Custom Fields in Protege GX

Application Note

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Custom User Fields

Custom fields provide a consistent and organized way to store additional user information which would not otherwise exist in Protege GX by default. Protege GX allows you to create additional tabs and fields for any particulars you can imagine, displayed within user records to be filled out as needed.

Typical Usage

Custom fields provide a simple solution for storing unique user data within Protege GX. Create custom fields for vehicle details, company department, safety qualifications, emergency contact, sporting affiliations, and any other user related data.

This allows you to store, access and edit this information within a single custom field tab, or across multiple tabs if this better suits your needs. Custom fields can also be selected in reporting to easily identify staff, visitors, tenants and other users by specified custom criteria.

A sample of the many potential uses of custom fields include:

- Run and export reports for any custom data
- Import custom data from HR systems using the ICT Data Sync Service
- Include custom information on printed user ID cards (see AN-149 Creating a Photo ID Template)
- Record information from visitors using the VMS (see AN-287 Protege GX Visitor Management System)

Overview

The steps required to implement the custom fields feature in Protege GX are:

- Creating a custom field tab to display custom fields.
- Creating the required custom fields.
- Populating the custom fields for users as needed.

Configuring Custom Fields

The following instructions outline how to create and configure custom fields in Protege GX.

Creating a Custom Field Tab

Custom field tabs are added to the **Users** page in Protege GX and behave like any other programming tab in the software.

1. Navigate to **Users | Custom Field Tabs** and click **Add**.

2. Enter a **Name** to identify the new **Custom Field Tab** and the type of information that will be stored under it.

3. Click **Save**.

Creating Custom Fields

1. Navigate to **Users | Custom Fields** and click **Add** to create a new custom field.

2. Enter a **Name** to describe the information that will be stored in the custom field.

3. If required, apply a **Record Group**. This can be used in conjunction with operator roles (**Global | Roles | Security Levels**) to restrict which custom fields specific operators are able to view and access.

4. Select the Custom Field **Tab** under which this custom field will appear.

5. Select the **Field Type** to define the data format of the custom field.

   For information on Field Type configuration refer to the Field Types section below.

6. Some field types include the option to define a **Default Value**. The user field is automatically populated with the value entered here, but this can be overwritten in individual user records as needed.

7. When the **Field Type** is set to Image, the **Pixels** setting defines the width and height of stored images.

8. Click **Save**.

If a custom field is changed to an Option field type after its initial creation, the option will be automatically enabled for all users (including apartment users). If you create a custom field and forget to set the field type to Option before saving, you should delete the custom field and re-add it correctly rather than changing the type.

Custom fields appear under the custom field tab in the order in which they are added, so if a specific layout is required you must create the custom fields in the order they should appear on the page (from top to bottom).

Adding Drop Down Items

Creating a custom field with a drop drown selection requires additional programming.

1. Create a custom field with the **Field Type** set to **Drop Down Box**.

2. With the custom field selected, select the **Drop Down Items** tab.

3. Click **Add** to add a new **List Item** to the drop down list.

4. Enter the appropriate **Display Text**. This is the list item description.

5. Set the **Value** to determine the order placement of the list item in the drop down list.

   Items are listed in ascending numerical order. Any gaps in the numerical sequence are ignored.

6. Continue to add as many list items as required, then click **Save**.

7. A **Default Value** can be assigned to a drop down list, by entering the **list position number** of the item to set as the default selection. This is relative to the number and order of items in the list, not the list item values.

Once a list item is created its **Value** cannot be edited, so plan any list order preferences before starting. If the order is incorrect, the only option is to delete list items and recreate them with the required values.

Field Types

The **Field Type** of each custom field determines its behavior and available options. The table below describes each available field type and its properties.

Field Type	Description
Text*	Allows free text entry of up to 128 alphanumeric characters and common symbols. For example, the Text field can be used for phone number entry.
Numerical*	An incrementing numerical field that allows entry of any number up to **2147483647**. This field truncates leading zeros and does not allow entry of non-numeric characters, so is unsuitable for phone numbers. Instead, a text field is perfect for this purpose.
Time	A time may be entered by manual entry or clicking the clock icon. The format is HH:MM am/pm. New users will automatically be assigned the current time when added.
Date	A date may be entered by manual entry or clicking the calendar icon. The format is DD/MM/YYYY. New users will automatically be assigned the current date when added.
Time and Date	A combined time and date field, with the properties listed above.
Option*	Provides a checkbox option. If setting a **Default Value**, it must be entered as either True or False.
Link*	Allows entry of a clickable web link. Links must be entered in the format www.google.com.
Drop Down*	Create an ordered drop down selection list (see previous page). If a **Default Value** is set, it refers to the position number in the list order, regardless of the **Value** assigned in the list item configuration.
Image	Stores an image for a user by selecting a file path and cropping as required, within the constraints of the **Pixels** setting. Accepts .bmp, .jpg, .png image formats.

Custom fields listed with ***** can be configured with a **Default Value**.

Viewing and Using Custom Fields

Custom fields can be viewed by navigating to **Users | Users** and clicking on the **Custom Field Tab** created above.

Fields will appear under the tab they have been assigned to and can be updated with user information in the same way as other Protege GX user fields, according to the assigned field type and programming conditions.

Default Values and Users

- When a new custom field is created, any default values will be assigned to existing users as appropriate.
- When a new user is added, they will be assigned any existing default values as appropriate.
- Default values are only assigned to existing users when the custom field is first created. If no default value is entered before the field is first saved, a default value added later will not be assigned to existing users. However, it will be assigned to new users added after the change.
- If the default value for an existing custom field is changed, this will not alter any custom field values already assigned to users, no matter whether the value is a default value or has been manually set.

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