

My IRIS Web Portal Inbox

Electronic Certification of a Travel Expense Report

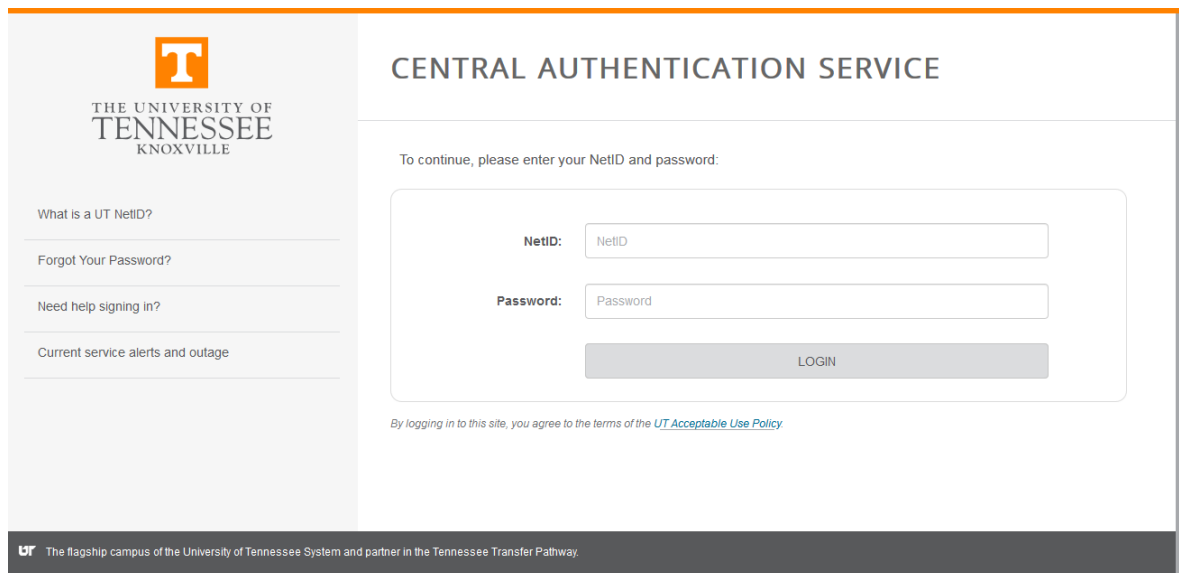
Steps to certify or reject your own Travel Expense Report in the My IRIS Web Portal:

Note 1: If you enter and submit your own travel expenses through IRIS, the Travel Expense Report will not be sent to you to certify. Entering your own travel expenses and submitting them for approval is implicit certification on your behalf.


Note 2: When someone else enters your travel expenses and has submitted them for approval in IRIS workflow, you will receive an email from the workflow system indicating that you have travel expenses that need to be certified.

Note 3: You cannot forward the work item in your inbox to someone else. You must either certify or reject the travel expenses yourself. It is the traveler's own certification that is needed.

1. To certify your travel expenses in the My IRIS Web Portal, access the My IRIS Web Portal at: <https://irisweb.tennessee.edu>

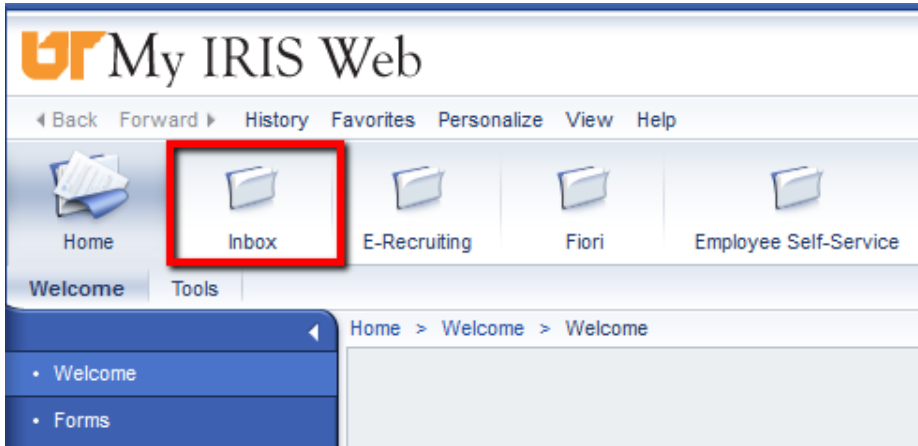


The screenshot shows the Central Authentication Service (CAS) login page for the University of Tennessee. On the left, there is a navigation menu with the university logo and links for 'What is a UT NetID?', 'Forgot Your Password?', 'Need help signing in?', and 'Current service alerts and outage'. The main content area is titled 'CENTRAL AUTHENTICATION SERVICE' and contains a login form. The form prompts the user to enter their NetID and password, with a 'LOGIN' button below. A disclaimer at the bottom of the form states: 'By logging in to this site, you agree to the terms of the [UT Acceptable Use Policy](#)'. The footer of the page includes the University of Tennessee logo and the text: 'The flagship campus of the University of Tennessee System and partner in the Tennessee Transfer Pathway.'

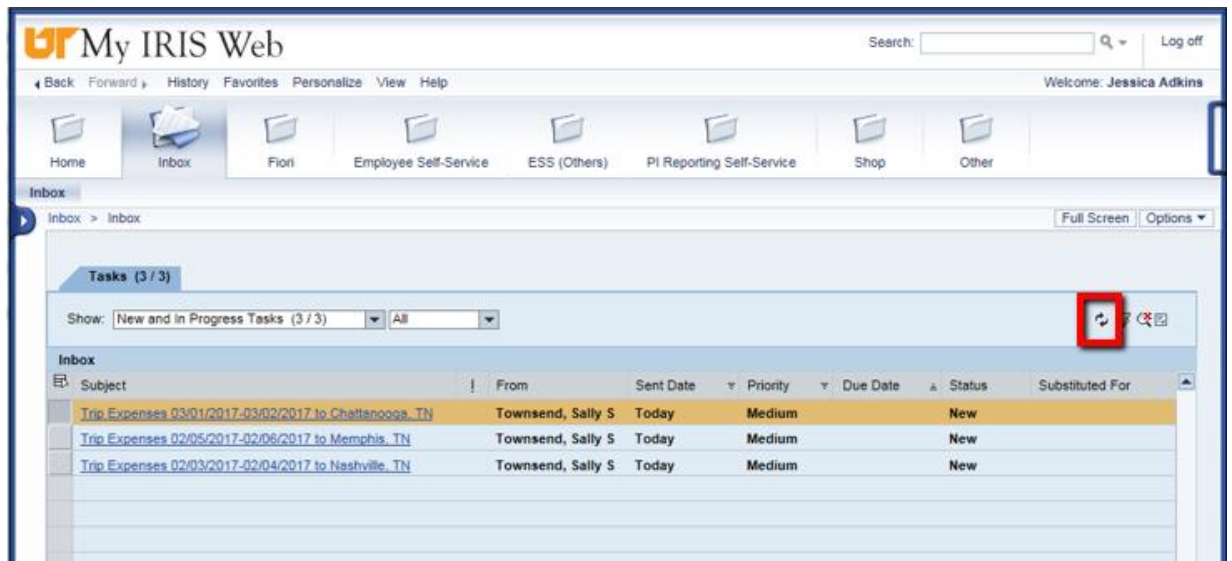
2. Log in with your NetID and password. If you need assistance with your NetID or password, click on the  button or contact the OIT Helpdesk at (865) 974-9900.

- **NOTE:** Make sure your Internet browser settings are set to allow pop-ups from the web address.

3. After logging in to the My IRIS Web Portal, click on the **Inbox** tab to access your inbox:



- If there is a Travel Expense Report to be certified, it will appear in the inbox. It is possible for other types of work items to be in the inbox as well. If you are an IRIS reviewer or approver, all other work items will also show in this inbox. In the example below, there are three Travel Expense Reports in the inbox.
- Sometimes, it takes a few seconds for the inbox display to refresh and show all work items for certification or review/approval. If you do not see a work item appear immediately, click on the **Refresh** icon in the upper right corner of the inbox to refresh the list, as shown in the screen shot below.



4. To launch the work item for certification, single-click on the underlined portion of the line; in this example - [Trip Expenses 03/03/2017-03/04/2017 to Chattanooga, TN](#) - or double-click on the line with the work item.

- A PDF of the most recent Travel Expense Report will then be displayed in a new Internet browser window, as shown below.



Travel Expense Report



00138983170000252

Date: May 2, 2017
Page: 1 / 2
Contact: Hinkle, Kathy
(865) 974-0367
khinkle5@tennessee.edu

Duck, Daffy

Personnel No.: 138983
Home Address: 400 Main St

Knoxville TN 37111

Resp. Cost Center: E170131 IRIS Admin Support
Trip No.: 170000252 March 3, 2017 to March 4, 2017
First Destination: Chattanooga, TN; United States
Region: TN/CH Chattanooga, TN; US
Reason: Attend SACUBO conference
Stat. Trip Type: University Rates

Itinerary						
Date	Time	Event	Country	Location	Region	Reason
03/03/2017	08:00	Trip Destination	US	Chattanooga, TN	TN/CH	Attend SACUBO conference
03/04/2017	17:00	End of Trip	US			

- In addition, a list of attachments for the Travel Expense Report will be displayed. This list will include the Travel Expense Report PDFs that are automatically attached by the system when a Travel Expense Report is submitted to IRIS workflow and travel receipts attached by the originator in IRIS, if any.

Attachment list

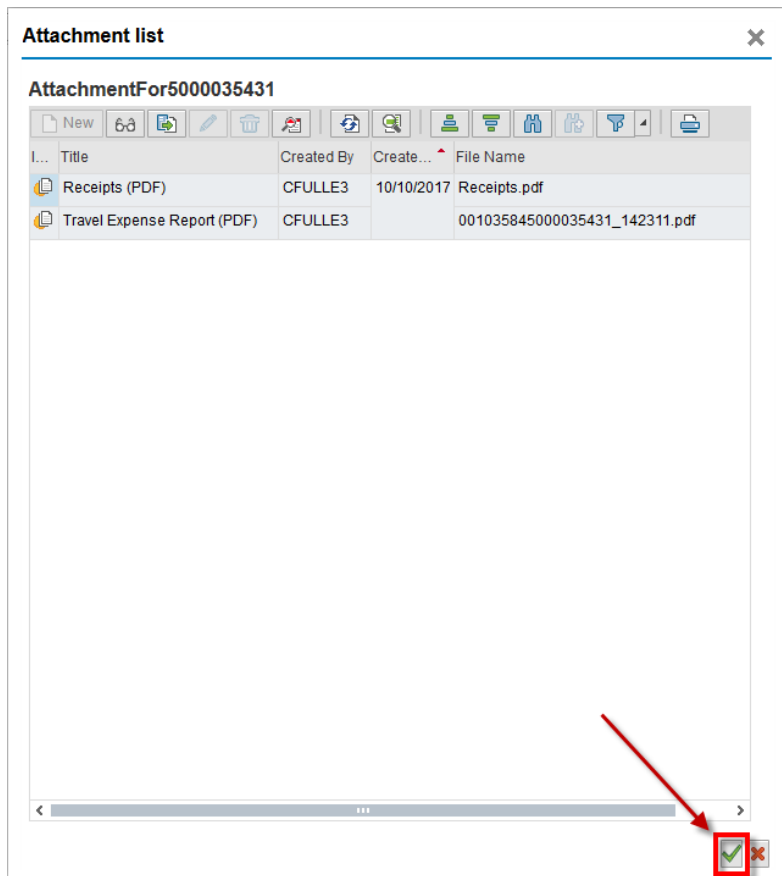
✕

AttachmentFor5000035431

New 68 📄 ✎ 🗑 🔍 🔄 🔍 📁 📄 🏠 👤 🔍 🖨

I...	Title	Created By	Create...	File Name
📄	Receipts (PDF)	CFULLE3	10/10/2017	Receipts.pdf
📄	Travel Expense Report (PDF)	CFULLE3		001035845000035431_142311.pdf

- Double-click on the **Receipts (PDF)** line to see the travel receipts that support the travel expenses included on that Travel Expense Report. When finished viewing this information, click on the green check mark at the bottom of the **Attachment list** pop-up window to close that pop-up window and continue.



5. Next, you will be presented with a list of three actions that can be performed for this Travel Expense Report: **'Certify'**, **'Reject'**, and **'Cancel and keep work item in inbox'**.

You can select one of these three options, all of which are described below.

Choose one of the following alternatives

Certify

Reject

Cancel and keep work item in inbox

6. In addition, you can review the PDF version of the Travel Expense Report again by clicking on the **Employee Trip** link under the **Objects and attachments** heading. Once an action is taken and completed from this below list, you will be returned to the inbox.

Trip Expenses 03/03/2017-03/04/2017 to Chattanooga, TN

Choose one of the following alternatives

Certify
Reject
Cancel and keep work item in inbox

Description


Traveler: 00138983 Duck, Daffy
Trip #: 1700000252
Begins: 03/03/2017 08:00:00 Ends: 03/04/2017 17:00:00
Reason: Attend SACUBO conference
Destination: Chattanooga, TN Country: US
Total Cost of Trip (all reimbursements): 1,178.00
Total Advances: 0.00

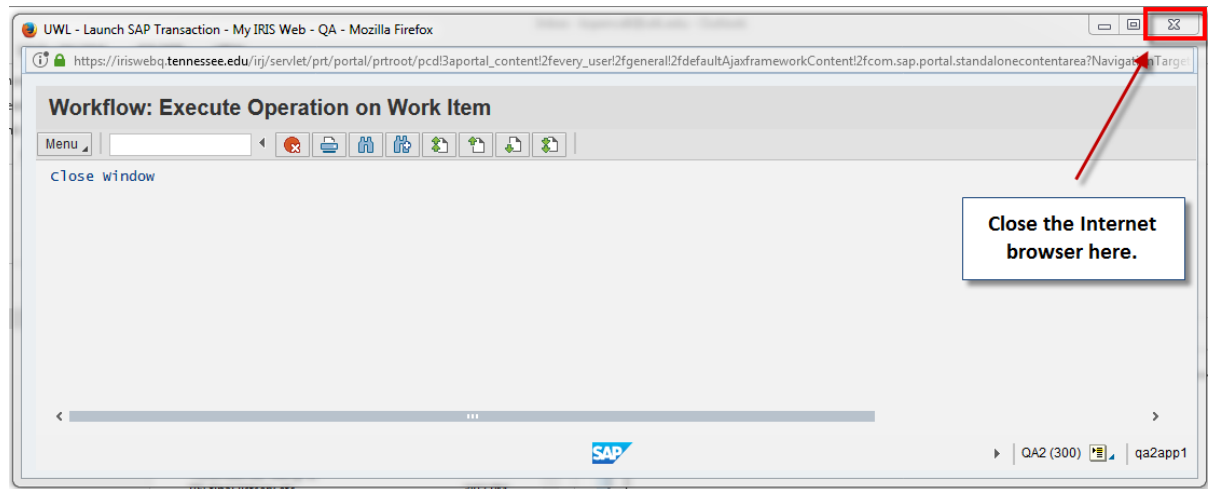
Objects and attachments

- EmployeeTrip: 1700000252
- ImageLink: BUS2089 001389831700000252

- To **certify** the Travel Expense Report, click the **Certify** button, and the Travel Expense Report will be sent to the next step in the approval path.

IMPORTANT TO NOTE: The following pop-up window will be presented after you click **Certify**, and you will need to close it to return to your inbox.

Do not close with the red X icon - . Instead, close the Internet browser window using the X in the upper right corner of the window, as shown below.




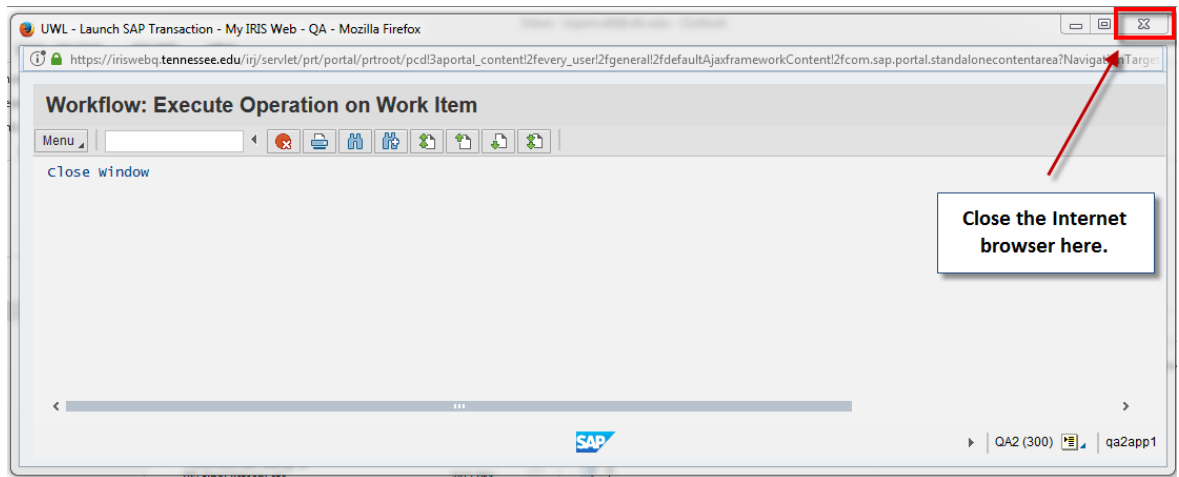
- To **reject** the Travel Expense Report, click the **Reject** button. A reason for your rejection must be added to explain why the Travel Expense Report is being rejected. If a Travel Expense Report is rejected, it will be returned to the user who entered it in IRIS.
- Add the rejection reason in the **Title** field and then click on the green check mark to continue, as shown below. If needed, use the text field on this pop-up window to add additional information concerning the rejection. The rejection reason lets the originator know what changes need to be made to the Travel Expense Report before it is resubmitted.

Justify Your Decision ×

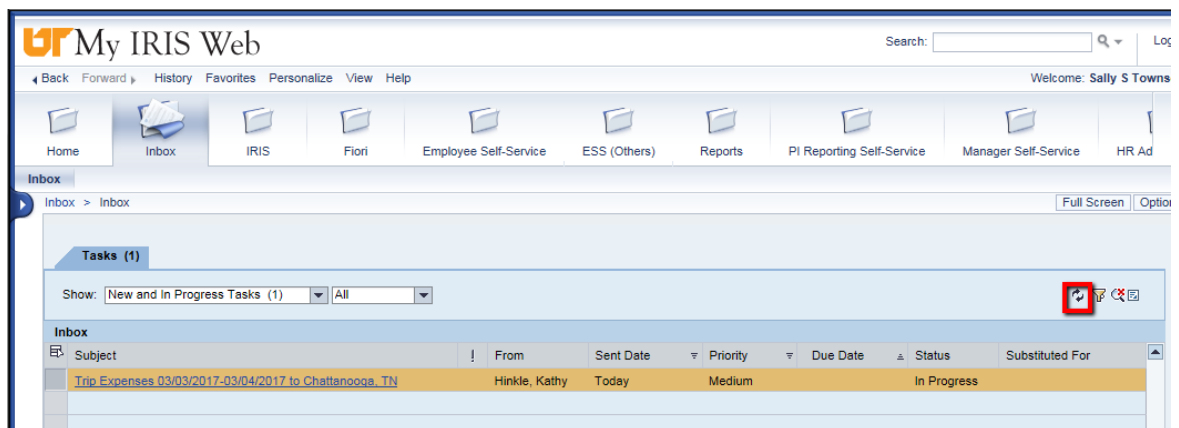
Title

Enter the expenses, add the receipts, and resubmit.


- After you add the rejection reason, close the Internet browser window. **Do not close with the red X icon - . Instead, close the Internet browser window using the X in the upper right corner of the window, as shown below.**

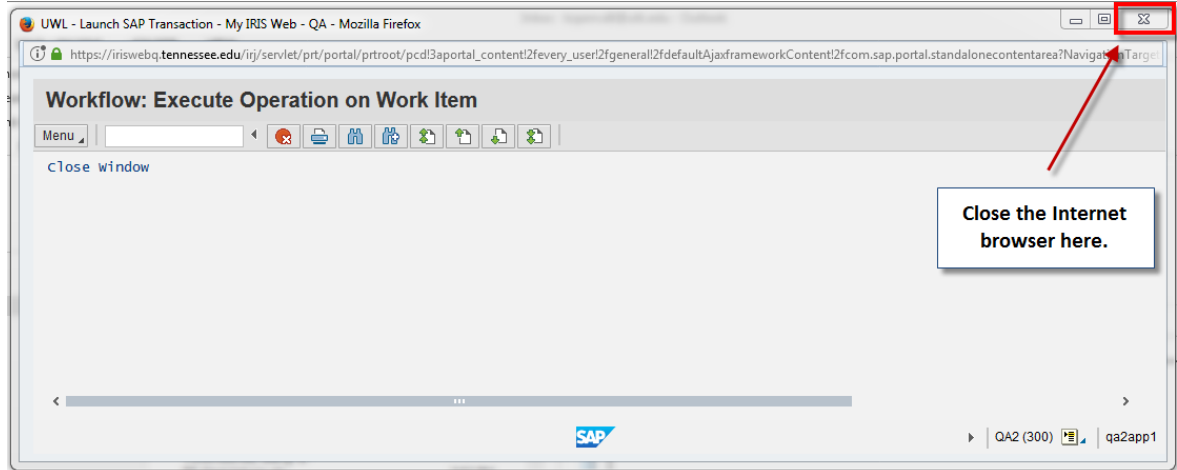


- Once back on the inbox screen, click the **Refresh** icon again.



- After the inbox has been refreshed, and if processed correctly, the rejected work item will disappear from the inbox. This will indicate that the work item was rejected to the originator of the Travel Expense Report.

- If you do not want to certify or reject the work item at that point in time but want to **cancel** and process the work item later, click the **Cancel and keep work item in inbox** button. This option returns you to the inbox without taking any action on the Travel Expense Report. The work item will remain in your inbox until you either certify or reject it.
- Close the Internet browser window. **Do not close with the red X icon - . Instead, close the Internet browser window using the X in the upper right corner of the window, as shown below.**



- If there are other work items in your inbox, click the **Refresh** icon. The work items for certifications, approvals, or rejections that you have already processed will go away, and you can continue with any other work items that require your attention.

