Units of measure, fiscal years and organizations

Overview

The UOM, Fiscal and Organization screens hold reference data that other parts of IRIS10 use. You use them to maintain units of measure, look up fiscal years and maintain organization records.

MENU CATEGORY	MENU ITEM	SCREEN HEADER
Lookup Values Screens	Units Of Measure	UOM
System Setup	Fiscal Year	Fiscal
System Setup	Organization	Organization

For the Lookup Values Screens menu category, see Lookup values. To reach the menu categories, see Navigating portals and pages.

In this topic you learn how to:

- Add and maintain the units of measure your department uses, with English and metric names.
- Look up fiscal years and their begin and end dates.
- Add and maintain your organization records, including contact details.
- Understand what the default organization is, and that only one organization can be the default.
- Choose a different organization for your current session.

This topic is for administrators, inventory and asset managers, and supervisors.

Before you begin

- Sign in to IRIS10. See Logging in.
- Make sure you have access to the Utilities screens. Access is granted through Security Administration. See Security Administration: screens, reports, copying and resetting.
- Be familiar with the shared IRIS10 data grid, including adding, editing and saving rows. See Grid viewing and editing.

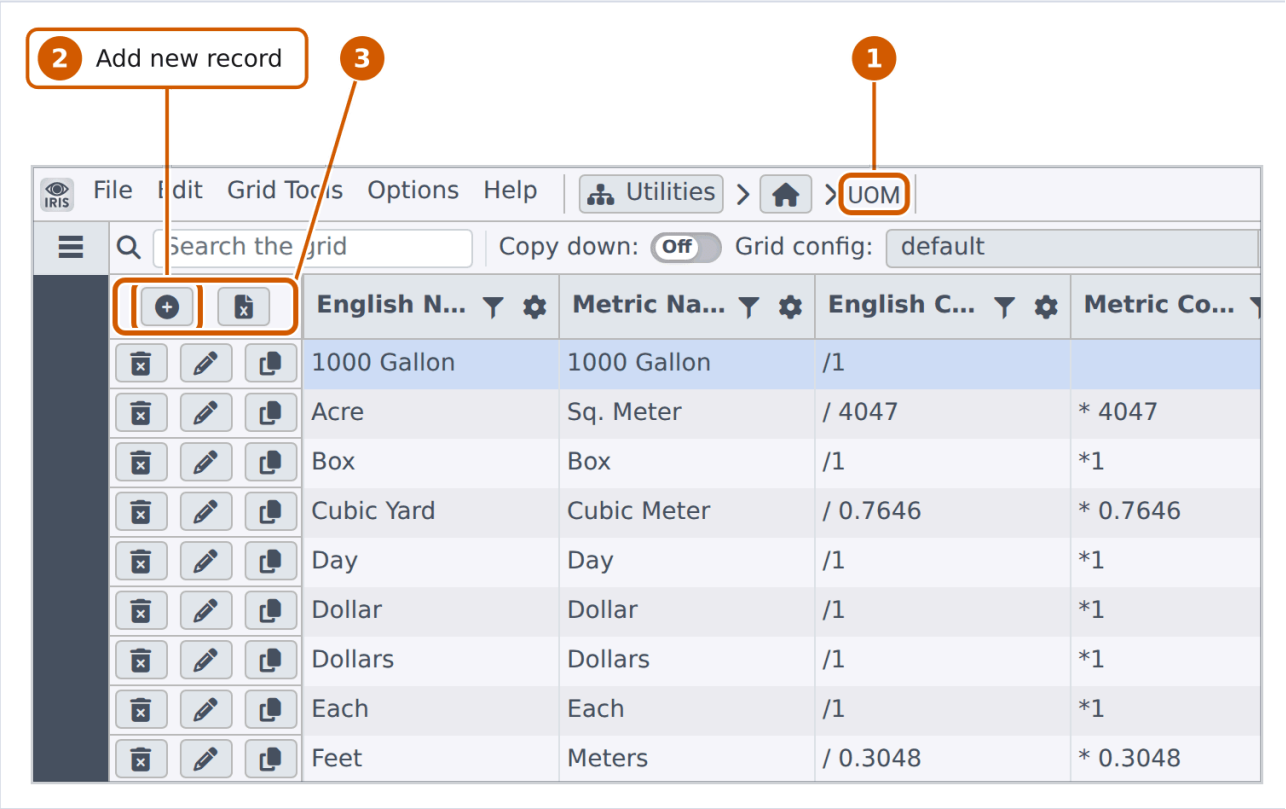
Procedure

Add a unit of measure

1. Open the main menu and, under **Lookup Values Screens**, select **Units Of Measure**. The screen header reads **UOM**. The grid lists units of measure sorted by **English Name** from A

to Z.

> **Note:** Units of measure are covered by the Utilities security area. If you cannot see the menu item or the add button, ask your administrator about your access.



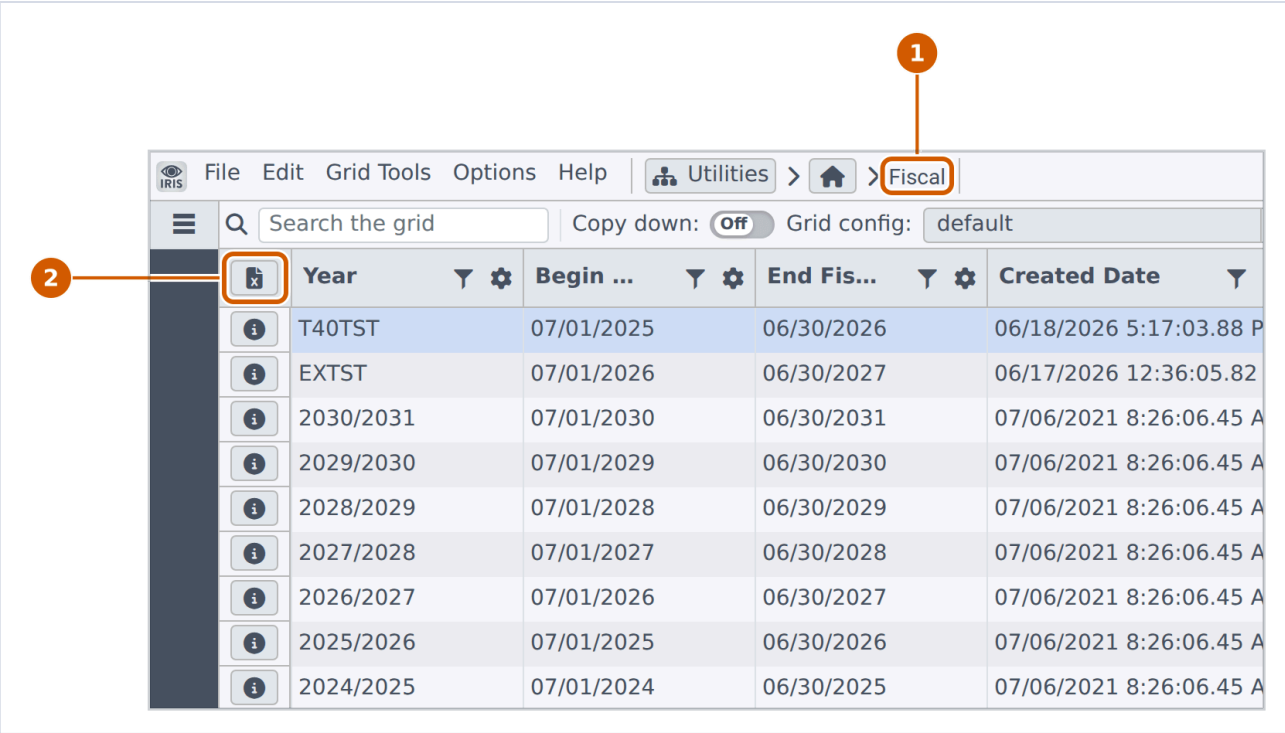
The UOM screen lists units of measure by English Name. Use Add new record to create a new unit.

1. Screen header: UOM
2. Add new record
3. Grid columns

2. Click the add button (tooltip: "Add new record. (ctrl+shift+a)"). An editor titled **UOM** opens with the **UOM Info** section.
3. In **English Name**, type the English name of the unit. You can enter up to 20 characters. If you leave the field empty, IRIS10 shows a message that the field is required.
4. In **Metric Name**, type the metric name of the unit. You can enter up to 20 characters. **Metric Name** is required.
5. If needed, fill in **English Conversion Factor** and **Metric Conversion Factor**. Each is optional and allows up to 50 characters.
6. Click **Save**. The new unit of measure is kept. IRIS10 keeps a new record only after you click **Save**.

Look up a fiscal year

1. Open the main menu and, under **System Setup**, select **Fiscal Year**. The screen header reads **Fiscal**. The grid lists fiscal years sorted by **Year** with the most recent first.



The Fiscal screen lists fiscal years with the most recent first, along with their begin and end dates.

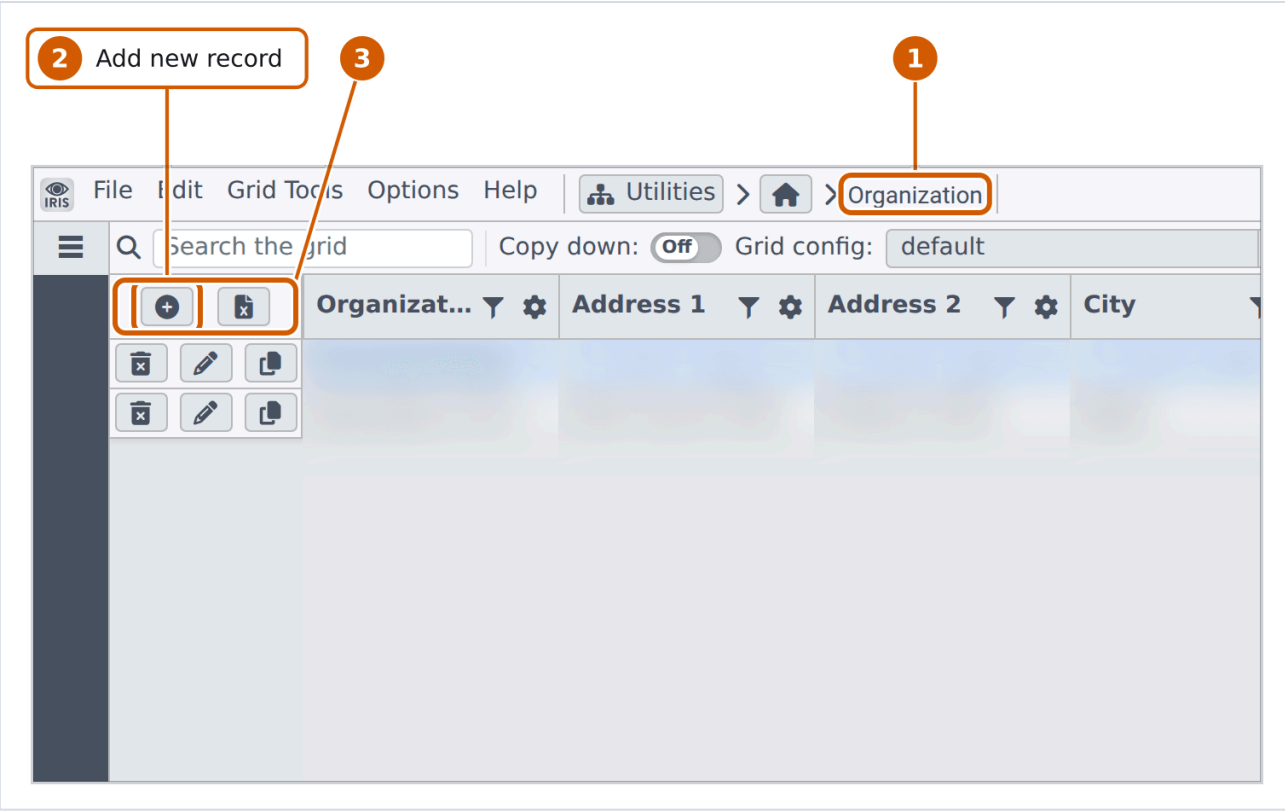
1. Screen header: Fiscal
2. Year, Begin Fiscal and End Fiscal columns

2. Find the fiscal year you need and read its **Begin Fiscal** and **End Fiscal** dates. Dates are shown in `MM/dd/yyyy` format.
3. Click the info button on the row. A window opens with the details of the fiscal year you selected.

Add an organization

1. Open the main menu and, under **System Setup**, select **Organization**. The screen header reads **Organization**. The grid lists organizations sorted by **Organization Name** from Z to A.

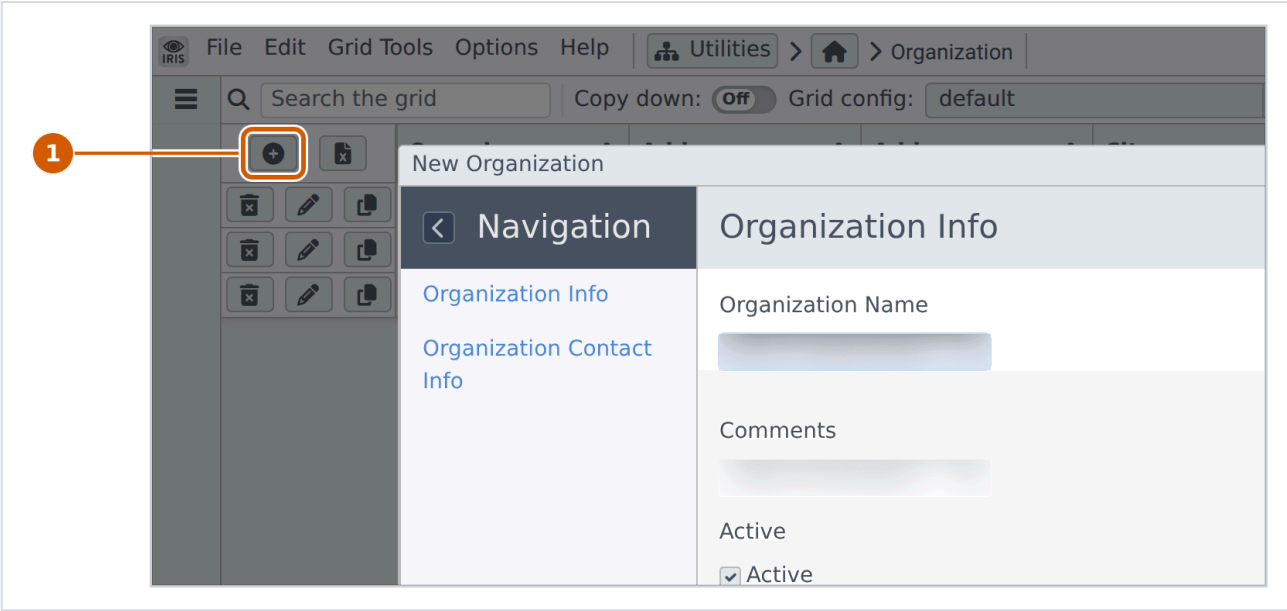
> **Note:** Organizations are covered by the Utilities security area. If you cannot see the menu item or the add button, ask your administrator about your access.



The Organization screen lists your organizations with their contact details, Default Organization and Active columns.

1. Screen header: Organization
2. Add new record
3. Grid columns

2. Click the add button (tooltip: "Add new record. (ctrl+shift+a)"). An editor titled **Organization** opens. Its required section is **Organization Info**.



The Organization editor groups the fields into Organization Info and Organization Contact Info.

1. Opened with Add new record

3. In **Organization Name**, type the organization's name. You can enter up to 50 characters. **Organization Name** is required.
4. In the **Organization Contact Info** section, fill in the contact fields you need: **Address 1**, **Address 2**, **City**, **State**, **Zip Code**, **Phone Number**, **Fax Number**, **E Mail** and **Website**. **State** accepts 2 characters, **City** 30, **Zip Code** 10, **Phone Number** and **Fax Number** 14 each, and **Address 1**, **Address 2**, **E Mail** and **Website** 50 each.
5. In the **Organization Info** section, fill in **UNC Caller ID**, **Comments** and **ARS Invoice Number Prefix** if they apply. **UNC Caller ID** accepts up to 10 characters, **Comments** up to 256 and **ARS Invoice Number Prefix** up to 2.
6. Leave **Active** ticked if the organization is in use. On a new record, **Active** is ticked by default.
7. Tick **Default Organization** only if this organization should be the default and no other organization is the default already. If another organization is already the default, this message appears: `The organization "<name>" is already set as the default. You cannot set another one.` The checkbox is then cleared. If IRIS10 cannot check for an existing default, it also clears the checkbox.
8. Click **Save**. The new organization is kept. IRIS10 keeps a new record only after you click **Save**.

Choose a different organization for your session

1. From the main menu, select **Edit** > **Organization**. The **Choose Organization** window opens.
2. Check which organization you are using now. The window shows "Currently selected organization: " and a list of your organizations sorted by name from A to Z.

> **Note:** The list shows only the organizations in your current county.

3. Select the organization you want to use. You can select only one.
4. Click **Confirm**. The selected organization becomes your session's organization and the window closes. If you click **Confirm** with nothing selected, the window closes.

> **Note:** To close the window without changing anything, click **Cancel** instead of **Confirm**.

Reference

Units Of Measure (UOM) grid columns

COLUMN	REQUIRED	RULES
English Name	Yes	Up to 20 characters. The grid is sorted by this column from A to Z.
Metric Name	Yes	Up to 20 characters.
English Conversion Factor	No	Up to 50 characters.
Metric Conversion Factor	No	Up to 50 characters.
Created Date, Created By, Last Updated Date, Updated By	—	Audit columns shown in the grid.

Fiscal Year grid columns

COLUMN	RULES
Year	Text, up to 9 characters. The grid is sorted by Year with the most recent first.
Begin Fiscal	Date, shown as `MM/dd/yyyy`.
End Fiscal	Date, shown as `MM/dd/yyyy`.
Created Date, Created By, Last Updated Date, Updated By	Audit columns shown in the grid.

Begin Fiscal is the first date of a fiscal year. **End Fiscal** is the last date of a fiscal year.

Organization fields

FIELD	EDITOR SECTION	REQUIRED	RULES
Organization Name	Organization Info	Yes	Up to 50 characters.
Address 1, Address 2	Organization Contact Info	No	Up to 50 characters each.
City	Organization Contact Info	No	Up to 30 characters.

FIELD	EDITOR SECTION	REQUIRED	RULES
State	Organization Contact Info	No	Up to 2 characters.
Zip Code	Organization Contact Info	No	Up to 10 characters.
Phone Number, Fax Number	Organization Contact Info	No	Up to 14 characters each.
E Mail, Website	Organization Contact Info	No	Up to 50 characters each.
UNC Caller ID	Organization Info	No	Up to 10 characters.
Logo	Organization Info	No	Image. View it with the image button. It is not included in Excel exports.
Comments	Organization Info	No	Up to 256 characters.
Default Organization	Organization Info	Yes (checkbox)	Only one organization can be the default. Not ticked by default.
ARS Invoice Number Prefix	Organization Info	No	Up to 2 characters.
Active	Organization Info	Yes (checkbox)	Ticked by default on a new record.
Created Date, Created By, Last Updated Date, Updated By	—	—	Audit columns shown in the grid.

The default organization

Default Organization is a checkbox that marks the single organization IRIS10 uses when none is given. Only one organization can be the default. If you tick **Default Organization** while another organization is already the default, IRIS10 shows: `The organization "<name>" is already set as the default. You cannot set another one.`

SITUATION	HOW THE DEFAULT ORGANIZATION IS USED
Accounts Payable payable entries	Used when no organization is given.
Accounts Receivable invoice approval	Used when no organization is given.
Signing in or switching county	Becomes your session's organization. You can change it with **Edit** > **Organization**.

Tips and notes

> **Important:** Only one organization can be the default. To make a different organization the default, first clear **Default Organization** on the current default and save that change. Then tick it on the new organization. Otherwise IRIS10 shows: `The organization "<name>" is already set as the default. You cannot set another one.`

Note: Even if the editor lets a second default through, the save is refused with the message: `Default organization already exists for this tenant.`

Tip: Picking an organization with **Edit** > **Organization** changes the organization only for your current session. It does not change the **Default Organization** setting on the **Organization** screen.

Note: New records on **Units Of Measure** and **Organization** are kept only after you click **Save**.

Tip: To add a record from the keyboard, press Ctrl+Shift+A. This is the shortcut shown in the add button tooltip.

Related topics

- Grid viewing and editing
- Navigating portals and pages
- Data grid overview and basics
- Lookup values
- Security Administration: screens, reports, copying and resetting
- Logging in