ELR Approvals via IRIS Mobile

Please refer to the document Installing Fiori for IRIS Mobile for instructions on how to download and install the SAP Fiori Client application on to your smartphone or tablet.

IRIS Mobile will enable users to approve work items from their mobile devices. Initially, however, they will just be able to approve Ledger Reconciliations.

**Home Screen**

Once you log into IRIS Mobile via the SAP Fiori Client application, you should be taken to your Home screen that will look something like the image below. The Home screen contains different catalogs like Employee Self-Service and My Approvals. Depending on your authorizations, you may or may not see the same exact catalogs on your own device. Each catalog contains one or more tiles; these tiles are used to access functions that have historically been done via the IRIS Gui or the Portal.

At the top of the Home screen, you will see an icon of a person. If you click on that, you will be shown a list of options, including Log Off. You can either log off via this button, or you can simply close out the app.
**My Work Items List**

To access your ELR Approval work items, tap on the My Inbox tile located on your Home screen. You will be taken to a list of your work items. Currently, there are a limited number of types of work items in the IRIS Mobile Inbox. However, we are hoping to continue to add various work items over time.

**Work Item Functionality**

From here, you can select the work item that you want to open by tapping on the work item. Once you tap the work item, it will take you to another screen that gives you more information about the work item as well as a way to open the work item:
At the bottom of the screen, there is a set of buttons: Claim, Forward, Suspend, and Open Task. If you are an IRIS user, you are probably familiar with the Forward button. However, the Claim, Suspend, and Open Task may be new to you. Claim is the same as Reserve in the IRIS Gui. It is a way to Claim the item so that it is only in your inbox, if the work item went to multiple users. Forward allows any IRIS user to forward a work item. However, PIs cannot forward work items, which is the same functionality they currently experience in the Portal. The Suspend button is currently disabled. Open Task is the button you tap to open the Work Item, so that you can Approve, Reject, or Acknowledge the ELR Work Item. These buttons are the same regardless of whether it is an Activity or No Activity Work Item. We do not recommend using the Claim button. You can Claim a Work Item simply by tapping the Open Task button.

Depending on the size of your phone, all of these buttons may not be visible at the bottom of the screen. If you see some of the buttons at the bottom of the screen followed by an ellipses, tap on the ellipses to open up a menu with the remaining buttons to select from.
Reviewing the Ledger Report

We will look at both an ELR No Activity and ELR Activity Work Item. We will look at a No Activity Work Item, first. To open the No Activity work item, click on the Open Task button. From there you will be taken to your No Activity Funds. Below is an image of what the No Activity Acknowledgement screen will look like along with a description of the different aspects of the screen:

1. When you first open the work item, you should see a message that states, “Work item successfully claimed.” This message will disappear a few seconds after you open the work item.
2. This is where you can see the No Activity Fund information, which includes the Funds Center, the Agent ID(s) (who all this work item was sent to), Valid From and Until Dates, and any comments made by the user that submitted these work items for Acknowledgement.
3. This is where you can see the work item number and ID
4. After you have reviewed the information, please tap the Acknowledge button. This acknowledges the work item and completes the workflow. Once you have tapped the Acknowledge button, you should be taken automatically back to your Inbox, and the work item should no longer be listed in your Inbox.

Like No Activity work items, you open an Activity work item by tapping the Open Task button. From there, you are taken to a mobile view of the Ledger.

1. When you first open the work item, you should see a message that states, “Work item successfully claimed.” This message will disappear a few seconds after you open the work item.
2. At the top of the screen, you should see the fund, fund name and the reconciliation period that you are viewing.
3. Each section of the UT Ledger is visible from IRIS Mobile. However, we have collapsed all panels, except for the Overview and the Warnings. The Overview lists the funds center, fund, reporting period, and reporting status.
4. If you wish to view the traditional version of the UT Ledger, you can tap the PDF button, and the traditional PDF will be displayed
5. You can either expand each panel of the UT Ledger one at a time by clicking on the arrow beside each panel, or you can press the button at the top of the screen that says “Expand,” and it will expand all panels simultaneously.

6. Once you have reviewed the UT Ledger, tap the Reconcile button, and you will be taken to the ELR view of the UT Ledger where you will be able to either Approve or Reject the ledger reconciliation.

**Reviewing the Electronic Ledger Reconciliation and Approving or Rejecting**

The ELR view gives you the ability to review the line items, which is how you can view the ELR from the Gui and the Portal.
1. The ELR view is sorted by Commitment Item
2. The amount is sub-totaled on the Commitment Item level with the associated line items below the sub-total
3. Comments and attachments are viewable at the line item level. If there is a comment or an attachment the icon will be blue, instead of grey.
   a. If you wish to add a comment, tap on the comment button, type your comments in the box, and tap the Add button.
   b. If you wish to add an attachment, tap on the attachment button, tap the plus sign at the top of the window, select your attachment, and then tap the Upload button. Please note that you can only upload PDFs and Microsoft Word and Excel documents. Other document types are not supported by this functionality.
4. You are able to drilldown on the line items to see additional information. Additionally, if you see a line item that is highlighted in light green, it is in status Under Review.

5. Because a phone has limited screen real estate, not all of the header features can be displayed at the top of the ELR screen. You will notice ellipses located to the right of the Fund at the top of the screen, if you click on the ellipses, you will be taken to a drop down menu that includes additional functionality for the ELR.

6. The drop down menu includes expand and collapse buttons that allow you to quickly and easily expand or collapse all of the commitment item panels, so that you only see the Commitment Item subtotals and the total for the month. It also includes the Header Level Attachment and Comment buttons. These function the same way the line item Attachment and Comment buttons do. Additionally, it includes the Payroll Details button, which allows the user to view payroll information by person.
7. Once you have reviewed the ELR, tap either the Approve or the Reject button.

If you choose to reject the ledger, you will be required to type in a comment, and then you can tap the Confirm button.

You will be taken back automatically to your Inbox, and you should see a message saying “Ledger Rejected.”
If you choose to approve the ledger, you will receive a pop-up message asking if you are sure you want to approve the ledger. Tap the Yes button, and you will be taken automatically back to your Inbox, and you should see a message saying "Ledger Approved."

Returning to Home Screen

When you are ready to return to the Home screen for IRIS Mobile, simply tap the Home button at the top of the screen, or double-tap on the screen and you will receive a toolbar that displays the Home button,
as well. If the toolbar at the top of your screen disappears and you can no longer see the Home button, gently drag down with your finger, and it will reappear.

Please note: If you click on the drop-down menu in the top right-hand corner of the screen from within the My Inbox tile, it looks as if you can add/manage substitutes. However, we have not configured this functionality, so it isn't currently working. If you wish to manage your substitutes, you will still need to do so via the desktop GUI.