

Fast-Class File

Client Data System

Volume 142: Mining Data in Custom Fields

To Customize a Field:

- Left-click in the field you want to customize to make the field active.
- Right click to display the **Field** menu.
- Select **Field Attributes** from the **Field** menu.
- In the **Field Attributes** window, change the values in the **Field Prompt** field and the **Unique Field ID** field to your custom value. The prompt and ID entries should be the same. The value in the **DB Column Name** field will remain the same.
- When finished, click **OK** and the field prompt will be reset to your custom value.



Figure 1: Field Attributes Window

To Customize Drop-down Choices:

- Left-click in the field you would like to add drop-down choices to.
- Then right-click for a **Field** menu.
- Select **Choice**.
- To create drop-down choices in the **Choice Options** window, click on the **Add** button to launch **Add Mode**.
- Type the choice value in the **Add Mode** field.
- After typing in the choice value, click **Save**. Repeat the same process for each desired choice.
- Drop-down choice values can be changed or deleted in the **Choice Options** window by selecting the choice, then clicking either the **Mod** (modify) or **Del** (delete) button.
- When you have finished defining your drop-down choices, click the **Close** button.
- To access the choice values defined in the Choice Options window, left-click in the modified field.
- Then left-click on the pull-down arrow on the right-hand side of the field.
- Select from the choices in the drop-down list.

Defining choices in the drop-down list is an excellent way of establishing a uniform convention for entering data.

To Create a Dynamic Report that Mines Data from the Custom Fields Tab:

- From the main screen in CDS, select **Reports**.
- In the Reports menu, select **Dynamic Reports**.
- In the **Find Report Selection** window, leave the search fields blank, and click **OK**.
- Click the **Add** button.
- Select the appropriate **Primary Table** and click **Next**.
- Select the appropriate columns to be included in the report.
- To select columns from other tables, such as the **Custom Fields** table, click on the **Columns Available Drop-down**, and select the appropriate columns from the **Columns Available** section.
- Adjust your column widths.
- Select a column for the **Sort By** section.
- When finished making your selections, click **Next**.
- In Step 2, select the appropriate **Filters** and click **Next**.
- In Step 3, select the appropriate **Output Option** and click **Next**.
- In Step 4, select the appropriate **Output Settings** and click **Next**.
- Enter a **Description** and **Keyword** (if necessary) and click **Finish**.