User Attributes Field

See previous W5 version guide

PURPOSE

This document contains the procedure for creating user attributes fields.

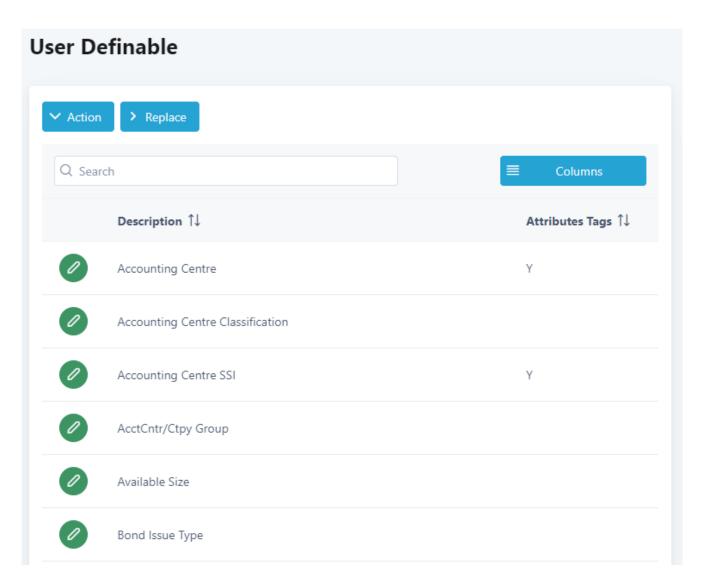
WHY IS THIS IMPORTANT?

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.

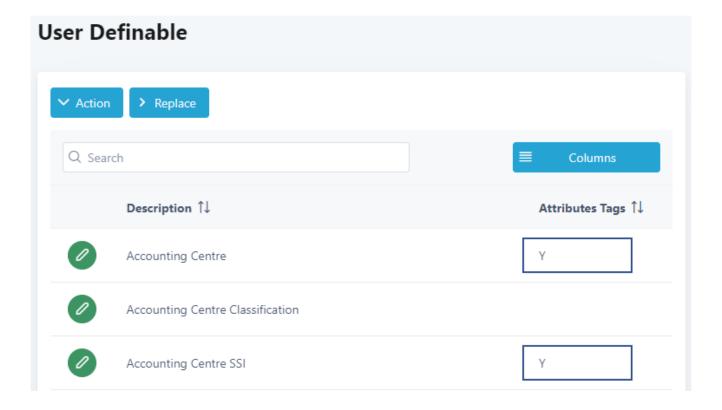
PROCEDURE



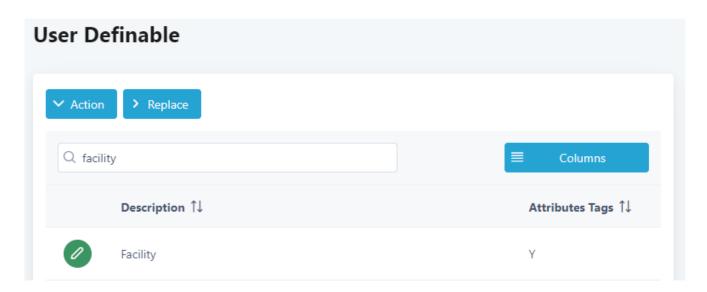
- 1. From the main menu, click Set Up > Global > User Definable.
- 2. The User Definable screen displays.



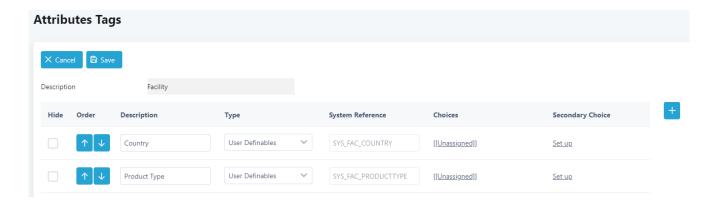
3. Look in the list with attribute tags = "Y".



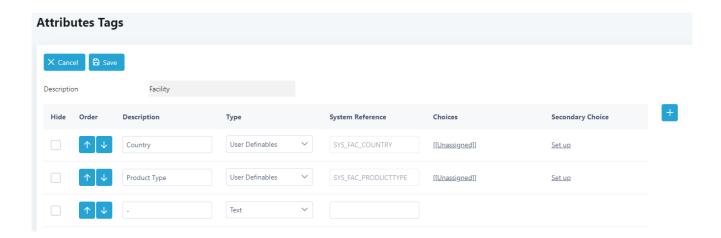
4. In this example, Facility is chosen. Click on the Edit button next to the description.



5. The "Attribute Tags" screen of Facility displays.



6. Click Add button to add new user attribute field.

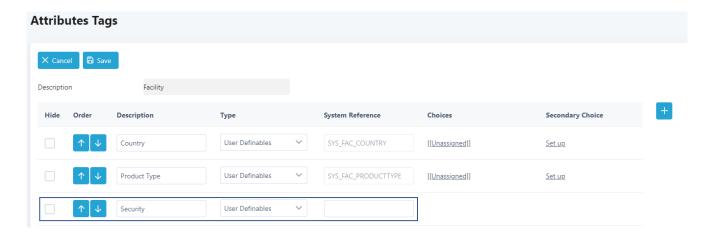


- 7. Key in the field caption under Description field.
- 8. Then, choose the types of field you wish to create in the Type drop down field.

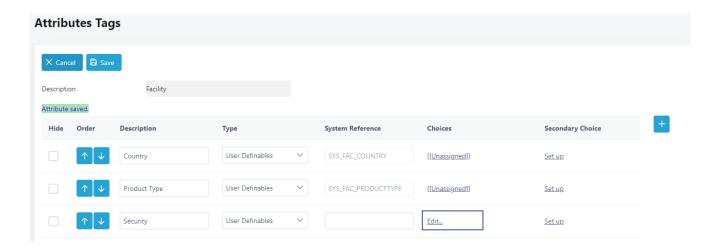
The field types that you can select are as follows:

Туре	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.

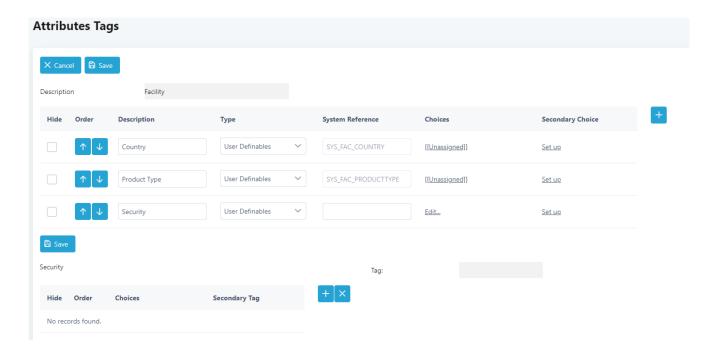
9. In this example, User Definables type is chosen.



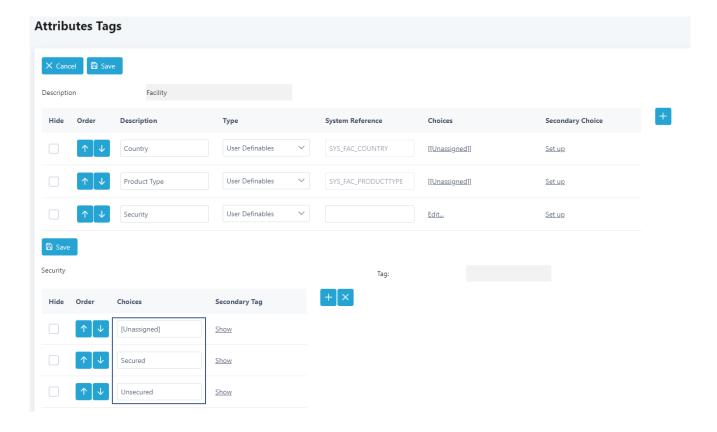
- 10. Click Save.
- 11. Next, to create the selection choices for the user attribute field, click on Edit.



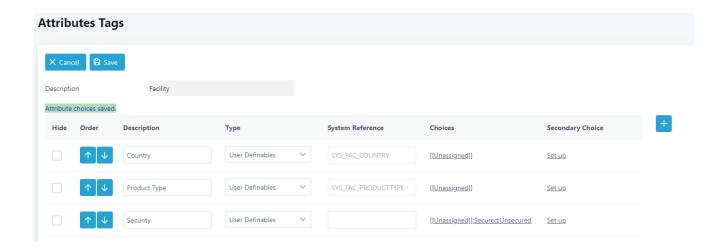
12. A section will appear underneath to maintain the choices for this attribute field.



- 13. Click Add button to add the choices.
- 14. 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 attribute field.

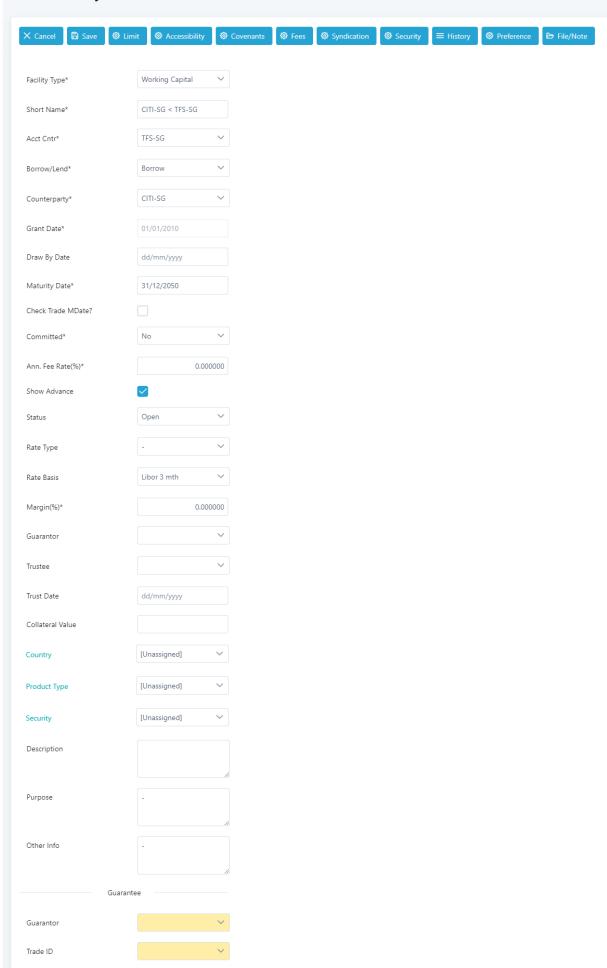


- 15. Click Save when completed.
- 16. You will see a message showing attribute choices are saved.



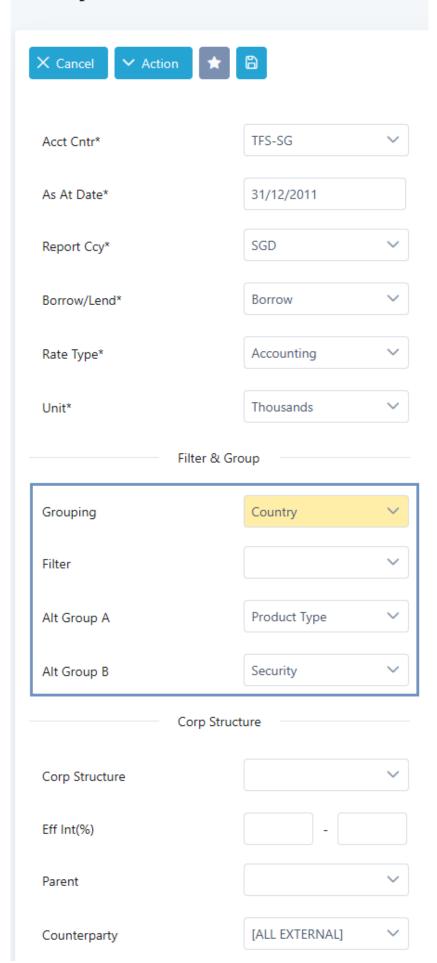
- 17. Click on Cancel button to return to User Definable screen.
- 18. Navigate to Set Up > Risk > Facility.
- 19. The system will show the new user attributes field in the New and Amend Facility screen. See example in the Amend Facility screen below. Attribute fields are in teal colour.

Amend Facility



Note: User attribute fields are not standard fields in the system, hence any user attribute 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 attribute fields but limited to three dimensions only, e.g. Facility Master (Rpt1627).

Facility Master



Grou	p A : Product Type	Alt Gr								pe: Accounting	_				
		o / ac Oil	oup B : S	ecurity (Corp Structu	re:	All Eff Int((%): 0.0 to 10	00.0 Parent :	All Counterpa	rty:EXTEF	RNAL			
							_	Limit		Utilization		Available			
Desc/AcctCntr Bingapore	Eff Int% Facility	CtpyID	MDate	RateType	Basis/Margin%	Com	mit Ccy	Amount	SGD Eqv.	Amount	SGD Eqv.	Amount	SGD Eqv.	Security	Collateral Value
Bank Loans/S	ecured														
TFS-SG	0.00 TFS <abn-sg< td=""><td>ABN-SG</td><td>31-Dec-15</td><td>-</td><td>-+0.0</td><td>Υ</td><td>SGD</td><td>40,000.00</td><td>40,000.00</td><td>290.22</td><td>290.22</td><td>39,709.78</td><td>39,709.78</td><td></td><td></td></abn-sg<>	ABN-SG	31-Dec-15	-	-+0.0	Υ	SGD	40,000.00	40,000.00	290.22	290.22	39,709.78	39,709.78		
TFS-SG	0.00 TFS <botm-s< td=""><td>BOC-BJ</td><td>31-Dec-10</td><td>-</td><td>-+0.0</td><td>N</td><td>SGD</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td><td></td><td></td></botm-s<>	BOC-BJ	31-Dec-10	-	-+0.0	N	SGD	0.00	0.00	0.00	0.00	0.00	0.00		
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						Tota	Secured	_	140,000.00	· ·	290.22	0.21%	139,709.78	99.79%	
					To	otal Ba	nk Loans	_	140,000.00	_	290.22	0.21%	139,709.78	99.79%	
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TFS-SG	0.00 TFS <citi-sg< td=""><td>CITI-SG</td><td>31-Dec-15</td><td>-</td><td>-+0.0</td><td>N</td><td>SGD</td><td>100,000.00</td><td>100,000.00</td><td>16,342.97</td><td>16,342.97</td><td>83,657.03</td><td>83,657.03</td><td></td><td></td></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		
						Tota	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%	
								=	240,000.00	_	16,633,19	6.93%	223,366,81	93.07%	
							Singapore	-		-	- 10	_			
						Re	port 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	Ву	Changes
28-Jan-2016	TS	Created.
25-Aug-2018	Silpa	Updated Step 1, 17.
27-Nov-2019	Lуга	Updated screenshots.
29-Mar-2023	TS	Updated to W6 instructions and screenshots.