Grid configurations

Overview

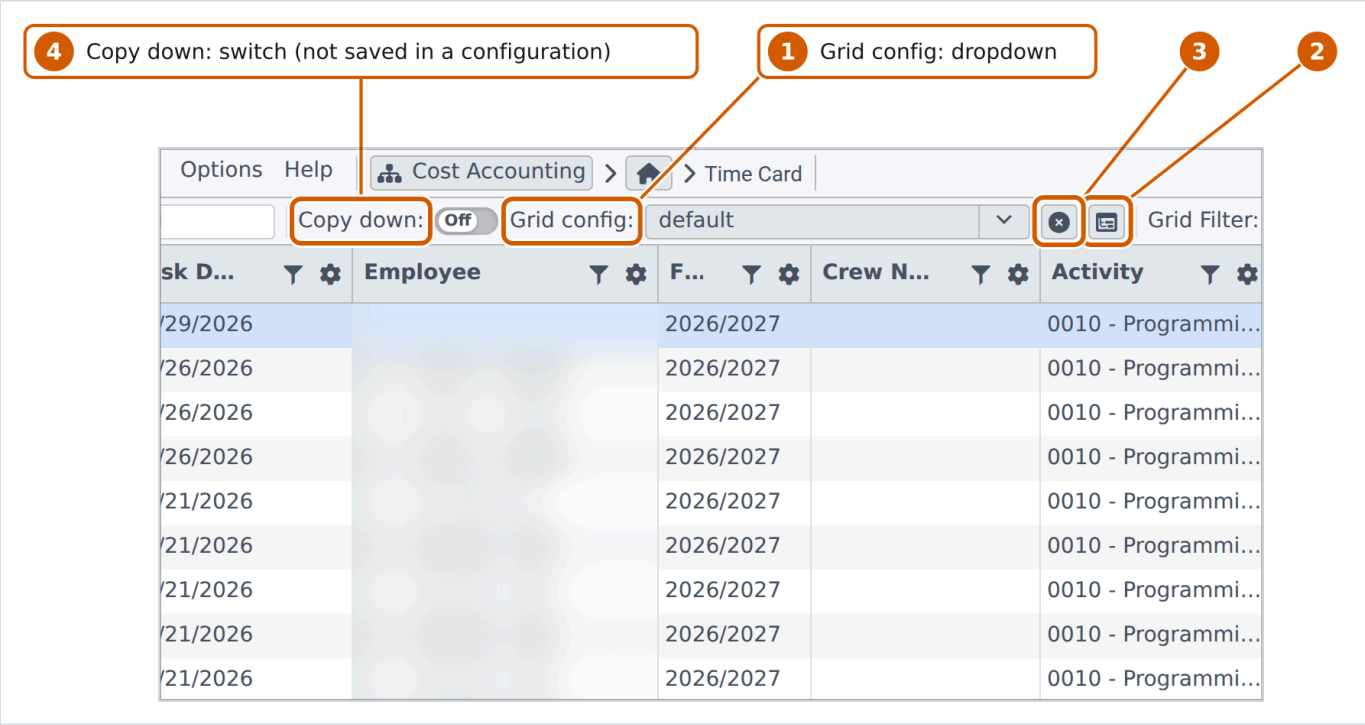
You use a Grid configuration to save a named column layout for one screen. A Grid configuration belongs to one user. Your Grid configuration holds these settings:

- 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.

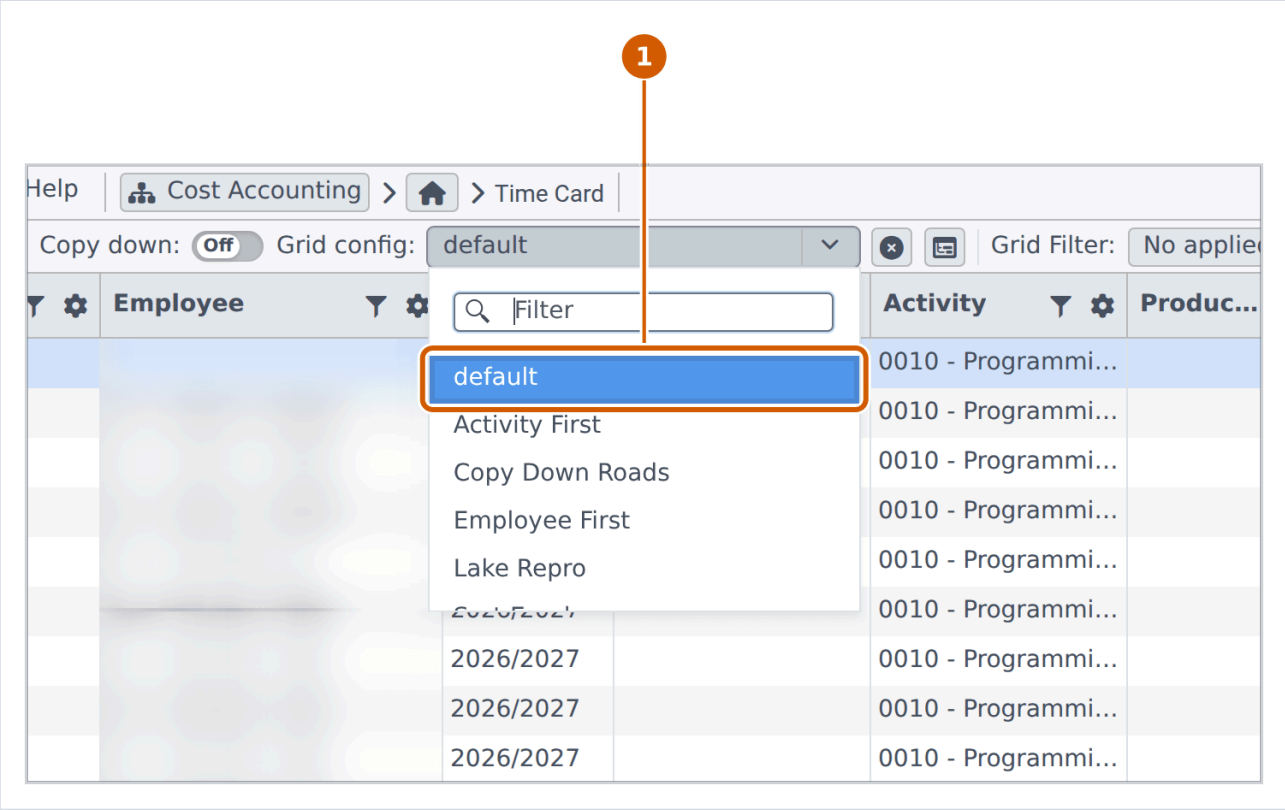
Before you begin

- 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.

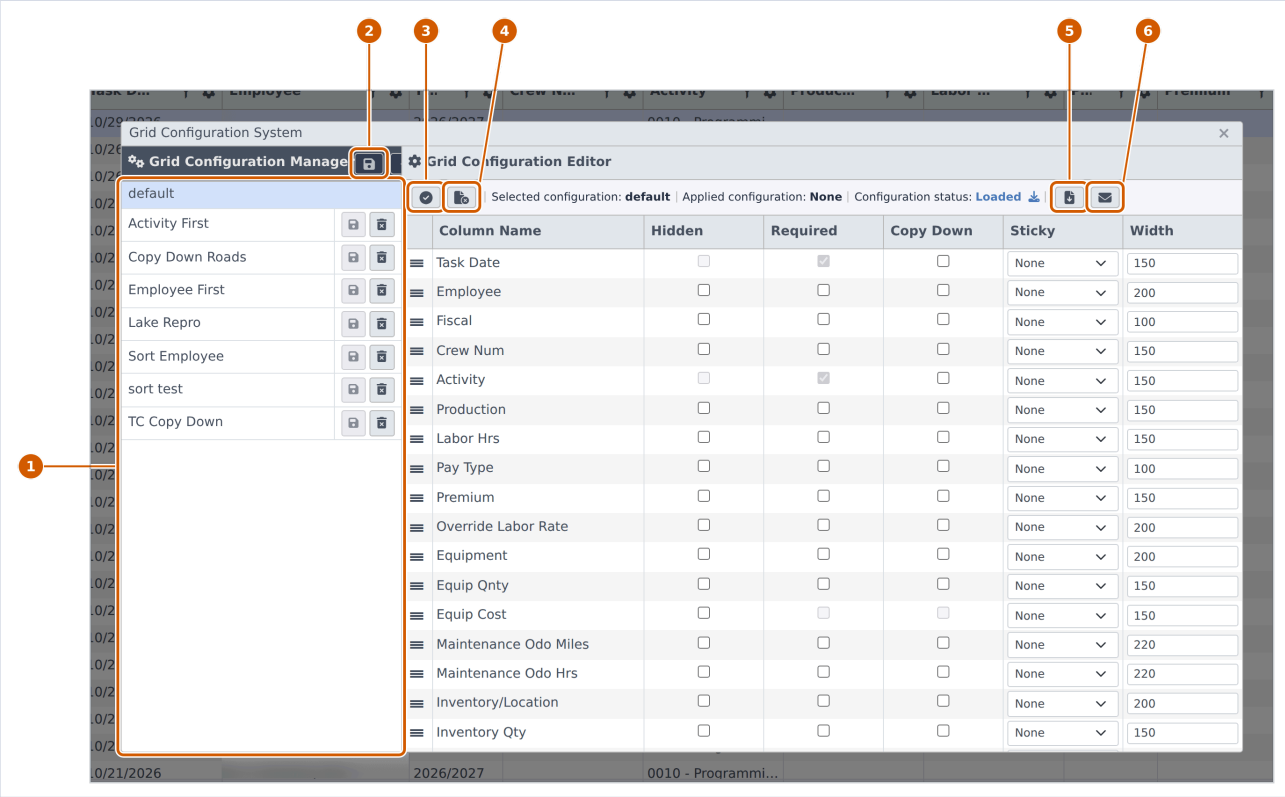
1. 'default' and your saved configurations
2. Optional: to narrow a long list, type part of the name into the **Filter** box.
3. Click the configuration you want. The configuration is applied to the grid.
4. If you have unsaved changes, IRIS10 asks, "Changing grid configs will discard unsaved changes.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

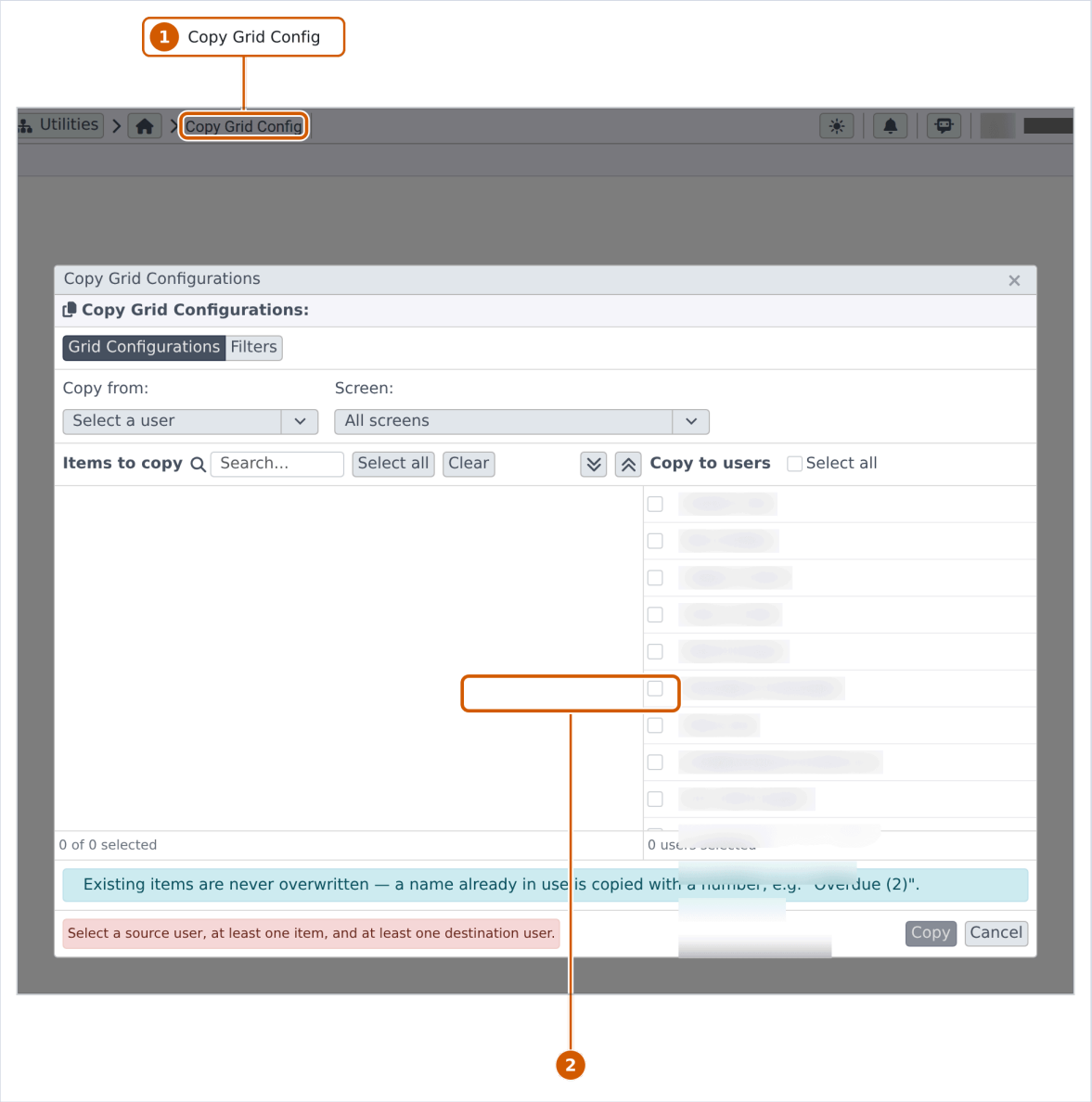
   The grid resets to the default configuration.

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