

IRIS



IRIS FALL 2017 TRAINING

For registration, visit <https://tennessee.csod.com/samldefault.aspx> Questions? Please call (865) 974-6657.

Training is subject to change at any time.

OPEN ENROLLMENT TRAINING

Class are open to all UTK employees and are free of charge unless otherwise noted.

All other UT campuses, please contact:

- Chattanooga: [Melanie Sadler](#), 423-425-4729
- Institute for Public Service: [Thaddeus Grace](#), 865-974-6198
- Martin: [Debbie Mount](#), 731-881-7104
- Memphis: [Marion Grinston](#), 901-448-5523
- Space Institute: [Courtney Maricle](#), 931-393-7267

APPROVALS

Kate Sowrey & Kathy Zelem

SEPTEMBER 14, 8:30-11:30

NOVEMBER 29, 8:30-11:30

150 Conference Ctr. Bldg.

This class covers how to complete on-line approvals in IRIS for both financial transactions and time entry.

There are no prerequisites for this class.

There is also an online option for this training class found at:

<https://irishelp.tennessee.edu/gm/folder-1.11.17046>

ASSET MANAGEMENT OVERVIEW

Verna Howard & Marilyn
Steinle

SEPTEMBER 12, 8:30-11:30

NOVEMBER 16, 8:30-11:30

150 Conference Ctr. Bldg.

This class covers the creation and maintenance of asset records, the handling of sensitive minor equipment, and the running of equipment inventory and other asset reports. This class will also cover navigation between asset records and other IRIS records, such as requisitions and purchase orders. You **MUST** have a valid user ID for the IRIS production system and know your cost center to participate in this class.

Prerequisite: Valid User ID, IRIS Overview, Basic Financial Concepts recommended.

<p>BASIC FINANCIAL CONCEPTS</p> <p>Kate Sowrey & Kathy Zelem</p> <p>AUGUST 8, 8:30-11:30 SEPTEMBER 7, 8:30-11:30 OCTOBER 5, 8:30-11:30 NOVEMBER 2, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class provides a foundation of IRIS financial information that will be beneficial before proceeding to other IRIS financial classes. Basic financial organizational and master data concepts will be covered, as well as other financial terms and concepts. An overview of IRIS financial modules and basic types of financial transactions will be provided as well. You MUST have a valid user ID for the IRIS Production system and know your responsible cost center to participate in this class. It is recommended that you complete this class before taking additional IRIS financial classes.</p> <p><u>Prerequisite:</u> IRIS Overview.</p>
<p>BASIC HR MASTER DATA</p> <p>Kathy Hinkle</p> <p>SEPTEMBER 6, 1:30-4:30 NOVEMBER 1, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class is an introduction to basic HR master data types and navigation techniques. This class will also cover basic HR terms and other HR classes that may be beneficial. It is recommended you take this class before taking additional IRIS HR classes.</p> <p><u>Prerequisite:</u> IRIS Overview, Valid User ID.</p>
<p>BASIC REPORTING FOR HR</p> <p>John Rich</p> <p>AUGUST 15, 8:30-11:30 NOVEMBER 28, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class is an introduction to basic human resources reporting for those who are new to reporting in the IRIS system. It covers how to run, print, and download HR data, as well as how to save selection criteria and save a custom layout. Topics covered include reporting on employee data, position data, time entry data, absence quotas and the payroll distribution report. You MUST have a valid user ID for the IRIS Production system and know your responsible cost center to participate in this class. Also, to get the greatest benefit from the class, you should wait to take the class until you have had at least a month's experience using the IRIS system.</p> <p><u>Prerequisite:</u> Valid User ID, one month's experience using IRIS, Basic HR Master Data recommended.</p>

<p>CASH DEPOSITS</p> <p>Joycann Lane & Dayna Tampas</p> <p>AUGUST 24, 8:30-11:30 OCTOBER 26, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to enter bank deposit information in IRIS.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>DOCUMENT TRACKING – FI</p> <p>Jenifer Huey</p> <p>SEPTEMBER 20, 8:30-4:30 NOVEMBER 9, 8:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This all-day class covers how to track all types of financial documents and find various kinds of financial information in IRIS. Topics include tracking documents in workflow, finding/viewing unposted posted documents and encumbrances, finding posted documents and payment information, finding vendor information, dealing with rejected items, and tracking budget changes. You MUST have your own IRIS user ID and password to participate in this class. Also, you must have been an IRIS user for at least one month. To get the greatest benefit from the class, you should bring several of your own document numbers and fund numbers with you.</p> <p><u>Prerequisite:</u> Valid User ID, one month’s experience using IRIS, Basic Financial Concepts recommended.</p>
<p>DOCUMENT TRACKING - HR AND TRAVEL</p> <p>Jenifer Huey</p> <p>SEPTEMBER 26, 1:30-4:30 NOVEMBER 30, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This new half-day class covers how to find various types of human resource and travel information in IRIS. Topics include using the Object Manager in the PA20 transaction, tracking position/salary information, tracking time entry, reporting on absence quotas, tracking payroll information, finding travel payments, reporting on travel. You MUST have your own IRIS user ID and password to participate in this class. Also, you must have been an IRIS user for at least one month. To get the greatest benefit from the class, you should bring several of your own fund numbers with you.</p> <p><u>Prerequisite:</u> Valid User ID, one month’s experience using IRIS, Document Tracking – FI recommended.</p>

<p>EFFORT CERTIFICATION REPORTS</p> <p>Jay Taylor</p> <p>SEPTEMBER 28, 9:00-11:00</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class is designed for the staff who either enter monthly certification information for their department or who are the central contact person to help faculty, staff, or students enter their personal ECRs. The class covers the basics of how to enter the information and also some of the policy involved.</p> <p><u>Prerequisite:</u> None, Basic Financial Concepts recommended.</p>
<p>ELECTRONIC LEDGER RECONCILIATION</p> <p>Teresa Winters, Ami McBride, & Kathy Zelem</p> <p>SEPTEMBER 27, 1:30-4:30 NOVEMBER 14, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class demonstrates how to reconcile ledgers using the new Electronic Ledger Reconciliation tool that is available from ZFM_UT_LEDGER. This class also covers tips on preparing for the reconciliation ahead of time as well as tools that can be used for tracking and managing reconciliations. This tool is not used to reconcile A funds. Also, this class does not cover the content represented in the original ledger report; if the user does not have a familiarity with the University ledger, it is recommended to take the Working with Departmental Ledgers class.</p> <p><u>Prerequisite:</u> Valid User ID, one month's experience using IRIS, Overview, Basic Financial Concepts recommended, Working with Departmental Ledgers recommended, or familiarity with reconciling ledgers.</p>
<p>FUNDS RESERVATIONS</p> <p>Mark Hall</p> <p>SEPTEMBER 14, 1:30-4:30 NOVEMBER 8, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This is a class which covers how to interpret funds reservations on reports and how to use funds reservations to help manage the balances of WBS elements and cost centers.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>INTERNAL ORDERS</p> <p>Jenifer Huey</p> <p>OCTOBER 5, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers the use of internal orders in IRIS. Internal orders can be powerful tools for managing funds within cost centers or WBS elements. Topics include creating and managing internal orders, reporting on internal orders, and the posting and/or re-posting of IRIS transactions to internal orders.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>

<p>INTERNAL TRANSFERS</p> <p>Jenifer Huey</p> <p>AUGUST 29, 1:30-4:30 OCTOBER 17, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to move expenditures from one cost center or WBS element to another cost center or WBS element. Topics covered include internal transfers, which are used to move operating expenses (FB50) and salary transfer vouchers (STVs), which are used to move salary expenditures (ZPSTV000).</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>INVOICES</p> <p>Teresa Ford</p> <p>SEPTEMBER 13, 8:30-4:30 NOVEMBER 15, 8:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>Now an all-day class! The class covers invoice entry in ZAP_ENTRY and MIR7, including standard invoice and credit memo, miscellaneous reimbursements, invoices and credit memos against contracts, invoices for T-27s, moving allowances, and invoices and credit memos against purchase orders and framework orders.</p> <p><u>Prerequisite:</u> IRIS Overview, Requesting Vendor Records for Invoice Payment, Basic Financial Concepts recommended.</p>
<p>OVERVIEW</p> <p>Diane McNeil</p> <p>AUGUST 1, 8:30-11:30 SEPTEMBER 6, 8:30-11:30 OCTOBER 3, 8:30-11:30 NOVEMBER 1, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class is for those who are new to IRIS. It includes an introduction to the IRIS training materials and instructions on how to navigate in the system and how to search for and display information. It does not teach specific IRIS transactions but provides the user with the skills needed when beginning to use IRIS and for taking other IRIS classes. The Overview is the prerequisite to all other regularly-scheduled IRIS classes (except the Approvals class).</p> <p><u>Prerequisite:</u> None.</p> <p>There is also an online option for this training class. Found at https://irishelp.tennessee.edu/gm/folder-1.11.17046.</p>
<p>PAYROLL ENCUMBRANCES</p> <p>Jenifer Huey</p> <p>SEPTEMBER 21, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to interpret the reports and manage the encumbrances of your WBS elements.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>

<p>PROCUREMENT CARDS</p> <p>James Hodge & Susan Wilson</p> <p>SEPTEMBER 12, 1:30-4:30 NOVEMBER 2, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to reconcile the monthly procurement card statements on IRIS.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>PURCHASING</p> <p>Donna Holton & Jackie Haun</p> <p>AUGUST 10, 1:30-4:30 OCTOBER 10, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to complete purchase requisitions in IRIS.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>REQUESTING VENDOR RECORDS FOR INVOICE PAYMENTS</p> <p>Karen Shipley</p> <p>SEPTEMBER 7, 1:00-3:00 NOVEMBER 8, 1:00-3:00</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers policies and procedures on vendor requests for invoice payment. Topics covered include determining if a new vendor request is needed, the process for domestic vendors, the process for foreign vendors, and reviewing all applicable forms. The class will primarily be lecture-based, but a portion of the class will hands-on covering searching and display of vendor records in the IRIS production system. Therefore, students should have an IRIS production ID before attending this class.</p> <p><u>Prerequisite:</u> Valid User ID, IRIS Overview.</p>
<p>TIME ENTRY</p> <p>Pam Quick</p> <p>SEPTEMBER 26, 8:30-11:30 NOVEMBER 7, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers how to enter absence and attendance information in IRIS for both biweekly and monthly employees.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>

<p>TRAVEL</p> <p>Kate Sowrey</p> <p>AUGUST 17, 8:30-4:30 SEPTEMBER 19, 8:30-4:30 OCTOBER 25, 8:30-4:30 NOVEMBER 21, 8:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class is an introduction to the IRIS Travel System. It is a full-day class with instruction in the morning and lab exercises in the afternoon. The morning segment covers how to enter Travel Requests (authorizations) and Travel Expense Reports (reimbursement requests) in IRIS. The topics to be covered include initial settings in IRIS for using the TRIP transaction, entering a basic Travel Request and Travel Expense Report, adding comments, additional destinations, and alternative cost assignments, information on how to handle expense per diems and individual expense receipt types, and how to complete travel documents for guest travelers and group travel. The session also includes instruction on how to resubmit a revised Travel Expense Report, handle a rejected or adjusted Travel Expense Report, find out the status of the reimbursement payment, and request a personnel number for a guest traveler. The morning segment will be hands-on with the students following along with the instructor. Afternoon time will allow for additional hands-on experience with class exercises and examples of specific travel issues.</p> <p><u>Prerequisite:</u> IRIS Overview, Basic Financial Concepts recommended.</p>
<p>USING REPORTS TO MANAGE YOUR FUNDS</p> <p>Denise Haley & Lydia Ruth</p> <p>AUGUST 9, 8:30-11:30 SEPTEMBER 21, 8:30-11:30 NOVEMBER 7, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class builds upon the foundation begun in the “Working with Departmental Ledgers” class but whereas the Ledgers class covers reporting for audit compliance, this class covers reporting to analyze, track, and manage your funds. Among the reports that it covers are the Budget Control System reports (ZFM_BCS001 and others), actuals line item reports (FMRP_RFFMEP1AX – All Postings, FMRP_RFFMEP1FX – FI Postings), and reports for viewing fund attributes (for example, Z_FM_ZFMFINCOD). You MUST have a valid user ID for the IRIS Production system and know your cost center or WBS element number to participate in this class. Also, to get the greatest benefit from the class, you should wait to take the class until you have had at least a month's experience using the IRIS system.</p> <p><u>Prerequisite:</u> Valid User ID, one month's experience using IRIS, Basic Financial Concepts recommended.</p>

<p>USING REPORTS TO MANAGE YOUR WBS ELEMENTS</p> <p>Mary McDonald</p> <p>AUGUST 16, 8:30-11:30 SEPTEMBER 28, 1:30-4:30 NOVEMBER 16, 1:30-4:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class builds upon the information from the “Using Reports to Manage Your Funds” class and goes into more detail on reports specific to WBS elements. Transactions covered include the WBS Project Builder (CJ20N), which provides master data information on the WBS element, and various other reports specific to WBS elements. You MUST have a valid user ID for the IRIS Production system and know your WBS element number to participate in this class. Also, to get the greatest benefit from the class, you should have taken the Using Reports to Manage Your Funds class and have had at least a month's experience using the IRIS system for WBS elements.</p> <p><u>Prerequisite:</u> Using Reports to Manage Your Funds, Valid User ID, one month’s experience using IRIS, Basic Financial Concepts recommended.</p>
<p>WORKING WITH DEPARTMENTAL LEDGERS</p> <p>Sherry Davis</p> <p>SEPTEMBER 27, 8:30-11:30 NOVEMBER 14, 8:30-11:30</p> <p>150 Conference Ctr. Bldg.</p>	<p>This class covers the IRIS transaction for running the new departmental ledger, ZFM_UT_LEDGER. The class will also cover an overview of the reconciliation process and why it is important to keep your reconciliations up-to-date. Please note: This class does NOT cover the Electronic Ledger Reconciliation Tool. You MUST have a valid user ID for the IRIS Production system and know your cost center or WBS element number to participate in this class.</p> <p><u>Prerequisite:</u> Valid User ID, IRIS Overview, Basic Financial Concepts recommended.</p>