IRIS 10 — Utilities

User manual

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My IRIS Settings

Overview

My IRIS Settings is a window in the Utilities portal where you set your personal preferences for the county you are working in. Settings are saved for the county you are currently working in.

Some settings depend on your access. The Time Card settings (Default Date, Associate Road and Associate Project) appear only if you have Read/Write or higher access to the Time Card screen. Notification settings always appear.

Before you begin

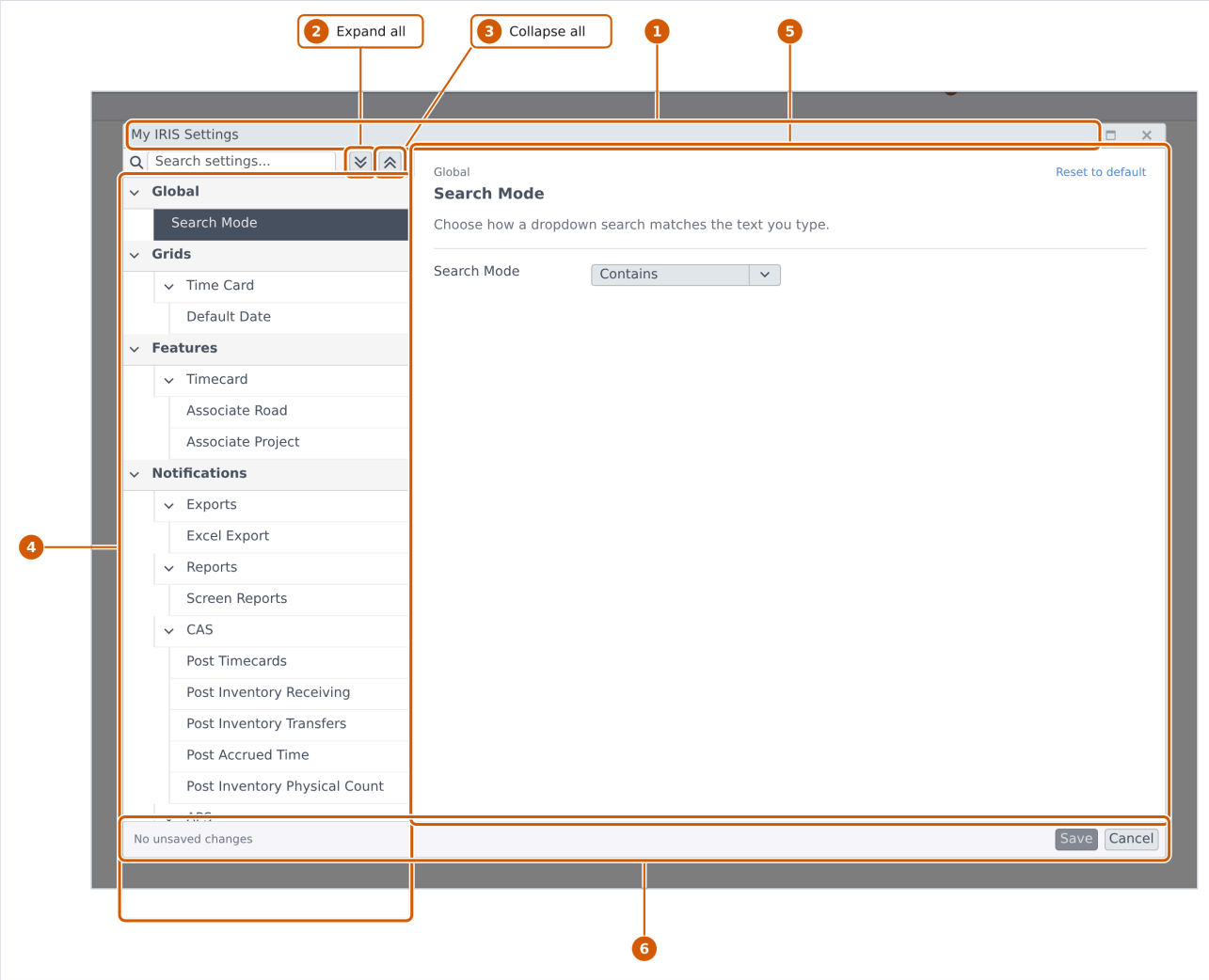
- Sign in to IRIS10. See Logging in. The county you choose when you sign in determines where your settings are saved.
- Make sure you have access to the My IRIS Settings screen in the Utilities portal. See Security Administration: access levels by user.
- For the Time Card settings, make sure you have Read/Write or higher access to the Time Card screen.

Procedure

Open My IRIS Settings and find a setting

1. In the Utilities portal, open My IRIS Settings. A window titled **My IRIS Settings** opens with the settings tree on the left, a detail panel, and a footer showing **No unsaved changes** with **Save** and **Cancel**.

   > **Note:** If you do not have access to My IRIS Settings, the screen does not open and no message is shown. Ask your IRIS administrator for access.



The My IRIS Settings window, with the settings tree, the detail panel for Search Mode, and the footer.

1. Window title
2. Expand all
3. Collapse all
4. Settings tree
5. Detail panel with Reset to default
6. Unsaved-changes status, Save and Cancel

2. Look over the settings tree. All categories start expanded. Click **Collapse all** to fold them, or **Expand all** to open them again. The tree shows the Global, Grids, Features and Notifications categories and their settings.

> **Note:** The Grids and Features categories appear only if you have Read/Write or higher access to the Time Card screen. Notification settings always appear.

3. To find a setting, type in the **Search settings** box above the tree. The box shows how many settings match what you typed.
4. Select a setting in the tree. The detail panel shows the setting's category and name, a **Reset to default** button, a short description, and the control for its value.

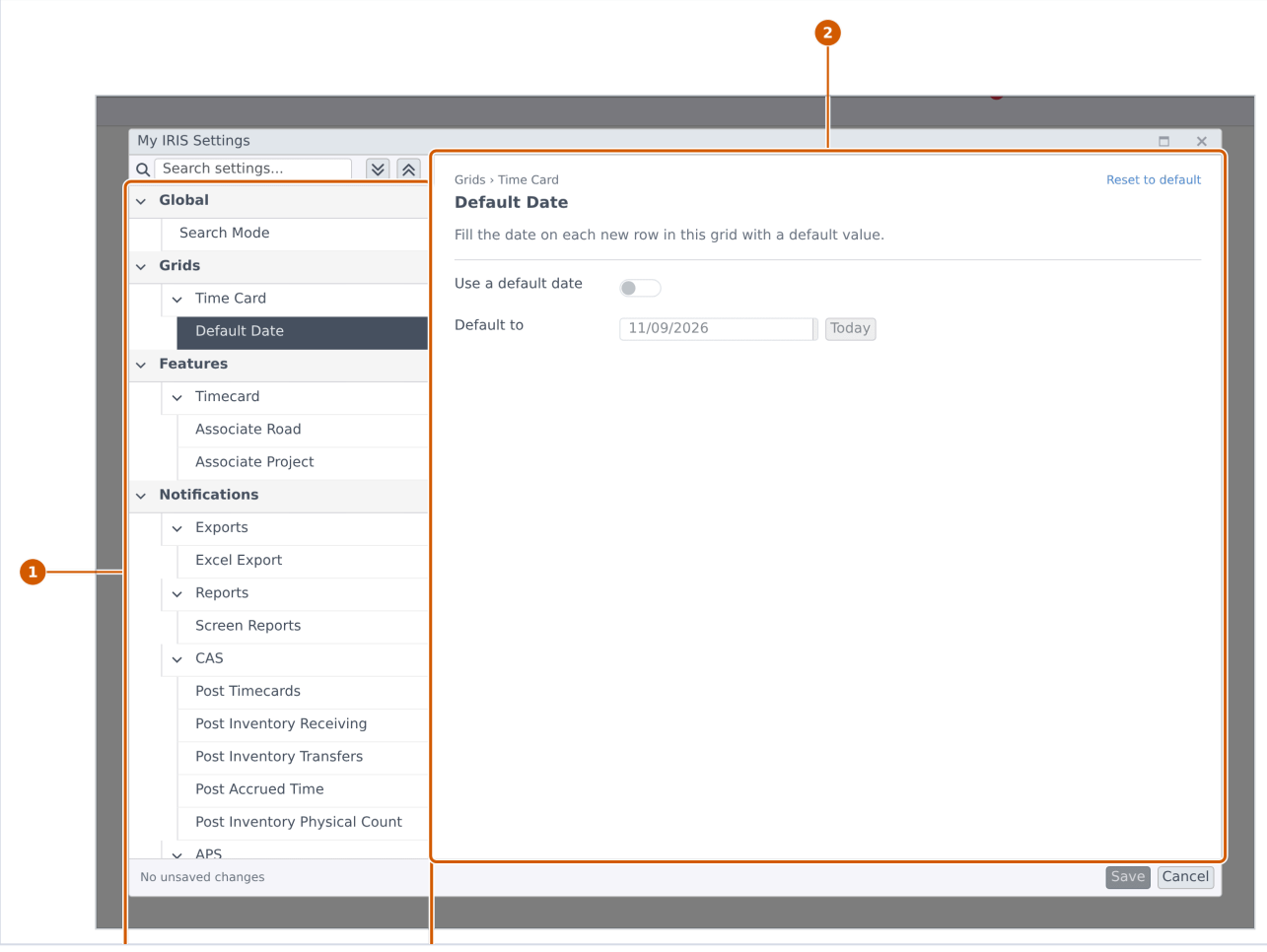
Change how dropdown searches match (Search Mode)

1. In the tree, under **Global**, select **Search Mode**. The detail panel reads "Choose how a dropdown search matches the text you type." and shows the **Search Mode** dropdown (`Contains` by default).
2. In the **Search Mode** dropdown, choose `Starts With` or `Contains`. The footer shows **1 unsaved change** and **Save** becomes available.
3. Click **Save**. The footer shows **Settings saved**.

Set a default Task Date for new timecards

1. In the tree, under **Grids** > **Time Card**, select **Default Date**. The detail panel shows the **Default Date** setting, which is off by default.

> **Note:** This setting is shown only if you have Read/Write or higher access to the Time Card screen.



Default Date fills the Task Date of new timecards with Today or a date you choose.

1. Grids > Time Card > Default Date
2. Default Date setting

2. Turn **Default Date** on and choose Today or a specific date. The footer counts the unsaved change and **Save** becomes available.
3. Click **Save**. The footer shows **Settings saved**. New timecards fill the Task Date with the date you chose.

Fill timecard details from a road or project

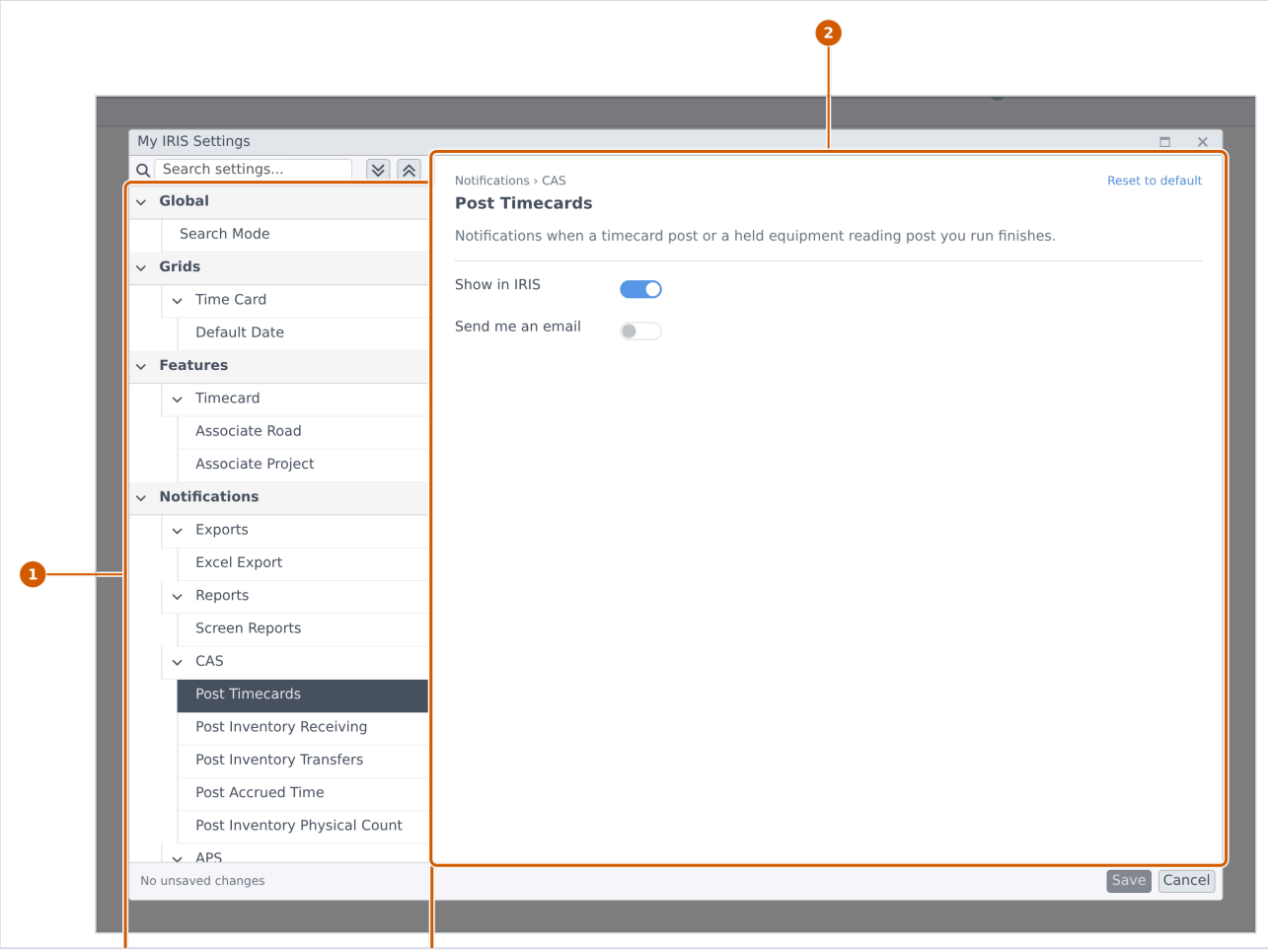
1. In the tree, under **Features** > **Timecard**, select **Associate Road** or **Associate Project**. The detail panel shows the setting. Both are off by default.

   > **Note:** These settings are shown only if you have Read/Write or higher access to the Time Card screen.

2. Turn the setting on. **Associate Road** fills a timecard's management unit, program and zone from the road you pick. **Associate Project** fills management unit, program, zone, road, points and locations from the project.
3. Click **Save**. The footer shows **Settings saved**.

Choose how you receive a posting notification (example: CAS > Post Timecards)

1. In the tree, under **Notifications** > **CAS**, select **Post Timecards**. The detail panel shows **Show in IRIS** (on by default) and **Send me an email** (off by default).



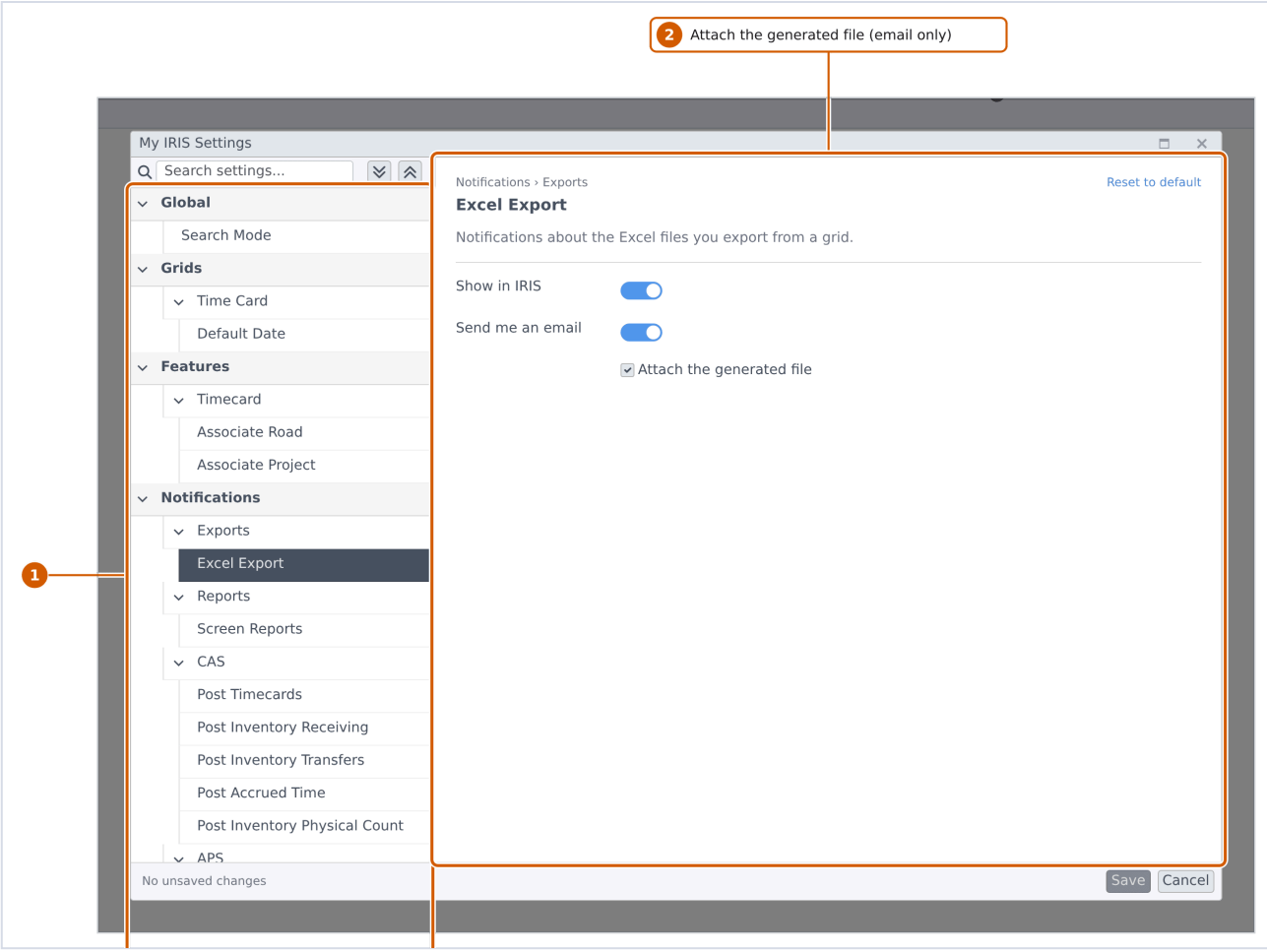
Notification setting for CAS > Post Timecards: choose whether to see it in IRIS and whether to receive an email.

1. Notifications > CAS > Post Timecards
2. Show in IRIS and Send me an email

2. Turn **Show in IRIS** on or off to choose whether the notification appears inside IRIS. The footer counts the unsaved change.
3. Turn **Send me an email** on or off to choose whether you also get the notification by email. The footer counts the unsaved change.
4. Click **Save**. The footer shows **Settings saved**.

Attach the generated file to Excel Export or Screen Reports emails

1. In the tree, under **Notifications**, select **Exports** > **Excel Export** or **Reports** > **Screen Reports**. The detail panel shows **Show in IRIS**, **Send me an email** and the **Attach the generated file** checkbox.



Excel Export notification: Attach the generated file can be used only while Send me an email is on.

    1. Notifications > Exports > Excel Export
    2. Attach the generated file (email only)
2. Turn **Send me an email** on. The **Attach the generated file** checkbox becomes available.
3. Select or clear **Attach the generated file** (selected by default). When selected, the exported file or report is attached to the email.
4. Click **Save**. The footer shows **Settings saved**.

Close the window without saving

1. Click **Cancel**. With no unsaved changes, the window closes. With unsaved changes, IRIS asks "You have unsaved changes. Close without saving them?"
2. Click **Close** to discard your changes. The window closes without saving.

   Alternatively, click **Keep Editing**. You return to your changes.
3. To reopen the window, click **Open My IRIS Settings** on the page. The My IRIS Settings window opens again.

Reference

Settings in My IRIS Settings

TREE LOCATION	SETTING	WHAT IT DOES	DEFAULT
Global	Search Mode	Chooses Starts With or Contains for dropdown searches that normally match anywhere in the text.	Contains
Grids > Time Card	Default Date	Fills the Task Date of new timecards with Today or a date you choose.	Off
Features > Timecard	Associate Road	Fills a timecard's management unit, program and zone from the road you pick.	Off
Features > Timecard	Associate Project	Fills management unit, program, zone, road, points and locations from the project.	Off
Notifications > Exports	Excel Export	Show in IRIS, Send me an email, and Attach the generated file.	Show in IRIS on; Send me an email off; Attach the generated file on
Notifications > Reports	Screen Reports	Show in IRIS, Send me an email, and Attach the generated file.	Show in IRIS on; Send me an email off; Attach the generated file on
Notifications > CAS	Post Timecards, Post Inventory Receiving, Post Inventory Transfers, Post Accrued Time, Post Inventory Physical Count	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > APS	Release Approved Payments	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > ARS	Issue Approved Invoices	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > EMS	Post Maintenance Entries, Post Work Orders, Post Reading Updates	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > SWS	Post Inspection Entries, Post Maintenance Entries, Post Road Rating Entries	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > VMS	Post Spray Reports to CAS	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off
Notifications > SRS	New Requests, Reassigned Requests, Reinstated Requests	Show in IRIS only; no email option.	Show in IRIS on

TREE LOCATION	SETTING	WHAT IT DOES	DEFAULT
Notifications > SRS	Completed Requests	Show in IRIS and Send me an email.	Show in IRIS on; Send me an email off

Footer status messages

MESSAGE	MEANING
No unsaved changes	Nothing has changed since the window opened or was last saved; Save is unavailable.
1 unsaved change / N unsaved changes	How many settings you have changed but not saved.
Settings saved	Your changes were saved.

Tips and notes

Important: Settings are saved for the county you are currently working in. If you work in more than one county, set your preferences in each one.

Note: A saved change also applies to your other open IRIS tabs in the same county. Tabs open in a different county keep that county's settings.

Note: Only the Time Card settings (Default Date, Associate Road, Associate Project) depend on your access. Without Read/Write or higher access to the Time Card screen, the Grids and Features categories do not appear. Notification settings always appear.

Tip: You can also switch Associate Road and Associate Project from the Options menu on the Time Card screen.

Note: Attach the generated file is offered only for Excel Export and Screen Reports, and only while **Send me an email** is on. It attaches the file to the email, not to the notification in IRIS. Posting notifications such as Post Timecards have no attach option.

Note: New Requests, Reassigned Requests and Reinstated Requests (SRS) appear only in IRIS; they have no email option.

Tip: Post Maintenance Entries appears twice in the tree, once under EMS and once under SWS. Check the category you are under before changing it.

Note: The light or dark theme is also saved for each county, but you set it with the theme button in the page header, not in this window. See Navigating portals and pages.

Related topics

- Notifications
- Grid viewing and editing
- Navigating portals and pages
- Security Administration: access levels by user
- Logging in

Security Administration: access levels by user

Overview

Security Administration lets you view and change the security levels of IRIS users for your county. Only users with General Access Level 5 - County Admin or higher can open the editor. Users below level 5 see the message 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.

The editor has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. This page covers the **Set Security by User** tab. For the other tabs, copying user security and resetting security, see Security Administration: screens, reports, copying and resetting.

IRIS decides the level that applies to a user in this order, highest priority first:

1. A page override, when the user has one on that page.
2. A portal override, when there is no page override and the user has an override on the portal.
3. The General Access Level, when there is no page or portal override.

Before you begin

- Sign in to IRIS10 for your county. See Logging in.
- Make sure your General Access Level is 5 - County Admin or higher.
- Know how to move between portals and pages. See Navigating portals and pages.

Procedure

Open Security Administration

1. In the Utilities portal, open **Security Administration**.

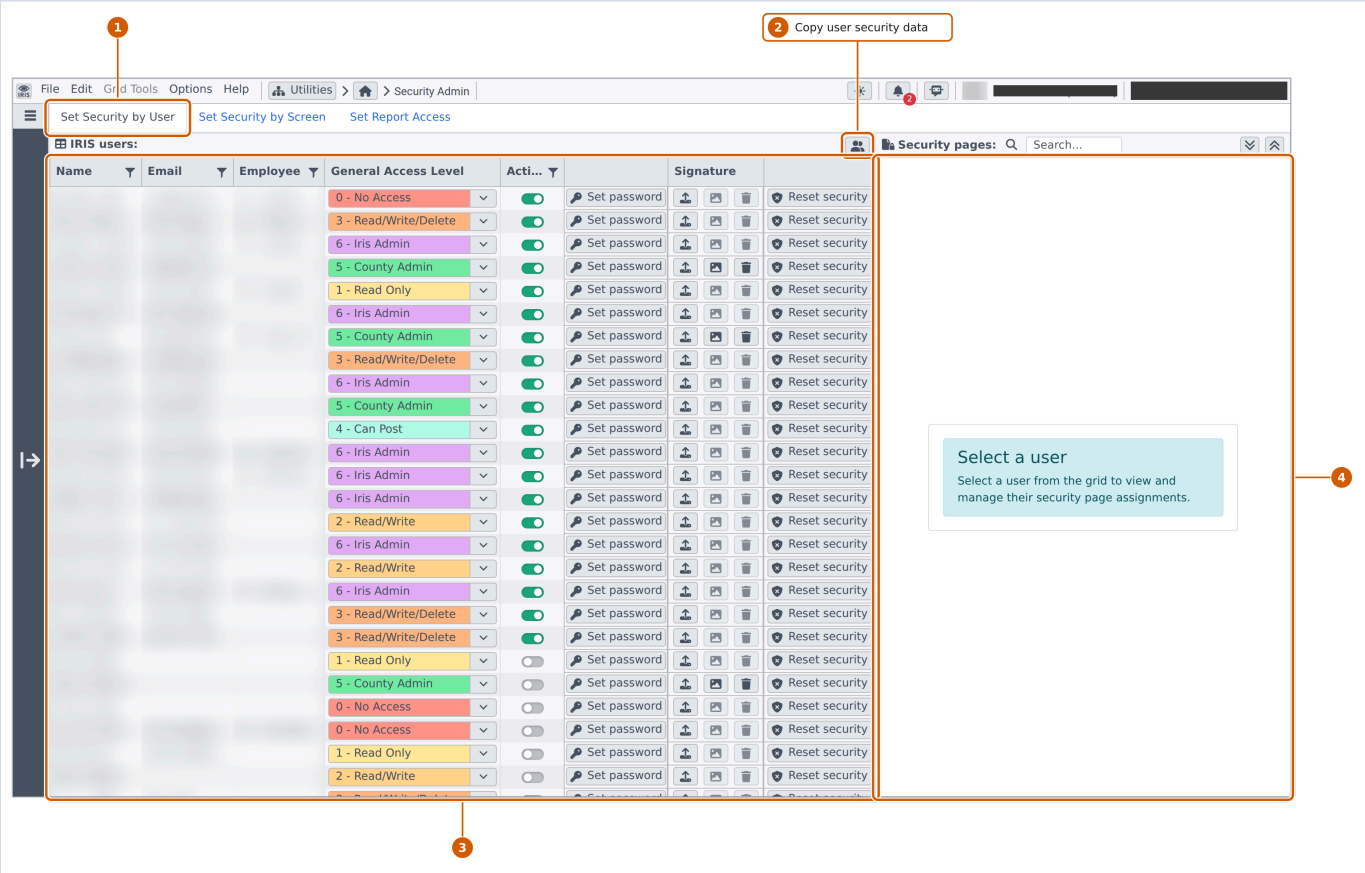
   The browser path is `/utilities/securityadmin`.

   > **Note:** Only users with General Access Level 5 - County Admin or higher see the editor.

2. Check what opens.

   The editor opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**. The **Set Security by User** tab shows the IRIS users grid and a **Select a user** card.

> **Note:** Users below level 5 see 'You do not have the required security level to access Security Administration.' and a **Home** button that returns to the Utilities portal.



Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left and the 'Select a user' card on the right.

1. Set Security by User tab
2. Copy user security data — covered on the companion page
3. IRIS users grid
4. Select a user

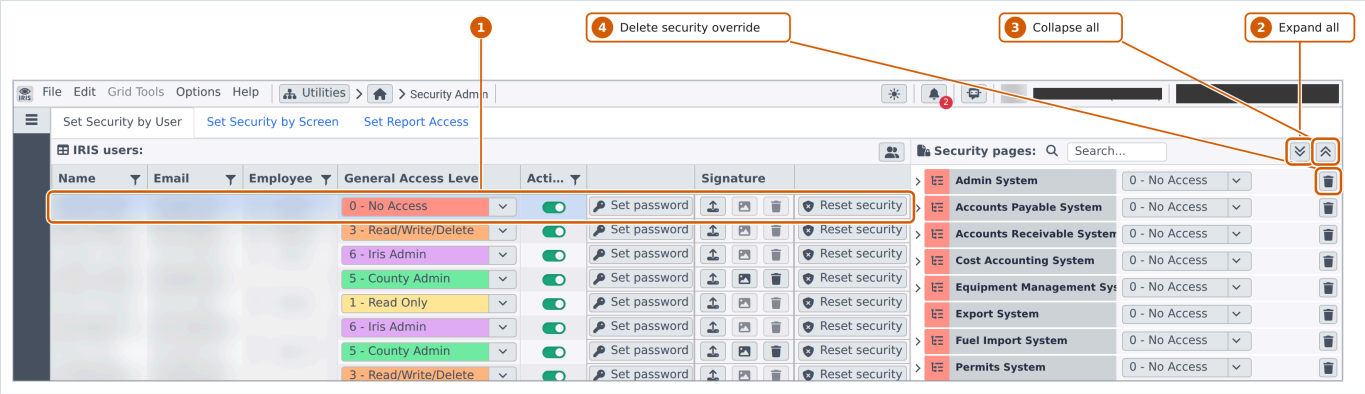
Select a user

1. On the **Set Security by User** tab, find the user in the IRIS users grid.

   To narrow the list, use the column filters. See Grid filters.
2. Click the user's row.

   The **Security pages** panel on the right shows that user's portals and pages, each with a level dropdown. The panel also has a search box and the **Expand all** and **Collapse all** buttons.
3. To see every page, click **Expand all**.

   All portals open to show their pages.



After you click a user's row, Security pages lists that user's portals and pages, each with a level dropdown and a Delete security override button.

1. Selected user
2. Expand all
3. Collapse all
4. Delete security override — available only when the item has its own override

Change a user's General Access Level

1. In the IRIS users grid, find the user's **General Access Level** dropdown and choose the new level.

   IRIS shows 'Warning! This will change the general access level to <level> for the user: <name>.' with **Accept** and **Cancel** buttons.

   > **Important:** Do not choose 6 - Iris Admin. That level is for the IRIS development and support team only.

2. Click **Accept**.

   IRIS saves the new level.

   > **Note:** To keep the current level, click **Cancel** instead. IRIS puts the previous level back and saves nothing.

3. Review the user's Security pages.

   The Security pages tree refreshes. Portals and pages without their own override now show the new General Access Level.

Set a portal or page level for a user

1. Click the user's row in the IRIS users grid.

   The user's Security pages appear.

2. In **Security pages**, find the portal or page.

   If needed, click **Expand all** or use the search box.

3. Choose a level in the dropdown next to the portal or page.

IRIS asks 'Change security level to <level> for <item>?' with **Accept** and **Cancel** buttons.

4. Click **Accept**.

   IRIS saves the level as an override for that portal or page, and the item's **Delete security override** button becomes available.

   > **Note:** To leave the level as it was, click **Cancel** instead.

Remove a portal or page override

1. Click the user's row and find the portal or page in **Security pages**.
2. Click the **Delete security override** button next to the item.

   For a portal, IRIS asks 'Are you sure you want to remove the security override for <item>? The effective level will revert to the general access level.' For a page, the message ends 'will revert to the portal level.' **Yes** and **No** buttons are shown.

   > **Note:** The button is available only when the item has its own override. Items that take their level from the portal or the General Access Level have it disabled.

3. Click **Yes**.

   IRIS removes the override. A portal goes back to the user's General Access Level, and a page goes back to the portal level.

   > **Note:** To keep the override, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, switch the user's **Active** switch on or off.

   The change saves right away, with no prompt.

Reference

Security levels

LEVEL (AS SHOWN)	WHAT IT ALLOWS
0 - No Access	No access to the portal or page. Access to a page needs level 1 or higher.
1 - Read Only	Open and view the portal or page.
2 - Read/Write	Adds editing records in grids. Whether **Add** appears depends on each screen's own add level.
3 - Read/Write/Delete	Adds deleting records in grids.
4 - Can Post	Adds posting menu items such as **Post**, **Approve** and **Void**.
5 - County Admin	County administrator. Can open Security Administration.

LEVEL (AS SHOWN)	WHAT IT ALLOWS
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Where a user's level comes from (highest priority first)

SOURCE	APPLIES TO	WHEN IT IS USED
Page override	One page	When the user has an override set on that page
Portal override	A portal and its pages without their own override	When there is no page override and the user has an override on the portal
General Access Level	Everything without an override	When there is no page or portal override

The General Access Level is a user's base security level for the county (0 to 6).

IRIS users grid (Set Security by User)

COLUMN OR CONTROL	WHAT IT SHOWS OR DOES
Name	User's name. Active users are listed first, then inactive users, each sorted by name.
Email	User's email address
Employee	Linked employee
General Access Level	Dropdown with the user's General Access Level. Changing it shows a warning with **Accept** and **Cancel**.
Active	On/off switch that saves right away
Set password	Opens the Set password window
Signature	Upload, view and delete buttons for the user's signature
Reset security	Removes the user's overrides after a warning. See Security Administration: screens, reports, copying and resetting.
Copy user security data (button above the grid)	Opens the Copy User Security window. See Security Administration: screens, reports, copying and resetting.

How the level affects buttons and menus

Toolbar buttons and menu items above the user's level are hidden. For what **Add**, **Edit** and **Delete** do in grids, see Grid viewing and editing. For the grid toolbar, see Data grid overview and basics.

ITEM	SHOWN WHEN
Toolbar buttons	The user's level for the screen is at least the level the button needs. Buttons above the user's level are not shown.
Add	Level 2 or higher, and the screen's own add level

ITEM	SHOWN WHEN
Edit records in grids	Level 2 - Read/Write or higher
Delete	Level 3 - Read/Write/Delete or higher
Post, Approve and Void menu items	Level 4 - Can Post or higher. Menu items above the user's level are hidden, not disabled.

Tips and notes

Important: 6 - Iris Admin is the System Administrator level, held only by the IRIS development and support team. Do not choose it for county users.

Note: Report pages never give more than 1 - Read Only, however high the user's page, portal or General Access Level is.

Tip: If **Delete security override** is greyed out, the item has no override of its own. It takes its level from the portal or from the General Access Level. To change the level, change the portal or the General Access Level, or set a new override on the item.

Note: Clicking **Cancel** on the General Access Level warning puts the previous level back. Nothing is saved.

Note: Security changes apply only to the county you are signed in to.

Tip: Release all approved payments needs only level 1. Do not treat it as a posting item.

Related topics

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

Security Administration: screens, reports, copying and resetting

Overview

Security Administration lets you work with the security of the users in your county. On it you can:

- Select a user and see their security.
- See and change which users have their own level on a portal or screen.
- Turn report access on or off for a user.
- Remove a security override.
- Copy one user's security to another user.
- Reset a user's security overrides.
- Make a user active or inactive.
- Set a user's password.
- Manage a user's signature.

The screen has three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.

Before you begin

- Sign in with a General Access Level of **5 - County Admin** or higher. With a lower level, IRIS shows "You do not have the required security level to access Security Administration." and a **Home** button that takes you back to the Utilities portal.
- Know how to move between portals. See Navigating portals and pages.
- Know how security levels and overrides work for a single user. See Security Administration: access levels by user.

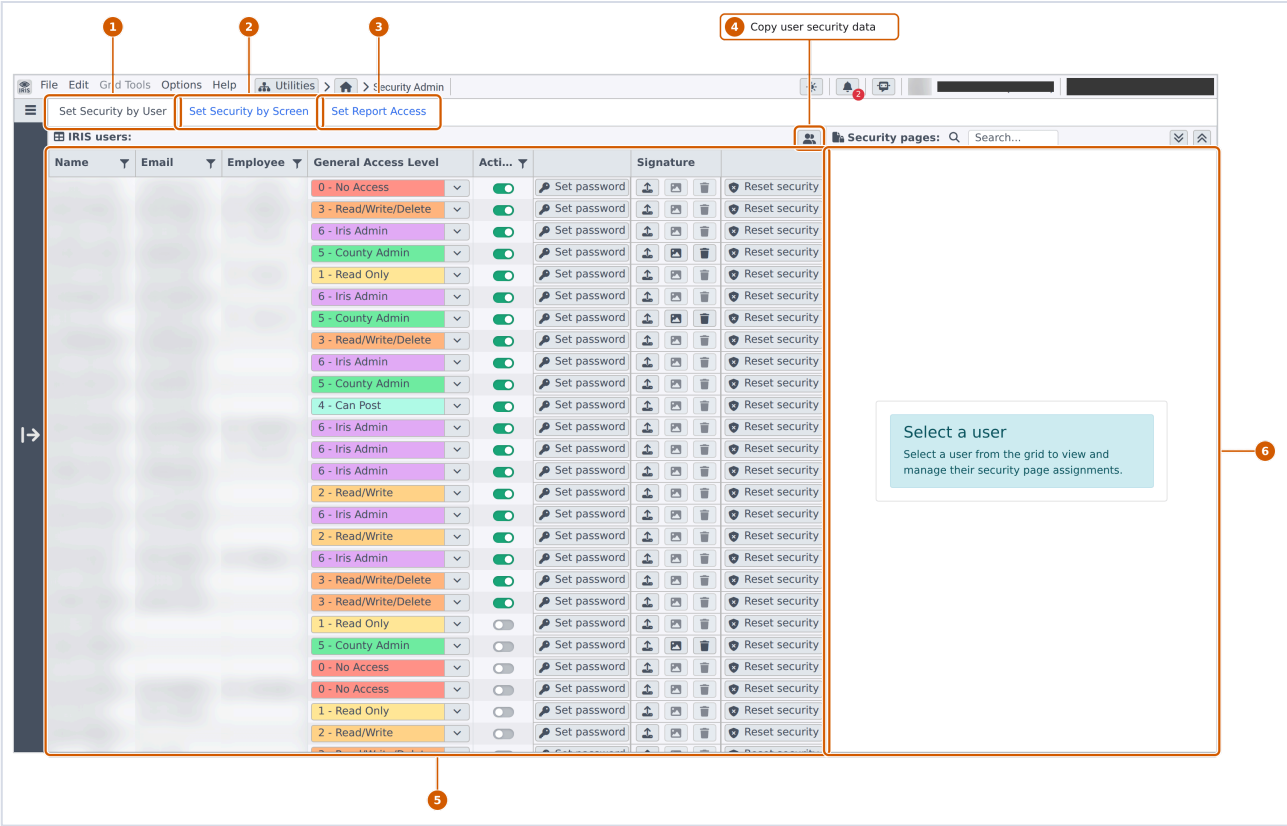
Procedure

Open Security Administration and select a user

1. Open the Utilities portal and choose **Security Administration**.

   The Security Administration screen opens with three tabs: **Set Security by User**, **Set Security by Screen** and **Set Report Access**.
2. On the **Set Security by User** tab, look at the IRIS users grid.

   The grid lists users with the columns **Name**, **Email**, **Employee**, **General Access Level**, **Active** and **Signature**. Active users are listed first, then inactive users, each sorted by name. The right-hand side shows "Select a user".

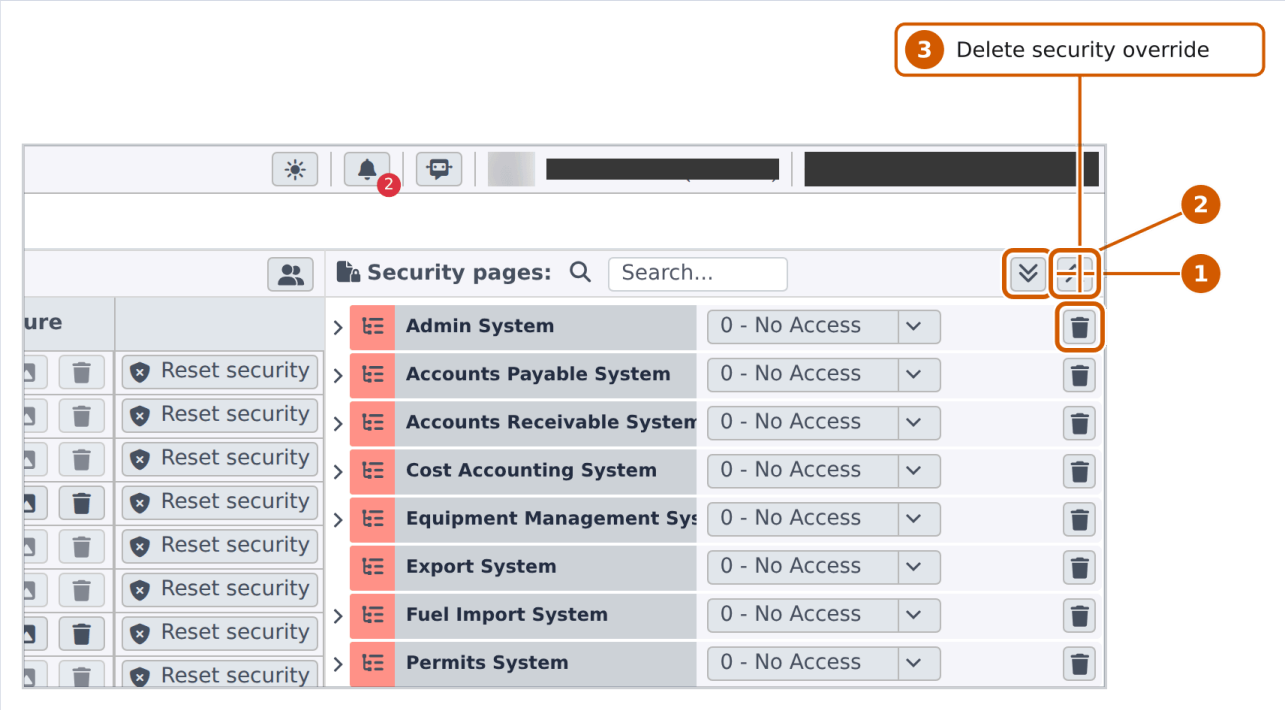


Security Administration opens on the Set Security by User tab, with the IRIS users grid on the left.

1. Set Security by User
2. Set Security by Screen
3. Set Report Access
4. Copy user security data
5. IRIS users grid
6. Select a user

3. Click anywhere in a user's row.

   The row is selected. The right-hand side shows **Security pages:** for that user, with a search box and the **Expand all** and **Collapse all** buttons.



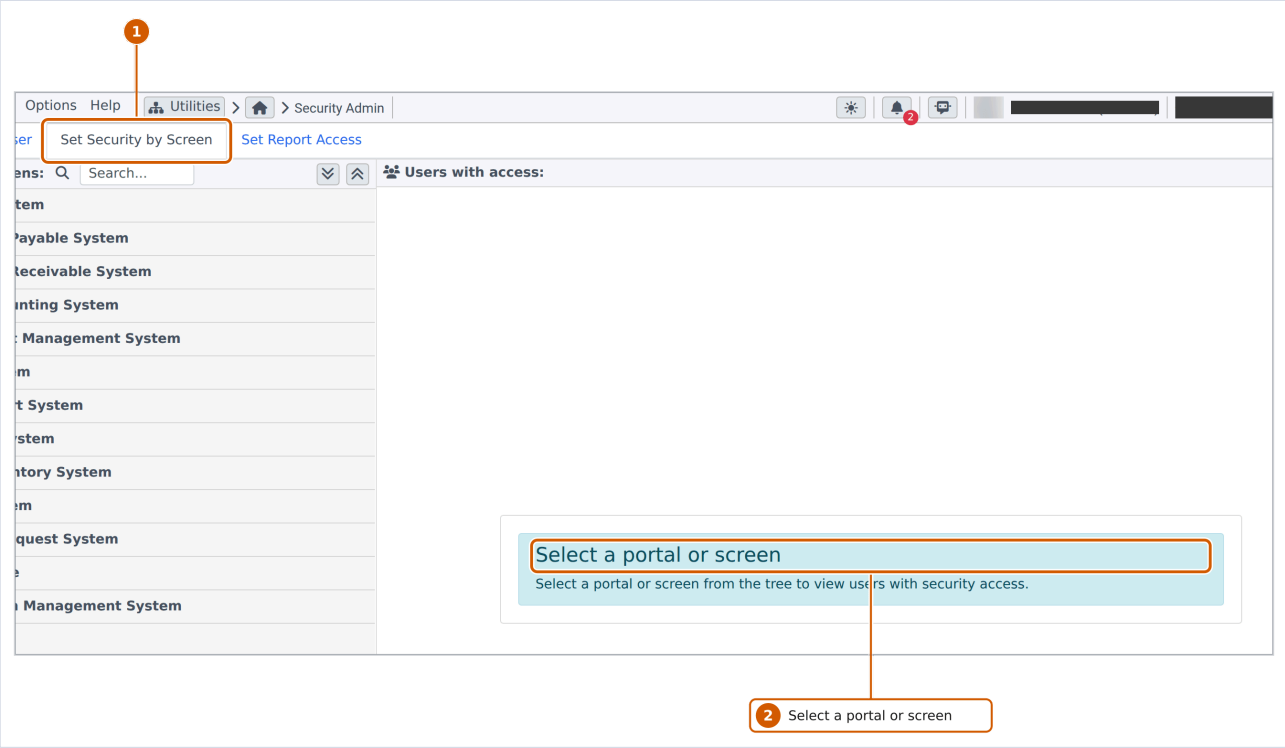
After you select a user, Security pages shows that user's portals with a level and a Delete security override button for each.

1. Expand all
2. Collapse all
3. Delete security override

See and change who has their own level on a portal or screen

1. Click the **Set Security by Screen** tab.

   The tab shows **Portals & screens:** on the left and **Users with access:** on the right, with the prompt "Select a portal or screen".



The Set Security by Screen tab. Choose a portal or screen to see the users who have their own level on it.

1. Set Security by Screen
2. Select a portal or screen

2. Choose a portal or screen in the **Portals & screens:** list.

   Users with access: lists the users who have their own override on that portal or screen, sorted by name. Users who only inherit their level are not listed.

3. To change a listed user's level, choose a new level in that user's **Level** dropdown.

   IRIS asks "Change security level to \<level\> for user: \<name\>?" with **Accept** and **Cancel**.

4. Click **Accept**.

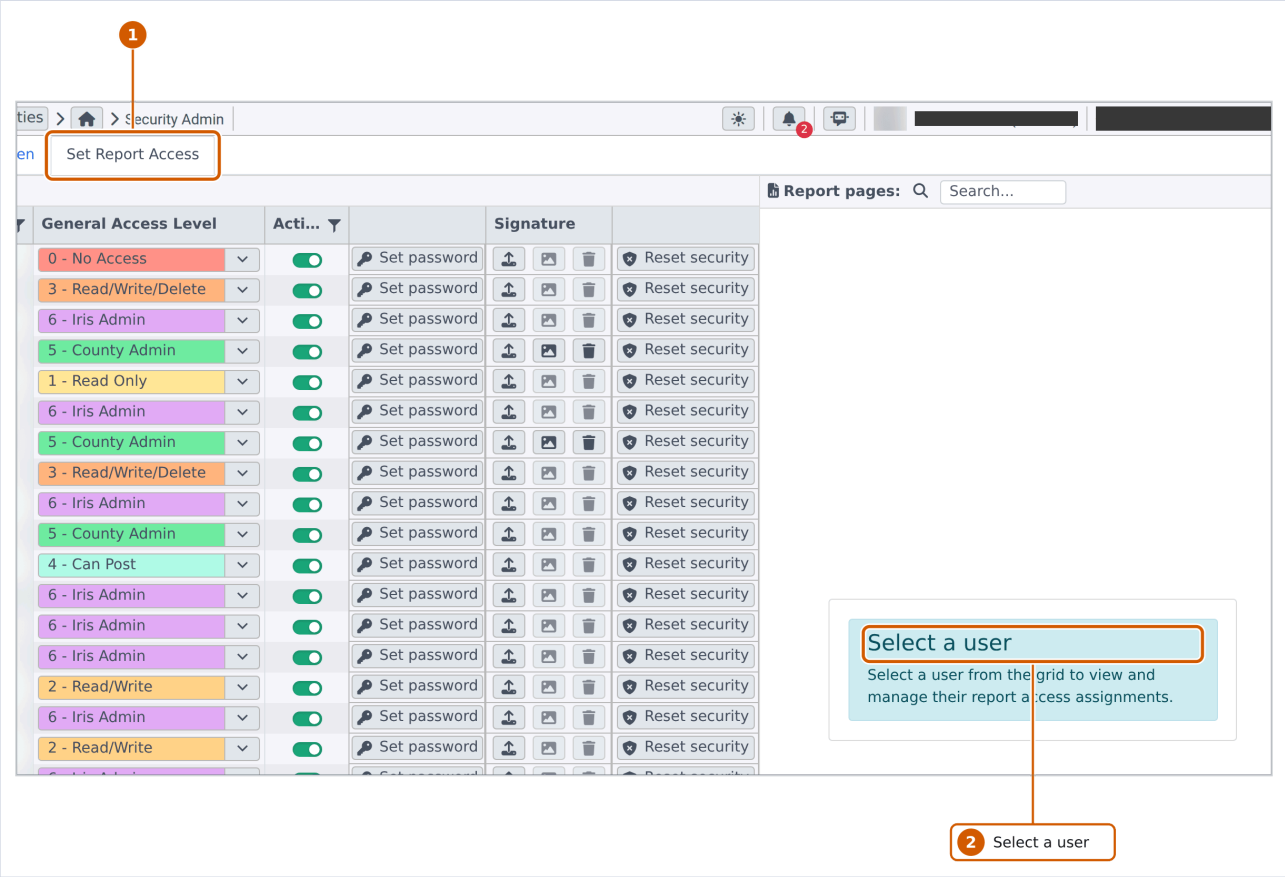
   The user's override on that portal or screen is saved at the new level.

> **Note:** To keep the current level, click **Cancel** instead.

Give or remove a user's access to a report

1. Click the **Set Report Access** tab.

   The tab shows the IRIS users grid and the prompt "Select a user".



The Set Report Access tab uses the same IRIS users grid. Select a user to see their report pages.

1. Set Report Access
2. Select a user

2. Click the user's row.

   Report pages: lists the reports, each with an on/off switch and a **Delete report access override** button. A switch is on when the user has access to that report.

3. Switch a report on to give access, or off to remove access.

   The change is saved at once, with no prompt. Switching on gives read-only access (**1 - Read Only**). Switching off sets the report to **0 - No Access** for that user.

4. To remove the user's own setting for a report so it goes back to the inherited level, click **Delete report access override** next to the report.

   IRIS asks "Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level." with **Yes** and **No**.

5. Click **Yes**.

   The override is removed and the user's access to that report follows the portal level.

> **Note:** To keep the override, click **No** instead.

Remove a security override for a user

1. On the **Set Security by User** tab, click the user's row.

Security pages: shows the user's portals and pages, each with a level dropdown and a **Delete security override** button.

2. Find the portal or page. Use **Expand all** to show every page.

   All portals open to show their pages.

3. Click **Delete security override** next to the portal or page.

   IRIS asks "Are you sure you want to remove the security override for \<item\>? The effective level will revert to the general access level." for a portal, or "... will revert to the portal level." for a page, with **Yes** and **No**.

   > **Note:** You can click the button only when the item has its own override.

4. Click **Yes**.

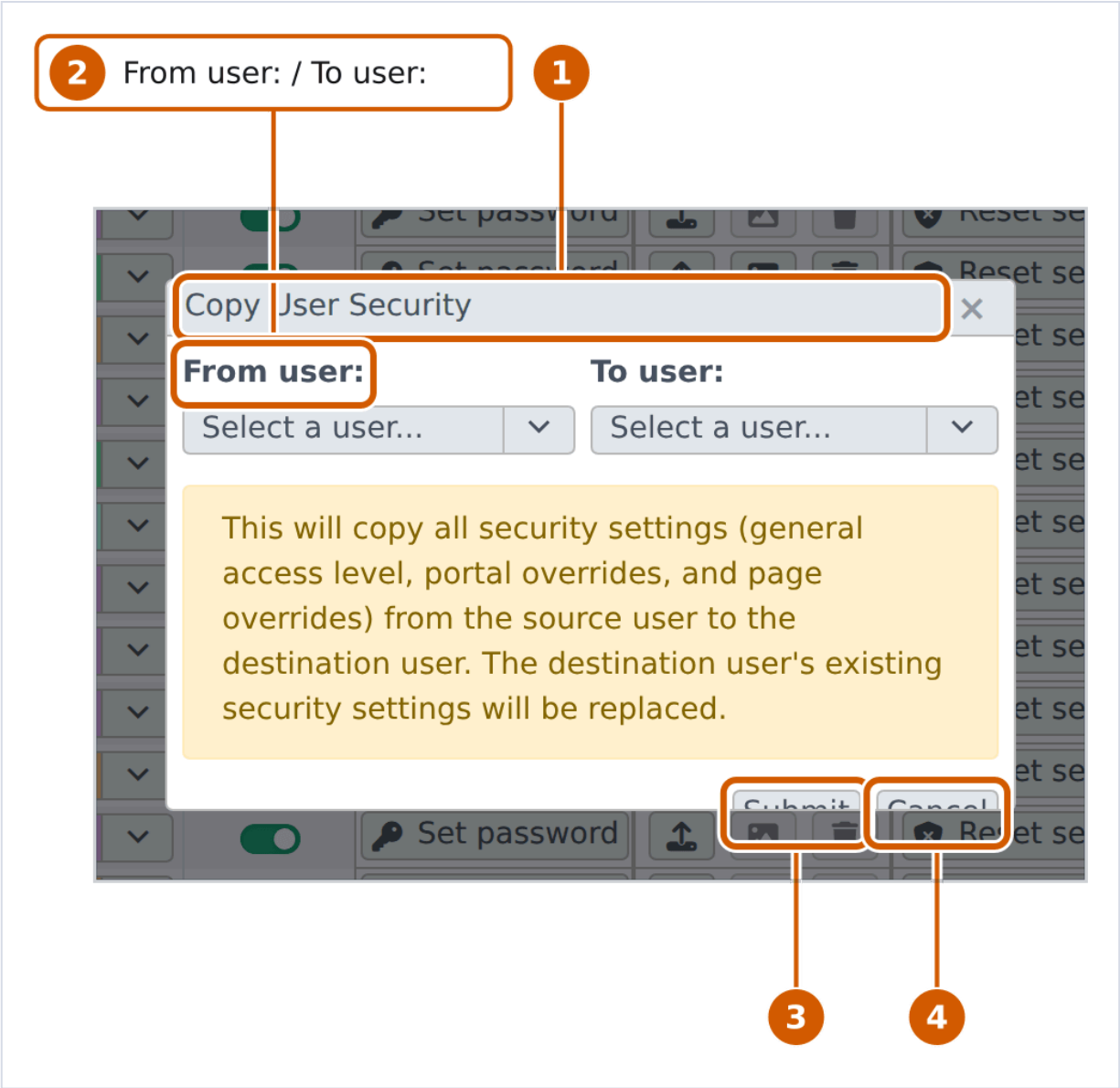
   The override is removed. A portal goes back to the user's General Access Level. A page goes back to the portal level.

   > **Note:** To keep the override, click **No** instead.

Copy security from one user to another

1. On the **Set Security by User** tab, click the **Copy user security data** button above the IRIS users grid.

   The **Copy User Security** window opens with **From user:** and **To user:** lists and **Submit** and **Cancel** buttons.



The Copy User Security window. The To user's existing security settings are replaced, and the copy cannot be undone.

1. Copy User Security
2. From user: / To user:
3. Submit
4. Cancel

2. Read the warning in the window.

   The window states that all security settings (general access level, portal overrides and page overrides) are copied from the source user and that the destination user's existing settings are replaced.

3. In **From user:**, choose the user whose security you want to copy. You can type to filter the list.
4. In **To user:**, choose the user who should receive that security.

> **Note:** The two users must be different. If either list is empty, IRIS shows "Please select both a source and destination user."

5. Click **Submit**.

   The window closes. IRIS shows "\<From\>'s security settings have been copied to \<To\>." The To user now has the From user's General Access Level and all of the From user's portal, page and report-access overrides. All of the To user's previous overrides are gone. This cannot be undone.

> **Note:** To close the window without copying, click **Cancel** instead.

Reset a user's security

1. On the **Set Security by User** tab, find the user in the IRIS users grid and click the **Reset security** button in that user's row.

   IRIS asks "Warning! Are you sure you want to reset the users security settings? This action cannot be undone." with **Yes** and **No**.
2. Click **Yes**.

   All of the user's portal, page and report-access overrides are deleted and the trees reload. The user's General Access Level stays, so the user's access now follows it everywhere. This cannot be undone.

> **Note:** To cancel the reset, click **No** instead.

Make a user active or inactive

1. In the IRIS users grid, click the **Active** switch in the user's row.

   The change is saved at once. If it cannot be saved, the switch goes back to its previous position and, in most cases, an error message appears.

Set a user's password

1. In the IRIS users grid, click the **Set password** button in the user's row.

   The **Set password** window opens. If the user has an email address, it shows **Create New Password** and **Confirm Password**. If the user has no email address, only an email form shows, with the message "The selected user does not have an email address assigned. Please assign an email address to this user before setting a password."

> **Note:** If the email form shows, complete steps 2 to 4 first. Otherwise, go to step 5.

2. Type the user's email address in the **Email Address** box.
3. Click **Submit**.

   IRIS shows "Email updated successfully." If the email cannot be saved, IRIS shows an error message.
4. Click **Ok** on the success message.

The **Create New Password** and **Confirm Password** boxes appear.

5. Type the new password in **Create New Password**.

   The checks below the box update as you type: 8 to 30 characters; **Contains uppercase character**; **Contains a digit**; **Contains special character**; and that the password does not contain `.` `;` `'` or `@`.

6. Type the same password in **Confirm Password**.
7. Click **Submit**.

   IRIS shows "Password updated successfully." If the password cannot be saved, IRIS shows an error message.

Manage a user's signature

1. In the IRIS users grid, use the upload button in the **Signature** column of the user's row to add a signature.
2. To see the signature, click the view button in the **Signature** column.

   > **Note:** View and delete are unavailable when the user has no signature.

3. To remove the signature, click the delete button in the **Signature** column.

   IRIS asks "Are you sure you want to delete the signature for user: \<name\>?"

Reference

Security levels

LEVEL SHOWN IN IRIS	WHAT IT MEANS FOR THE USER
0 - No Access	No access to the portal, page or report.
1 - Read Only	Can open the page and view it. This is also the highest level any report can have.
2 - Read/Write	Adds editing records in grids. Whether **Add** appears depends on each screen's own add level.
3 - Read/Write/Delete	Adds deleting records in grids.
4 - Can Post	Adds menu items such as Post, Approve and Void.
5 - County Admin	Can open Security Administration and manage the county's users.
6 - Iris Admin	System Administrator level, held only by the IRIS development and support team. County administrators should not choose it.

Which level applies to a page

ORDER	LEVEL USED	SHOWN AS SOURCE
1	The user's own override on the page	`page`

ORDER	LEVEL USED	SHOWN AS SOURCE
2	Otherwise, the user's own override on the portal	`portal`
3	Otherwise, the user's General Access Level	`generalaccess`

IRIS users grid

COLUMN OR CONTROL	WHAT IT DOES
Name, **Email**, **Employee**	Identify the user. You can filter these columns.
General Access Level	The user's base level for this county. It applies wherever there is no override.
Active	On/off switch. It saves as soon as you click it.
Set password	Opens the **Set password** window.
Signature	Upload, view and delete buttons for the user's signature.
Reset security	Removes all of the user's overrides after a warning.
Copy user security data (above the grid)	Opens the **Copy User Security** window.

Messages you may see

MESSAGE	WHEN IT APPEARS
You do not have the required security level to access Security Administration.	You open Security Administration with a General Access Level below 5.
Change security level to \<level\> for user: \<name\>?	You change a **Level** on the **Set Security by Screen** tab (**Accept** or **Cancel**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the general access level.	You delete a portal override (**Yes** or **No**).
Are you sure you want to remove the security override for \<item\>? The effective level will revert to the portal level.	You delete a page or report override (**Yes** or **No**).
Please select both a source and destination user.	You click **Submit** in **Copy User Security** without both users.
Source and destination users must be different.	You choose the same user in **From user:** and **To user:**.
\<From\>'s security settings have been copied to \<To\>.	A copy succeeded.
Warning! Are you sure you want to reset the users security settings? This action cannot be undone.	You click **Reset security** (**Yes** or **No**).
Email updated successfully.	You saved an email address in the **Set password** window.
Password updated successfully.	You saved a new password.

MESSAGE	WHEN IT APPEARS
Are you sure you want to delete the signature for user: \ <name\>?	You click the signature delete button.

Tips and notes

Important: Copy User Security replaces the To user's General Access Level and all of their portal, page and report-access overrides with the From user's. The copy cannot be undone, so check both names before you click **Submit**.

Important: Reset security cannot be undone. It removes every override for the user but keeps the General Access Level, so the user's access everywhere then follows that level.

Note: Set Security by Screen lists only users who have their own override on the chosen portal or screen. Users who inherit their level from a portal or their General Access Level are not listed. Use **Set Security by User** to see their level.

Note: Report access is always read only. Turning a report on gives **1 - Read Only**, however high the user's other levels are.

Note: Report access switches and the **Active** switch save as soon as you click them. There is no confirmation prompt.

Tip: Delete security override is available only on items where the user has their own override. If the button is greyed out, the item is inheriting its level.

Note: Security changes, including copies, apply to the county you are signed in to.

Note: Menu and toolbar items that need a higher level than the user has are hidden, not greyed out. For example, Post, Approve and Void need **4 - Can Post**.

Note: 6 - Iris Admin is the System Administrator level for the IRIS development and support team. Do not choose it for county users.

Related topics

- Security Administration: access levels by user
- Navigating portals and pages
- Data grid overview and basics
- Grid filters
- Logging in

User defined fields

Overview

Each form (screen) has ten user fields. You name and type them in the User Defined Fields window. The label you set becomes the column heading, editor label and filter name wherever the field appears. Grid column headings and editor labels are described in Grid viewing and editing. Filter names are described in Grid filters.

Before you begin

- Sign in to IRIS10.
- Make sure you have access to the User Defined Fields screen in the Utilities portal. To reach the Utilities portal, see Navigating portals and pages.
- Make sure you have edit access to User Defined Fields if you need to save changes. Access to view and edit User Defined Fields is granted as described in Security Administration: access levels by user.
- To use a user-defined lookup value list as the source for a Lookup field, see Lookup values.

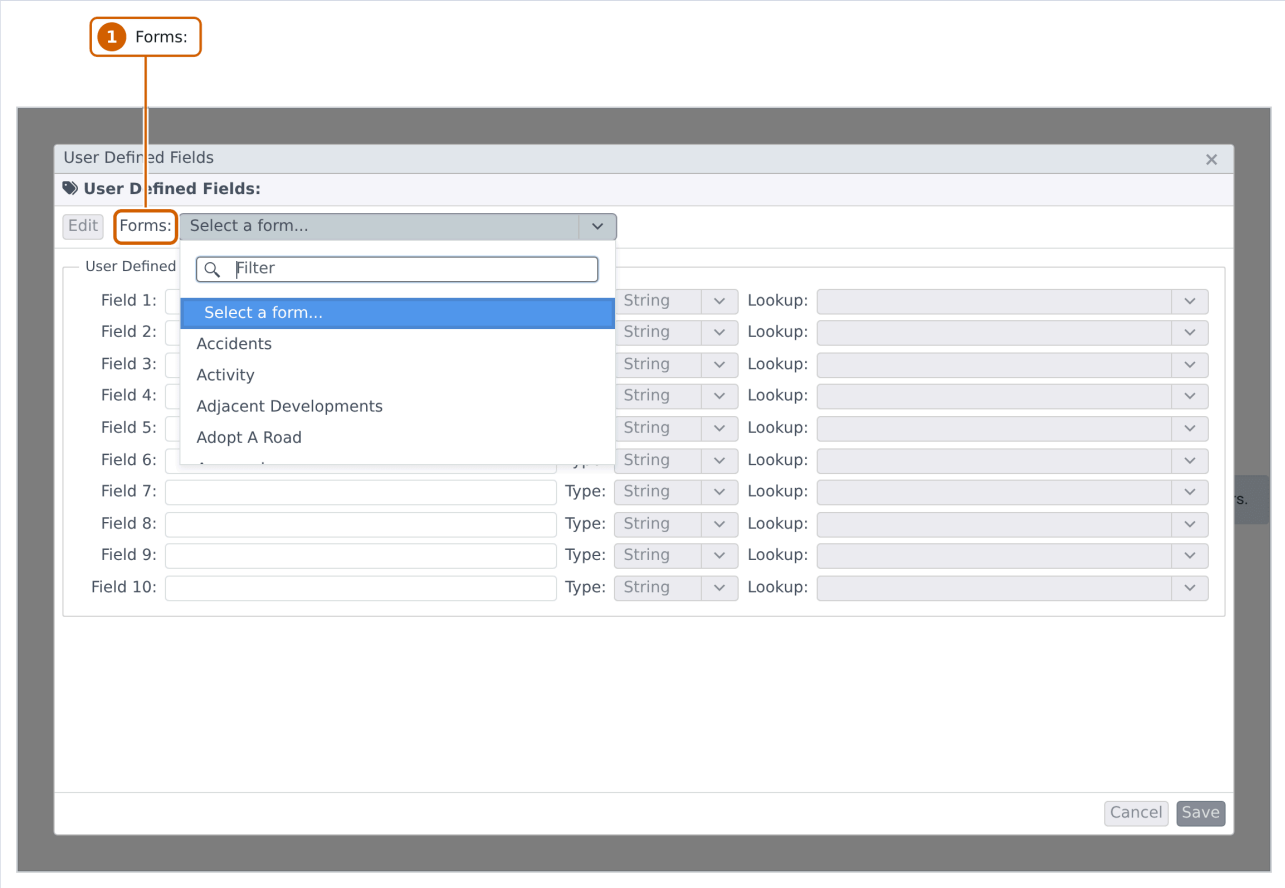
Procedure

Open the User Defined Fields window

1. In the Utilities portal, open the User Defined Fields screen. The screen shows the text "Name and type the ten user fields available on a screen...", and the User Defined Fields window opens by itself.
2. If you closed the window, click **Manage User Defined Fields**. The User Defined Fields window opens again with the form you chose last time, so **Edit** may already be available.

View the user fields for a form

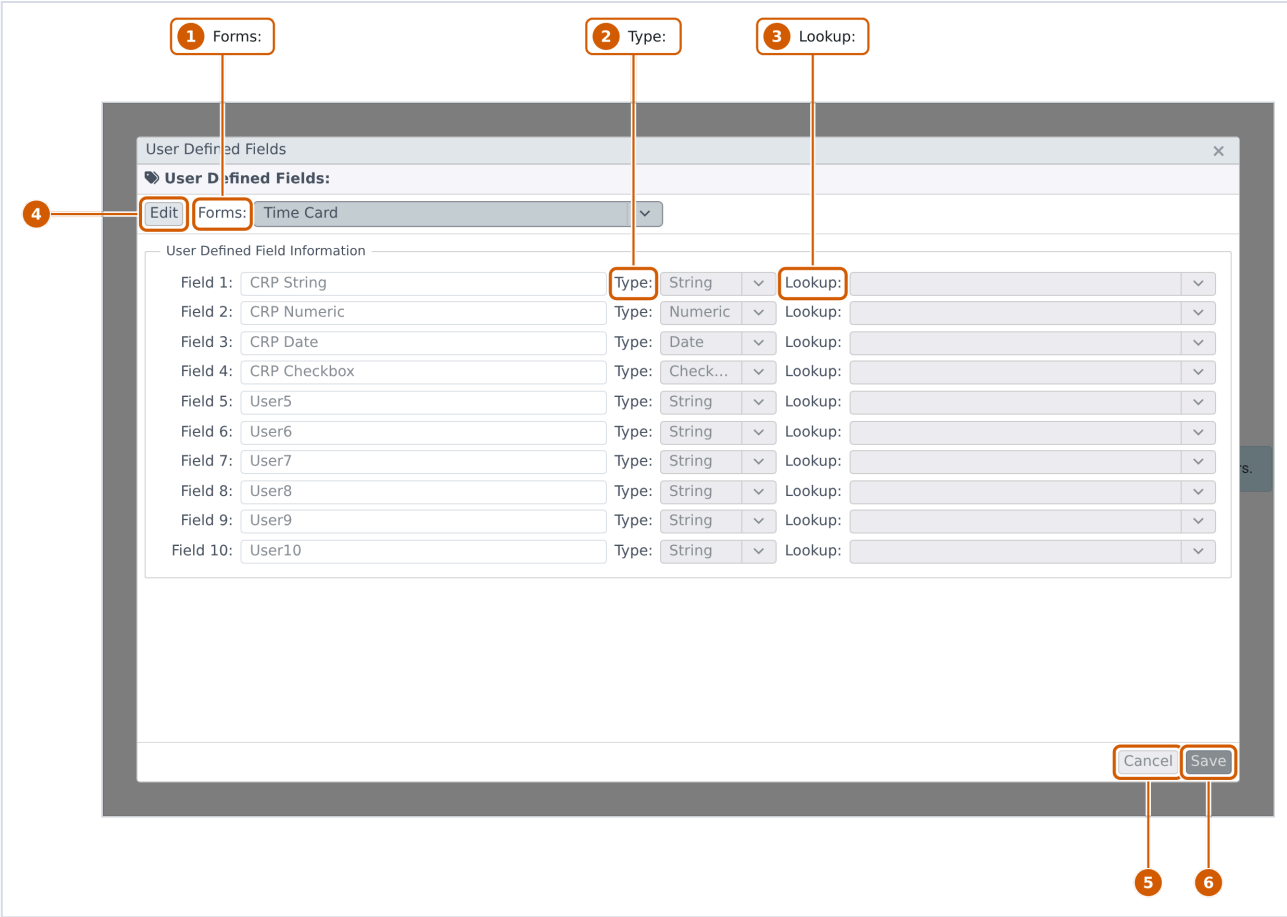
1. In the window, click the **Forms:** list. The list opens. Before you choose anything, it shows `Select a form...`.



The Forms: list includes every screen that has user fields, sorted alphabetically. Type to filter it.

1. **Forms:** Type part of a name to filter the list.

2. Type part of the screen name to filter the list, then choose the form. The list shows only the forms whose names contain what you typed.
3. Review the ten rows, **Field 1:** to **Field 10:**, each with a label, a **Type:** and a **Lookup:**. The form's saved labels, types and lookups appear read-only. **Edit** becomes available, but **Cancel** and **Save** stay unavailable.



The User Defined Fields window with the Time Card form chosen. Each of the ten fields shows its label, Type: and Lookup:. Click Edit to make changes.

1. **Forms:** Choose the screen whose user fields you want to see.
2. **Type:** String, Numeric, Date, Checkbox or Lookup.
3. **Lookup:** Available only when the type is Lookup.
4. **Edit**
5. **Cancel**
6. **Save**

Name and type user fields

1. Choose the form in **Forms:**. The form's fields load and **Edit** becomes available.
2. Click **Edit**. The label and **Type:** boxes become editable, **Cancel** and **Save** become available, and you can't change the **Forms:** list until you save or cancel.

> **Note:** Users with view-only access can also click **Edit**, but they can't save their changes (see step 7).

3. In the box next to **Field N:**, type the label you want users to see. A label can be up to 30 characters. Leading and trailing spaces are removed when you save.
4. Choose the field's type in **Type:**. If the new type is different from the field's stored type, a warning says existing values may become unreadable and won't be converted. On a form

that has never been set up, every field is stored as String, so any other type shows the warning.

5. If the type is Lookup, choose the list of values in **Lookup:**. Type to filter the list. **Lookup:** is available only for that row while its type is Lookup. If you change the type to anything else, the lookup is cleared.
6. Repeat steps 3 to 5 for each field you want to change.
7. Click **Save**. A success message says grids and filters will show the new labels the next time a screen is loaded. The window then reloads the form and returns to read-only. A label left blank is saved as `User` plus the field number (for example `User3`).

> **Note:** If the save fails, including when you have view-only access, `The user defined fields could not be saved.` appears.

Cancel changes

1. While editing, click **Cancel**. Your unsaved changes are discarded, the last loaded labels, types and lookups come back, and the window returns to read-only.

Reference

Field types

TYPE	NOTES
String	Text. On a form that has never been set up, every field is String.
Numeric	Numbers.
Date	Dates.
Checkbox	A checkbox (yes or no).
Lookup	The value comes from the list chosen in **Lookup:**. This is the only type that keeps a lookup.

Lookup sources

SOURCE	WHAT USERS CAN PICK
IRIS10 lookup tables (listed by description)	Active records only
User-defined lookup value lists (listed by list name)	The values in that list, with a blank first entry

Defaults for a form with no saved setup

FIELD	DEFAULT LABEL	DEFAULT TYPE
Field 1: to **Field 10:**	`User1` to `User10`	String

Button states

SITUATION	EDIT	CANCEL	SAVE	FORMS:
No form chosen	Unavailable	Unavailable	Unavailable	Available
Form chosen (read-only)	Available	Unavailable	Unavailable	Available
Editing	Unavailable	Available	Available	Locked

Messages

MESSAGE	WHEN IT APPEARS
`Unable to load the User Defined Fields window.`	The window's contents couldn't load.
`Could not load the user defined fields for <name>.`	The chosen form's setup couldn't load. The message shows the screen's internal name, not its display name.
`The user defined fields could not be saved.`	Any failed save, including when you have view-only access. It isn't only a connection problem. The message may add `IRIS Support has been notified.` or more detail about the error.

Tips and notes

Important: If you change a field's type to something other than its stored type, existing values aren't converted and may become unreadable. On a form that has never been set up, every field is stored as String.

Note: New labels appear in grids and filters the next time a screen is loaded. Reopen any screen that is already open to see them.

Tip: A form doesn't need to be set up already to appear in **Forms:**. Every screen that has user fields is listed, sorted alphabetically.

Note: If you leave a label blank, IRIS10 saves it as `User` plus the field number (for example `User3`).

Tip: The window remembers the last form you chose, so when you reopen it, that form is already loaded.

Related topics

- Grid viewing and editing
- Grid filters
- Lookup values

- Security Administration: access levels by user
- Navigating portals and pages

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.

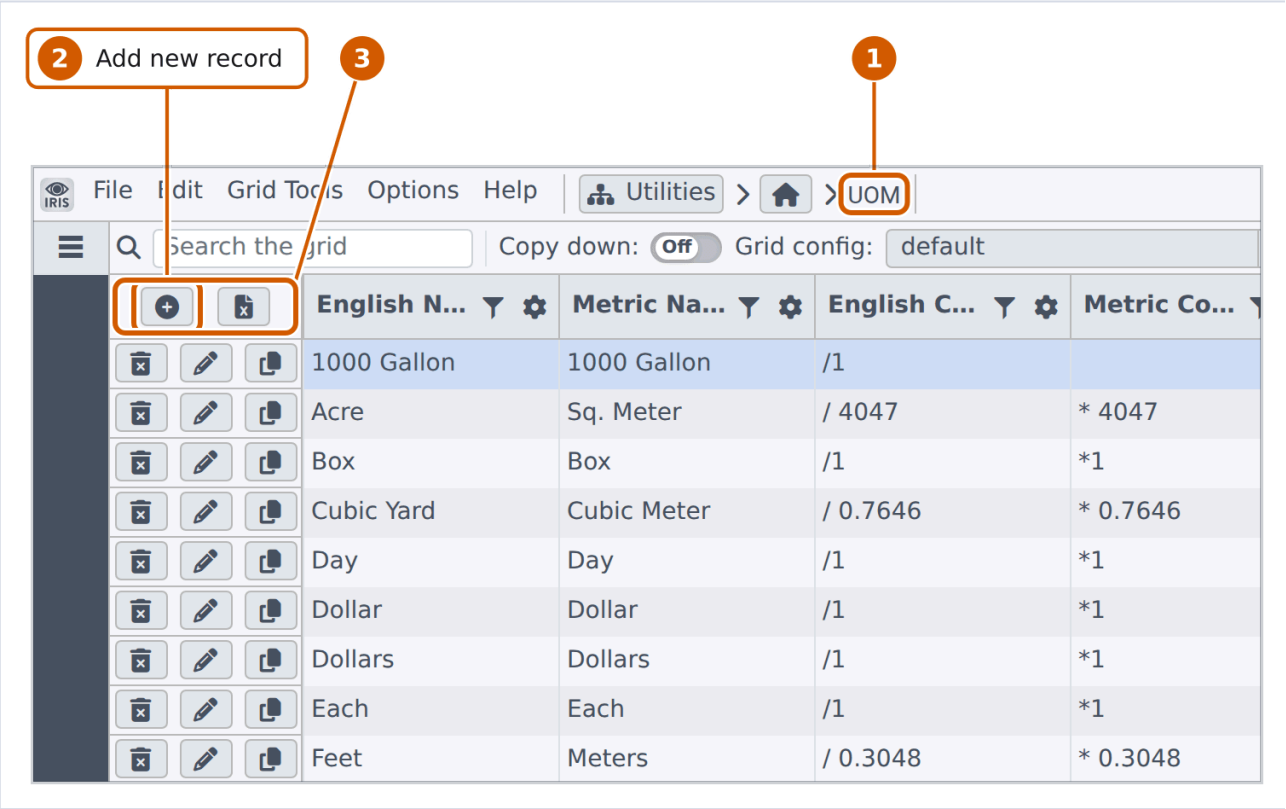
Procedure

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.



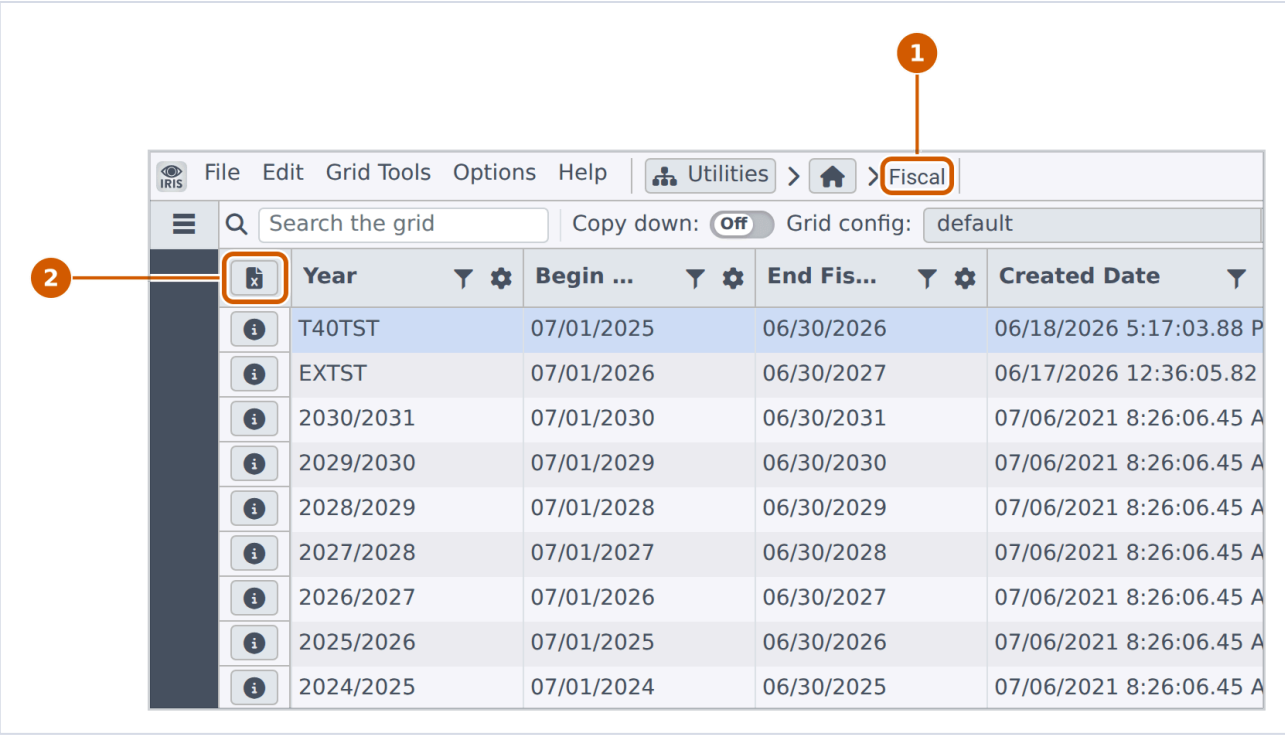
The UOM screen lists units of measure by English Name. Use Add new record to create a new unit.

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.

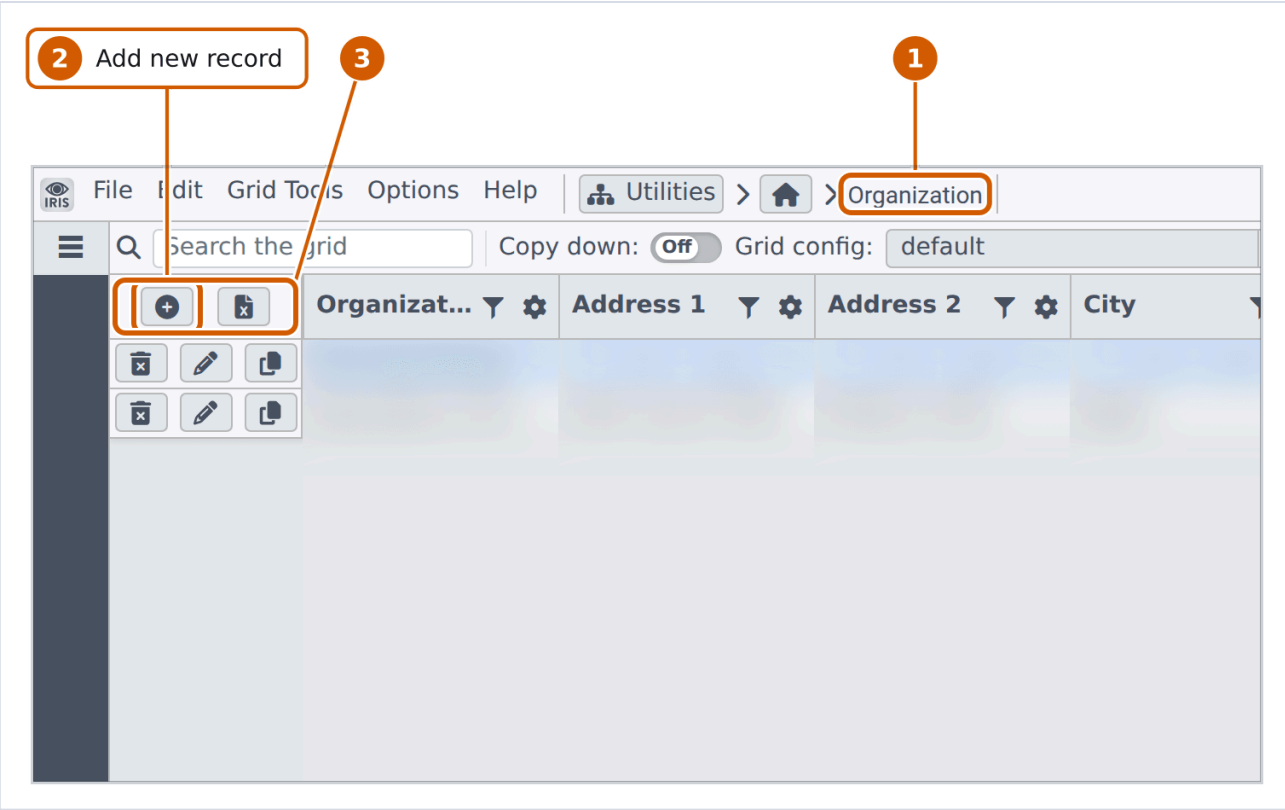
1. Screen header: Fiscal
2. Year, Begin Fiscal and End Fiscal columns

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.

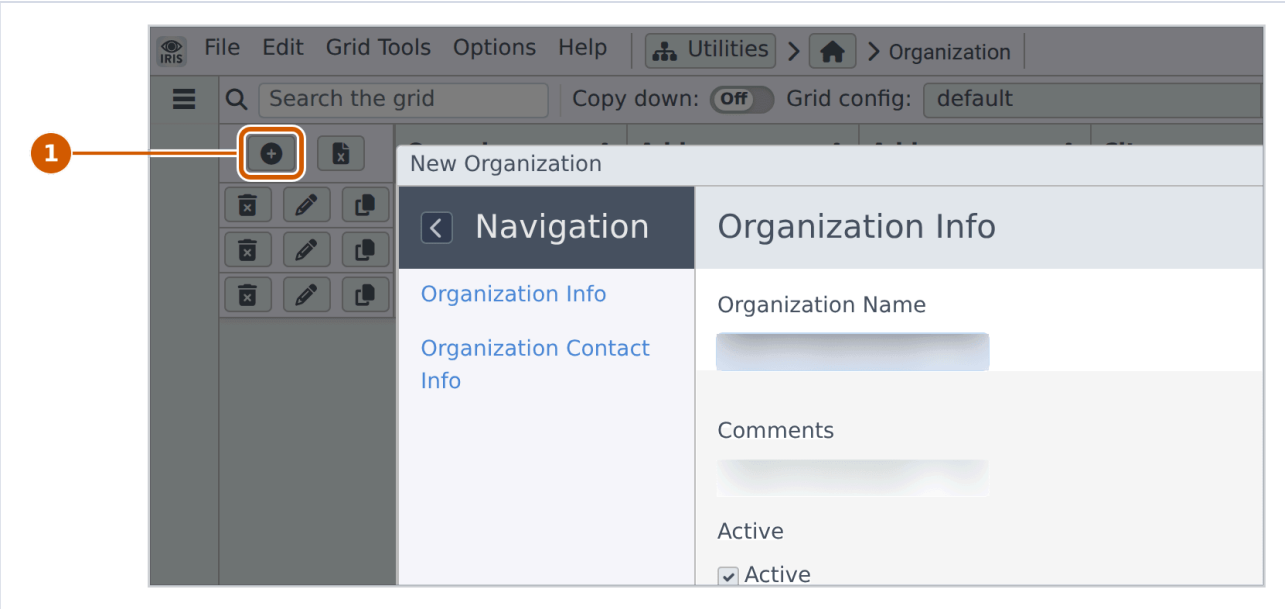
> **Note:** Organizations are covered by the Utilities security area. If you cannot see the menu item or the add button, ask your administrator about your access.



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