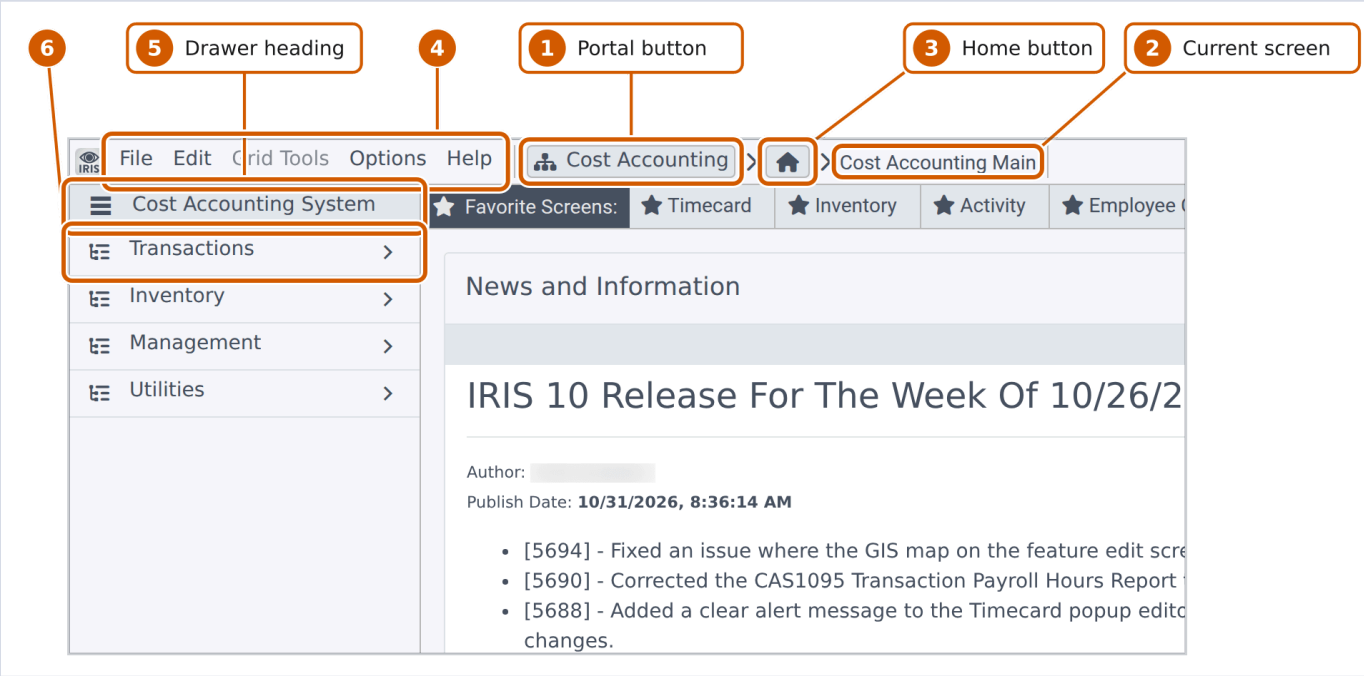
Navigating portals and pages

Overview

IRIS10 has several portals, such as Cost Accounting. Each portal has a dashboard and a set of screens. This page describes the main areas of a portal screen: the portal button, the current screen label, the home button, the menu bar and the drawer. It also shows how to switch portals, open a screen from the drawer, reopen a screen from **Favorite Screens**, return to the portal dashboard and collapse the drawer.



The Cost Accounting dashboard: header controls along the top and the drawer on the left.

1. Portal button
2. Current screen
3. Home button
4. Menu bar
5. Drawer heading
6. Drawer categories (Transactions, Inventory, Management, Utilities)

Before you begin

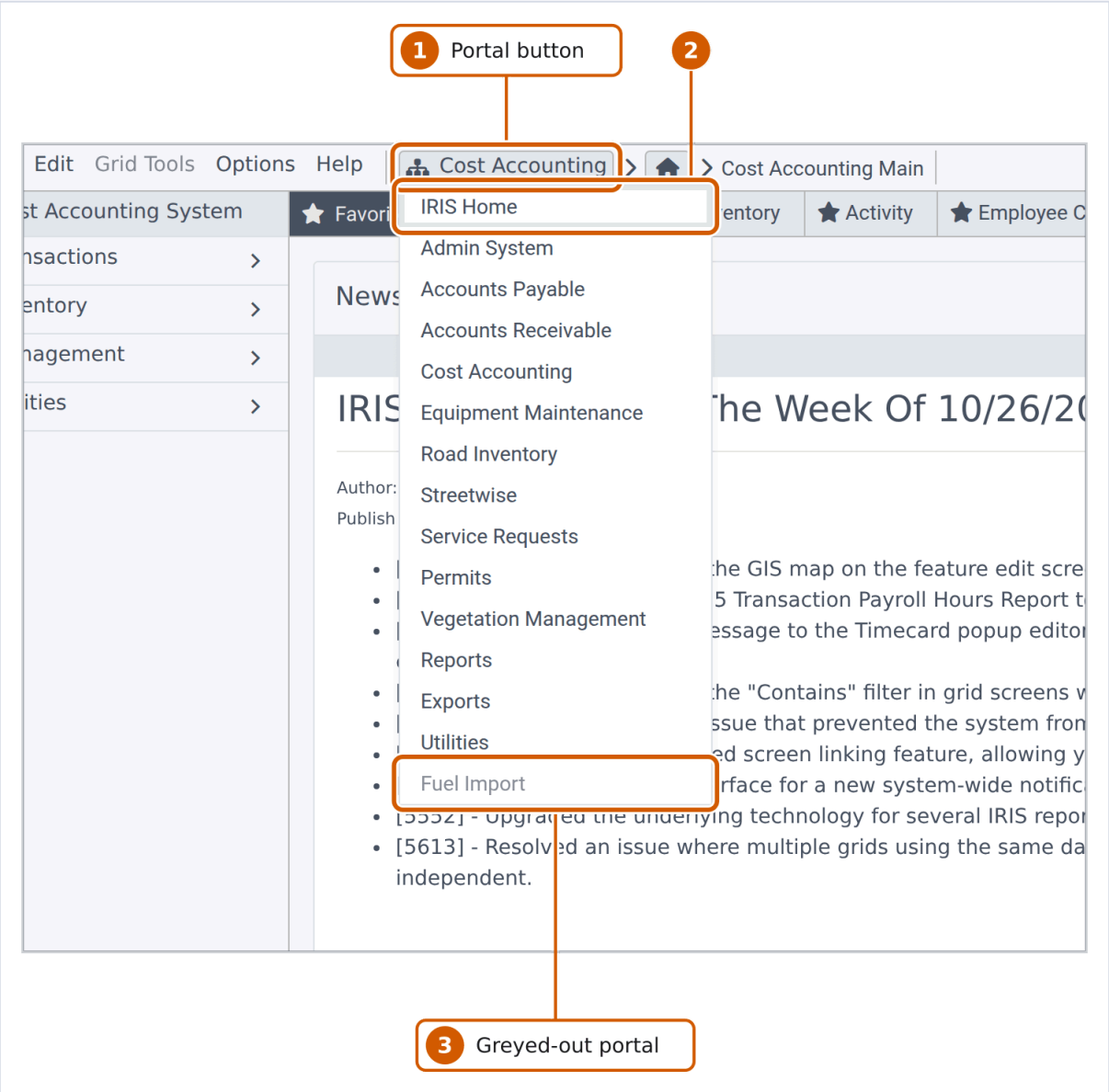
- You are signed in to IRIS10 (see Logging in).
- You know which portal you intend to use (for example, **Cost Accounting** or **Road Inventory**).

Procedure

Switch to another portal

1. In the header, click the portal button. It shows the name of the current portal (for example **Cost Accounting**), and its tooltip reads "Click to select a portal." A list of portals opens, starting with **IRIS Home** and ending with **Fuel Import**.

> **Note:** You cannot select portals that are greyed out because your account does not have access to them.



The portal list. Greyed-out portals are not available to your account.

1. Portal button
2. IRIS Home

3. Greyed-out portal

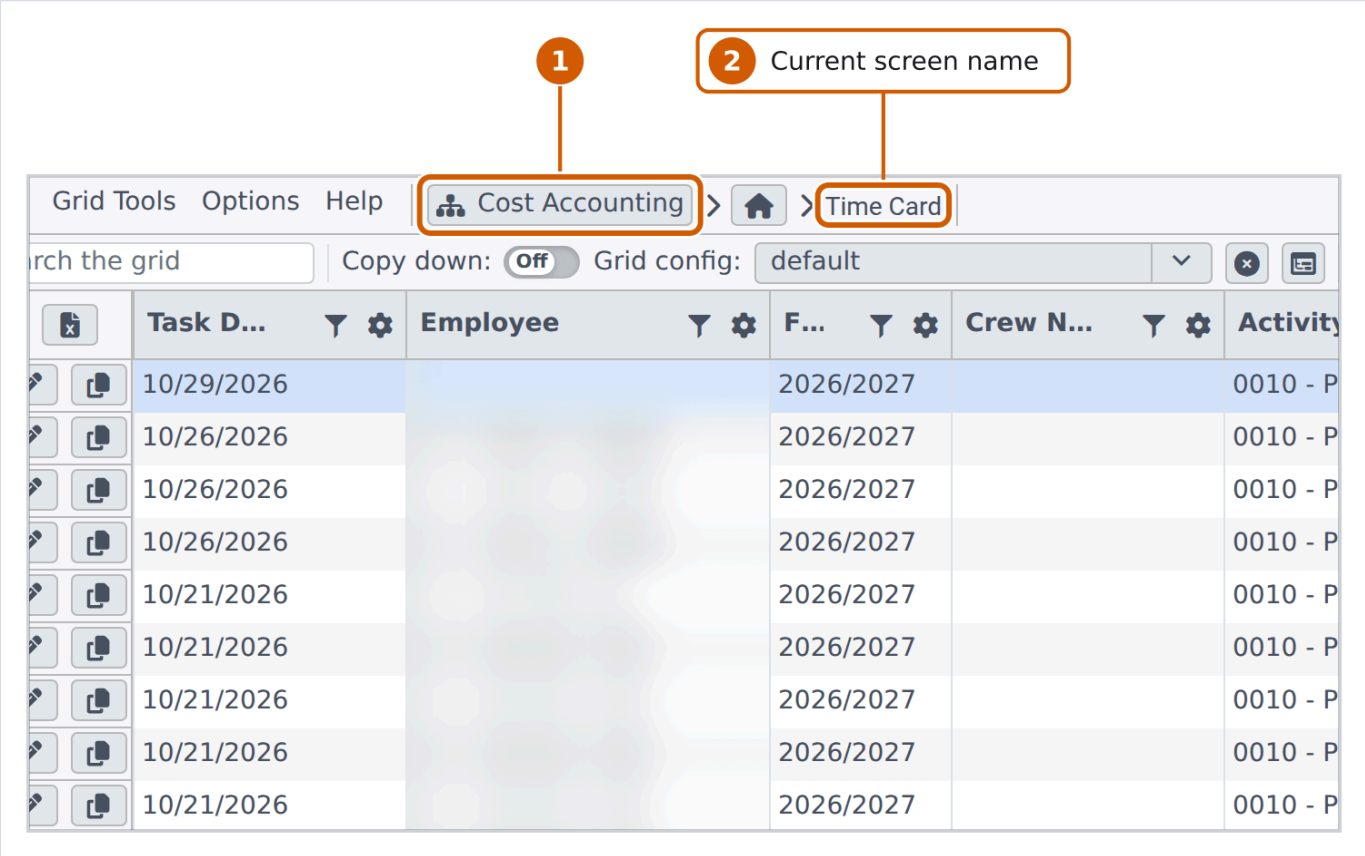
2. Click the name of the portal you want, for example **Road Inventory**. The portal opens in a new browser tab. The original portal stays open in its own tab.

> **Note:** If a portal you need is greyed out, ask your IRIS10 administrator for access.

3. In the new tab, check the portal button in the header. The portal button shows the name of the portal you opened.

Open a screen from the drawer

1. In the drawer on the left, find the category that contains the screen you want: **Transactions**, **Inventory**, **Management** or **Utilities** (Cost Accounting portal shown).
2. Click the screen you want, for example **Time Card**. The screen opens, and the label next to the portal button shows the screen name, for example **Time Card**.



With a screen open, the header shows the screen name. The portal button still shows the portal.

1. Current portal
2. Current screen name

Open a screen from Favorite Screens

1. IRIS will automatically designate the most commonly visited screens as **Favorite Screens**.

2. Click the home button in the header (tooltip "Click to return to portal dashboard"). The portal dashboard opens. The screen label reads the portal name followed by **Main**, for example **Cost Accounting Main**.
3. Under **Favorite Screens**, click the title of the screen you want. Each one shows a star icon next to its title. The screen opens, and the header shows its name.

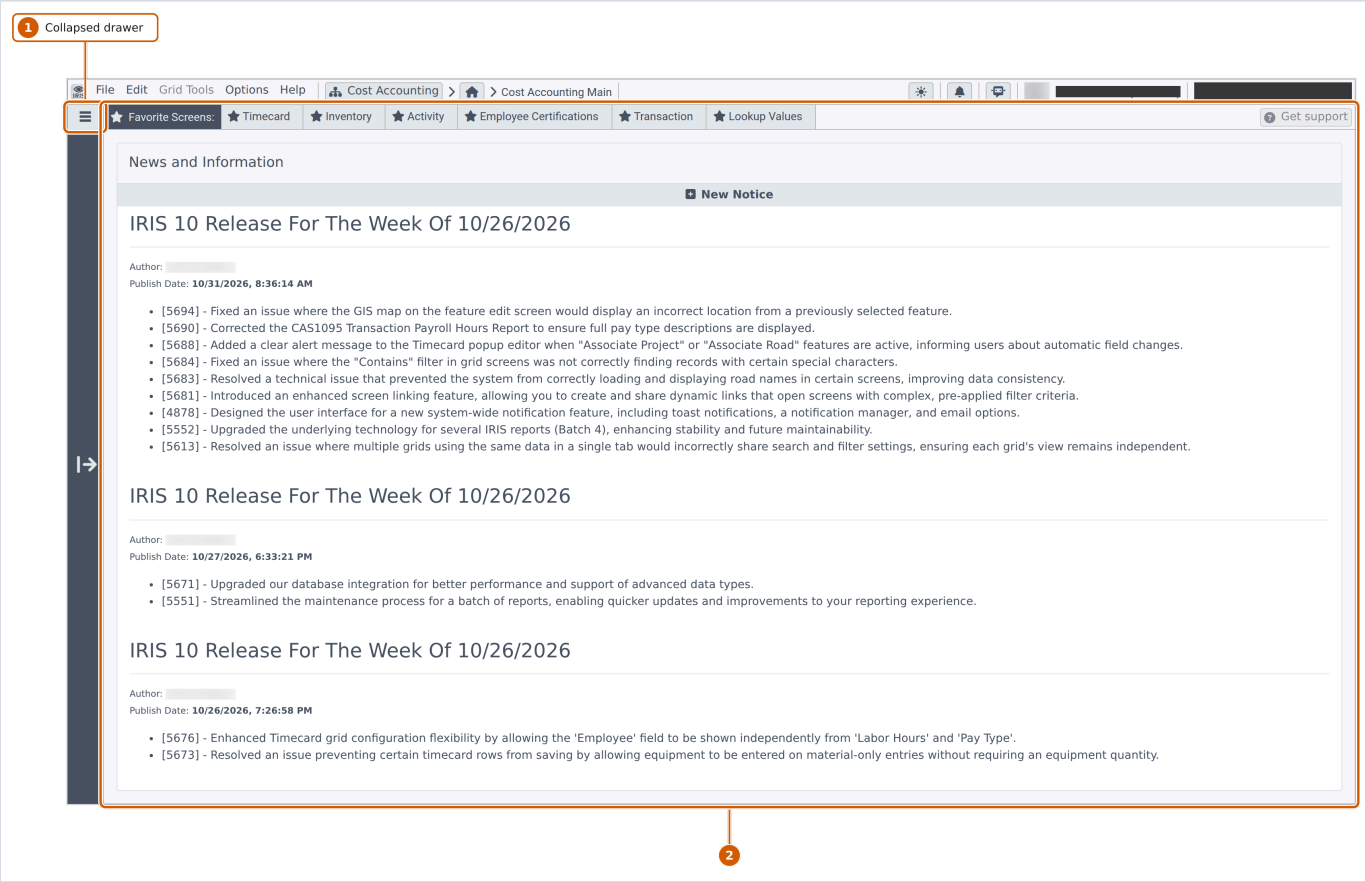
Return to the portal dashboard

1. From any screen, click the home button in the header (tooltip "Click to return to portal dashboard"). The portal dashboard opens, and the screen label reads the portal's **Main** page, for example **Cost Accounting Main**.

> **Note:** If you open a portal's dashboard that you do not have access to, IRIS10 sends you to **IRIS Home**.

Collapse the drawer

1. At the top of the drawer, click the portal heading (for example **Cost Accounting System**). The drawer collapses to a compact bar. The compact bar hides the categories and shows the portal heading.



The drawer collapsed to a compact bar, leaving more room for the dashboard.

1. Collapsed drawer

2. Dashboard content, including Favorite Screens

Reference

Parts of the portal screen

ELEMENT	WHAT YOU SEE	WHAT IT DOES
Portal button	The current portal name, for example **Cost Accounting**. Tooltip: "Click to select a portal."	Opens the list of portals.
Current screen label	The name of the open screen, for example **Cost Accounting Main** on the dashboard or **Time Card** on a screen.	Shows where you are.
Home button	Tooltip: "Click to return to portal dashboard."	Returns to the current portal's dashboard.
Menu bar	**File**, **Edit**, **Grid**, **Tools**, **Options**, **Help**	Menus for working with the open screen.
Drawer heading	The portal heading, for example **Cost Accounting System**.	Collapses the drawer.
Drawer categories	For Cost Accounting: **Transactions**, **Inventory**, **Management**, **Utilities**	Group the portal's screens.

Portal list

The list shows the portals in this order.

PORTAL (AS SHOWN IN THE LIST)	NOTES
IRIS Home	Always available.
Admin System	
Accounts Payable	Greyed out if you do not have access.
Accounts Receivable	Greyed out if you do not have access.
Cost Accounting	Greyed out if you do not have access.
Equipment Maintenance	Greyed out if you do not have access.
Road Inventory	Greyed out if you do not have access.
Streetwise	Greyed out if you do not have access.
Service Requests	Greyed out if you do not have access.
Permits	Greyed out if you do not have access.
Vegetation Management	Greyed out if you do not have access.
Reports	Greyed out if you do not have access.
Exports	Greyed out if you do not have access.

PORTAL (AS SHOWN IN THE LIST)	NOTES
Utilities	Not restricted by portal access.
Fuel Import	Available only to some agencies; greyed out for all others. Greyed out if you do not have access.

Tips and notes

Note: Choosing a portal from the portal list opens it in a new browser tab, so you can keep working in more than one portal at the same time.

Tip: Favorite Screens fills itself. IRIS10 lists the screens you visit most often in the current portal, most visited first, and shows up to six.

Note: If you have not visited any screens yet, the dashboard shows "No favorite screens yet. As you visit screens, they will appear here."

Note: Screens you can no longer access do not appear in **Favorite Screens**.

Important: A greyed-out portal means your account does not have access to it. Ask your IRIS10 administrator if you need it.

Note: For administrators: unless you give a user a specific access level for a portal, their access to that portal follows their general access level. With default settings, an active user can see every portal.

Note: The same portal can appear under slightly different names. For example, the portal button shows **Cost Accounting**, the drawer heading shows **Cost Accounting System** and the dashboard label shows **Cost Accounting Main**.

Related topics

- Logging in
- Data grid overview and basics