

Managing User Defined Fields (UDFs)

[Contact Species360 Support](#)

UDFs are managed under the Overview menu in a studbook. All UDFs from legacy software will migrate to the studbook.

Topics:

- [Adding UDFs](#)
- [Types of UDFs](#)
- [Editing UDFs](#)
- [Deleting UDFs](#)

UDFs display at the bottom of the Studbook Overview screen:



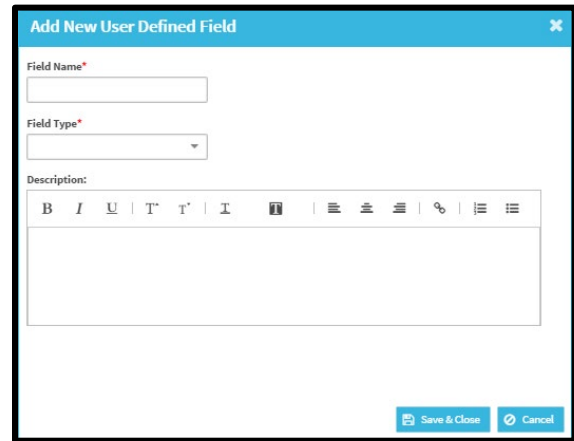
	UDF Name	Created Date	Created By	
<input type="checkbox"/>	Incubation	Feb 23, 2017	Adrienne Miller	Add New
<input type="checkbox"/>	Egg Lay Date Estimate	Feb 23, 2017	Adrienne Miller	
<input type="checkbox"/>	EXCLUSIONS	Feb 23, 2017	Data Migration Process	

- Using the “+” icon button you can Add new UDFs.
- Double click on existing UDFs to edit.
- UDFs must be defined in this location in the Overview Screen prior to entering the UDF for an individual animal.
- UDF Name, created date, date created by display and list is sortable
- Hover over notes icon on the left to view notes about the UDF without opening the record.

Adding UDFs

Select “+” icon to add a new UDF - To add new UDF the following is required:

- **Field Name:** Name of the UDF
- **Field Type:** Two options
 - **Combo Box:** User defines the UDF values that display when adding a UDF to an animal. (highly recommended).
 - **Text Field:** There are no defined UDF values, the user can enter any text in the UDF value.
 - User cannot add UDFs with the same name and Field Type to Studbook.

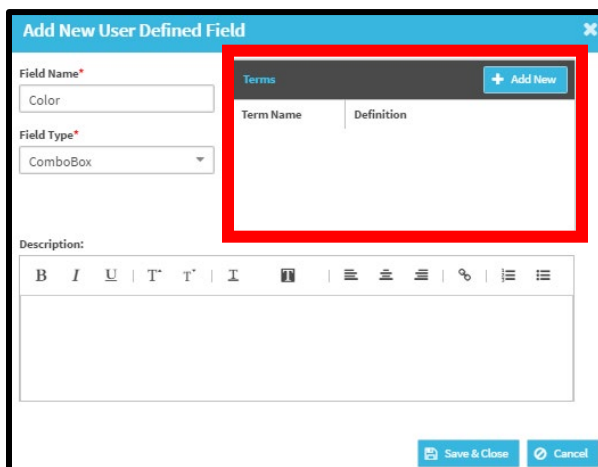


Depending on the Field type chosen, the screen will change. Species360 highly recommends using the Combo Box option for standardization.

[Back to Topics](#)

Types of UDFs

1. Combo-Box



When user selects to add a UDF with a combo box, they must enter the terms they would like to display in the animal records for this UDF type.

- User can define as many terms as needed by selecting the “add new button”
- User cannot enter duplicate term types
- Term Name is required
- Term Definition: Optional but highly recommended. This allows the user to define the term so if the studbook passes hands the next user will understand how the UDFs were applied.

Example:

- UDF Name = Color
- Field Type = Combo Box
- Terms = Orange, Black, White, Tan, Brown
- Definition = user can define what each term means
- Description = user can enter additional notes about UDF overall.
- Must select Update to save
- All terms entered on this screen will be dropdown options when assigning the UDF “Color” to an animal in the studbook.

Adding more options for defining UDFs and notes, should make tracking of UDFs through time and easier as a studbook changes Studbook Keepers.

2. Text Box

When user selects to add a UDF as a text field, they do not need to define terms.

- When entering a text field UDF for an animal, the user can enter any free text.
- This can cause bad data entry and we recommend only using free text UDFs when absolutely necessary (example: tracking numbers that cannot be defined)

Text Field Example:

- UDF Name = Color
- Field Type = Text Field
- No Terms or Description needed
- User will be able to enter any text in the “Color” UDF in the animal’s records
 - Example: Orange, Green, Geren, Blue, Education...
 - System will not check for definition

[Back to Topics](#)

Editing UDFs

User Defined Fields			
	UDF Name	Created Date	Created By
<input type="checkbox"/>	EXCLUSIONS	Mar 29, 2018	Data Migration Process
	Program Animal	Jan 15, 2019	Katelyn Mucha
	Incubation	Jan 15, 2019	Katelyn Mucha

Select and double click on the UDF and the view/edit screen will open.

- **Field Name:** Editable - any change here changes the name throughout the system.
- **Field Type:** Not editable. Once chosen this cannot be changed.
- **Term Name:** Editable - User will receive a warning if they try to edit a Term Name.
 - If user chooses to edit the Term Name, all historic records in the studbook with the old term name will be changed to the new term name.
- **Description:** Editable.

Terms	
Term Name	Definition
Black	Fur is Black
Orange	Fur is orange

[Back to Topics](#)

Deleting UDFs

Delete is not an option at this time for a defined UDF. This is to assure that the historical UDFs remain intact. If a user deleted a UDF from this screen, it would remove all UDFs in the animal records for that UDF.

Please contact support@species360.org if there is a UDF you would like deleted from your studbook.

[Back to Topics](#)

Revised 11 November 2021