User Attributes Field (W5)

This version is superseded. Click here to view the latest guide.

PURPOSE

This document contains the procedure for creating user attributes fields.

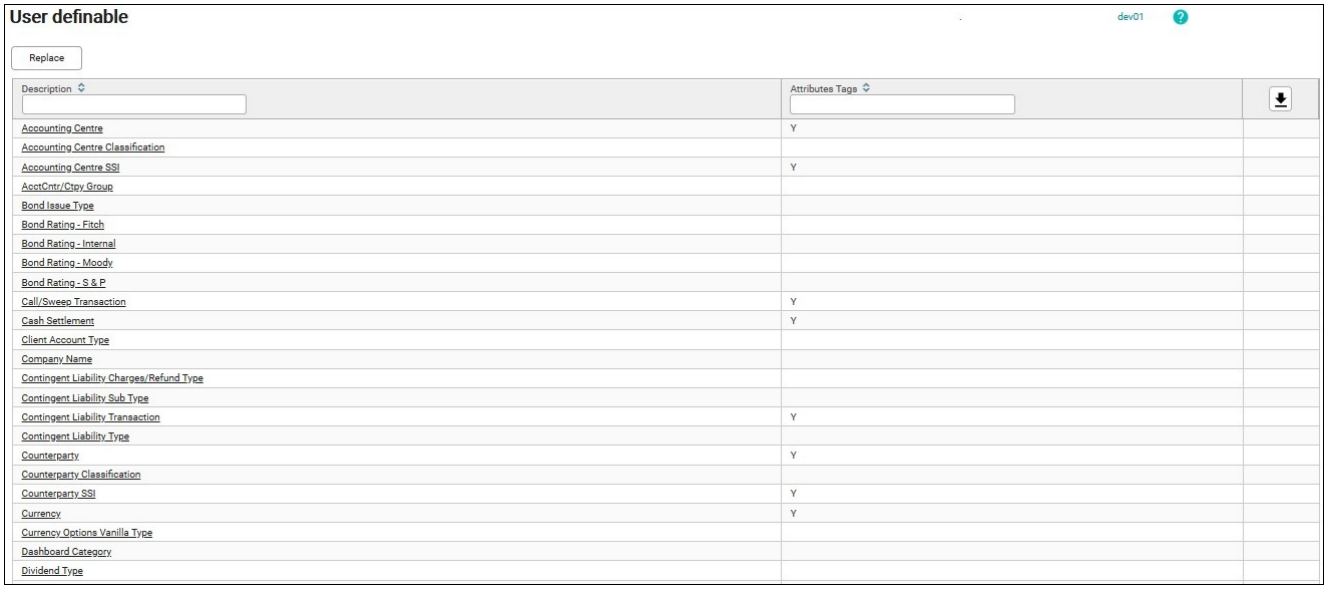
WHY IS THIS IMPORTANT?

User attributes field allows user to create new user field to tag in the transactions or static data. These fields are usually not standard fields but additional information that are required internally for information purpose.

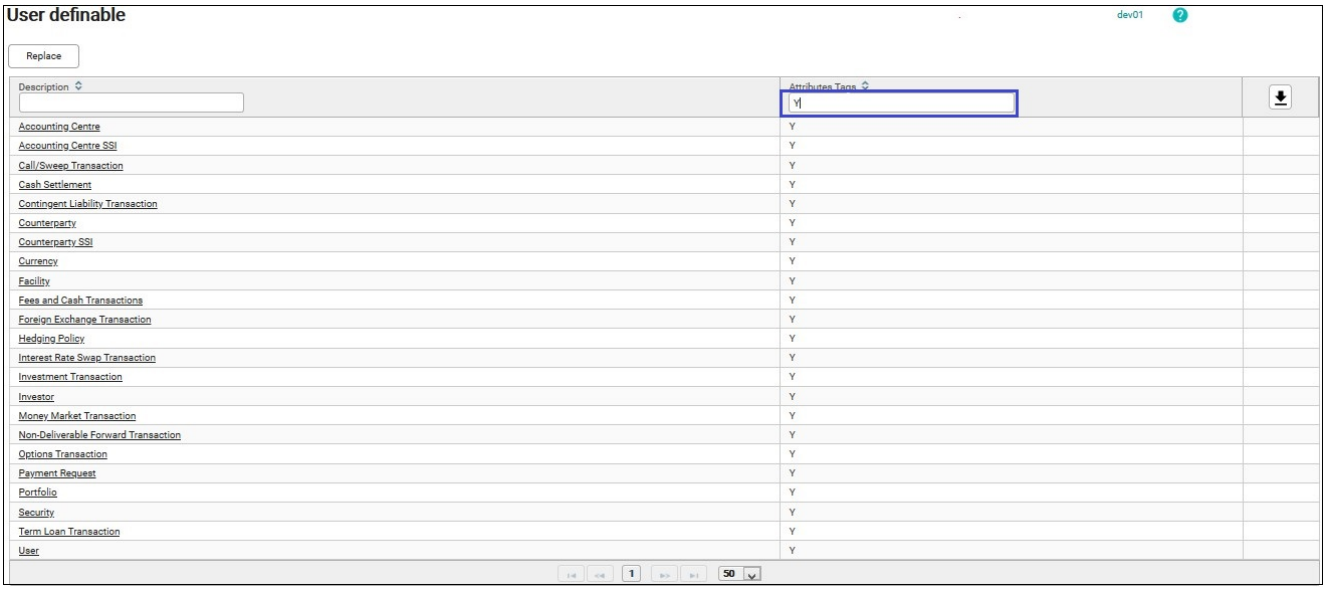
PROCEDURE

1. From the main menu, click Set Up > Global > User Definable.

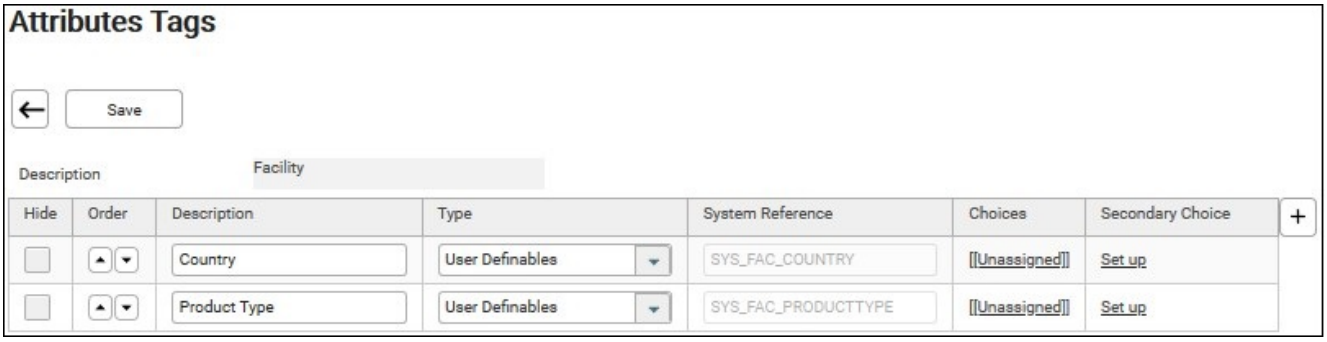
2. The User Definable screen displays.



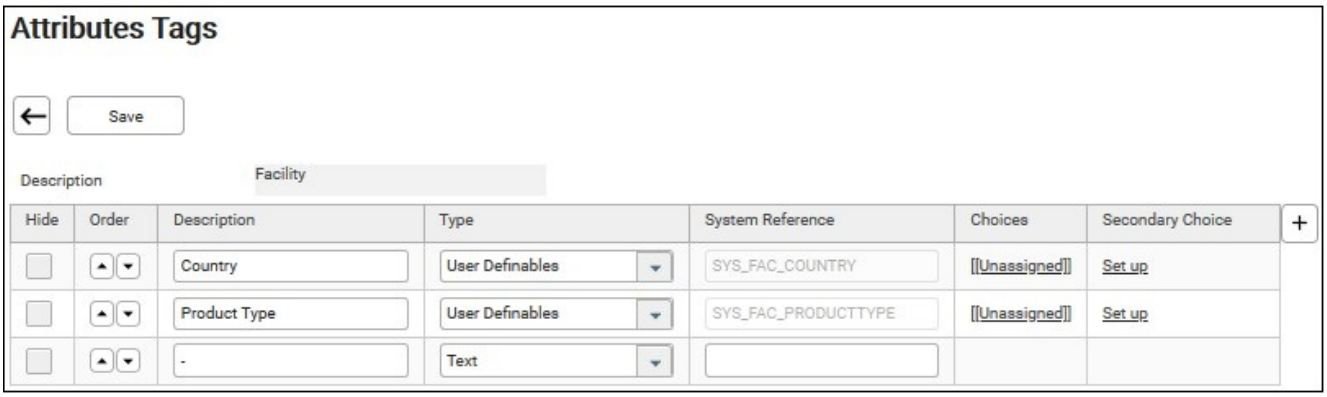
3. Put a “Y” in the Attribute Tags search box to search for transactions or static data that can create user attributes field.



4. Click on the description. E.g. Facility. The “Attribute Tags” screen of Facility displays.



5. Click Add Button to add new user attributes field.



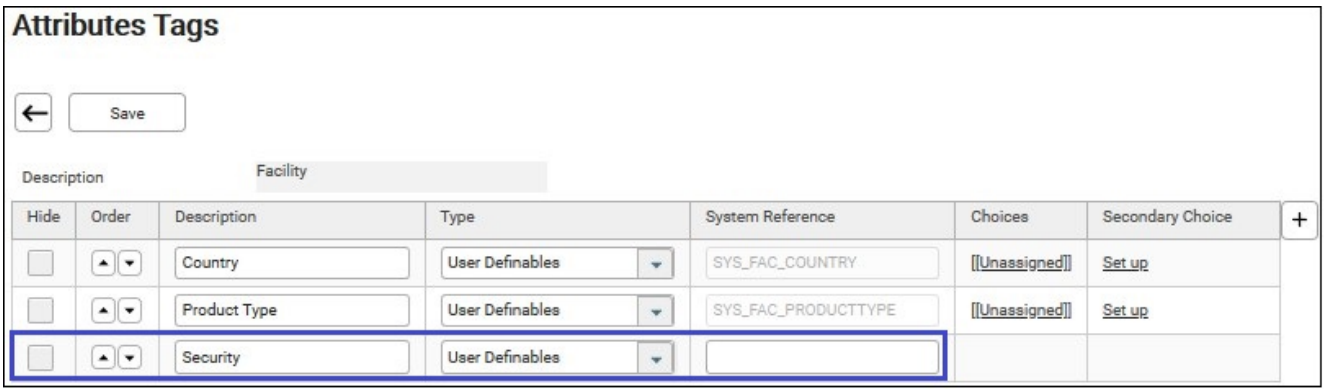
6. Key in the field caption under Description field.

7. Then, choose the types of field you wish to create in the Type drop down field.

The field types that you can select are as follows:

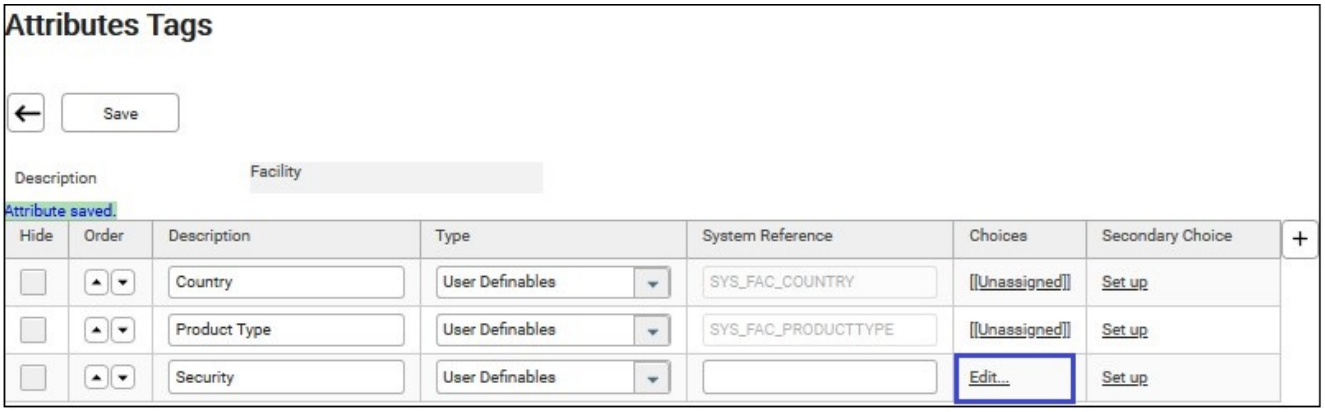
Type	Description
Date	This is a date type field.
Double	This is a double type field.
Integer	This is an integer type field.
Text	This is a text field.
User Definables	This is drop down selection field.

8. In this example, User Definables type is chosen.

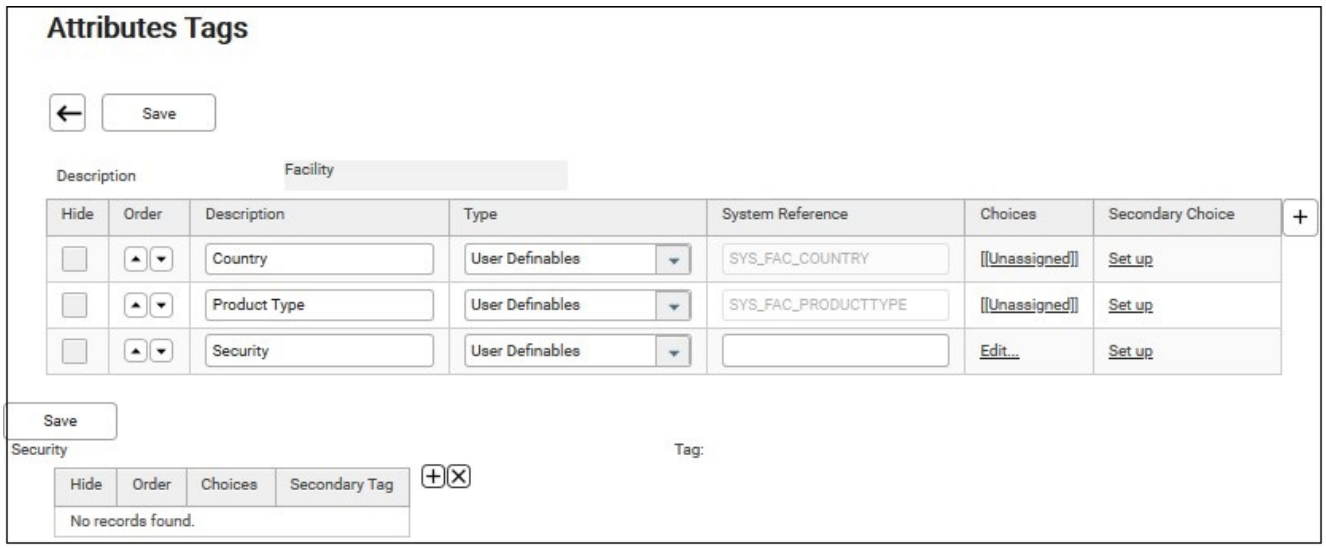


9. Click Save.

10. Next, to create the selection choices for the user definable field, click on Edit.

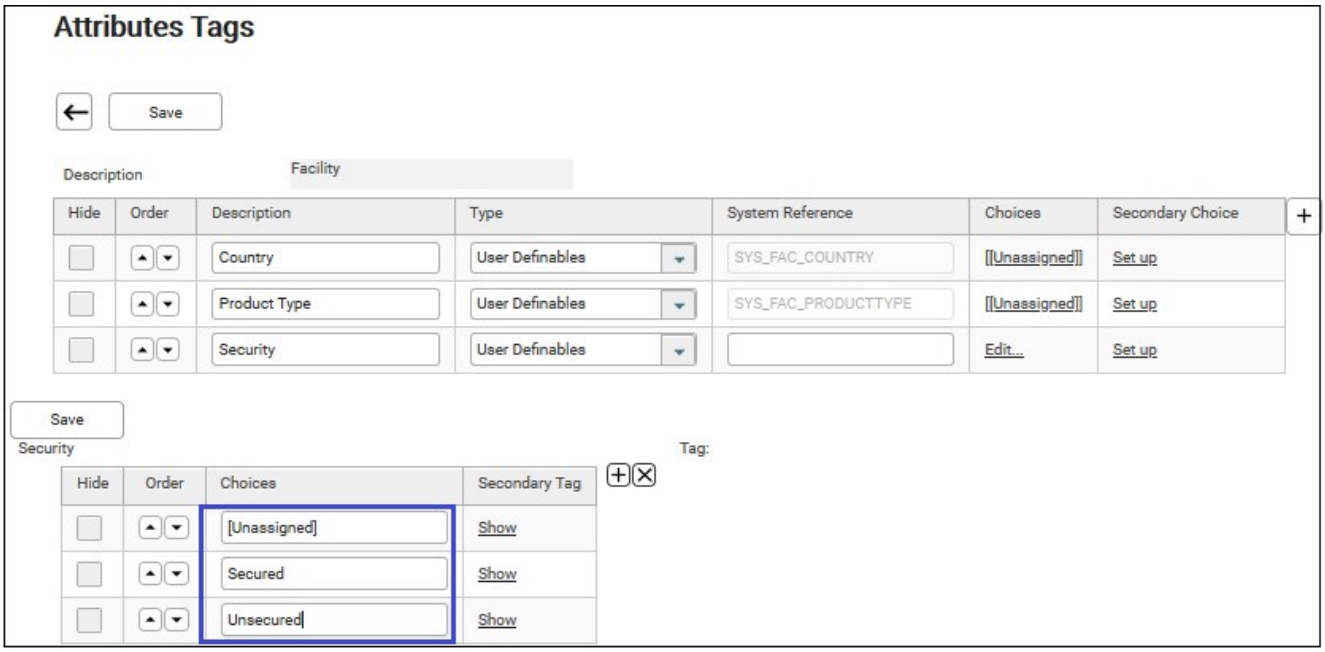


11. A section will appear underneath to maintain the choices for this attribute field.



12. Click Add Button to add the choices.

13. Always key in “[Unassigned]” as the first choice, then followed by the other choices. This is so that [Unassigned] will appear as the first choice in the newly created user attributes field.



14. Click Save when completed.

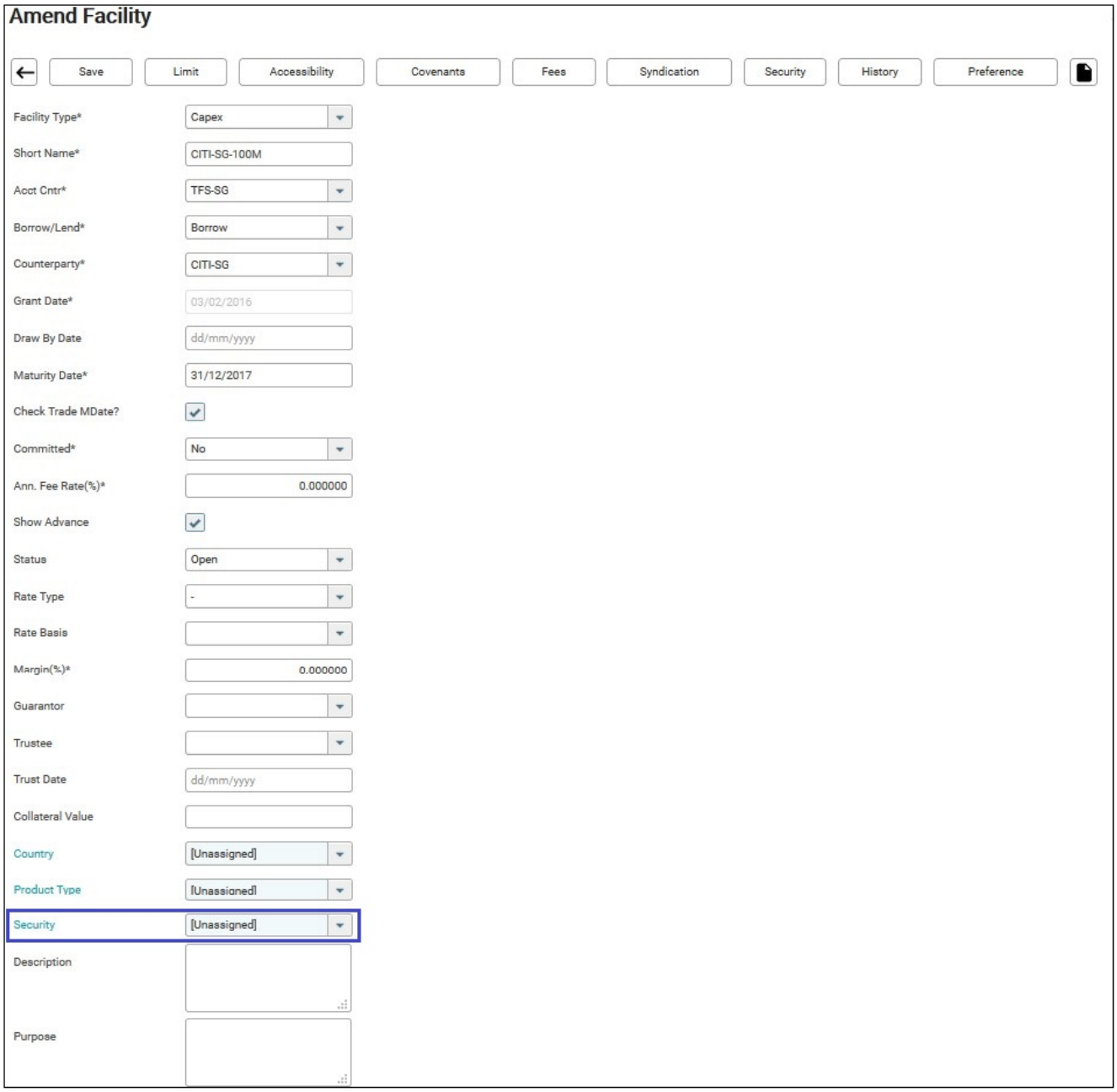
15. You will see a message showing attribute choices are saved.

16. Click Back Button to return to User Definable screen.

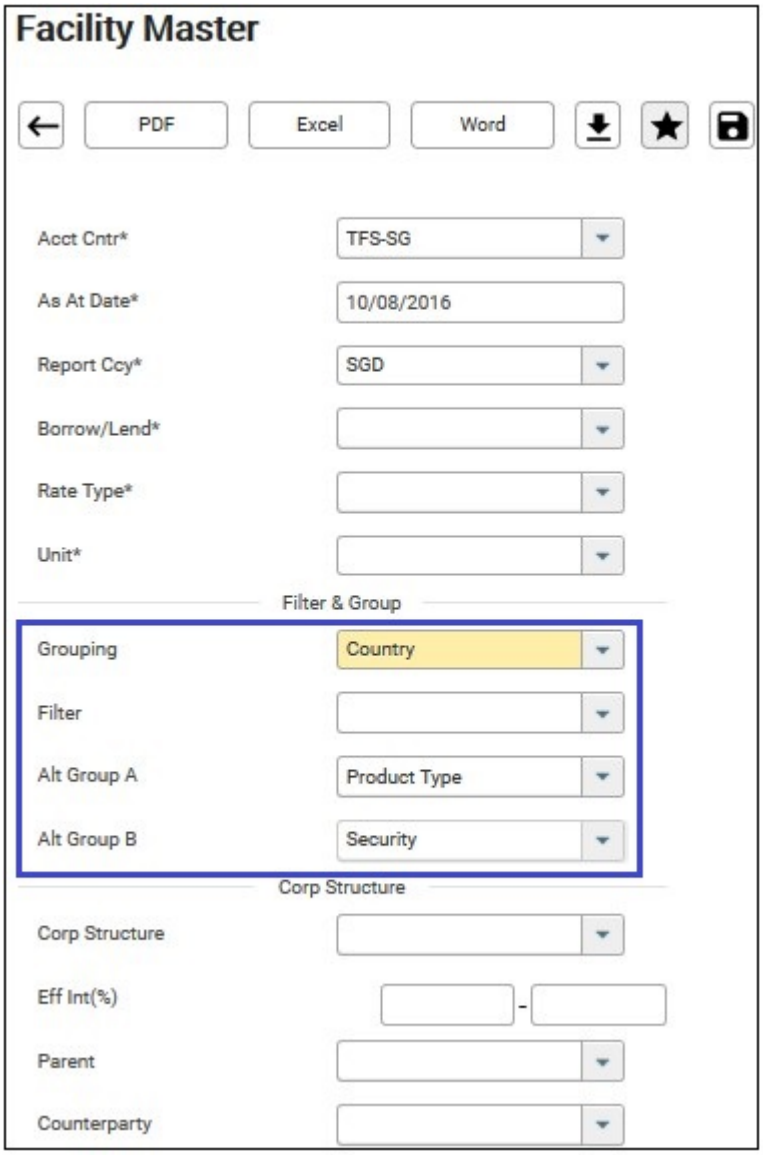
17. Navigate to Set Up > Risk > Facility.

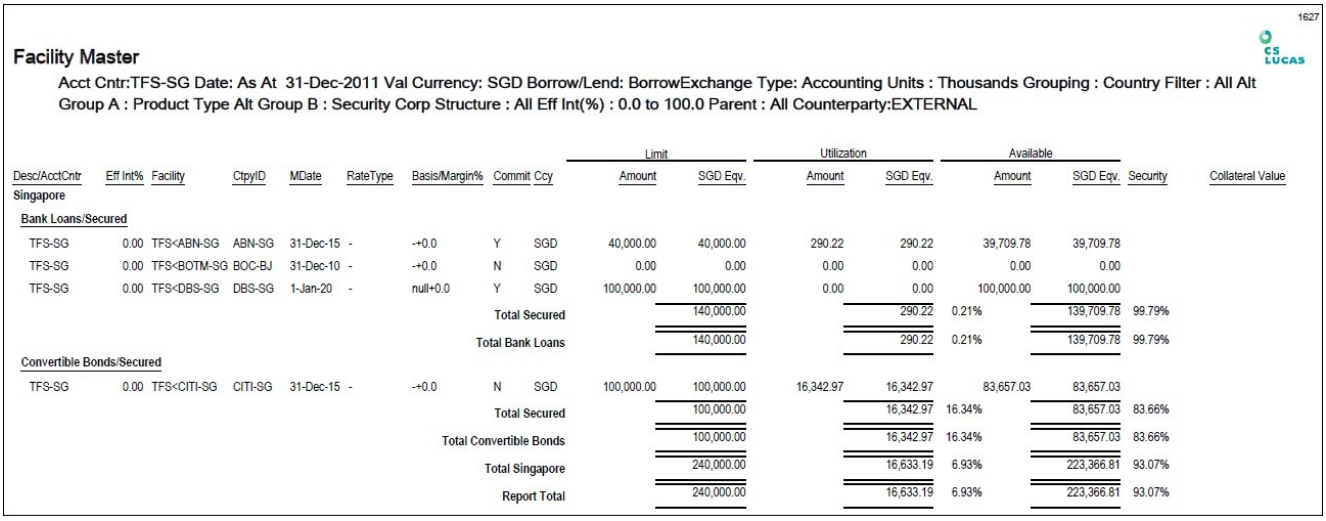
18. The system will show the new user attributes field in the New and Amend

Facility screen. See example in the Amend Facility screen below.



Note: User attributes fields are not standard fields in the system, hence any user attributes fields created will not be shown in the standard reports with the exception in some of the facility reports that allow report to be grouped by user attributes field but limited to three dimensions only, e.g. Facility Master (Rpt1627).





1627

Facility Master

Acct Cntr:TFS-SG Date: As At 31-Dec-2011 Val Currency: SGD Borrow/Lend: BorrowExchange Type: Accounting Units : Thousands Grouping : Country Filter : All Alt Group A : Product Type Alt Group B : Security Corp Structure : All Eff Int(%) : 0.0 to 100.0 Parent : All Counterparty:EXTERNAL

									Limit		Utilization		Available			
Desc/AcctCntr	Eff Int%	Facility	CtpyID	MDate	RateType	Basis/Margin%	Commit	Ccy	Amount	SGD Eqv.	Amount	SGD Eqv.	Amount	SGD Eqv.	Security	Collateral Value
Singapore																
Bank Loans/Secured																
TFS-SG	0.00	TFS<ABN-SG	ABN-SG	31-Dec-15	-	-+0.0	Y	SGD	40,000.00	40,000.00	290.22	290.22	39,709.78	39,709.78		
TFS-SG	0.00	TFS<BOTM-SG	BOC-BJ	31-Dec-10	-	-+0.0	N	SGD	0.00	0.00	0.00	0.00	0.00	0.00		
TFS-SG	0.00	TFS<DBS-SG	DBS-SG	1-Jan-20	-	null+0.0	Y	SGD	100,000.00	100,000.00	0.00	0.00	100,000.00	100,000.00		
								Total Secured		140,000.00		290.22	0.21%	139,709.78	99.79%	
								Total Bank Loans		140,000.00		290.22	0.21%	139,709.78	99.79%	
Convertible Bonds/Secured																
TFS-SG	0.00	TFS<CITI-SG	CITI-SG	31-Dec-15	-	-+0.0	N	SGD	100,000.00	100,000.00	16,342.97	16,342.97	83,657.03	83,657.03		
								Total Secured		100,000.00		16,342.97	16.34%	83,657.03	83.66%	
								Total Convertible Bonds		100,000.00		16,342.97	16.34%	83,657.03	83.66%	
								Total Singapore		240,000.00		16,633.19	6.93%	223,366.81	93.07%	
								Report Total		240,000.00		16,633.19	6.93%	223,366.81	93.07%	

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[How to Create User Definable Field]

CHANGE HISTORY

Date	By	Changes
28-Jan-2016	TS	Created.
25-Aug-2018	Silpa	Updated 1, 17.
27-Nov-2019	Lyra	Updated Screenshots.