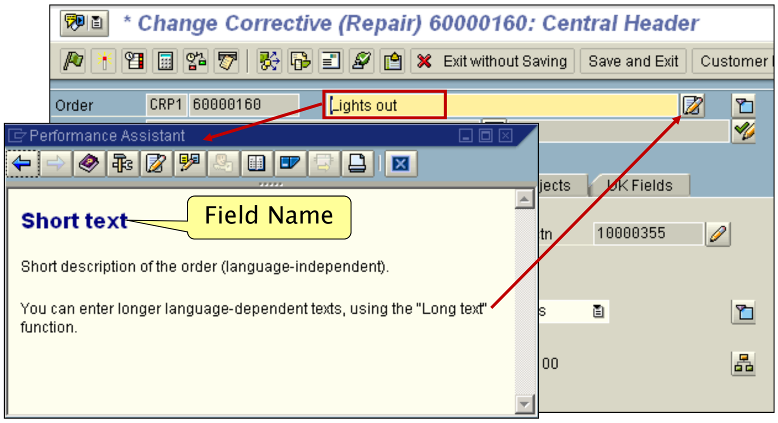
- End additional sessions by one of the following methods:
  - Click on **System → End Session** in the Menu Bar
  - Click on the “**x-box**” in the upper-right corner of the screen

- **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 <u>last</u> session open!**



Field-Level Help – F1 Key

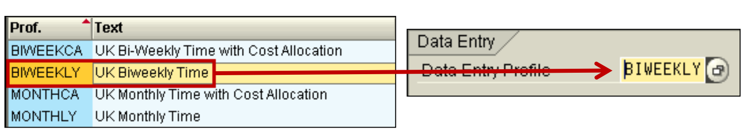
- This function provides SAP-delivered information on any field. The window will provide the full name of the field, along with a definition of and/or the purpose for the field.
- Place cursor in the desired field, then press the **F1** key.



Possible Entries Icon

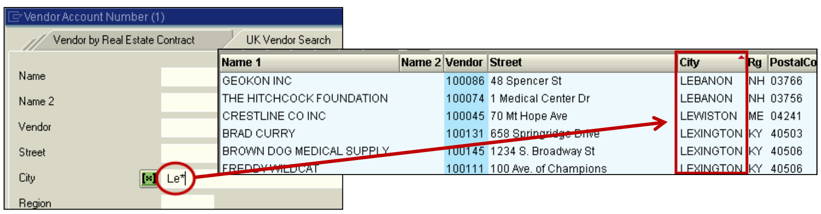
- Input fields with the **Possible Entries** icon must contain a value that is already pre-established in the system.

- 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.



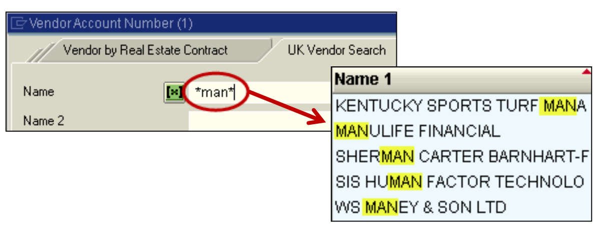
Possible Entries Icon (Continued)

- 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**.



Possible Entries Icon (Continued)

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

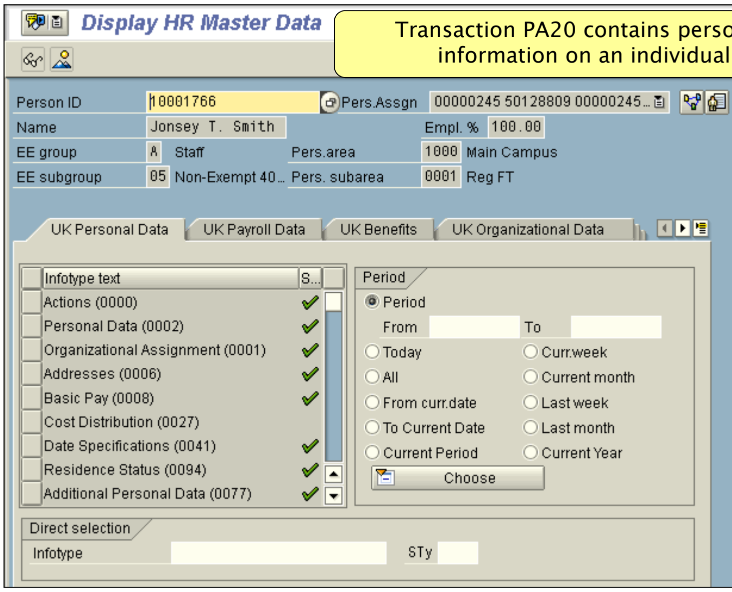


Master Data

Master Data

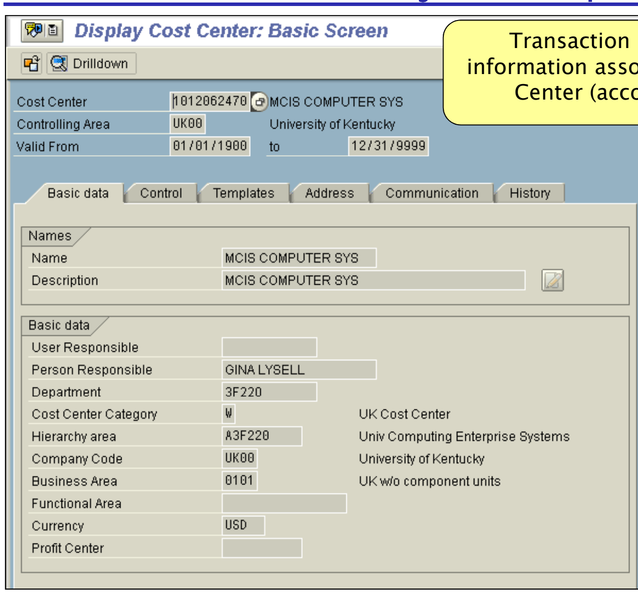
- Master data is key, “master” information entered and maintained at different organizational levels in IRIS.
  - Typically remains unchanged over an extended period of time
  - Contains information that is always used in the same way
  - Can be used across modules/applications
  - Reduces data redundancy 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



Transaction PA20 contains personnel information on an individual.

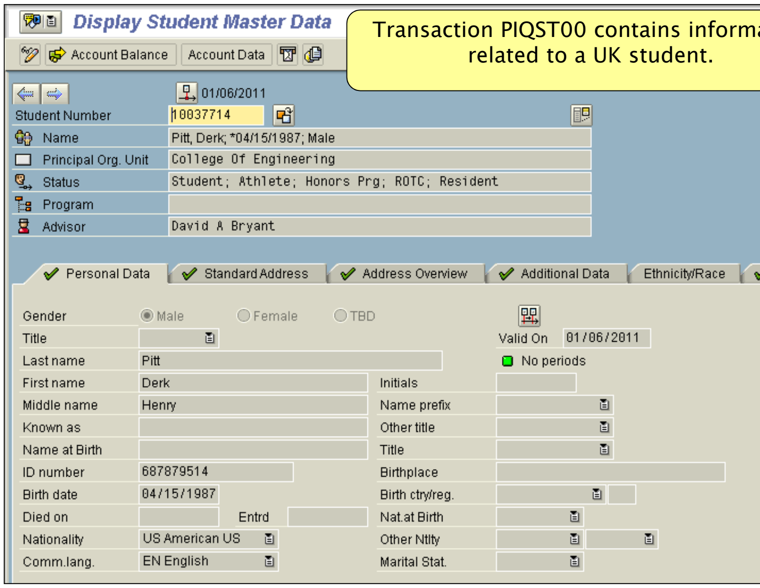
FI Master Data – Cost Object Example



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

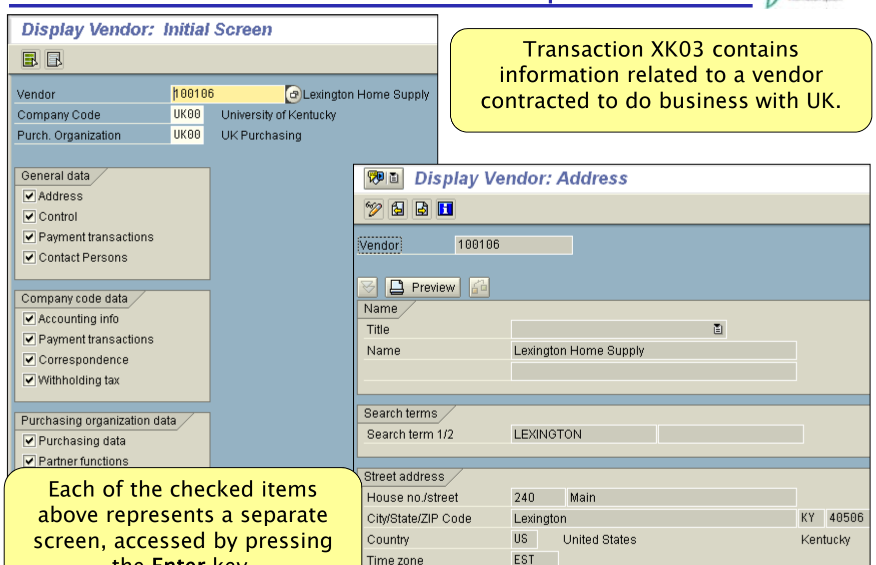
SLCM Master Data – Student Example

Transaction PIQST00 contains information related to a UK student.



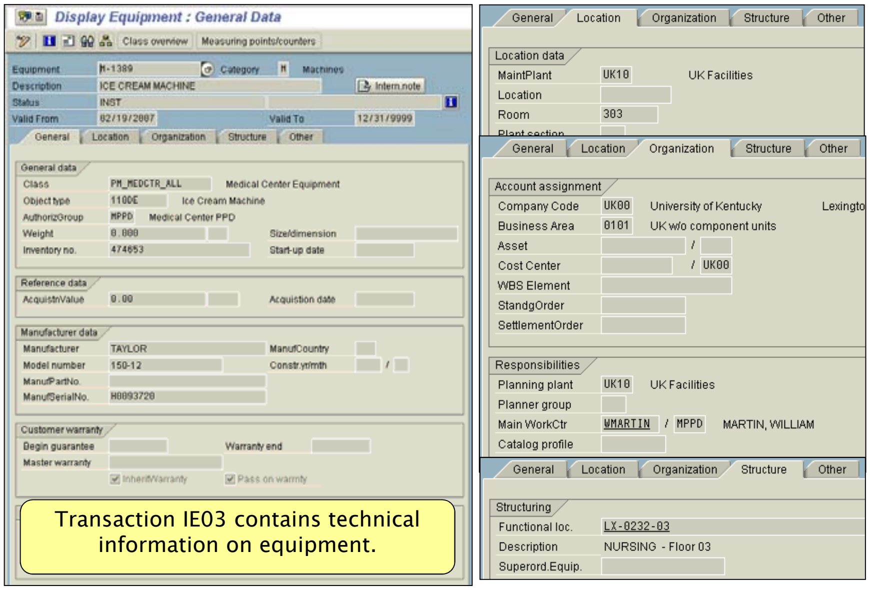
MM Master Data – Vendor Example

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

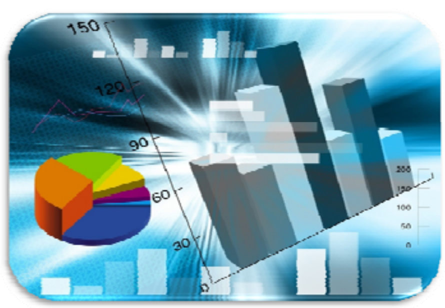


Each of the checked items above represents a separate screen, accessed by pressing the **Enter** key.

PM Master Data – Equipment Example



Transaction IE03 contains technical information on equipment.

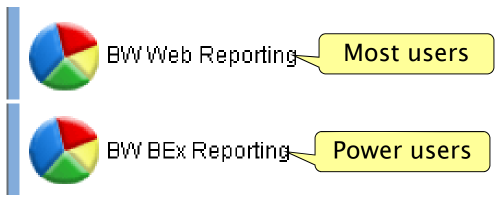


Reporting

Business Warehouse Reporting

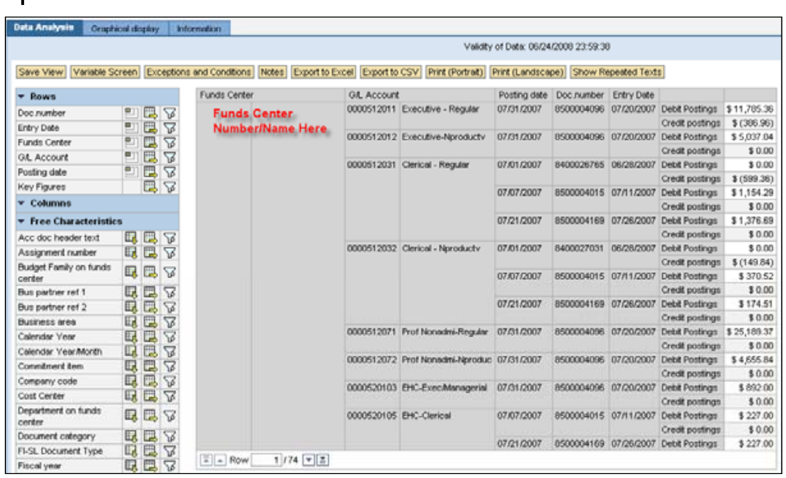
- The majority of the system reporting will be done in the Business Warehouse (BW) using a web-based user interface called Business Explorer (BEx).

- 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.

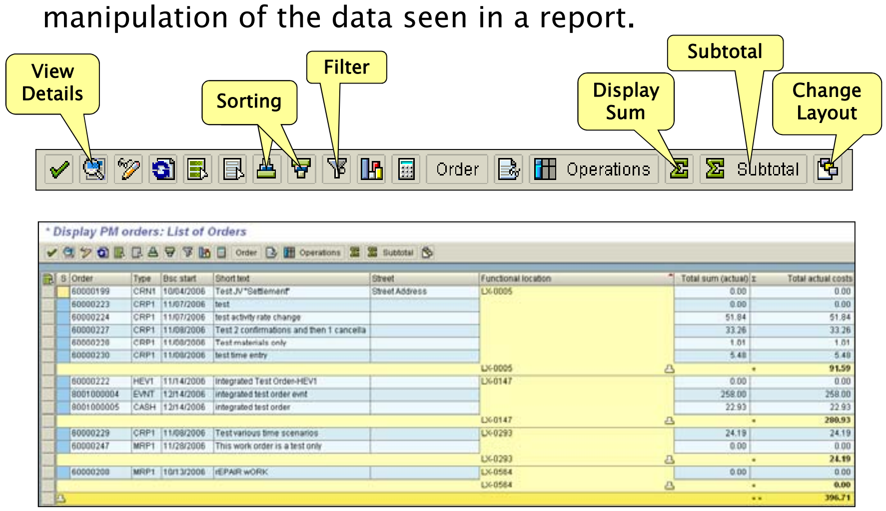


IRIS Reporting

- 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

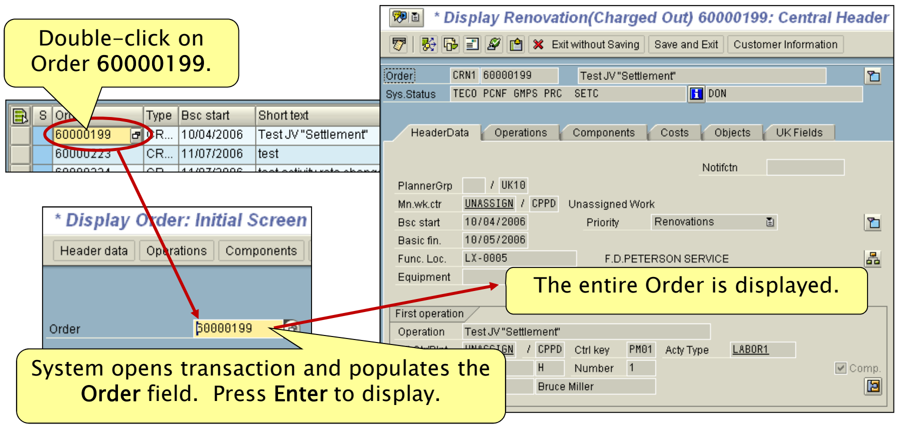
- Various icons in the Application Toolbar allow for further manipulation of the data seen in a report.



S	Order	Type	Bsc start	Short text	Street	Functional location	Total sum (actual)	Σ Total actual costs
	60000199	CRN1	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	11/08/2006	Test 2 confirmations and then 1 cancella			33.26	33.26
	60000228	CRP1	11/08/2006	Test materials only			1.01	1.01
	60000230	CRP1	11/08/2006	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			22.93	22.93
						LX-0147		• 280.93
	60000229	CRP1	11/08/2006	Test various time scenarios		LX-0293	24.19	24.19
	60000247	MRP1	11/28/2006	This work order is a test only			0.00	0.00
						LX-0293		• 24.19
	60000200	MRP1	10/13/2006	rEPAIR 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.



Unit 2
Check for Understanding

Unit 3

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
    - 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 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.

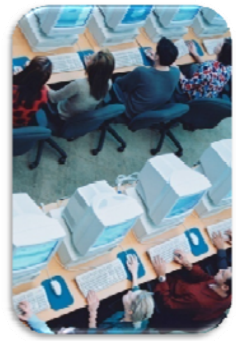
Even though a user's required courses may not be showing yet in the **Mandatory Courses** section, the user can still begin taking the courses.

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:

1 **Level 100**
IRIS Awareness & Navigation

2 **Level 200**
Overviews &
Role-Based WBTs

3 **Level 300**
Role-Based Courses

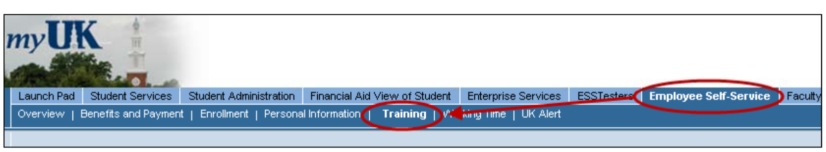
- IRIS WBT and Instructor-Led courses are open to all employees. However, only the courses on your Training Plan and the successful completion of the Level 300 course assessments will give you the access needed for your job responsibilities.

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

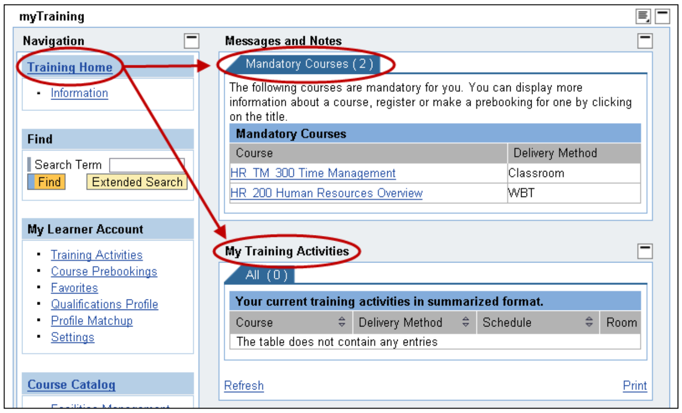
- The myTraining website contains all of the IRIS WBT and Instructor-Led courses.
- To access this website:
  1. Sign on to myUK
  2. Click on the **Employee Self-Service** tab
  3. Click on the **Training** sub-tab



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

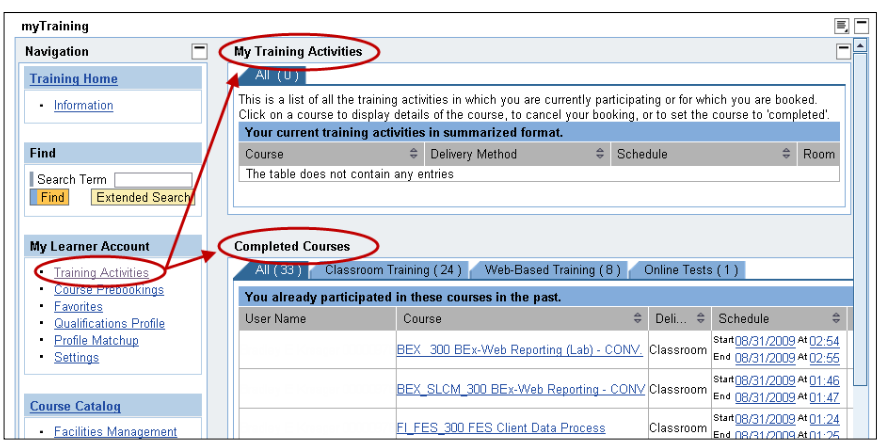
myTraining Website (Continued)

- 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.



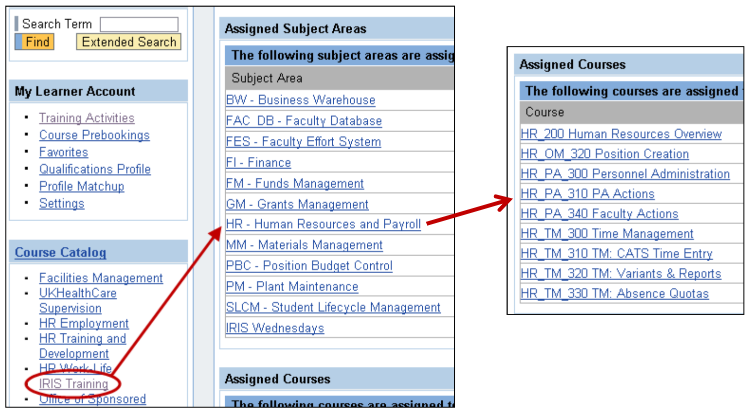
myTraining Website (Continued)

- 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.**



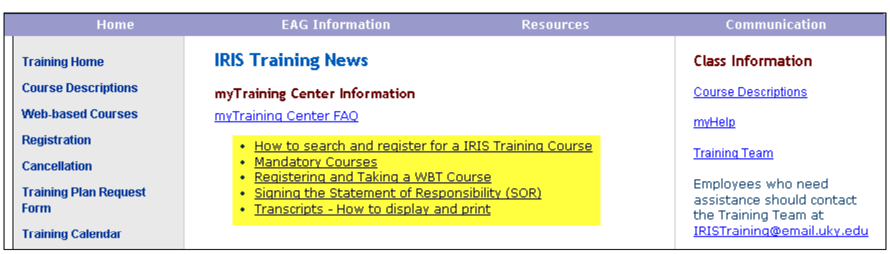
myTraining Website (Continued)

- 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.



myTraining Center Information

- Visit the IRIS Training website (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.



- Send an e-mail to 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 Finance course.
  - HR_TM_310 is a Level 300 Human Resources course covering Time Management.
  - HR_PA_300 is a prerequisite for HR_PA_310, since 300 comes before 310.
  - SLCM_AD_310 is an Administrative, Level 300 Student Lifecycle Management 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:

- HR Overview
- UK 100

The prerequisite courses for participating in this course are:

- HR_PA_300 Personnel Administration (Classroom Training)

- 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.

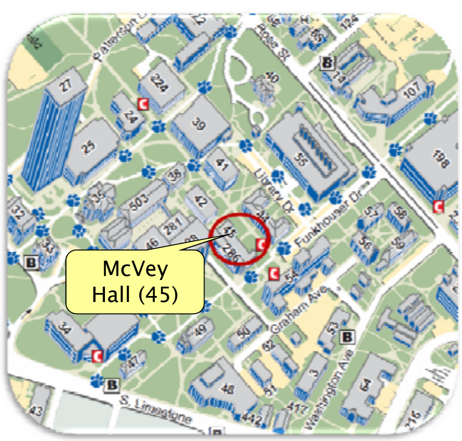
Even though the prerequisite courses may not be listed in order by level, they must still be taken in order by level: Starting with UK_100 → then the Level 200 Overview WBT(s) → then the Level 300 course(s).

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 2nd floor



Unit 3
Check for Understanding

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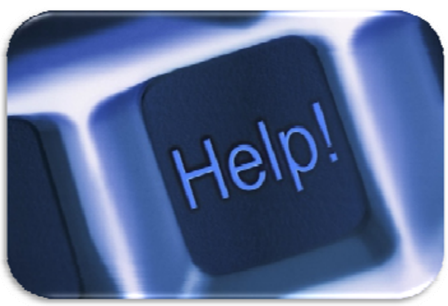
Unit 4



Help Resources

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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

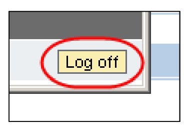
- Process and procedural documentation will be distributed in each of the Instructor-Led training courses.
- Documentation is also available on-line on the **IRIS myHelp** website.
  - Printable versions of all IRIS courses (PowerPoint and Adobe Acrobat Reader PDF formats available)
  - Quick Reference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

Technical Support

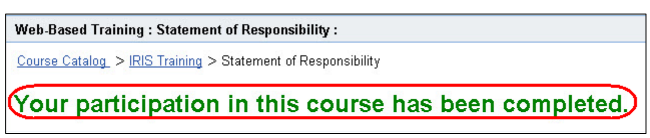
- Contact the IT Customer Service Center, (859) 218-HELP (4357), or your departmental IT personnel for any of the following reasons:
  - You need an Active Directory (link blue) ID and/or password
  - You go to the **myUK** Portal, and it is not responding
  - Your current IRIS session is suddenly terminated, 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:


Web-Based Training : Statement of Responsibility :

Course Catalog > IRIS Training > Statement of Responsibility

Your participation in this course has been completed.

You may then safely navigate away from the main page.