IRIS 10 — Shared features

User manual

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Lookup values

Overview

Lookup values are the entries that IRIS10 offers in pick lists on other screens, such as departments, inventory locations or zones. Each value has a Name and a Description. Some values are system data supplied with IRIS10.

On the Lookup Values screen, you choose a lookup table, view its values, see where the table is used, and add, duplicate, edit or delete values. In the Cost Accounting portal, you can also open lookup values in a window from the Inventory, RBF and Activity screens.

Before you begin

- Sign in to IRIS10.
- Know how to switch portals and open drawer menu items. See Navigating portals and pages.
- Know how to use the shared data grid. See Data grid overview and basics.
- To add, edit, duplicate or export values, you need access level 2 - Read/Write or higher on the screen. Deleting needs a higher level. See Security Administration: access levels by user.

Procedure

Open the Lookup Values screen

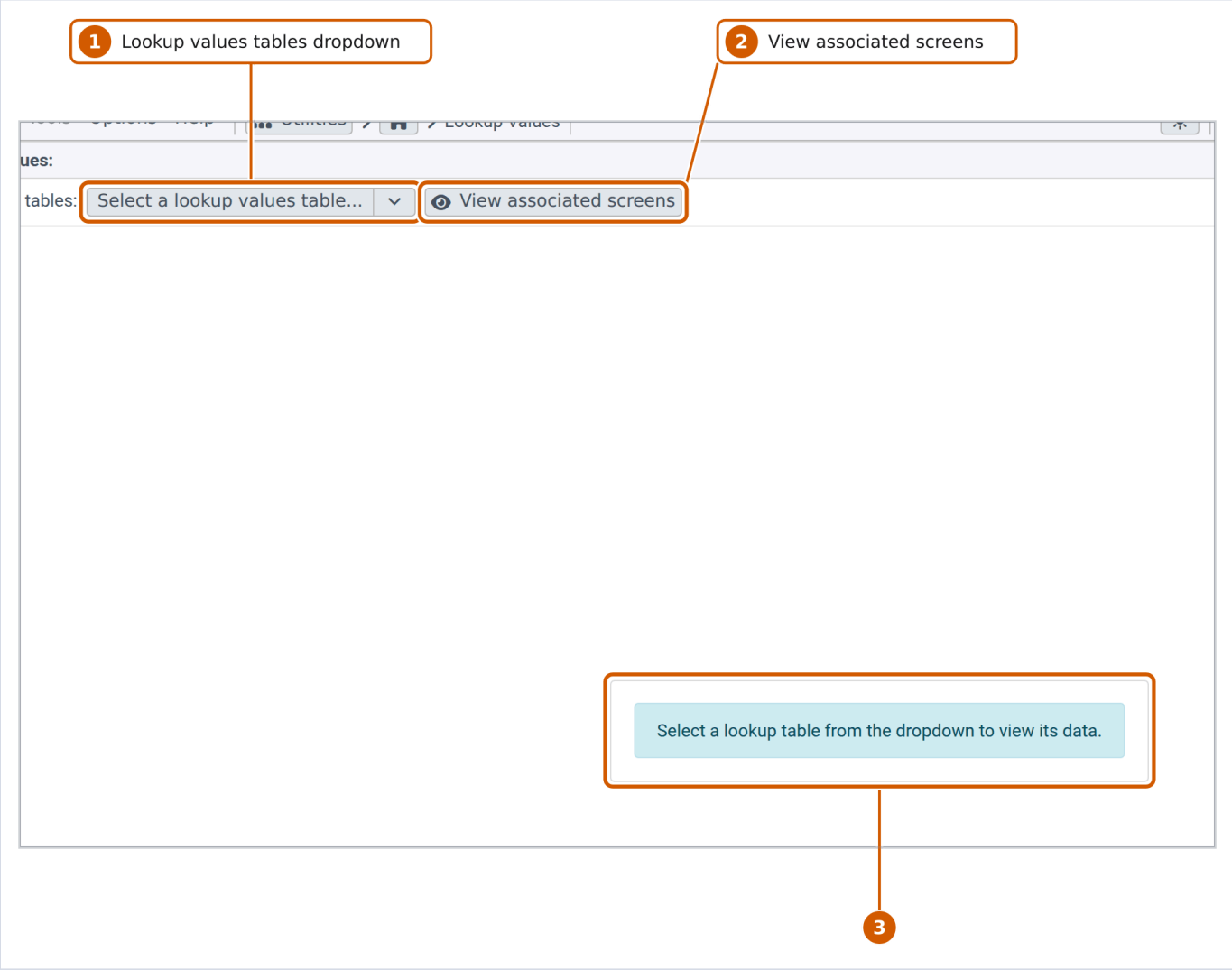
1. Open the screen from the portal you are working in:

PORTAL	MENU PATH IN THE DRAWER MENU	WHAT OPENS
Utilities	**Lookup Values Screens** > **Lookup Values**	The Lookup Values screen. The dropdown lists every lookup table.
Cost Accounting	**Utilities** > **Lookup Values**	The Lookup Values screen, listing only Cost Accounting tables.
Accounts Payable	**Accounts Payable Utilities** > **Lookup Values**	The Lookup Values screen, listing only Accounts Payable tables.
Equipment Maintenance	**EMS Utilities** > **Lookup Values**	The Lookup Values screen, listing only Equipment Maintenance tables.
Road Inventory	**RIS Utilities** > **Lookup Values**	The Lookup Values screen, listing only road inventory tables.

PORTAL	MENU PATH IN THE DRAWER MENU	WHAT OPENS
Service Requests	**SRS Utilities** > **Lookup Values**	The Lookup Values screen, listing only Service Requests tables (Contact Method, Priority, Response Method).
Vegetation Management	**Lookup Values** group; choose the list you need	The chosen list opens as its own screen, not the shared Lookup Values screen.

On the Lookup Values screen, the header shows **Lookup Values** and the message "Select a lookup table from the dropdown to view its data." shows.

> **Tip:** Use the Utilities portal when you need tables from more than one module.



The Lookup Values screen in the Utilities portal before you choose a table.

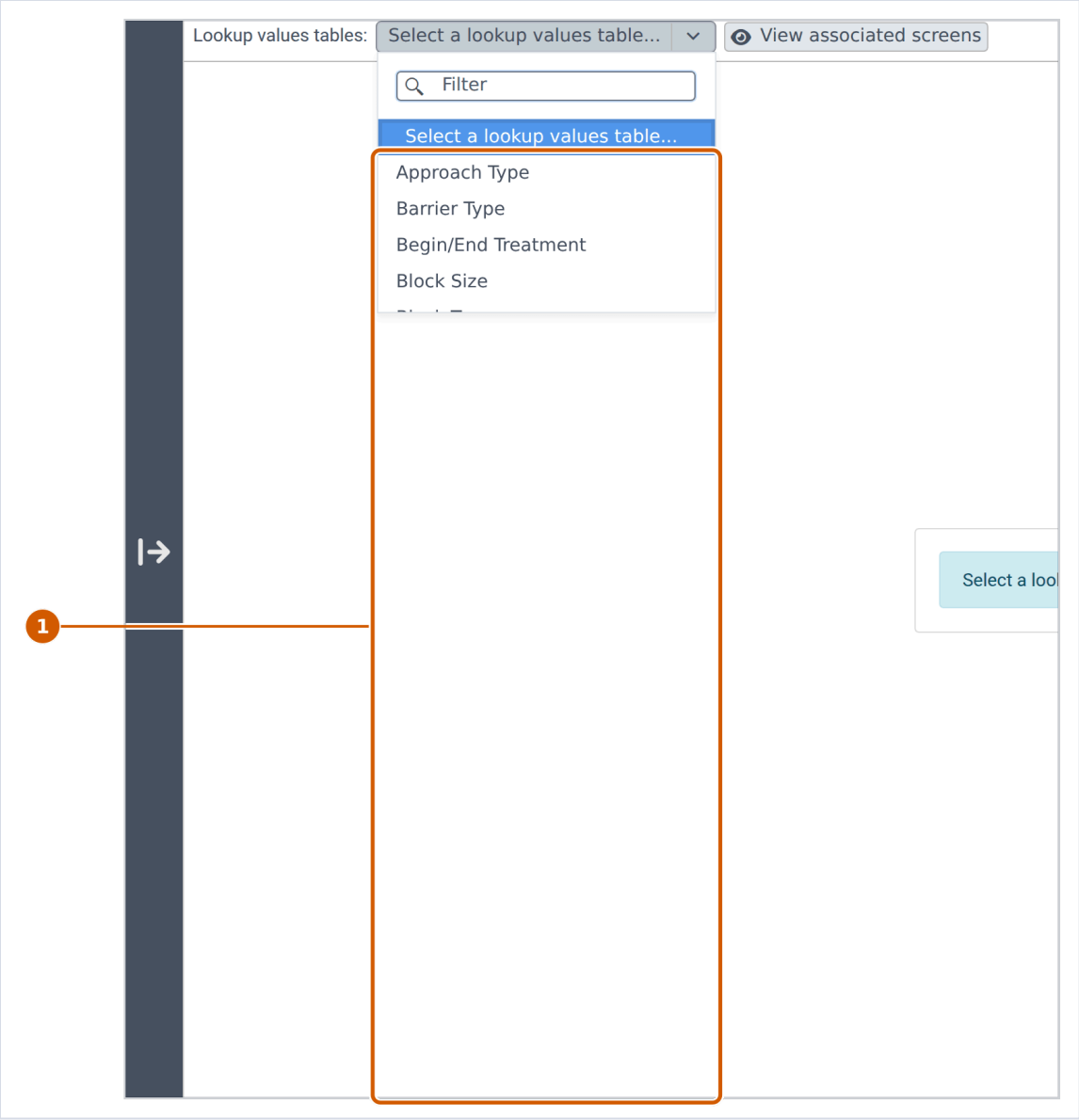
1. Lookup values tables dropdown
2. View associated screens
3. Shown until a table is chosen

Choose a lookup table and view its values

1. On the Lookup Values screen, click the **Lookup values tables** dropdown (placeholder "Select a lookup values table...").

   The list of lookup tables for the current portal opens in alphabetical order.

   > **Note:** Utilities lists every lookup table. Other portals list only the tables assigned to them.

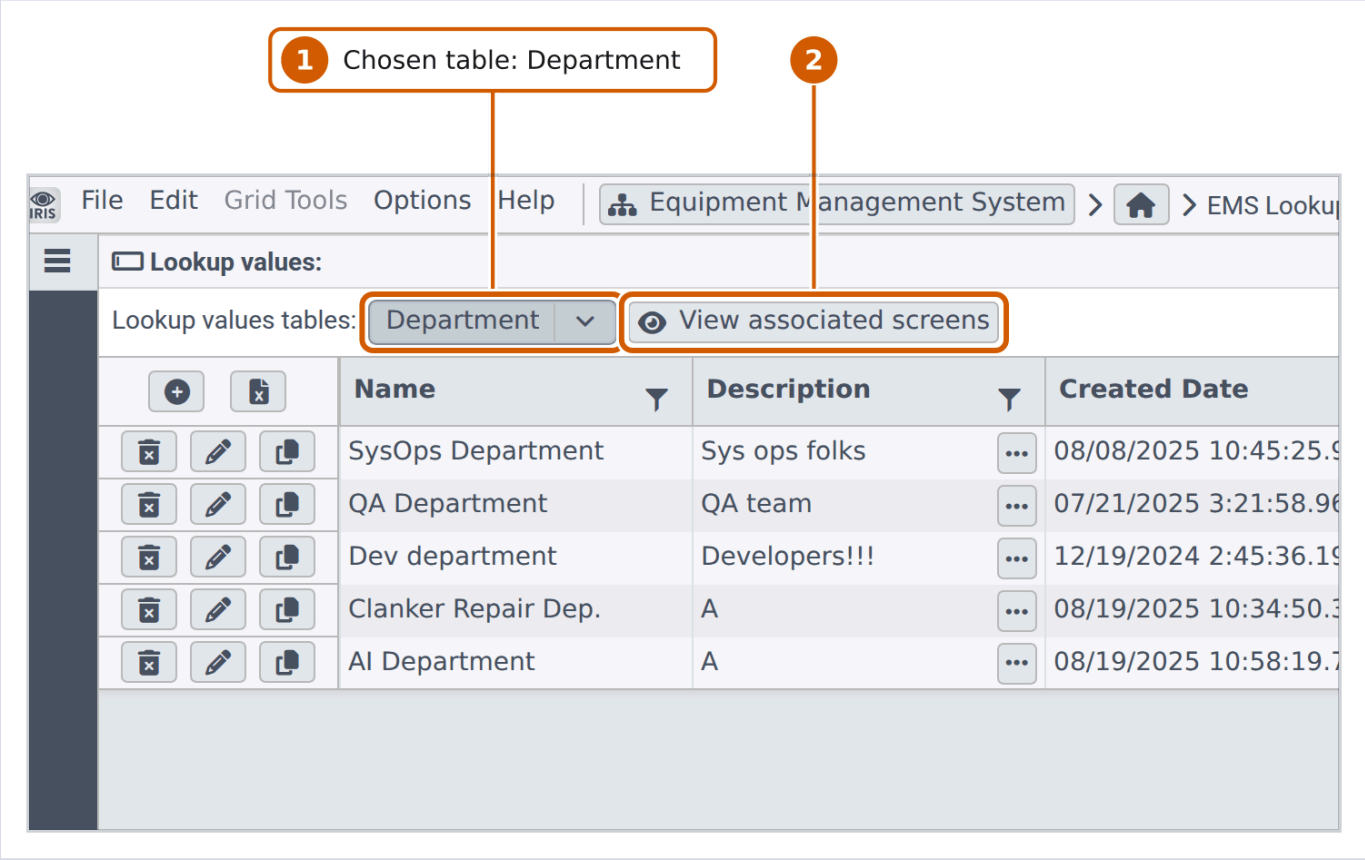


In Utilities, the dropdown lists every lookup table in alphabetical order.

1. Every lookup table
2. Optional: Type part of a table name.

   The list shows only tables whose names contain what you typed.
3. Click a table name, for example **Department**.

The message is replaced by a grid of that table's values. Choosing a table only displays data and changes nothing.



Department chosen in Equipment Maintenance. The grid lists its values.

1. Chosen table: Department
2. See where this table is used

4. Use the grid controls to sort, filter from the column menus, resize or reorder columns, or change the page size at the bottom. See Grid filters.

   The grid updates. If the table has no values, the grid shows "The result contained no records".

5. To start over, clear the dropdown back to its placeholder.

   The grid empties and the message "Select a lookup table from the dropdown to view its data." shows again.

See where a lookup table is used

1. Choose a table in the **Lookup values tables** dropdown.

   The table's grid is displayed.

2. Click **View associated screens** (tooltip "Click to view the screens associated to the current lookup table.").

A draggable **View Associated Screens** window opens, with a card headed "Lookup value:" followed by the table name. The card lists the names of the tables linked to this lookup table.

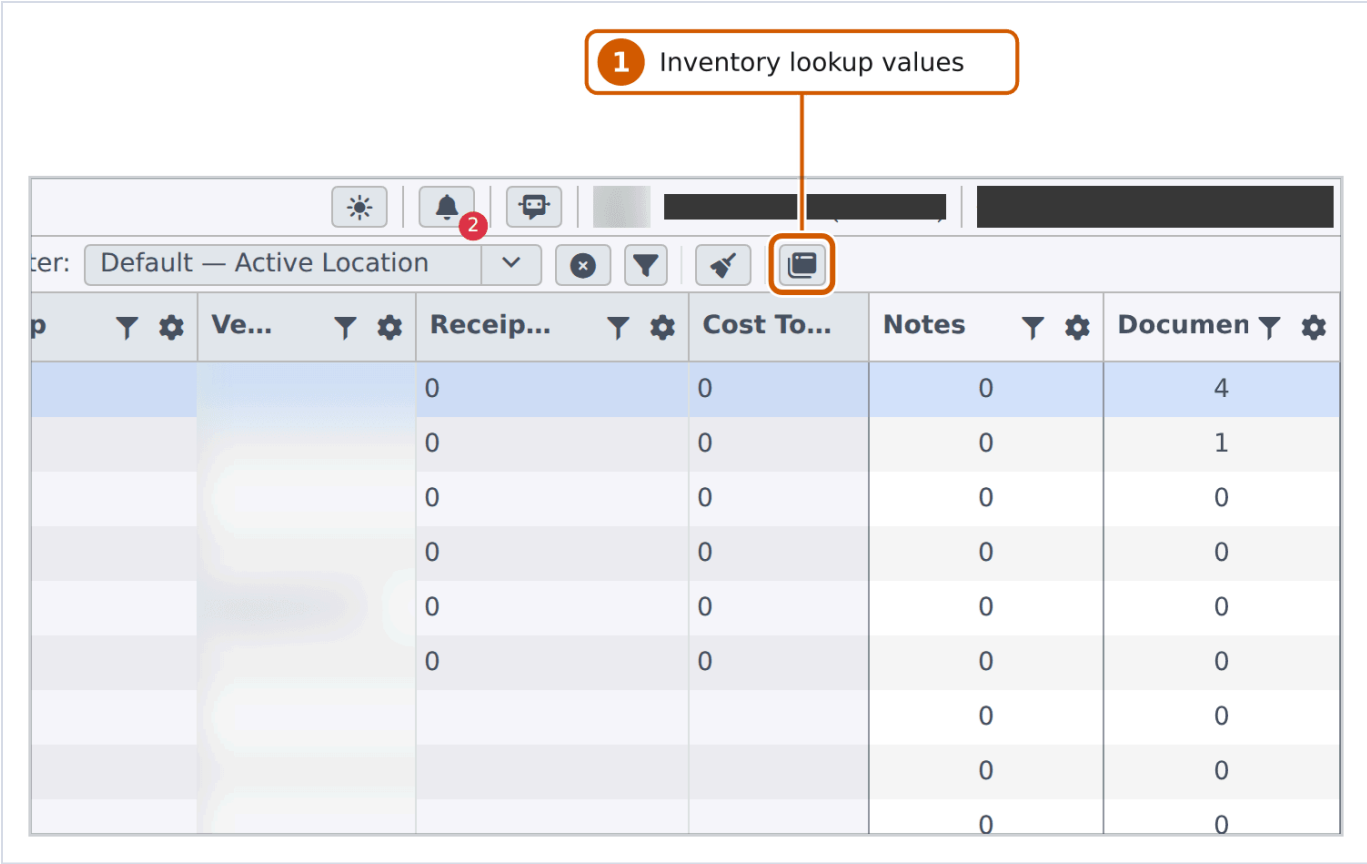
> **Note:** If no table is chosen, the message "Please select a valid lookup table." appears instead.

Open lookup values from a Cost Accounting screen

1. Open the window from the Cost Accounting screen you are working in:

SCREEN	TOOLBAR BUTTON	WHAT OPENS
Inventory	**Inventory lookup values** (tooltip "Open the inventory lookup values dialog."). You can also choose **Options** > **Inventory Lookup Values** from the main menu.	The **Inventory Lookup Values** window. Its **Lookup Values:** dropdown lists Inventory Category and Inventory Location. The first table is selected automatically and its grid shows.
RBF	**RBF lookup values** (tooltip "Open the road/bridge/facility lookup values dialog.")	The **Road/Bridge Facilities Lookup Values** window with Bridge/Facility Type selected and its grid shown.
Activity	**Actvity lookup values** (spelled as on screen; tooltip "Open the activity lookup values dialog.")	The **Activity Lookup Values** window with Workers Comp Codes selected and its grid shown.

> **Note:** The window offers only the tables that belong to the screen you opened it from.



On the Cost Accounting Inventory screen, Inventory lookup values opens the Inventory Lookup Values window.

1. Inventory lookup values
2. To switch tables in a window that offers more than one, choose another table in the **Lookup Values:** dropdown.

   The grid changes to the chosen table.

Add a lookup value

1. Choose the table in the **Lookup values tables** dropdown.

   The table's grid is displayed.
2. Click **Add new record** (the plus button in the grid header; keyboard shortcut Ctrl+Shift+A).

   A new editable row appears at the top of the grid.

   > **Note:** The button appears only for users with 2 - Read/Write or higher on the screen who also meet the table's add level.
3. Type the Name. Name is required, and its maximum length depends on the table.

   If you leave Name empty, the grid shows a required-field message such as "Your Name is required."
4. Optional: Type a Description.
5. Click the checkmark on the row.

The row is saved. New values are saved with Is System Data set to false. The screen has no separate Save button.

> **Note:** You cannot set Is System Data.

Duplicate a lookup value

1. On the row you want to copy, click **Duplicate record**.
   A new editable row is created from the selected row.

   > **Note:** The button appears only when your access level meets the table's add level.
2. Change the Name and any other fields.
3. Click the checkmark to save.
   The new value is saved.

Edit a lookup value

1. On the row, click **Edit record** (the pencil button; keyboard shortcut Ctrl+Shift+E).
   The row becomes editable in the grid. The Is System Data cell keeps its value and cannot be edited.

   > **Note:** This button requires 2 - Read/Write or higher.
2. Change the Name or Description.
3. Click the checkmark to save.
   The change is saved. Two messages can appear instead:
   - If the row is marked Is System Data, the save is refused with "Not authorized to affect system data."
   - If someone else changed the row after you loaded it, you see "Record has been modified by someone else since being queried from the database, refresh and try your update again". Refresh the grid and make your change again.

> **Note:** System data rows cannot be changed at any access level.

Delete a lookup value

1. On the row, click **Delete record** (the trash button).
   IRIS10 asks you to confirm the delete.

   > **Note:** The button appears only for users with an access level above 2 - Read/Write, on tables that allow deleting.
2. Confirm the delete.
   The value is removed permanently, together with its comments and documents. The delete is recorded in audit history. If the row is marked Is System Data, the delete is refused with

"Record List contains System Data which cannot be deleted."

> **Note:** System data rows cannot be deleted at any access level.

Reference

Where to find lookup values in each portal

PORTAL	HOW TO OPEN	TABLES LISTED
Utilities	**Lookup Values Screens** > **Lookup Values**	Every lookup table
Cost Accounting	**Utilities** > **Lookup Values**	Cost Accounting tables (for example Bridge/Facility Type, Department, Inventory Category, Inventory Location, Program, Workers Comp Codes, Zone)
Cost Accounting – Inventory screen	Toolbar button **Inventory lookup values**, or **Options** > **Inventory Lookup Values**; opens the **Inventory Lookup Values** window	Inventory Category, Inventory Location
Cost Accounting – RBF screen	Toolbar button **RBF lookup values**; opens the **Road/Bridge Facilities Lookup Values** window	Bridge/Facility Type
Cost Accounting – Activity screen	Toolbar button **Actvity lookup values**; opens the **Activity Lookup Values** window	Workers Comp Codes
Accounts Payable	**Accounts Payable Utilities** > **Lookup Values**	Management Unit, Program, Zone
Equipment Maintenance	**EMS Utilities** > **Lookup Values**	Department, Equipment Condition, Equipment Maintenance Type, Equipment Status, Fuel Type, Part Category, Repair Type, Work Order Status
Road Inventory	**RIS Utilities** > **Lookup Values**	Road inventory tables (about 30)
Service Requests	**SRS Utilities** > **Lookup Values**	Contact Method, Priority, Response Method
Vegetation Management	**Lookup Values** menu group	Each list is a separate screen; this portal does not use the shared Lookup Values screen

Lookup Values screen elements

ELEMENT	WHAT IT DOES
Lookup values tables: (dropdown, placeholder "Select a lookup values table...")	Chooses the table to show. Type to filter the list.
View associated screens	Opens the **View Associated Screens** window, which lists the table names linked to the chosen lookup table.

ELEMENT	WHAT IT DOES
Message "Select a lookup table from the dropdown to view its data."	Shown when no table is chosen.
Grid	Shows the chosen table's values.

Lookup grid buttons

BUTTON	WHERE	WHO SEES IT
Add new record. (ctrl+shift+a)	Grid header (plus)	2 - Read/Write or higher, and the table's add level
Export grid as an Excel file.	Grid header	2 - Read/Write or higher on the screen (same check as Add)
Edit record (ctrl+shift+e)	Each row (pencil)	2 - Read/Write or higher
Duplicate record	Each row	Users whose level meets the table's add level
Delete record	Each row (trash)	Levels above 2 - Read/Write, on tables that allow deleting
Checkmark	Row being edited	Saves the row
Refresh and page size (100, 250, 500, 750, 1000)	Grid footer	All users

Messages

MESSAGE	WHEN IT APPEARS	WHAT TO DO
Select a lookup table from the dropdown to view its data.	No table is chosen.	Choose a table in the dropdown.
Please select a valid lookup table.	**View associated screens** was clicked with no table chosen.	Choose a table first.
The result contained no records	The chosen table has no values (or none match your filters).	Add a value or clear filters.
Your Name is required.	You save a row with no Name.	Enter a Name.
Not authorized to affect system data.	You save changes to a row marked Is System Data.	System data cannot be changed. Add a new value instead.
Record List contains System Data which cannot be deleted.	You delete a row marked Is System Data.	System data cannot be deleted.

MESSAGE	WHEN IT APPEARS	WHAT TO DO
Record has been modified by someone else since being queried from the database, refresh and try your update again	Another user changed the row after you loaded it.	Refresh the grid and make your change again.

Tips and notes

Tip: Use the Utilities portal when you need a lookup table from another module. Its dropdown lists every lookup table, while other portals list only their own.

Note: If an inventory location you need is missing, add it under Lookup Values (Inventory Location) first. You can then use it on an inventory record.

Important: Rows marked Is System Data cannot be edited or deleted. Add a new value instead.

Important: Deleting a lookup value removes it permanently, along with its comments and documents. Before you delete a value, check where the table is used with **View associated screens**.

Note: Choosing a table in the dropdown only displays its values. Nothing changes until you add, edit or delete and save a row.

Note: The Is System Data column shows true or false and cannot be edited. New values are saved as false.

Related topics

- Navigating portals and pages
- Data grid overview and basics
- Grid viewing and editing
- Grid filters
- Security Administration: access levels by user
- Units of measure, fiscal years and organizations

Notifications

Overview

IRIS10 sends you a notification when background work you started finishes (Excel exports, screen reports and postings) and when service requests change. Notifications appear in three places:

- The bell badge in the application header.
- The Notifications tray, which opens below the bell.
- The Notifications window, which is larger and movable.

Excel exports that send notifications start from data grids. See Data grid overview and basics.

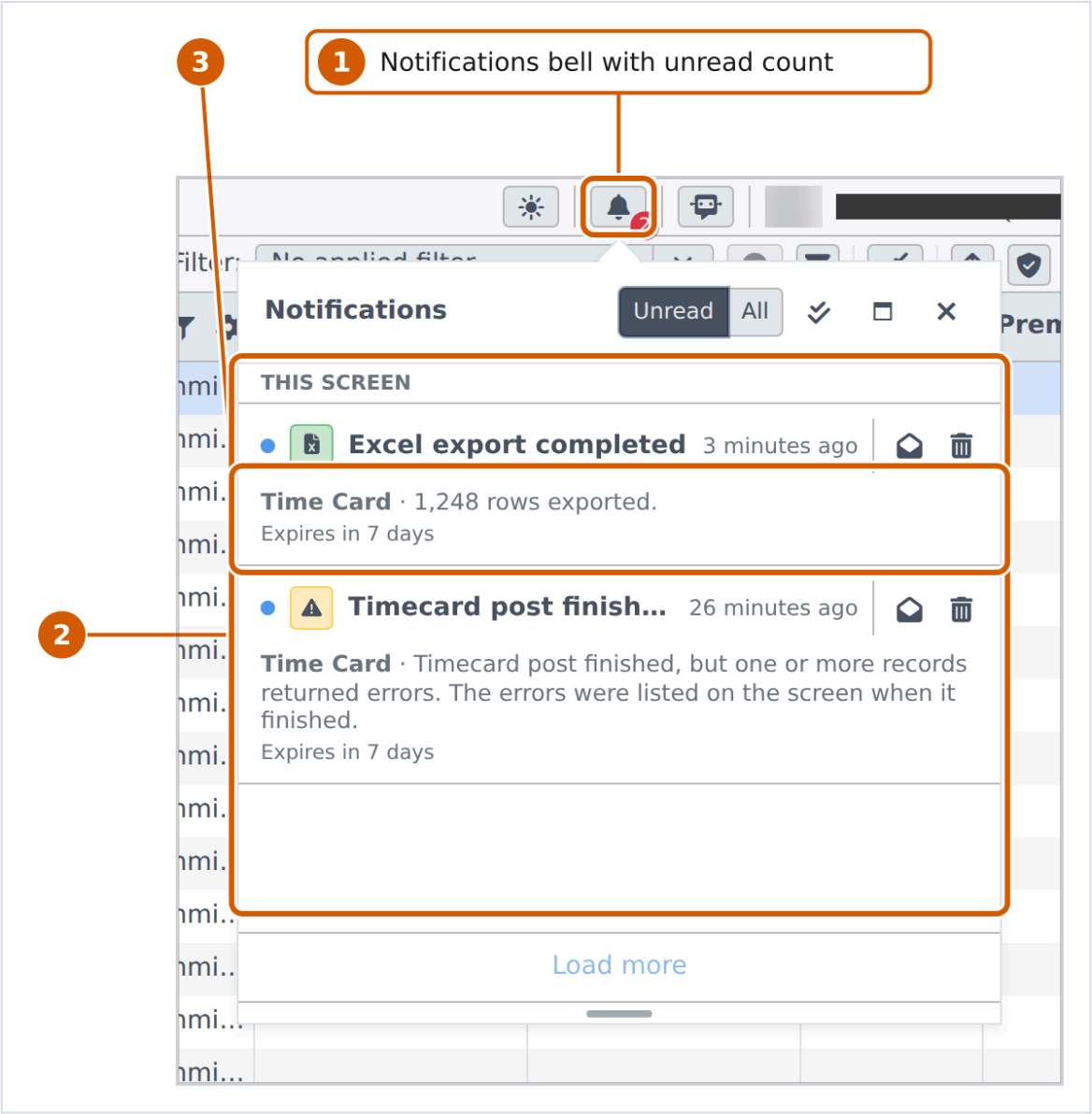
Before you begin

- Sign in to IRIS10.
- Know where the application header and the File menu are. See Navigating portals and pages.
- To choose how you are notified for each action, use My IRIS Settings. See My IRIS Settings.

Procedure

Check your notifications from the bell

1. Look at the **Notifications** bell button in the application header. A small red badge on the bell shows how many unread notifications you have. Counts above 99 show as `99+`.
2. Click the **Notifications** bell. The Notifications tray opens below the bell and shows your unread notifications. If you have none, it reads "No unread notifications".



Click the Notifications bell to open the tray of unread notifications.

1. Notifications bell with unread count
2. Notifications tray
3. A notification card

3. To see older notifications, scroll to the bottom of the tray and click **Load more**. Four more notifications are added to the list. Once the tray holds 40, **Load more** opens the Notifications window instead (tooltip "Open the notifications window to see more.").
4. Optional: drag the handle at the bottom of the tray. The tray grows, up to one and a half times its normal height.
5. Close the tray by pressing Escape. The tray closes.

> **Note:** You can also close the tray by clicking **Close** in the tray header or by clicking the bell again.

Open the Notifications window

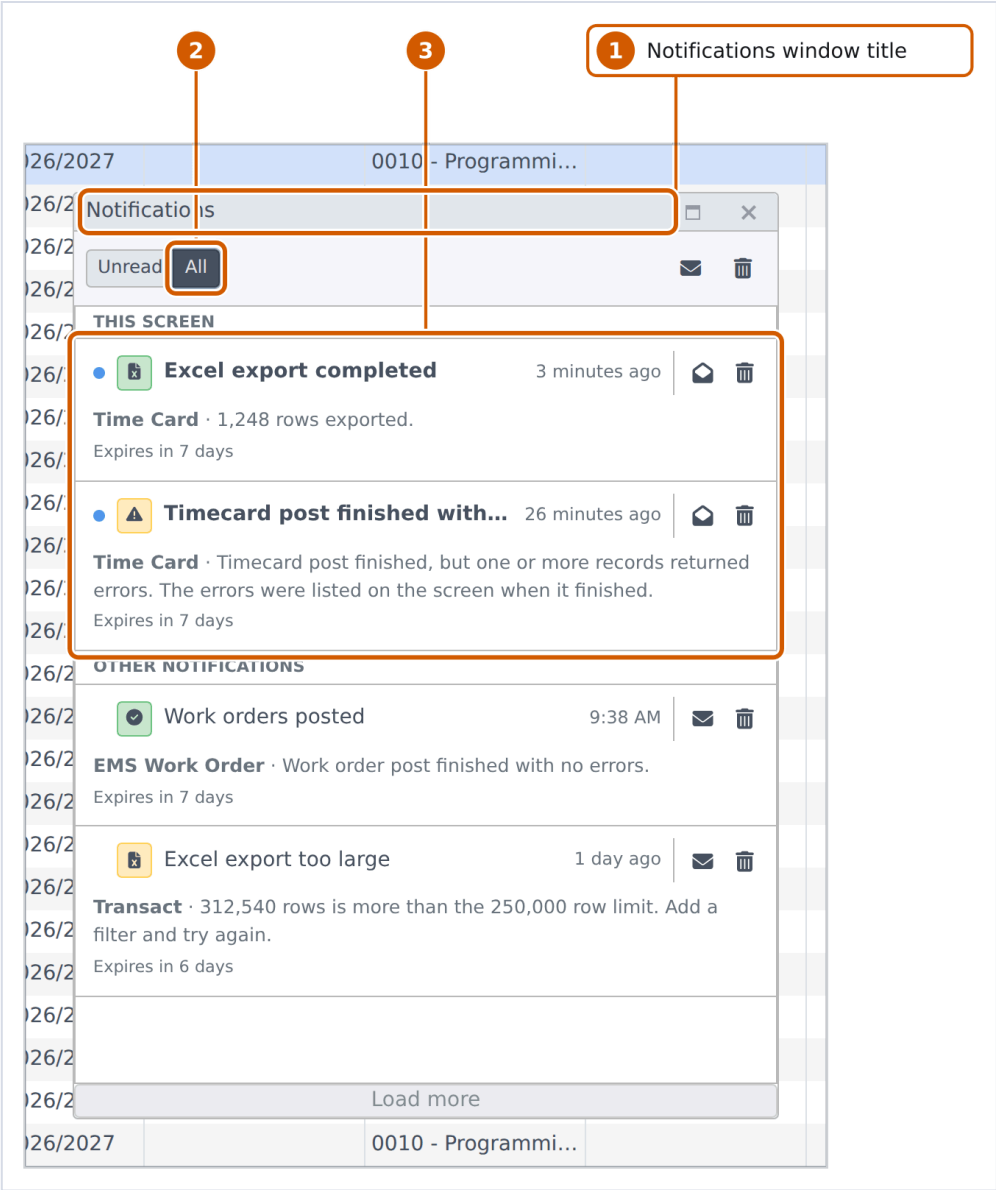
1. Click the **File** menu in the header. The File menu opens. The **Notifications** item (bell icon, just above **Logout**) shows its own unread-count badge when you have unread notifications.
2. Click **Notifications**. The Notifications window opens in the centre of the screen with **Unread** and **All** buttons, the list and a **Load more** button. You can keep working on the screen behind it.

   > **Note:** Alternatively, with the tray open, click **Open the notifications window** in the tray header. The Notifications window opens.

3. Optional: drag the window by its title bar. The window moves.
4. Optional: resize the window from an edge. The window resizes.
5. Optional: maximize the window. The window fills the screen.
6. Click **Load more** at the bottom of the window. The next 20 notifications are added. **Load more** is unavailable when there is nothing more to load.
7. Click the window's **Close** button when finished. The window closes.

Switch between unread and all notifications

1. In the tray or the Notifications window, click **All**. The list shows read and unread notifications. **Mark all as unread** and **Delete all read notifications** appear; **Mark all as read** is hidden. An empty list reads "No notifications".



The Notifications window in the All view, with Mark all as unread and Delete all read notifications available.

1. Notifications window title
2. All view
3. Notification list

2. Click **Unread** to return to the default view. Only unread notifications are listed and **Mark all as read** appears. An empty list reads "No unread notifications". The choice is shared, so the tray and the window always show the same view.

Mark one notification read or unread, or delete it

1. Click the body of an unread card. The notification is marked read. In the Unread view it leaves the list; in the All view it stays and loses its unread styling.

> **Note:** Alternatively, click the card's **Mark as read** or **Mark as unread** button. The card's read state flips. In the Unread view a card marked read disappears from the list.

2. To remove a notification, click the card's **Delete notification** button. The notification is deleted. Deleted notifications cannot be recovered.

Mark all notifications read

1. In the tray or window, make sure **Unread** is selected. The **Mark all as read** button is shown. It is unavailable when you have no unread notifications.
2. Click **Mark all as read**. All of your unread notifications in the county you are signed in to are marked read, and the Unread list empties.

Mark all notifications unread or delete all read notifications

1. In the tray or window, click **All**. **Mark all as unread** and **Delete all read notifications** are shown. Both are unavailable when you have no read notifications.
2. To restore everything to unread, click **Mark all as unread**. All of your notifications in the current county are marked unread.
3. To clear out read notifications, click **Delete all read notifications**. A confirmation asks "Delete all of your read notifications? This cannot be undone." with **Delete** and **Cancel** buttons.
4. Click **Delete** to proceed. Your read notifications in the current county are permanently removed; unread ones remain.

> **Note:** Click **Cancel** instead to keep them.

Show notifications that arrived while the list is open

1. While the tray or window is open, watch for the **New notifications** button at the top of the list. When new notifications arrive, a **New notifications** button (up-arrow icon) appears. The list does not reload by itself.
2. Click **New notifications**. The list scrolls to the top and reloads with the new notifications.

Choose how you are notified for each action

1. Open My IRIS Settings and go to the **Notifications** category. See My IRIS Settings. Settings are listed per action, grouped by feature group (Exports, Reports, CAS, APS, ARS, EMS, SWS, VMS, SRS).
2. For an action, turn **Show in IRIS** on or off. When on, a card appears in your tray and window for that action. When off, no card is saved.
3. Where available, turn **Send me an email** on or off. When on, IRIS also emails you the notification. **New Requests**, **Reassigned Requests** and **Reinstated Requests** have no email option.

4. For **Excel Export** and **Screen Reports**, select or clear **Attach the generated file**. The checkbox can be changed only while **Send me an email** is on. When selected, the file is attached to the email and the card message ends "A copy was sent to your email."

Reference

Actions that send a notification

Each user chooses delivery per action in My IRIS Settings.

FEATURE GROUP	SETTING	CARD TITLES / RESULTS	DELIVERY OPTIONS
Exports	Excel Export	Excel export completed; Excel export too large; Excel export failed	Show in IRIS, Send me an email, Attach the generated file
Reports	Screen Reports	Report completed; Report failed	Show in IRIS, Send me an email, Attach the generated file
CAS	Post Timecards (also covers held equipment reading posts)	Timecards posted; Timecard post finished with errors; Timecard post failed; Timecard post result unknown	Show in IRIS, Send me an email
CAS	Post Inventory Receiving; Post Inventory Transfers; Post Accrued Time; Post Inventory Physical Count	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
APS	Release Approved Payments	Payments released, or a finished with errors / failed / result unknown title	Show in IRIS, Send me an email
ARS	Issue Approved Invoices	Invoices issued, or a finished with errors / failed / result unknown title	Show in IRIS, Send me an email
EMS	Post Maintenance Entries; Post Work Orders; Post Reading Updates	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
SWS	Post Inspection Entries; Post Maintenance Entries; Post Road Rating Entries	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
VMS	Post Spray Reports to CAS	Completed, finished with errors, failed or result unknown; each title names the post	Show in IRIS, Send me an email
SRS	New Requests; Reassigned Requests; Reinstated Requests	New service request; Service request reassigned; Service request reinstated	Show in IRIS only

FEATURE GROUP	SETTING	CARD TITLES / RESULTS	DELIVERY OPTIONS
SRS	Completed Requests	Service request completed (one notification listing the request numbers when several are completed together)	Show in IRIS, Send me an email

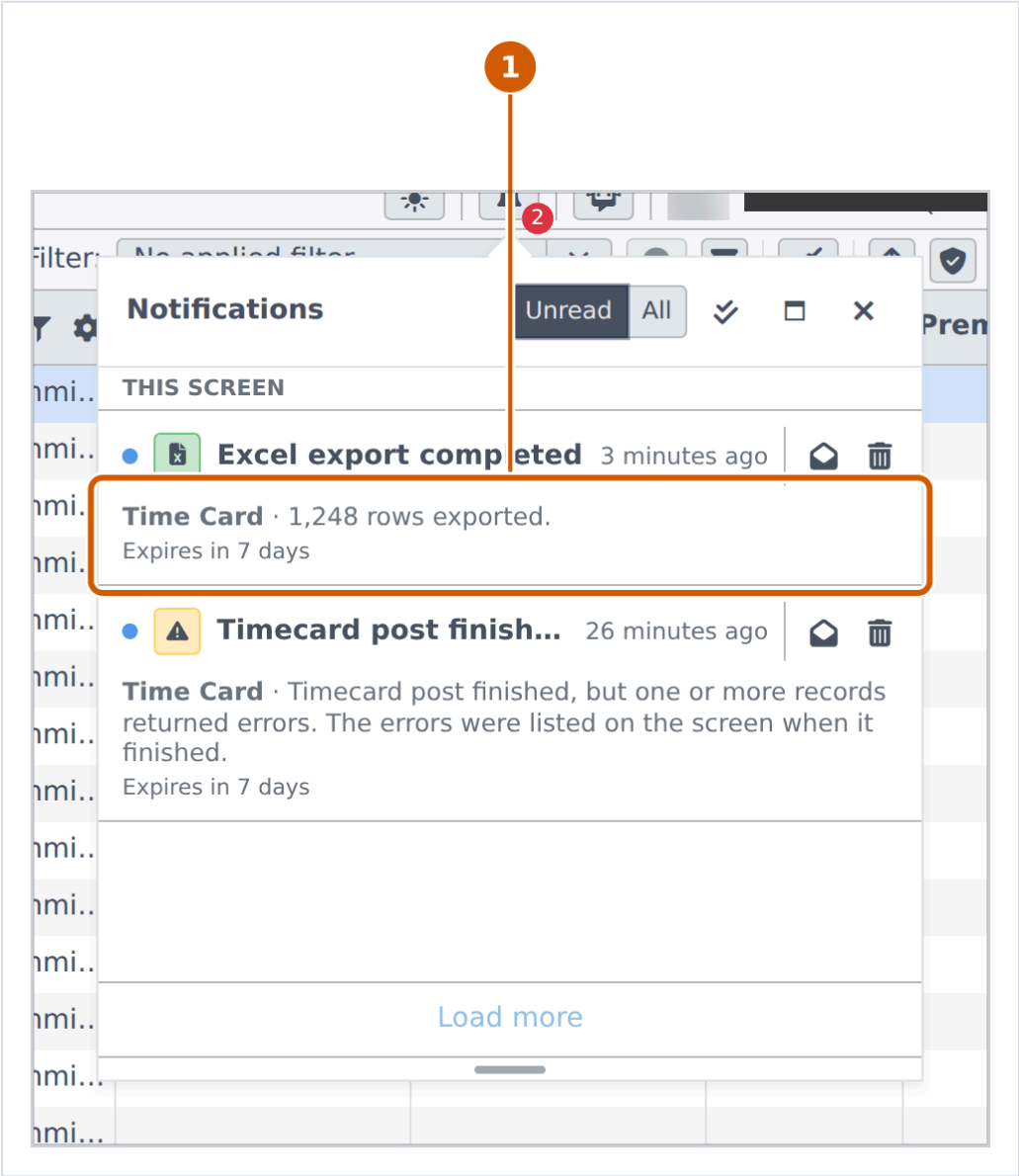
What posting results mean

RESULT	MEANING
Completed	The post finished successfully.
Finished with errors	The post finished, but some records had errors (shown as a warning).
Failed	The post did not complete (shown as an error).
Result unknown	IRIS lost contact before the post finished; the post may still have completed. Check the records before posting again.
No notification	A post rejected by validation, or one that finds no records, sends no notification.

Default delivery settings

OPTION	DEFAULT
Show in IRIS	On
Send me an email	Off
Attach the generated file	On (takes effect only when email is on)

Notification card



A notification card shows its title, age, message and expiry, with buttons to mark it read or unread and to delete it.

1. Card: title, age, message, expiry, Mark as read and Delete notification buttons

PART	WHAT IT SHOWS
Title	What happened, for example Excel export completed. A notification without a title shows "Notification".
Age	"Moments ago", then minutes ago, then the time of day for today, then days ago for up to 6 days, then the full date and time. Hover to see the full date and time.
Message	Details, prefixed with the screen name when known. May end "A copy was sent to your email." or "The file was too large to attach to your notification email."

PART	WHAT IT SHOWS
Expiry line	"Expires in moments", "Expires in N minutes", "Expires today at <time>", "Expires tomorrow at <time>" or "Expires in N days"; highlighted when less than 24 hours remain.
Unread style	Unread cards are styled differently from read cards.
Mark as read / Mark as unread	Flips the card's read state.
Delete notification	Permanently deletes the card.

Unread and All views

VIEW	BULK BUTTONS SHOWN	EMPTY LIST TEXT
Unread (default)	Mark all as read (unavailable when nothing is unread)	No unread notifications
All	Mark all as unread; Delete all read notifications (unavailable when nothing is read)	No notifications

Tray and window compared

	TRAY	NOTIFICATIONS WINDOW
Opened from	Notifications bell in the header	File > Notifications, or Open the notifications window in the tray
Loads	4 at a time; after 40, Load more opens the window	20 at a time
Size	Fixed width; can be dragged taller	Movable, resizable, can be maximized
Controls	Unread/All, bulk buttons, Open the notifications window, Close, Load more	Unread/All, bulk buttons, Load more, Maximize, Close
Closes with	Escape, Close or the bell	Close

Tips and notes

Important: Deleting a notification, or using **Delete all read notifications**, is permanent. Deleted notifications cannot be recovered.

Note: Notifications expire. If no expiry is set, a notification expires 7 days after it was created and is then removed automatically. Removal runs periodically, so an expired card may remain visible for a short time.

Note: The unread count refreshes about once a minute while the IRIS tab is visible, and again when you return to the tab.

> **Tip:** When the screen you are on has notifications of its own, the list shows them first under "This screen", with the rest under "Other notifications".

> **Note:** An Excel export of 250,000 rows or more is not produced; you get an "Excel export too large" notification asking you to add a filter. See Grid filters.

> **Note:** If a generated file is larger than the allowed attachment size, it is not attached and the message says "The file was too large to attach to your notification email."

> **Important:** Email is sent only when you turned on **Send me an email** for that action and your user record has a valid email address. No email is sent while an administrator is signed in as you.

> **Note:** For service requests, the person who made the change is not notified. New, reassigned and reinstated requests are shown only in IRIS.

> **Note:** Notifications belong to you alone, and bulk actions affect only your notifications in the county you are signed in to.

> **Tip:** Clicking a card marks it read. To keep it unread, use **Mark as unread** on the card afterwards.

Related topics

- My IRIS Settings
- Navigating portals and pages
- Grid filters
- Data grid overview and basics