Generic and Custom Fields

New Standard Re...elds Fluxx.pptx
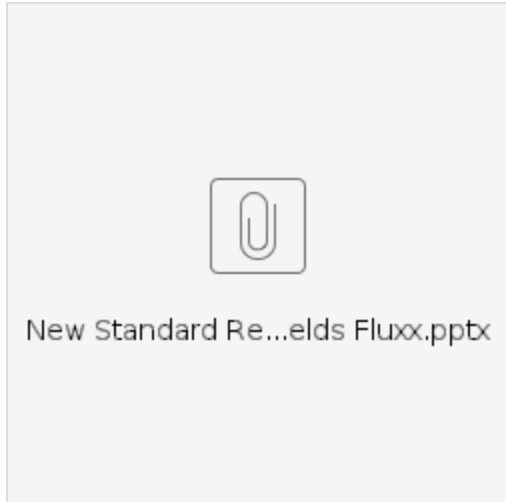
What are custom fields

Custom fields are fields that we create for a record type in addition to the fields the record type is already providing.

Some times we need a field to track information that is not already in the system. For this purpose, a system admin creates an additional field with certain format.

Issues

A lot of custom fields slow down the system.

The maximum fields we can have while keeping in a reasonable performance is ~250 per record type.

When we create a custom field, we give it a database name and a label name. The database name is not very human readable (usually looks like: social_determinants_of_health, e.g.). After a while, it can become unclear what the original purpose of that field was.

We are not keeping track of the fields and their purposes. Any new person would not know what the previously created fields are right off the bat.

We have created a lot of custom fields.

We have a large number of forms for the same review stage, because they have different fields in them.

Solutions

Generic fields are created for re-usability and ease of operations. Each field type has its own set of generic fields.

Labels for the generic fields is being tracked and recorded in shared drive:

N:\ADMIN\WI Partnership Program\Evaluation & Planning\Generic Form Fields

In the folder, there are form reports and also an excel spreadsheet per year. This excel has one tab per review form and it has all the fields that we have used recorded neatly.

This is helpful to simplify searches and views and slowly retire the old fields and forms.

This solution has been tested successfully.

Notes

When running a search/report/view, we just need to remember what generic field we are looking for based on the spreadsheet in our shared drive.

It appears the drive spreadsheet hasn't been kept up to date. The workaround (and an all-around helpful tip when analyzing field usage) is to export these fields.

1. Select Live Reports > Audit Report

2. Choose the model and fields to export
    - DO NOT export the whole data model–it might not even generate if you include too much.
    - Date filters are optional