



IRIS System Administrator's Guide

This guide is intended for Resettlement Agency administrators of the Immigration & Refugee Information System (IRIS). NOTE: the functionality described here represents all possible administration features - they may include ones that are not configured for every agency or for every administrator permission.

Last updated on 1/23/2020

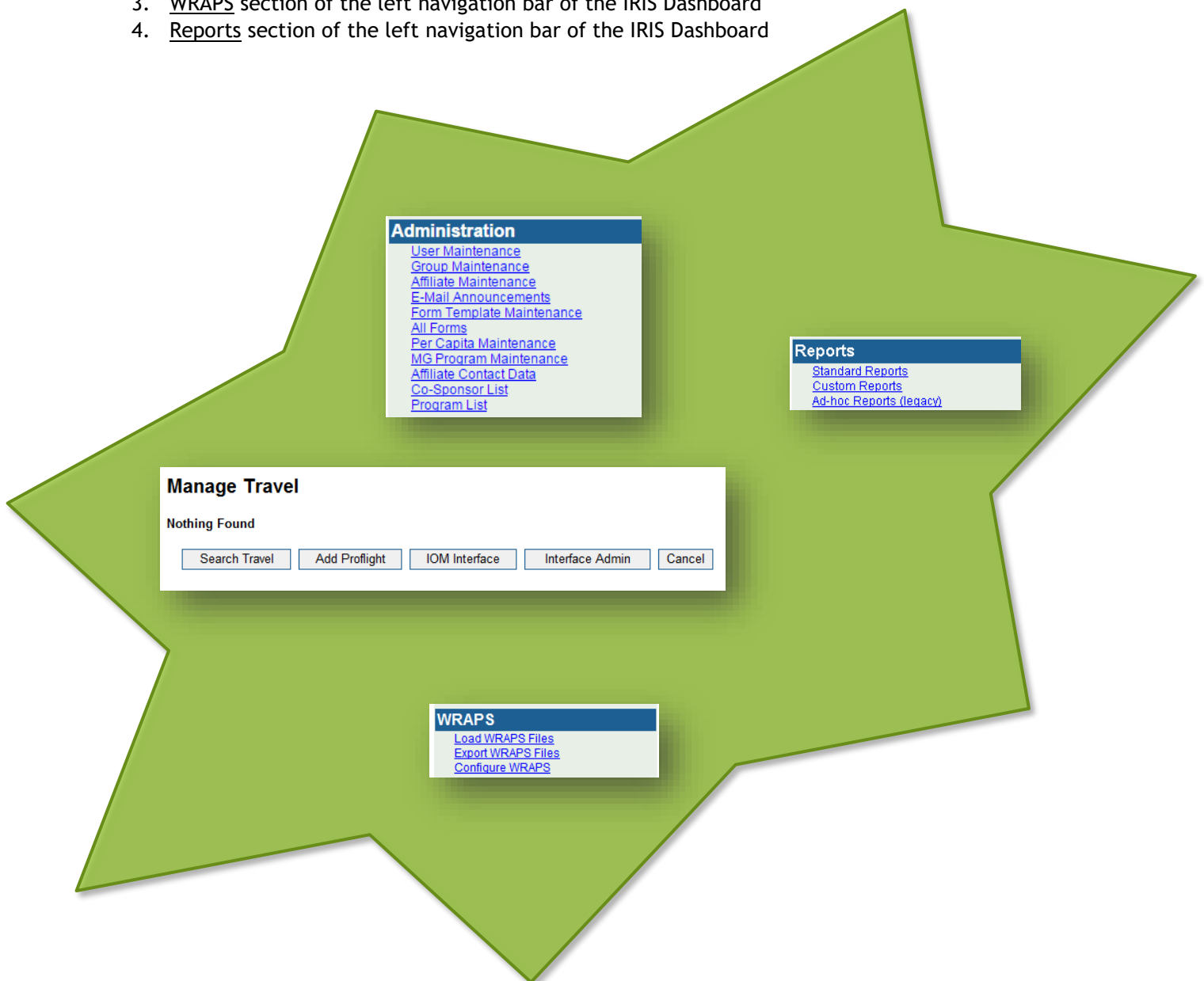
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Introduction

There are four places that Administrative functions are found in IRIS:

1. Administration section of the left navigation bar of the IRIS Dashboard
2. Interface Admin, under Manage Travel
3. WRAPS section of the left navigation bar of the IRIS Dashboard
4. Reports section of the left navigation bar of the IRIS Dashboard

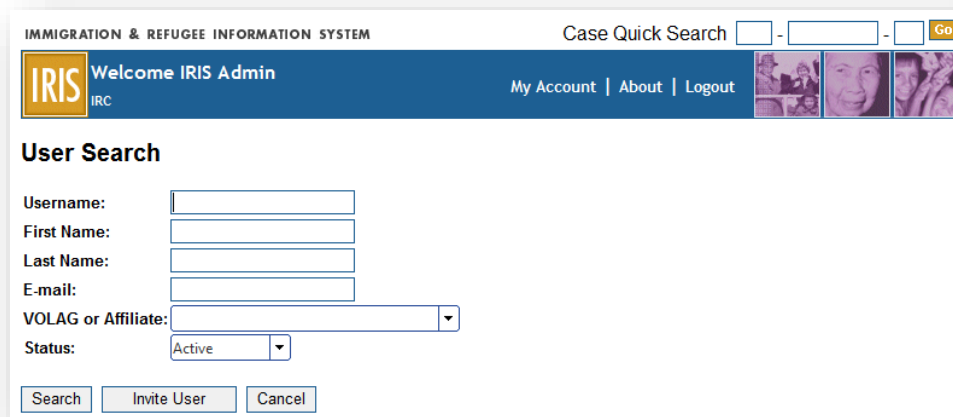


User Maintenance

The User Maintenance function is found in the Administration section of the IRIS left navigation bar. The ability to view and access this link is controlled by the permissions assigned to the account currently logged into IRIS. The User Maintenance function is intended for use by VOLAG HQ staff, Affiliate office supervisors, and/or by System Administrators. This last group is the target audience of this guide.

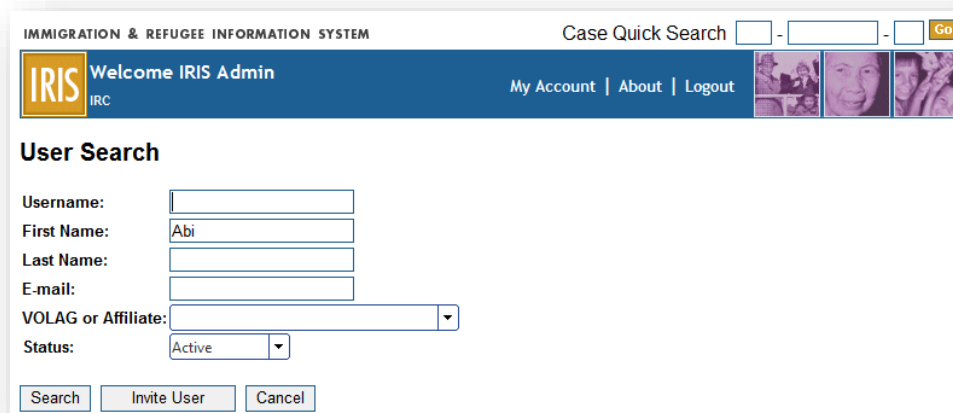
Searching for Users

When you click on the link, IRIS displays a User Search page. This allows you to search for, and edit, any user that you have access to. Generally speaking, VOLAG type users can view or edit all users in the system, while local office users can only view or edit the users assigned to their office or organization.



The screenshot shows the IRIS User Search page. At the top, there is a header bar with the IRIS logo, "Welcome IRIS Admin", and navigation links: "My Account", "About", and "Logout". To the right of the header is a "Case Quick Search" section with two input fields and a "Go" button. Below the header, the "User Search" section contains several input fields: "Username:", "First Name:", "Last Name:", "E-mail:", "VOLAG or Affiliate:" (a dropdown menu), and "Status:" (a dropdown menu with "Active" selected). At the bottom of the search section are three buttons: "Search", "Invite User", and "Cancel".

Clicking on the Search button without entering any criteria will display all users. Enter in some or all of any of the other fields to perform a full field search. For example, if you enter "Abi" in the First Name field, and click the Search button...



This screenshot is identical to the previous one, but the "First Name" field now contains the text "Abi". All other elements, including the header, search fields, and buttons, remain the same.

IRIS will show the users that have "abi" located anywhere in their first name. In this example, three users were found that met that criteria:

IMMIGRATION & REFUGEE INFORMATION SYSTEM Case Quick Search - -

IRIS Welcome IRIS Admin IRC My Account | About | Logout

Search Results

Displaying 1 - 3 of 3 Result(s) (OR) Display results per page.

[\[First Page\]](#) [\[Previous Page\]](#) [\[Next Page\]](#) [\[Last Page\]](#)

Username	First Name	Last Name	Email Address	Affiliate	Status	Emails Allowed?	Last Login
abigailc	Abigail	Clarke-Sayer	Abigail.Clarke-Sayer@rescue.org	International Rescue Committee	Active	Yes	8/21/2013 12:21:04 PM
RabiouM	Rabiou	Manzo	Rabiou.Manzo@their.org	International Rescue Committee-Boise	Active	Yes	8/7/2013 7:58:14 AM
RabiP	Rabi	Poudel	Rabi.Poudel@their.org	International Rescue Committee-Baltimore	Active	Yes	8/7/2013 7:58:14 AM

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The search results show a grid of information about the users that were found, giving you the chance to select the correct one. Note that the first result in the example above is bolded. This indicates that the users has “Supervisor” permissions.

Click on the username link to open up the user’s account record.

Adding and Editing Users: The User Maintenance Page

The elements of the User Maintenance screen are the same both for adding or editing a user.

User Maintenance

Username:

First Name:

Last Name:

Email address: *

Title:

VOLAG or Affiliate: *

Status: *

LDAP Username:

You must select an Affiliate before you can assign Groups.

Assigned Groups << >> Unassigned Groups

☐ Do not send any emails to this account.

☐ This account is locked.

☐ Hide empty notification links on dashboard.

Last Login:

Login Attempts:

Fields marked by an asterisk (*) are required.

User Maintenance

Username:

First Name:

Last Name:

Email address: *

Title:

VOLAG or Affiliate: *

Allow Access to Sub-Offices: ☐ Yes

Status: *

LDAP Username:

Assigned Groups << >> Unassigned Groups

☐ Do not send any emails to this account.

☐ This account is locked.

☐ Hide empty notification links on dashboard.

Last Login: 8/21/2013 12:21:04 PM

Login Attempts: 0

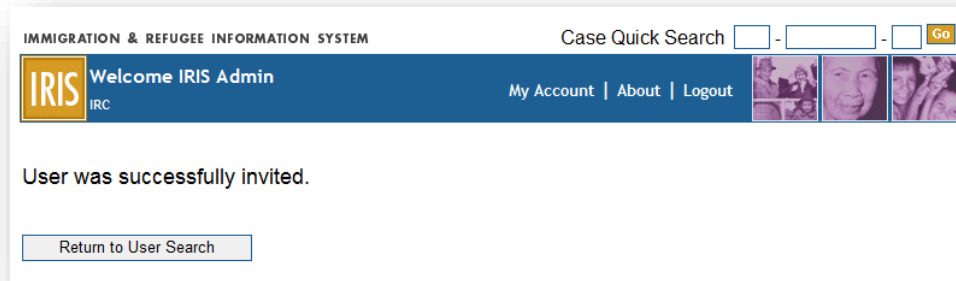
Fields marked by an asterisk (*) are required.

FIELD LABEL	DESCRIPTION
Username:	When adding a new user, this field is read-only. For a non-LDAP user, they will receive an email invitation to join IRIS that will allow them to create their own username. For an LDAP user, the network username is specified in the LDAP Username field below. When editing an existing user, you can change a user's name. Any records in IRIS that have been created or updated by this user will be retained and will reflect the new username.
First Name:	First Name of the user - used to identify the user on the Dashboard and in history records in IRIS
Last Name:	Last Name of the user - used to identify the user on the Dashboard and in history records in IRIS
Email address:	User's email address - IT IS VERY IMPORTANT to create and maintain correct email addresses in IRIS, as email alerts and notifications are one significant way that the system interacts with users.
Title:	User's job title - optional
VOLAG or Affiliate:	Organization that the user is associated with. Selecting the VOLAG will give this user global access to cases. Selecting an affiliate organization will give this user access to cases assigned to that site.
Allow Access to Sub-Offices	If an affiliate organization has one or more sub-offices, and if the affiliate selected above is the Main Office, then this check box will become available. Check it to allow this users to work with all main and sub-office cases. Leave it unchecked to limit access just to the select Main Office site.
Status	Status of the user account - Active (default) or Inactive. Users are not deleted in IRIS, so that the activity history can be maintained. When a user leaves, you can change the account Status to Inactive.
LDAP Username:	If IRIS is configured for LDAP access, then this field is visible and available. To make this an LDAP user, enter the user's network user name. To create a local user (not connected to the agency network), leave this field blank. To switch an existing user from an LDAP user to a local user, clear the field. A dialog box will be displayed for you to confirm the change.
Assigned Groups	Box containing the list of all permissions groups assigned to the user. When setting up a new user, this box will be empty. To remove a permission group from this user, click on the group, and then click the right double arrow button. This will move the group from Assigned to Unassigned.
Unassigned Groups	Box containing the list of all unassigned permission groups available for this user. To add a permission group to this user, click on the group, and then click the left double arrow button. This will move the group from Unassigned to Assigned. You can assign multiple groups at the same time by holding down the Ctrl key when clicking on groups.
Do not send any emails to this account.	Check box that, when clicked, prevents most notifications from being emailed to the user. The exception to this are the emails for User Invitation, User Confirmation and User Forgot Password. In addition, any email that is generated using the Email Announcements feature are sent regardless of the settings for this user.
This account is locked.	For a non-LDAP user, an account is locked when a password is entered incorrectly three times. An unlock email is generated allowing the user to reset their password and unlock the account. Alternately, an administrator can manually unlock the account by unchecking this box.
Hide empty notification links on dashboard.	Check box that either allows or prevents the display of empty notifications on the Dashboard. If the box is unchecked, any notification without at least one item in it is shown grayed out. If the box is checked, these empty notifications simple do not display at all.

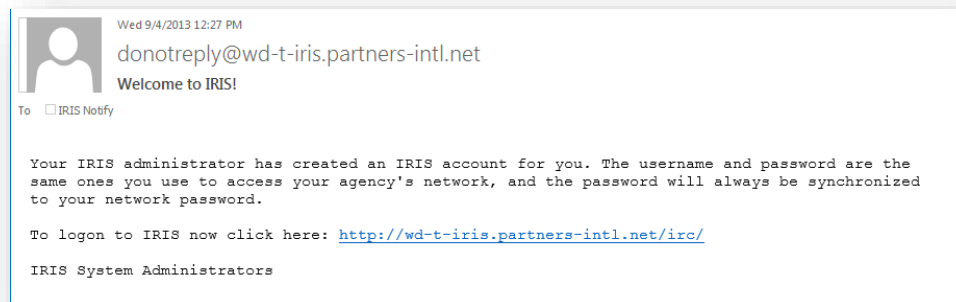
Use the Save button to complete a new user invitation/setup, or to save changes made to an existing user. Use the Cancel button to cancel a new user invitation/setup, or to cancel any changes made to the user but not yet saved.

Completing Adding a New User

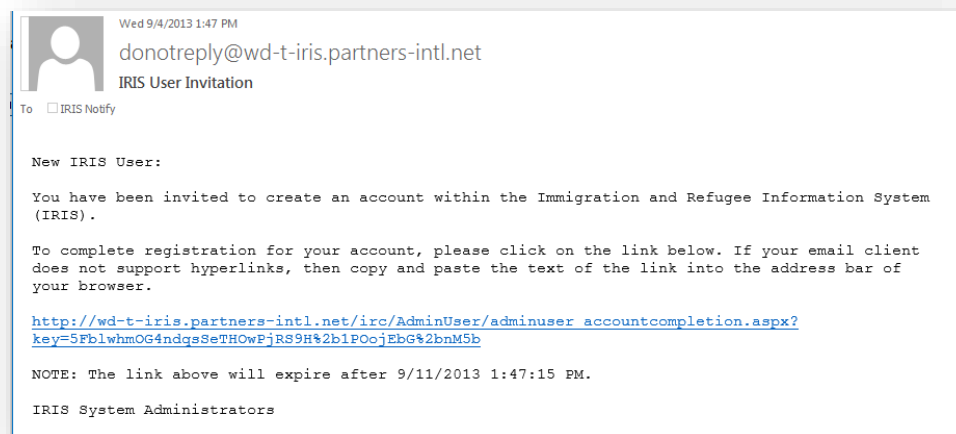
Once you have completed the User Maintenance screen and clicked Save, you should see the following confirmation:



If the new user is an LDAP user, they will receive an email notification that looks like this:



If the new user is a local user, s/he will receive an email containing a link that will allow the person to set up their new username and password in the IRIS system:



WARNING: We have found that after an LDAP user record has been edited, the IRIS system may convert the user to a non-LDAP user. The tell-tale sign will be that the LDAP Username field has been cleared. This can be fixed by re-adding the LDAP Username.

Group Maintenance

Group Maintenance refers to the configuration of permission groups. Permission groups specify which IRIS functions different types of users are able to access, view and/or edit. It is found in the Administration section of the IRIS left navigation bar.

WARNING: Changing Groups can adversely affect existing users! Please to do NOT make changes unless you understand the implications. Also, when making changes, you should do so initially in your IRIS Test environment, so that you can check the new permissions or changes before putting them into IRIS Production.

Viewing and Editing Groups

When you click on the Group Maintenance link, IRIS displays the Groups page, displaying a listing of all existing permission groups.

Groups		
Name	Description	Create Date
AffASAR	Gives ability to run ASAR queries	9/10/2012
AffCaseMgmtStaff	Affiliate Case Management Staff	7/10/2006
AffCaseMgmtStaffMedical	Affiliate Case Management Staff with Medical Permissions	7/10/2006
AffMGStaff	Affiliate MG Staff	6/18/2009
AffSup	Affiliate Supervisor	7/10/2006
AffURM	URM Affiliate User	4/2/2008
AffURMSup	URM Site Supervisor Permissions	2/10/2009
IRISApp	IRIS Application	7/10/2006
IRISUserAdmin	IRIS User Administrator	7/10/2006
LWSStaff	Loan Web-Service Staff	1/22/2009
ReadOnlyOverride	Read Only Override	9/11/2009
VOLAGCaseMgmtStaff	VOLAG Case Management Staff	7/10/2006
VOLAGLoanMgmt	VOLAG Loan Manager	7/10/2006
VOLAGMGStaff	VOLAG Matching Grant Staff	5/19/2008
VOLAGPreArrivalNotifications	Shows Pre-Arrival Notifications	5/13/2011
VOLAGReportsOnly	VOLAG login with access only to reports	1/23/2009
VOLAGRPRReportStaff	R&P Reporting Staff	4/19/2007
<input type="button" value="Add Group"/> <input type="button" value="Cancel"/>		

Click on the link of one of the groups to edit that group, or click the Add Group button to create a new group.

The Zones that are available to select are based on the Organization Type defined for this Group. Some Zones are available only to VOLAG users, some to Affiliate users, and some to Both.

General Zone Guide

Zones change over time; it is beyond the scope of this guide to list and define each one. However, most of the zones contain a prefix that gives a clue as to what section of the program that zone controls:

ZONE PREFIX	STANDS FOR	DESCRIPTION
dshLM	Dashboard/LeftMargin	These general control whether or not a feature is displayed and available in the left navigation bar of the Dashboard. For example, if dshLM_CaseReturn is assigned to this Group, then users with this group assignment can see and open the Return Cases link in the navigation bar.
mem	Member	These zones control viewing and editing of case member data. For example, if memAddressView is assigned, then users with that group could view, but not edit (there is a separate zone for memAddressEdit) case member addresses.
notD	Notification-Dashboard	Assigns this group to view the specified dashboard notification.
notE	Notification-Email	Assigns this group to receive the specified email notification.
unused	Zones that are not implemented or no longer used	These should not be assigned. They will eventually be removed from IRIS

Special Zones

Some zones are used for specific purposes as noted below:

ZONE NAME	DESCRIPTION
AllowMG	This specifies whether the user can see specific MG links, screens, reports and data.
printBIOData	This allows members of the group to access the “Print BioData” button. Since BioData can contain sensitive medical information, it should only be assigned to groups that have members able to view this type of data.
ReadOnlyOverride	If this is assigned to a group, it sets all other assigned zones to “Read Only,” even if the zone specifically allows editing. This zone is typically assigned to a single group, which can be added to an individual user in addition to other groups. Used mainly for non-program staff who need access to view, but not update or delete, data in the system.
iwsGetUpdateData	Do not use! This is an internal zone used in conjunction with API interfaces.
lwsGetUpdateData	Do not use! This is an internal zone used in conjunction with Travel Loan interface.

Affiliate Maintenance

The Affiliate Maintenance function will be used primarily by HQ program staff, but it is important for IRIS System Administrators to know the implications of how Affiliates are configured.

Access Affiliate Maintenance in the Administration section of the IRIS left navigation bar.

Affiliate Maintenance

Displaying 1 - 20 of 29 Result(s) (OR) Display results per page.

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Short Name	WRAPS Affiliate Code	VOLAG Affiliate Code	Abbreviation	Office Type
Phoenix	AZIRC01	PHX	PHX	Main
Tucson	AZIRC02	TUC	TUC	Main
Los Angeles	CAIRC01	LA	LA	Main
San Diego	CAIRC02	SD	SD	Main
Oakland	CAIRC03	OAK	OAK	Main
San Jose	CAIRC05	SJ	SJ	Main
Sacramento	CAIRC08	SAC	SAC	Sub
Turlock	CAIRC11	TRL	TRL	Sub
Orange	CAIRCXW	ORG	ORG	Main
Bakersfield	CAIRCXX	BFL	BFL	Main
Fresno	CAIRCXY	FRE	FRE	Main
Modesto	CAIRCXZ	MOD	MOD	Main
Washington DC	DCIRCXX	DC	DC	Main
Miami	FLIRC01	MIA	MIA	Main
Atlanta	GAIRC01	ATL	ATL	Main
Boise	IDIRC01	BOI	BOI	Main
Wichita	KSIRC01	WCH	WCH	Main
Boston	MAIRCXX	BOS	BOS	Main
Worcester	MAIRCXY	WOR	WOR	Main
Baltimore	MDIRC01	BAL	BAL	Main

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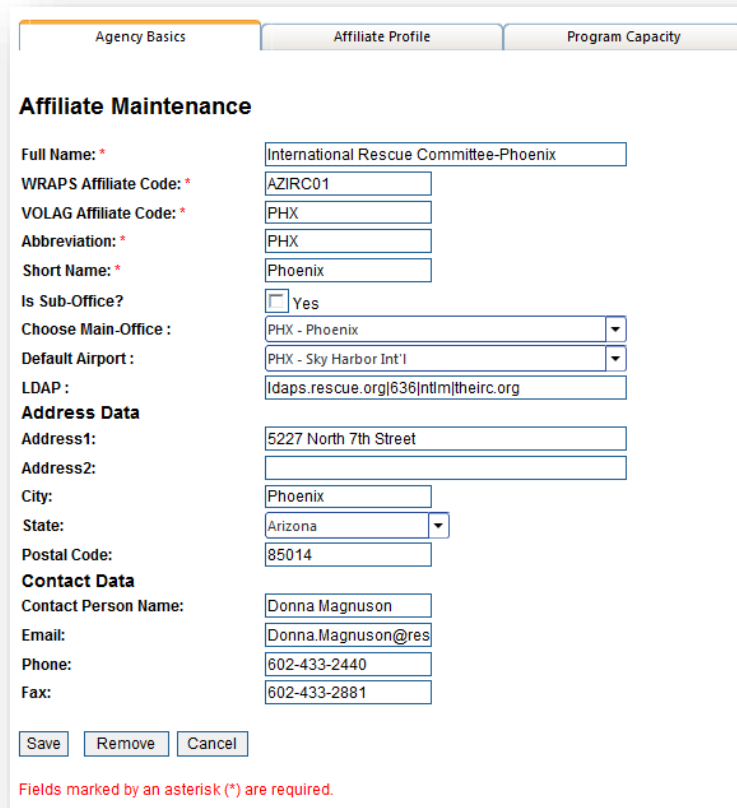
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All affiliates are listed in a summary grid. The default view is to show 20 affiliates at a time on a single screen, with navigation links to subsequent screens of data. If desired, you can change the default using the dropdown at the top of the screen.

Click on the Short Name link to edit an Affiliate, or click the Add Affiliate button to create a new one. Both adding and editing use the same data entry screens.

Each Affiliate has three tabs of data:

- **Agency Basics:** data about the affiliate agency, including names codes, default airport, and contact information.
- **Affiliate Profile:** data about the capabilities and programs of each affiliate office. This data is typically entered by each affiliate office individually.
- **Program Capacity:** data about the involvement and projected (or budgeted) numbers of clients to be served for each fiscal year.



Affiliate Maintenance

Full Name: * International Rescue Committee-Phoenix

WRAPS Affiliate Code: * AZIRC01

VOLAG Affiliate Code: * PHX

Abbreviation: * PHX

Short Name: * Phoenix

Is Sub-Office? ☐ Yes

Choose Main-Office : PHX - Phoenix

Default Airport : PHX - Sky Harbor Int'l

LDAP : ldaps.rescue.org|636|ntlm|their.org

Address Data

Address1: 5227 North 7th Street

Address2:

City: Phoenix

State: Arizona

Postal Code: 85014

Contact Data

Contact Person Name: Donna Magnuson

Email: Donna.Magnuson@res

Phone: 602-433-2440

Fax: 602-433-2881

Save Remove Cancel

Fields marked by an asterisk (*) are required.

Agency Basics Tab

Important information for system administrators:

- In system dropdowns for Affiliates, the values are generally listed as a combination of the **VOLAG Affiliate Code** and the **Short Name** (so, for Phoenix, shown above, it would look like "PHX - Phoenix"). The dropdown sorts on the Short Name.
- An affiliate that is a standalone site should not have a check in the **Is Sub-Office** checkbox. Likewise, you can leave the **Choose Main Office** field blank.
- However, if the site is a sub-office, then check the box and identify the main office. This will allow permissions and reports to work correctly.
- Always identify a default airport. This will pre-populate on the Assurance screen (but can be changed if needed on a case-by-case basis).

Affiliate Profile

We won't address the Affiliate Profile in this Guide.

Program Capacity

There is not a system reason to enter the R&P Fiscal Year information in the Affiliate Profile. The one impact that adding this information has is that the standard reports "FY Arrivals by Affiliate" and "FY Arrivals by Affiliate and Site" will show the goals in comparison to the number of arrivals.

The MG Fiscal Year has more system importance. Since some sites have the Matching Grant program and some do not, and because some sites may have the program one year but not another, IRIS uses the "Enrollment Capacity to determine whether the MG tab is visible in certain cases, and whether new enrollments are allowed.

Note, MG enrollment is restricted only when the entire RA MG capacity is reached.

See the section on MG Program Year Maintenance to set up a whole new fiscal year for MG. Viewing and editing individual affiliate information can be done from this tab.

Phoenix - Program Capacity

R&P Fiscal Year (Oct-Sep)

Year	Free Case Goal	VOLAG Goal	DOS Goal	Revised Goal
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Add

MG Fiscal Year

Fiscal Year	Start Date	End Date	Enrollment Capacity	Per Capita
2013	10/1/2012	9/30/2013	405	\$1,915.00
2012			0	\$1,900.00
2010			0	\$1,900.00
2009			0	\$1,900.00
2008			0	\$1,900.00
2007			0	\$1,900.00
2006			0	\$1,900.00
2005			0	\$1,900.00
2004			0	\$1,900.00
2003			0	\$1,900.00
2002			0	\$1,900.00
2001			0	\$1,900.00
2000			0	\$1,900.00

Add

Cancel

Email Announcements

Email announcements allow certain staff to send broadcast emails to specific groups of users. When you click on the Email Announcements link, you will see the following screen:

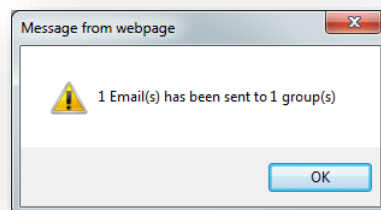
The screenshot shows a web application interface for the 'IMMIGRATION & REFUGEE INFORMATION SYSTEM'. At the top, there is a 'Case Quick Search' bar and a 'Go' button. Below this is a navigation bar with the 'IRIS' logo, the user's name 'Welcome Patrick Nowlan', and links for 'My Account', 'About', and 'Logout'. The main heading is 'Send E-Mail Announcement Notifications to Groups'. Below this heading is a list of user groups with checkboxes next to them, organized in three columns. The groups include: Affiliate Case Management Staff, Affiliate Case Management Staff with Medical Permissions, Affiliate Cultural Orientation, Affiliate MG Staff, Affiliate Supervisor, URM Affiliate User, URM Site Supervisor Permissions, Custom Report Affiliate Admin, Custom Report Affiliate Viewer, Custom Report RA Admin, Custom Report RA Viewer, Custom Report Super Admin, IRIS Application, IRIS User Administrator, Loan Web-Service Staff, Read Only Override, VOLAG Case Management Staff, VOLAG Cultural Orientation, VOLAG Loan Manager, Generate MG file and update email recipients, VOLAG Matching Grant Staff, Shows Pre-Arrival Notifications, VOLAG login with access only to reports, and R&P Reporting Staff. Below the list of groups are three input fields: 'Subject: *' with a text box, 'Attachment(s):' with three 'Choose File' buttons (each showing 'No file chosen'), and 'Body: *' with a large text area. At the bottom left are 'Send' and 'Cancel' buttons.

Check the boxes of any user groups that should receive the message. If a user is a member of multiple groups, they will only receive a single copy.

Then complete the subject and the body. The message is sent in Plain Text, but any URL address or email address will, for most recipients, be translated into a hyperlink.

Optionally, attach up to three files.

When you are finished, click the Send button to send the message. A confirmation dialog will be displayed that looks similar to this:



Note: once you click the OK button on the confirmation dialog, you will be returned to the email screen that you just completed (and sent). If you wanted to send the same message to a different group, you could make those adjustments and click on Send again. Otherwise, click the Cancel button to exit the screen.

Form Template Maintenance

Form Template Maintenance allows you to create and update informational documents and downloadable forms for IRIS users. These documents and forms can be associated with the specific, applicable section of a case or a process. For instance a 90-Day Minor Follow-Up Evaluation applies to individuals (so that there is one available to each case member), rather than a case.

Form Template Maintenance			
Name	Type	Update Date	Update User
5-Day Home Visit Checklist	Case	9/27/2012	VOLAG User
30-Day Home Visit Checklist	Case	9/27/2012	VOLAG User
30-Day Minor Home Visit Assessment (Computer)	Individual	9/27/2012	VOLAG User
30-Day Minor Home Visit Assessment (Print)	Individual	9/27/2012	VOLAG User
90-Day Minor Follow-Up Evaluation (Computer)	Individual	9/27/2012	VOLAG User
90-Day Minor Follow-Up Evaluation (Print)	Individual	9/27/2012	VOLAG User
90-Day Minor Follow-Up Evaluation	Individual	9/27/2012	VOLAG User
Assistance Agreement	Anchor	9/27/2012	VOLAG User
Close-Out Checklist	Case	9/27/2012	VOLAG User
Core Services Checklist	Case	9/27/2012	VOLAG User
Home Safety Checklist	Case	9/27/2012	VOLAG User
I-94 Nag Memo (Template)	Case	9/27/2012	VOLAG User
I-94 Nag Memo (Word Doc)	Case	9/27/2012	VOLAG User
MG Close-Out (Word Doc)	Matching Grant Case	9/27/2012	VOLAG User
MG Close-Out (Template)	Matching Grant Case	9/27/2012	VOLAG User
Minor Follow-Up Evaluation	Case	9/27/2012	VOLAG User
Minor Placement Evaluation (Computer)	Case	9/27/2012	VOLAG User
Minor Placement Evaluation (Print)	Case	9/27/2012	VOLAG User
Minor Statement of Responsibility	Case	9/27/2012	VOLAG User
Minor Suitability Determination	Case	9/27/2012	VOLAG User
Non-Employable Resettlement Plan (Word Doc)	Case	9/27/2012	VOLAG User
Non-Employable Resettlement Plan (Template)	Case	9/27/2012	VOLAG User

When you click on the Form Template Maintenance link, the Form Template Maintenance screen is displayed, showing all of the documents/forms that are currently in the system. Click on a Name link to open and edit a particular form, or click the Add New Form Template button to create a new one

The image displays two side-by-side screenshots of the 'Form Template Maintenance' dialog box, which is titled 'Webpage Dialog'.

Left Screenshot (Add New Form):

- Name:** * (Required field, empty text box)
- Type:** * (Required field, dropdown menu showing 'Select a Type')
- File:** * (Required field, empty text box with a 'Browse...' button next to it)
- Allow Multiples:** (Unchecked checkbox)
- Attachment Type:** (Radio buttons)
 - ☒ Attachable - A template to be completed and attached; may also have guidance.
 - ☐ Informational - A document for guidance or printing only.
- Buttons: [Save] [Cancel]
- Footnote: Fields marked by an asterisk (*) are required.

Right Screenshot (Edit Existing Form):

- Name:** * (Required field, text box containing '5-Day Home Visit Checklist')
- Type:** * (Required field, dropdown menu showing 'Case')
- Current File:** (Text box containing 'Filename: 5-Day Home Visit Checklist.dot' and 'Last edited on 9/27/2012 by VOLAG User')
- New File: (replaces current file)** (Empty text box with a 'Browse...' button next to it)
- Allow Multiples:** (Unchecked checkbox)
- Attachment Type:** (Radio buttons)
 - ☒ Attachable - A template to be completed and attached; may also have guidance.
 - ☐ Informational - A document for guidance or printing only.
- Buttons: [Save] [Cancel] [Remove]
- Footnote: Fields marked by an asterisk (*) are required.

The elements of the Form Template dialog box are the same for adding a new record and for editing an existing one:

FIELD LABEL	DESCRIPTION
Name:	The label that IRIS users will see that refers to this document or form
Type:	<p>The type determines where the document or form will be made available in IRIS. The values are:</p> <ul style="list-style-type: none"> - Anchor → Anchor Forms link under Case/Pre Arrival/Assurance/Anchors - AOR → Supporting Documentation tab under AOR - Assurance → Assurance Forms tab under Case/Pre Arrival/Assurance - Cosponsor → Cosponsor Forms link under Case/Pre Arrival/Assurance/Cosponsors - Individual → Client Forms tab under Post Arrival/Client Data/[client] - Matching Grant Case → Case Forms tab under Post Arrival/Matching Grant/[case] - Organization → Not assigned, only available under “All Forms” (Dashboard) - Case → Case Forms tab under Post Arrival - Interest → Supporting Documentation tab under Interest
Current File:	If adding a new Form, this will be blank. If editing an existing Form, this is the link to view the current uploaded version.
New File (replaces current file)	If adding a new Form, click the Browse button and select the document or form. If you do this for an existing form, it will replace the Current File, with the New File.
Allow Multiples:	In each location where the form is available, you can specify the behavior when a user tries to upload a form that is already in the system. If Allow Multiples is checked, users can upload multiple versions/copies of the same form. If it is not checked, then when a user uploads a document that already exists, the new one will overwrite the existing one.
Attachment Type:	<p>Two types of attachment:</p> <ul style="list-style-type: none"> - Attachable specifies a form that users may download, complete, and then upload and attach to the IRIS case. - Informational specifies a document that users can download but not upload or attach to a case. This can be used for guidance documents.

In addition to the standard Save and Cancel buttons, you also have the Remove button available here. As the name indicates, use this to remove the form from the system. Any documents of this type that have been uploaded previously will still be available, but the document will no longer be available for download or future uploads.

Per Capita Maintenance

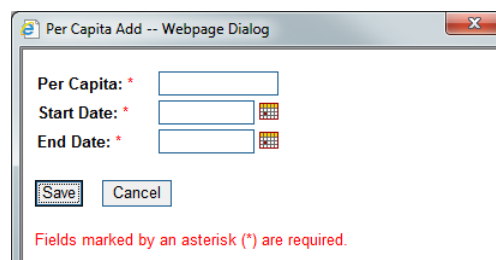
Per Capita Maintenance refers to the R&P Program's minimum funds amount to be distributed to refugees in that program. Each time a change in the program occurs, you should update this section to reflect the new amount.

In the screenshot below, you can see how the amounts have changed over time. Note that the current Per Capita amount has no end date. This is left empty until a new record is added, at which time the current active record can be ended.

Per Capita Maintenance


Per Capita	Start Date	End Date
\$925.00	10/1/2011	
\$900.00	1/1/2010	9/30/2011
\$425.00	1/1/1970	12/31/2009


To add a new per capita record, click the Add button, enter the new dollar amount and click the Save button.



Per Capita Add -- Webpage Dialog

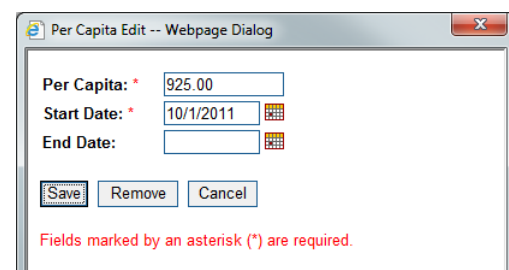
Per Capita: *

Start Date: * 

End Date: * 


Fields marked by an asterisk (*) are required.


To edit an existing per capita record, click the link for that amount, and edit the screen as needed. As mentioned before, you would typically edit an existing per capita record to add the End Date after you have created a new record.



Per Capita Edit -- Webpage Dialog

Per Capita: *

Start Date: * 

End Date: 

Fields marked by an asterisk (*) are required.

The IRIS system must know the amounts and time periods in order to assess payments made and reported on the R&P Period Report. The current Per Capita amount is used to flag whether the minimum expected R&P funds were distributed to the refugee/family within the first 90 days, and to require a case worker explanation if they were not.

MG Program Maintenance

The MG Program Maintenance function allows you to quickly set up a new MG Program/Reporting/Fiscal Year in IRIS. In addition, because of the way that reporting is handled, in typically three year grant cycles, this screen is where you can associate each of the MG Fiscal Years with the appropriate Program Cycle Group.

In the screenshot below, you can see that 2008, 2009 and 2010 are grouped together into a single Program Cycle. When reports are run, IRIS will use this grouping to properly carry over (or not carry over) data between Fiscal Years.

MG Program Maintenance

MG Fiscal Year and Cycle

Program Cycle	Fiscal Year	Start Date	End Date
PC 3	2013	10/1/2012	9/30/2013
	2012	10/1/2011	9/30/2012
PC 2	2010	2/1/2010	12/31/2011
	2009	2/1/2009	1/31/2010
	2008	2/1/2008	1/31/2009
PC 1	2007	1/1/2007	1/31/2008

Add

Adding a New MG Fiscal Year

To add a new fiscal year, click the Add button. A dialog box is displayed:

Complete the Fiscal Year, and the Start and End Dates. ORR, which administers the Matching Grant Program, has, in past years, redefined the starting and ending dates. IRIS was built to accommodate these changes, even allowing overlapping dates.

If you are adding the new Fiscal Year to an existing Program Cycle, select No for “New Program Cycle” and use the dropdown to select the Program Cycle that this Fiscal Year will be a part of.

If the new Fiscal Year is also the start of a new Program Cycle, select Yes for “New Program Cycle.” IRIS will assign the new Program Cycle a number (which is used as an internal identification number in IRIS only).

MG Program Maintenance

MG Fiscal Year and Cycle

Program Cycle	Fiscal Year	Start Date	End Date
PC 3	2014	10/1/2013	9/30/2014
	2013	10/1/2012	9/30/2013
	2012	10/1/2011	9/30/2012

Editing an MG Fiscal Year

To edit a Fiscal Year, just click on the year link. A dialog box will appear. Complete or make changes and then click the Save button to save the record.

MG Fiscal Year Maintenance -- Webpage Dialog

Fiscal Year: * 2014

Start Date: * 10/1/2013

End Date: * 9/30/2014

Default Per Capita: 0

Program Cycle: * PC 3

Save Remove Cancel

Fields marked by an asterisk (*) are required.

MG Fiscal Year Maintenance -- Webpage Dialog

Fiscal Year: * 2014

Start Date: * 10/1/2013

End Date: * 9/30/2014

Default Per Capita: 1915

Program Cycle: * PC 3

Save Remove Cancel

Fields marked by an asterisk (*) are required.

Once you have added or edited a new year, the bottom section of the screen will change to that year, to allow you to enter slots and per capita amounts for each local office.

Editing Enrollment Slots and Per Capita for a Fiscal Year

When first viewed, the grid is read-only. Click the Edit button at the bottom of the grid to allow changes. NOTE: this screen allows easy adding or editing of MG slots. You can also access and update this information for each office via the Affiliate Maintenance screen for that office.

MG Program Capacity by Affiliate Fiscal Year 2014

Affiliate	Enrollment Capacity	Per Capita
Abilene	0	\$0.00
Atlanta	0	\$0.00
Bakersfield	0	\$0.00
Baltimore	0	\$0.00
Boise	0	\$0.00
Boston	0	\$0.00
Charlottesville	0	\$0.00
Dallas	0	\$0.00
Washington DC	0	\$0.00
Wichita	0	\$0.00
Worcester	0	\$0.00

Total Enrollment Capacity 0

Edit Cancel

Enter the slots and Per Capita amount for each affiliate with a Matching Grant program, and then click the Save button to complete the process.

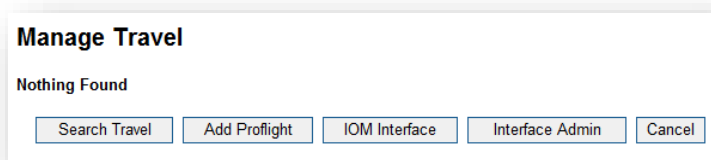
MG Program Capacity by Affiliate Fiscal Year 2014

Affiliate	Enrollment Capacity	Per Capita
Abilene	0	0
Atlanta	0	0
Bakersfield	0	0
Baltimore	0	0
Boise	0	0
Boston	0	0
Charlottesville	0	0
Dallas	0	0
Fresno	0	0
Los Angeles	0	0
Miami	0	0
Modesto	0	0
New Jersey	0	0
New York	0	0
Oakland	0	0
Orange	0	0
Phoenix	0	0
Sacramento	0	0
Salt Lake City	0	0
San Diego	0	0

IOM Interface Administration

Unlike other administrative functions that are located directly on the Dashboard navigation bar, the IOM Interface Administration screen is accessed from within the Manage Travel section located under Case Management.

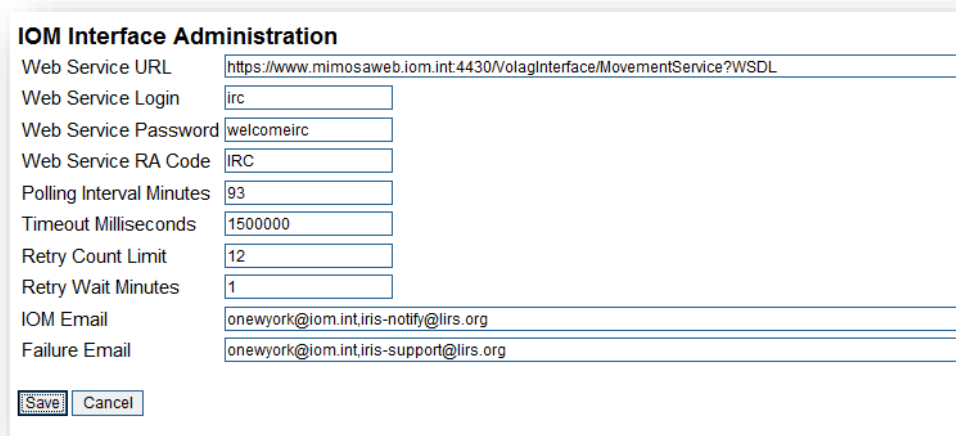
When you click on the Manage Travel link you would typically see a page of upcoming travel, with action buttons at the bottom of the screen. The example screen shown below is from a fresh installation of IRIS, so the upcoming travel is not displayed:



Manage Travel

Nothing Found

Click on the Interface Admin button to access the IOM Interface Administration Screen:



IOM Interface Administration

Web Service URL

Web Service Login

Web Service Password

Web Service RA Code

Polling Interval Minutes

Timeout Milliseconds

Retry Count Limit

Retry Wait Minutes

IOM Email

Failure Email

The elements of the screen are described below.

FIELD LABEL	DESCRIPTION
Web Service URL	Web address of IOM's web server used to provide travel data to IRIS
Web Service Login	User name of resettlement agency/VOLAG used to authenticate to web server
Web Service Password	Password assigned to resettlement agency/VOLAG to authenticate to web server
Web Service RA Code	Code that identifies the agency; this is how IRIS knows which travel to import
Polling Interval Minutes	How long to wait between the automatic polling for latest travel data? Note: IOM has requested that this be no shorter than every 30 minutes.
Timeout Milliseconds	Once the connection to the web server is made, how long does it wait without a response before timing out? Note: 1 minute = 60,000 milliseconds. In the screenshot above, the timeout is 25 minutes.
Retry Count Limit	If the automated process to get latest data fails, IRIS will attempt to retry, requesting all data since the last successful import. This is the number of retries before it finally gives up.
Retry Wait Minutes	How long to wait between retries?
IOM Email	When IOM sends data to the wrong agency, incorrect final destination or affiliate information, this is the email address that will receive the correct information. Note: you can set multiple addresses, separated by a comma.
Failure Email	When the automated process and all retries fail, this is the email address(es) that will receive the alert. Separate multiple addresses with a comma.

Once any changes have been made, click the Save button to save them to IRIS. Note: when you click “Save” it will appear that nothing has happened, but the changes have been saved. You can then click the Cancel button to return to the Manage Travel screen.

WRAPS Configuration

The WRAPS Configuration function is found under the WRAPS section of the left navigation bar on the IRIS Dashboard. Use this screen to set the email addresses.

The elements of this screen are described below:

FIELD LABEL	DESCRIPTION
AOR Email Address	NOT USED
Assurance Email Address	Should always include incoming-datafiles@wrapsnet.org; add other addresses separated by a comma to send copies of this email/file.
Interest File Email Address	NOT USED
R&P Report Email Address	NOT USED
180 Day Report Email Address	NOT USED
Assurance Waiver Email Address	Should always include assurances@wrapsnet.org; add other addresses separated by a comma to send copies of this email/file.
Case Transfer Email Address	Should always include transfers@wrapsnet.org; add other addresses separated by a comma to send copies of this email/file.
R&P Period Report Email Address	Should always include incoming-datafiles@wrapsnet.org; add other addresses separated by a comma to send copies of this email/file.

Multi-Factor Authentication

Multi-factor authentication provides additional information security by requiring a second factor in the form of a verification code. The verification code is sent to an IRIS user by email. The code is only required once for a given location or computer. If you change computers or work location then the verification code will be required again.



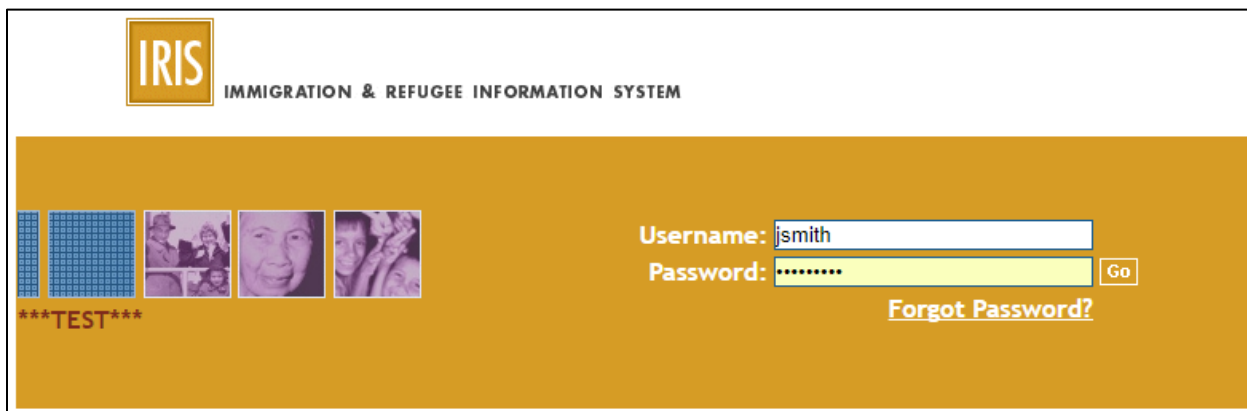
The image shows the login page for the IRIS (Immigration & Refugee Information System). At the top left is the IRIS logo, which consists of the letters "IRIS" in white on a blue square background, followed by the text "IMMIGRATION & REFUGEE INFORMATION SYSTEM" in a smaller, black, sans-serif font. Below the logo, on the left, is a blue grid icon and three small portrait photos of people. To the right of these is a large blue rectangular area. Inside this area, the text "Username:" is followed by a text input field containing "jsmith". Below that, the text "Password:" is followed by a password input field with masked characters "*****". To the right of the password field is a small blue button with the text "Go". Below the password field, the text "Forgot Password?" is displayed as a link. At the bottom left of the blue area, the text "***TEST***" is visible.

Figure 1. First enter user name and password

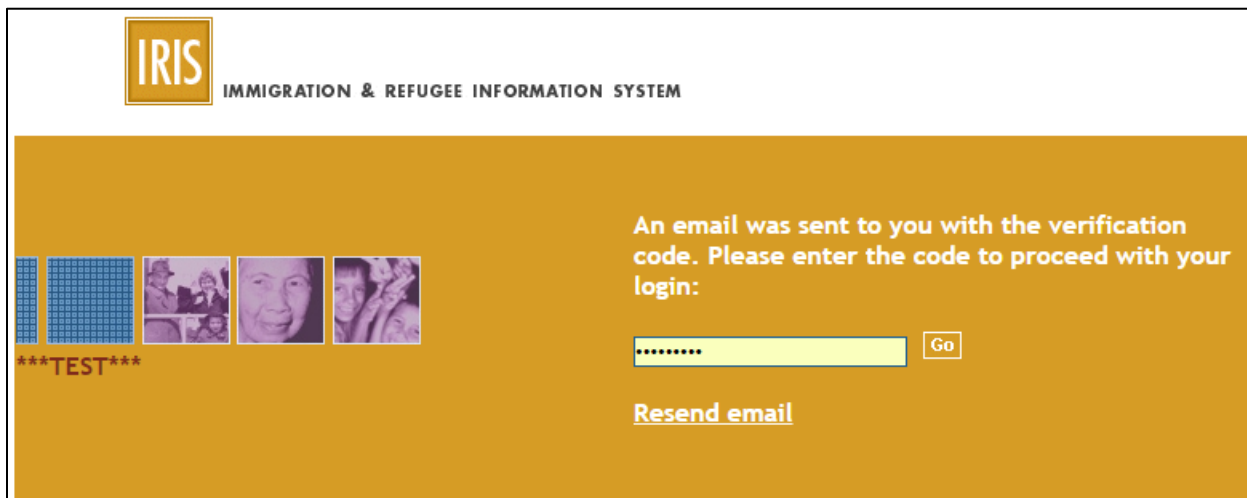
The image shows the verification page for the IRIS system. It has the same header as Figure 1, with the IRIS logo and the text "IMMIGRATION & REFUGEE INFORMATION SYSTEM". Below the logo, on the left, is a blue grid icon and three small portrait photos of people. To the right of these is a large blue rectangular area. Inside this area, the text "An email was sent to you with the verification code. Please enter the code to proceed with your login:" is displayed. Below this text is a text input field with masked characters "*****". To the right of the input field is a small blue button with the text "Go". Below the input field, the text "Resend email" is displayed as a link. At the bottom left of the blue area, the text "***TEST***" is visible.

Figure 2. Second enter verification code send in an email.

Below is a sample email message with the verification code

Subject: IRIS Verification Code
Message:
123456 is your IRIS verification code.
This is an automated message from IRIS.

Thank you,
IRIS System Administrators

Admin Configuration

The Admin Configuration section of IRIS makes it possible to update IRIS variables through the User Interface rather than relying on IRIS Support to do the updates directly in the database. It is recommended that only a few power users per RA be given permission to this functionality. Modifications to the data in the Admin Configuration section should be completed with abundant caution, since much of it contains system configuration information that is needed by IRIS to run properly.

To assign this role to an IRIS user, add the “AdminConfig” group to the user’s Assigned Groups in User Maintenance.

The screenshot displays the 'User Maintenance' page in the IRIS system. The header includes the 'IMMIGRATION & REFUGEE INFORMATION SYSTEM' title, a 'Case Quick Search' bar, and a welcome message for 'Darlene Boblooch'. Navigation links for 'My Account', 'About', and 'Logout' are present. The user's profile information is shown with fields for Username, First Name, Last Name, Phone Number, Email address, Title, and Organization. The 'Allow Access to Sub-Offices' checkbox is checked, and the status is 'Active'. Below this, the 'Assigned Groups' list includes 'VOLAGCaseViewer', 'VOLAGQuarterlyConsultation', 'AdminConfig' (highlighted), and 'VOLAGProgramManagement'. The 'Unassigned Groups' list includes 'VOLAGReportsOnly', 'ReadOnly', 'Custom Report RA Admin', and 'Custom Report RA Viewer'. At the bottom, there are checkboxes for email notifications, account lock status, and notification links, along with login information and 'Save'/'Cancel' buttons. A red note at the bottom states: 'Fields marked by an asterisk (*) are required.'

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Case Quick Search [] - [] - [] **Go**

IRIS Welcome Darlene Boblooch

My Account | About | Logout

User Maintenance

Username: dboblooch

First Name: Darlene

Last Name: Boblooch

Phone Number: 410-230-2711

Email address: * dboblooch@lirs.org

Title: Technical Business Analyst

Organization: * Lutheran Immigration And Refugee Service

Allow Access to Sub-Offices: ☒ Yes

Status: * Active

Assigned Groups

- VOLAGCaseViewer
- VOLAGQuarterlyConsultation
- AdminConfig**
- VOLAGProgramManagement

Unassigned Groups

- VOLAGReportsOnly
- ReadOnly
- Custom Report RA Admin
- Custom Report RA Viewer

☒ Do not send any emails to this account.

☐ This account is locked.

☐ Hide empty notification links on dashboard.

Last Login: 11/8/2019 10:42:19 AM

Login Attempts: 0

Save **Cancel**

Fields marked by an asterisk (*) are required.

The Admin Configuration functionality can be accessed from the dashboard.

IMMIGRATION & REFUGEE INFORMATION SYSTEM

Welcome Darlene Boblooch
LIRS
My

Pre-Case Processing

[Advanced Search](#)
[Receive Approved Lautenberg AORs](#)
[Submit AORs](#)

Case Management

[Advanced Search](#)
[Place Cases](#)
[Transfer a Case](#)
[Case Transfer Out Search](#)
[Manage Travel](#)
[Reconcile Arrivals](#)

Travel Loan

[Export Loan System Files](#)

R&P Reporting

[R&P Period Report Console](#)
[Minor Report Console](#)

Administration

[User Maintenance](#)
[Group Maintenance](#)
[Affiliate Maintenance](#)
[E-Mail Announcements](#)
[Form Template Maintenance](#)
[All Forms](#)
[RP Program Maintenance](#)
[Custom Fields Maintenance](#)
[End User License Maintenance](#)
[IP Address Maintenance](#)
[Admin Configuration](#)
[Affiliate Contact Data](#)
[Co-Sponsor List](#)

Notifications

Pre-Case Processing

[AORs Sent by Affiliate \(4\)](#)
[AORs Submitted to RPC/RSC](#)
[NEW AOR Pre-Case Notes](#)
[NEW Interest Pre-Case Notes](#)
[Minor Aging/Aged Out \(9\)](#)
[P3 Filing Deadline \(7\)](#)
[AOR Stages \(108\)](#)
[AOR Activities \(1\)](#)
[AOR Activity Acknowledgement \(58\)](#)

Case Composition Alerts

[Split Cases & Members Added](#)

R&P Pre-Arrival

[ALL Cases To Be Assured \(5\)](#)
[Assurance Date Approaching \(](#)
[Assurance Date Passed](#)
[Assurance Inactivated \(7\)](#)
[Assurance Ready](#)
[Cases Returned by Affiliate](#)
[NEW Cases \(15\)](#)
[Unassured Placement Exceptio](#)
[Allocated Minors \(1\)](#)
[Minors Who Aged Out Prior To](#)
[Unarrived URM's About To Age](#)
[Co-Sponsors Added or Modifie](#)

IMMIGRATION & REFUGEE INFORMATION SYSTEM


Case Quick Search - -

IRIS

Welcome Darlene Boblooch

LIRS

[My Account](#) | [About](#) | [Logout](#)



Admin Configuration

Admin Configuration History

Admin Configuration

Pre-Case

Wraps Export

Travel

System Configuration

Minor Suitability

Cultural Orientation

Quarterly Consultation

Matching Grant

Reception & Placement

Assurance Signature

Save

Cancel

Click the blue plus sign to open the section you wish to change and make your changes. Click the Save button at the bottom of the screen to save your changes. For example, if you wish to change the PRM Transfer email address, open the Wraps Export section, modify the data in the correct field and click Save.



Welcome RA BOBLOOCH

TEST

[My Account](#) | [About](#) | [Logout](#)

Admin Configuration

Admin Configuration History

Admin Configuration

Successfully saved new values

Pre-Case

Wraps Export

AssuranceFileEmailTo:	<input type="text" value="iris-test@lirs.org"/>
AssuranceWaiverEmailTo:	<input type="text" value="iris-test@lirs.org"/>
CaseTransferEmailTo:	<input type="text" value="iris-test@lirs.org"/>
PRMTransferAddress:	<input type="text" value="iris-test@lirs.org"/>
Report180DayFileEmailTo:	<input type="text" value="iris-test@lirs.org"/>
Report90DayFileEmailTo:	<input type="text" value="iris-test@lirs.org"/>
ReportPeriodFileEmailTo:	<input type="text" value="iris-test@lirs.org"/>

Travel

System Configuration