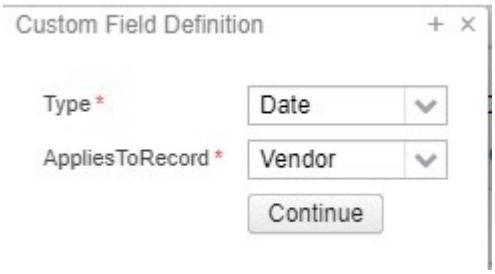
USXS-R Custom Field, GRID Reporting, & Advance Queries

Custom Fields: A 'Custom Field' is a field that the district defines that can be seen in different interfaces when creating, editing, or querying a record.

1. From the System menu select 'Custom Field Definition'
2. Click on

3. Select the 'Type' of custom field from the drop down. The 'Type' defines the format of the field.



Custom Field types (note: some have unique restrictions or capabilities):

- **Boolean**: displays a checkbox for the custom field allowing you to 'click' on it to select it. It will typically be represented as true or false, or as a checkbox which may be checked (true) or unchecked (false)
- **Code**: The user is presented with a dropdown list allowing them to select from the list of valid codes. The list of valid codes are entered during the code's custom field creation.
- **CreateDateTime**: read-only; automatically updated to the system date when creating new record.
- **CreatedUser:** read-only; automatically updated with the username of the user who created the new record
- **Date**: must be in proper date format (mm/dd/yyyy)
- **DateTime**: read-only; automatically updated to the system date and time when creating the new record
- **Email**: must be in a valid email address format
- **LastModifiedDateTime**: read-only; automatically updated to the system date and time when the record was last modified
- **LastModified User**: read-only; automatically updated with the username of the user who last modified the record
- **Money**: automatically formats in number format. Will not accept dollar signs or commas.
- **Number**: enter a mininum and maximum number range. Figure entered in this field must be within the range defined when the custom field was created.
- **Text**: custom text field
- **User**: allows selecting a valid username from a dropdown list
- **WebAddress**: must be in a valid web address format http:// or https:// is required at the beginning

4. Select the record that this custom field will apply to from the 'Applies To Record' drop down

5. Click on Continue

6. Enter in following information:

- Display Name: field name you want displayed on the interface
- Order: order number you want it to appear within the group. For example, if you want the custom field to be displayed at the beginning of the 1099 section in vendors, enter '1'.
- Property Name: name for report properties
- Group: section of the interface you want the custom field displayed

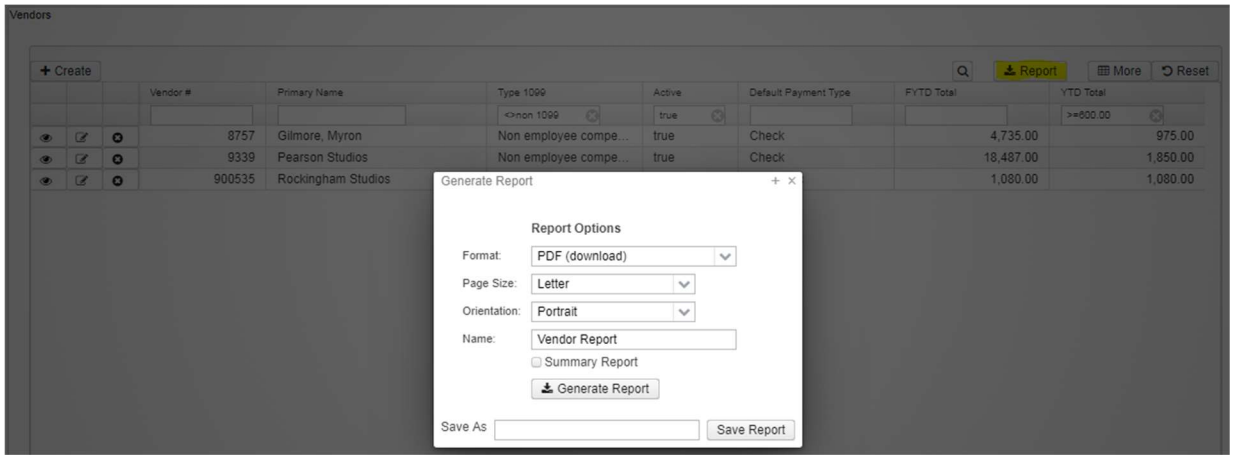
The Display Name is what appears as the field label when viewing, creating, or editing a record.

7. Click on Save to save the custom field to the system, click on Cancel to not save the custom field and return to the Custom Field Grid.

After, you can view the newly created custom field on the user interface. For example, if I created a date field to indicate the W9 is on file, I would see the following in the Vendor interface as the first field on the 1099 section.

Building Reports from the GRID

- Grids are best to use when you want to pull in data and need to update information based upon the data pulled or to do a quick search. In addition, they are a great starting point on building a customized report.
- You can generate a report from any of the grids. The report automatically includes all columns on your grid and pulls data from what you have entered on the filter row. For example, the screenshot below, you can generate a quick report of active 1099 vendors containing a YTD amount of $600 or higher.
    - After selecting your report options, click on Generate Report to generate the report.
    - If you want to save the report for future use, enter a report name in the Save As box and click on Save Report. Your saved report will be automatically added to the Report Manager grid.

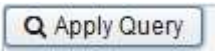


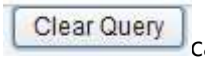
Advance Queries

Advance Query is a more elaborate search where a user selects the property to search on, the operation to search by, and enters what they are searching for. This may be useful for complex queries or to search by information without having to first add columns to your grid.

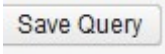
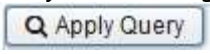
https://youtu.be/sfMK6W0w2ms?list=PL_dc8YSNxpKqslHMcb2ZxtyflF4FmIxMl

- To add properties the user can either double click the desired property from the "Properties" box on the left, or drag and drop it to the center section of the screen. In this example, the property 'defaultPaymentType' was selected and thus appears in the "Display Name" column. The user would then select an Operation from the dropdown box and enter in a Filter Value. For example, selecting an operation of '.eq' and entering a Filter Value of 'electronic' would result in searching for all vendors with a default payment type of electronic. The user can add as many search lines as desired by double-clicking or

dragging and dropping more properties from the "Properties" box into the center section. The last step is to click on  to apply the search criteria to the grid.

The can be used to remove a search line, and  can be used to clear the entire advanced search query.

As properties, operations, and text are entered there is an expert box on the right side of the screen that fills in automatically. The expert search box may also be used by itself if the user prefers to write their own query using the properties and operations, or to copy and paste a query you have received from someone. The expert search is useful for troubleshooting and for easy sharing of queries with other users.

The advanced searches can be saved and recalled later, and will also be available as filters in the detail reports. If the user chooses to save the search they would enter in a Query name and click on  . To recall a previously saved query select the desired one from the drop down box on the right hand side of the advanced query and all previously saved criteria is loaded in. At this point the user may make changes if desired and once satisfied with the query they would then click on the  .