ADMIN GUIDE: CUSTOM FIELDS V1.1

Custom Fields Summary

Custom fields are a way to add any additional information required by your company that is not already listed in one of the DCI wizards. Custom Fields can be created for the following items:

- Client Profile
- Employee Profile
- Funding Source
- Authorization
- Residential Program
- Day Program
- Case Worker
- Group Service
- Parenting PRogram
- Guardian
- Vendor
- Cost Center
- Service Code
- Regions
- Client FUnding Account
- Employee Service Account
- Client Service Account
- Vendor Service Account
- Batches

Custom Field Definitions Setting

Permissions/Roles Needed: Custom Field Admin Permission

This is a feature located in the Settings module that allows a user to add Custom Field Definitions for use under the Custom Note Type. The Custom Field Definitions can be selected on any note in the system in which the user selects a Type of Custom.

To add a new Custom Field:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select 'Settings' from the header
3. Choose 'Custom Field Definitions' from the side bar
4. Click Actions, then 'Add New Custom Field'
5. Complete wizard
    a. Item Type: Specify which DCI item this custom field should appear on (**required)**
    b. Name: Name the Custom Field - no spaces **(required)**
    c. Label: The label that appears to the user **(required)**
    d. Description: Description of the field
    e. Help Text: Will appear to the user when hovering over the tooltip icon.
    f. Input Type: Specify how the information should be entered **(required)**
        i. Numeric: Value will be entered as a number
        ii. String: Value will be entered in a text box
        iii. Date: Value will be entered as a date
        iv. List: Value will be selected from dropdown menu
            1. If List is selected, List Values will need to be entered in List Values field on wizard
    g. RegEx: Enter particular formatting for field, if desired.
        i. Example: If Numeric value should be in dollars, add in Regular Expression to format as such.

        ii. NOTE: This field is only editable if Numeric or String is selected as Input Type.
    h. Default Value: Value that should appear in the custom field when editing custom fields. NOTE: The default value will *not* automatically be added to all items in the system. It simply designates which value auto-populates (and is editable) on the wizard when editing custom fields.
    i. EDI: Specify whether the field is needed for EDI
    j. Status: Select Active/Inactive
6. Click Save, then yes on the confirmation window

To search for a Custom Field:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select ‘Settings’ from the header
3. Choose ‘Custom Field Definitions’ from the side bar
4. Specify search criteria then click ‘Search’
5. The view below will populate with relevant data associated with your search criteria
6. To reset the search and show all Custom Field Definitions, click ‘Reset’

To export Custom Field Definitions:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select ‘Settings’ from the header
3. Choose ‘Custom Field Definitions’ from the side bar
4. There are two options to export:
    a. Export all Custom Field Definitions by clicking the ‘Export’ button located beneath the search filters
    b. Use the search criteria referenced in the instructions above to show a group of filtered Custom Field Definitions, then click the ‘Export’ button located beneath the search filters
5. The file will automatically download and save to the ‘Download’ folder on your PC as a CSV file
    a. This file is compatible with Microsoft Excel.

To view a Custom Field:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select ‘Settings’ from the header
3. Choose ‘Custom Field Definitions’ from the side bar
4. Click anywhere in the row to select a particular Custom Field
5. This will open the Custom Field Details Page where you can view/filter events and edit the Custom Field information.

To edit a Custom Field:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Select ‘Settings’ from the header
3. Choose ‘Custom Field Definitions’ from the side bar

4. Click anywhere in the row to select a particular Custom Field; this will open the Custom Field Details screen.
5. Select ‘Actions’ then ‘Edit Custom Field’
6. Complete desired edits
7. Click ‘Save’ then select ‘Yes’ on the confirmation window
    a. If you wish to terminate the changes, click ‘No’ on the confirmation window then ‘Cancel’

Custom Field Values

Permissions/Roles Needed: Access to details page in which custom fields should be added

Custom field values can be added for individual items via the item details page using either the Add/Edit wizard or using the Edit Custom Field Values wizard.

To Edit Custom Field Values separate from the standard item wizard:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Navigate to the desired details page
3. Click Actions, then ‘Edit Custom Field Values’
4. Complete wizard
    a. All custom fields that exist in the system will appear in the wizard. All fields are optional.
    b. If the Custom Field has a default value, it will display in the form field.
    c. Hover over the tooltip icon to read help text.
    d. Hover over the question mark icon to see whether or not the field is required for EDI.
5. Click Save, then yes on the confirmation window

To view Custom Field Values:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Navigate to the desired details page
3. Choose the ‘Custom Fields’ tab
4. This will display the Custom Fields table where you can view/filter the values for the desired object.

NOTE: Users who have access to the Report Module can view Custom Field Values across multiple objects on the Custom Field Values Report. The results can be compared to the appropriate item type report using Excel Vlookup. For example, to see all custom field values for Employee Profiles, the user would run a Custom Field Values Report and an Employee Report and compare the ItemID on the Custom Field values Report to the ProfileID column on the Employees Report.