CAYMAN ISLANDS GOVERNMENT

IRIS 101:

A BASIC INTRODUCTION TO IRIS AND ITS NAVIGATION

INSTRUCTOR: RICARDO ROACH

CONTENTS

1. COURSE OUTLINE

IRIS 101

Objectives:

- To understand access and navigate the IRIS system

Audience: All IRIS Users

Pre-requisites:

- Basic Understanding of Microsoft Windows Navigation
- Authorized IRIS Access

Topics Covered:

1. What is IRIS?
2. How to Access IRIS
3. IRIS Homepage
4. Intro to iTRN, iUAT and CIPR
5. Logging into IRIS
6. IRIS Navigation
   6.1. IRIS Responsibilities and how do they work
   6.2. IRIS Application Toolbar
   6.3. Top 10 List of Most Used Functions
   6.4. Data Entry Mode
   6.5. Query Mode
   6.6. List of Values Button and its Usage
7. Submitting Reports
8. Viewing and Printing Reports
9. Setting your default printer
10. Setting up Favourites in the Oracle E-Business Suite Html screen
11. Exiting Oracle Applications
12. Web ADI Overview
13. Oracle Journal Entry

Multiple Choice Mini Test

This is an opportunity for the attendee to evaluate the skills learned in the course and assess if they have achieved the course objectives.

Certification

Next Recommended Course:

IRIS Purchasing 101

2. WHAT IS IRIS?

- IRIS stands for **I**ntegrated **R**esource **I**nformation **S**ystem.

- Central Financial System used by the CIG.

- Built on the Oracle E-Business platform.

- For more information on Oracle, use Google.

3. HOW TO ACCESS IRIS

1. Start up the computer system and log on using your network password.
2. Double click on the Internet Explorer icon. If it does not open in the IRIS Home Page, you must access it by entering the address as 'iris.gov.ky' and pressing <ENTER>.

4. INTRO TO ITRN, IUAT AND CIPR

IRIS has 3 areas accessible by ALL users:

Process 1.   iTRN – Training Environment

    a.   This environment is used for training and practice.

Process 2. iUAT – User Acceptance Testing

    a.   This environment is used to test data fixes as well as future IRIS solutions.

Process 3. IRIS LIVE (CIPR) – IRIS LIVE

    a.   This environment is used for everyday government business.
    b.   IT IS NOT TO BE USED FOR ANY SORT OF TESTING

5. LOGGING INTO IRIS

1.   Enter User Name
2.   Enter Password

5.1   IRIS LANDING PAGE
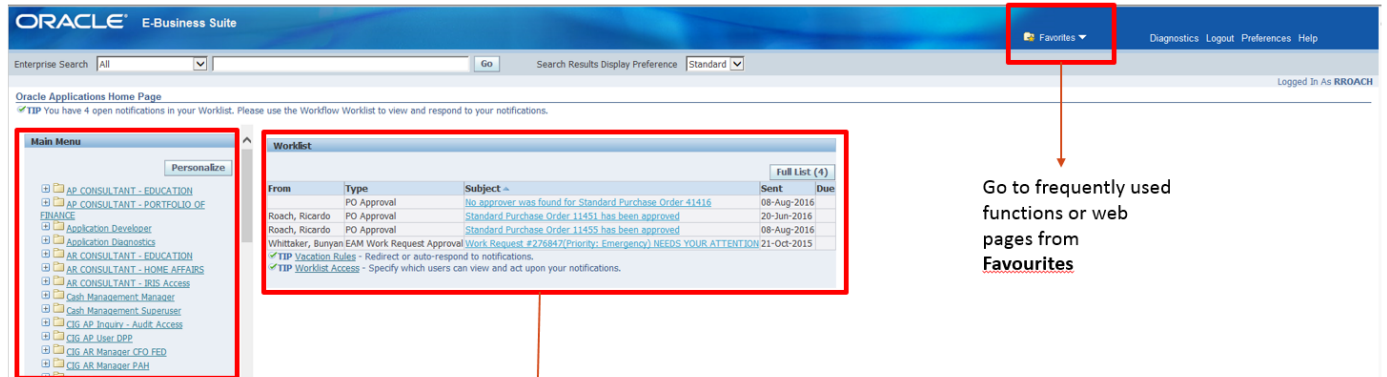
Go to frequently used functions or web pages from **Favourites**

Access IRIS functions from the **Main Menu**

View or respond to notifications from the **Worklist**

6. IRIS NAVIGATION

6.1   THE NAVIGATOR

The Navigator window displays the name of the responsibility chosen.

Use this window to perform a specific business flow. The Navigator window is always present during the session of Oracle and displays the name of the current responsibility in its title.
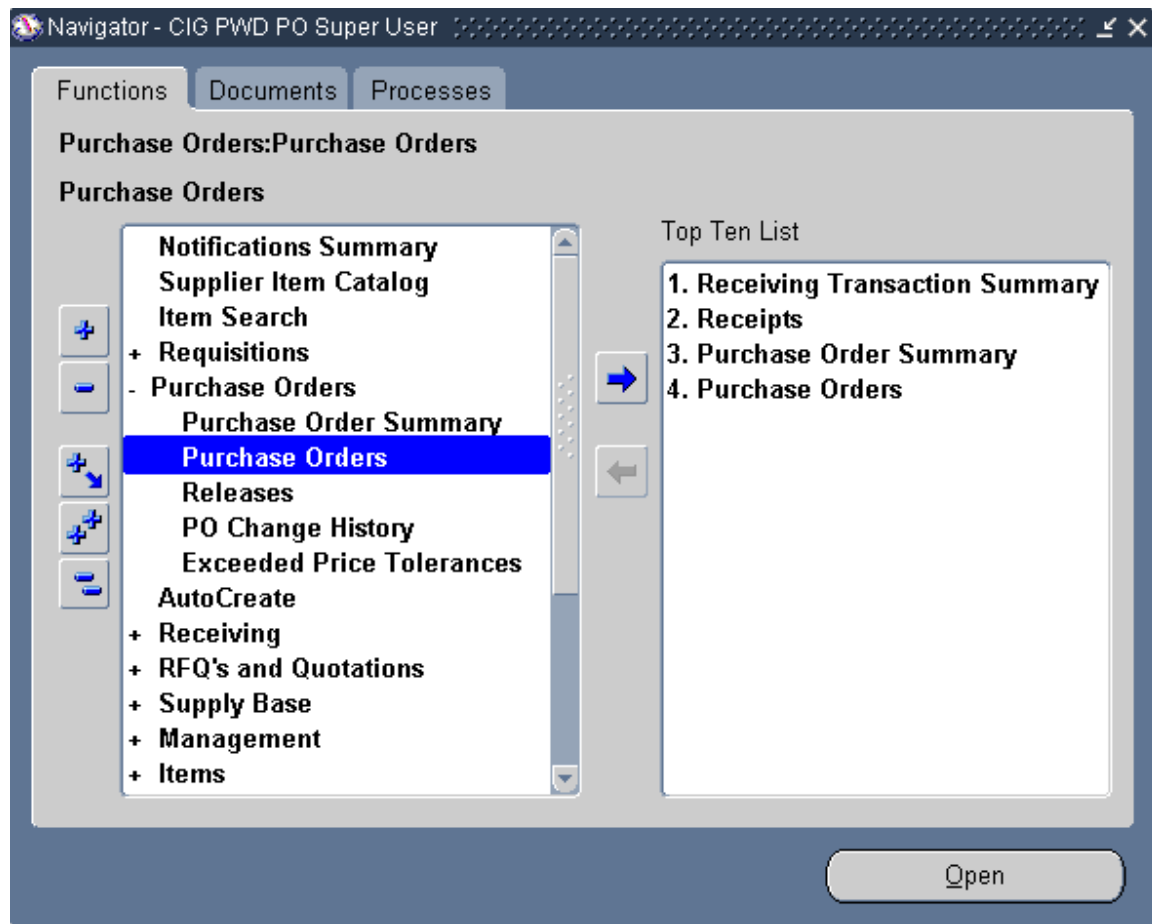
The forms that can be navigated to are displayed in a navigation list on the left side.

The navigation list is organized much like the hierarchy of a file system; expand items that begin with a plus sign **(+)** to further sublevels until the form of interest is found. Sublevels appear indented below the items from which they are expanded. Items that are expanded are preceded by a minus sign **(-)**. Expand no further when an item displays neither a plus or minus sign.

Each window opened requires a certain amount of computing resources. If the computer is low on resources, select Tools from the toolbar then Close Other Forms to avoid wasting resources.

6.2   EXPANDING OR COLLAPSING THE NAVIGATION LIST

To Expand an Item to its Next Sublevel: Double-click the item.

- To open a level.

To Collapse an Expanded Item:

- Select the item and choose Collapse.

To expand or Collapse Several Items at Once:

- Expands all the sublevels of the currently selected item.
- Expand all sublevels of all expandable items in the navigation list.
- Collapses all currently expanded items in the navigation list.

6.3   IRIS USER TYPES

User Type defines the level of access you have and the level of permissions to access certain parts of the system.

Oracle Applications Home Page

- ⊞ 📁 Application Diagnostics
- ⊞ 📁 AR CONSULTANT - IRIS Access
- ⊞ 📁 Cash Management Superuser
- ⊞ 📁 CIG AR Manager CFO PAH
- ⊞ 📁 CIG AR Manager PAH
- ⊞ 📁 CIG AR Super User - Treasury Access
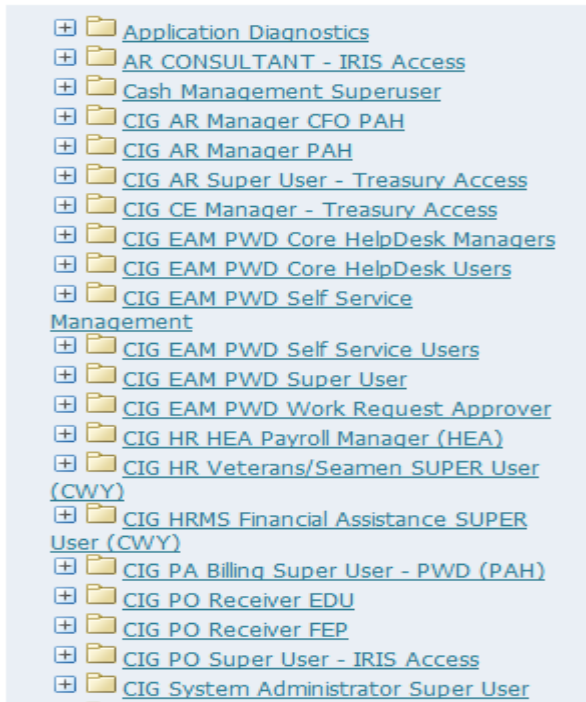- ⊞ 📁 CIG CE Manager - Treasury Access
- ⊞ 📁 CIG EAM PWD Core HelpDesk Managers
- ⊞ 📁 CIG EAM PWD Core HelpDesk Users
- ⊞ 📁 CIG EAM PWD Self Service Management
- ⊞ 📁 CIG EAM PWD Self Service Users
- ⊞ 📁 CIG EAM PWD Super User
- ⊞ 📁 CIG EAM PWD Work Request Approver
- ⊞ 📁 CIG HR HEA Payroll Manager (HEA)
- ⊞ 📁 CIG HR Veterans/Seamen SUPER User (CWY)
- ⊞ 📁 CIG HRMS Financial Assistance SUPER User (CWY)
- ⊞ 📁 CIG PA Billing Super User - PWD (PAH)
- ⊞ 📁 CIG PO Receiver EDU
- ⊞ 📁 CIG PO Receiver FEP
- ⊞ 📁 CIG PO Super User - IRIS Access
- ⊞ 📁 CIG System Administrator Super User

6.4   IRIS APPLICATIONS TOOLBAR
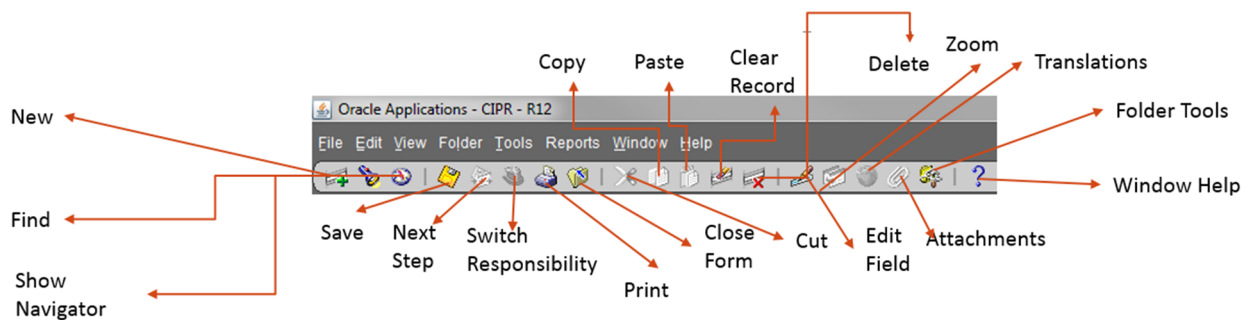
In addition to keyboard shortcuts, you can also invoke functions that are identical to specific menu items by choosing buttons from the toolbar. The toolbar replicates many commonly used menu items to invoke their actions quickly without having to search for them in the menu bar.

The toolbar is a collection of icon buttons. Each toolbar button performs a specific action when chosen.

Each toolbar button replicates a commonly used menu item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled.

Display a hint for an enabled toolbar button on the message line by moving the mouse over the button.

The toolbar generally appears below the main menu bar in the root window. The actions for these buttons replicate menu items on the Special menu, which also vary depending on the application window that is currently active. Display **Oracle Applications Library** (the help button on the toolbar) to learn more about these additional buttons and the Special menu.

6.5   TOP 10 LIST OF MOST USED FUNCTIONS

You have the ability to move 10 frequently used functions to the Top Ten List section of the navigator to further reduce the number of key strokes required to access them.

1. Navigate to (highlight but do not select) the option on the navigator that allows you to submit requests. The screen below is from one responsibility; yours may look different.
2. With this option highlighted, click the right arrow situated between the two sides of the navigator.
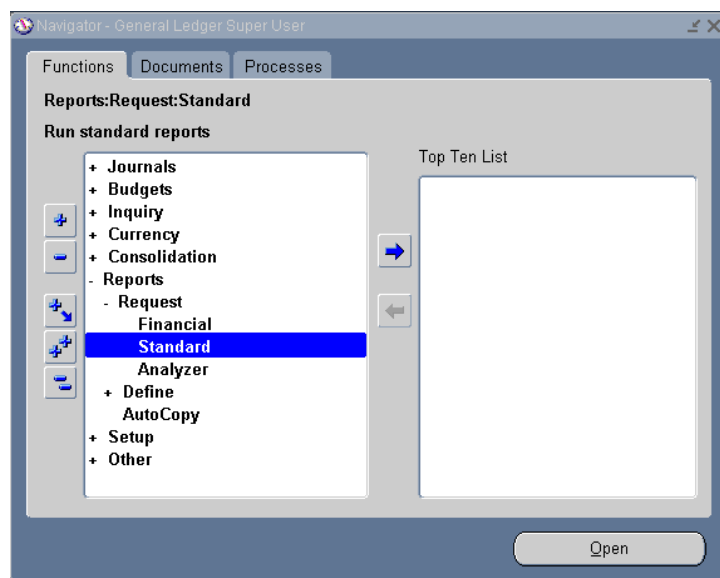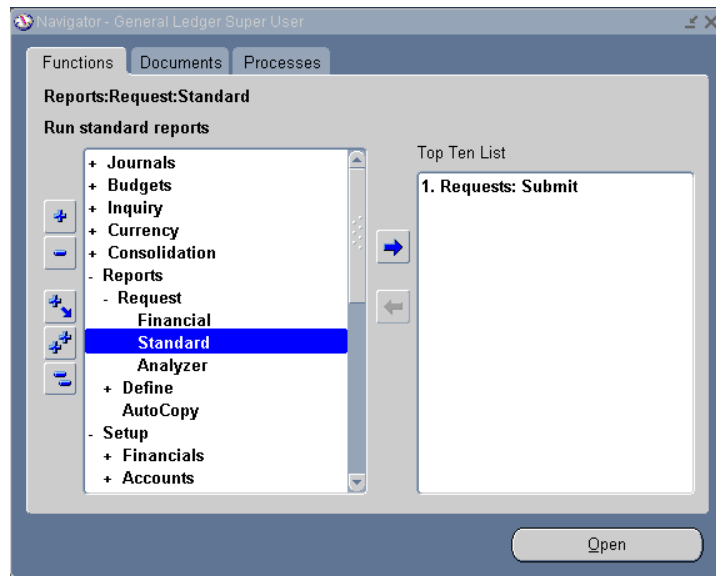
6.6   DATA ENTRY MODE (AND REQUIRED FIELDS) VS. QUERY MODE

The Oracle software was written in such a way that the same form is often used to perform data entry and also to query (search) for data previously entered.

By default, when a form first displays, it is in 'Data Entry' mode and the fields are coloured yellow and white. The fields coloured yellow are required fields and you cannot save the data without entering in these fields. The white ones may still be required by Government's procedures, but are not required by the software in order to save the data.
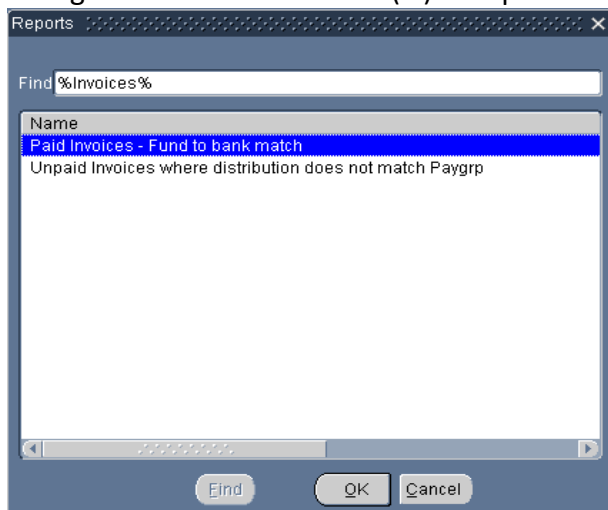
If you wish to perform a query, you can either use the shortcut key F11, or use the Menu Bar (View → Query by Example→ Enter). The fields on the form will then change to blue, which indicates you are in 'Query' mode. After entering search criteria (make use of the '%' wildcard, where possible), you can execute the query using the shortcut CTRL+F11, or the Menu Bar (View → Query by Example → Run).

If you are having trouble getting into 'Query' mode, it may be because you started to enter data, and therefore you will have to clear the record with the shortcut key F6, or the using the 'Clear Record' icon [icon] on the toolbar.

On any form, a field that is shaded in grey, whether it has a value displayed or not, cannot be edited in the field itself. It may be possible to change the value elsewhere however. For example, on the Submit Request form, the printer name is shaded in grey and therefore restricted, but it can still be modified on another form that is displayed after clicking on the Options button. You will see that later in the section on printing.

6.7   USING A LIST OF VALUES

Many fields on forms in the application have a pre-defined set of values. Such fields are indicated by a small 'LOV' icon (containing 3 dots ▦) that appears at the end of the field when you click in it. An example of one field with this property is the first field you fill in on the Submit request form (the name of the report). When you notice this icon on a field in IRIS, you can proceed in two ways: You can click on the LOV icon to view the entire list of values in a 'Find' window, or you can type a portion of the name of the desired report in the field itself, using the wildcard character (%) to represent one or more characters. If the text you type does not uniquely identify an entry in the list, the find screen will display containing only those entries that do match the text string as entered.

A list of values provides a powerful, easy-to-use data entry method that increases accuracy and productivity. It makes data entry an easy task for novice users, and power users can enter correct data with a minimum number of keystrokes.

Another feature of Oracle Applications that is similar to the LOV and is also designed to save time and reduce typing, is the 'Find' feature. When you click in a field and you notice that the torch (flashlight) 🔦 on the Toolbar is illuminated, the field in question allows you to use the find feature. This feature can be activated by either clicking on the icon or using the View → Find option on the Menu Bar. A window similar to that of the LOV will then prompt the user to enter a partial value for the field with '%' reduce the list length, or to enter only the '%' to see the entire list.

The main difference between the LOV and this Find feature is that the LOV is available mainly on fields that the users cannot enter new values in; whereas the Find feature is commonly used on fields that the users do enter new data into, such as batch numbers and therefore the lists on these are usually very long.

7. SUBMITTING REPORTS

All responsibilities have access to some type of report(s). The navigation path to the Submit Requests screen differs from one responsibility to another, but once there, that form itself functions the same for all responsibilities.

The first thing to remember that submitting a report does not automatically mean it will print. Unless you click the Options button, and change the number of copies from zero (the default) to one, it will not print. This is also where you define which printer you want the report to print on.

Until you are familiar with the reports you will be using, and how long each generally takes to complete, it would be advisable to submit requests with zero copies. The output for each request may be viewed online very easily. After submitting, use the Menu Bar and select View → Requests. Leave the 'All my requests' option selected unless you want to specify only requests of a certain name, or you know the Request ID of the specific request you want to view.

The next form displays all requests that meet the criteria and their statuses. It is quite possible that the most recently submitted requests have not yet completed. This screen does not refresh itself automatically, so when monitoring a request, you should click occasionally on the 'Refresh Data' button at the top left of the form.

Once you click on a specific request in the list, and it is a completed request, the 'View Output' button is available.

If you decide to print the report, you should ensure the correct row on the request list is still highlighted, and then select the Tools → Reprint/Republish option on the Menu Bar.
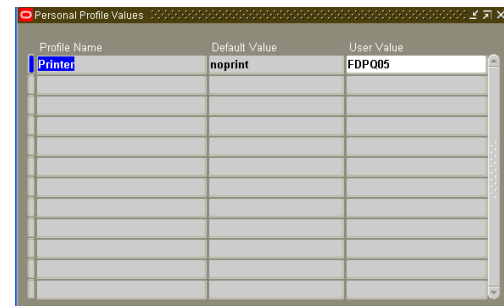
If a request should complete with a status of 'Error' you should click on 'View Log' to find the text describing the error. If it is unclear to you even after reading this, you should contact the IRIS Helpdesk for assistance (make note of the request ID and responsibility from which you ran the request). They may request that you email them the error message text.

Certain requests in IRIS require that only one request of that type may be run at a time. If your request is in a status of 'Pending' it is in the queue to be processed. You can choose Tools → Managers → Manager Queue from the Menu Bar to see where your request is in the queue.

7.1   SETTING YOUR DEFAULT PRINTER

To set your default printer in IRIS:

1. From your Menu Bar choose Edit → Preferences → Profiles to display the Personal Profile Values window.
2. Find the Printer Profile
   2.1. Press F11 on your keyboard (the Profile Name field will now be blue),
   2.2. Enter Printer in the Profile Name field
   2.3. Press Ctrl+F11 on your keyboard.
        2.3.1.1.   Or
3. Click on the Flashlight icon and type Printer, select Printer and click OK
4. In the User Value, enter the name of the printer you would like to have as your default printer.

In IRIS the printers do not have the 'NT' prefix. If you are unable to find your printer in the list, email the IRIS Helpdesk with the printer name.

7.2   SETTING UP FAVOURITES IN THE ORACLE E-BUSINESS SUITE HTML SCREEN

To hide responsibilities you no longer use;

1. Choose Edit Favorites.
2. Choose the responsibility that the function is accessed from.
3. Enter the Function Prompt if you know it and search.
4. Select the function(s) that you would like as your favourite(s) and choose Add
5. Repeat this step for other responsibilities as needed.
6. Click Apply to save your changes, or Cancel to disregard them.
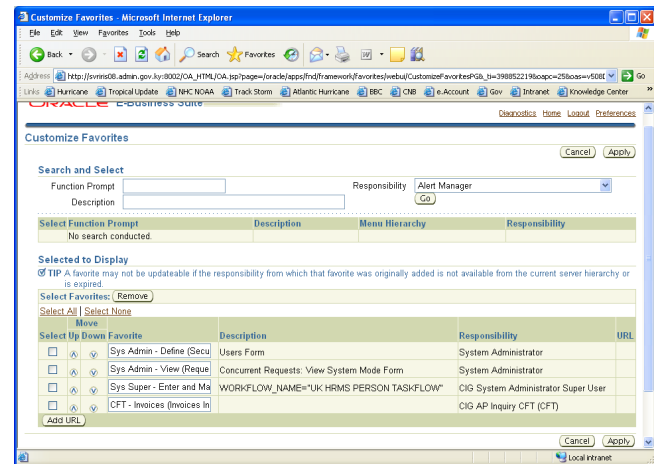
You can optionally change the order in which the favourites are displayed and/or change the display name. A good standard to have is to Prefix the prompt with the module (e.g. AP, AR, etc), and the organization it access (if you access multiple organizations).
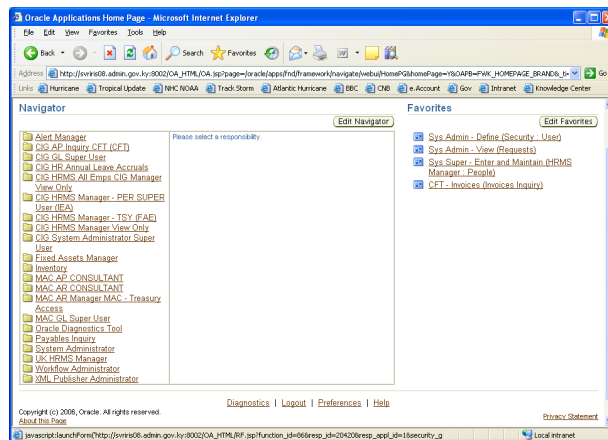
7.3   EXITING ORACLE APPLICATIONS
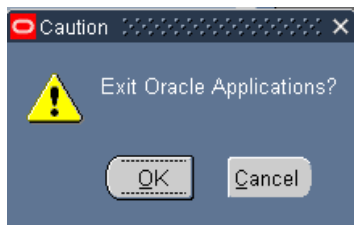
Having completed the work, choose to save or discard any unsaved work in the form(s) before exiting Oracle.

From the Menu Bar, choose File → Exit Oracle Applications or click on the red 'X' (❌) in the top right hand side of your Oracle Applications form. If there are no changes to save in the window(s), Oracle Applications exits and returns to the desktop. If you have made changes that you want to save, choose Save to save the changes before exiting. Choose Discard to Exit without saving any changes. Choose Cancel to close this window and cancel the exit.

8. WEB ADI – WEB APPLICATIONS DESKTOP INTEGRATOR

1. Oracle Web Applications Desktop Integrator brings EBS functionality to the desktop where the familiar Microsoft applications (such as Excel) can be used to complete your Oracle E-Business Suite tasks

2. Key Features:

    2.1. Works Via Internet

    2.2. Presents Oracle EBS Data in a Spreadsheet Interface

    2.3. Validates Data

    2.4. Enables Customizations

    2.5. Automatically Imports Data

3. WEB ADI integration with Excel enables you to bring your data to a spreadsheet where you can create formatted spreadsheets on your desktop allowing you to:

    3.1. Download, view, edit, and create EBS data

    3.2. Use data entry shortcuts (copying and pasting or dragging and dropping ranges of cells) to save time

    3.3. Use Excel formulas to calculate amounts

    3.4. Combine speed and accuracy by invoking lists of values for fields within the spreadsheet

    3.5. Use Web ADI validation functionality to validate the data before uploading it to IRIS (validation messages are returned to the spreadsheet, allowing you to identify and correct invalid data)

4. The task you perform on the desktop is determined by the integrator you select in Web ADI and each seeded integrator is delivered with the EBS product that provides the functionality being integrated with the desktop

5. Additional information specific to each seeded integrator can be found in the product-specific course/documentation (only if applicable)

6. Please refer to Appendix A (IRIS 101 manual) for additional information on topics related to Web ADI:

    6.1. PC configuration settings required to use Web ADI (internet browser and Microsoft Excel)

    6.2. Frequently Asked Questions

APPENDIX A

CLIENT PC CONFIGURATION FOR ORACLE WEB APPLICATIONS DESKTOP INTEGRATOR (WEB ADI)

The main issues are related to the Microsoft Office or the Browsers not configured correctly to meet the Web ADI requirements.

Browser: For the Browsers, to create an Excel spreadsheet on your desktop through Web ADI, the **'Initialize and script Active X controls not marked as safe'** setting must be set to **'Prompt'**.

This is only defaulted to this value on a 'Low' security setting', therefore you will probably need to alter this setting through Internet Explorers Custom Settings option as follows;

Navigate to IRIS homepage and login (This ensures that correct Internet Explorer security zone is configured).

Select Tools -> Internet Options -> Security tab from the Internet Explorer Menu Bar. Select the default security zone (likely Local intranet but it could be Trusted sites) and click the 'Custom Level' button. You can then set the value as recommended.
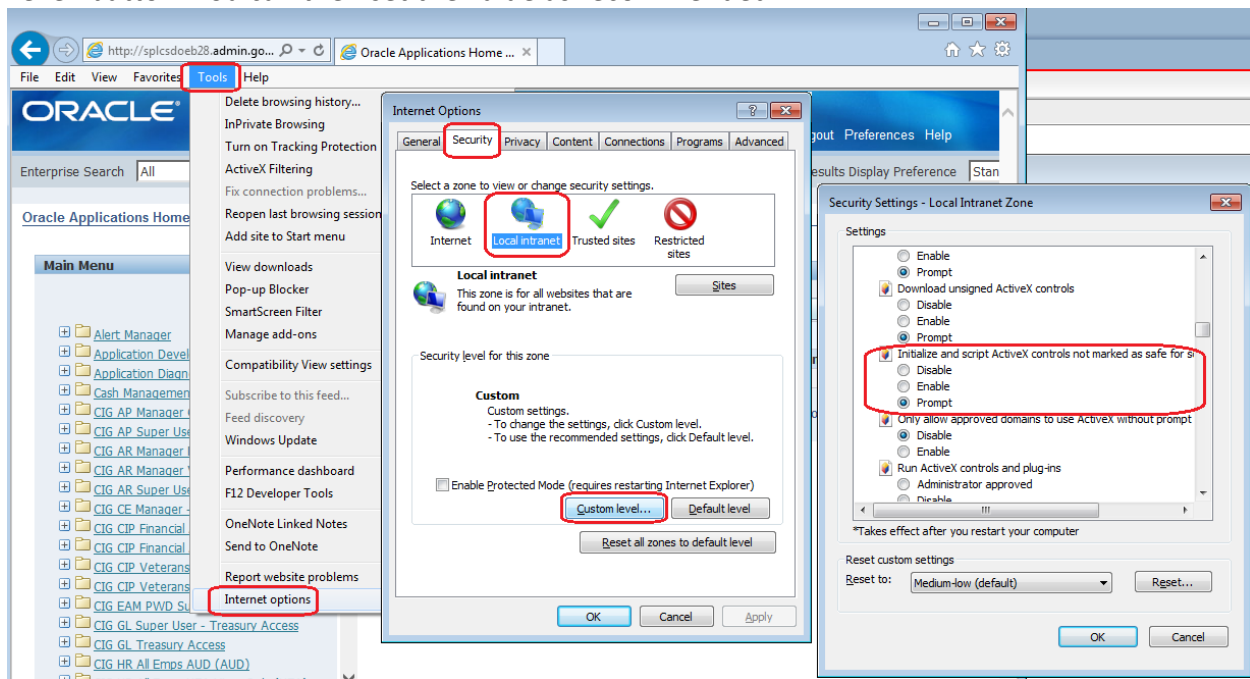
Microsoft Excel: Changing Macro Security Settings

| Excel XP/2003	Excel 2007	Excel 2010
1. In Excel, from the Tools menu, select Macro, then Security, then Security Level. 2. Select the "Medium" option. 3. Select the Trusted Sources tab. 4. Select the "Trust access to Visual Basic Project" option.	1. Click the Office Button (top-left button in the window) 2. Click the 'Excel Options' button. 3. Click 'Trust Center' link from the menu on the left. 4. Click 'Trust Center Settings...' button. 5. In the 'Trust Center' window click 'Macro Settings' link from the menu on the left. 6. Under 'Macro Settings' check 'Disable all macros with notification'. 7. Under 'Developer Macro Settings' check 'Trust Access to the VBA project object model'. 8. Click 'OK' button to close the 'Trust Center' window. 9. Click 'OK' button to return to the spreadsheet.	1. Click File -> Options 2. Click 'Trust Center' link in the 'Excel Options' window. 3. Click 'Trust Center Settings...' button. 4. In the 'Trust Center' window click 'Macro Settings' link from the menu on the left. 5. Under 'Macro Settings' check 'Disable all macros with notification'. 6. Under 'Developer Macro Settings' check 'Trust Access to the VBA project object model'. 7. Click 'OK' button to close the 'Trust Center' window. 8. Click 'OK' button to return to the spreadsheet.
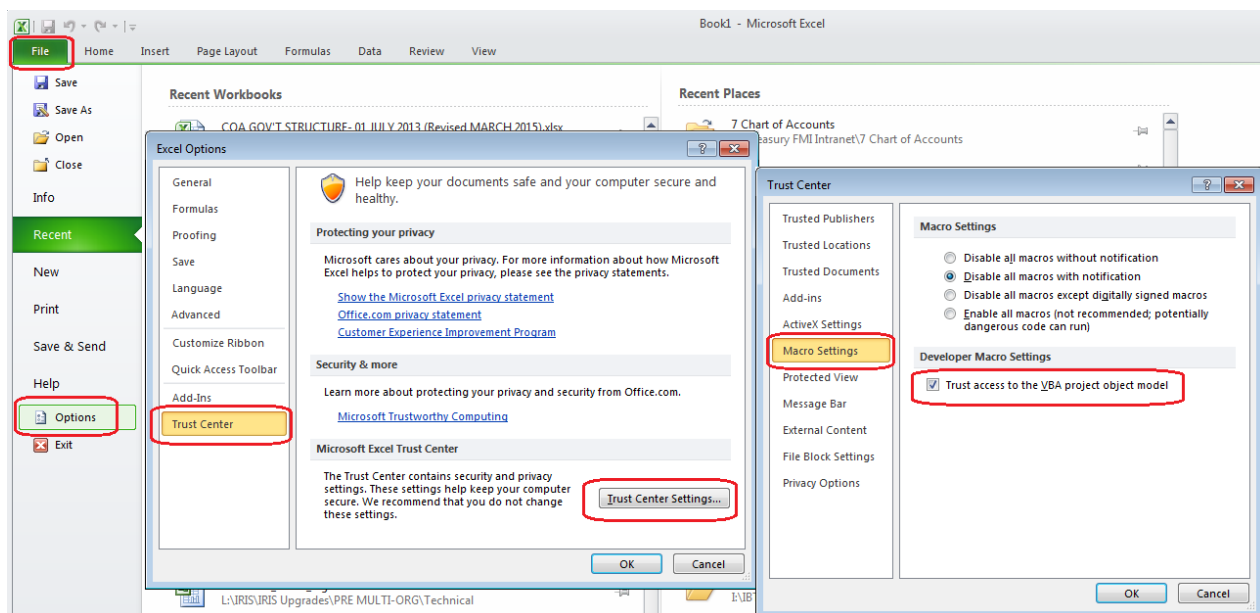
CONGRATULATIONS!

YOU HAVE COMPLETED IRIS 101 INTRODUCTION AND NAVIGATION

YOU MAY NOW MOVE ONTO IRIS PURCHASING 101