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Dynamic Lists are available from Highstage Version **SW10055-8**

Dynamic Lists - Configuration

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1. Introduction

A *Dynamic List* is a quick and easy way to create and manage lists and their associated entries to be used throughout Highstage. In this article, you will be introduced to the configuration and use of *Dynamic Lists* in Highstage.

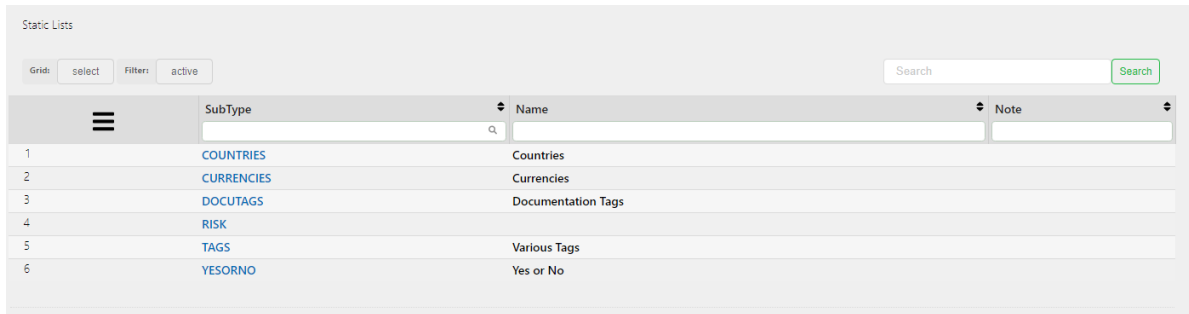
2. When to use *Dynamic Lists*

Dynamic Lists can be created and continuously managed by Highstage users directly from Highstage. For this reason, it is beneficial to utilize *Dynamic Lists* when entries need to be regularly maintained, configured or added to.

3. Guides

3.1. Accessing Dynamic Lists

All available lists can be accessed by navigating to `Dynamic Lists` > `Lists` in the side navigation menu:



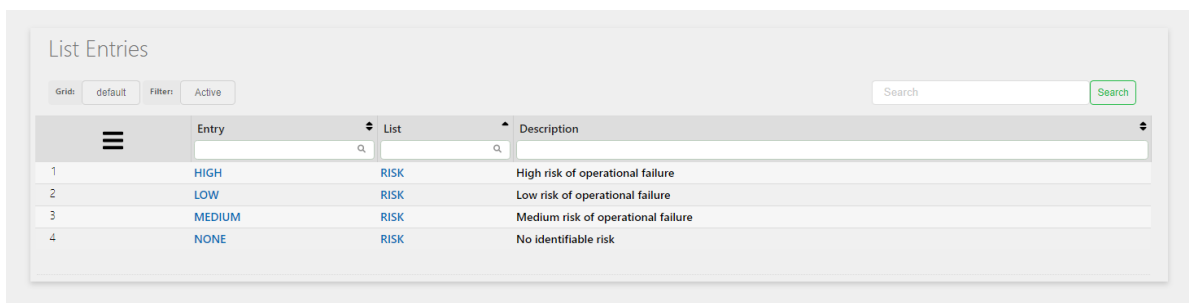
The screenshot shows the 'Static Lists' interface. At the top, there are tabs for 'Grid: select' and 'Filter: active', and a search bar with a 'Search' button. Below this is a table with columns for 'SubType', 'Name', and 'Note'. The table contains six rows of data:

	SubType	Name	Note
1	COUNTRIES	Countries	
2	CURRENCIES	Currencies	
3	DOCUTAGS	Documentation Tags	
4	RISK		
5	TAGS	Various Tags	
6	YESORNO	Yes or No	

From here, you get an overview of all available and active *Dynamic Lists*.

3.2. Accessing list entries

All existing entries for all lists can be accessed by navigating to `Dynamic Lists` > `Entries` in the side navigation menu:



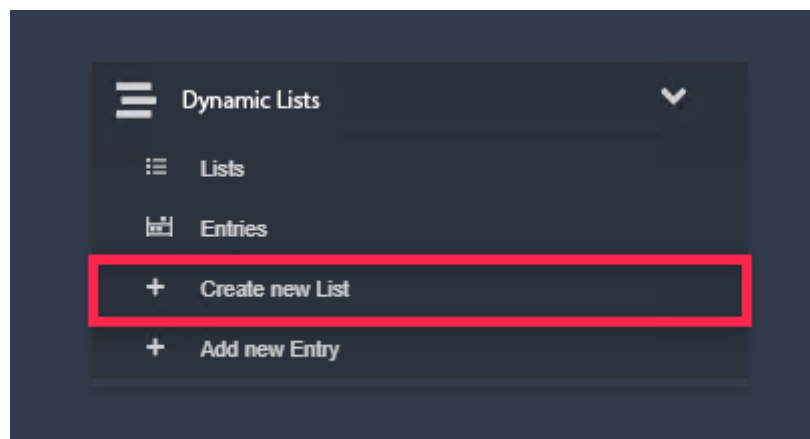
The screenshot shows the 'List Entries' interface. At the top, there are tabs for 'Grid: default' and 'Filter: Active', and a search bar with a 'Search' button. Below this is a table with columns for 'Entry', 'List', and 'Description'. The table contains four rows of data:

	Entry	List	Description
1	HIGH	RISK	High risk of operational failure
2	LOW	RISK	Low risk of operational failure
3	MEDIUM	RISK	Medium risk of operational failure
4	NONE	RISK	No identifiable risk

From here, you get an overview of all entries associated with all active *Dynamic Lists*.

3.3. Creating a new Dynamic List

1. Access `Dynamic Lists` and click *Create new List*:



2. In the *Subtype* field, specify a name for the new *Dynamic List* and click `CREATE` :

Create new Subtype

SubType

CREATE

NOTE: You **must** specify the name in capital letters. The following characters are permitted: ABCDEFGHIJKLMNOPQRSTUVWXYZ0123456789-.

Once the list is created, you are navigated to the list page:

The screenshot shows the configuration page for a subtype named 'RISK'. The page has a dark navigation bar at the top with icons for Home, Refresh, Mail, EventLog, Trace, Reset, ST, User, and View as. Below the navigation bar, the page title is 'RISK'. Underneath, there is a section for 'Subtype RISK' with a dropdown arrow. The configuration fields are as follows:

- Type:** RISK (Type prefix, short with no special characters)
- Name:** (Descriptive name)
- Note:** (General purpose note)
- Active:** (Activates the type. Enables creation of new objects.)
- TrustCreate:** [TSDADMIN] (Defines users and usergroups that is allowed to create new objects of this subtype)
- Class:** (Class to which this type belongs)
- TemplateDocument:** (Leave blank to use template folder defined by parameter TemplatesPath. For revision management of templates a document ID may be specified. Use ID without revision to specify latest approved. Use document root folder for process/template description and create one subfolder for each template.)
- TemplateLocation:** This subtype has no template folder. (Physical location of template folder and definition file)
- TemplateFolder:** (Folder name to use as template folder.)
- TemplateFile:** (Primary template file from template folder. File extension of all template folder files should be in lowercase due to Linux/Mac case sensitivity.)
- DefinitionFile:** (Name of subtype definition xml file. Leave blank to use default file)

At the bottom of the configuration section, there are two expandable sections: 'Options' and 'Visualization'.

3. Check the **Active** checkbox to make the list active to allow entries to be added to the list:

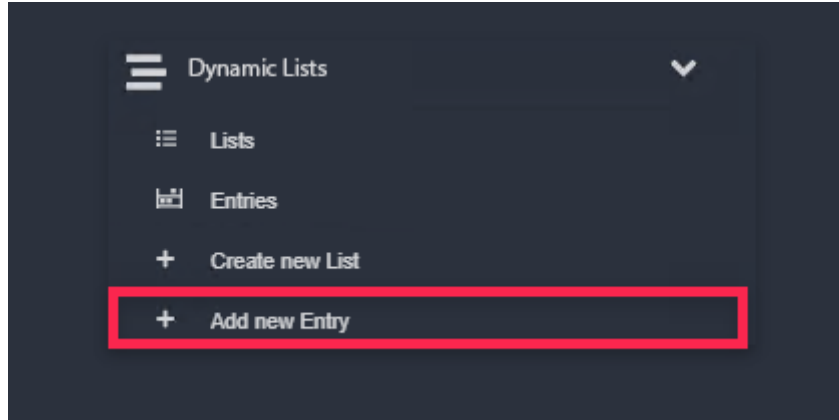
This screenshot is similar to the previous one, but the 'Active' checkbox is now checked, indicating that the subtype is active. The configuration fields are the same as in the previous screenshot.

NOTE: Activating the list requires a minimum user level of *SuperUser*.

Success! You have successfully created a new *Dynamic List* in Highstage

3.4. Add entry to an existing list

1. Navigate to `Dynamic Lists` and click *Add new Entry* in the side navigation menu:



2. Fill out the appropriate fields:

A light gray form titled 'Create new List Entry'. It contains four input fields: 'Add to existing list*' (with a search icon), 'Entry*' (with a red asterisk), 'Description:' (with a red asterisk), and 'Manager:' (with a search icon and the text 'ST'). Below the fields is a 'Create More' checkbox and a 'CREATE' button.

NOTE: You **must** specify the entry in capital letters. The following characters are permitted: ABCDEFGHIJKLMNOPQRSTUVWXYZ0123456789-.

Field	Description	Required
<code>Add to existing list</code>	Select an existing <i>Dynamic List</i> for the new entry to be added to.	✓
<code>Entry</code>	The name of the new entry in the <i>Dynamic List</i> (<i>In capital letters</i>)	✓
<code>Description</code>	An optional entry description	✗
<code>Manager</code>	Select a user as <code>Manager</code> who is responsible for managing and modifying the select entry. (<i>Default manager is the user who creates the entry</i>)	✓

3. Click `CREATE` to create the entry to be added to the specified *Dynamic List*.

Once created, you are navigated to the list entry:

NONE

▼ List Entry NONE raw

Filter... Filter

Name	Title	Value	Description
description:	Description	No identifiable risk	
listtype:	List	RISK	
manager:	Manager	ST	
name:	Entry	NONE	
obsolete:	Obsolete	<input type="checkbox"/>	Remove entry from list

> Referenced by 0 Page 1/1

▼ Reference 0 Page 1/1

Scope:Top Tree-View

Success! You have successfully created a new *Entry* in an existing list

3.5. Disable an existing active Dynamic List

A disabled *Dynamic List* cannot be used in Highstage. Similarly, new entries cannot be added to disabled lists.

1. Navigate to `Dynamic Lists` > `Lists` in the side navigation menu.
2. Click on the link to the appropriate list.
3. Uncheck the `Active` field.

Success! You have successfully deactivated an existing list

Note: To get an overview of all deactivated lists you can modify the *Filter* to show inactive *Dynamic lists*.

3.6. Obsolete entries from an existing list

You can remove entries from an existing list by making them obsolete.

1. Navigate to `Dynamic Lists` > `Entries` in the side navigation menu.
2. Click on the link to the appropriate entry.
3. check `obsolete`.

Success! You have successfully obsoleted a list entry and will no longer be available

Note: To get an overview of all obsoleted entries, change the filter to *Obsolete* to show all obsoleted entries. Obsoleted entries can always be activated by unchecking the `obsolete` field.

4. Configuration

4.1. Security

Configuring security requires administrator privileges.

Navigate to `SYSTEM` > `SECURITY` > `BASETYPE SECURITY` and locate the `ts_list` basetype.

1. Configure `TrustRead` with appropriate `Users` / `Groups` / `Special Roles` to define which users who are able to view/read existing *Dynamic Lists* and their entries.
2. Configure `TrustModify` with appropriate `Users` / `Groups` / `Special Roles` to define which users who are able to modify and configure existing *Dynamic Lists* and their entries.
3. Configure `TrustCreate` with appropriate `Users` / `Groups` / `Special Roles` to define which users who are able to create new *Dynamic Lists* and their entries.

4.2. Configure *Dynamic Lists* in the side navigation menu

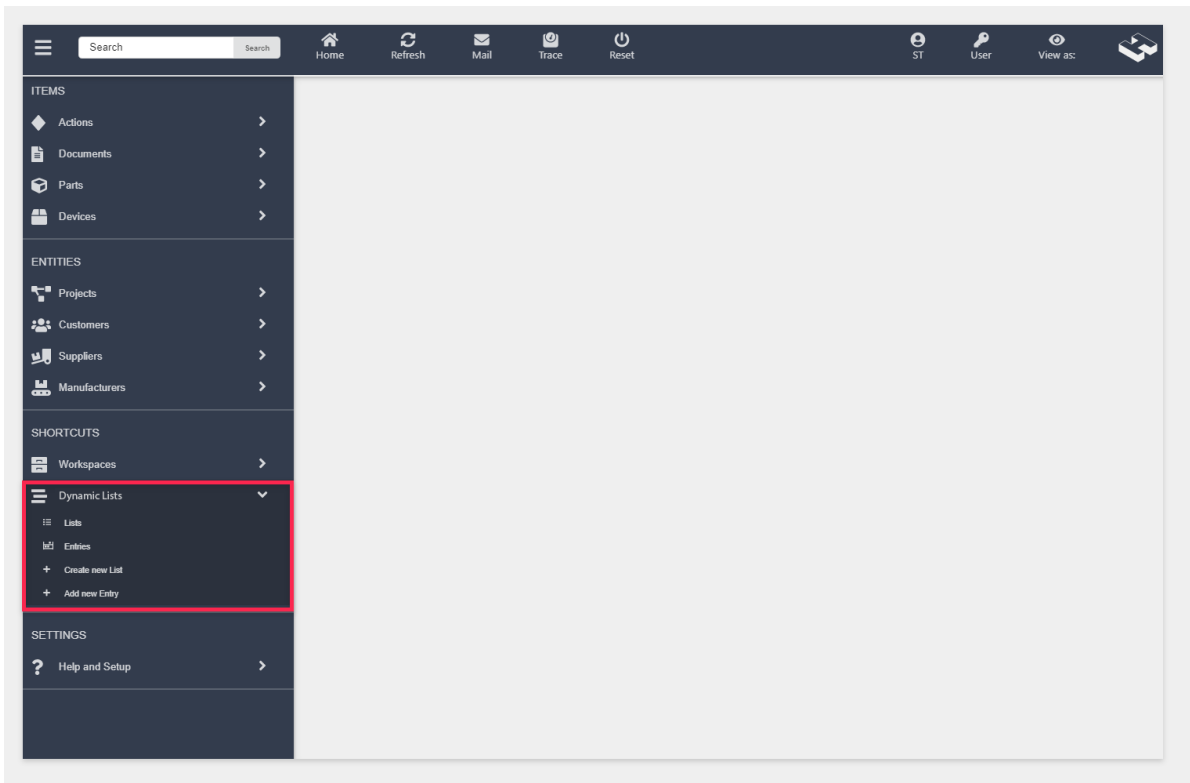
Dynamic Lists are available as a *Dynamic section* which can be added to the side navigation menu so that it is accessible to select Highstage users and not only Administrators.

The following sample illustrates how *Dynamic Lists* can be added to the side navigation menu:

```
<type name="ts_menu">
  <menu name="default">
    <section name="DynamicLists" size="medium" icon="fas fa-stream"
type="ts_list"/>
  </menu>
</type>
```

Note: The snippet must be added to the `custom.schema.xml` located in the tweak folder where Highstage is installed.

This will make the following section available in your Highstage installation:



Read more about the configuration of the side navigation menu on our official Highstage documentation page [here](#).

5. Samples

All snippets must be placed in the `custom.schema.xml` located in the tweak folder in your Highstage installation.

For any changes to take effect, please do the following:

1. To load new columns please navigate to `SYSTEM` > `SCHEMA` and click *Apply (Only required when new columns are defined)*.
2. For all changes to take effect you must *Reset* Highstage from the top header menu.


5.1. Use a Dynamic list as a field on all Documents

The following snippet provides an example of defining a new column that makes use of an existing RISK *Dynamic List* with a number of existing entries:

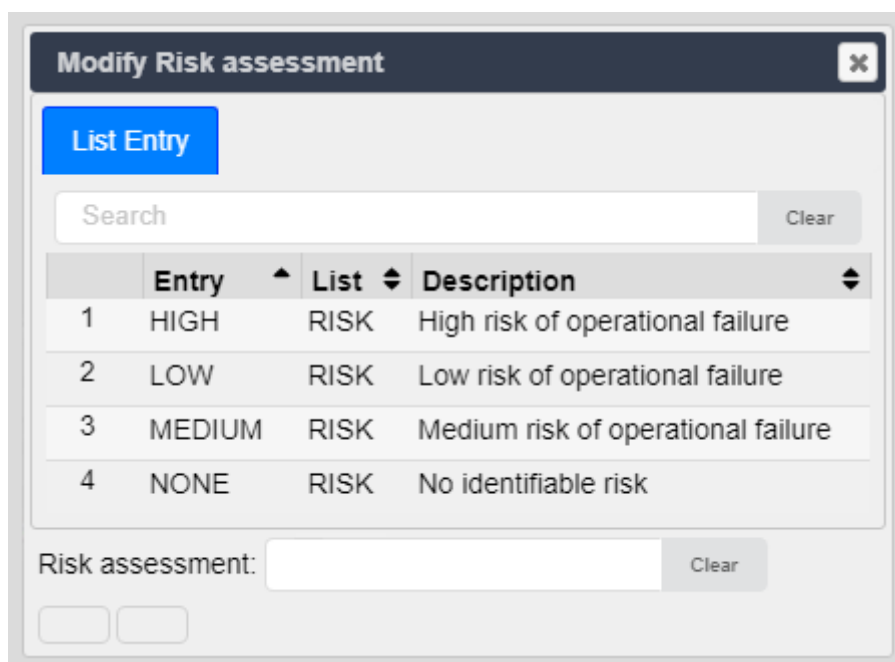
```
<type name="doc">
  <column name="risk" title="Risk assessment" description="Risk"
sqltype="varchar" sqlsize="200" mandatory="1" reload="1" sqlnull="0"
sqldefault="('')" objlist="0" type="RISK"/>

  <form name="default">
    <subform name="Risk" title="Risk Assessment">
      <field name="risk" />
    </subform>
  </form>
</type>
```

This makes a subform (*Risk Assessment*) available with a field for the specified column:



From this field, a user can select one existing entry from the list:



	Entry	List	Description
1	HIGH	RISK	High risk of operational failure
2	LOW	RISK	Low risk of operational failure
3	MEDIUM	RISK	Medium risk of operational failure
4	NONE	RISK	No identifiable risk

Tip: We use `objlist="0"` to specify that only one value must be selected for the column. In this manner, we ensure that only one risk evaluation can be selected.



Highstage