IRIS 10 — Fundamentals

User manual

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Contents

1. Logging in
2. Navigating portals and pages
3. Data grid overview and basics
4. Grid viewing and editing
5. Grid configurations
6. Grid filters

Logging in

Overview

Use this page to:

- Sign in to IRIS10 with your **Username (email)** and **Password**.
- Reset a forgotten password from the sign-in page.
- Understand the sign-in messages and what to do when a sign-in is refused.
- Extend your session when the **Stay Logged In?** window appears.

Before you begin

You need:

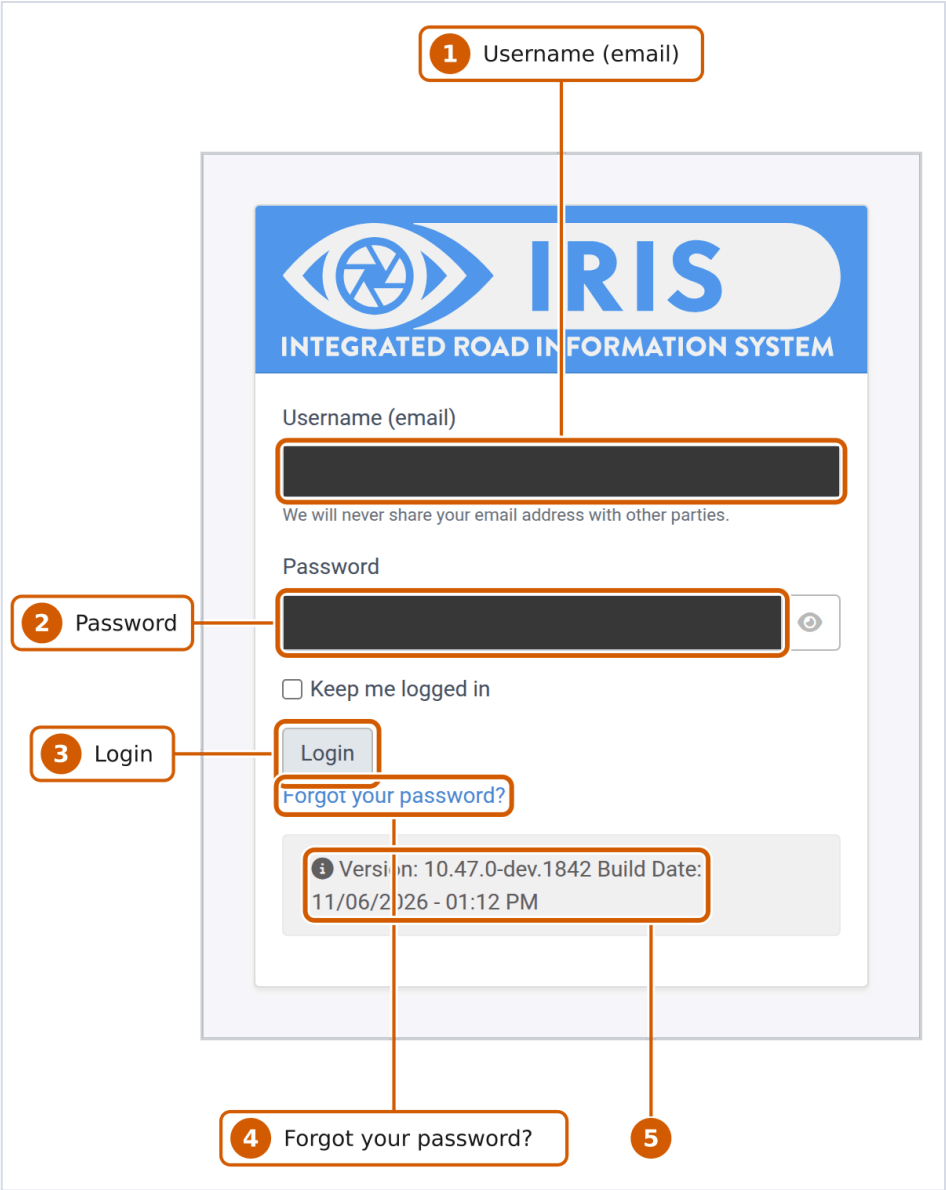
- An IRIS10 user account. Your username is your email address.
- The address of your county's IRIS10 site, open in a web browser.

Procedure

Sign in to IRIS10

1. Open your county's IRIS10 site in your web browser.

   The sign-in page shows the **Username (email)** and **Password** fields, the **Login** button and the **Forgot your password?** link.

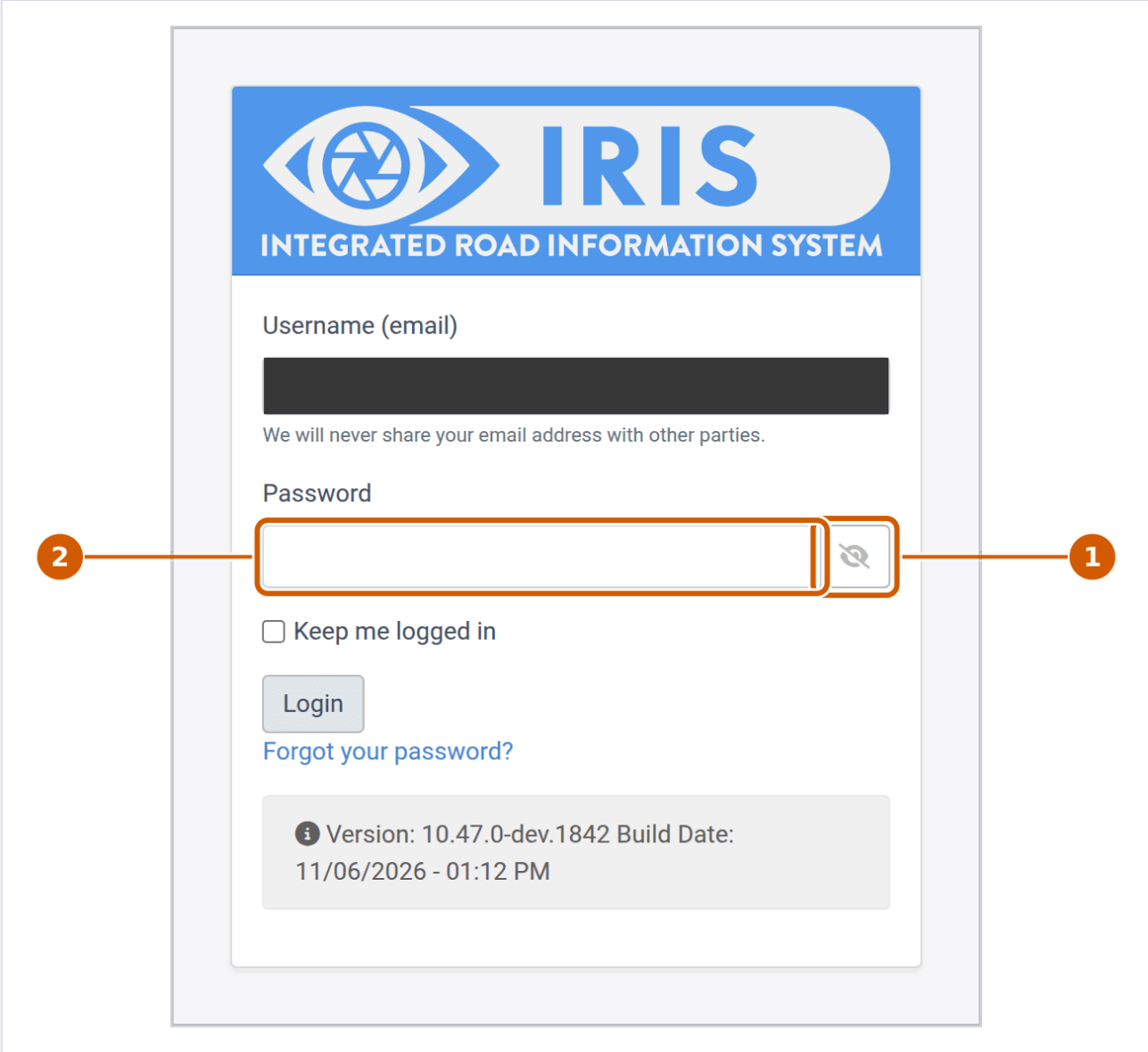


The IRIS10 sign-in page.

1. Username (email)
2. Password
3. Login
4. Forgot your password?
5. Version and build date

2. In **Username (email)**, type the email address your account uses.
3. In **Password**, type your password.
4. Optional: click the password toggle button beside the **Password** field.

   The **Password** field and the toggle button are still shown.



The password toggle button beside the Password field.

1. Password toggle
2. Password

5. Click **Login**.

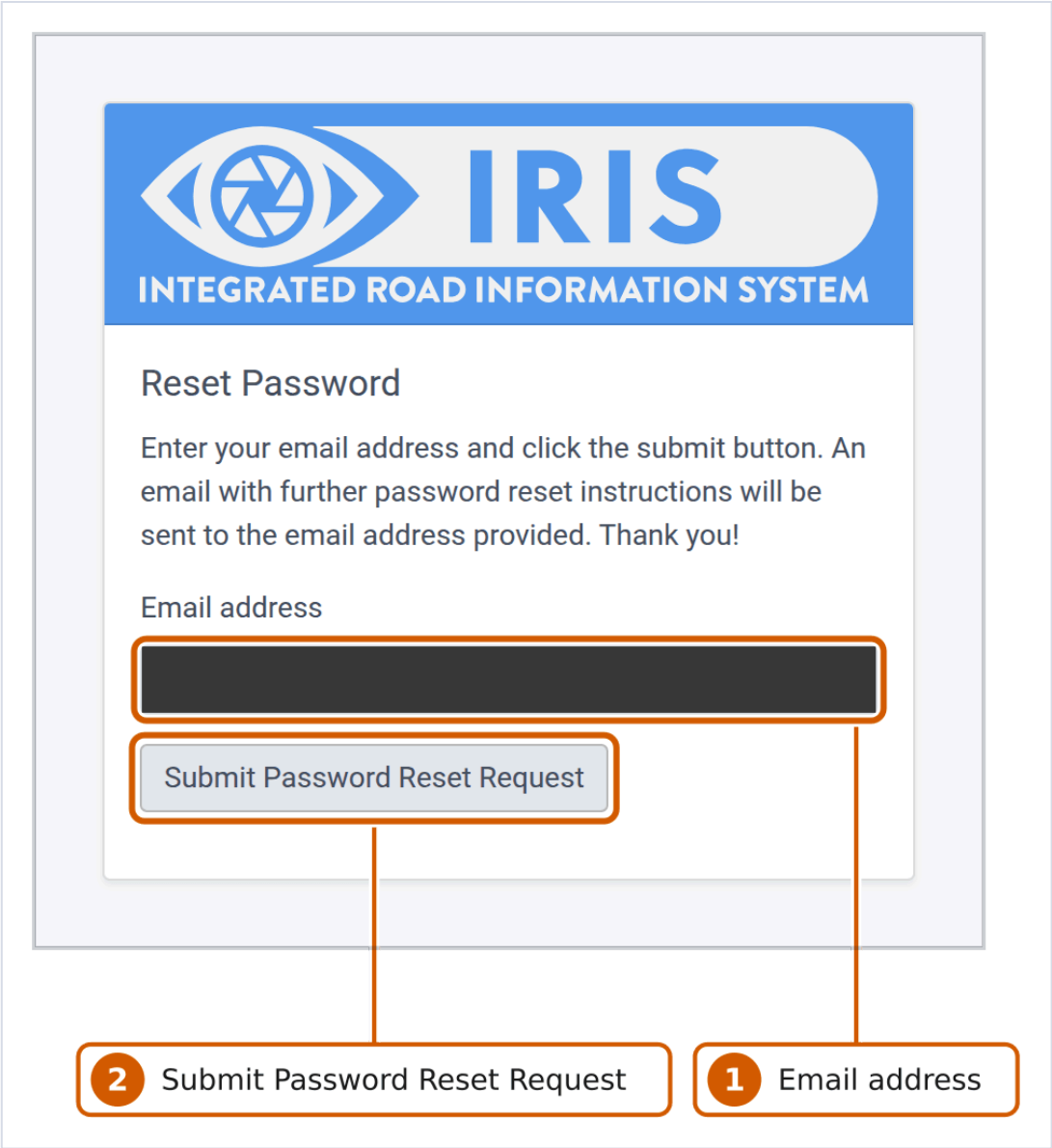
   If the sign-in is refused, a message explains why. See Sign-in messages.

> **Note:** For what you see and how you move around IRIS10 after you sign in, see Navigating portals and pages.

Reset a forgotten password

1. On the sign-in page, click **Forgot your password?**.

   The password reset page opens. It has an **Email address** field and a **Submit Password Reset Request** button.



The password reset page. Enter your email address and click Submit Password Reset Request.

1. Email address
2. Submit Password Reset Request

2. In **Email address**, type the email address your account uses.
3. Click **Submit Password Reset Request**.

   The page says that an email with password reset instructions will be sent to the address you entered.
4. Open the email and follow its instructions.
5. Sign in with the temporary password the email provides.

   The **Change Password** screen opens.
6. On **Change Password**, set a new password.

   Your new password is saved. If repeated failed attempts blocked your sign-in, changing your password clears the block.

Stay signed in when the Stay Logged In? window appears

1. When the **Stay Logged In?** window appears, read the message "Your session is about to expire, sign in to extend the session?".
2. In the window, type the email address your account uses.
3. In the window, type your password.
4. Click **Login**.

   You are signed in again and your session is extended, as the window's message describes.

Reference

Sign-in page elements

ON SCREEN	WHAT IT IS FOR
Username (email)	The email address your IRIS10 account uses. The text under it reads "We will never share your email address with other parties."
Password	Your IRIS10 password.
Password toggle button (no text)	A button beside the **Password** field.
Login	Submits your username and password.
Forgot your password?	Opens the password reset page.
Version: … Build Date: …	Shows the IRIS10 version and build date of the site you are using.

Password reset page elements

ON SCREEN	WHAT IT IS FOR
Email address	The email address your IRIS10 account uses.
Submit Password Reset Request	Asks IRIS10 to email you password reset instructions.

Sign-in messages

MESSAGE	WHAT IT MEANS	WHAT TO DO
`Invalid login and/or password.`	The username or password is wrong.	Check both fields and try again. If you have forgotten your password, use **Forgot your password?**.
`Too many failed sign-in attempts. Please wait and try again later, or use Forgot Password.`	Sign-in from your location is blocked for a while after repeated failed attempts. The message does not say how long the block lasts.	Wait and try again later, or reset your password with **Forgot your password?** and sign in with the temporary password from the email.

Tips and notes

> **Important:** If you see "Too many failed sign-in attempts. Please wait and try again later, or use Forgot Password.", don't keep retrying. Either wait, or click **Forgot your password?** and sign in with the temporary password from the email. That takes you to **Change Password**, and changing your password clears the block.

> **Note:** Clicking **Login** ends any session already open in that browser before it checks your password. A failed attempt therefore also signs that browser out.

> **Note:** The password reset page has no link back to the sign-in page.

> **Note:** IRIS10 signs you out when your session ends. Save your work before you step away.

> **Tip:** The bottom of the sign-in page shows the version and build date, for example `Version: 10.47.0-dev.1840 Build Date: 11/05/2026 - 04:31 PM`. Include this when you report a problem.

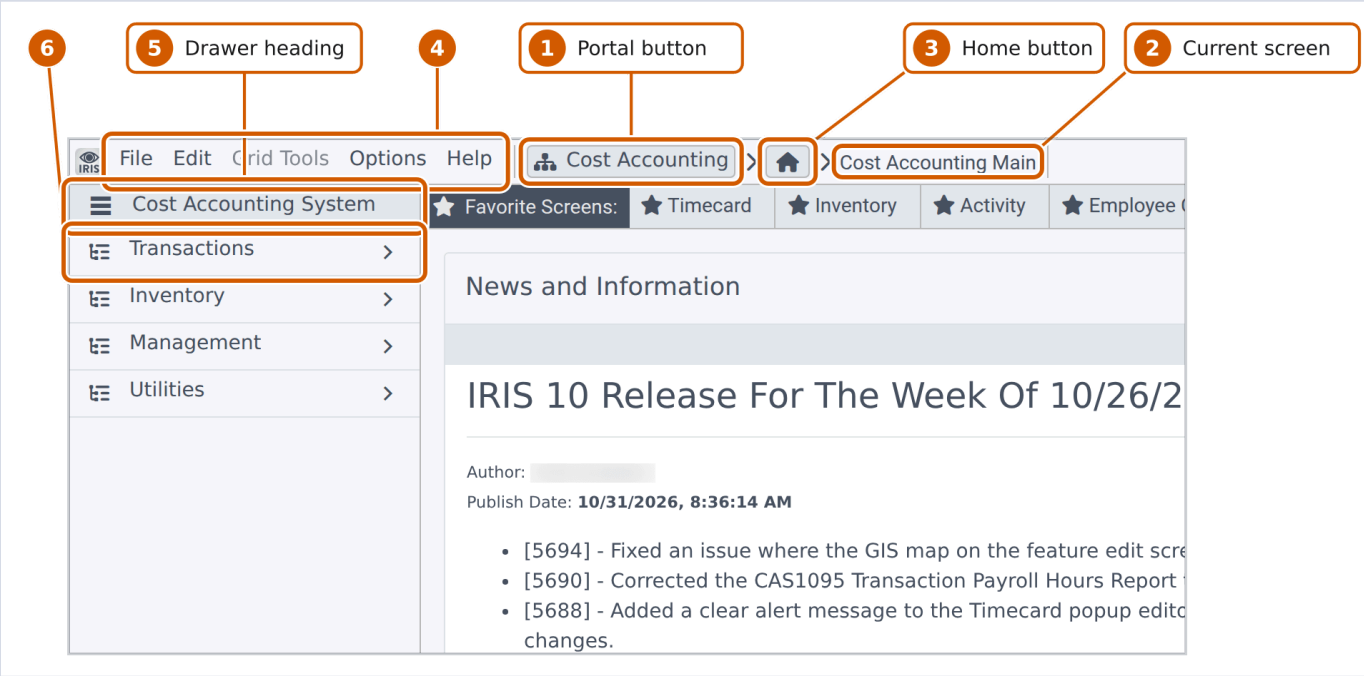
Related topics

- Navigating portals and pages

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

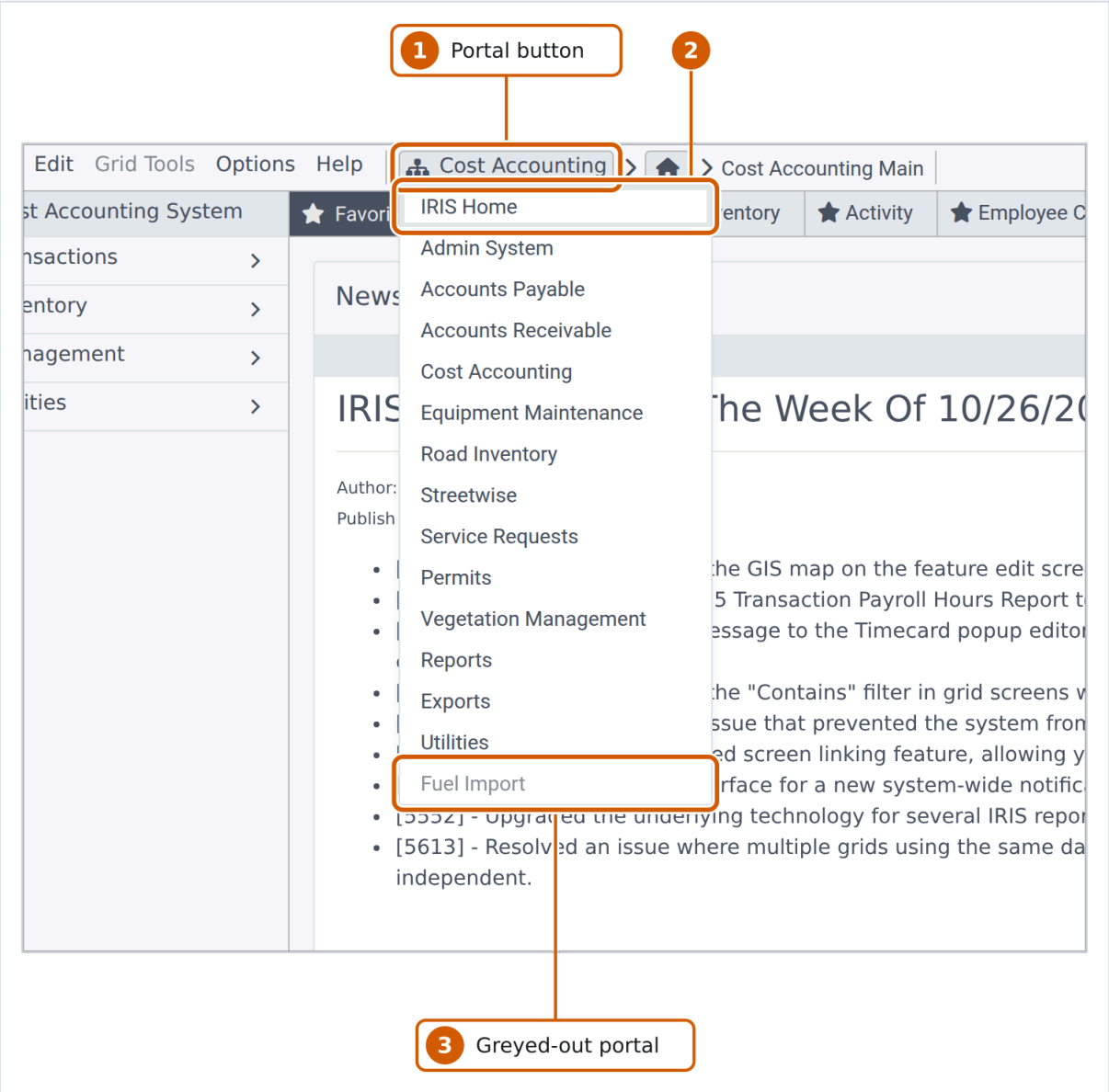
- You are signed in to IRIS10 (see Logging in).
- You know which portal you intend to use (for example, **Cost Accounting** or **Road Inventory**).

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

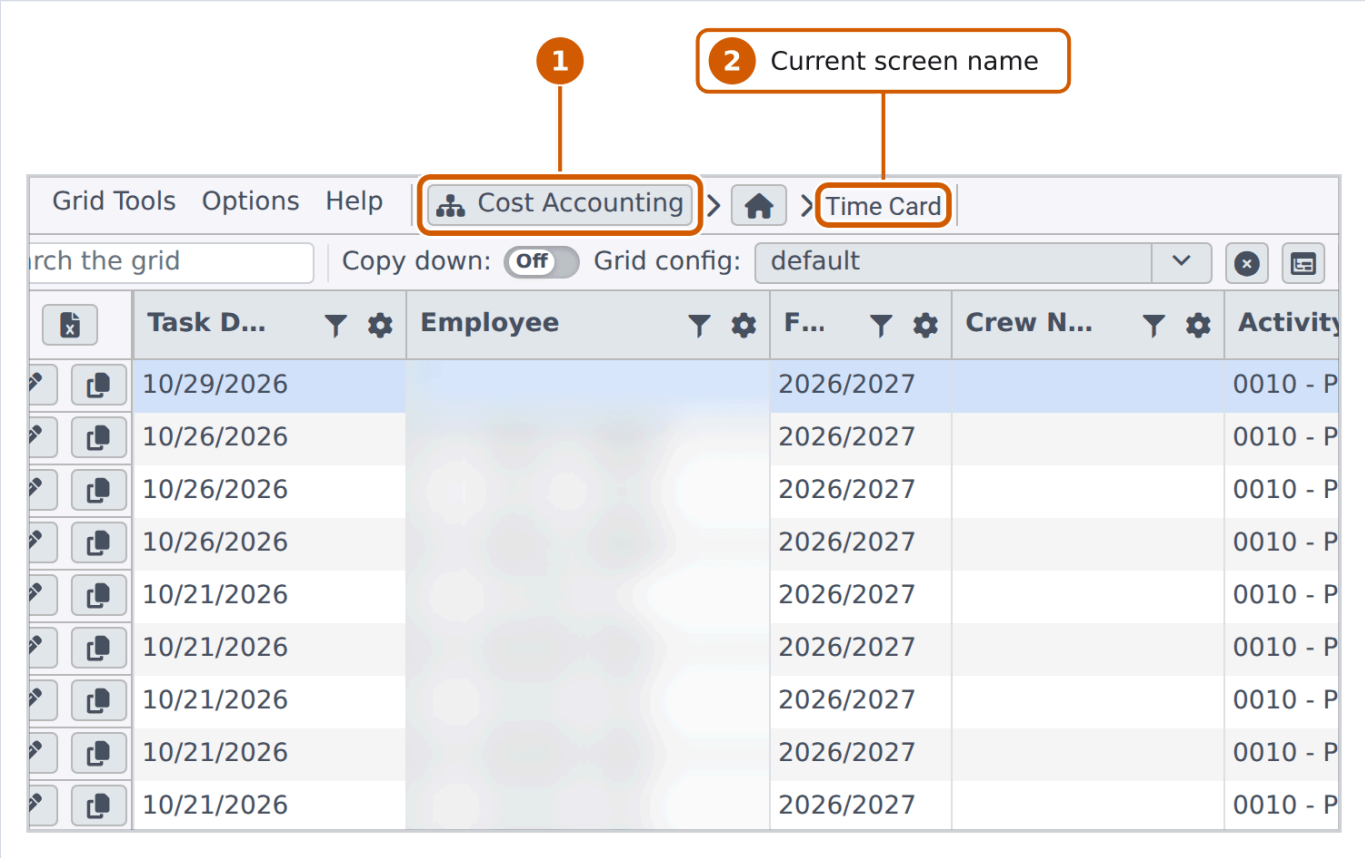
2. Click the name of the portal you want, for example **Road Inventory**. The portal opens in a new browser tab. The original portal stays open in its own tab.

> **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.

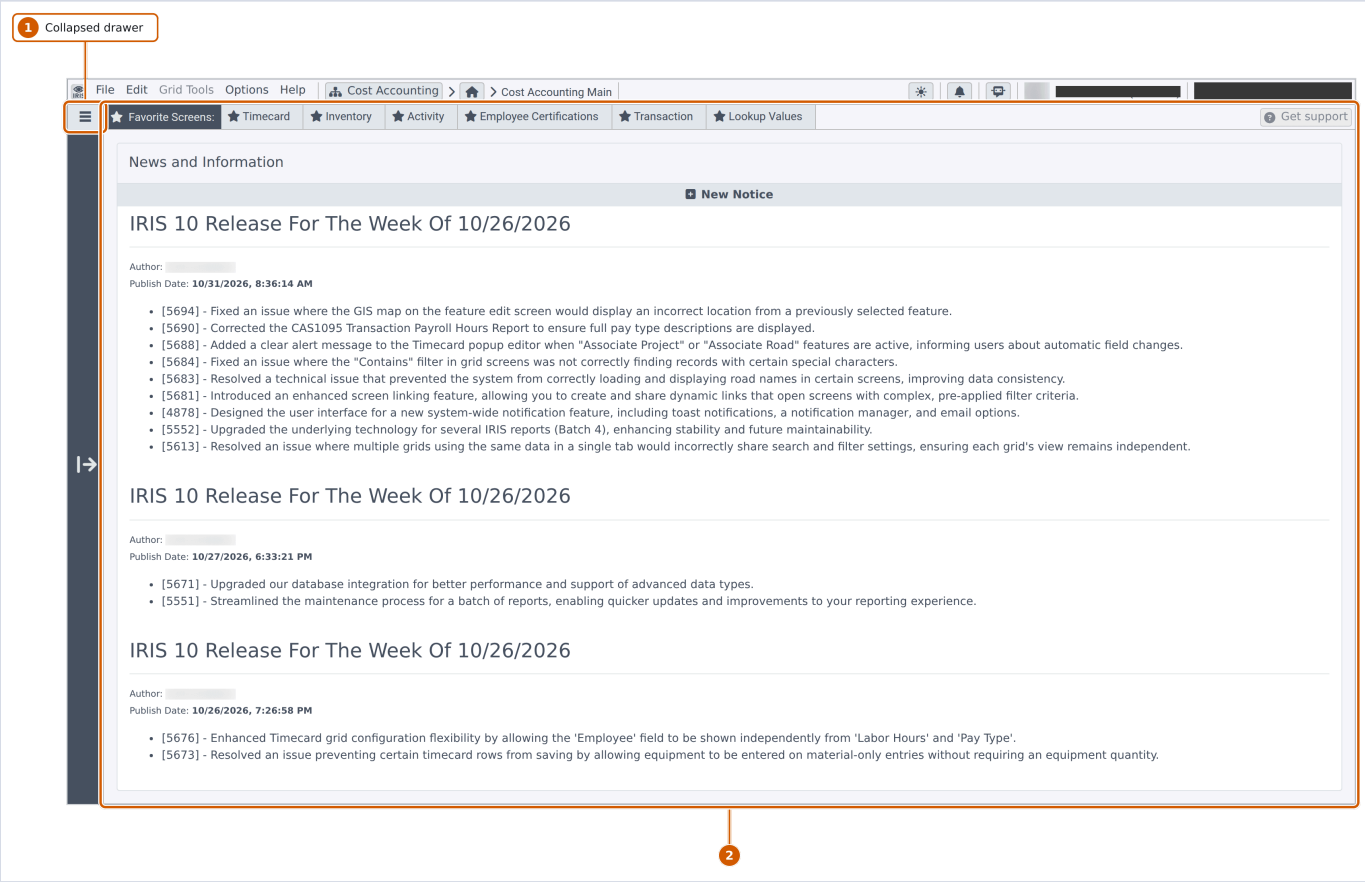
Return to the portal dashboard

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**.

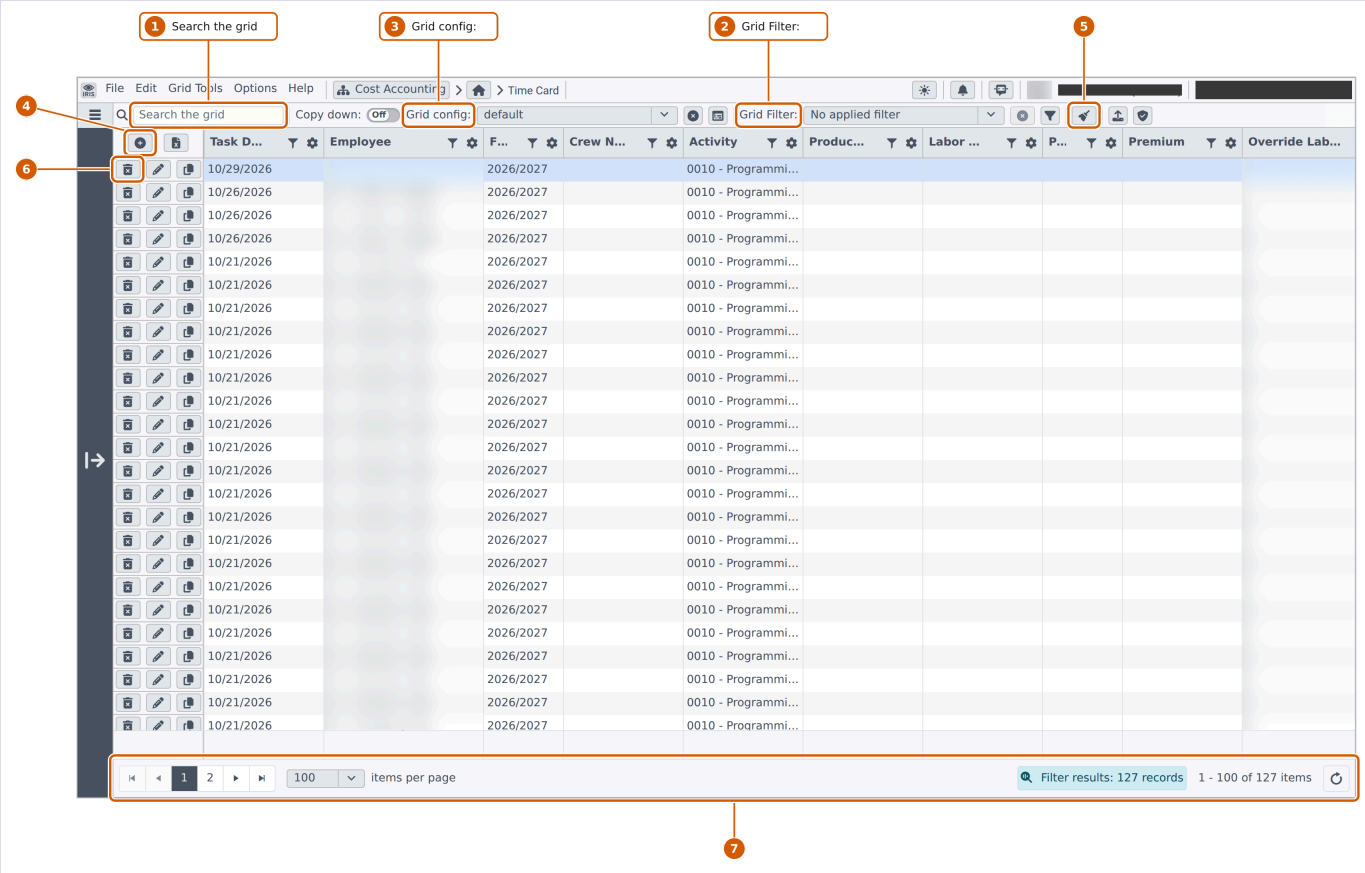
Related topics

- Logging in
- Data grid overview and basics

Data grid overview and basics

Overview

You see the same grid layout on most IRIS10 lists. This page uses Time Card as the example. On a grid, you see a toolbar above the rows, column headings, row buttons, and a pager at the bottom.



The Time Card grid shows the parts most IRIS10 grids share.

1. Search the grid
2. Grid Filter:
3. Grid config:
4. Add new record
5. Bulk delete mode
6. Row buttons: Delete, Edit, Duplicate, view cell
7. Pager and record count

In this topic, you learn to:

- Recognize the parts of an IRIS10 grid: toolbar, column headings, row buttons, and pager.
- Find records with **Search the grid**, sorting, and paging.
- Open a column's menu and see what it offers.

- Find where to start adding, editing, duplicating, and deleting records.

Before you begin

- You can sign in to IRIS10.
- You can open a page that contains a grid, for example Time Card at `/cas/timecard`. See Navigating portals and pages.

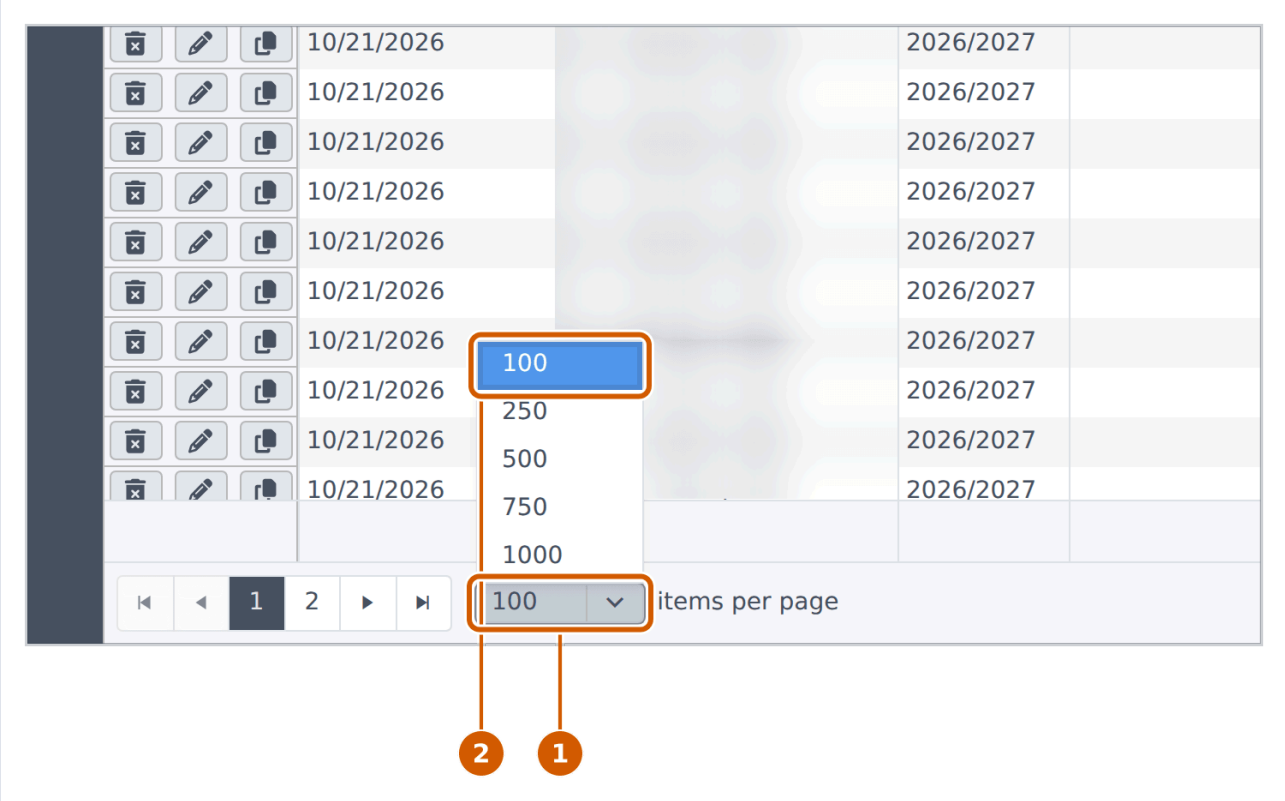
Procedure

Check how many records the grid holds and change the page size

1. Look at the pager at the bottom of the grid.

   The pager shows the page buttons, the items-per-page setting and the record count, for example `Filter results: 127 records` and `1 - 100 of 127 items`.
2. Click the **Page sizes** drop-down in the pager.

   The list offers 100, 250, 500, 750 and 1000.



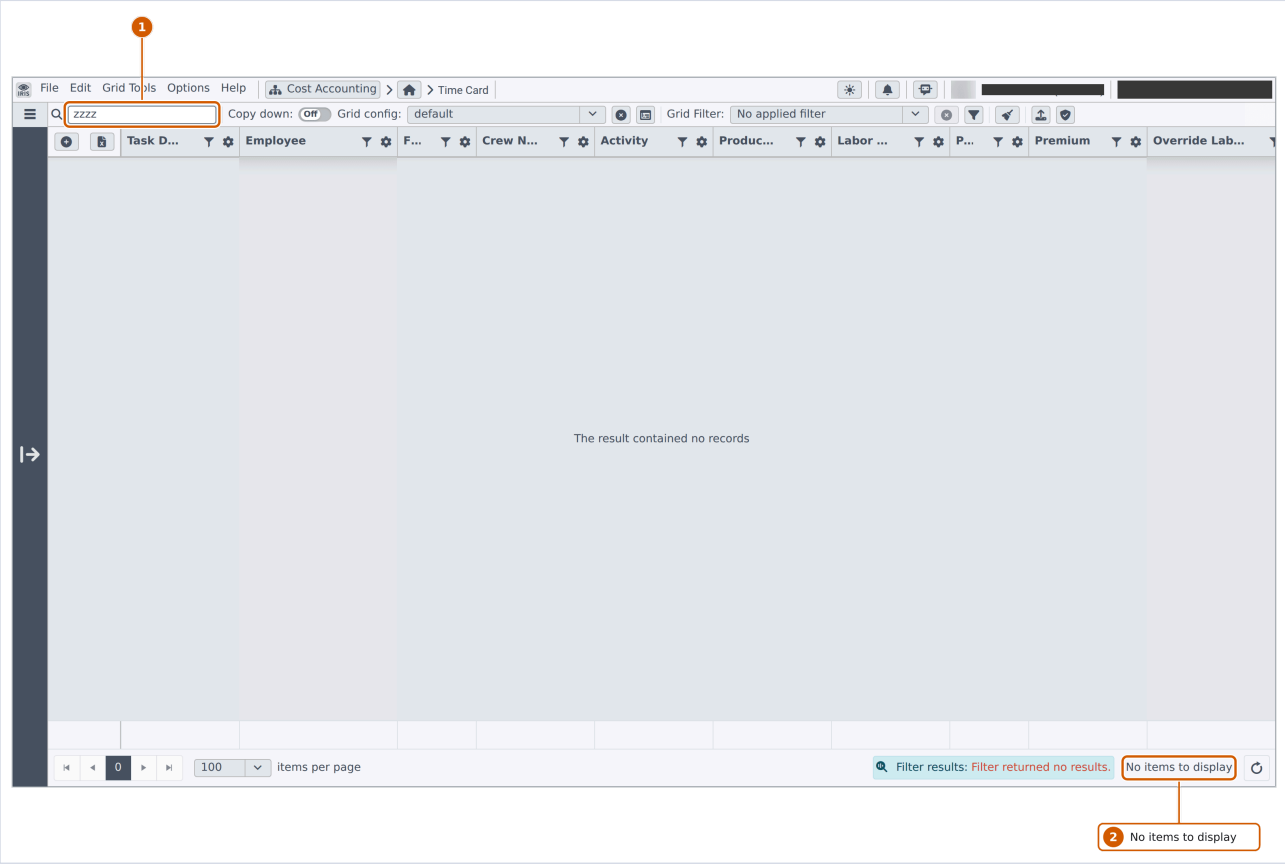
Choose how many rows to show on each page.

   1. Page sizes
   2. Page size choices
3. Choose the number of rows you want to see on each page.

Search the grid

1. Click the toolbar box that shows **Search the grid**.
2. Type the text you want to find.
3. Press Enter.

   The grid updates. If nothing matches, the pager shows `Filter returned no results.` and `No items to display`.



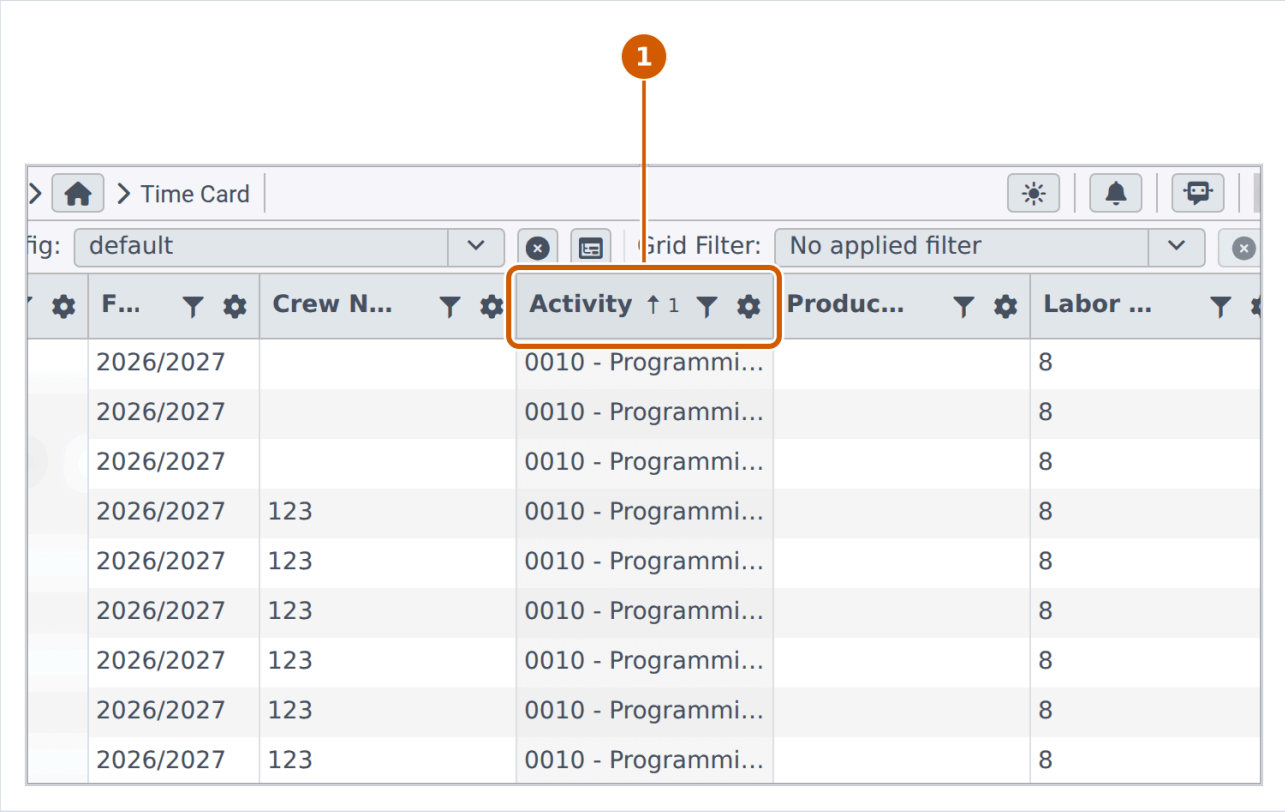
When a search finds nothing, the pager shows 'No items to display'.

1. Search text
2. No items to display

Sort by a column

1. Click a column heading, for example **Activity**.

   The grid sorts the rows in ascending order by that column, and the heading shows `1` next to the column name (for example `Activity 1`).



Click a column heading to sort by that column.

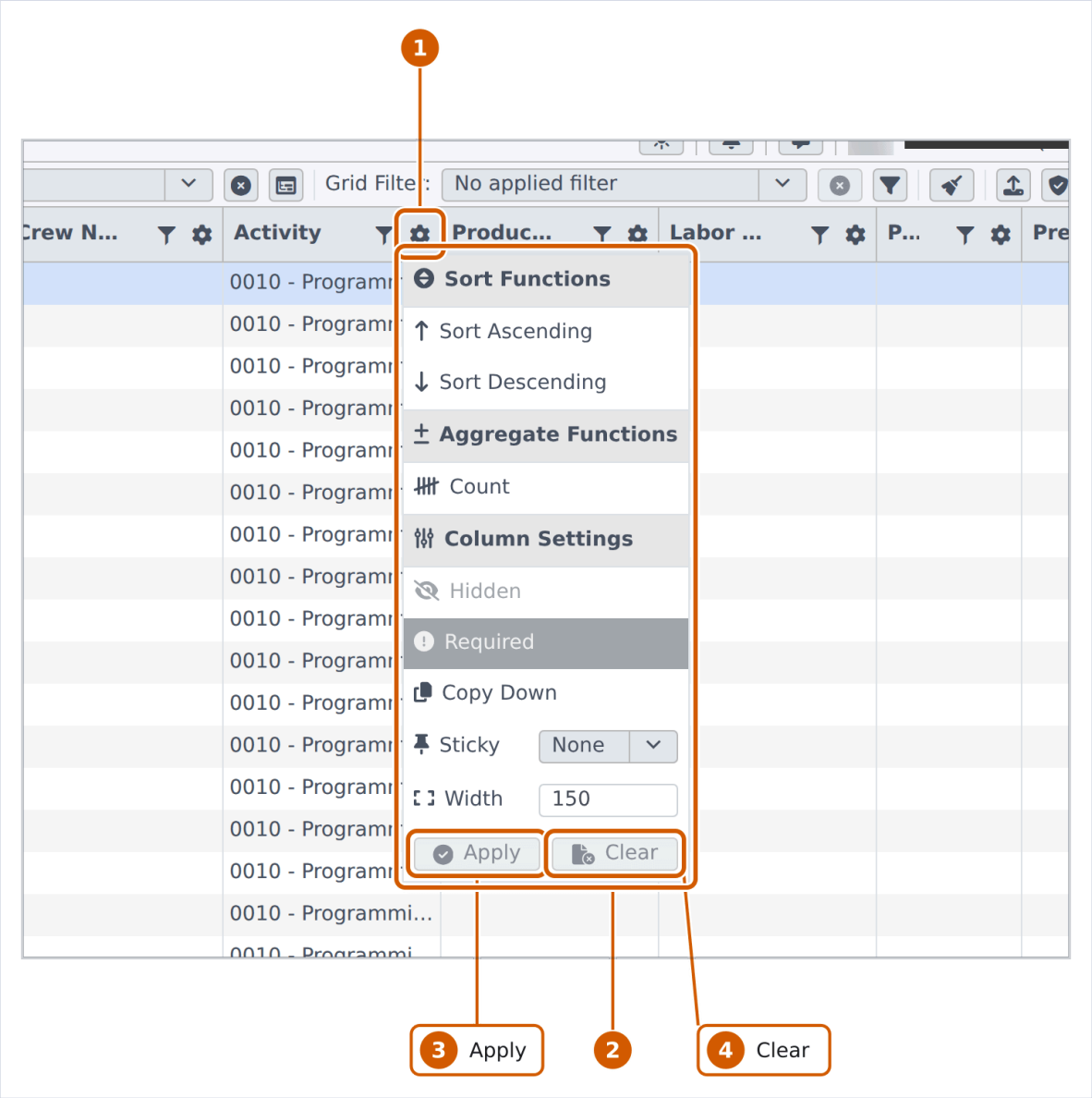
1. Sorted column (Activity 1)

2. To sort additional columns, click another column heading.

Open a column's menu

1. In the column heading, click the column menu icon. It has no text label.

   A menu opens with three sections: **Sort Functions** (Sort Ascending, Sort Descending), **Aggregate Functions** (Count) and **Column Settings** (Hidden, Required, Copy Down, Sticky, Width). It also has **Apply** and **Clear** buttons.



The column menu for Activity has Sort Functions, Aggregate Functions and Column Settings.

1. Column menu icon
2. Column menu
3. Apply
4. Clear

2. Choose **Sort Ascending** or **Sort Descending** to sort by this column.
3. To change a column setting, use the **Column Settings** section.

   Apply (tooltip: "Apply grid configuration.") and **Clear** (tooltip: "Clear grid configuration.") stay unavailable until you make a change.

> **Note:** For saving settings, see Grid configurations.

Start working with records

The toolbar also has a **Bulk delete mode** button (tooltip: "Click to enter bulk delete mode."). For details on working with records, including bulk delete, see Grid viewing and editing.

1. To add a record, click the add button above the grid. Its tooltip is "Add new record. (ctrl shift a)".
2. To change a record, click the row's "Edit record (ctrl+shift+e)" button.

   The record opens in a pop-up window for editing.
3. To copy a record, click the row's "Duplicate record" button.
4. To remove a record, click the row's "Delete record" button.

   IRIS10 asks "Are you sure you want to delete this record?" before it deletes anything.

   > **Note:** You can delete only if your security level allows it. IRIS10 checks this when you delete. If you cannot delete, ask your administrator.

Reference

Grid toolbar and row controls (Time Card example)

CONTROL	ON-SCREEN LABEL OR TOOLTIP	PURPOSE
Search box	Search the grid	Type text and press Enter to search the grid.
Grid filter drop-down	Grid Filter:	Choose a grid filter (see Grid filters).
Grid configuration drop-down	Grid config:	Choose a grid configuration (see Grid configurations).
Add button	Add new record. (ctrl shift a)	Add a new record.
Bulk delete button	Bulk delete mode (tooltip: Click to enter bulk delete mode.)	Enter bulk delete mode.
Row button	Edit record (ctrl+shift+e)	Edit the record in a pop-up window.
Row button	Duplicate record	Copy the record.
Row button	Delete record	Delete the record after confirmation.
Row button	Click to view the cell contents.	View the cell contents.

Page sizes

GRID TYPE	PAGE SIZES OFFERED
Main grid	100, 250, 500, 750, 1000
Child (nested) grid	5, 10, 50, 100, 150, 200

Column menu contents

SECTION	ITEMS
Sort Functions	Sort Ascending, Sort Descending
Aggregate Functions	Count
Column Settings	Hidden, Required, Copy Down, Sticky (shows `None`), Width
Buttons	Apply, Clear

What you can do on the main grid

CAPABILITY	AVAILABLE
Sort by more than one column	Yes
Resize columns	Yes
Reorder columns	Yes
Select rows	One row at a time
Group rows by column	No (Time Card)

Tips and notes

Tip: Keyboard shortcuts appear in the tooltips: ctrl shift a adds a record, and ctrl+shift+e edits a record.

Note: Grids that track notes show a **Notes** column, which you cannot sort by. Most of these grids also show a **Documents** column.

Note: If a search finds nothing, the pager shows `Filter returned no results.` and `No items to display`.

Important: Deleting a record always asks for confirmation first. Read the message before you continue.

Note: Main grids use larger page sizes (100 to 1000) than child grids nested inside a record (5 to 200).

Related topics

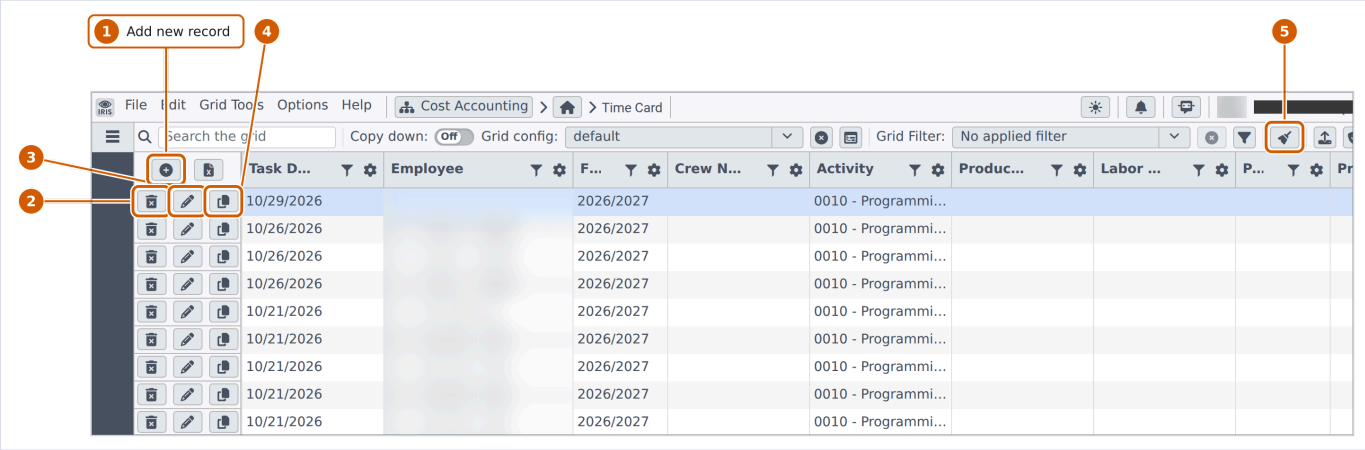
- Grid viewing and editing
- Grid configurations
- Grid filters
- Navigating portals and pages

Grid viewing and editing

Overview

Most IRIS10 grids edit records in a pop-up window. Some lookup and reference screens edit within the row instead. This page uses the Time Card grid as the example.

The **Add** button is in the grid header. The **Delete**, **Edit**, and **Duplicate** buttons are on each row. The toolbar also has the **Bulk delete mode** button.



The Time Card grid with the Add button in the header and the Delete, Edit, and Duplicate buttons on each row.

1. Add new record
2. Delete record
3. Edit record
4. Duplicate record
5. Bulk delete mode

With this page you can:

- Add a new record using the pop-up editor.
- Edit an existing record and cancel changes you do not want.
- Duplicate a record to start a similar new one.
- Recognize and fix required-field messages before saving.
- Delete a record using the confirmation message.
- Use Copy Down to fill repeated values into new records, and choose which columns copy.

Before you begin

- Sign in to IRIS10.
- Open a grid screen such as Time Card. See Navigating portals and pages.
- Know the grid basics: paging, sorting, searching, and column menus. See Data grid overview and basics.

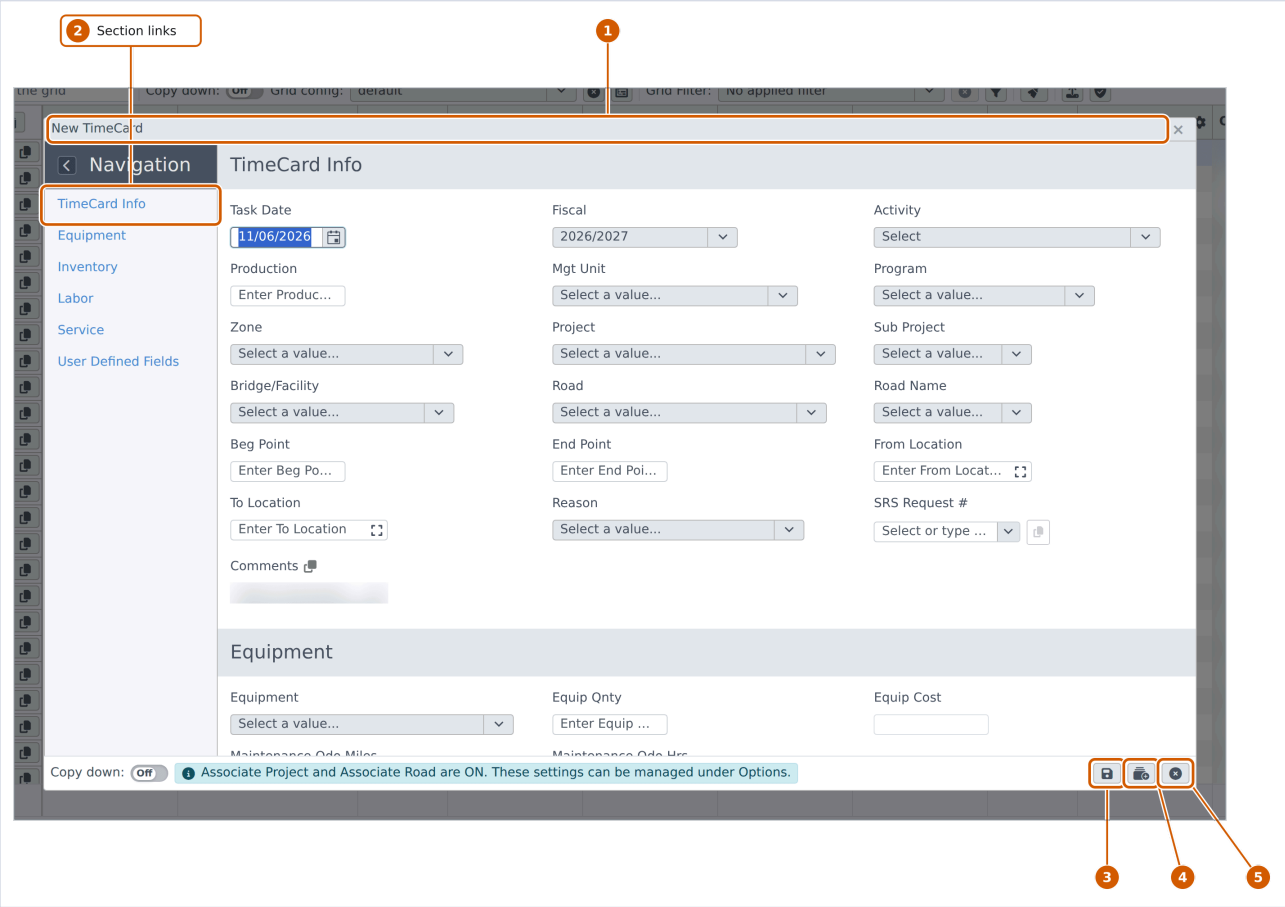
- Check your security access. The Add, Edit, Duplicate, and Delete buttons appear only if your security access for the screen allows those actions. If a button is missing, ask your IRIS10 administrator.

Procedure

Add a new record

1. In the grid header, click the Add button (tooltip "Add new record. (ctrl shift a)"). A pop-up window opens with a title such as "New TimeCard".

> **Note:** The Add button appears only if your security access allows adding records on this screen. If you do not see it, ask your administrator.



The New TimeCard window, with section links and the Save, Save and Add New and Cancel buttons.

1. Window title
2. Section links
3. Save
4. Save and Add New
5. Cancel

2. Click a section link at the side of the window (for example **Time Card Info**, **Equipment**, **Inventory**, **Labor**, **Service**, or **User Defined Fields**). The form scrolls to that section.
3. Fill in the fields, including every required field (for example **Task Date**).
4. Click **Save** (tooltip "Click to save the current record.") to save the record.
5. Alternatively, click **Save and Add New** to save the record and start another new record.

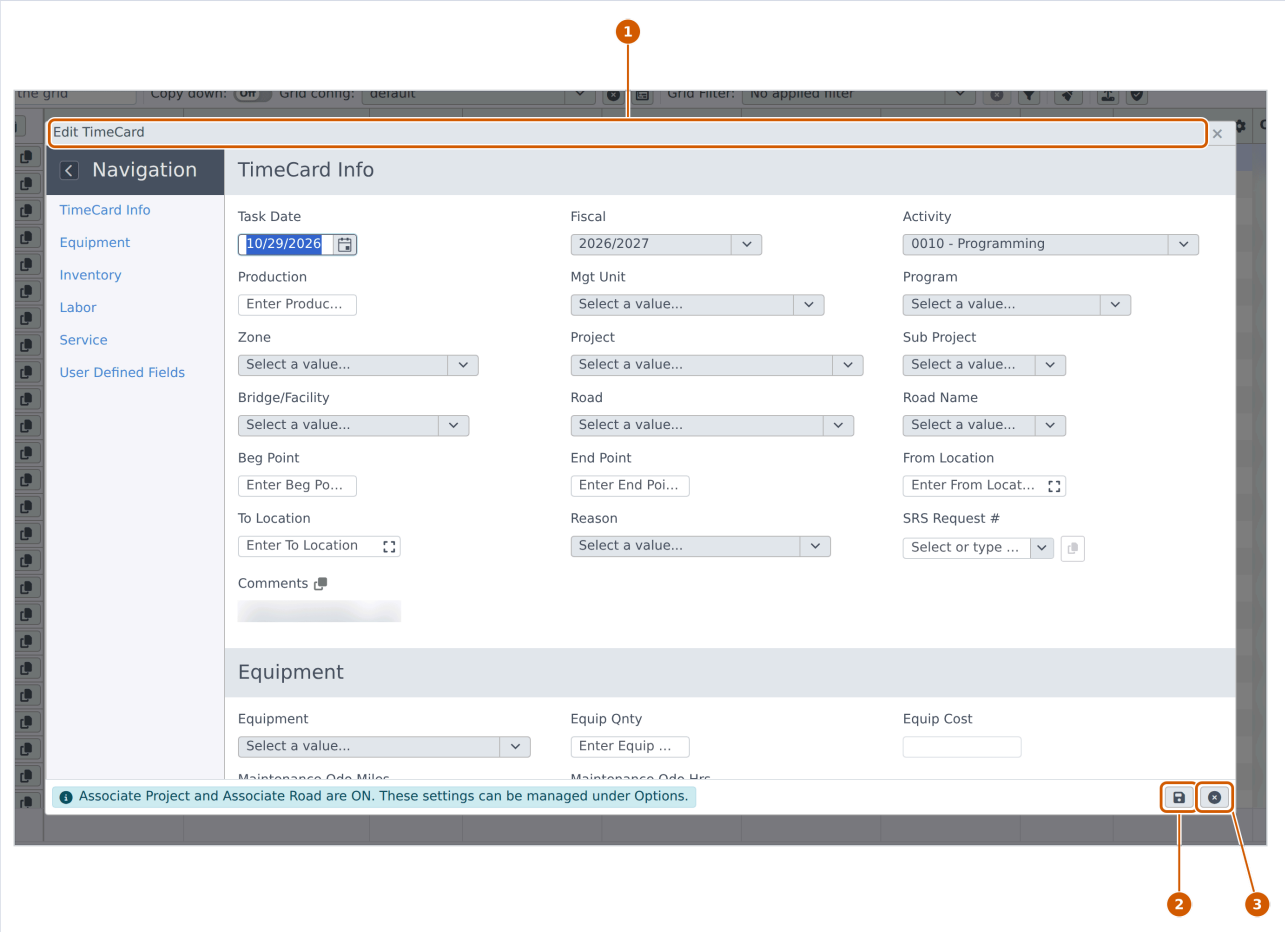
> **Note: Save and Add New** is shown only when you are adding a new record.

6. To leave without saving, click **Cancel** (tooltip "Click to cancel the edit operation.").

Edit a record

1. In the row you want to change, click the Edit button (tooltip "Edit record (ctrl+shift+e)"). A pop-up window opens with a title such as "Edit TimeCard", showing the same fields and section links as when adding.

> **Note:** Row buttons appear only if your security access allows editing on this screen.



The Edit TimeCard window. Save and Add New is not offered when editing.

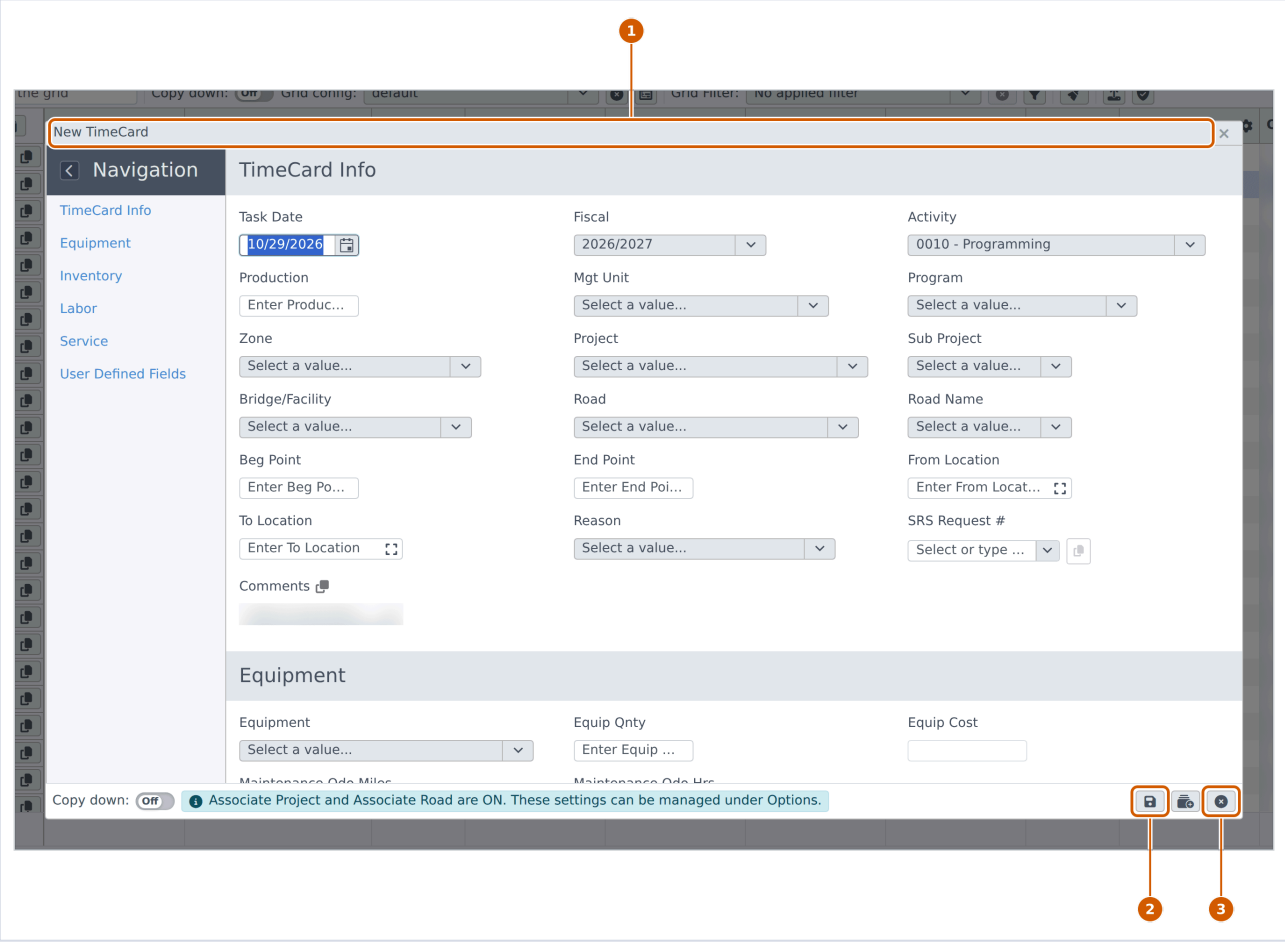
1. Edit TimeCard
2. Save
3. Cancel

2. Change the fields you need. Some fields may be greyed out and cannot be changed.
3. Click **Save** (tooltip "Click to save the current record.") to keep your changes. **Save and Add New** is not offered when editing an existing record.
4. To discard your changes, click **Cancel** (tooltip "Click to cancel the edit operation.") instead of **Save**.

Duplicate a record

1. In the row you want to start from, click the Duplicate button (tooltip "Duplicate record"). A pop-up window titled "New TimeCard" opens, with **Save** and **Cancel** buttons.

> **Note:** The Duplicate button appears only if your security access allows adding records on this screen, and only on screens that include it.



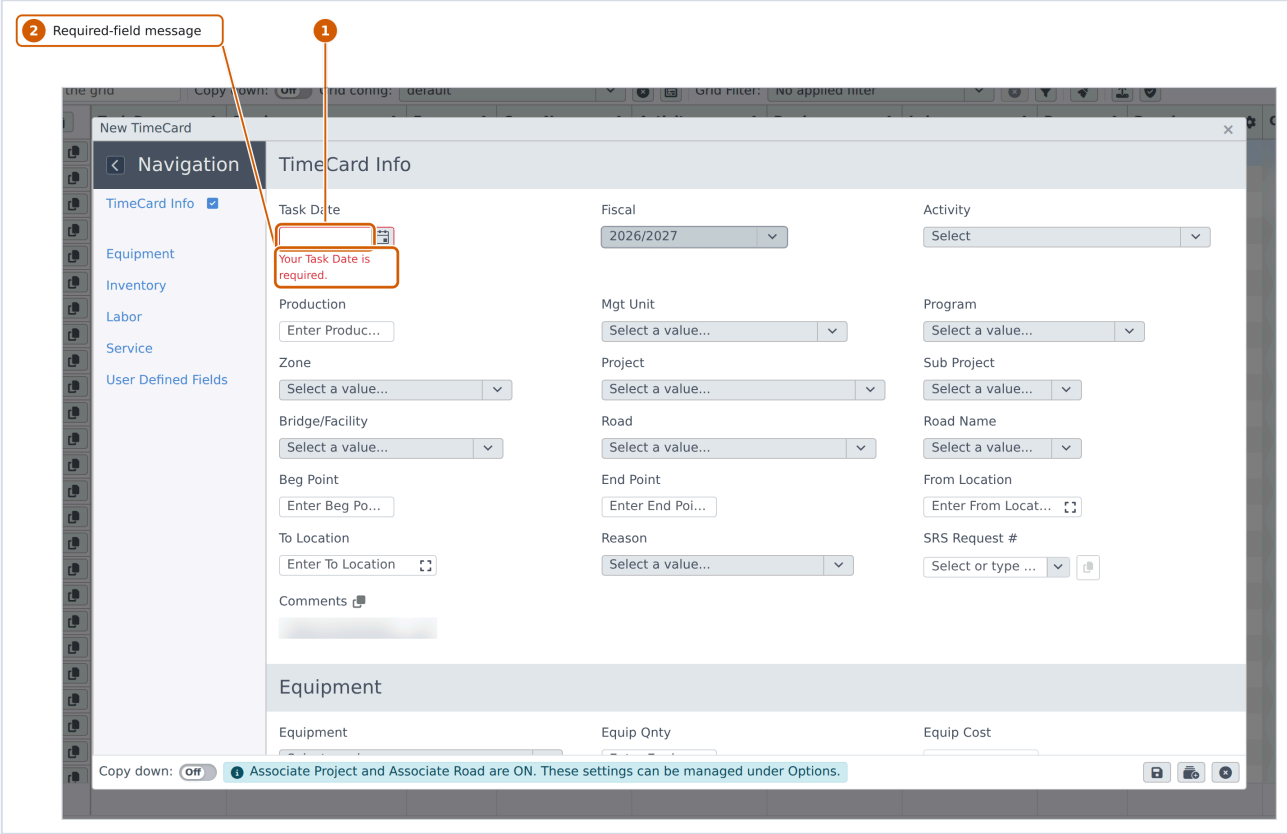
Duplicate record opens a New TimeCard window.

1. New TimeCard
2. Save
3. Cancel

2. Review and change the fields as needed.
3. Click **Save** (tooltip "Click to save the current record.") to create the new record.
4. To discard the new record, click **Cancel** instead of **Save**.

Fix a required-field message

1. Before you start, look for columns whose header is marked as required (on Time Card, **Task Date**).
2. In the pop-up editor, leave a required field empty and move to the next field. The field is marked invalid and a message such as "Your Task Date is required." appears below it.



A required field left empty shows a message below it: "Your Task Date is required."

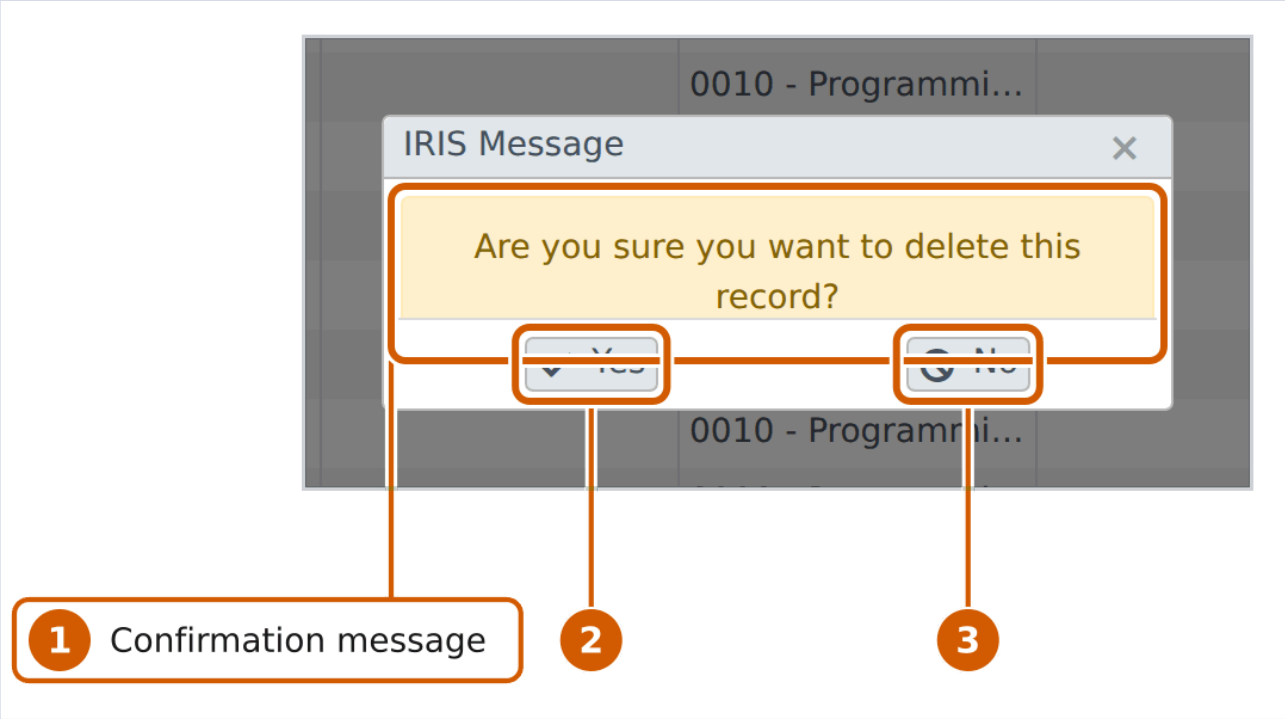
1. Required field left empty
2. Required-field message

3. Enter a value in the field.

Delete a record

1. In the row you want to remove, click the Delete button (trash icon, tooltip "Delete record"). An "IRIS Message" window asks, "Are you sure you want to delete this record?" with **Yes** and **No** buttons.

> **Note:** The Delete button appears only if your security access allows deleting on this screen. Deleting usually needs more access than editing. If you do not see it, ask your administrator.



The IRIS Message window asks you to confirm before a record is deleted.

1. Confirmation message
2. Yes – delete
3. No – keep the record

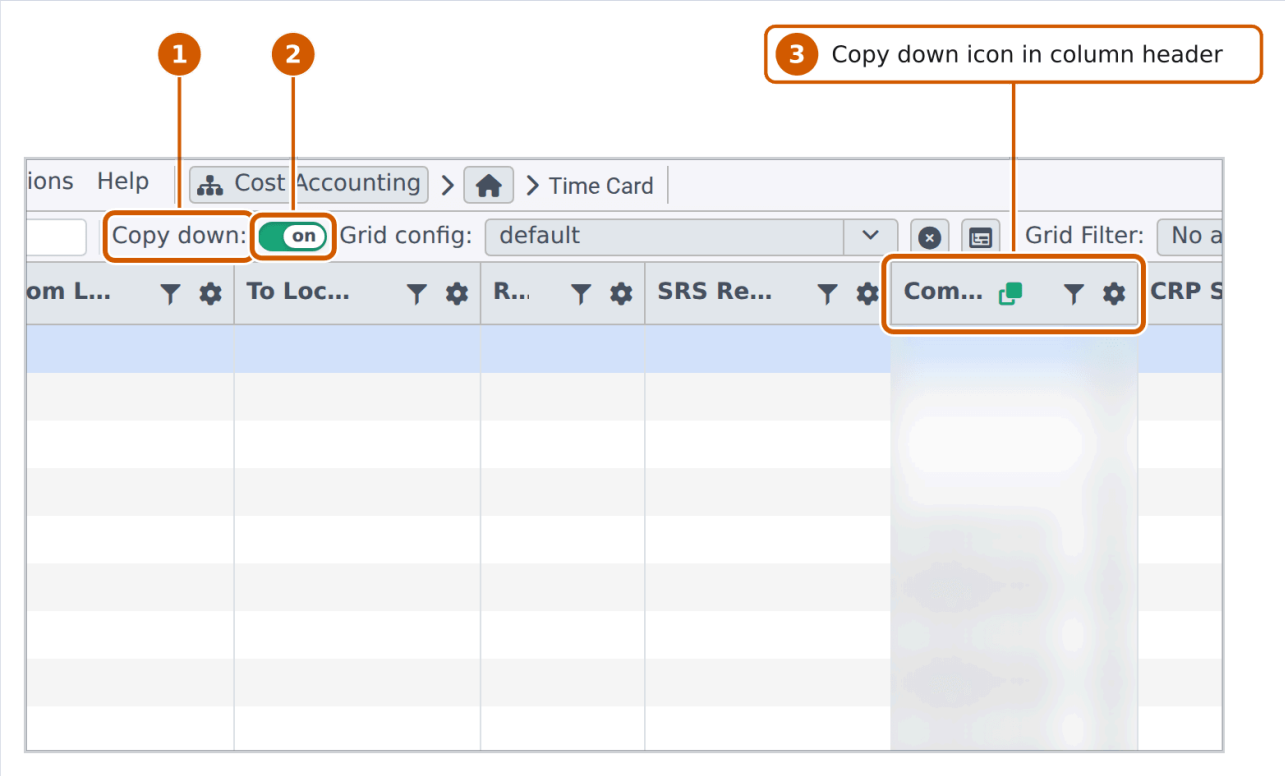
2. Click **Yes** to delete the record.
3. To keep the record, click **No**.

The toolbar also has the **Bulk delete mode** button (tooltip "Click to enter bulk delete mode.").

Use Copy Down to enter a series of similar records

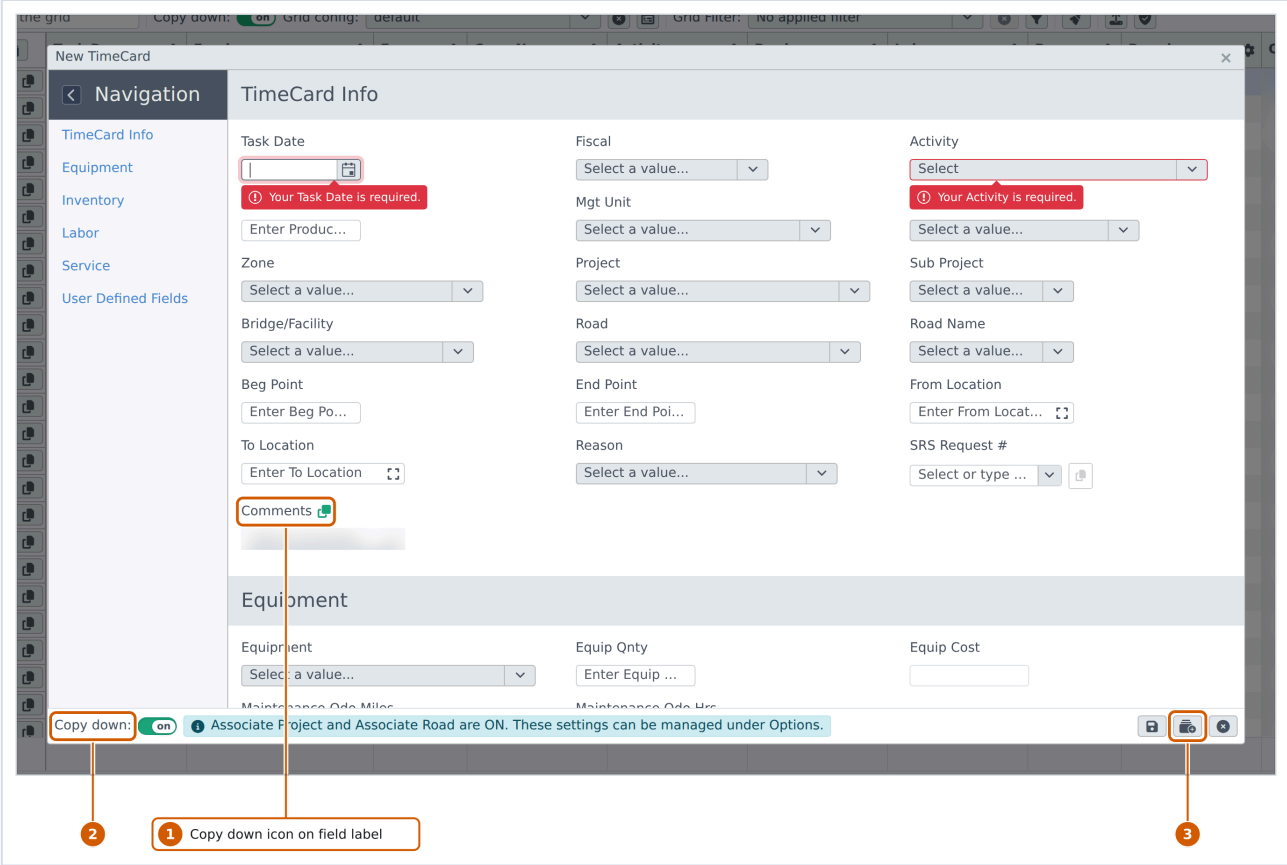
When **Copy down:** is on, adding a new record fills the fields set to Copy down from the selected row, so you only have to make additions or edits to the new record.

1. In the grid toolbar, turn on the **Copy down:** switch. Toggle on the Copy down switch to turn it on; it will turn green to indicate Copy down is active. By default, Copy down is turned off when you start a new IRIS session.



The Copy down switch turned on in the toolbar. The Copy down icon in a column header marks a column that copies.

1. Copy down:
   1. Copy down switch
   2. Copy down icon in column header
2. Click the existing row whose values you want to copy. The row is selected.
3. Click the Add button (tooltip "Add new record. (ctrl shift a)"). The "New TimeCard" window opens. Fields marked with the Copy down icon are filled from the selected row. Other fields start blank or at their usual defaults.



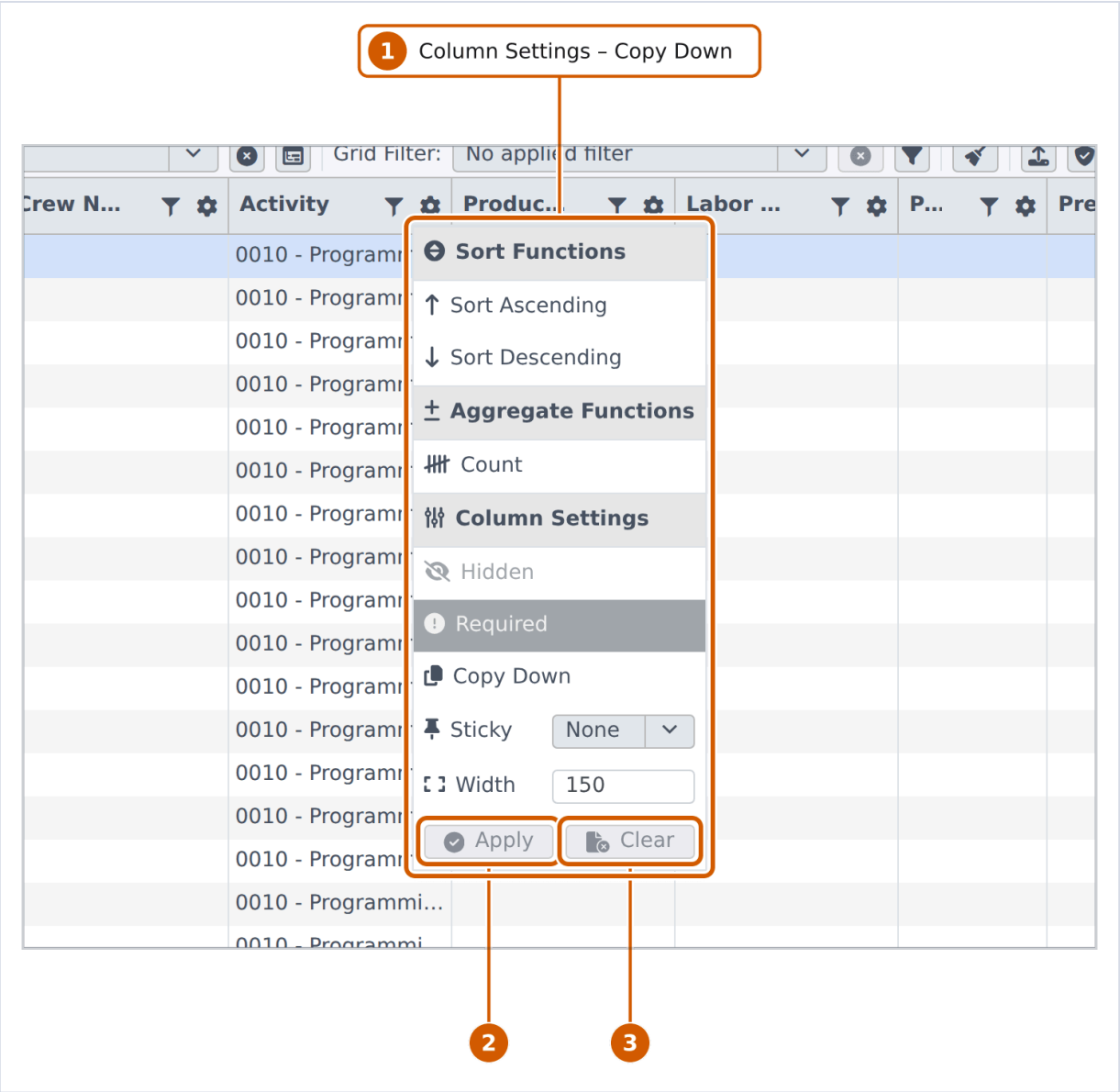
The New TimeCard window opened with Copy Down on. The Copy down icon on a field label marks a field that copies, and the window has its own Copy down switch.

1. Copy down icon on field label
2. Copy down switch in the editor
3. Save and Add New

4. Change only the fields that differ for this record, and fill in any remaining required fields.
5. To enter another similar record straight away, click **Save and Add New**. The record is saved and a new record opens, with the Copy Down fields filled from the record you just saved.
6. When you have entered the last record, click **Save** (tooltip "Click to save the current record.").
7. Turn off the **Copy down:** switch when you no longer want values copied.

Choose which columns Copy Down

1. In the column header, click the column menu icon. The column menu opens with **Sort Functions**, **Aggregate Functions** and **Column Settings** (**Hidden**, **Required**, **Copy Down**, **Sticky**, **Width**), plus **Apply** and **Clear** buttons.



The column menu's Column Settings include Copy Down, used to choose whether the column copies.

1. Column Settings – Copy Down
2. Apply
3. Clear

2. Under **Column Settings**, click **Copy Down** to turn it on or off for this column.

> **Note: Copy Down** is unavailable (greyed out) for locked or read-only columns.

3. Click **Apply** (tooltip "Apply grid configuration."). Columns set to Copy Down show the Copy down icon in their header.
4. To change several columns at once, open the **Grid config editor** from the toolbar and use its **Copy Down** column.
5. Save the configuration. See Grid configurations.

Other editing styles

Some lookup and reference screens edit within the row (inline). The grid filter conditions grid edits cell by cell. New rows appear at the top by default. See Grid filters.

Reference

Grid editing buttons

BUTTON (AS SHOWN)	WHERE	WHAT IT DOES	KEYBOARD SHORTCUT
Add new record. (ctrl+shift+a)	Grid header	Opens a New window for a new record	ctrl+shift+a
Edit record (ctrl+shift+e)	Each row	Opens the Edit window for that row	ctrl+shift+e
Duplicate record	Each row	Opens a New window started from that row	ctrl+shift+d
Delete record	Each row	Asks for confirmation, then deletes the row	ctrl+q
Click to view the cell contents.	Each row	Shows the contents of a cell (may be greyed out)	—
Bulk delete mode	Toolbar	"Click to enter bulk delete mode."	—
Copy down:	Toolbar	Turns Copy Down on or off	—

Pop-up editor buttons

BUTTON	TOOLTIP	WHEN SHOWN
Save	Click to save the current record.	Adding, editing and duplicating
Save and Add New	—	Adding a new record only
Cancel	Click to cancel the edit operation.	Adding, editing and duplicating
Copy down:	On/off switch	Adding a new record only

What Copy Down copies

SITUATION	RESULT
Copy down on, existing row selected, Add clicked	Fields set to Copy Down are filled from the selected row
Copy down on, no row selected	The editor opens empty; no message is shown
Save and Add New	The next new record copies from the record just saved (once); later adds use your selected row again
Duplicate record	Copy Down is not applied
Fields not set to Copy Down	Blank, except checkboxes that are normally ticked for a new record

SITUATION	RESULT
Record ID, created/updated date and user	Never copied
Read-only (system-filled) columns	Cannot be set to Copy Down
Your Default Date	Used only when nothing was copied
Child (nested) grids	A new child record copies from the newest child record of the same parent; the first child has nothing to copy

Tips and notes

Important: Deleting always asks for confirmation in an "IRIS Message" window. Check that you clicked the right row before choosing **Yes**.

Note: If the Add, Edit, Duplicate, or Delete buttons are missing, your security access for that screen does not allow that action. Ask your IRIS10 administrator.

Tip: The **Copy down** icon (tooltip "Copy down") appears after the column title in the grid header and after the field label in the new-record editor. It shows which fields will copy, even when the **Copy down:** switch is off.

Note: Copy Down starts in the off position each time you sign in. Your on/off choice is kept for the rest of the session and is not stored in a saved grid configuration.

Tip: Select the row you want to copy before you click Add. If no row is selected, the new record opens empty and no message is shown.

Note: Hiding a column also turns off its **Copy down** setting, and turning **Copy down** on for a hidden column makes it visible again.

Note: Some screens, such as Audit History, do not have a **Copy down** switch.

Tip: When you change the **Copy down** switch in the new-record editor, the toolbar switch changes too.

Related topics

- Data grid overview and basics
- Grid configurations
- Grid filters
- Navigating portals and pages

Grid configurations

Overview

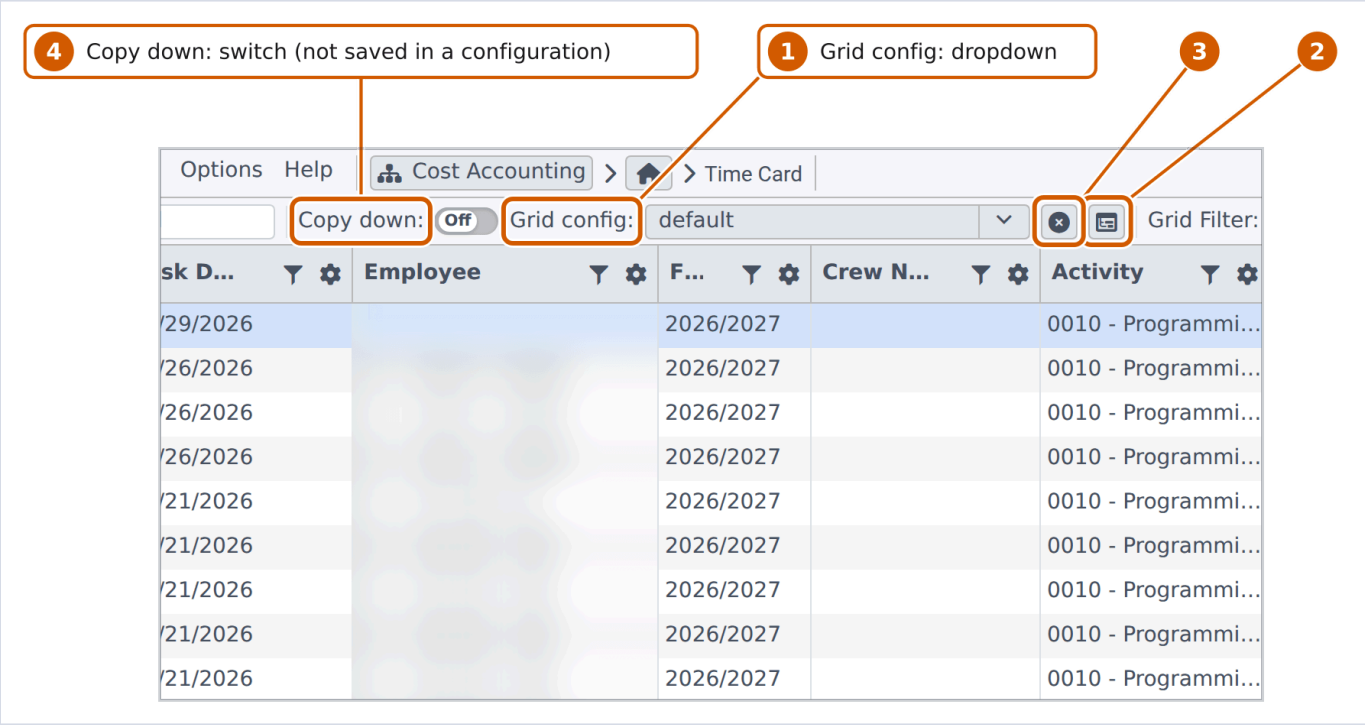
You use a Grid configuration to save a named column layout for one screen. A Grid configuration belongs to one user. Your Grid configuration holds these settings:

- Column order
- Hidden
- Required
- Copy Down
- Sort

Your Grid configuration does not hold filters or page size.

IRIS10 also has a built-in entry named `default`. It is the first entry in the list of configurations.

Three controls on the grid toolbar work with Grid configurations: the **Grid config:** dropdown, the **Grid configuration editor** button and the **Clear grid configuration** button. The **Copy down:** switch next to them is not part of a Grid configuration.



The grid configuration controls on the grid toolbar.

1. Grid config: dropdown
2. Grid configuration editor
3. Clear grid configuration
4. Copy down: switch (not saved in a Grid configuration)

This page shows you how to:

- Switch a grid to one of your saved Grid configurations from the toolbar.
- Open the Grid configuration editor and change which columns are hidden, required, or set to copy down, as well as their order.
- Save your column layout as a named configuration, update it, apply it, and delete it.
- Return a grid to its default layout.
- Copy one user's saved configurations or filters to other users in the same county.

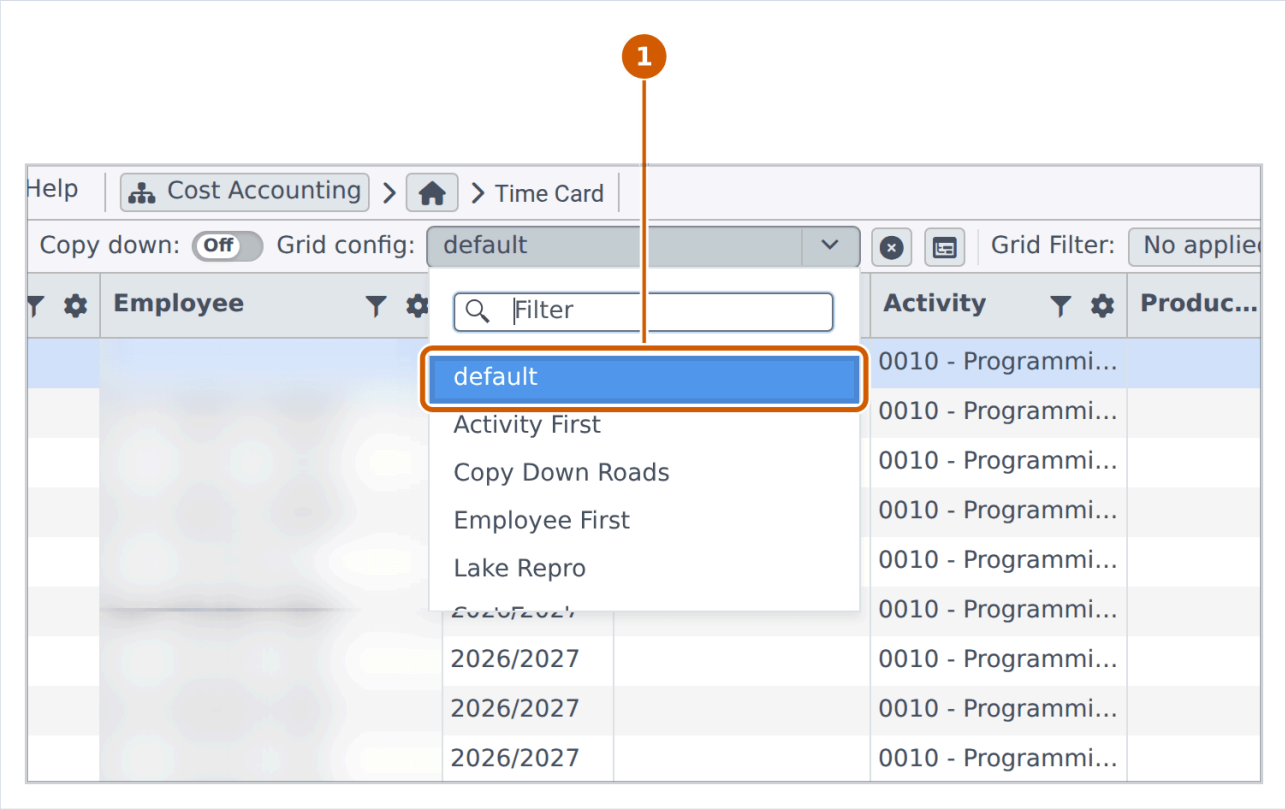
Before you begin

- Sign in to IRIS10.
- Open a screen with a data grid, such as Time Card.
- Make sure you know grid basics: columns, sorting, and the column menu. See Data grid overview and basics.
- To copy configurations to other users, you need access to the **Copy Grid Config** screen. Your administrator grants this access.

Procedure

Switch the grid to a saved configuration

1. On the grid's toolbar, find the **Grid config** label and click the dropdown next to it.
   A list opens, showing `default` first, followed by your saved configurations for this screen, plus a box with the placeholder `Filter`.



Open the 'Grid config:' dropdown and pick a configuration to apply it immediately.

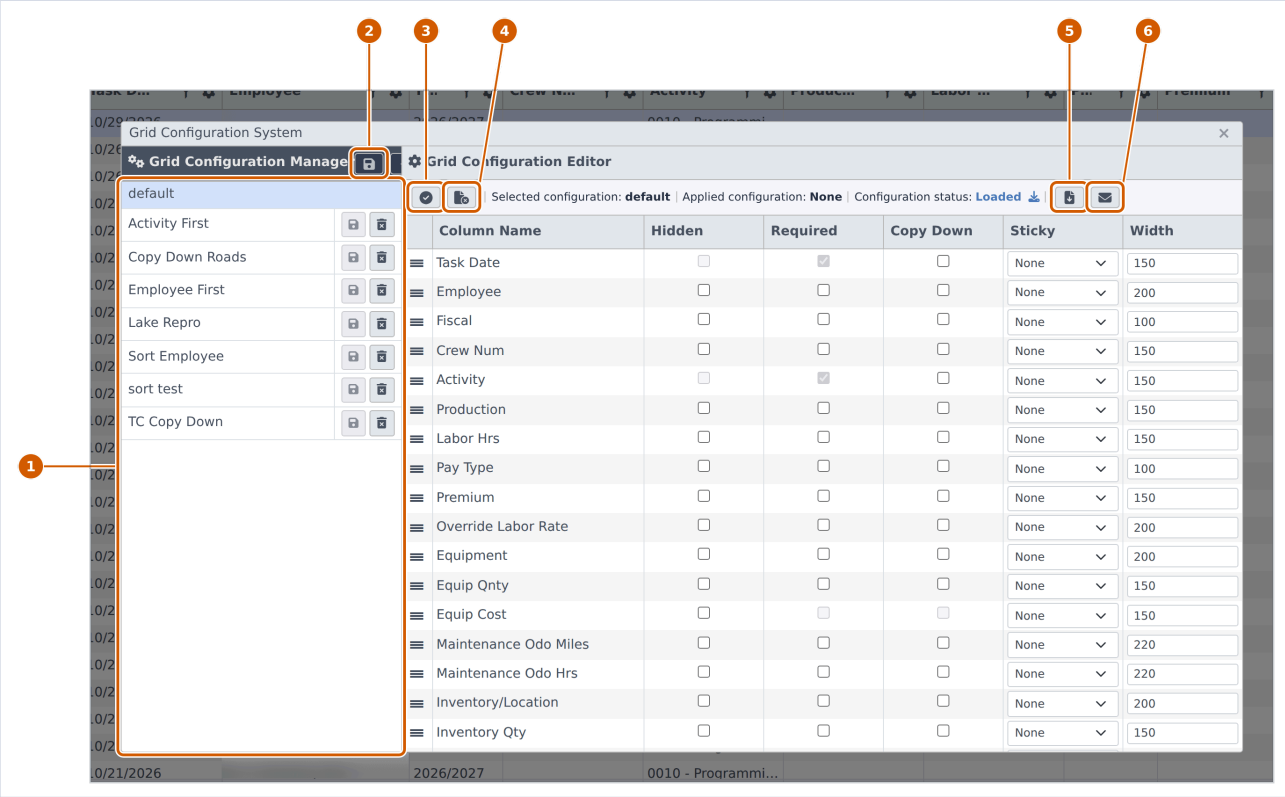
1. 'default' and your saved configurations
2. Optional: to narrow a long list, type part of the name into the **Filter** box.
3. Click the configuration you want. The configuration is applied to the grid.
4. If you have unsaved changes, IRIS10 asks, "Changing grid configs will discard unsaved changes. Would you like to save them now?" Click **Save** to keep them.

   The new configuration loads.
5. Alternatively, click **Discard** to drop the unsaved changes. The new configuration loads.

Open the Grid configuration editor

1. On the grid toolbar, click **Grid configuration editor**.

   The **Grid Configuration System** window opens. It lists `default` and your saved configurations for this screen, and shows a table of columns headed **Column Name**, **Hidden**, **Required**, **Copy Down**, **Sticky** and **Width**.



The Grid Configuration System window: your configurations on the left and column settings on the right.

1. Saved configurations
2. Save grid configuration
3. Apply grid configuration
4. Clear grid configuration
5. Export
6. Email to IRIS support

2. Check the status shown in the editor. It reads Loaded, Unsaved or Saved.

   When a configuration has unsaved changes, `(unsaved)` appears in red after its name.

3. On a screen that has a child grid, use the editor's parent/child toggle to pick which grid's columns you are editing.

   The column table switches to the selected grid. One saved configuration holds the settings for both grids.

Change column settings in the editor

1. Drag a column row up or down by its drag handle to change the column order.

   The status changes to **Unsaved**.

2. Check or clear **Hidden** to hide or show a column.

   Turning **Hidden** on also clears that column's **Copy Down** setting.

3. Check or clear **Required** to mark whether the column is required.

4. Check or clear **Copy Down** to choose whether the column's value is carried into new records when the **Copy down** switch is on.

Turning **Copy Down** on also un-hides the column.

> **Note:** You can't turn on **Copy Down** for read-only columns.

Save the current layout as a new named configuration

1. In the **Grid Configuration System** window, type a name for the configuration. The name must be unique on this screen, must not be empty and must not be `default`.
2. Click the "Save grid configuration" button.

   The new configuration appears in the list and in the toolbar's **Grid config** dropdown. If the name is empty, a duplicate or `default`, a message tells you to change it. See Messages you may see when managing configurations.

Update an existing configuration

1. In the editor list, select the configuration you want to change.
2. Change its column settings.

   The status changes to Unsaved.
3. Click the save button on that configuration's row. The button stays unavailable until there is something to save.

   The status changes to Saved. If the configuration was changed somewhere else after you opened it, the save is refused and you are asked to re-apply your changes to the latest version.

Apply a configuration from the editor

1. In the editor list, select the configuration.
2. Click the "Apply grid configuration" button.

   The window closes and the grid reloads with the configuration. Any unsaved edits are applied as a temporary `unsaved` layout and are not stored under a name.

Delete a configuration

1. In the editor list, click the delete button on the configuration's row.

   IRIS10 asks "Delete grid configuration?"

   > **Note:** The `default` row has no delete button.
2. Click **Yes** to delete the configuration.

   If you deleted the configuration that was applied, the toolbar dropdown switches back to `default`.
3. Alternatively, click **No** to keep the configuration.

Return the grid to its default layout

1. On the grid toolbar, click **Clear grid configuration**.

   The grid resets to the default configuration.
2. Alternatively, click the "Clear grid configuration." button in the editor.

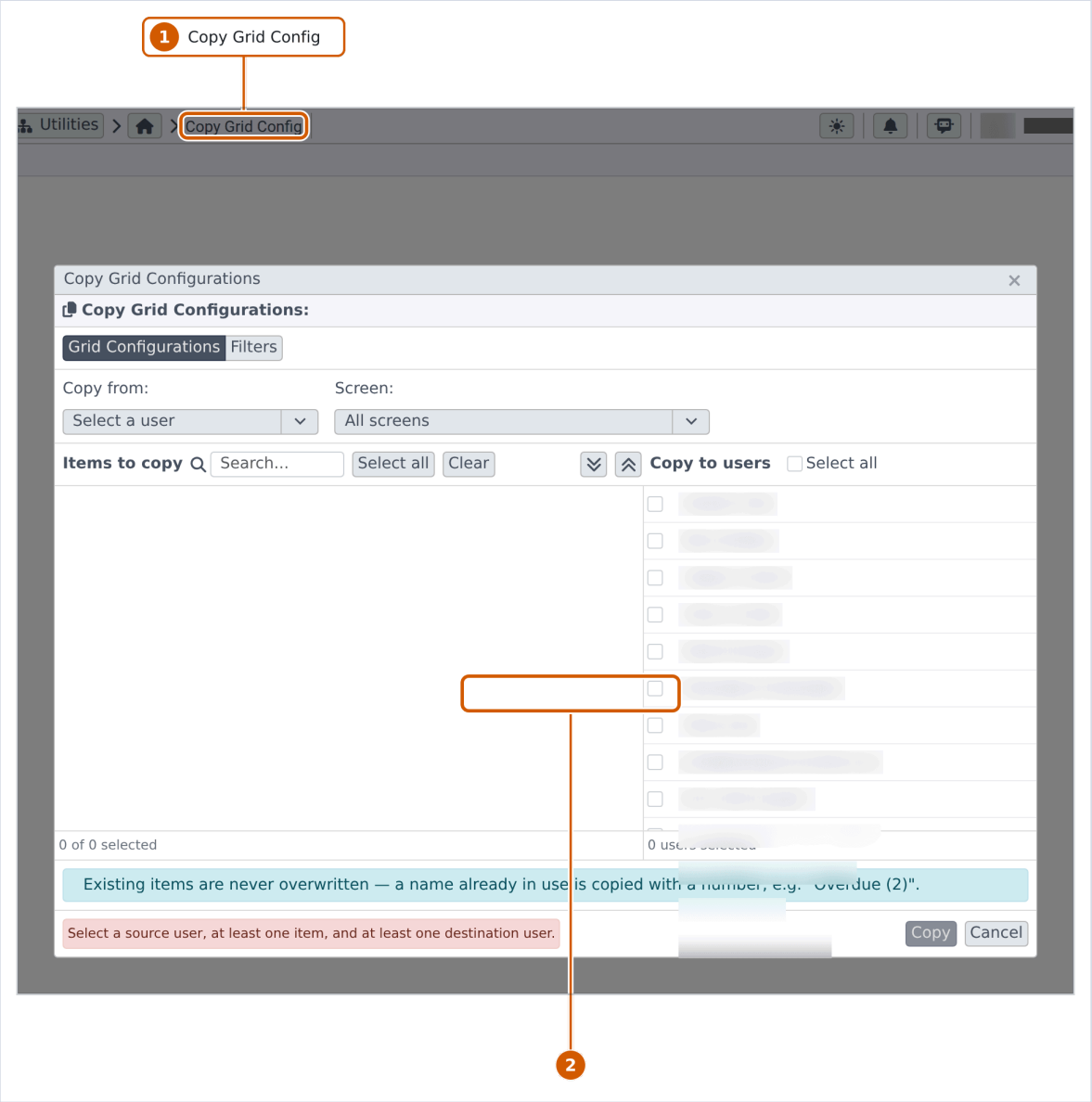
   The grid resets to the default configuration.

Copy saved configurations or filters to other users

1. Open the **Copy Grid Config** screen in the Utilities portal. See Navigating portals and pages.

   The screen header reads **Copy Grid Config**. The screen explains that it copies one user's saved grid layouts, or their saved grid filters, to other users in this county.

   > **Note:** Only users who have been given access to this screen can open it. Anyone else sees "You do not have access to Copy Grid Configurations." Ask your IRIS10 administrator if you need access.



The Copy Grid Config screen copies one user's saved layouts or filters to other users in the county.

1. Copy Grid Config
2. Copy Grid Configurations

2. Click **Copy Grid Configurations**.

   The copy window opens.

3. Choose the mode. **Grid Configurations** copies saved grid layouts, and **Filters** copies saved grid filters.

   In Filters mode the title changes to **Copy Grid Filters**. Your source and destination choices are kept when you switch modes.

4. In the source-user dropdown, choose the user whose items you want to copy.
5. In the screen dropdown, choose the screen the items belong to.
6. Select the items to copy, or click **Select all**. Click **Clear** to start the selection again.

> **Note:** Select at least one item. Otherwise the copy is refused.

7. In the **Copy to users** list, choose one or more destination users. They must be different from the source user.
8. Run the copy.

   The items are added to each destination user and become theirs. Nothing the destination users already have is overwritten. If a name was already in use, the copy is saved under a numbered name such as `Overdue (2)`, and a warning lists each `old -> new` name.

Reference

Grid configuration controls on the toolbar

ON-SCREEN LABEL	WHAT IT DOES
Grid config (dropdown)	Lists `default` and your saved configurations for this screen. Picking one applies it immediately.
Grid configuration editor	Opens the **Grid Configuration System** window (tooltip: "Click to open grid configuration editor.").
Clear grid configuration	Resets the grid to the default configuration (tooltip: "Click to clear grid configuration").

Buttons in the Grid Configuration System window

TOOLTIP	WHAT IT DOES
Save grid configuration	Saves the current column layout as a new named configuration.
Hide grid configuration manager	Hides the list of configurations.
(row) save	Saves changes to that configuration. Not shown on `default`
(row) delete	Deletes that configuration after you confirm. Not shown on `default`
Apply grid configuration	Closes the window and reloads the grid with the selected configuration
Clear grid configuration	Resets the grid to the default configuration.
Click to export the current grid configuration as a JSON file	Downloads the current configuration as a file
Click to email the grid configuration to IRIS support	Sends the configuration to IRIS support, for example when you report a problem

Column settings you can save in a configuration

SETTING	MEANING
Column order	The order of columns, set by dragging rows in the editor
Hidden	Hides the column. Turning it on clears Copy Down for that column
Required	Marks the column as required
Copy Down	The column's value is carried into new records when the **Copy down** switch is on. Turning it on un-hides the column. Not available for read-only columns
Sort	The saved sort order of columns

Messages you may see when managing configurations

MESSAGE	CAUSE	WHAT TO DO
Please give the grid configuration a unique name	You already have a configuration with that name on this screen	Choose a different name
Filter name must not be empty	You entered no name. The message says "filter," but it applies to Grid configurations.	Type a name
Cannot overwrite default filter	IRIS10 reserves the name `default` in any letter case.	Choose a different name
Changing grid configs will discard unsaved changes. Would you like to save them now?	You picked another configuration while you had unsaved changes	Click **Save** to keep the changes, or **Discard** to drop them
Delete grid configuration?	You clicked a row's delete button	Click **Yes** to delete, or **No** to keep it

Messages you may see when copying

MESSAGE	MEANING
You do not have access to Copy Grid Configurations	Your account has not been given access to this screen. Ask your administrator
Source and destination user must be different.	Choose a destination user other than the source user
Grid Configuration List must contain at least one configuration to copy	Select at least one item
Destination user is not a member of this tenant	You can only copy to users in the county you are signed in to
You can not affect a tenant you are not logged into	You can only copy within the county you are signed in to
No grid configurations were found for the source user in this tenant with that criteria to copy	None of the selected items belong to the source user. Nothing was copied

MESSAGE	MEANING
N of the M selected configurations were not copied because they do not belong to the source user in this tenant	Warning: some selected items were skipped. The rest were copied
These layouts were copied under a new name, because the destination user already had that name or because the name is reserved	Warning: the listed layouts were copied under new, numbered names, shown as `old -> new`

Tips and notes

Note: Grid configurations are personal and belong to one screen. Each user keeps their own list for each screen, and names must be unique within that list.

Important: A Grid configuration doesn't save filters or page size. Use the **Grid Filter** dropdown to save and reuse filters. See Grid filters.

Note: The **Copy down:** on/off switch on the toolbar is not part of a Grid configuration. IRIS10 keeps it for your current session only, and it starts in the off position for each new session. The per-column **Copy Down** setting is part of the Grid configuration.

Note: `default` is a built-in entry. You can't save over it, rename it, or delete it, and you can't give a configuration that name.

Tip: On screens with a child grid, one named configuration saves both the parent and child column settings. Use the editor's parent/child toggle to switch between them.

Tip: Copying never overwrites anything the destination user already has. An exisiting name gets a number added, such as `Overdue (2)`. In Filters mode, a copied filter is never set as the destination user's default filter.

Note: Copied layouts belong to the destination user, who can change or delete them like their own.

Related topics

- Data grid overview and basics
- Grid filters
- Grid viewing and editing
- Navigating portals and pages

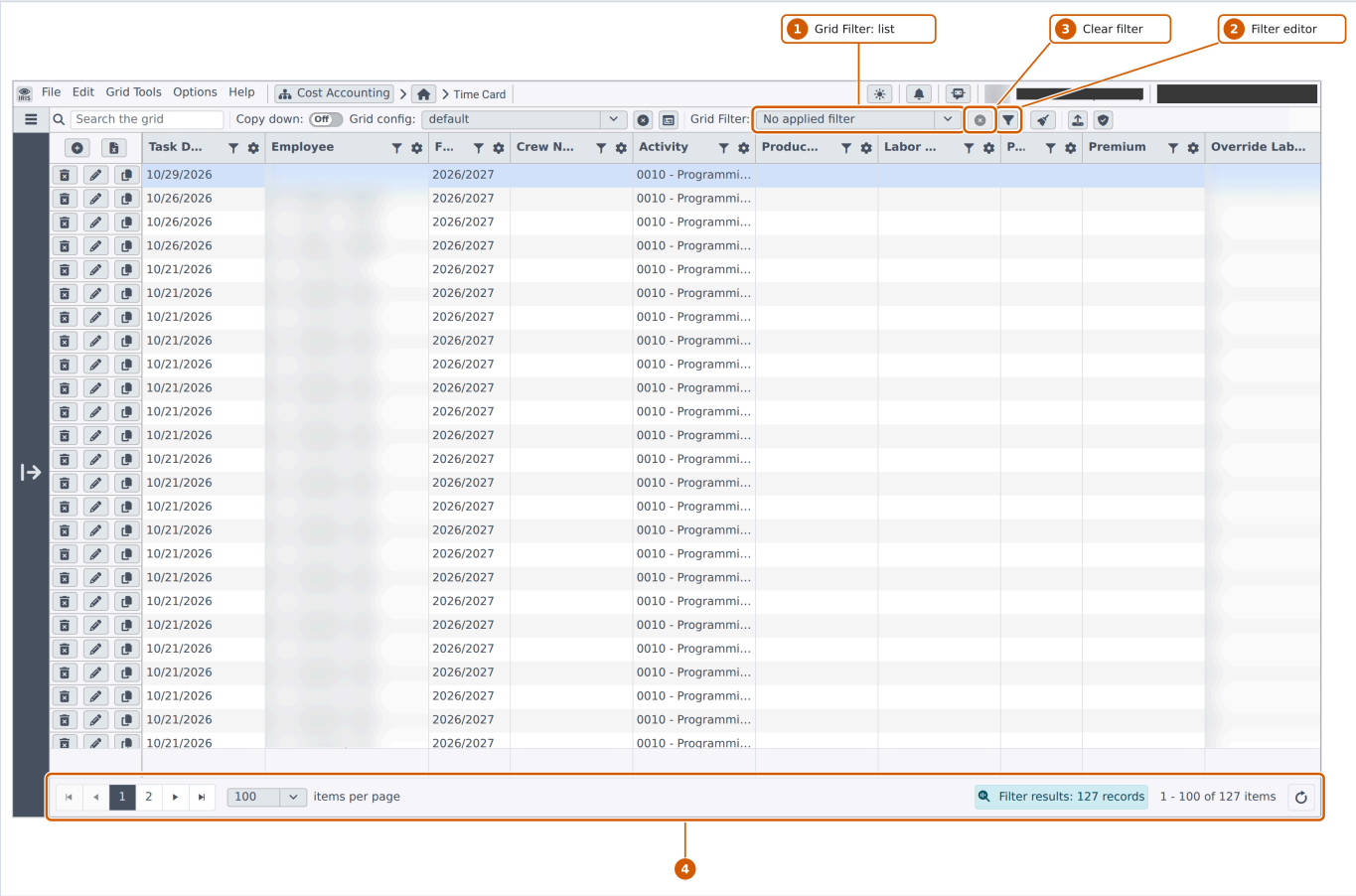
Grid filters

Overview

You can narrow a grid to the records you need in three ways:

- Choose a saved filter from the **Grid Filter** list on the grid toolbar.
- Filter on one column from its column header.
- Build a multi-condition filter in the filter editor window, check it and apply it.

The examples on this page use the Time Card grid. The grid toolbar has the **Grid Filter** list, the **Filter editor** button, and the **Clear filter** button. The pager shows **Filter results** with the number of records the current filter returned.



Filter controls on the grid toolbar and the filter result count in the pager.

1. **Grid Filter list**
2. **Filter editor**
3. **Clear filter**
4. **Filter results count**

Before you begin

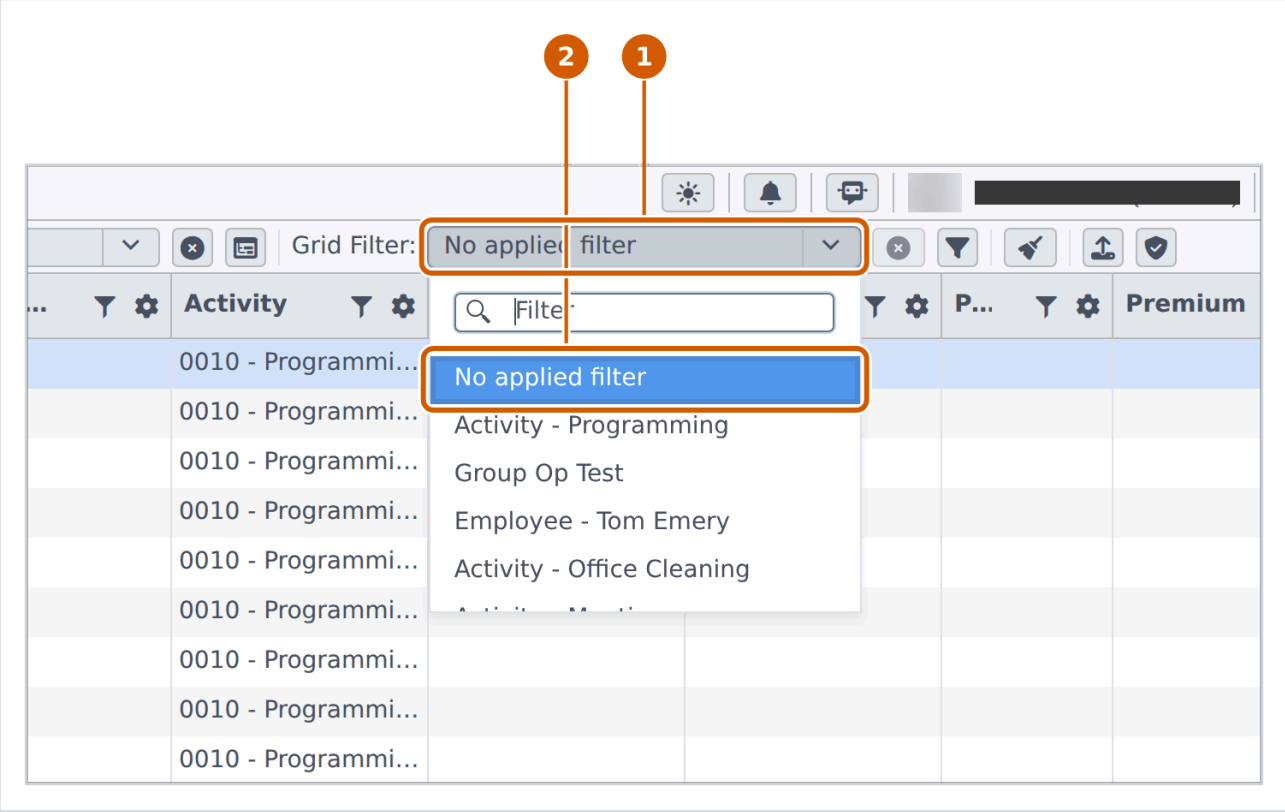
- Sign in to IRIS10.
- Know the shared data grid: columns, paging, search and sorting. See Data grid overview and basics.

Procedure

Apply a saved filter

1. On the grid toolbar, next to **Grid Filter**, click the filter list.

   The list opens with a **Filter** search box at the top, **No applied filter** as the first item, then your saved filters.



The Grid Filter: list, with a search box, No applied filter and your saved filters.

   1. **Filter search box**
   2. **No applied filter and saved filters**

2. (Optional) Type part of a filter name in the **Filter** box.

   The list shortens.

3. Click the name of the filter you want.

   The grid reloads with the filter applied. IRIS10 remembers this choice and applies the same filter the next time you open this screen.

Clear the applied filter

1. On the grid toolbar, click **Clear filter** (tooltip "Click to clear applied grid filter").

   The grid removes the filter, and the screen no longer opens with your previously chosen saved filter.

   > **Note:** On Time Card, **Clear filter** can be greyed out and unavailable.

   To clear the filter from the list instead, use steps 2 and 3.
2. Open the **Grid Filter:** list.

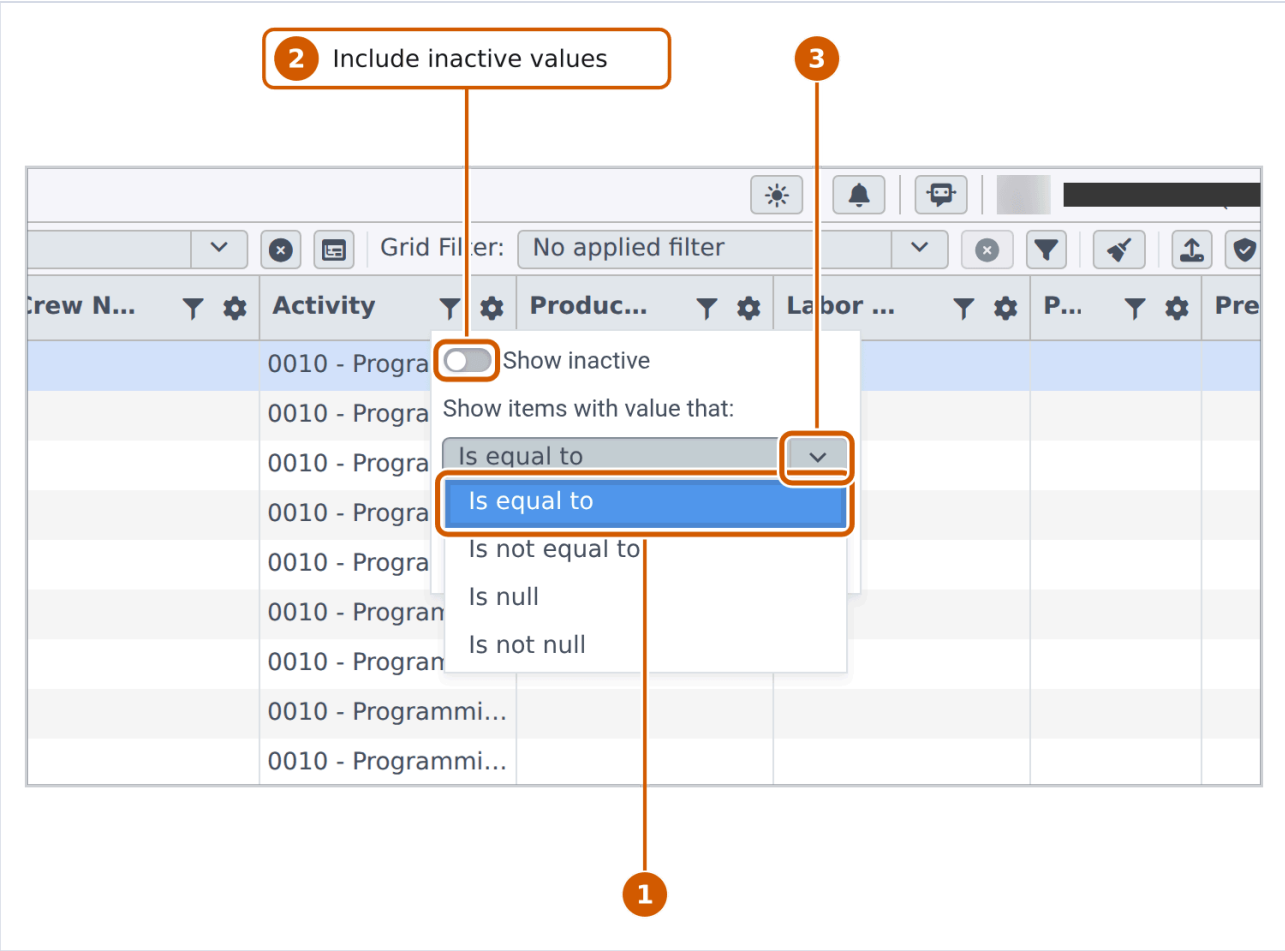
   The list opens.
3. Click **No applied filter**.

   The grid clears the filter.

Filter on one column from its header

1. In the column header, click the filter icon for the column you want to filter (for example, **Activity**).

   A filter menu opens with the text "Show items with value that", an operator list, a value list, and **Filter**, and **Clear** buttons.



Column filter menu for Activity with the operator list open.

1. **Operators**
2. **Include inactive values**
3. **Filter and Clear**

2. Open the **Operator** list.

   The list shows the operators for the column.

3. Choose an operator, such as **Is equal to**, **Is not equal to**, **Is null**, or **Is not null**.

   The menu selects the operator. The operators offered depend on the column. The **Activity** column offers **Is equal to**, **Is not equal to**, **Is null**, and **Is not null**.

4. To include inactive values in the value list, turn on the switch with tooltip "Include inactive values in this list."

   The value list includes inactive values. The switch is off by default.

5. Choose the value to filter on.
6. Click **Filter**.

   The grid shows only rows matching the condition.

7. To remove the column filter, open the menu again.

   The filter menu opens.

8. Click **Clear**.

The column filter is removed.

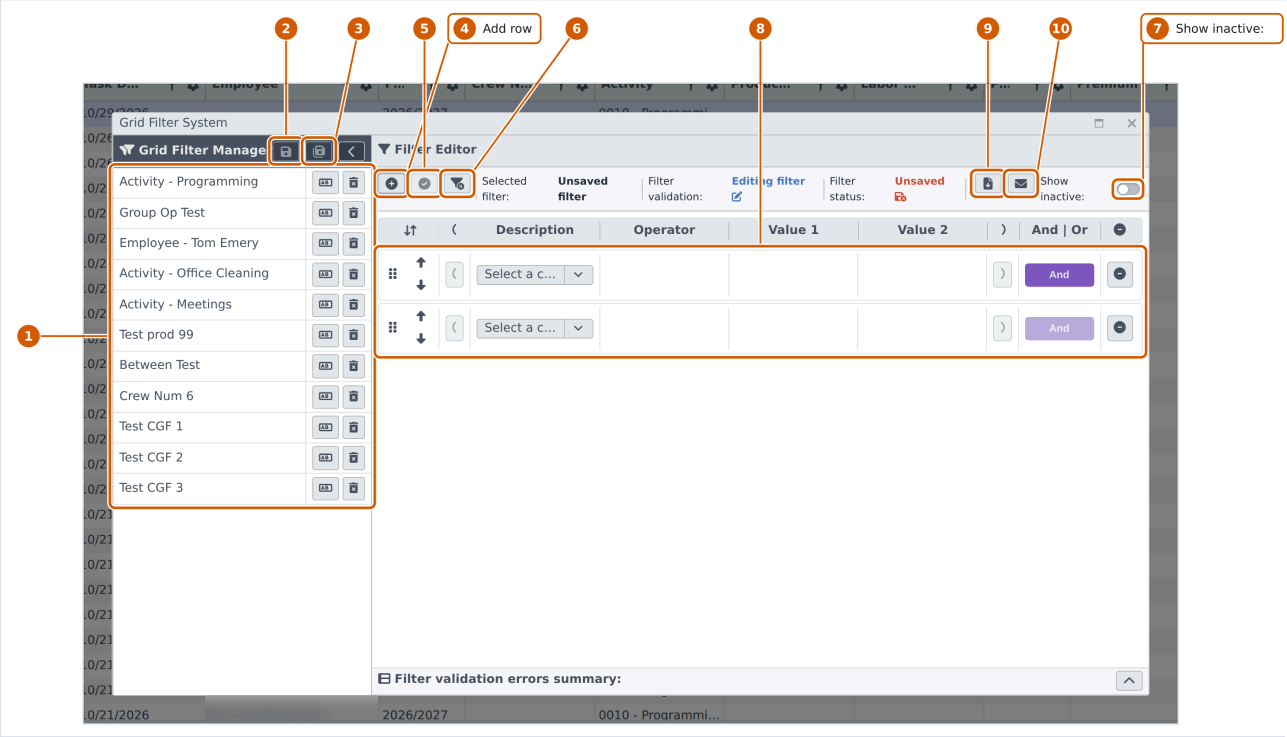
Build and apply a filter in the filter editor

1. On the grid toolbar, click **Filter editor** (tooltip "Click to open grid filter editor").

   A window opens with your saved filters listed on the left and the **Filter editor** on the right.
2. If the screen has a child grid, under **Target grid**, click **Parent** or **Child** to choose which grid you are filtering.

   > **Note: Target grid:** appears only on screens with a child grid.
3. Click the add row button (tooltip "Click to add a filter row").

   A new condition row appears showing "Select a column..." An empty editor shows "Filter empty. Add a row to get started."



The filter editor window: your saved filters on the left, a new condition row in the editor on the right.

1. **Your saved filters**
2. **Save**
3. **Save As**
4. **Add row**
5. **Apply**
6. **Clear**
7. **Show inactive**
8. **Condition row**
9. **Export**
10. **Email to IRIS support**

4. In the **Description** column of the row, select the grid column to filter on.
5. In the **Operator** column, choose the comparison.
6. Enter **Value 1**.

   When you apply the filter, the grid ignores a row that has an operator but no value (other than `IS NULL` or `IS NOT NULL`).
7. For a **Between** comparison, enter **Value 2**.

   When you apply the filter, the grid ignores a **Between** row that is missing a value.
8. To include inactive values in the value lists, turn on **Show inactive:**.

   Inactive values appear in the editor's value lists. The switch is off by default.
9. To add another condition, click the add row button again.

   A new condition row appears.
10. In the **And | Or** column of the earlier row, choose **And** or **Or**.

    If you leave **And | Or** blank, IRIS10 uses And.
11. To group conditions, set an open parenthesis on the first row of the group.
12. Set a close parenthesis on the last row of the group.

    Every open parenthesis needs a matching close parenthesis. Otherwise, validation reports the groups as unbalanced.
13. To remove a condition, click the delete button at the end of its row.

    The editor removes the row.
14. Check the **Filter validation:** indicator and the validation results panel.

    The panel shows "Good news. No filter validation errors found" when the filter is valid. An OR-grouping warning still lets the filter apply. You must fix an unbalanced-group error first.
15. Click the apply button (tooltip "Click to apply the current filter.").

    The grid shows only matching rows. The pager shows the count after **Filter results:**. If you apply an empty filter, the grid clears its filter.
16. To start over, click the clear button (tooltip "Click to clear the current filter").

    The editor clears its filter.

Save a new filter

1. Build the filter in the **Filter editor** as described in "Build and apply a filter in the filter editor."
2. Click **Save As** (tooltip "Click to save a copy of the current filter").

   A window asks you to "Enter the name of your filter."
3. Type a name.
4. Confirm the name.

   The filter appears in your saved filter list.

   > **Note:** The name cannot be blank, cannot be `Default` in any letter case, and must differ from your other filter names on this screen, ignoring letter case.

Change a saved filter

1. In the filter editor window, click the saved filter in the left-hand list.

   Its conditions load into the **Filter editor** and **Selected filter:** shows its name. The list contains only filters you created for this screen.
2. Change the conditions.
3. Click **Save** (tooltip "Click to save the current filter").

   IRIS10 replaces the saved filter's conditions with the ones now in the editor.

Rename a saved filter

1. In the filter editor window, click the rename button on the filter's row in the list.

   If the filter has unsaved edits, the prompt "Save current edited filter?" appears with **Save** and **Cancel**.
2. Type the new name.
3. Confirm the name.

   A blank name shows "Filter name must not be empty."

Delete a saved filter

1. In the filter editor window, click the delete button on the filter's row in the list.

   IRIS10 removes the filter and all its conditions. If this screen was set to open with that filter, it no longer does.

Export or send a filter to IRIS support

1. In the filter editor window, click the export button.

   IRIS10 downloads the current filter as a file.
2. Alternatively, click the email button (tooltip "Click to email the filter to IRIS support").

   IRIS10 sends the filter to IRIS support.

Reference

Grid toolbar filter controls

CONTROL	WHAT IT DOES
Grid Filter: list	Shows saved filters for this screen. Includes a **Filter** search box and **No applied filter** as the first item.
Filter editor	Opens the filter editor window (tooltip "Click to open grid filter editor").
Clear filter	Clears the applied grid filter (tooltip "Click to clear applied grid filter").
Filter results: (in pager)	Shows how many records the current filter returned.

Filter editor buttons and indicators

CONTROL (TOOLTIP)	PURPOSE
Save ("Click to save the current filter")	Saves changes to the selected saved filter.
Save As ("Click to save a copy of the current filter")	Saves the current filter under a new name.
Hide filter manager ("Click to hide filter manager")	Hides the saved filter list.
Rename / Delete (per saved filter)	Renames or deletes that saved filter.
Add row ("Click to add a filter row")	Adds a condition row.
Apply ("Click to apply the current filter")	Applies the editor's filter to the grid.
Clear ("Click to clear the current filter")	Clears the editor's filter.
Export	Downloads the current filter as a file.
Email ("Click to email the filter to IRIS support")	Sends the filter to IRIS support.
Show inactive: ("Include inactive values in the filter value lists.")	Adds inactive values to the value lists
Target grid: Parent / **Child**	Chooses which grid to filter; shown only on screens with a child grid.
Selected filter / **Filter validation** / **Filter status**	Show the loaded filter, validation result and status.

Filter editor row columns

COLUMN	USE
Open parenthesis	Starts a group of conditions.
Description	Grid column to filter on ("Select a column...").
Operator	Comparison to use.
Value 1	Value to compare against.
Value 2	Second value, used by **Between**.
Close parenthesis	Ends a group of conditions.
And \Or	How this row joins the next row; blank means **And**.
Delete	Removes the row.

Which filter a screen opens with (highest first)

ORDER	SOURCE
1	A screen link you followed. Applies to that visit only and does not change your saved filter.
2	The filter already in use when you return to a screen during your session.
3	The saved filter you last chose from the **Grid Filter:** list.
4	The screen's built-in default filter, if it has one.

ORDER	SOURCE
5	No filter

Built-in screen default filters

DEFAULT FILTER	APPLIES TO	SHOWS
Active + Active Road	Screens with both an Active and an Active Road column	Active records on active roads
Active	Screens with an Active column	Active records
Last 2 Years	Transaction screens with a task date; inventory transaction screens on inventory date	Records from the last two years (keeps large screens fast)
Unposted	Inventory Transfer	Transfers not yet posted
Not Posted to Timecard	Fuel Import Stage	Fuel records not yet posted to time cards
Active Road / Active Location / Active Employee	Screens with those columns	Active roads, locations or employees
Active Equipment	Edit Last PM list	Active equipment
Open Payments	Payment screens	Payments that are not complete, canceled or deleted

Filter messages

MESSAGE	MEANING / WHAT TO DO
`Filter empty. Add a row to get started.`	The editor has no rows; click the add row button.
`Good news. No filter validation errors found.`	The filter is valid.
`One or more group operators are unbalanced. Please correct them to validate the filter.`	Match every open parenthesis with a close parenthesis.
`Filter name must not be empty.`	Type a name before saving.
`Can not create a user filter with the name "Default".`	Choose a different name.
`No Custom Filters Available` / `You have no saved custom filters. Begin by creating a custom filter.`	You have no saved filters for this screen yet.
`Filter cleared and applied.`	An empty filter was applied, so the grid is unfiltered.
`The screen link filter was not applied. The link has expired. Open it again from the screen that made it.`	Go back to the original screen and open the link again.

MESSAGE	MEANING / WHAT TO DO
`The screen link has no filter.` / `The screen link has more than 10 rows.` / `The screen link name is longer than 60 characters.` / `The screen link has a group that it does not close.`	The link was rejected; the screen opens without that filter.
`You do not have access to Copy Grid Configurations.`	Ask your administrator for access to copy filters to other users.
`Source and destination user must be different.` / `Destination user is not a member of this tenant.`	Pick a different destination user when copying filters.
`These filters were copied under a new name, because the destination user already had that name or because the name is reserved: ...`	The listed copied filters were renamed for the destination user.

Screen link limits

A Screen link is a link from another screen that opens this grid with a filter already applied, for that visit only.

RULE	LIMIT
Rows	Up to 10
Name	Up to 60 characters; default name `Screen link`
Operators	`=`, `<>`, `>`, `>=`, `<`, `<=`, `Between`, `Contains`, `Not Contains`, `Starts With`, `Ends With`, `Not Starts With`, `Not Ends With`, `IS NULL`, `IS NOT NULL`
Values	Cannot contain `"`, `[`, `]`, `(`, `)` or `;`; dates as `MM/dd/yyyy` or `yyyy-MM-dd`; `Between` needs Value 2; `IS NULL` takes no value
Grouping	At most one parenthesis per row; groups must be closed

Tips and notes

> **Important:** Clicking **Clear filter** also stops the screen from reopening with your chosen saved filter. Choose a saved filter again to make it your screen's filter.

> **Note:** Saved filters are personal. Each user's list shows only the filters that user created for that screen, and filters are kept separate for each organisation you sign in to.

> **Note:** Saved filters are separate from grid configurations. Saving a filter does not save column layout, and choosing a grid configuration does not change your filter. See Grid configurations.

> **Tip:** A filter you saved earlier takes priority over the screen's built-in default.

Tip: Rows with an operator but no value (except `IS NULL` / `IS NOT NULL`) and **Between** rows missing a value are skipped without a warning. If your results look too broad, check that every row has its values.

Note: A warning about OR grouping does not block the filter; it still applies. Check that the results are what you expect.

Note: IRIS10 sets built-in screen defaults from the screen's columns. You cannot rename, delete, or modify them.

Note: Following a screen link applies its filter for that visit only; your saved filter for the screen does not change.

Tip: If IRIS support asks for your filter, use the email button in the filter editor, or export the filter as a file.

Related topics

- Data grid overview and basics
- Grid configurations
- Grid viewing and editing