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.

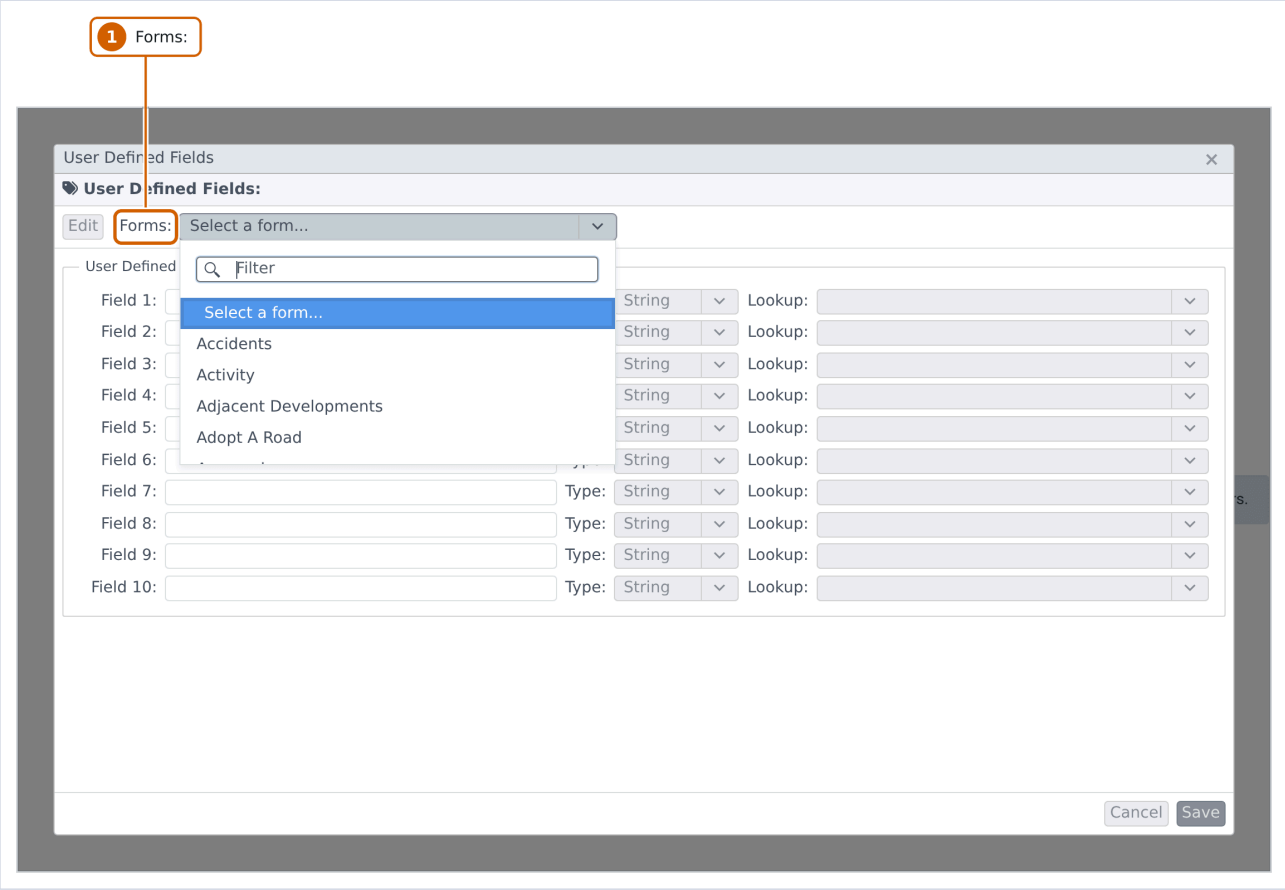
Procedure

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

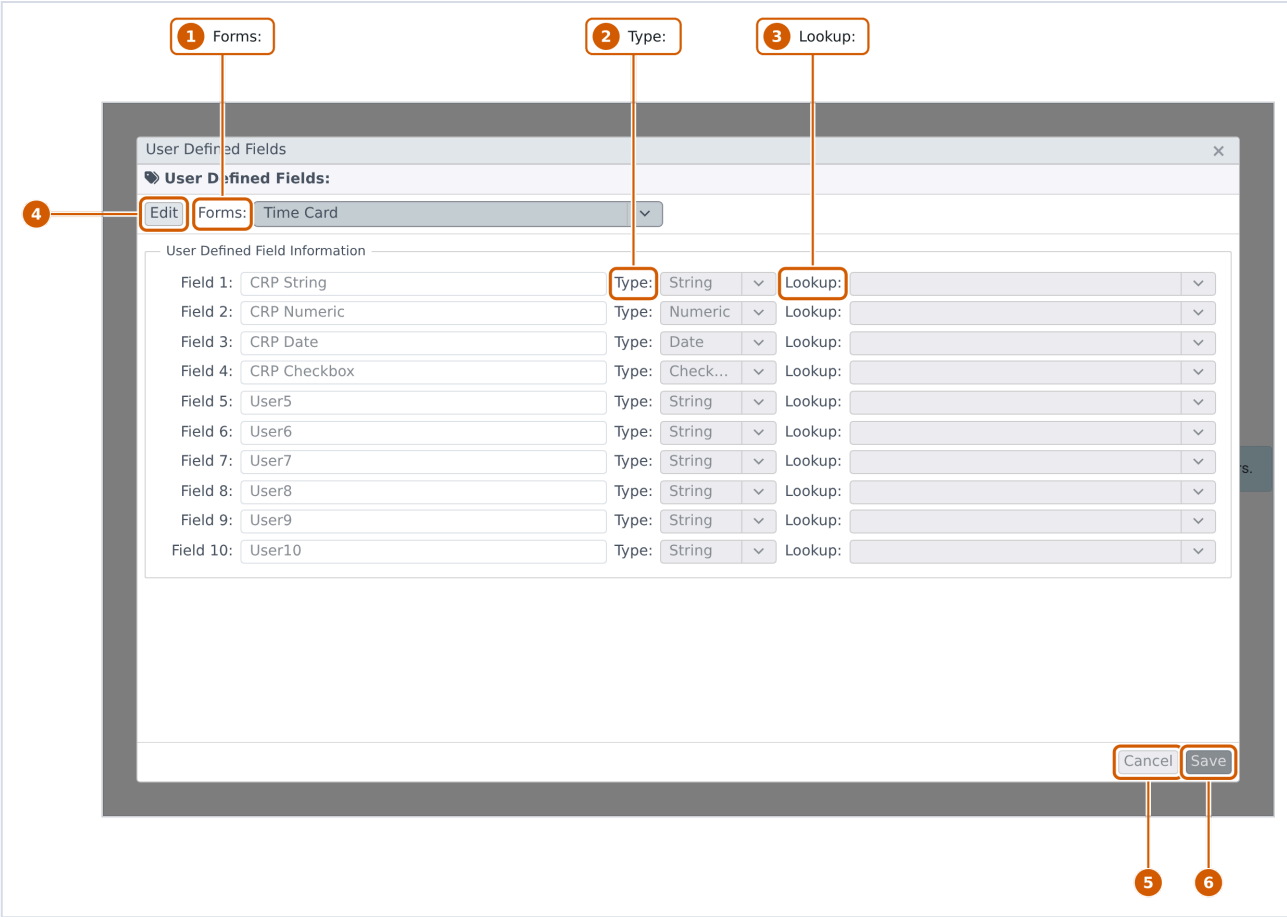
1. In the window, click the **Forms:** list. The list opens. Before you choose anything, it shows `Select a form...`.



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