Office Admin: Managing Value Lists

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Office / System Admin UserGuides

Administration UserGuides are divided into two groups: ***Office*** and ***System***. The difference is that all Users can modify ***Office Admin*** functions, whereas only someone with System Administrator privileges can modify ***System Admin*** functions.

Office Admin functions are:

5.1 Managing Value Lists
5.2 New TeamWork Templates
5.3 Managing Profiles

System Admin functions are:

5.4 Firm Details Setup
5.5 Office Settings
5.6 Users & Privileges
5.7 Custom DDNA & System DDNA
5.8 Creating Project Guides

Managing Value Lists

Value Lists are the drop-down menus that appear on various screens of System, Contacts and Projects within **iProjects**. In some cases, they can be edited in a project record by any user (such as Project Phase and Project Status). Most, however, require centralized editing, for uniform use across all projects. This editing is done by someone with System Administrator privileges. Generic Value Lists are shown under the Value List tab in Office Admin.

The Country and State drop-downs are obvious.

A number of value lists help users to classify Contacts, and find Contacts that fit a range of characteristics – see UserGuide ***3.1 Contacts: Details*** for a discussion of these.

Other value lists are used in defining the roles of Project Team members – see UserGuide ***4.6 Project Team*** for a discussion of these.

To edit any Value List, click on the empty field to display the Edit item at the bottom (scroll down if needed):

Doing that opens an edit window, as displayed right, permitting you to enter new values, re-arrange the order of values, and delete values you don't need.

When you're done, click the OK button, as shown in the screenshot below right.

It's that simple.