

# IRIS INSIGHT

IRIS - Providing Insight to Alaskans

August 2015

## Tips for Contacting the IRIS Help Desk

The IRIS Help Desk is available to assist you Monday-Friday 8:00am to 4:30pm.

If we are busy assisting another user, you may leave a voice message or email the Help Desk.

All calls, voicemails and emails are logged and distributed to the appropriate IRIS SME for resolution.

When emailing the IRIS Help Desk, please include the following information, if applicable, to expedite response time:

- Reference the Document Code and Document ID
- Include your login ID number
- Include screen shots of error messages
- Include any steps you have already tried to resolve the issue

Please be aware some questions are more complex, requiring additional time to respond. Our goal is to provide you with an update within 4 hours of your initial request.

Your patience is greatly appreciated.

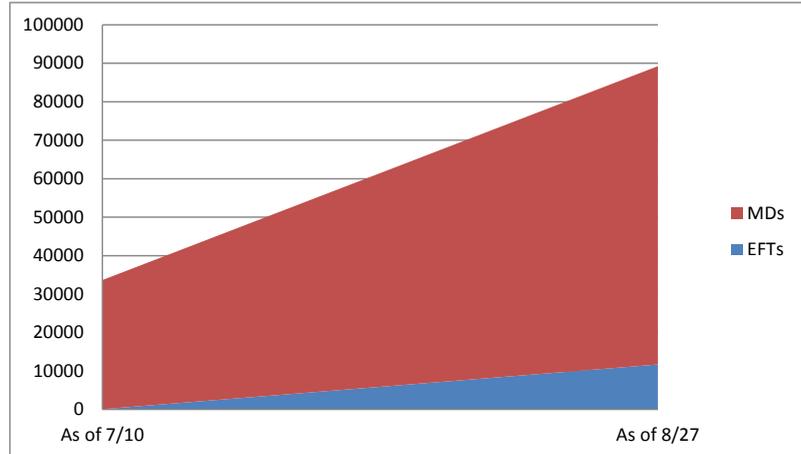
**IRIS Help Desk**  
**Phone: 907.465.5555**  
**Email: IRIS.Project@alaska.gov**

[IRIS.Project@alaska.gov](mailto:IRIS.Project@alaska.gov)

## IRIS - 8 Weeks In & Going Strong

It is hard to believe we've been working in IRIS for 8 weeks! And as of today, all conversions are complete!!!

We acknowledge the learning curve employees are working through with IRIS and remind everyone to celebrate the small successes as we acclimate to doing business in our new financial and procurement system.



As of July 10th, **89** EFTs totaling \$26,347,447.24 and **33,558** MDs for \$64,965,287.11. As of August 27th, there were 11,711 EFTs and **77,522** MDs.

The graph above illustrates the progress we've made in processing EFTs and MDs. To date, 11,711 Electronic Fund Transfers (EFT) totaling \$898,998,923.02 and 77,522 Manual Disbursements (internal and external system warrants) totaling \$322,433,067.80 have processed!

*Personally, I am really enjoying the system. Of course there is a lot to learn, but at the same time, I am really enjoying the challenge. Making payments and certifying documents in IRIS, I find are much easier than AKSAS... I feel the State of Alaska is off to a great start!*

- Wendy Vuille, Admin Officer II (DOA)

Do you have a comment, story, or anecdote about working in IRIS that you would like to share? Please email [IRIS.Project@alaska.gov](mailto:IRIS.Project@alaska.gov).

<http://doa.alaska.gov/dof/iris>

## Recap of Important Updates

The following is a summary of adjustments, additions, and recommendations that have been distributed through IRIS Project communications and Quick Reference Guides:

### PCard

- On PRC, TAPRC and PRCUR documents, the following information should be entered in the Commodity section of the document to better assist the vendor in identifying the transaction: Vendor Invoice, Invoice Line, Invoice Date, Check Description.
- In the Check Description field, it is recommended that you include the following information - contact name and number, customer or account number, and any other details that may help the vendor identify the transaction.

### TAPO & PO3 Documents

- All pass through grants and travel authorizations will not be assigned to the departmental workload.

### Copy Forward to Confidential Payments

- Functionality to **Copy Forward** from a GAE to CGAX, CT to CPRC, and TAPRC to MDFW is now available.

### Populating the Vendor Invoice Number & Check Description Fields

- In order for the invoice number to appear on the warrant stub as well as on the EFT addenda for all EFT formats, the invoice number must be entered in the Vendor Invoice field on IRIS payment documents.
- If you do not have an invoice number, please populate the field with information that will assist the vendor in identifying the payment.
- Information entered in the Check Description field displays in VSS for the vendor to view. (Please populate the Check Description field located in the Commodity section.

### Populating the Check/ EFT Issue Date

- When processing MDFW/ MDHW documents it is imperative that the Check/ EFT Issue Date field in the IRIS document match the Date of Issue on the physical warrant. This information must be manually entered, otherwise there will be major issues with reconciliation and a significant effort on the part of departments will be required to correct the issue.

### Locating a Vendor's Alias/DBA in IRIS

- To locate a vendor, use the VCUST table rather than search functionality within a specific document since the table will ALWAYS provide an Alias/DBA if one exists.
- Utilize the wildcard (\*) feature to increase your chances for a successful search return.

For additional information regarding these updates, please refer to the Quick Reference Guides located under the References & Resources section of the IRIS website and the Communications folder on the IRIS SharePoint site.

## Video Tutorials & Training Manuals Update

Ten more video tutorials have been added to the References and Resources section of the IRIS home page! Topics include processes related to Accounts Payable, RSAs, Clearing Cash Receipts, and Billed Receivables. Have a topic idea for a tutorial? Email [IRIS.Project@alaska.gov](mailto:IRIS.Project@alaska.gov).

The IRIS team is in the process of updating the IRIS training manuals as changes to how we work in IRIS are determined. We anticipate releasing finalized versions of all the manuals in early October, once we pass through this initial stabilization period. In the interim, please be sure to check: broadcast messages when logging into IRIS, updates posted to the IRIS homepage, and communications distributed from the IRIS team.

[IRIS.Project@alaska.gov](mailto:IRIS.Project@alaska.gov)

## Workflow, Worklists & Workload

In IRIS, we use the terms workflow, worklist, and workload. While these terms may sound similar they each have very distinct meanings.

**Workflow** refers to the document approval path. Workflow, established by each department for each document type, automatically routes documents through a pre-defined set of approvers.

**Worklists** may be thought of as electronic in-baskets where documents requiring approval are placed. All users have a personal worklist and depending upon their duties and how their department's workflow is set up they may belong to one or more approval group worklists.

**Workload** is a term used widely in procurement and refers to the amount of work to be done by an employee. In IRIS, there are Procurement Workload Managers, who monitor and assign procurements to the buyers they supervise. Workload can be allocated in terms of dollar value, complexity, commodity, procurement type, and number of procurements in process.

### Are you on our mailing list?

If you would like to be added to our monthly newsletter distribution list please email:  
[IRIS.Project@alaska.gov](mailto:IRIS.Project@alaska.gov)

<http://doa.alaska.gov/dof/iris>