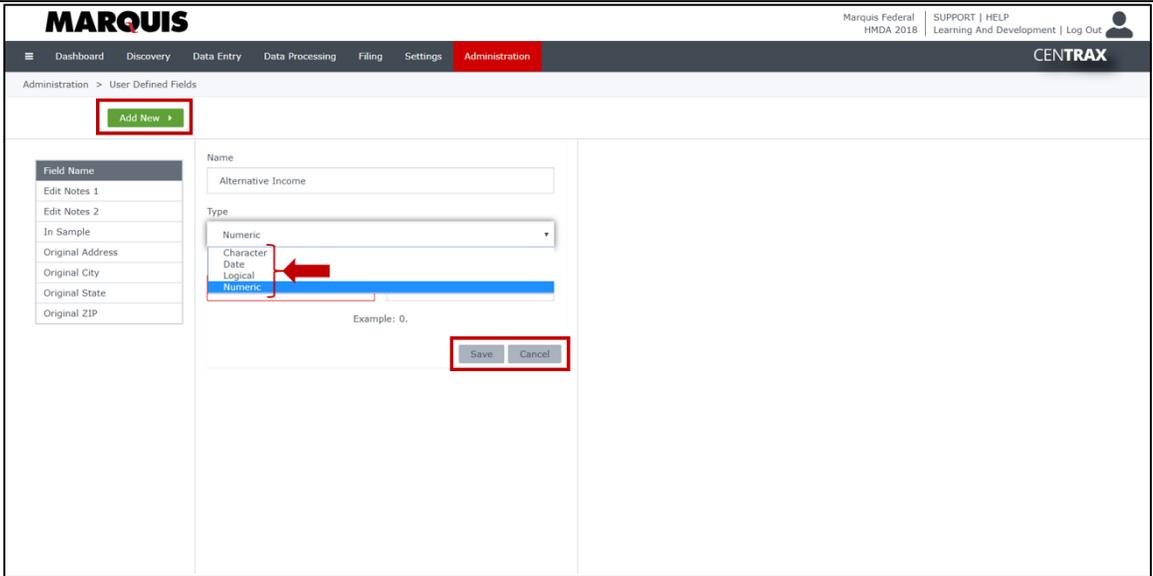


MARQUIS

CNX301	User Defined Fields
	User Defined Fields is available for creating fields that are not currently in the list of default fields to bring in but are desired to have in the system for extra analysis or informative purposes.
Order of Steps	Tasks
Step 1	Log into CentTrax NEXT
	The active Institution and File will display in the upper right-hand section to the left of the name of the user logged in.
Step 2	Click Settings located in the top menu
Step 3	Click on the User Defined Fields sub-category
Step 4	To Add a User Defined Field , click the green Add New button located in the upper left-hand corner of the screen
4.1	Type in a Name for the field
4.2	Click the drop-down arrow next to Type
4.3	Select a field type :
	<ul style="list-style-type: none"> • Character • Date (a character size box will not be available if this is selected) • Logical (a character size box will not be available if this is selected) • Numeric
4.4	If Character or Numeric types are selected, update the Size box with the total size the field needs to be to hold the information populating it
Note: If the type is set to Numeric and decimal places are used, the Size must include the whole number AND the number of decimal places. If the size is not big enough to include the decimal places, the box will appear red until the size is increased.	
4.5	Click Save
	
Step 5	To Edit a User Defined Field , click on the desired field from the list
5.1	Make changes to the appropriate fields

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Note: BEFORE making changes to the **Type** or **Size**, keep in mind that it might result in loss of data or content.

5.2 Click **Save**

Step 6 To **Copy** a **User Defined Field**, click on the desired field

6.1 Click **Copy**

6.2 Make any desired changes to the **Name**, **Type**, or **Size**

6.3 Click **Save**

Step 7 To **Delete** a **User Defined Field**, click on the desired field

7.1 Click the **Delete**

Note: Deleting a User Defined Field will permanently remove the field and any data within it.

7.2 Select **Yes, delete field and records**

The **User Defined Field** will no longer display in the list of fields

The screenshot shows the MARQUIS web application interface. At the top, there is a navigation bar with 'MARQUIS' on the left and 'Marquis Federal HMMA 2018 SUPPORT | HELP Learning And Development | Log Out' on the right. Below the navigation bar, the breadcrumb trail reads 'Administration > User Defined Fields'. A green 'Add New' button is visible. A modal dialog box is open in the center, displaying the text: 'This will permanently delete this user-defined field and the corresponding values. This action cannot be undone. Do you want to delete the records?'. The dialog has two buttons: 'Yes, delete field and records' (highlighted with a red box) and 'No'. In the background, the 'User Defined Fields' form is visible, with a list of fields on the left (highlighted with a red box) including 'Alternative Income', 'Edit Notes 1', 'Edit Notes 2', 'In Sample', 'Original Address', 'Original City', 'Original State', and 'Original ZIP'. The form for 'Alternative Income' shows 'Name: Alternative Income', 'Type: Numeric', 'Size: 15', and 'Decimals: 2'. An example value '1234567890123.45' is shown. At the bottom of the form, there are buttons for 'Delete', 'Copy', 'Save', and 'Cancel', with the 'Delete' button highlighted by a red box.