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

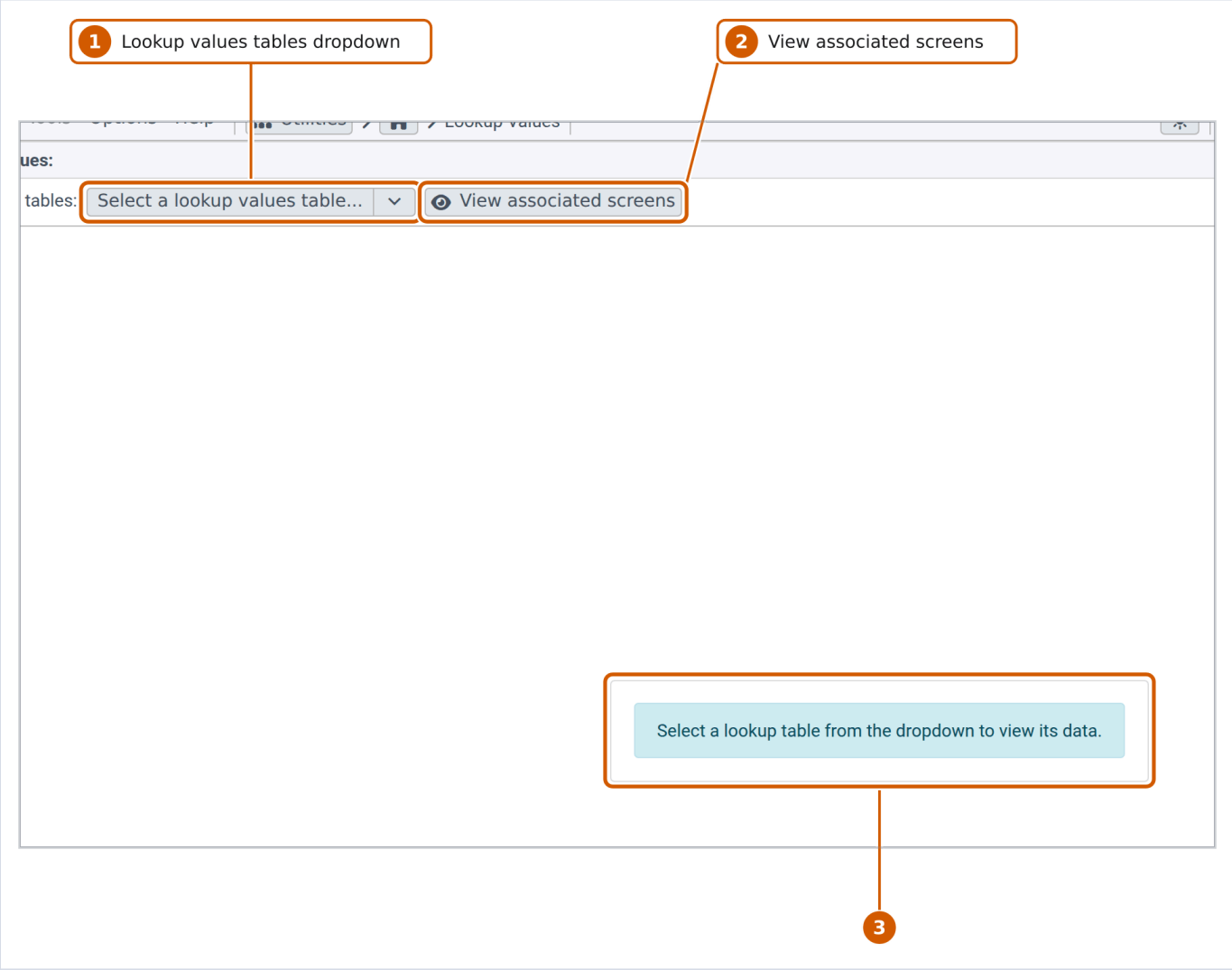
1. Open the screen from the portal you are working in:

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.

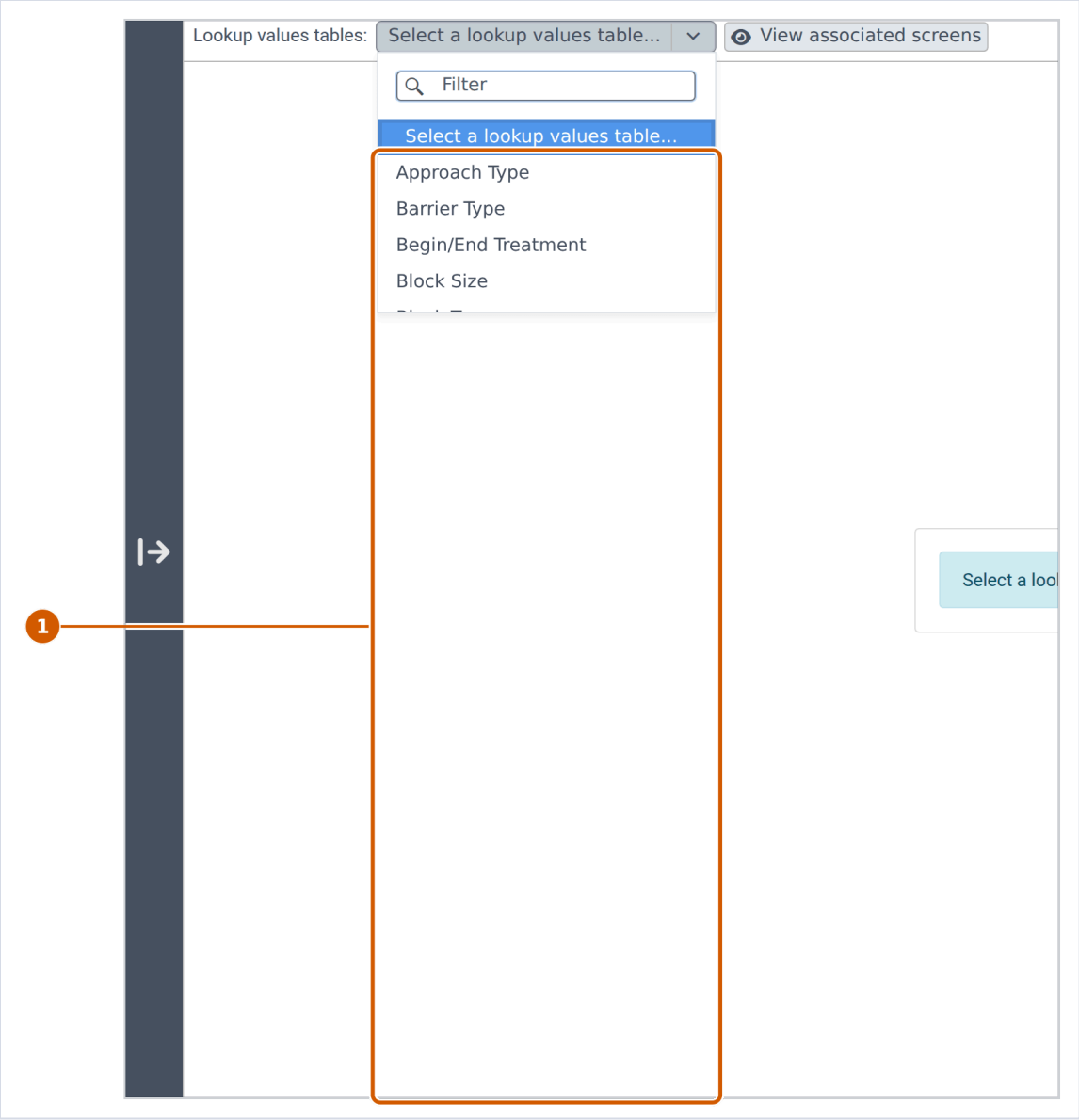
1. Lookup values tables dropdown
2. View associated screens
3. Shown until a table is chosen

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.

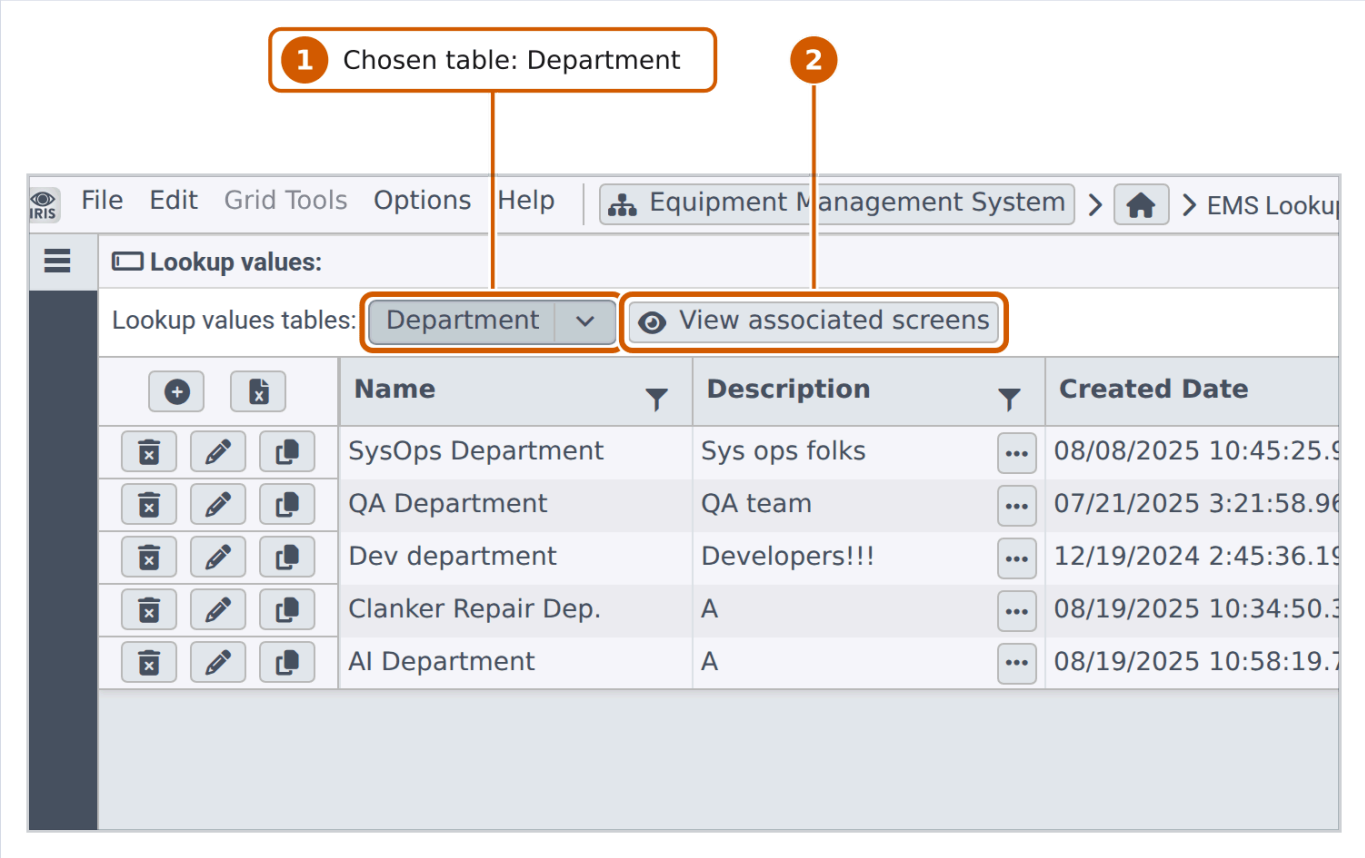


In Utilities, the dropdown lists every lookup table in alphabetical order.

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.

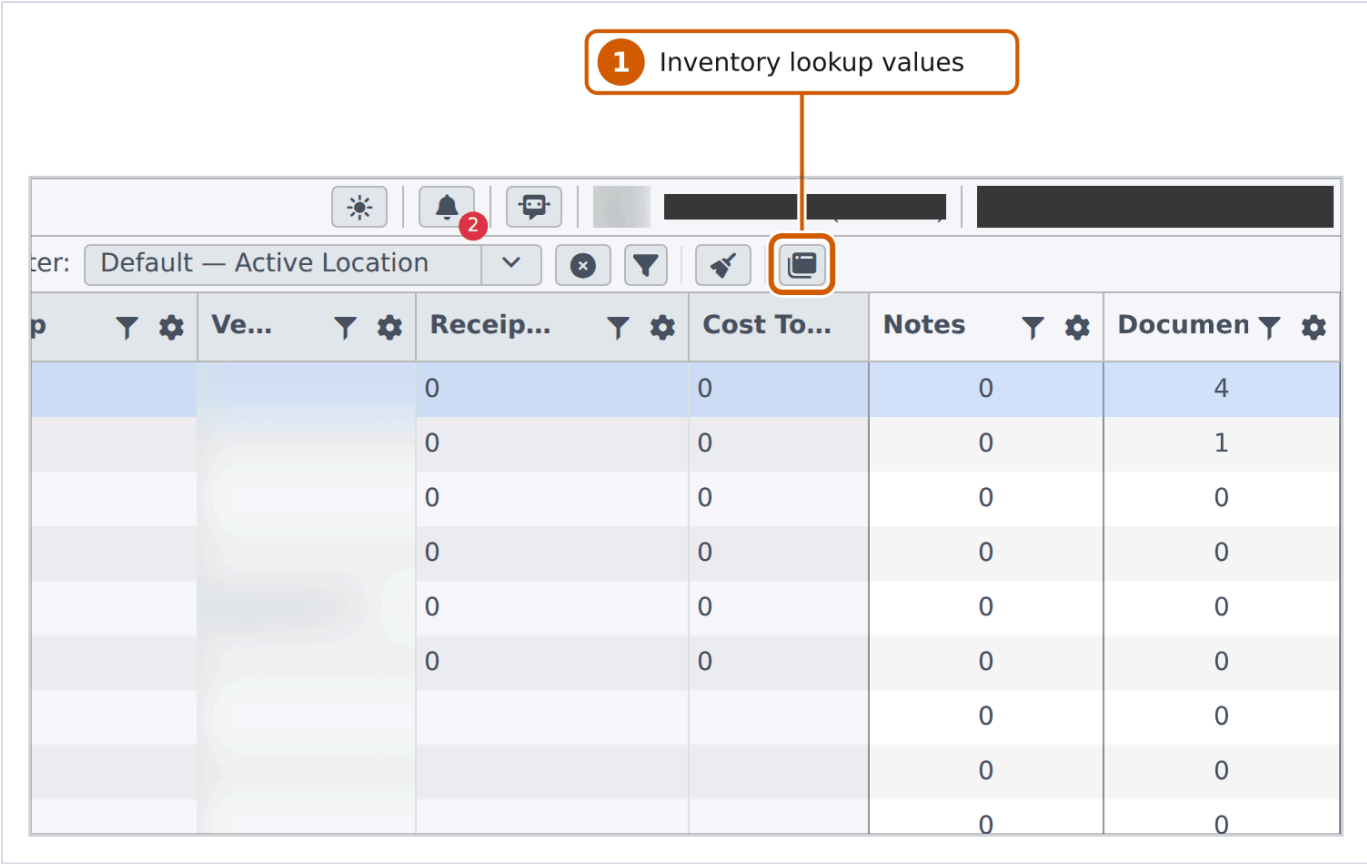
> **Note:** If no table is chosen, the message "Please select a valid lookup table." appears instead.

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