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

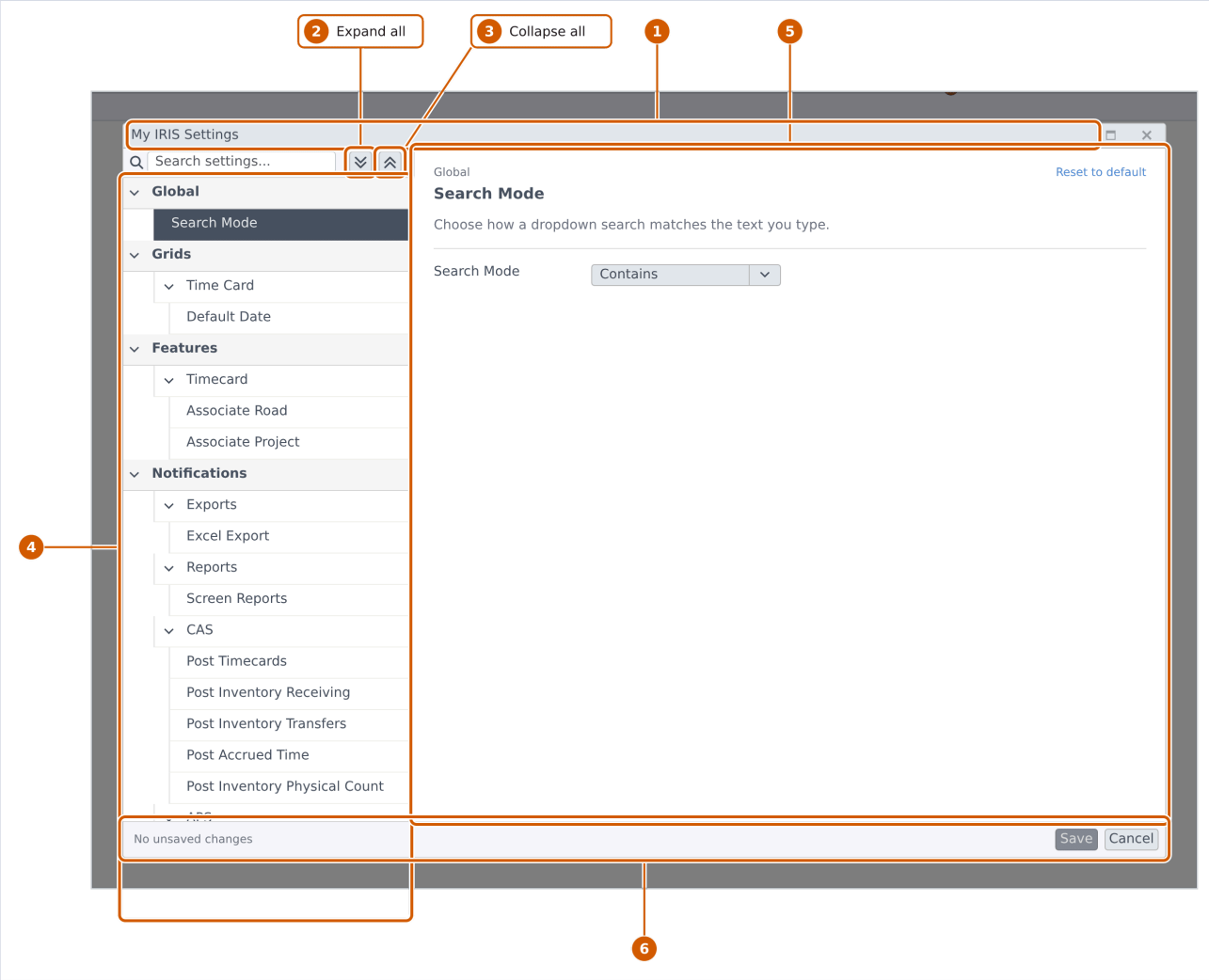
- Sign in to IRIS10. See Logging in. The county you choose when you sign in determines where your settings are saved.
- Make sure you have access to the My IRIS Settings screen in the Utilities portal. See Security Administration: access levels by user.
- For the Time Card settings, make sure you have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

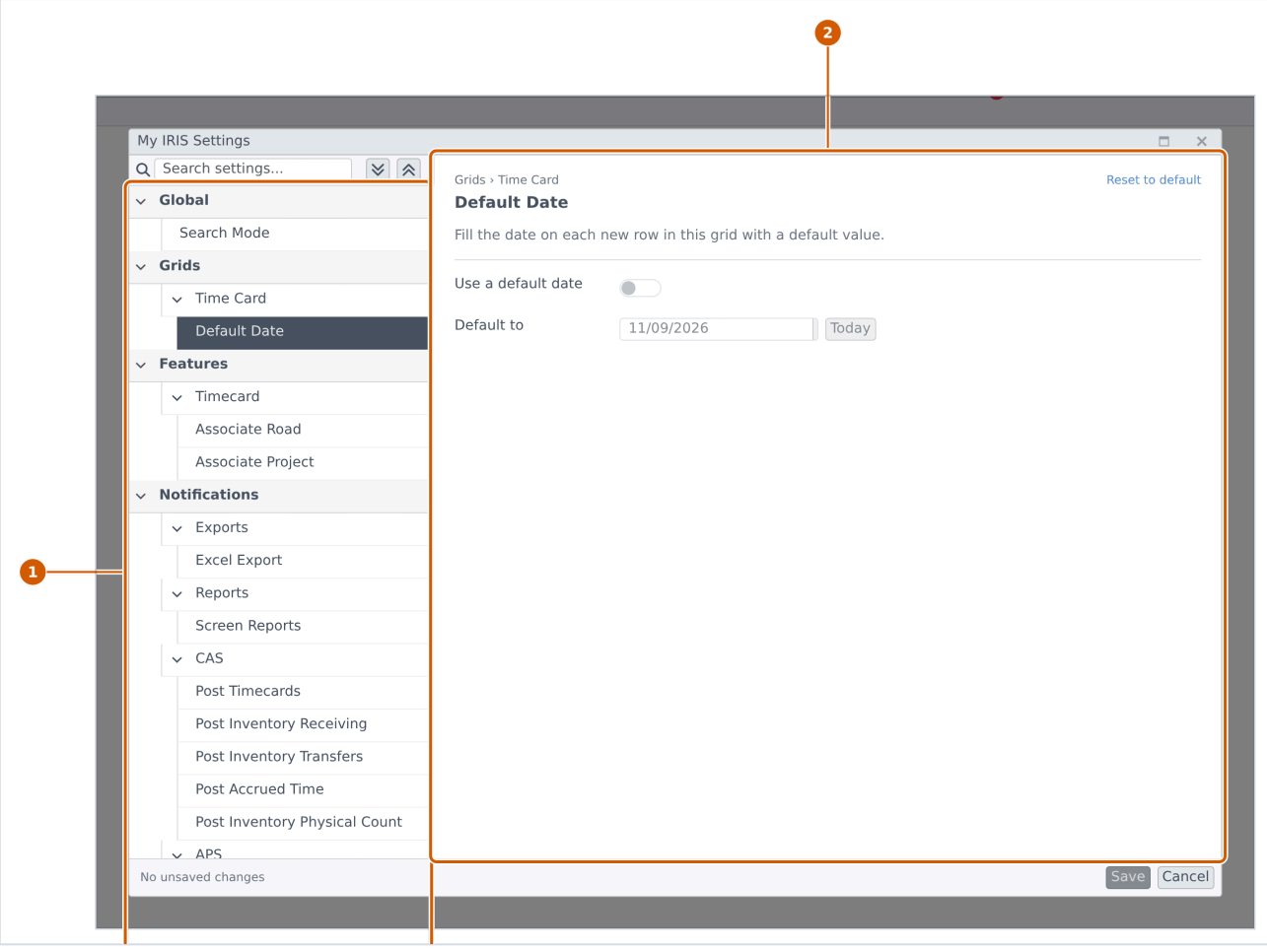
Change how dropdown searches match (Search Mode)

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

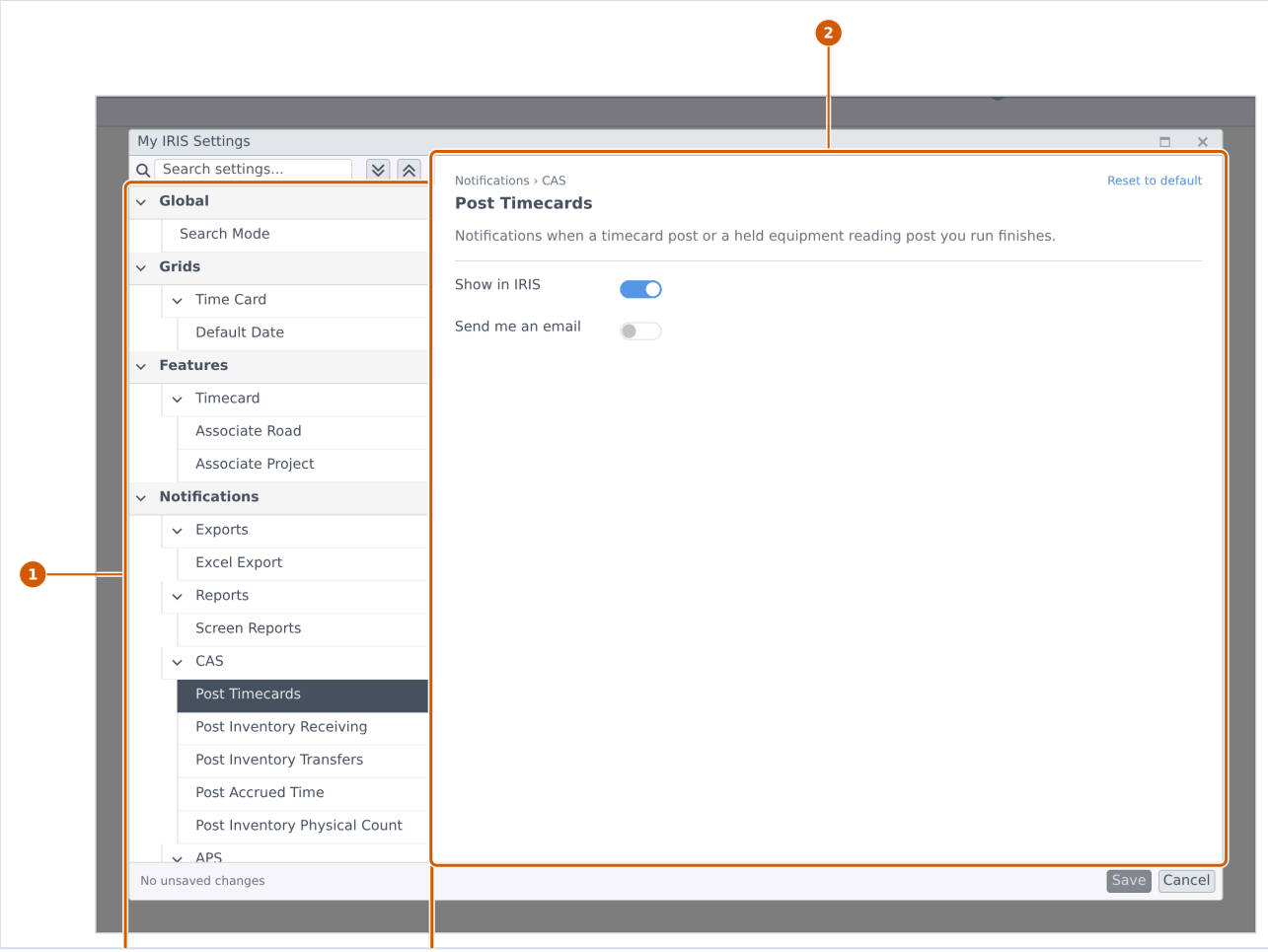
1. In the tree, under **Features** > **Timecard**, select **Associate Road** or **Associate Project**. The detail panel shows the setting. Both are off by default.

   > **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).



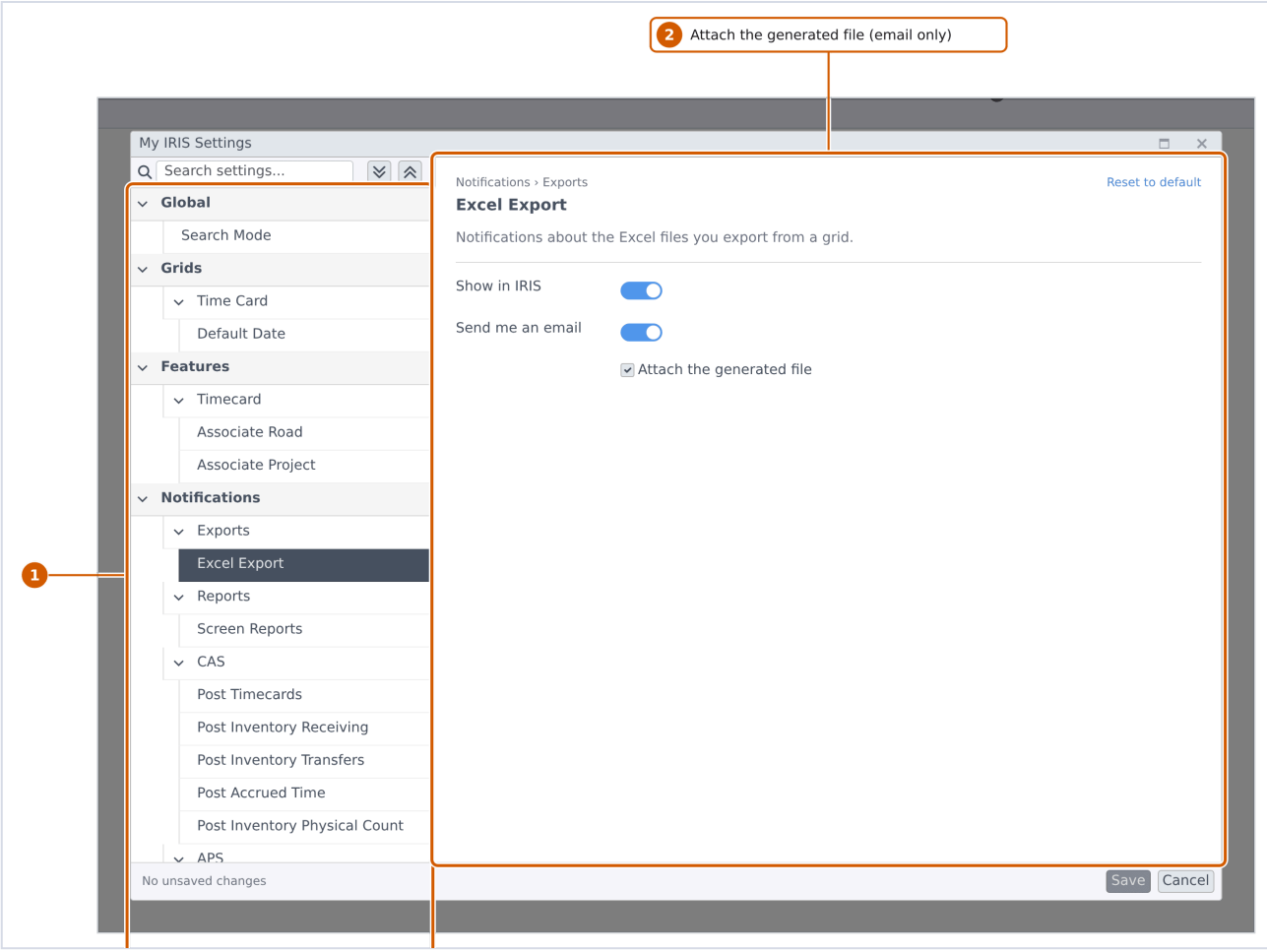
Notification setting for CAS > Post Timecards: choose whether to see it in IRIS and whether to receive an email.

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