The Basics

INTEGRATED RESOURCE INFORMATION SYSTEMS OVERVIEW

The Integrated Resource Information Systems (IRIS) includes these modules: Finance (FI), Human Resources/Payroll (HR), Campus Management(CM), Materials Management (MM), and Plant Maintenance (PM). Because these modules are integrated, they share data and run more efficiently than would multiple, separate systems.

The University invested in SAP software solutions to build its own IRIS components. SAP stands for **S**ystems, **A**pplications, and **P**roducts.

Campus Management (CM) is the IRIS module for student administration and student accounting. CM manages all stages in the student life cycle, including admissions, booking (registration), event planning (class scheduling), appraisal (grading), progression, academic work, and the academic calendar.

CM interfaces with other computer systems as well, among them Sigma ProSAM (Student Financial Aid), APEX (Academic Program Evaluation and Exploration, for degree audit), GRADS (Graduate School), and ASTRA (Application Software and Technical Reports for Academia).

There are two ways to access information and perform tasks in the IRIS system:

- By using the **myUK Portal**, a web site that provides easy access to information and tasks
- By using the **SAPGUI** (Graphical User Interface), a more complex method that involves transaction codes

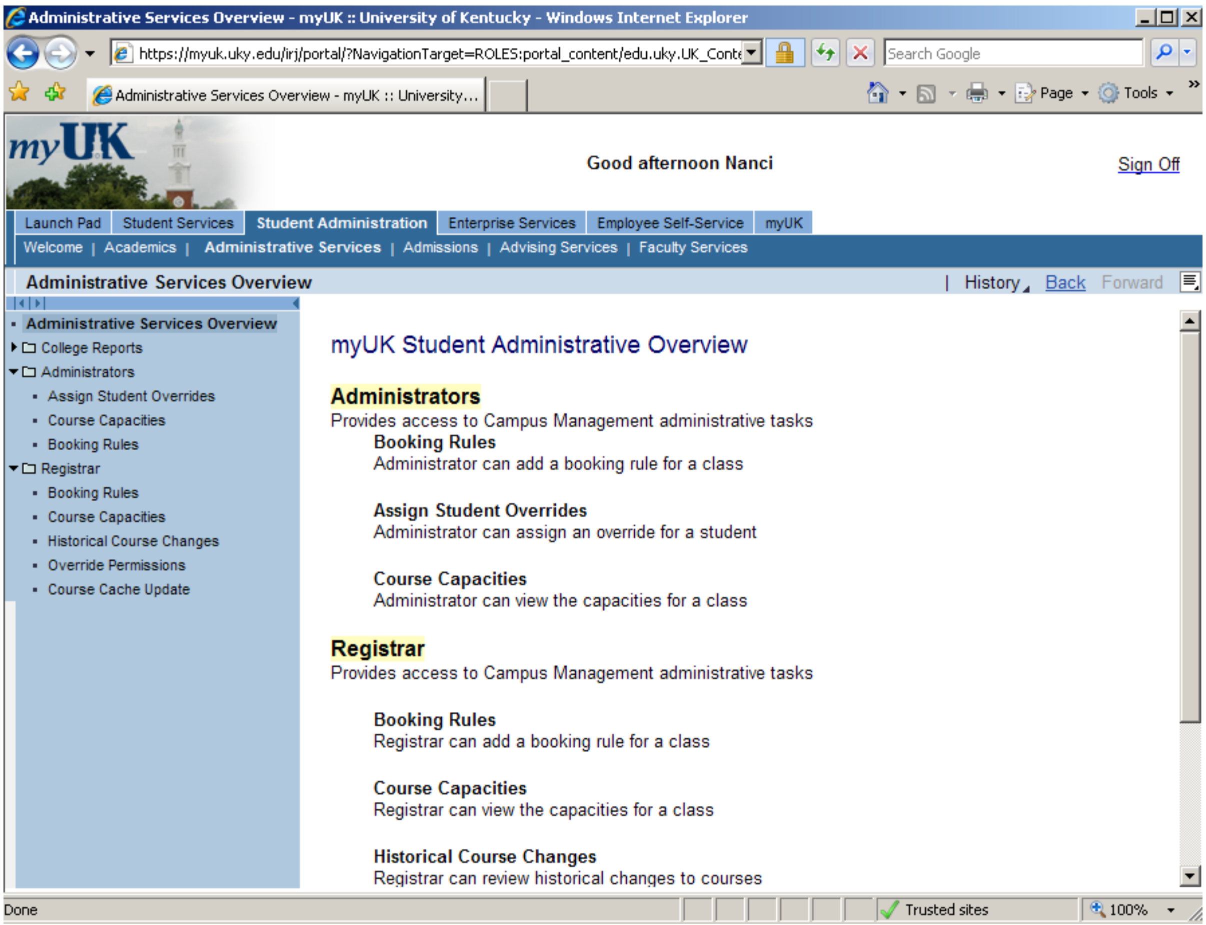
myUK PORTAL

A portal is a web site that serves as a doorway to other sites and functions. The **myUK** portal is the point of entry to IRIS and is located at https://myuk.uky.edu/irj/portal

To access IRIS, each student, staff, and faculty member **must** sign on to **myUK** portal (shown below) with a unique AD (Active Directory) User ID and Password. AD credentials are assigned to admitted students and newly-hired employees and are used for UK Exchange e-mail as well.

To use **myUK**, employees and students must have an Internet connection and a browser (preferably Internet Explorer). There are separate tabs in the portal for Student Services (used by students) and Student Administration (used by staff and faculty). What each user can see and do in the portal is determined by individual responsibilities at the University and the related and assigned role in IRIS security.

The portal makes it easy to sign on and perform tasks via the web. Students can book classes, staff members can access student information, and instructors can submit grades. Not all work related to Campus Management can be done in the portal. For example, while holds may be viewed in the portal, they must be created in the CM module.



CAMPUS MANAGEMENT AND THE SAPGUI

GUI (pronounced GOO-ee) is the acronym for Graphical User Interface, which is software that lets users interact with a computer system by pointing and clicking on icons, buttons, and menus. When you perform a Google web search or edit a document in MS Word, you are using a GUI. The GUI makes it easy to give commands which are then translated into instructions that the SAP program can interpret.

The SAPGUI permits authorized users to work directly in Campus Management. Installed SAP software, an Internet connection, and a browser (preferably Internet Explorer) are requirements for working in the GUI. Users navigate by using the SAP Easy Access Menu and perform tasks with transaction codes.

ROLES AND IRIS ACCESS

Access to IRIS is role-based, i.e., tied to the particular work an employee does at the University. For example, an account clerk's work responsibilities are different from those of a student affairs officer, and for this reason the two employees would be granted different roles for access.

Some employees have "display only" roles in IRIS. They can view information, but not change it. The information that can be viewed is also determined by assigned role. In most cases, IRIS access is not granted until successful completion of training. An exception is made for faculty members who use **myUK** for grading, class rolls, advisor holds, and overrides.

- Everyone who uses IRIS must have an **Active Directory Account** (computing account).
- Each employee must sign the electronic **Statement of Responsibility**. This agreement needs to be completed only once.
- Each employee must have an IRIS training plan established. The plan includes all courses the employee needs to carry out job responsibilities.
- IRIS training includes **overview courses** and **role-based courses**. Trainees must demonstrate competency through assessment at the conclusion of each role-based course.
- Training plans for employees with CM roles are administered by **designated contacts** in the colleges and academic/student support units who work with the CM Team. Plans are not required for faculty members who need only the **myUK** portal access.
- Along with development and delivery of instruction, the IRIS Training Team maintains all training records that form the basis for access to the production system. After training records are updated, security roles are assigned and employees gain access to the production client.
- New hires should direct questions and concerns about access and training to their supervisors.
- Employees who need additional training, due to position change or new responsibilities, should work with their supervisors to get training plan modifications processed.

BASIC CAMPUS MANAGEMENT TERMINOLOGY

The key to student records is the **Student Number**, a unique 8-digit ID number assigned to each student in IRIS. This number is used to find a student's information in IRIS. The social security number, if known, is also maintained, and users can search for a student by SSN.

The **Student File** is a collection of information pertaining to the student's *relationship with UK* (such as holds, recruitment, admissions, registration, and UK degrees awarded) that is organized by tabs.

Student Master Data is the student's *biographic and demographic data*, such as addresses, veteran status, privacy flag, and transcripts and test scores from external organizations.

Academic History is graded course work or credit awarded to a student.

Appraisals are grades.

Booking refers to registration for classes.

Equivalency Determination is the process of determining how a student's transfer work will be equated to UK courses or credit.

External Organizations are high schools, colleges, and other universities attended by students.

Holds, also referred to as Stops, are blocks that prohibit processing of certain activities for a student; for example, a student with an active hold cannot book classes until the hold is resolved and inactivated.

A **Module** is a course.

A **Module Group** is a major or minor, a grouping of courses needed to complete or satisfy requirements for a degree program.

Program of Study is the college and degree.

Qualifications are acquired by students in the course of their studies, such as successful completion of certificate or degree programs. A Qualification may be internal (awarded by the University of Kentucky) or external (earned elsewhere).

PRIVACY FLAG

When users display a student's information in IRIS, they may see a privacy message:

This indicates the student has requested that no directory information be released without the student's written consent, as provided for under the Family Educational Rights and Privacy Act (FERPA). In response to phone or e-mail inquiries, use the general response of "I have no information on this student." When the call or e-mail comes from the student, encourage the student to come in with a photo ID to discuss his or her record and any other matters.

DATES

Dates are extremely important in IRIS. The **Key Date** is the date as of which IRIS displays, processes, or creates student data, i.e., the Key date determines the data you can see for a student. If you use the current date as the Key Date, IRIS will display only current data for the student. If you leave the Key date blank, **all** past and present data is displayed.

Validity Dates are the **From Date** and **To Date** that express whether data is valid or invalid. The **From Date** specifies when the data was created or changed; the **To Date** specifies when the data is invalid. When the **To Date** displays 12/31/9999 (known as the High date), the data is ongoing and valid.

End-users who change student data must remember that the Student Accounting tuition and fee calculation processes are likewise date-driven.

ACADEMIC CALENDAR

The **Academic Calendar** functionality is an important component of the system. The Academic Calendar defines specific dates and periods as time limits. The system uses the Academic Calendar to perform various checks as they relate to start and end dates.

More than one calendar can built in Campus Management. The CM configuration for UK includes a University calendar (undergraduate and graduate) and calendars for the colleges of Medicine, Dentistry, and Law.

Academic years and academic sessions are defined in the Academic Calendar. The defined codes and names for sessions include:

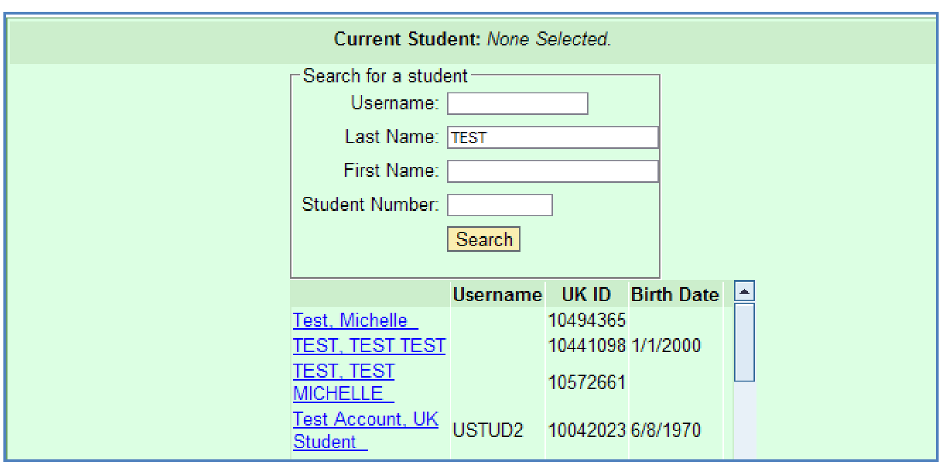
10 – Fall Semester
20 – Winter Intersession
30 – Spring Semester
51 – Summer Session 1
52 – Summer Session 2
99 – Full Year (CEU)

The academic year begins with the fall semester and concludes with the second summer session.

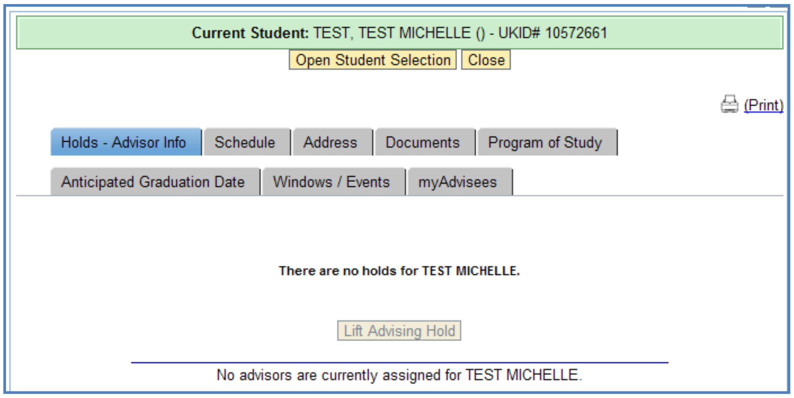
Along with dates that define academic years and sessions, each Academic Calendar includes dates for booking, and dates pertinent to tuition and refund calculation.

STUDENT INFORMATION IN myUK PORTAL

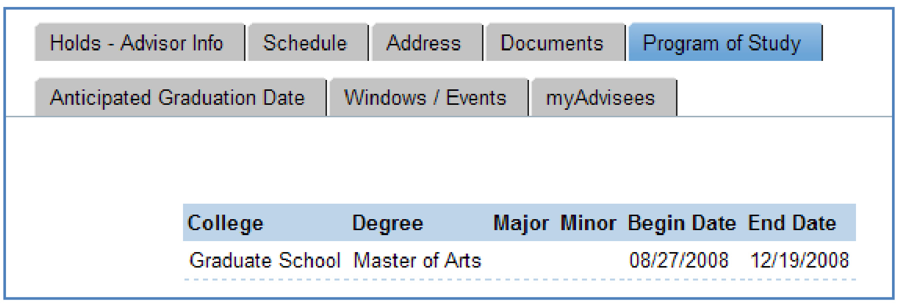
To display a student's data in **myUK**, enter the Student Number or the student's Username (AD User ID), or Last Name and First Name. Then click on the Search button. If there is only one match, that student's data will be displayed. If there are multiple matches, a list will appear. Click on the appropriate entry to display information for that student.



The student's information displays. Data is organized on tabs, and the display opens to the Holds tab. Click on a tab to display the data specified by the tab name.



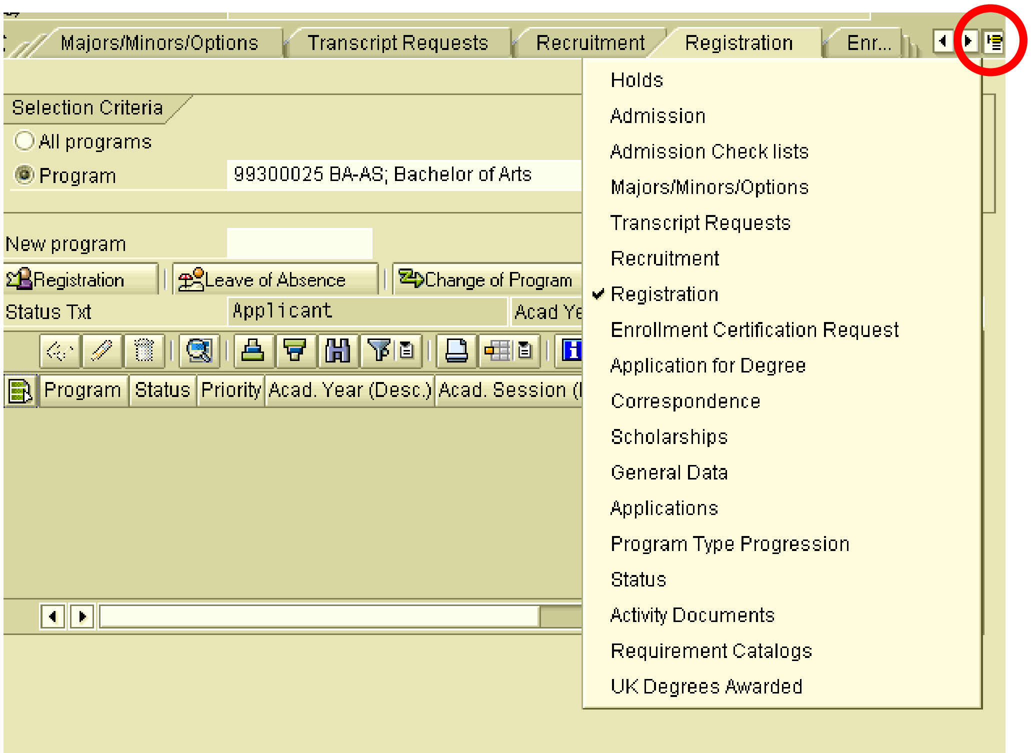
For example, the Program of Study tab is selected in the screen shot below.



More detailed information about the tabs can be found in the *Advising*, *Appraisal*, and *Booking* sections of this online manual.

THE STUDENT FILE IN THE SAPGUI (PIQST00)

If you work with student records in the SAPGUI, you will use transaction code **PIQST00** to display the **Student File**. The Student File contains information regarding a student's relationship with UK. Click on the Tab list icon to view the various tabs available in the Student File. **Note that not all users see all tabs.**



More detailed information about the tabs in the Student File can be found in other sections of this online manual.

Student Search

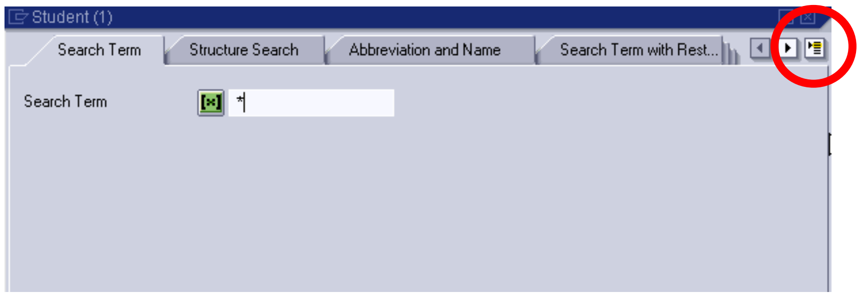
The student number is required for the Student File to display information about a student. If you know the student number, key it in the **Student number** field and press Enter. The student's UK-related information will appear. If you do not know the student number, you can search for it.

To search using the student's name, key the LastName, FirstName directly in the **Student Number** field (example: Smith, John) and press Enter. If there is only one match, the student data will automatically populate. If there are multiple matches, a list will appear. Double-click on the desired choice and the student data will populate.

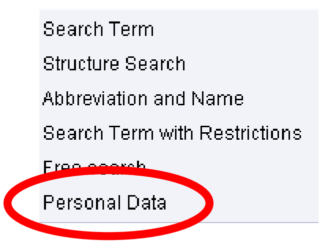
You can also search on partial Last name by using * (an asterisk) as the wildcard character, to substitute for any missing characters. For example, if the student's name is Andersen and you are not sure of the spelling, you could enter Ander* in the Last Name field and press Enter.

To search using other data, click the **Possible Entries** icon to the right of the **Student number** field.

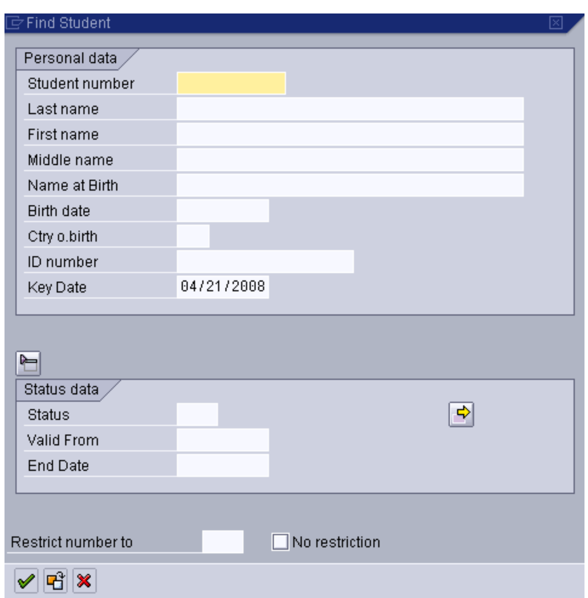
The first time you do this, the Student search box should appear. Click the Tab list icon on the far right to display the list of available tabs.



When the list of tabs appears, click on **Personal Data**. Always use **Personal Data** when searching for a student number in PIQST00.



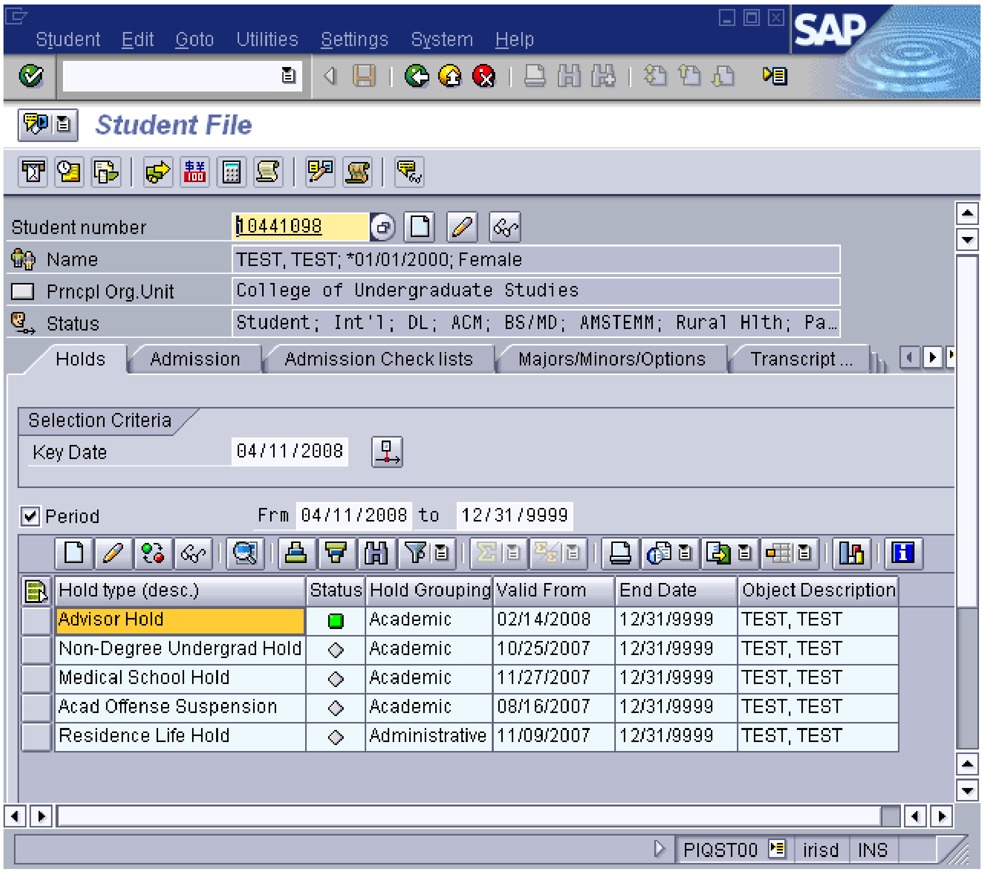
The Find Student box appears, displaying the Personal Data fields.



Enter your search data in the appropriate field(s), and use the wildcard character (*) if needed. Keep in mind the data you enter must match **exactly** what the system contains. If you enter data in every field and make an error in one field, the system will not produce a match, even though the student record does exist. A very effective way to search is to use only the student's SSN; if you have it, simply enter it in the **ID number** field.

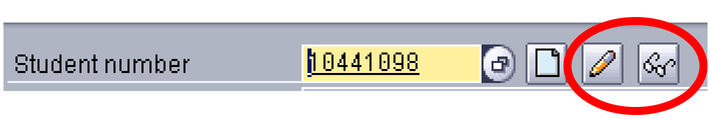
When you have finished entering search terms, click on the icon on the box to perform the search. If there is only one match, the student data will automatically populate. If there are multiple matches, a list will appear. Double-click the desired choice and the student data will populate

Once you have selected the student, the Student File displays that student's information. The tabs you see are determined by your role and access in the system.



Student Master Data

Student Master Data is biographic and demographic information, such as birth date, SSN, addresses, and transcripts and test scores from other institutions. To display Student Master Data, open the Student File with transaction PIQST00 and enter the student number. Then click on the icon to the right of the Student number. The icon is used to edit information (what you can do depends on your role and access in the system).

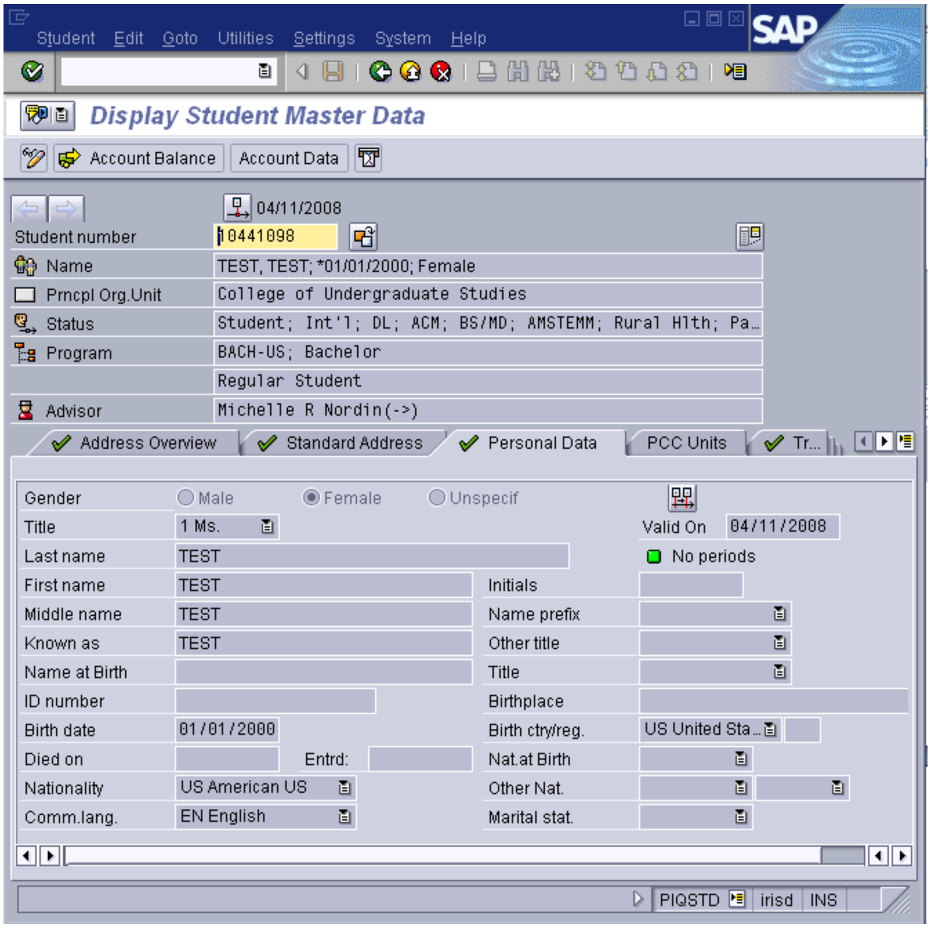


NOTE: Do not click on the **Create** icon.

The Student Master Data screen appears in either Display or Change mode, depending on your selection (Display fields are gray and cannot be modified, and Change fields are white and can be modified.) The

Master Data opens to the **Personal Data** tab, which contains fields for the student's Name, Birth Date, and ID Number (SSN).

The tabs you can see depend on your role and access in the system.



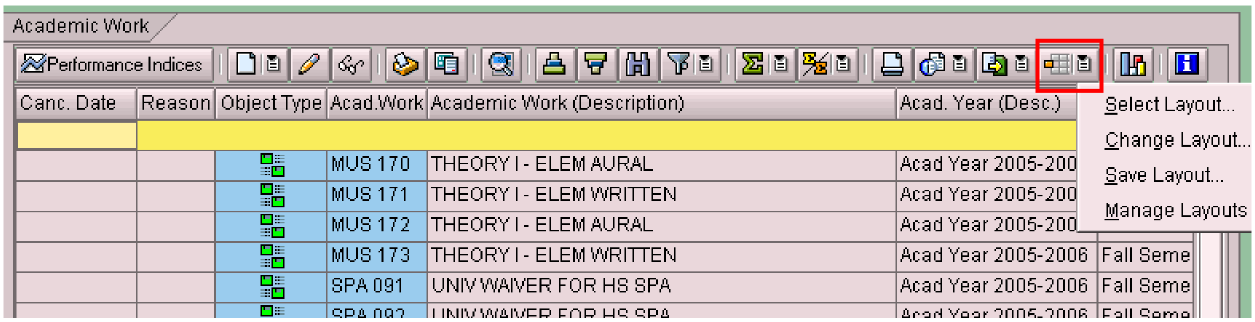
More detailed information about the tabs in Student Master Data can be found in the *Prospective Student Data and Admission*, *External Work and Equivalency Determination*, and *Additional Student Records Information* sections of this online manual.

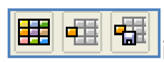
LAYOUTS (ALV GRID)

You can select, change, and save layouts for reports and screens that you view in Campus Management. This feature enables you to customize what you see on the screen and export to Excel. A layout is sometimes referred to as an ALV Grid (ALV is an acronym for *ABAP List Viewer*, and ABAP stands for *Advanced Business Application Programming*).

Layout Settings

To access the layout commands, locate the **Layout Settings**  icon and **click** on the drop-down list to see the Layout Settings menu.



Note: On some screens, three separate Layout  icons appear together on the application toolbar. Click on these icons to **Change Layout, Select Layout**, or **Save Layout**.

Change Layout

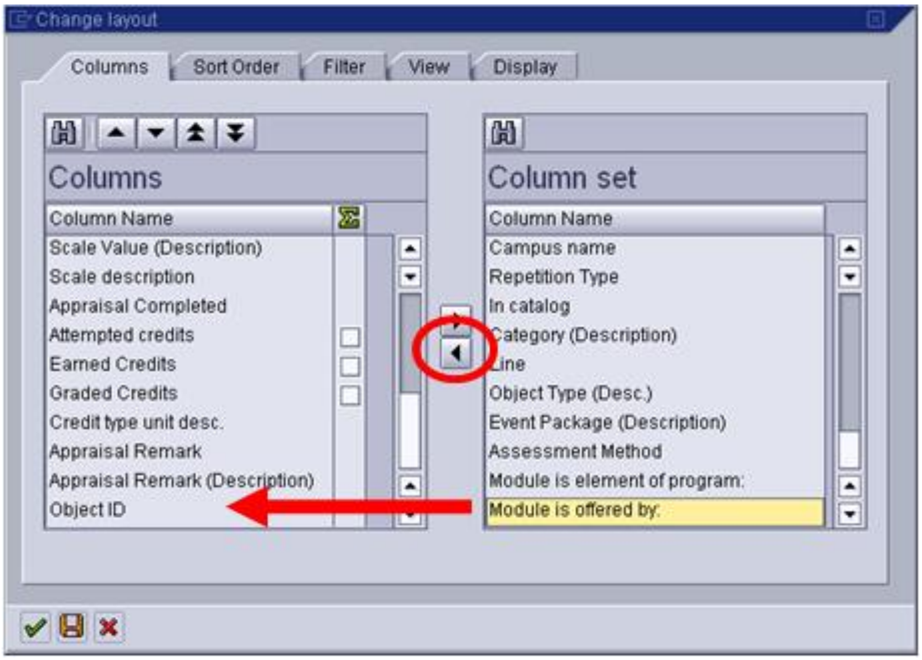
The **Change Layout** option lets you specify the information you want to display. Initially, the default layout displays. When you click on **Change Layout**, the Change Layout box appears, displaying the Columns tab. Other available tabs are Sort Order, Filter, View, and Display.

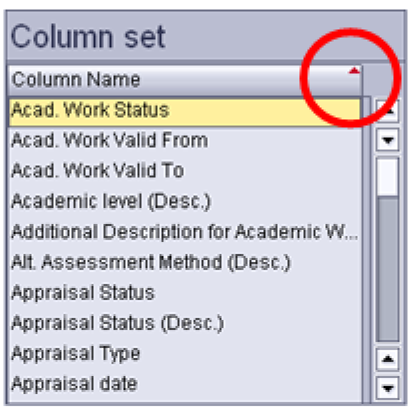
The **Columns** tab contains two panels: The **Columns** panel, which shows the information ***currently displayed*** (and which can be removed) on the screen or report, and the **Column Set** panel, which shows information that is not displayed but can be ***added***. If the lists are long, the panels have scroll bars that let you move up and down the lists. (The lists are different for each screen or report.)

To **ADD** a column to the layout, first click on the desired column name in the **Column Set** panel, and then click on the **Show Selected Fields** icon  to move that item from the right (**Column set** panel) to the left (**Columns** panel).

In the example below, the layout for **Academic Work Overview** is undergoing change. The column name 

has been selected to be moved to the **Columns** panel, resulting in its display on the screen.



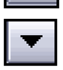


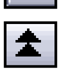
NOTE: To make it easier to find a specific column name, sort the **Column set** list in alphabetical (ascending) order by clicking once on the Column Name header; to sort the list in descending order, click on the Column Name header again. A small red triangle appears in the upper-right corner of the header, indicating that the list is sorted and in what order.

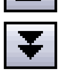
On the **Columns** panel, the column names are listed in the order in which the columns are displayed on the layout. When you add a Column Name from the **Column set** panel, it is moved to the bottom of the **Columns** panel.

To reposition the column name, click on it to select it and then use the arrows at the top of the window to move it up or down the list. First, select the column name you want to reposition, and then click on the appropriate icon:

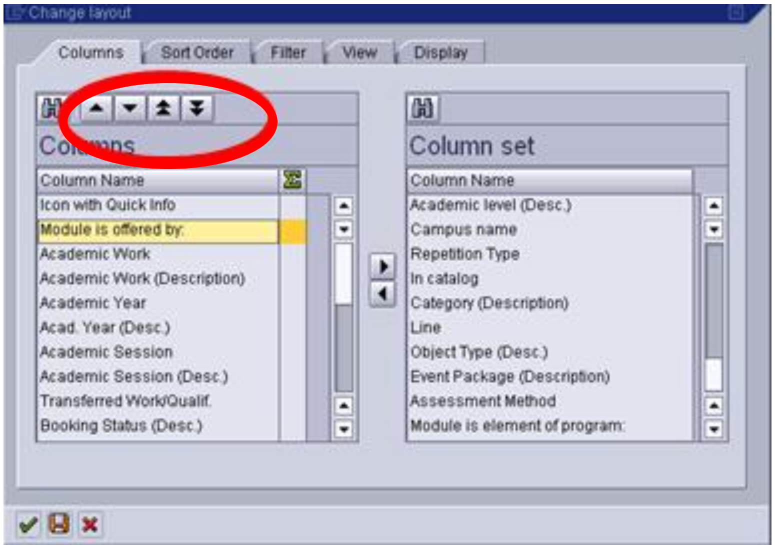
 The **Up One Position** icon moves the item up in the list.

 The **Down One Position** icon moves the item down the list.

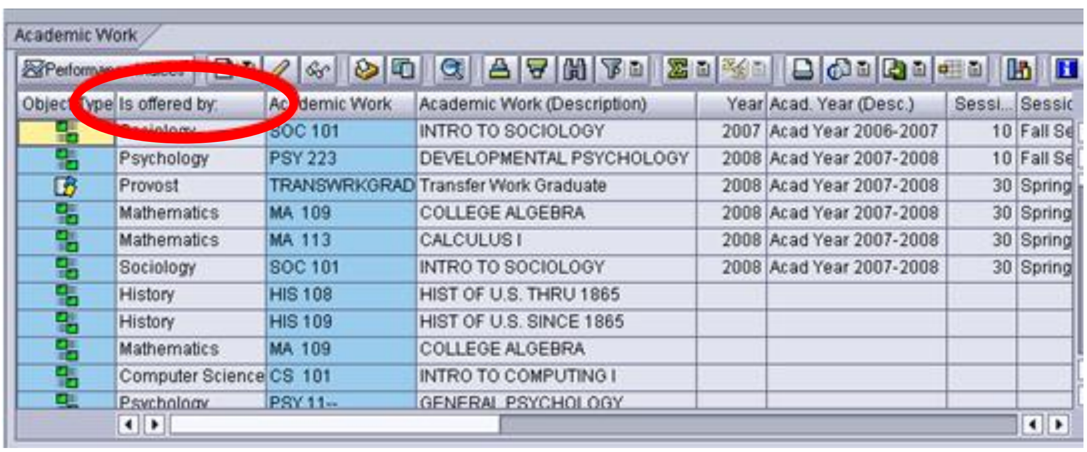
 The **Selected Row to Top** icon moves the item to the top of the list.

 The **Selected Row to Bottom** icon moves the item to the bottom of the list.

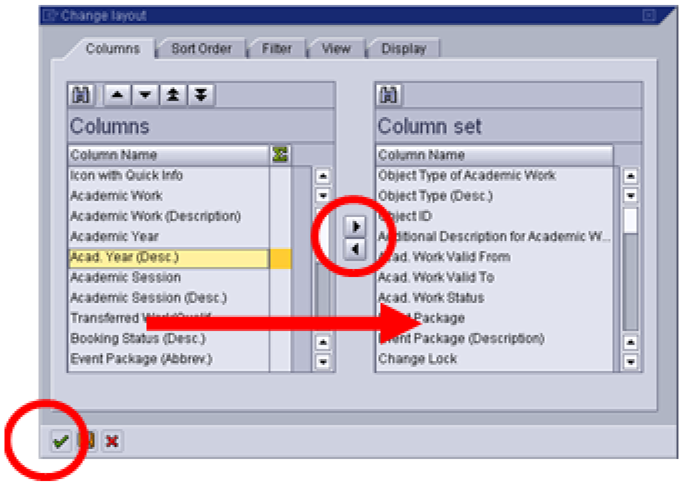
In this example the selected column name "Module is offered by:" has been moved it up to the second column in the layout. To display the new layout, click the icon.



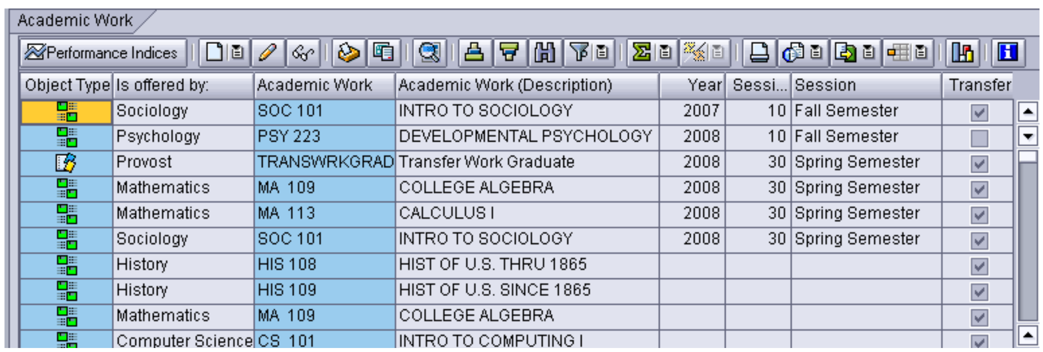
The new layout appears, showing the additional column in its new position.



To **remove** a column, open the Change Layout box and in the **Columns** panel, select the column name. Then click on the **Hide Selected Fields** icon to move that option from the **Columns** panel on the left to the **Column set** panel on the right. After removing the column(s), click on the icon.



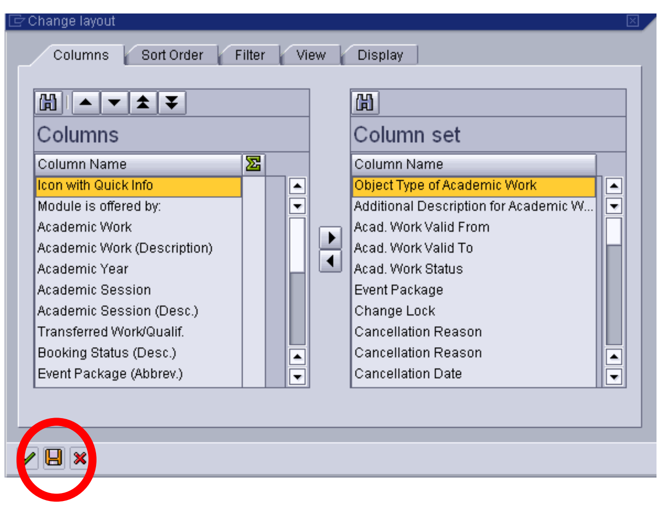
The moved column(s) will not be displayed on the layout.



Object Type	Is offered by:	Academic Work	Academic Work (Description)	Year	Sessi...	Session	Transfer
	Sociology	SOC 101	INTRO TO SOCIOLOGY	2007	10	Fall Semester	
	Psychology	PSY 223	DEVELOPMENTAL PSYCHOLOGY	2008	10	Fall Semester	
	Provost	TRANSWRKGRAD	Transfer Work Graduate	2008	30	Spring Semester	
	Mathematics	MA 109	COLLEGE ALGEBRA	2008	30	Spring Semester	
	Mathematics	MA 113	CALCULUS I	2008	30	Spring Semester	
	Sociology	SOC 101	INTRO TO SOCIOLOGY	2008	30	Spring Semester	
	History	HIS 108	HIST OF U.S. THRU 1865				
	History	HIS 109	HIST OF U.S. SINCE 1865				
	Mathematics	MA 109	COLLEGE ALGEBRA				
	Computer Science	CS 101	INTRO TO COMPUTING I				

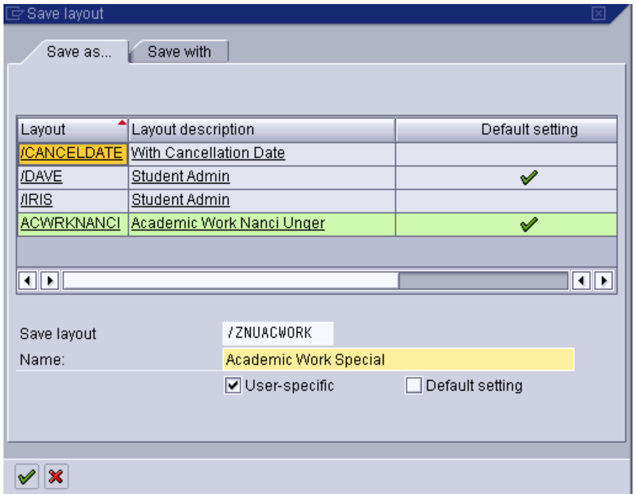
Save layout

To **Save** the layout you just created, reopen the Change layout box and click the icon.



The Save layout window appears. In the **Save layout** field, enter a name for the layout. **If this is a layout you have created, make sure the first character in the name is a Z; this indicates it is a user-defined layout.**   Next, key a brief description of the layout in the **Name** field.

Select the checkbox next to **User-specific** to indicate that only you can make changes to the layout. If you want this layout to automatically appear when you open the report or transaction, select the checkbox next to **Default setting** as well.

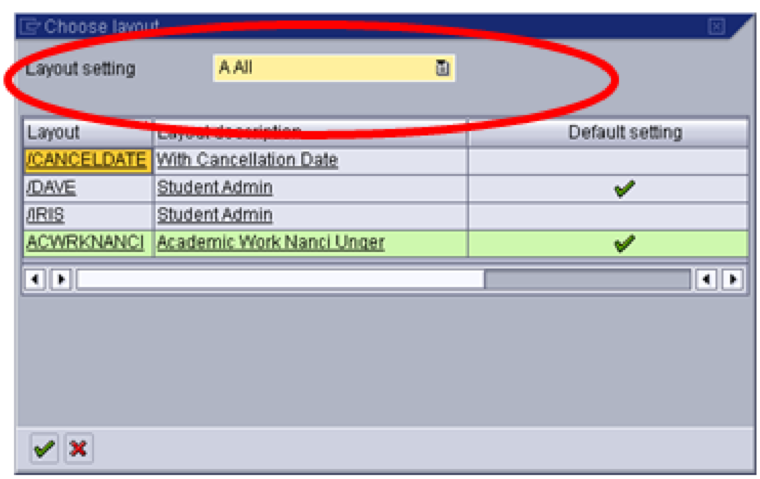


Select layout

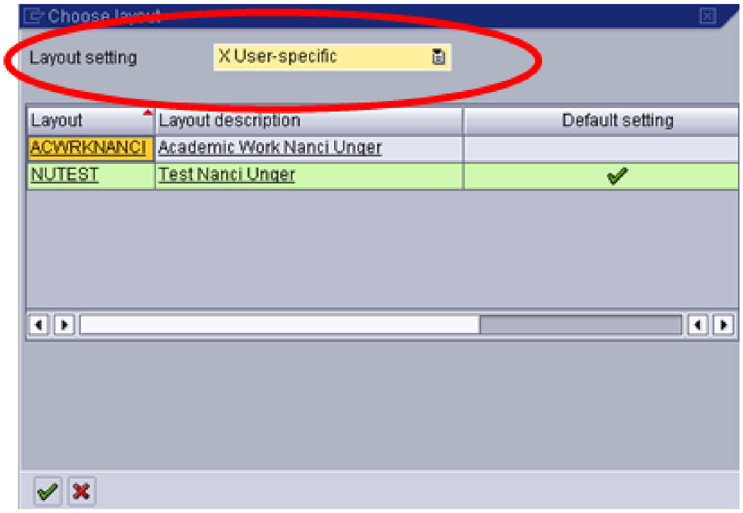
To choose the layout you want to use, click on the **Layout Settings**  drop-down list and choose **Select Layout**.

The Choose layout box appears. In the Layout setting drop-down menu, you can select **A All** to show all available layouts or **X User specific** to display only the layouts you have created and marked as user-specific.   A list with a green checkmark is a default. When the list appears, click on the layout you wish to display.

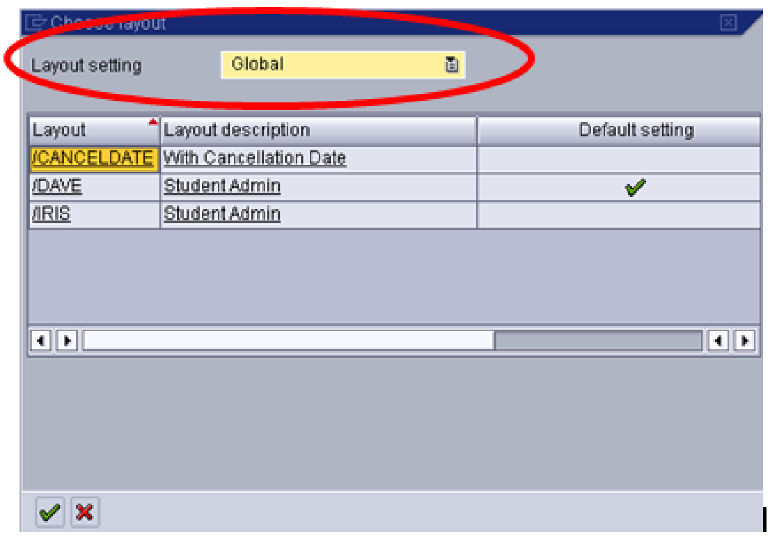
The Layout setting **A All** displays all layouts available to you:



The Layout setting **X User-specific** displays layouts you have created:



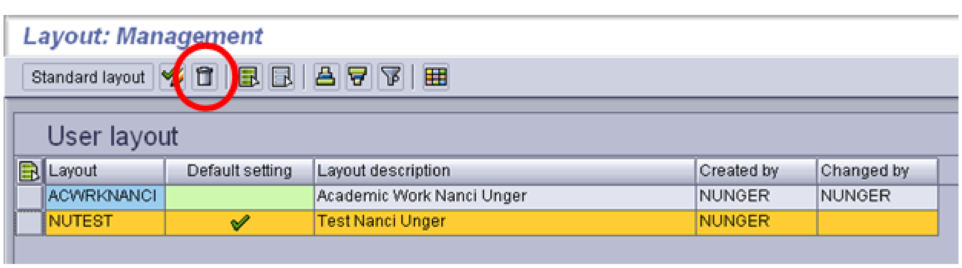
The Layout setting **Global** displays available layouts you have not created:



Delete layout

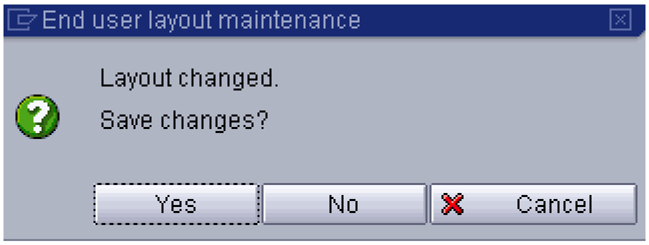
To delete a layout on your user-specific list, click on the **Layout Settings**  drop-down menu and choose **Manage Layout**. The list of your user-specific layouts will display.

Find the layout you want to delete, and select that record. Then click on the **Delete Layout**  icon on the application toolbar.



The layout will disappear from the list displayed. It will not be deleted, however, until you click  on the standard toolbar.

To keep the layout, do not save; instead, click the **Back** icon  on the standard toolbar. The End User Layout Maintenance box will appear:



Click **No** if you do not want to save your changes (i.e., you do not want to delete the layout). To delete the layout, click **Yes**.

E-MAIL COMMUNICATION

The University of Kentucky e-mail address is the official means of communication with students. Along with electronic billing notices, students receive e-mail communication from professors, advisors, and various student organizations, as well as important broadcast messages from the University Registrar.

Each student must activate the assigned computing account (Active Directory Account) through the web-based UK Accounts Manager. Once activated, the AD User ID and password can be used as the **link blue** User ID and password. With single sign-on, students can access multiple services within **link blue,** including Exchange e-mail.

Students with questions regarding e-mail activation should contact the IT Customer Service Center at 257-1300.