



**IMMIGRATION & REFUGEE INFORMATION SYSTEM**



# **IRIS**

## **User's Guide: The Basics**

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## Introduction

### What is IRIS?

IRIS – the Immigration & Refugee Information System – is a web-based application designed to electronically assist in the processing and management of refugee and non-refugee cases between the VOLAG national staff, each of the VOLAG's affiliates, and the Refugee Processing Center.

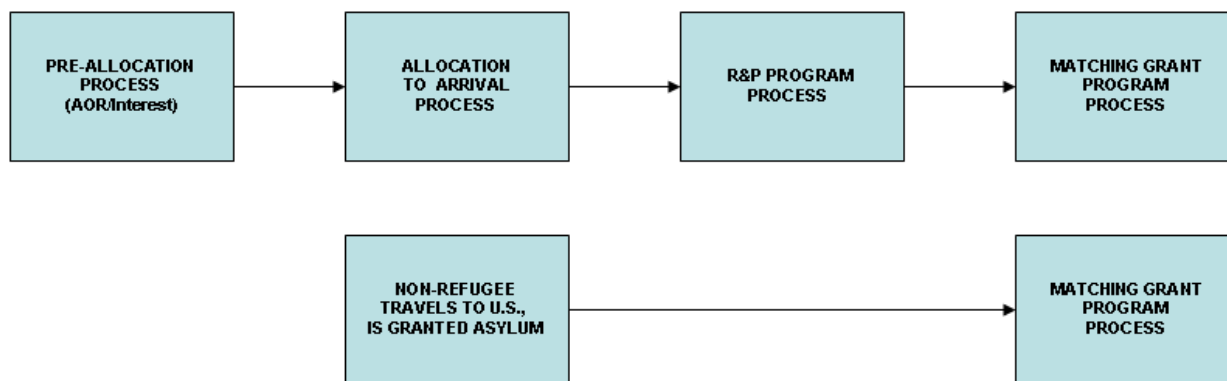
The benefits that are gained by use of IRIS include:

- Time savings
  - AORs processed and submitted more quickly,
  - Case management time redirected from paperwork to working with clients
  - Shorter learning curve for new staff members
- Improved accuracy and timeliness of data collected and reported
- Centralized system means that data need only be entered once, rather than maintained in multiple systems.
- Access to IRIS – with appropriate permissions – from any Internet-connected computer

### The Process

IRIS automates the following processes:

- Refugee Pre-Allocation Process
  - AORs
  - Interests
- Allocation, Assurance, Travel, Arrival
- R&P Program Case Management
- Matching Grant Program Case Management



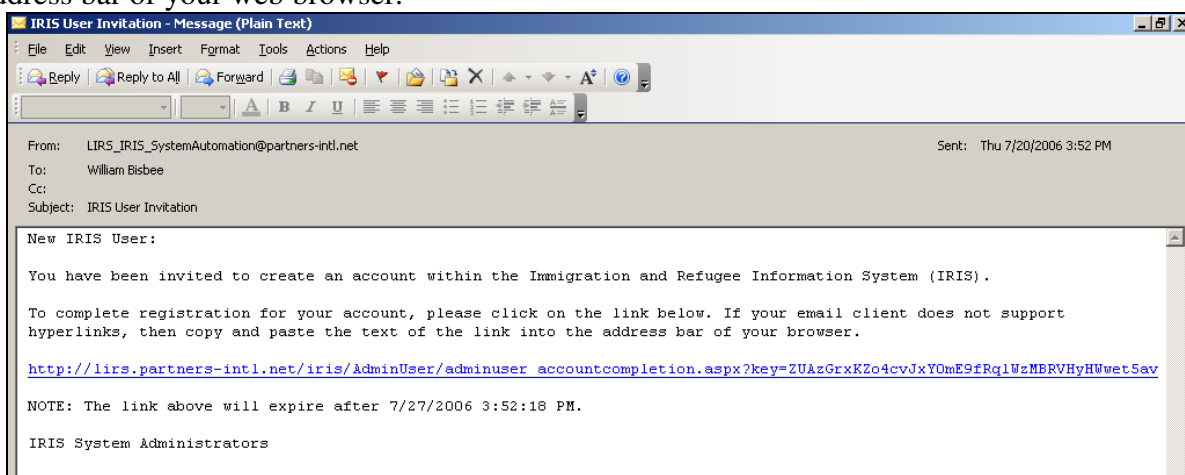
Each process will be detailed in the appropriate section within the manual.

## Basics

If your IRIS account has already been established, you can skip down to the section titled “Logging On”

## Setting Up Your IRIS Account

Once an IRIS administrator enters your name and security level into the system, you will receive an email message inviting you to create your IRIS account. The message should look similar to the one below. Click on the [link](#) within the email, or copy the address and paste it into the address bar of your web browser.



Once you are at the User Account Completion screen, complete the fields requested, noting your Username and Password for future use.

The screenshot shows a web browser window with the address bar containing the URL: [http://lirs.partners-intl.net/iris/AdminUser/adminuser\\_accountcompletion.aspx?key=ZUAzGrxKZo4cvJxY0mE9fRqIWzMBRVHyHWwet5av](http://lirs.partners-intl.net/iris/AdminUser/adminuser_accountcompletion.aspx?key=ZUAzGrxKZo4cvJxY0mE9fRqIWzMBRVHyHWwet5av). The page header features the IRIS logo and the text "IMMIGRATION & REFUGEE INFORMATION SYSTEM". The main heading is "User Account Completion". The form contains the following fields: Username: \* (text input with "bbisbee"), Password: \* (password input with "••••••"), Verify Password: \* (password input with "••••••"), First Name: \* (text input with "Bill"), Last Name: \* (text input with "Bisbee"), Phone Number: \* (text input with "410-230-2896"), Phone Number 2: (empty text input), and Title: (text input with "System Admin"). A "Submit" button is located at the bottom left of the form.

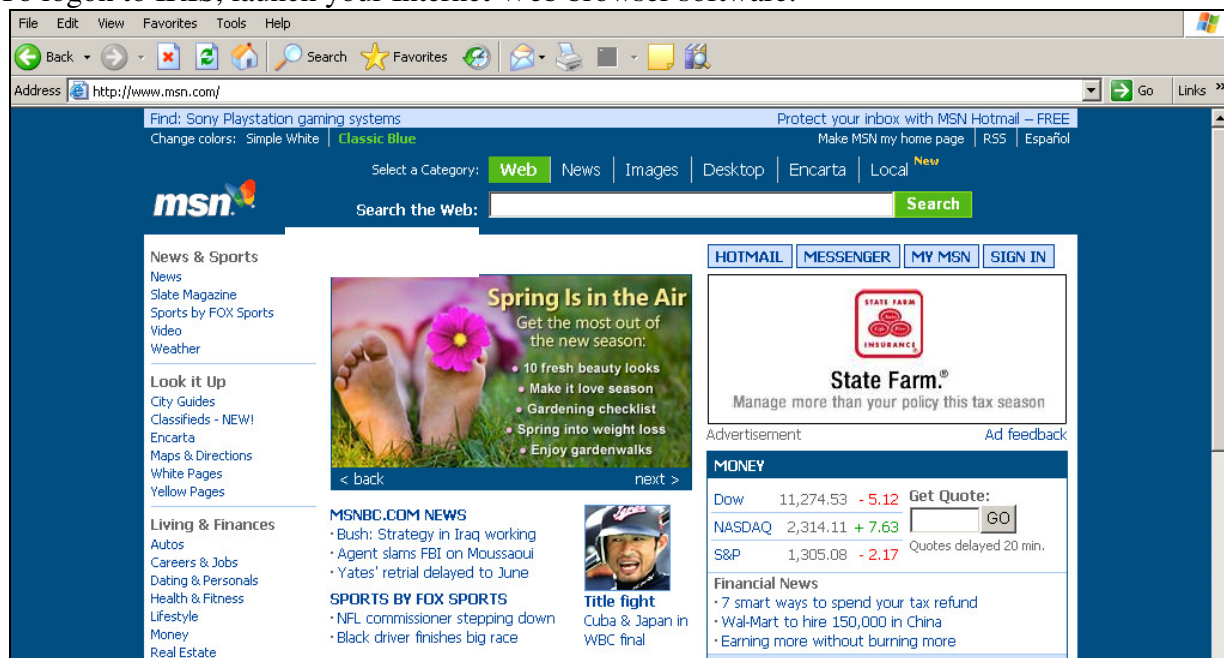
## Logging On

IRIS is a web-based application allowing authorized users access from different locations.

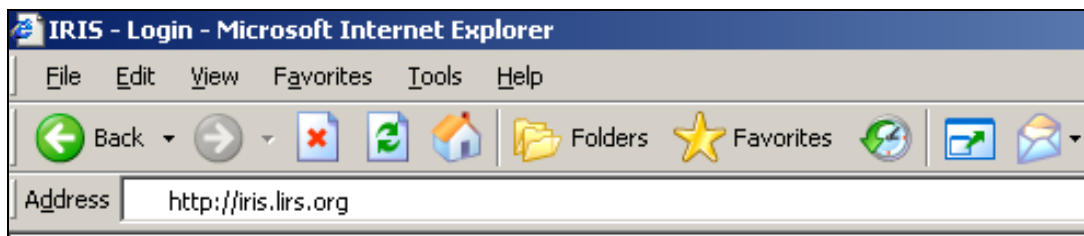
### The Process

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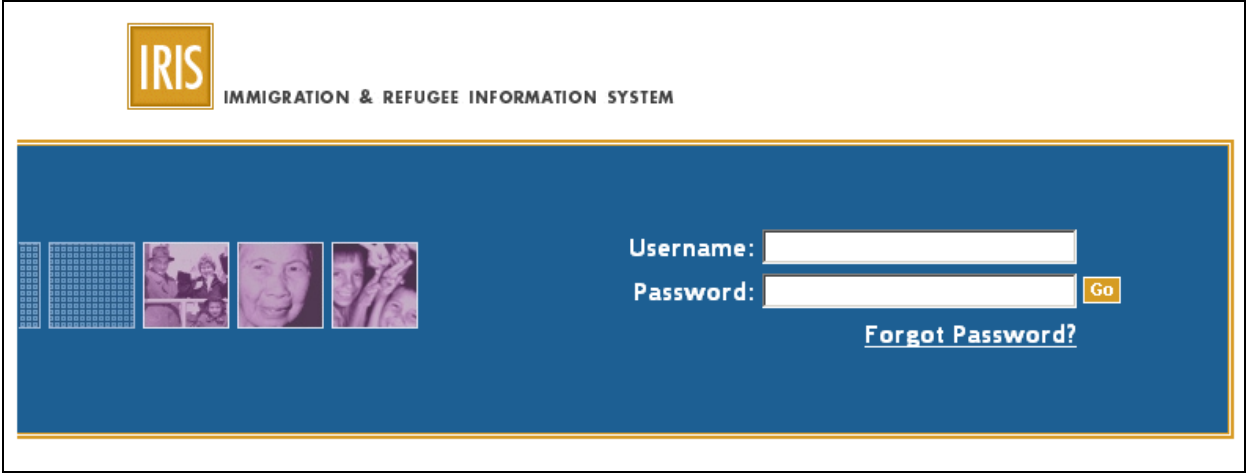
To logon to IRIS, launch your Internet Web browser software.



Now that the browser is opened, and depending on your computer's configuration, select the IRIS link from your Favorites (or bookmark) or enter the web address in the address bar:



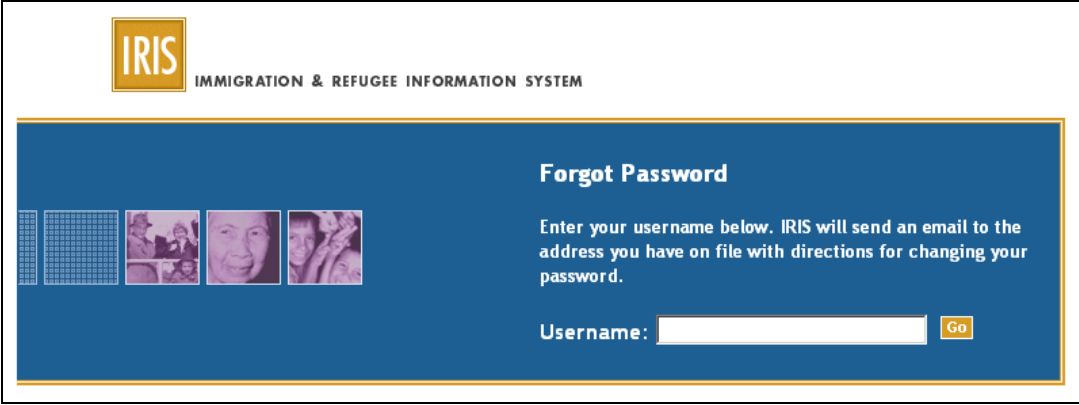
The Login page appears.



Enter your IRIS Username and Password, then click the **Go** button, or press the [Enter] key.

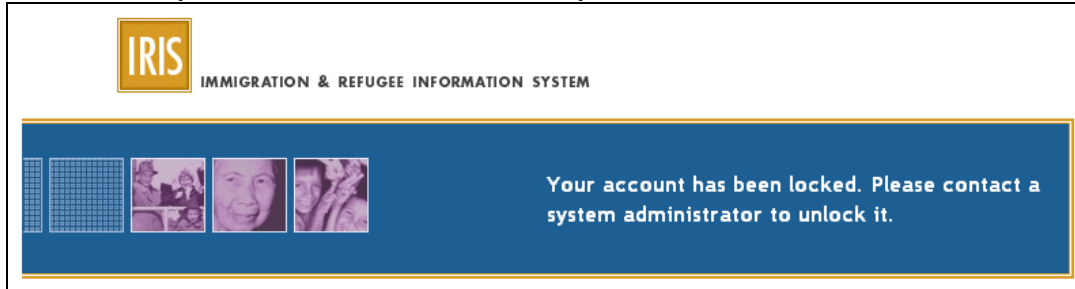
## Forgotten Password

If you do not have, or cannot remember, your password, click on the **Forgot Password** link, where you will be prompted to enter your Username – a temporary password will then be automatically sent to the e-mail address associated with your IRIS login.



## Locked Account

If an incorrect password is entered three times, the user account will be locked. If this occurs, call your Affiliate System Administrator to unlock your account.




If your login was successful, the IRIS Dashboard will be displayed.

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## End of Process

### How to Log On to IRIS

1. From the desktop, double-click the IRIS icon  
**OR**  
Launch your internet browser  
**AND**  
Select Favorites>IRIS
2. Enter your username in the Username field.
3. Enter your password in the Password field.
4. Click .

## The IRIS Dashboard

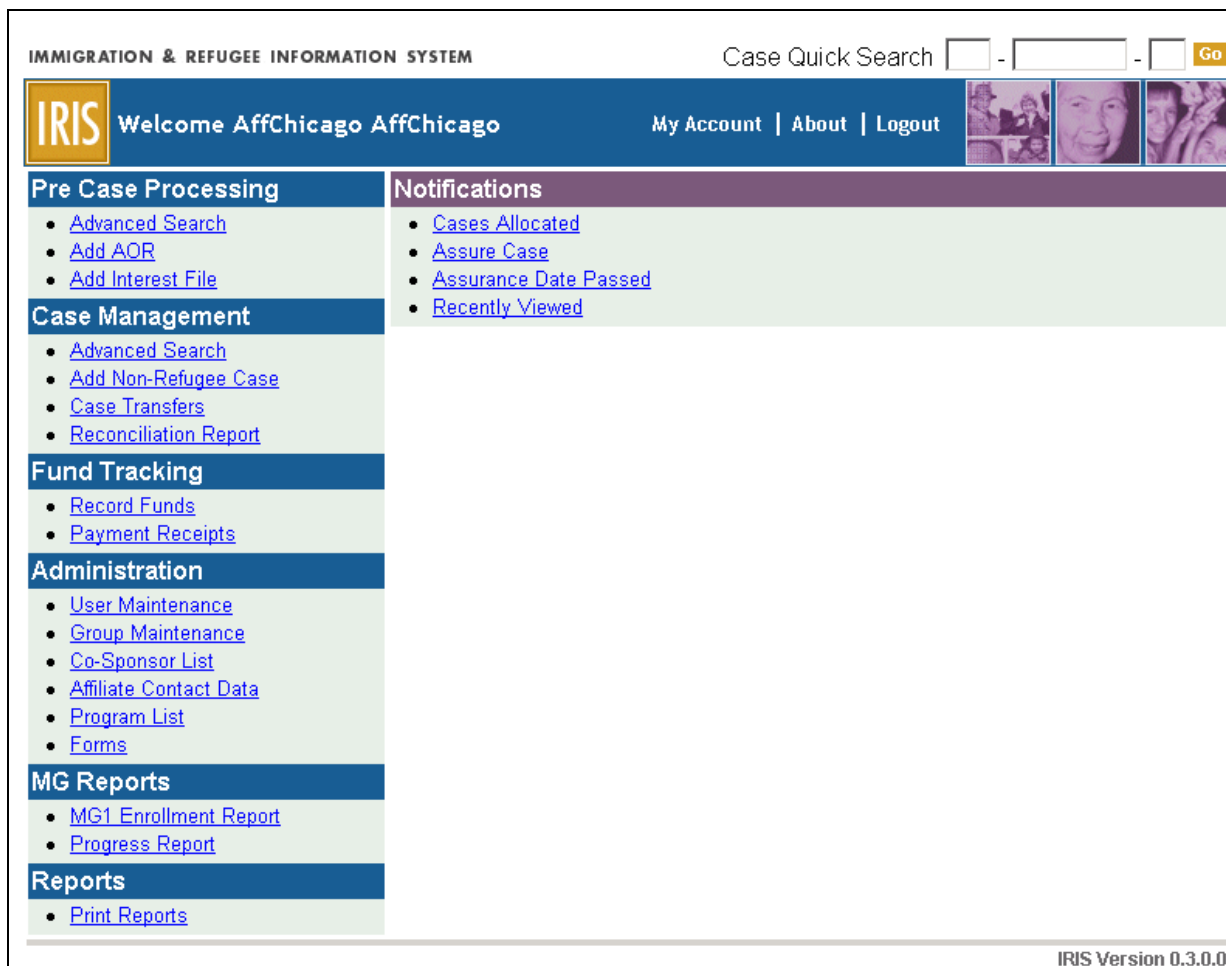
The Home Page of IRIS is called the Dashboard. From here, users can receive notifications on pending items and access all of IRIS's functions.

The screenshot shows the IRIS Dashboard interface. At the top, it says "IMMIGRATION & REFUGEE INFORMATION SYSTEM" and "Case Quick Search" with input fields and a "Go" button. Below this is a blue header bar with the "IRIS" logo, the text "Welcome AffChicago AffChicago", and links for "My Account | About | Logout". To the right of the header are three small profile pictures. A bracket labeled "1" encompasses the top search and header area. On the left side, there is a vertical navigation menu with several sections: "Pre Case Processing", "Case Management", "Fund Tracking", "Administration", "MG Reports", and "Reports". Each section contains a list of links. A bracket labeled "2" encompasses this entire navigation menu. On the right side, there is a "Notifications" pane with a list of items: "Cases Allocated", "Assure Case", "Assurance Date Passed", and "Recently Viewed". A bracket labeled "3" encompasses this notifications pane.

The Dashboard is composed of three main sections:

1. The Header Bar
2. The Navigation Bar
3. The Notifications Pane

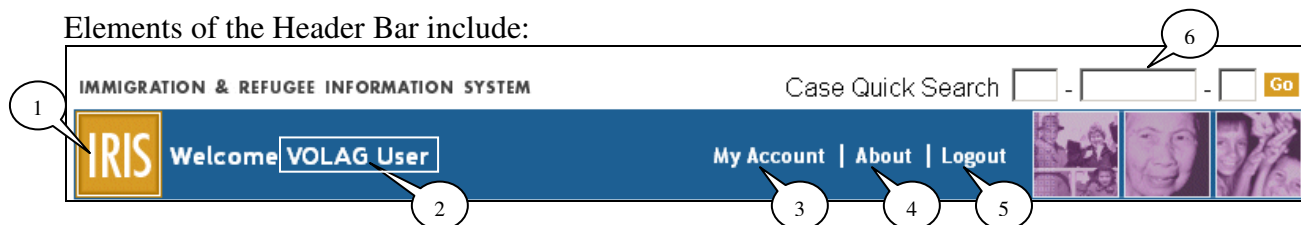
# IRIS Users' Guide



## The Header Bar

The Header Bar is contained at the top of every IRIS screen, not just the Dashboard. The Header Bar allows users to perform common tasks and get basic information about the IRIS session.

Elements of the Header Bar include:



1. **IRIS Icon** link – shortcut back to the IRIS Dashboard Page.
2. **User Name** – identifies name of user currently logged into IRIS.

3. **My Account** link – allows user to update information or change password.

**My Account**

**Username:** VOLAGuser

**First Name:** VOLAG

**Last Name:** User

**Email Address:**

**Phone Number: \***

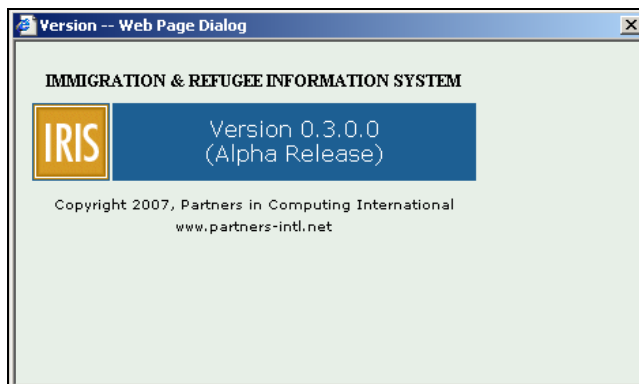
**Phone Number 2:**

Change my password

**Current Password: \***

Fields marked by an asterisk (\*) are required.

4. **About** link – displays application name and version number.



5. **Logout** link – allows user to log out of the IRIS system. Once logged out, the system will display the login screen again.
6. **Case Quick Search** – from any screen, a user can enter a case number, press [Enter] or click on the **Go** button, and be taken to that case.

Case Quick Search  -  -

## The Navigation Bar

<b>Pre Case Processing</b>
<ul style="list-style-type: none"><li>• <a href="#">Advanced Search</a></li><li>• <a href="#">Add AOR</a></li><li>• <a href="#">Add Interest File</a></li></ul>
<b>Case Management</b>
<ul style="list-style-type: none"><li>• <a href="#">Advanced Search</a></li><li>• <a href="#">Add Non-Refugee Case</a></li><li>• <a href="#">Case Transfers</a></li><li>• <a href="#">Reconciliation Report</a></li></ul>
<b>Fund Tracking</b>
<ul style="list-style-type: none"><li>• <a href="#">Record Funds</a></li><li>• <a href="#">Payment Receipts</a></li></ul>
<b>Administration</b>
<ul style="list-style-type: none"><li>• <a href="#">User Maintenance</a></li><li>• <a href="#">Group Maintenance</a></li><li>• <a href="#">Co-Sponsor List</a></li><li>• <a href="#">Affiliate Contact Data</a></li><li>• <a href="#">Program List</a></li><li>• <a href="#">Forms</a></li></ul>
<b>MG Reports</b>
<ul style="list-style-type: none"><li>• <a href="#">MG1 Enrollment Report</a></li><li>• <a href="#">Progress Report</a></li></ul>
<b>Reports</b>
<ul style="list-style-type: none"><li>• <a href="#">Print Reports</a></li></ul>

The Navigation Bar contains links to all of the functions assigned to you by the System Administrator.

Note: Your Navigation Bar may contain fewer links, or may contain additional ones, from those shown here.

## The Notifications Pane

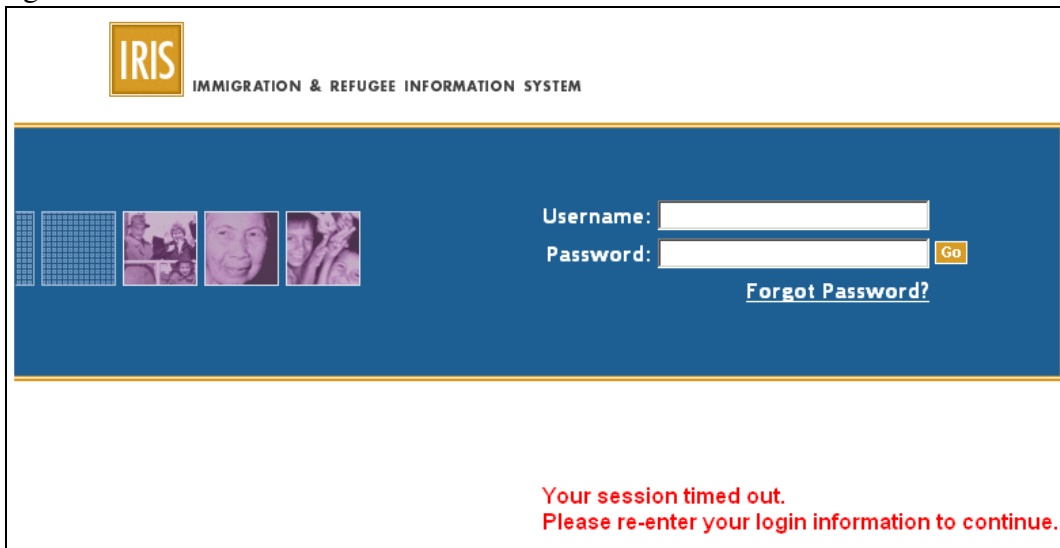
<b>Notifications</b>
<ul style="list-style-type: none"><li>• <a href="#">Assure Case</a></li><li>• <a href="#">Assurance Date Passed</a></li><li>• <a href="#">Recently Viewed</a></li></ul>

The Notifications Pane shows alerts for new assignments that have been made as well as upcoming or overdue task dates. In the example at left, the first notification informs you that there is a case that has been assigned to you for assurance. The second notification lets you know that there is an assurance that is overdue. See **Appendix A** for a complete list of IRIS notifications.

The Notifications Pane also allows you to quickly navigate to areas that you have recently used. By clicking on the Recently Viewed link, the most recent ten AORs, Interests or Cases are displayed, along with a link for each to take you directly there.

## ***Session Time-Out***

For security reasons, IRIS is designed to “time-out” after 10 minutes of inactivity. This prevents unauthorized users from gaining access to the system of someone who has walked away from his/her computer. If you click on a link in IRIS after the time-out period, you may see the following screen:



The screenshot shows the IRIS (Immigration & Refugee Information System) login interface. At the top left is the IRIS logo and the text "IMMIGRATION & REFUGEE INFORMATION SYSTEM". Below this is a blue header area containing a grid of small images on the left and a login form on the right. The login form includes fields for "Username:" and "Password:", a "Go" button, and a link for "Forgot Password?". Below the header, a red message reads: "Your session timed out. Please re-enter your login information to continue."

Just re-enter your login information and click the GO button – you should be returned to the screen you were on prior to this one, ready to continue using the system.

## ***Permission Levels***

Permissions determine what sections of IRIS a particular user will see on the screen or what data a user will have access to edit. For assigning permissions, users are divided into two types: VOLAG and Affiliate. Based on the type, a user can be given access to different pre-defined functions. IRIS also has the capability for a system administrator to define custom user roles.

In most cases, if you are not assigned to a specific section of the program, you will not see any links associated with that section. There are some exceptions to this, where you can see and click on a link, but are then given a message indicating that you do not have the authorization to view the data. An example of this type of exception is the Health tab in a case member's file.

In general, the VOLAG is responsible for setting up and maintaining VOLAG-type users and Affiliate Supervisors, and the Affiliate Supervisor is responsible for setting up and maintaining Affiliate users.

## IRIS Users' Guide

Below are the basic permission levels that have been configured for IRIS, along with a basic description of what type of role a person with that permission would have:

Type	Permission Group	Description
VOLAG	IRIS System Administrator	Maintains all IRIS global system settings
VOLAG	Case Processing Staff	Performs pre-case and case processing and reporting functions for the VOLAG. Generally, has read-only permission to Affiliate-entered data.
VOLAG	Case Processing Staff with Health Permissions	Same as Case Processing Staff, but with specific access to case member health data, including BioData.
Affiliate	Affiliate Supervisor	Supervisor at each affiliate agency or site office.
Affiliate	Case Worker	Works on all affiliate case management processes for R&P Program.
	Case Worker with Health Permissions	Same as Case Worker, but with specific access to case member health data, including medically sensitive case notes and the ability to print BioData
Affiliate	Case Worker: MG	Works on affiliate case management processes for Matching Grant Program.

Note: users can be assigned to more than one permission group, for instance Case Worker and Case Worker: MG.