ALDER reports for IRIS FIN - Security and Workflow

IRIS

Integrated Resource Information System

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Contents

Introduction

There are a number of ALDER reports that can be used when reviewing current security assigments to employees. These reports currently are only for IRIS – FIN. We do not have similar ALDER report for IRIS – HRM.

This job aid explains each report available. All reports are located in ALDER in the Enterprise Folder: Public Folders >> Enterprise >> Financial (IRIS) >> Security and Workflow (SW)

IRIS SW Approval Roles for Documents

This report shows which documents an Approval Role is linked to as well as which documents an user can approve base on the approval role they are assigned. The report can be run by selecting Document Codes, Approval Role Department, Approval Role or by User.

There are four separate tabs/reports:

By User by Department
Based on criteria, shows which documents an employee can approved and is sorted by Employee ID.

By Role by Document
Based on criteria, shows which documents an approval role is associated with.

By User by Role by Doc by Wrk Flow Rule
Based on criteria, shows which document workflow rule and approval level an employee can approve within each approval role they are assigned.

By Role by WF Rule Detail
Based on criteria, shows which workflow rule and detail that each approval role is related to.

IRIS SW Approval Roles for Users

This report shows a list of all Approval Roles and shows which approval roles a user is assigned. This report does not show documents nor workflow rules.

There are three separate tabs/reports:

List of Approval Roles
Based on criteria, shows a list of Approval roles by Department. It also shows how many users are assigned to each role (# Users Assigned). This report is often used to communicate to agencies when they should add more people to approval roles. It is DOF's recommendation that each approval role have at least 2 users assigned.

Approval Role by User

Based on criteria, shows which employees are assigned each Approval Role. It is sorted by Approval Role ID.

User by Approval Role

Based on criteria, shows which approval roles are assigned to each user. It is sorted by Employee ID.

IRIS SW Document Counts by Department

This report shows a list of all documents that are in draft phase or pending approval.

There are three separate tabs/reports (To be added to later):

Total by Dept

By Dept by Doc Code

By Doc Code

Excel

IRIS SW Security Roles and Resources (SCRACS Records)

This report shows a list of resources (documents, pages, tables, etc) from IRIS and which security roles they are assigned. It can be ran by selected either the resource: i.e GAX, PRCUA, etc. and/or by Security Role(s): ie. DEPT_PCARD, PROC_OFF.

There are two separate tabs/reports:

Role by Resources

Based on critera, shows each resource assigned to Security Role and is sorted by Security role, then by resource.

Resource by Role

Based on critera, shows each role is assigned to each resource and is sorted by resource, then by security role.

IRIS SW Security Roles for Users

This report shows a list of users and which Security Roles a user has been assigned. It can be ran by Department, Resource (document, page, table); Security Role or User.

List of Users
Based on criteria, shows a list of Users and is sorted by User ID.

By Dept by Role by User
Based on criteria, shows each Security role and all users assigned to the role. It is sorted by role then by user.

By User by Role
Based on criteria, shows each employee and all security roles assigned to the employee. It is sorted by employee, then by role ID.

Excel
Based on criteria, shows a list of employees (with PCN) and every security role they are assigned to. It can be easilty exported into Excel.

IRIS SW Workflow Rules

This report shows a list of workflow rules for a department.

It has four separate reports/tabs.

Doc by Rule Excel
Based on criteria, shows a list of workflow rules by document. It is sorted by document, then by Rule ID. It shows the approvers role IDs for each approval level and condition.

List with Conditions
Based on criteria, shows a list of workflow rules with roll up elements, approval role ID and conditions. It can be easily exported into excel.

List without Conditions
Based on criteria, shows a list of workflow rules without conditions. It can be easilty exported into excel.

List of Rule IDs
Based on criteria, shows a rule IDs with roll up elements. It can be easilty exported into Excel.