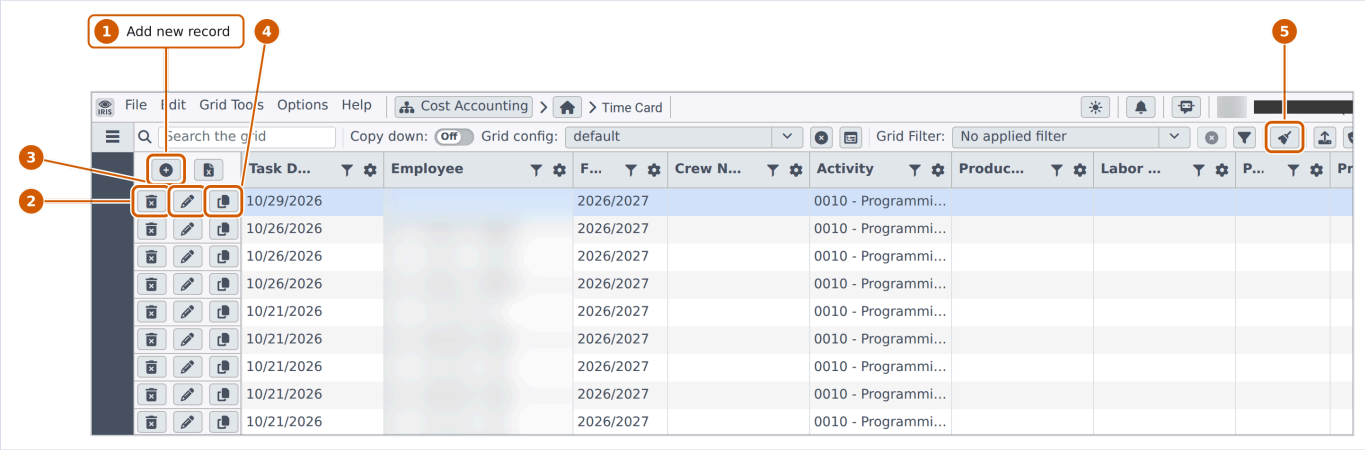
Grid viewing and editing

Overview

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

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



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

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

With this page you can:

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

Before you begin

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

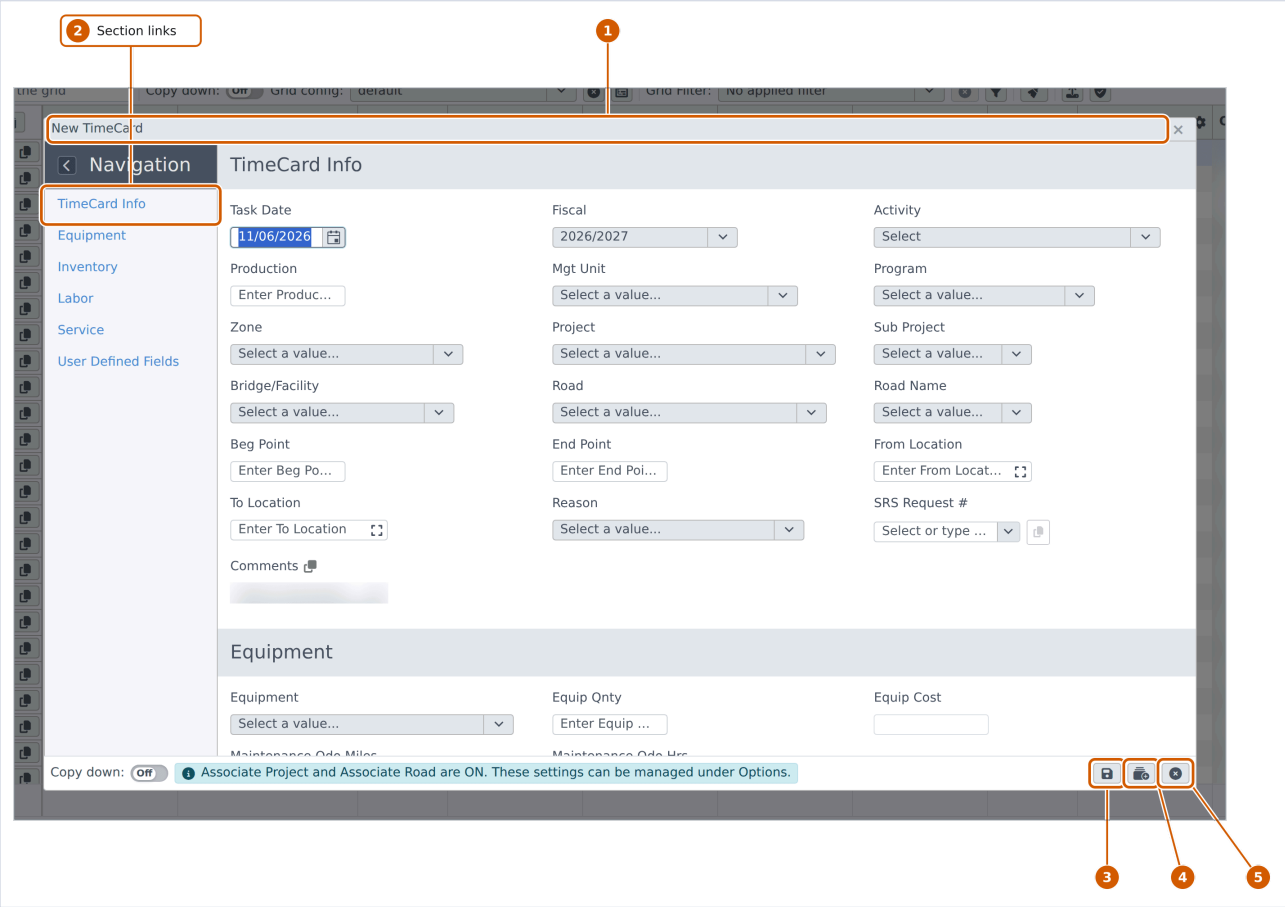
- Check your security access. The Add, Edit, Duplicate, and Delete buttons appear only if your security access for the screen allows those actions. If a button is missing, ask your IRIS10 administrator.

Procedure

Add a new record

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

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



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

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

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

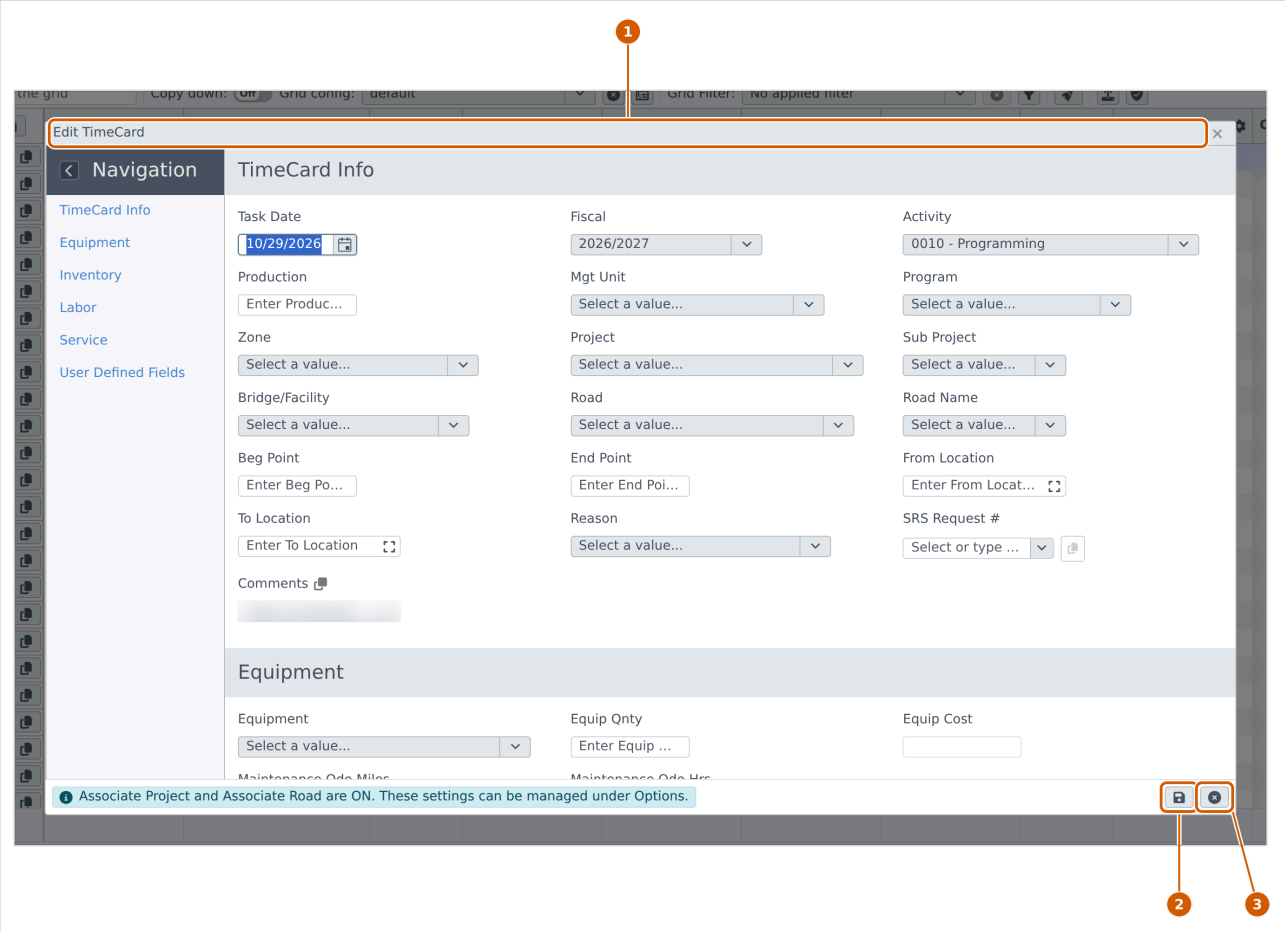
> **Note: Save and Add New** is shown only when you are adding a new record.

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

Edit a record

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

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



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

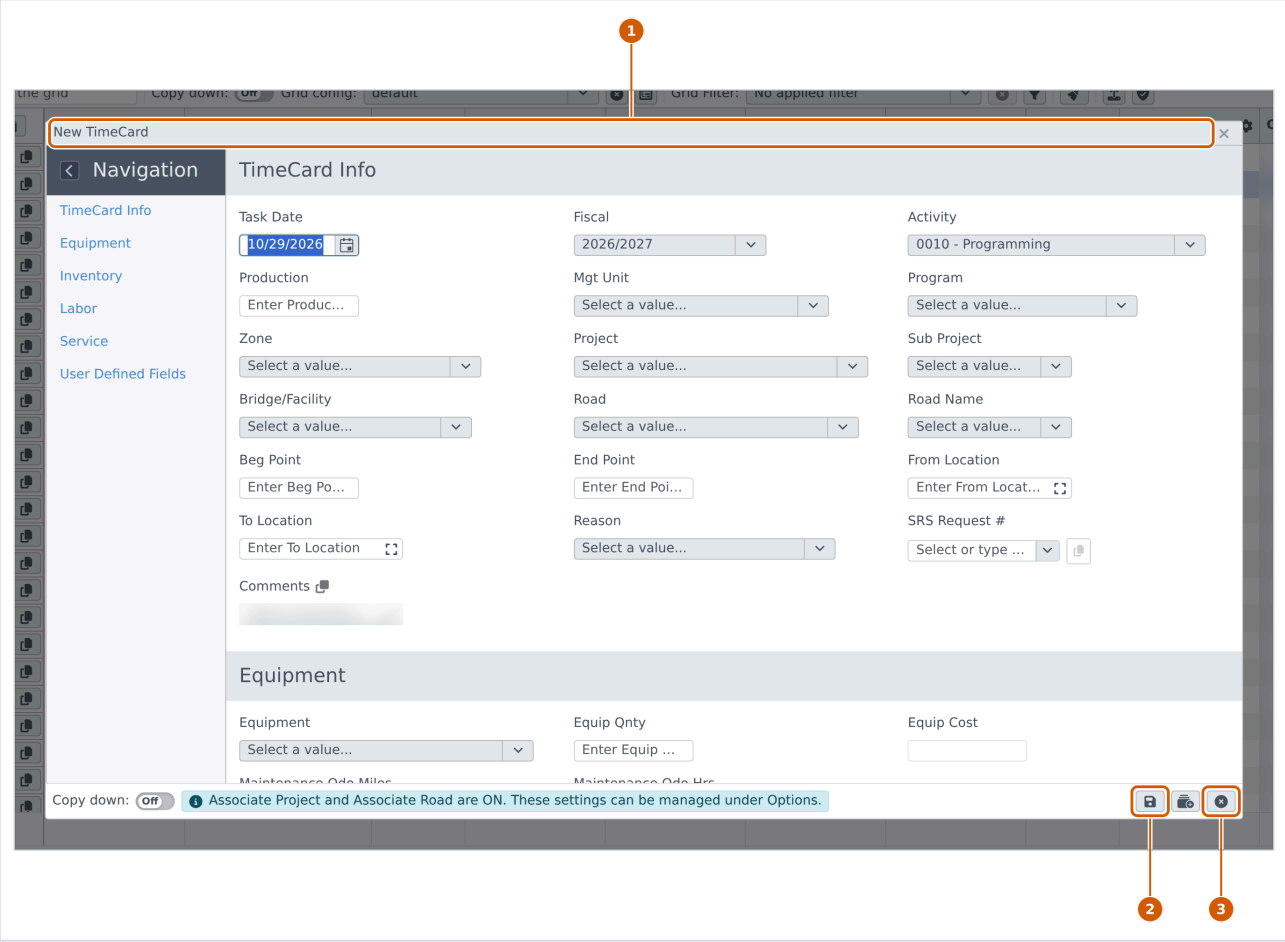
1. Edit TimeCard
2. Save
3. Cancel

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

Duplicate a record

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

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



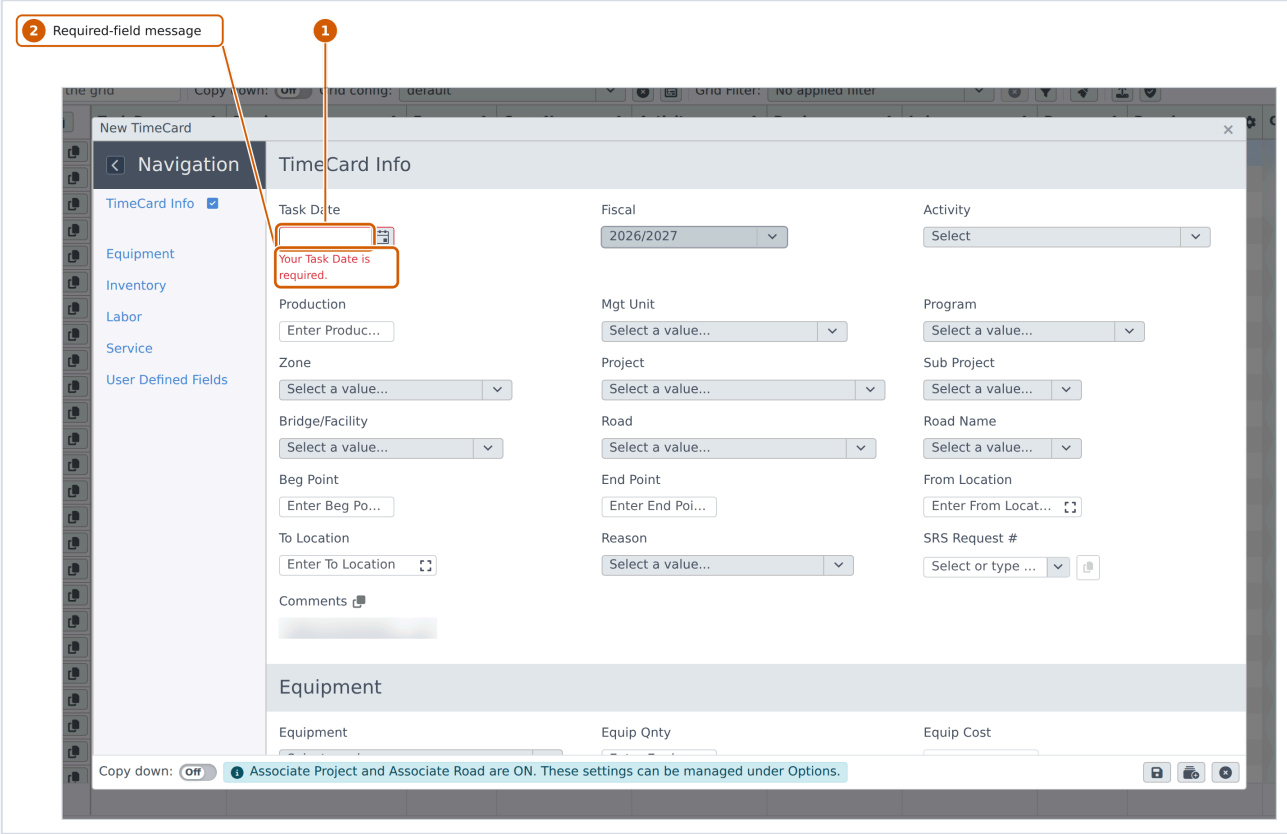
Duplicate record opens a New TimeCard window.

1. New TimeCard
2. Save
3. Cancel

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

Fix a required-field message

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



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

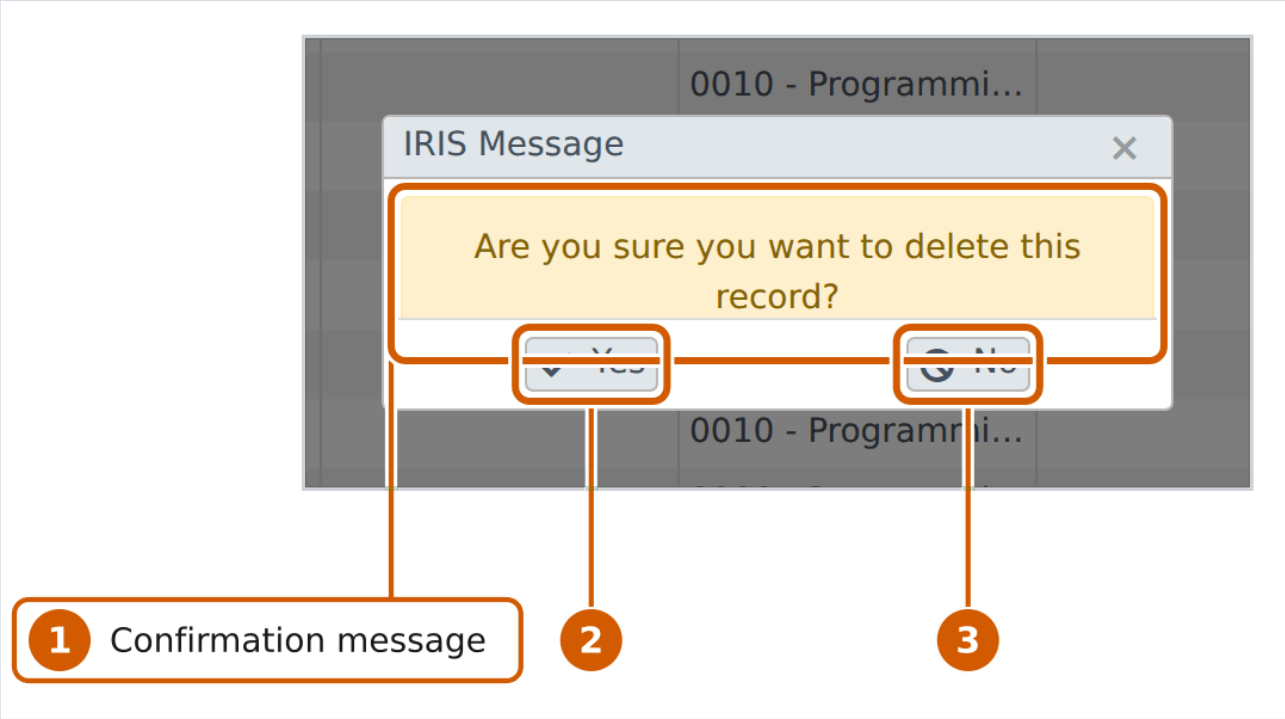
1. Required field left empty
2. Required-field message

3. Enter a value in the field.

Delete a record

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

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



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

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

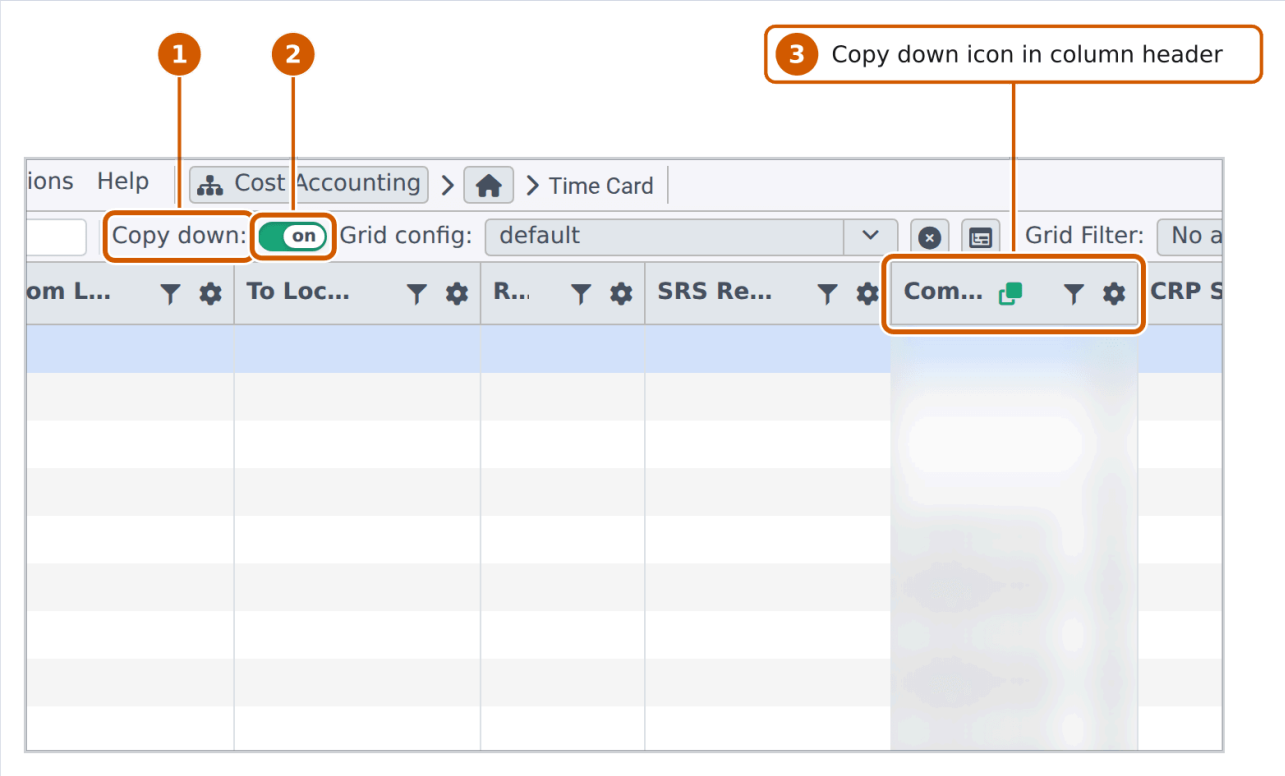
2. Click **Yes** to delete the record.
3. To keep the record, click **No**.

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

Use Copy Down to enter a series of similar records

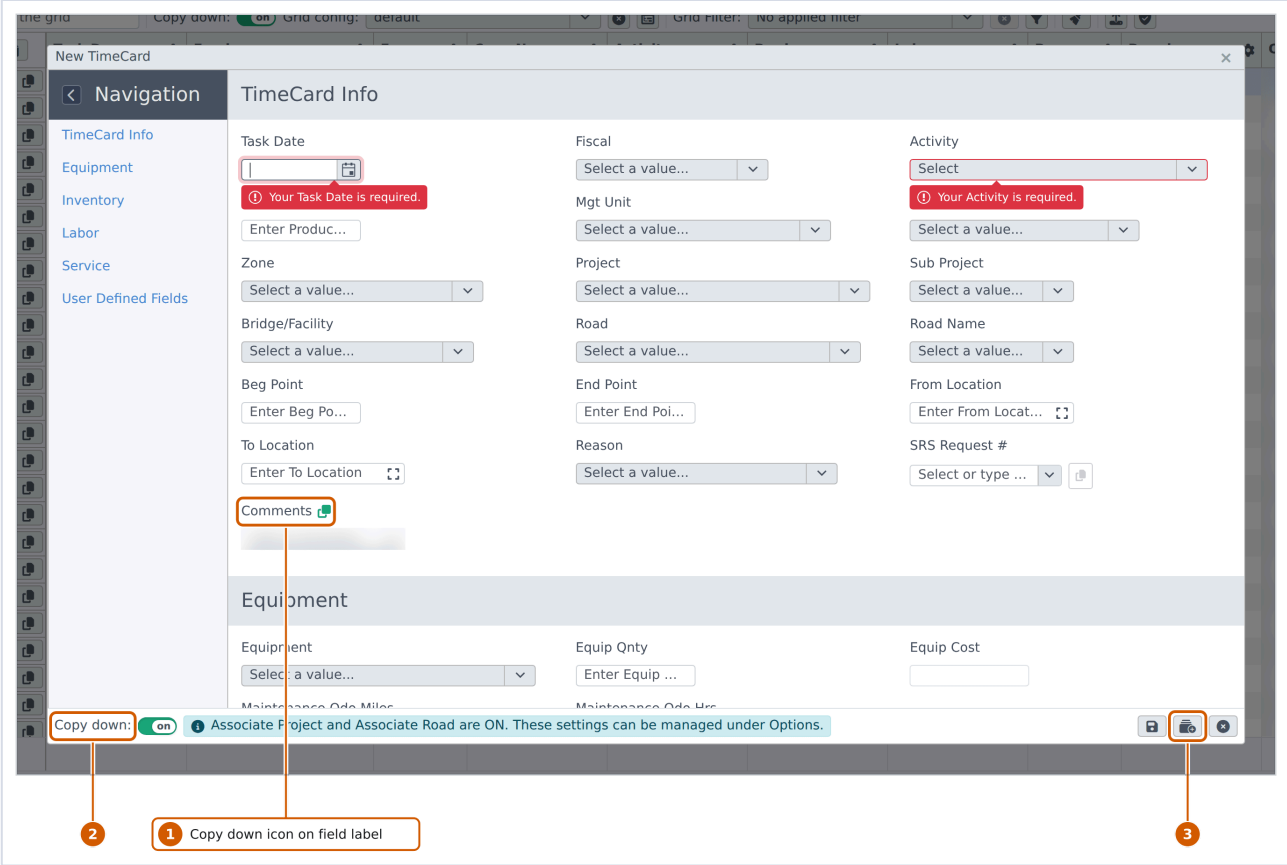
When **Copy down:** is on, adding a new record fills the fields set to Copy down from the selected row, so you only have to make additions or edits to the new record.

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



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

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



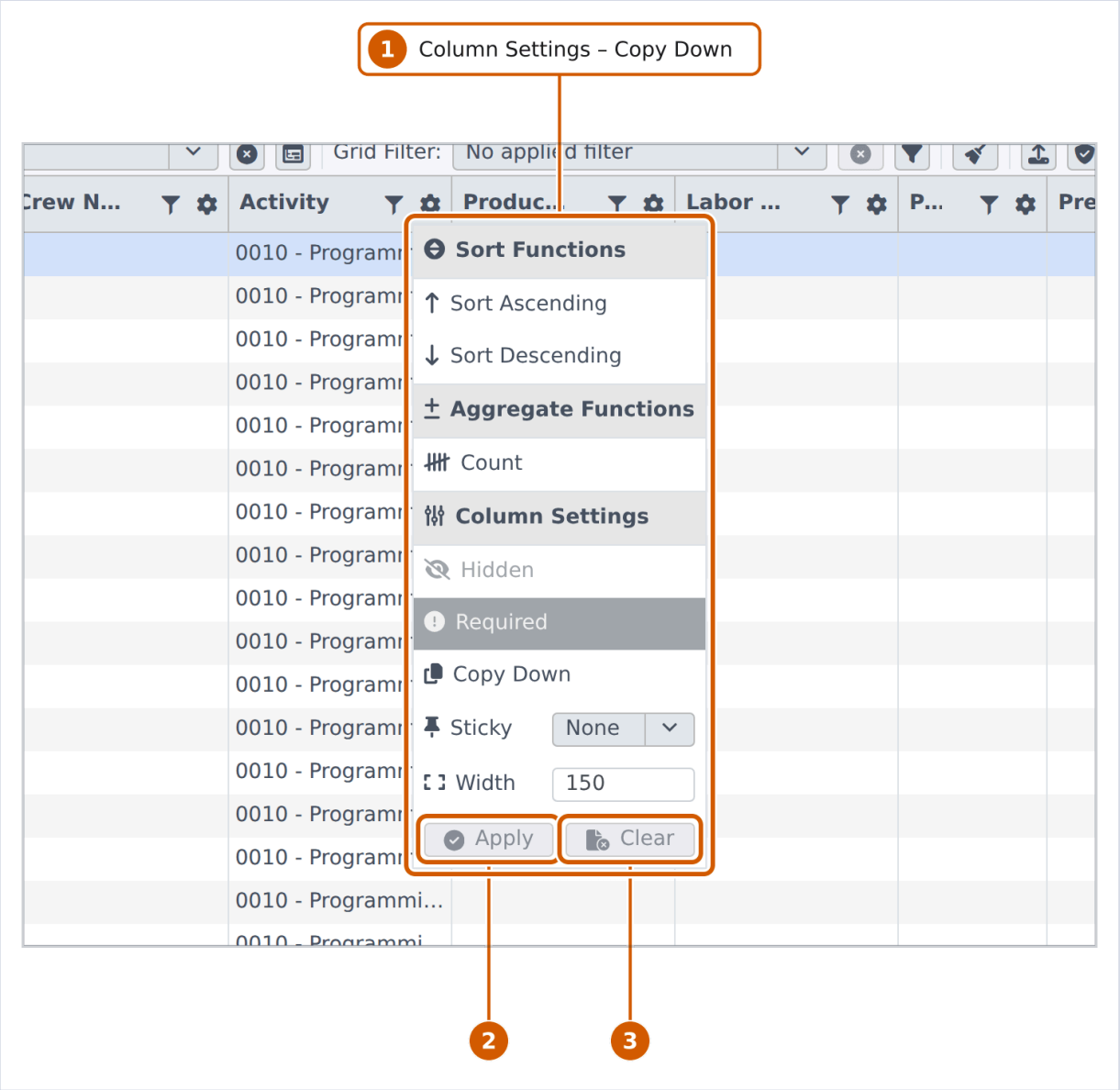
The New TimeCard window opened with Copy Down on. The Copy down icon on a field label marks a field that copies, and the window has its own Copy down switch.

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

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

Choose which columns Copy Down

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



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

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

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

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

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

Other editing styles

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

Reference

Grid editing buttons

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

Pop-up editor buttons

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

What Copy Down copies

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

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

Tips and notes

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

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

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

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

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

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

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

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

Related topics

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