



IRIS Approvals





Contacts/Resources

- IRIS Helpdesk
 - irishelpdesk@tennessee.edu
- IRIS Website
 - <http://iris.tennessee.edu>



Housekeeping

- Roster/Sign-in
- Registration form (yellow)
- Class evaluations (purple)
- Parking validation
- Breaks/Restrooms/Snacks



Class Outline

- Introductions
- Overview of documentation/handouts
- Slide presentation
- Self-paced walkthrough & exercises



Objectives

- Be able to describe workflow and the approval process.
- Understand IRIS financial terms and their relation to workflow.
- Become familiar with the IRIS inbox.
- Interact with work items (approve, reject, etc.).
- Understand reviewer responsibilities.
- Create substitutes.
- Manage attachments.



What is “Workflow”

- Workflow is the method for routing documents that are entered in IRIS to the appropriate users in the system for electronic approval.
 - Routing based on funds center(s)
 - Approvers are known as “agents”
 - Agents must take action on “work items”
 - The number and levels of approvals required vary depending on work item type, campus, etc.
 - Departmental Approver
 - College Reviewer
 - Vice Chancellor Approver
 - Campus Business Office
 - Central Payroll Office
 - Vice President



What is “Workflow”, cont...

- When documents are submitted in the system, a step is initiated to release the document to workflow.
 - Method for submitting differs depending on the transaction
 - The system determines which approvals are required based on work item type, campus, etc.
 - Work items are sent to the appropriate agents for all funds centers involved
 - After all approvals, documents either post or are sent to central offices for entry



What is “Workflow”, cont...

- Examples of documents that use workflow:
 - Invoices
 - Time entry
 - Requisitions
 - Travel Expense Reports
 - HR Personnel Transactions
 - User Requests
 - Position Creations/Changes



Key Financial Terms

- Cost Center
- WBS Element
- Fund
- Funds Center
- General Ledger Account



Cost Center

- A cost center is a collector of costs and revenues for **permanent** activities of the university.
 - “E” indicates expense activities
 - “I” indicates revenue activities
 - Employees are responsible to cost centers in HR but may not be paid from cost centers
 - Examples: E051234, E029876054, I012345067



WBS Element

- A WBS element is a collector of costs and revenues for **time-delimited** activities of the university.
 - Grants
 - Contracts
 - Scholarships
 - Most WBS elements begin with an “R”
 - Example: R041234056



Fund

- A fund represents a separately budgetable source of money. A fund exists for every cost center and WBS element in the system.
- The fund number is the same as the cost center/WBS element number. The terminology differs depending on the IRIS transaction you are using.
- Examples: E119876054, R071234056



Funds Center

- A funds center represents a collection of one or more funds (cost centers and/or WBS elements).
- Funds centers always begin with “U”.
- Funds centers can be up to 10 digits in length.
- Funds centers can be broken down and classified.
Examples:
 - U01 = Budget Entity (Knoxville)
 - U0134 = Vice Chancellor (Academic Programs)
 - U013410 = College (Arts & Sciences)
 - U013410024 = Department (Chemistry)

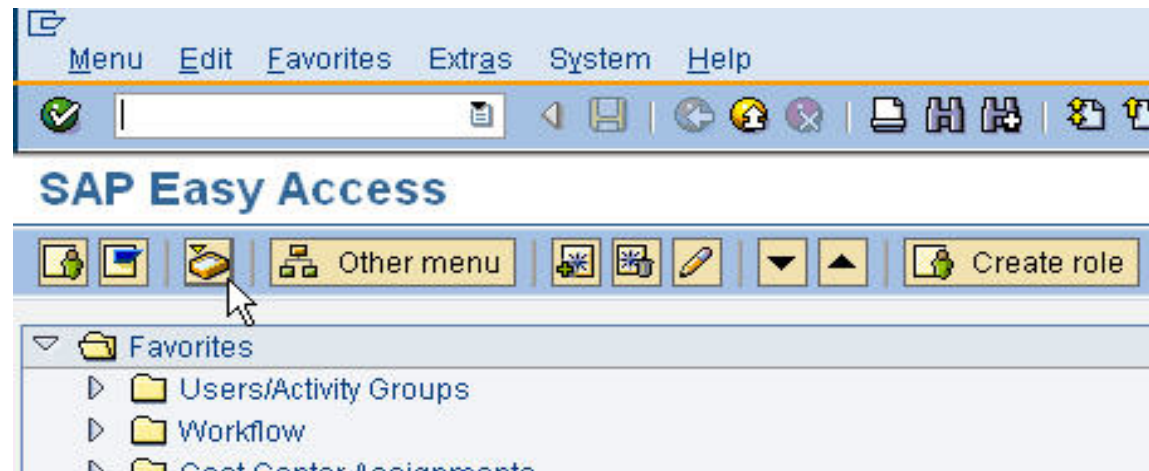


General Ledger Accounts

- A general ledger account is a code that categorizes revenue and expense activities.
- A full listing can be found on the Treasurer's Office website:
<http://www.controller.tennessee.edu>
- Examples:
 - 439100 – Supplies
 - 800001 – Rent

IRIS Inbox

- Transaction code = SBWP.
- Access from the main menu screen:

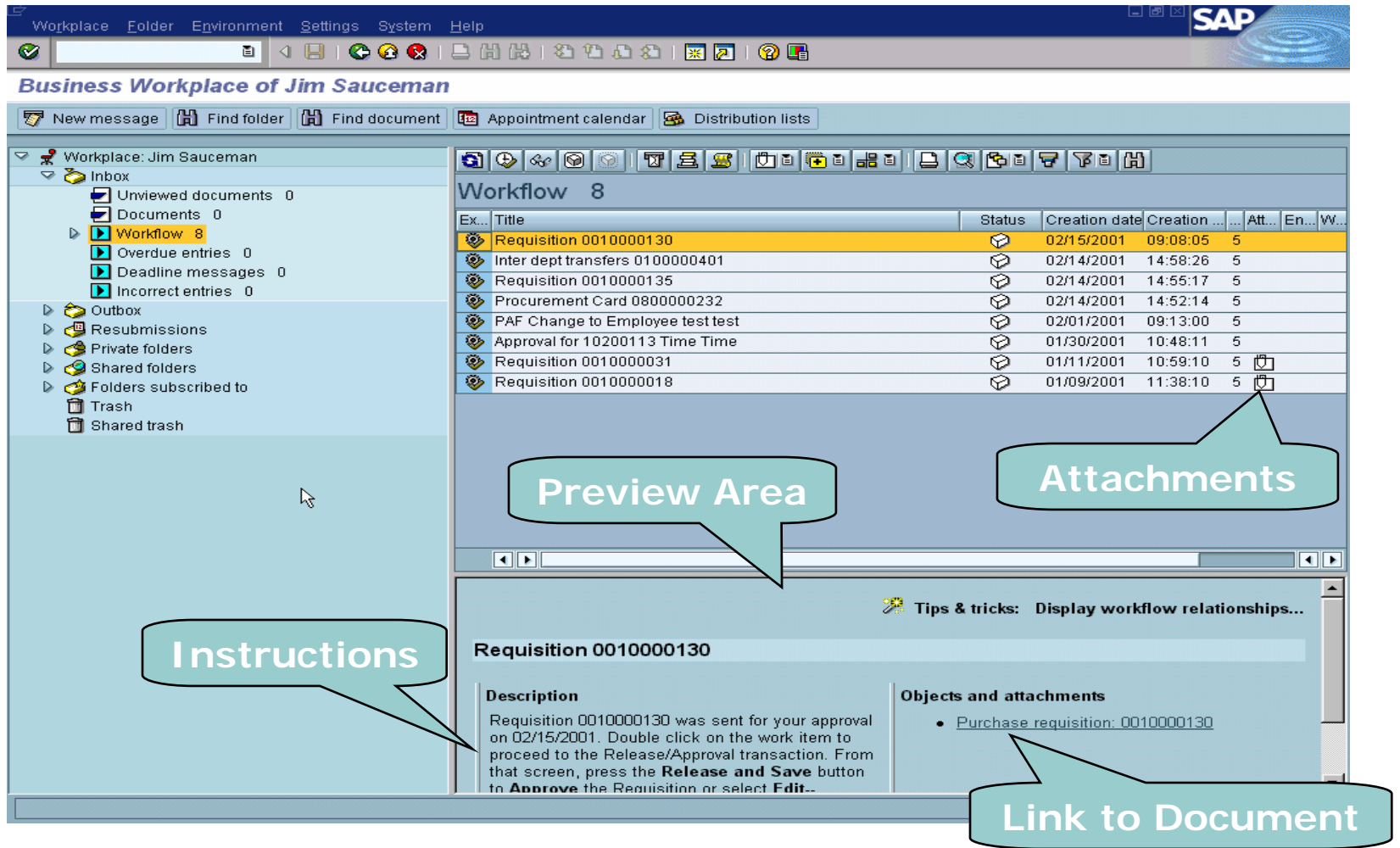




IRIS Inbox, cont...

- Access the IRIS Inbox to take the following actions on work items:
 - **Approve** – document posts or moves on for further approval
 - **Reject** – document is returned to the originator
 - **Modify** – if document has been rejected and needs correcting before resubmission (not available for all documents)
 - **Reserve** – hold the document until action can be taken
 - **Replace** – release the document back to the inboxes of other approvers if applicable
 - **Create Attachment** – will stay attached to the document in the workflow path
 - **Forward** – not recommended as it allows the recipient to approve instead of the original approver
- Ignore the “Outbox”.

IRIS Inbox, cont...



Workplace Folder Environment Settings System Help

Business Workplace of Jim Sauceman

New message Find folder Find document Appointment calendar Distribution lists

Workplace: Jim Sauceman

- Inbox
 - Unviewed documents 0
 - Documents 0
 - Workflow 8
 - Overdue entries 0
 - Deadline messages 0
 - Incorrect entries 0
- Outbox
- Resubmissions
- Private folders
- Shared folders
- Folders subscribed to
- Trash
- Shared trash

Ex...	Title	Status	Creation date	Creation ...	Att...	En...	W...
	Requisition 0010000130		02/15/2001	09:08:05	5		
	Inter dept transfers 0100000401		02/14/2001	14:58:26	5		
	Requisition 0010000135		02/14/2001	14:55:17	5		
	Procurement Card 0800000232		02/14/2001	14:52:14	5		
	PAF Change to Employee test test		02/01/2001	09:13:00	5		
	Approval for 10200113 Time Time		01/30/2001	10:48:11	5		
	Requisition 0010000031		01/11/2001	10:59:10	5		
	Requisition 0010000018		01/09/2001	11:38:10	5		

Preview Area

Attachments

Instructions

Requisition 0010000130

Description

Requisition 0010000130 was sent for your approval on 02/15/2001. Double click on the work item to proceed to the Release/Approval transaction. From that screen, press the **Release and Save** button to **Approve** the Requisition or select **Edit...**

Objects and attachments

- [Purchase requisition: 0010000130](#)

Link to Document

Tips & tricks: Display workflow relationships...



IRIS Reviewers

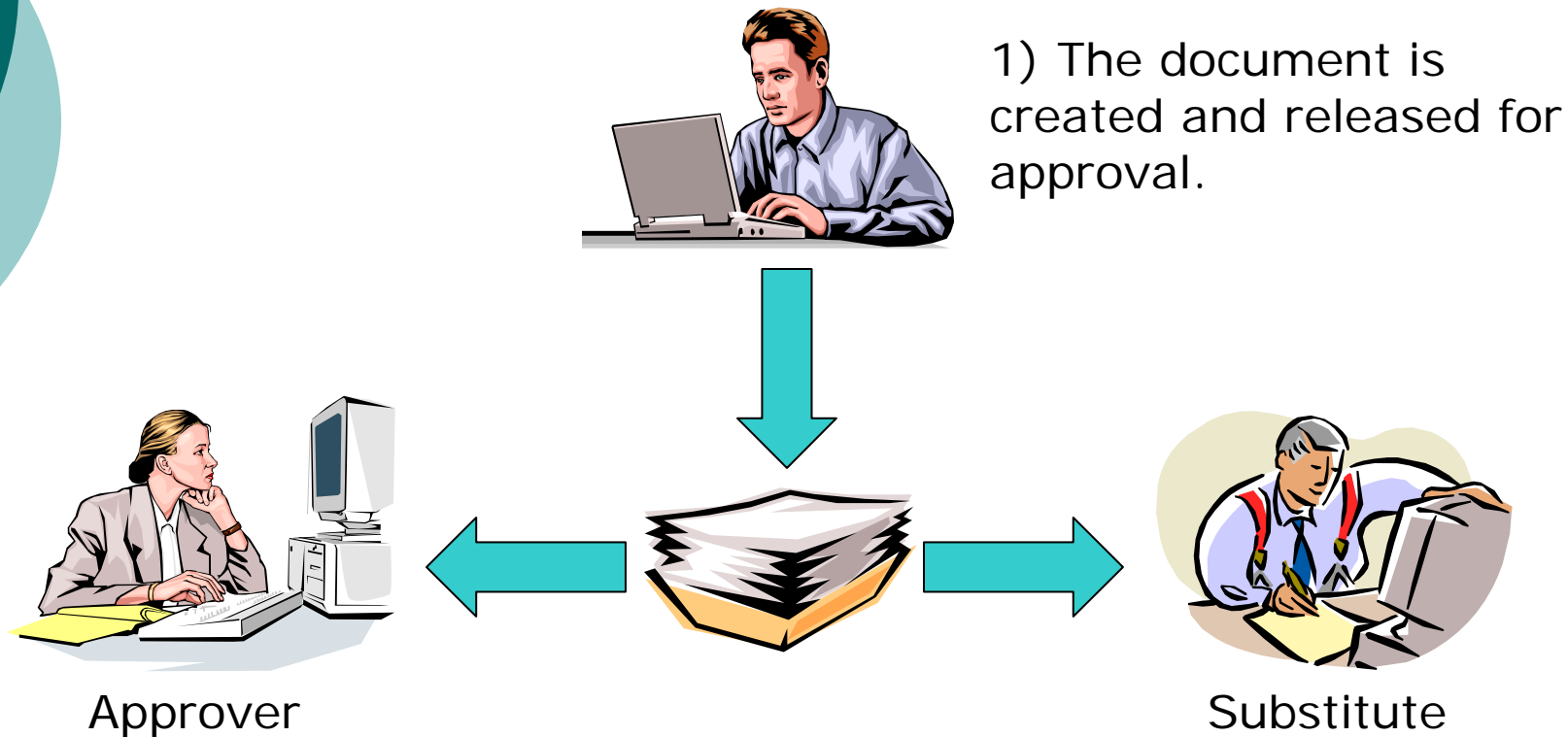
- An IRIS Reviewer has similar responsibilities to an approver, but usually validates information before the approver sees a document.
- Reviewers, like approvers, are also considered workflow “agents”.
- Reviewers must be designated in the system just like approvers.
- Departmental reviewers are not required, but can be useful, especially in larger departments.
- College and Vice Chancellor Reviewers are only valid for certain HR transactions at certain campuses.



Substitutes

- Substitutes can be assigned to take action on a primary approver's/reviewer's work items:
 - Via the IRIS Inbox
 - Via the User Request form
- Can be "permanent" or "as-needed".
- Can be time-delimited as required.
- Must meet Fiscal Policy 0150 requirements.

Permanent Substitutes



2) The work item for the document appears in the inbox of the primary agent(s) and all substitutes simultaneously.

As-Needed Substitutes



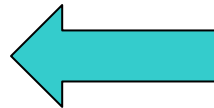
1) The document is created and released for approval.



2) The work item appears in the inbox of the primary approver **only**.



Approver



Adopt work item



Substitute

3) The work item appears in the inbox of the substitute **only after** the substitute **adopts the work item**.



Attachments

- Additional information can be attached to work items.
- The attachment “travels” with the work item through the workflow path and can be seen by others who come in contact with the work item.
- Information can be uploaded and saved as an attachment from another source (MS Word, Excel, PowerPoint, etc.).



Miscellaneous

- “Approver” vs. “Department Head”
- Email notifications (4:00 PM Eastern)
 - <https://directory.utk.edu>
- User Request transaction
 - ZSEDEPTAUTH000 (Located on the menu under *IRIS User Tools >> User Access*)
- Other useful transactions:
 - ZWF_HISTORY
 - ZAPPS
 - ZSUBS



Accessing IRIS...

- ...in class:
 - IRIS Training System (TRN)
 - Client 220

- ...at your own desk:
 - SAP Graphical User Interface (SAPGui) – download required
 - Web SAPGui – no download required
 - Both available from <http://utap.tennessee.edu>
 - Both require login with NetID and password