

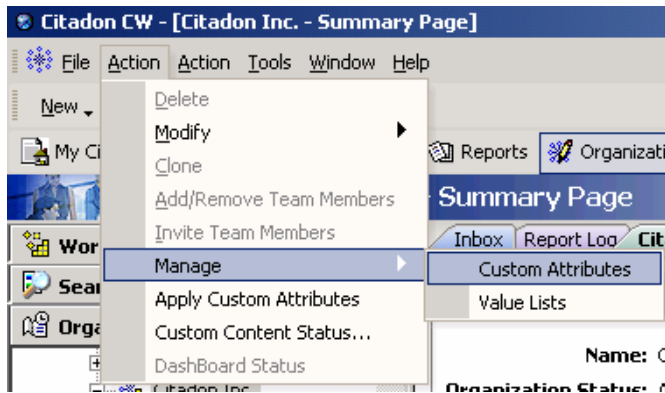
## Creating Custom Attributes

Only users with administrative or Full Control privileges in an Organization or a Workspace can add or modify custom attributes.

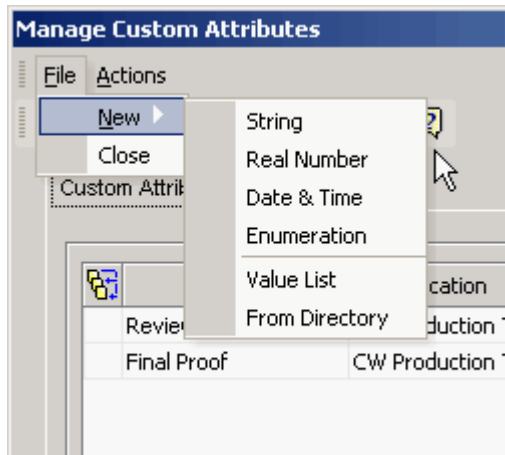
### Base Attributes

To create a custom attribute:

1. Select the desired Organization or Workspace under the appropriate Administration tab



2. Select **Action->Manage->Custom Attributes** from the menu at the top. The Manage Custom Attributes screen is displayed

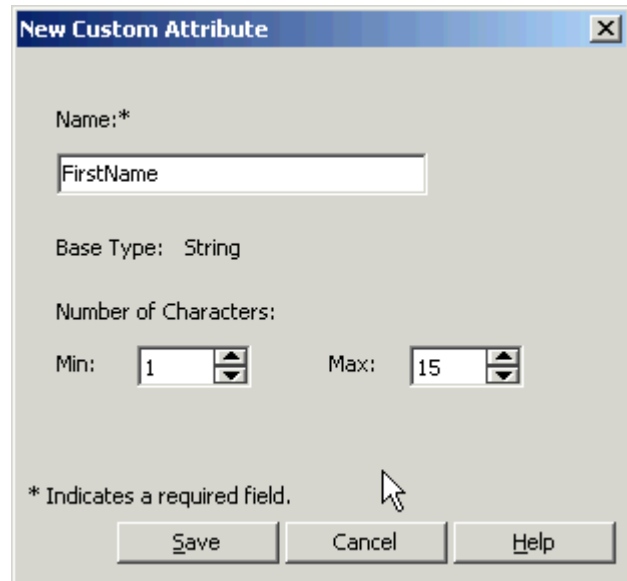


3. Select File->New to see the list of attribute types available. There are four base types:

<b>String</b>	Alphanumeric text
<b>Real Number</b>	Numeric values
<b>Date &amp; Time</b>	Date only or Date and Time values
<b>Enumeration</b>	Select a value from a predefined list

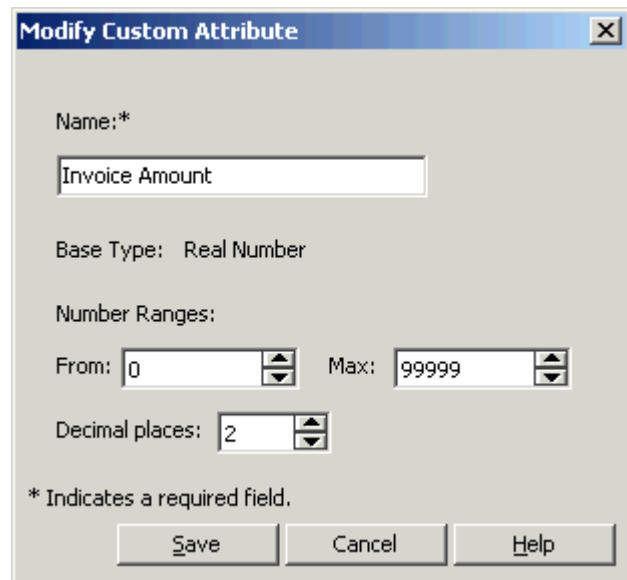
New->From Directory is discussed in the Applying Custom Attributes Quick Reference Guide

### String Attributes



- > Enter the name of the attribute
- > Select the minimum and maximum size of the string
- > Click **Save** to save the attribute

### Real Number



- > Enter the name of the attribute
- > Select the range of permissible values and the number of decimal places to display for the attribute
- > Click **Save** to save the attribute

### Date & Time

- Enter the name of the attribute
- Select either Date Only or Date Time from the pulldown list. The default is Date Time
- Click **Save** to save the attribute

### Enumeration Attributes

- Enter the name of the attribute
- Click **Associate...** to associate this attribute with an existing value list

**Note:** The desired value list must already exist in the system

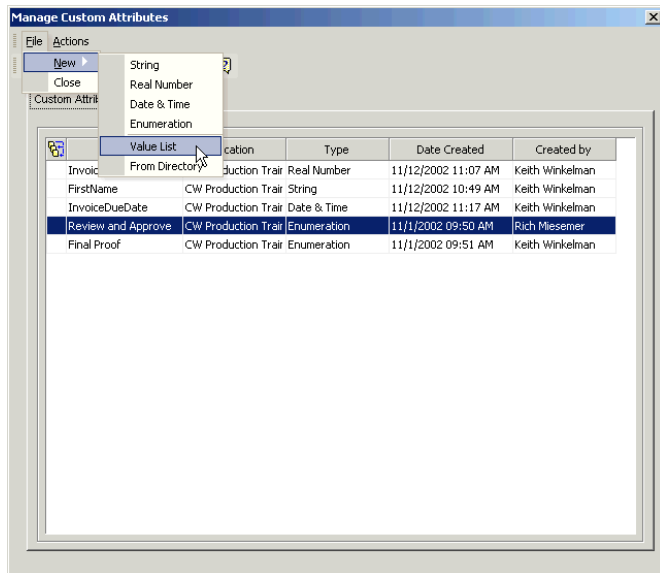
- Click **Browse** on the Select Value List screen to display the available value lists defined for this workspace or organization.
- Select the desired value list and click **OK** to associate the selected value list with the attribute

The value list is displayed.

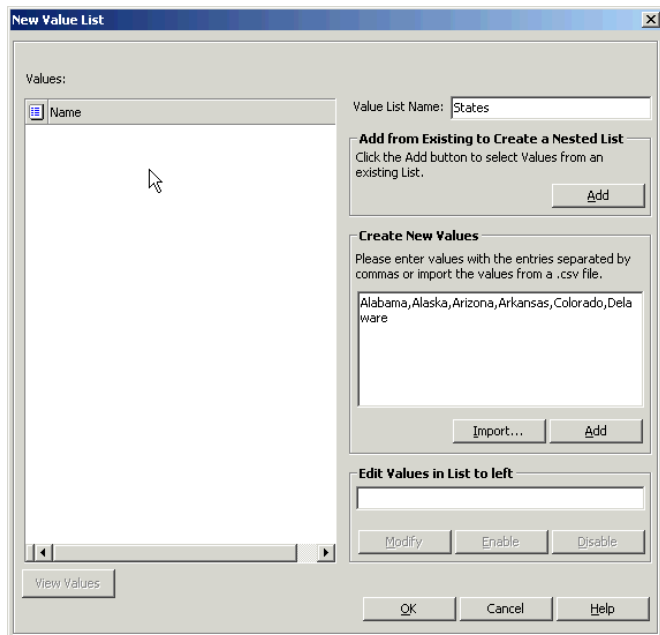
- Confirm that this is the desired value list and then click **OK** to confirm the selection

### Value Lists

A value list is the collection of values that can be used by an Enumeration custom attribute and by Dependent Custom Attributes



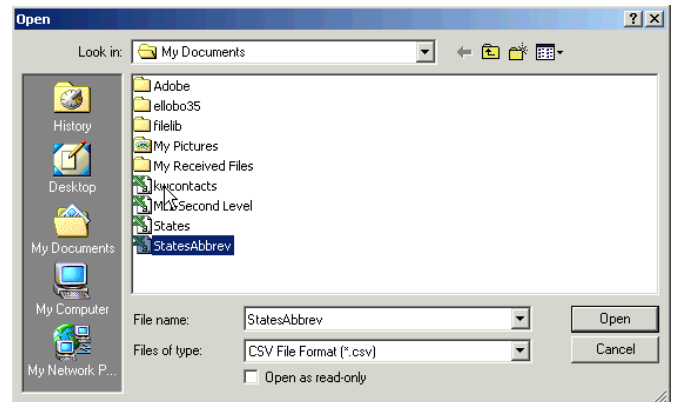
- Select **File->New->Value List** from the Manage Custom Attribute Screen.



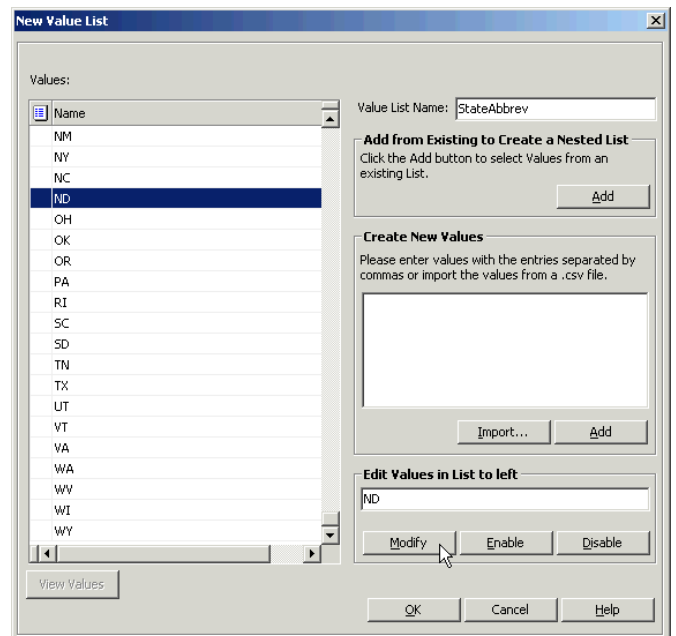
- Enter a unique name in the Value List Name field
- Add the values to be included in the list in the Create New Values box, separated by commas.
- Click **Add** to add them to the list

You can also import a value list from a .csv file.  
**Note:** The ~ character (tilde) cannot be used in either value list names or values.

- Click **Import...** to import a .csv file.



- Select the file to be imported and click **Open** to import the file.
- Once the file has been imported, Click **Add** to add the imported values to the list



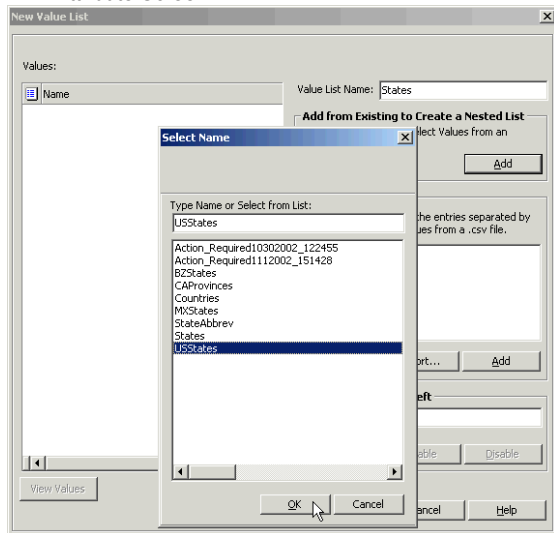
- Values in the list can be edited. Highlight the desired value and make the edit in the Edit Values box on the bottom right.
- When complete, click **Modify** to apply the edit.
- Individual values can also be disabled or enabled by highlighting the desired value and clicking either **Disable** or **Enable**.
- When the list is complete and accurate, click **OK** to confirm the selection.

**Note:** You can delete value list values in create mode, but not in modify mode. However, you can always disable a value if you do not want it to be available to end users following creation.

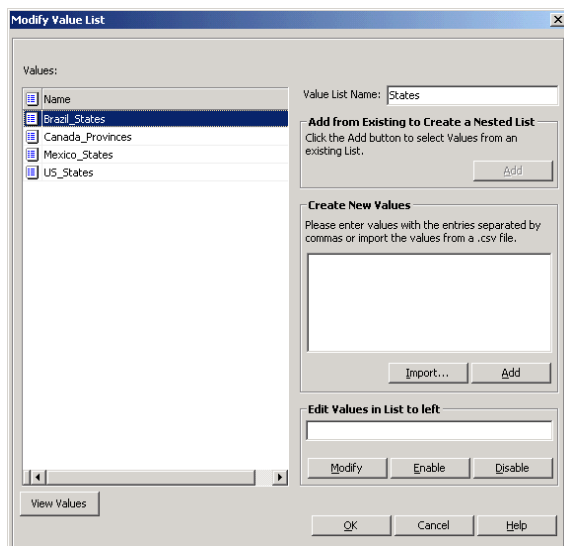
### Nested Value Lists

Values lists can be nested to facilitate more efficient management of dependent custom attributes. The value lists to be nested must already exist.

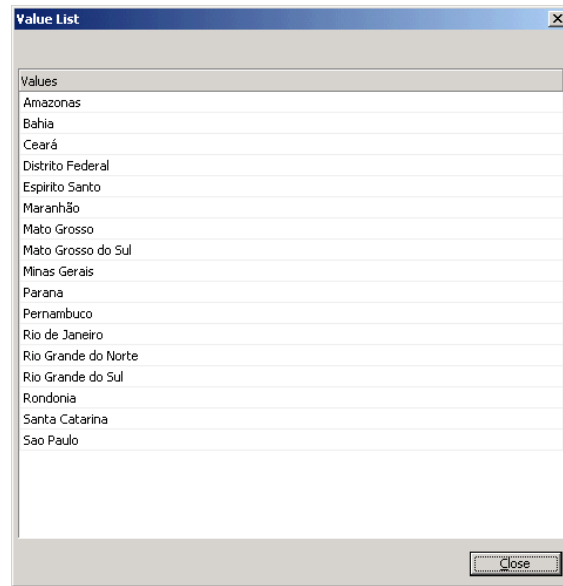
- Select **File->New->Value List** from the Manage Custom Attribute Screen.



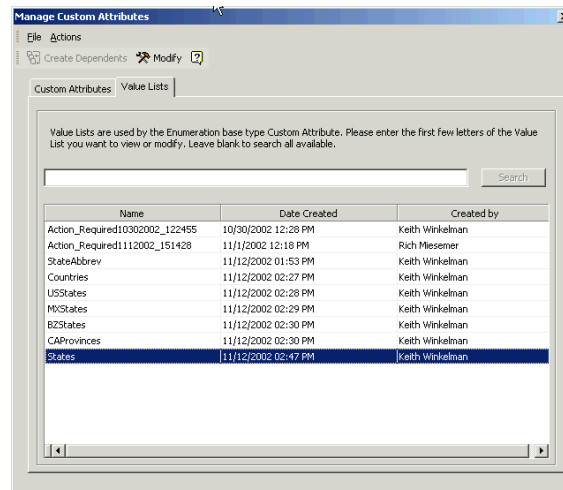
- Enter a name in the Value List Name field
- Under **Add to Existing to Create a Nested List** click **Add** to see the existing value lists
- Select the desired list and click **OK** to nest it.



- If you want to see the contents of any of the nested lists, simply click **View Values** to view the list, as shown below.



- Repeat the steps above for each of the lists to be nested.
- When finished, click **OK** to create the nested list



The nested list can be modified by double clicking on it which will return you to the Modify Value List screen

### Dependent Attributes

Dependent attributes are enumeration attributes that are associated with each other in such a way that one must be selected before the next can be selected. An example is a country must be selected in one field before a state can be selected in the next; a state must be selected before a town, etc. Nested value lists are an important part of dependent attributes.

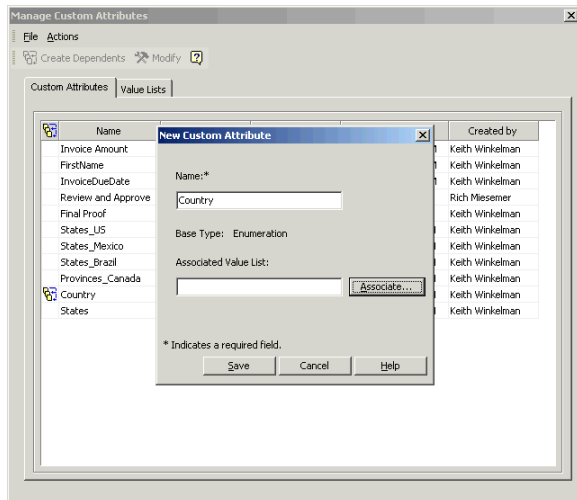
Before the dependent attribute association can be created, all the parts to be associated must be defined. Instructions are above.

- Create the value lists that represent each level of items to be selected (For example: US States, Mexico States, Countries)
- Create the nested value lists for those items (For example: All States – which contains the individual states lists above)

- Create the Enumeration attributes that reference those value lists (For example: States to reference the All States value list; Countries to reference the Countries value list)

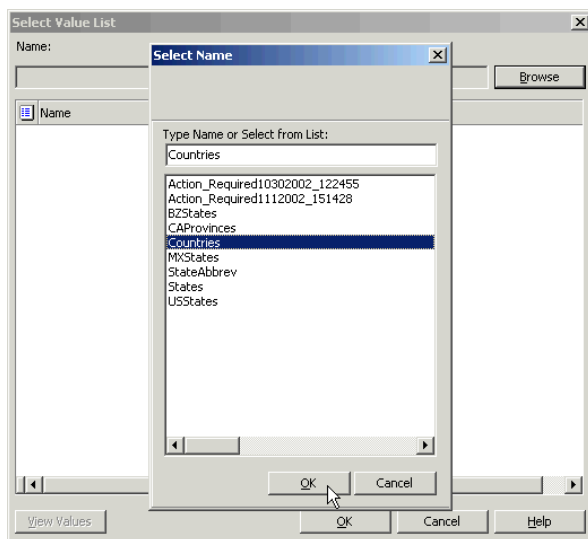
### Create the Attribute

Creation of dependent attribute associations begins like any other enumeration attribute.

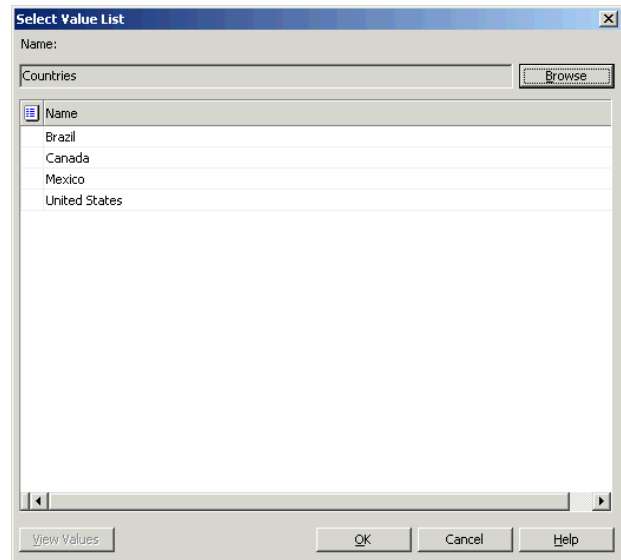


- Enter the unique name of the attribute.
- Click **Associate...** to associate this attribute with an existing value list.

**Note:** All desired value lists must already exist in the system.



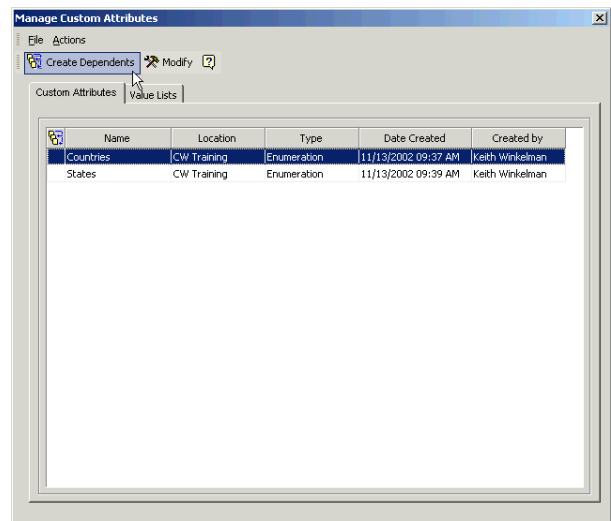
- Click **Browse** on the Select Value List screen to display the available value lists defined for this workspace or organization.
- Select the top-level value list and click **OK** to associate the selected value list with the attribute.



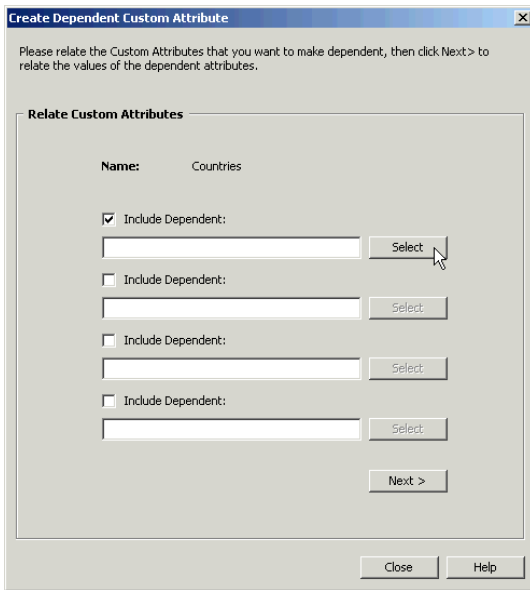
- Confirm that this is the desired value list and then click **OK** to confirm the selection
- Repeat these steps to create enumeration attributes for the attributes that are to be dependent. In this example, we created a States attribute containing the nested state value lists)


### Create the Dependency

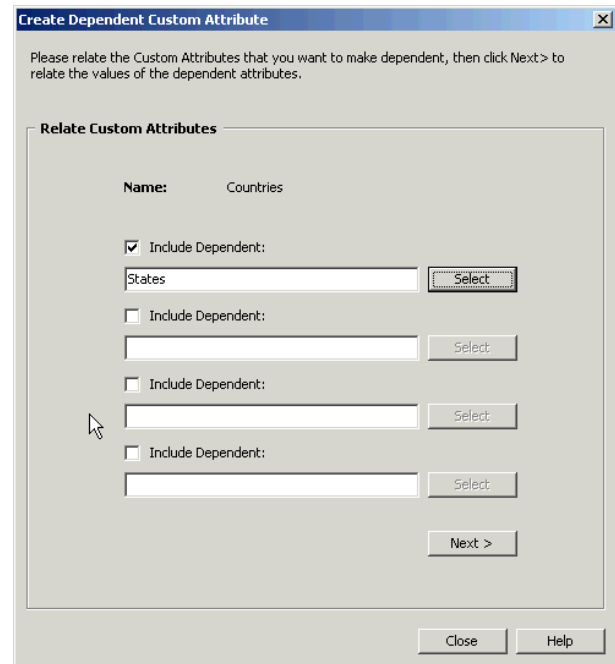
Now that the attribute is created, it must be associated with its dependents




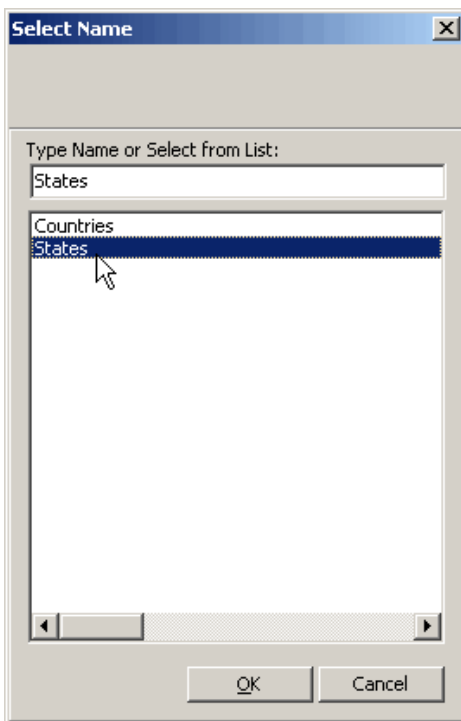
- From the Manage Custom Attributes screen, select the desired top level attribute and click **Create Dependents** from the tool bar

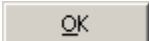


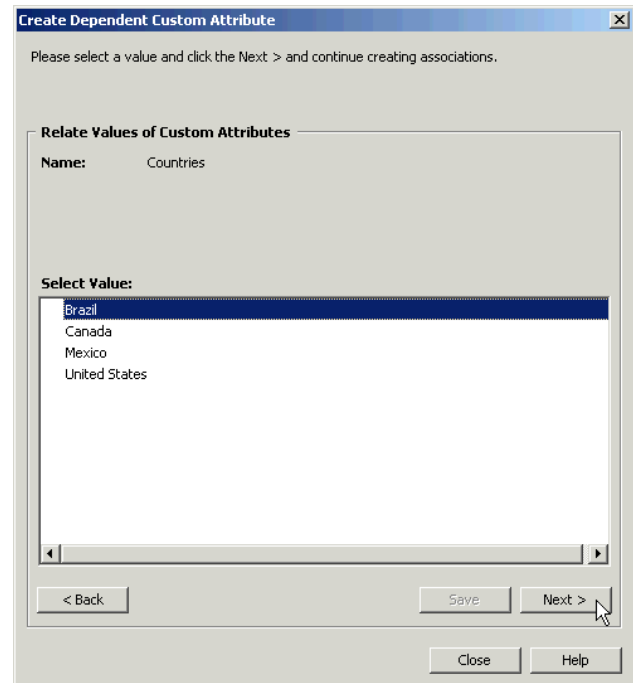
- From the Create Dependent Custom Attributes dialog, click the Include Dependent checkbox and then click .

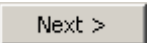


- With the attribute selected, click  to set the relationship between the selections.



- Select the name of the dependent attribute to be used and click .



- Select the first value on the list and click .

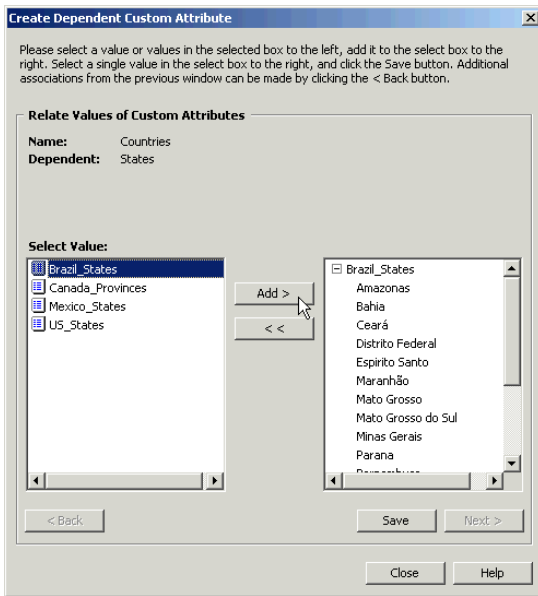
**Notes:**


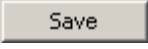
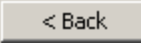
1. Once a dependent custom attribute has been created, new enumeration custom attributes cannot be added to the dependency chain.
2. Once a dependency chain is established between enumeration custom attributes, these attributes cannot be removed.
3. Once an enumeration custom attribute has been used as part of a dependency chain, it is not available for use in other dependent custom attributes.

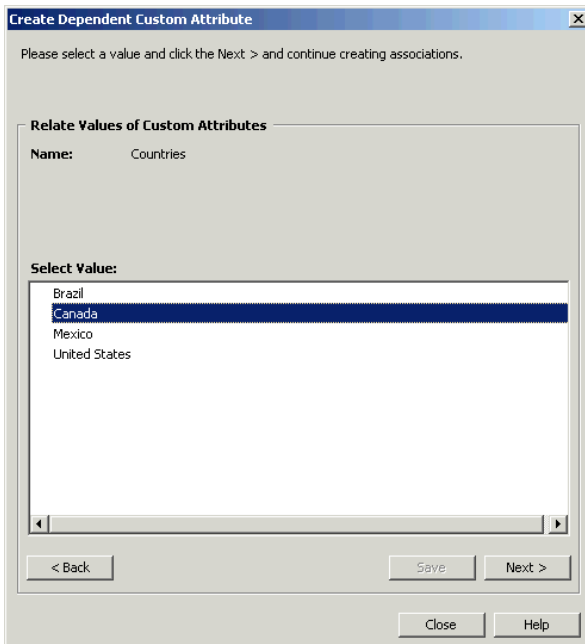
## Citadon Customer Support

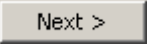
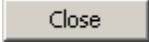
### Citadon CW

**Hours: 6am - 6pm PST**  
<mailto:support@citadon.com>



- Select the desired value list for that relation and click . You can now verify the contents of the list to ensure this is the correct selection.
- When satisfied, click  and then  to associate the next item.



- Select the next item, click  again, and repeat the process with each of the items in the top-level list. Click  when finished.