



Setting Up User-Defined Fields in OSAS 7.52

We find that our clients sometimes have the need to store additional data in addition to the existing OSAS data fields. Due to lack of knowledge of User Defined Fields, they end up putting it into “unused” fields, such as unused address lines, or unused web and email addresses. Eventually, this can cause problems with data conversion or the need to implement a new capability.

User Defined Fields (“UDFs”) were created to address such data storage needs. They are simple to implement, and both the fields and data they contain will be migrated to new software levels when upgrades are installed.

Remember that Sample Data are available (<F5>) if you want to see UDFs that have been already set up or to test setup on your own.

To add a User Defined Field:

1. Go to Resource Manager, Installation and Configuration, User-Defined Fields.
2. Enter an Application ID, or use the lookup (<F2> or mouse-click) to display valid values.
3. When OSAS requests “File”, use the lookup (<F2> or mouse-click) to display the file options. In most cases, UDFs can be added to masterfiles: Customer Masterfile, Employee Masterfile, Inventory Masterfile, Vendor Masterfile, etc.
4. The display screen will be formatted with numbers down the left side. These correspond to line numbers on the UDF display screen. The “>” symbol will identify which line has focus, and the up/down arrow keys will move the “>” symbol up and down the lines.
5. To add or modify a field, simply position the “>” symbol on the line to be edited and depress <ENTER>. For “Prompt”, type the description which should be associated with the UDF field. For “Type”, use the lookup option to display a list of valid options:

- 01 String – alpha or numeric characters, including special (% , \$, # , etc.) characters
- 02 Masked String – will display a “mask” (format) for data entry
- 03 Uppercase – will auto-convert any lower case characters to upper case
- 05 Yes/No – Only a Yes, No, Y or N are valid entries
- 06 Date

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10 Period – GL period

11 Year

12 Period/Year

Note that changing a Type on an existing field may display an operator warning that existing data will be cleared. In the event of such warning, you can exit without your changes taking effect by pressing the <F5> key or clicking the “Abandon” button. Pressing <ENTER> or “OK” will clear all data for the field following such message. If it is necessary to change a field Type and you wish to retain the existing data, contact Adaptive Business Solutions for assistance before revising a data Type.

6. Enter the Length of data for the field. Certain data Types have a predetermined field Length (Yes/No, Date, Period, Year and Period/Year) and will not permit the operator to change the field Length.
7. (Optional) Certain data types will request entry of a System Mask. If this option is presented, use the <F2> or lookup option to select a system mask. Using a System Mask may revise the previously-entered field length. For example, a Date field is always a length of 10, a Yes/No field Type is always a field length of 3, etc.
8. (Optional) Certain combinations of UDF field selections will permit entry of a user-specified Mask. For numeric fields, this may be a combination of number signs, zeros, dollar signs, negative signs, decimals and other values. See the Business Basic Reference Manual for a complete list of options, or contact Adaptive Business Solutions support staff if you require assistance.

The Move and Swap commands will reformat the data presentation (sequence) and will also automatically transfer user data to, or between, the moved/swapped fields so that no data is lost. Depending on the amount of data, this capability may require some time to revise the stored data accordingly.

Blank lines (lines with no Prompt or other fields entered) can be left to make the UDF screens easy to read.