

Adding Custom Fields

Release 6.2.3 introduces Custom Fields that Administrators can create and populate for various element Editors and select to display on element Viewers.

This article shows how to:

- [Create a Custom Field](#) in the Custom Field Editor
- [Restrict use of Manually Entered values](#)
- [Populate the Custom Fields](#) in element Editors
- [Where in Metric Insights](#) you will see these Custom Fields displayed

1. Create a Custom Field

1.1. Access Admin > Reference Objects > Custom Fields > Fields

The screenshot shows the 'Custom Fields' page in the Metric Insights Admin interface. The top navigation bar includes 'Custom Fields', 'Search', and 'Admin'. The 'Admin' menu is open, showing 'Reference Objects' > 'Custom Fields'. The main content area displays a table of custom fields with columns: Name, Section Name, Scope, and Created By. A black arrow points to the '+ Custom Field' button at the bottom left of the table.

Name	Section Name	Scope	Created By
Comments on how this element is us...	Default	Metrics	Anna
Current data verified by	Default	Metrics, Reports, External Reports, ...	Anna
Current data verified for: (text)	Default	Metrics	Anna
Custom F#1	Default		Anna
Data Governance Officer	Default	Metrics, Multi-Metrics, Reports, Ext...	grayson
Data is not verified yet for	Default	Metrics, Multi-Metrics, Reports, Ext...	Anna
Data Requested by	Default	Metrics, External Reports	Anna
Fruits	Default	Metrics	grayson
Notify for data errors:	Default	Metrics	Anna

Click **[+ Custom Field]** to open Editor

1.2. Set Options in Custom Field Editor

The screenshot shows the 'Custom Field / New Field' editor. At the top, there's a header with 'Custom Field / New Field', a search bar, and navigation links for '+ New', 'Content', 'Admin', and 'Anna'. Below the header, there are tabs for 'Settings', 'Usage', and 'History'. The 'Settings' tab is active. The main form contains several sections:

- 1**: A toggle switch for 'Editable by Power Users' which is currently turned on.
- 2**: A text input field for 'Name' containing 'KPI data'.
- 3**: A text area for 'Description' containing 'Identifies data that is critical to our company KPIs'.
- 4**: A dropdown menu for 'Include in Section' set to 'Default', with '+' and gear icons to its right.
- 5**: Radio buttons for 'Visible to' with 'Everyone' selected and 'Groups' as an option.
- 6**: Radio buttons for 'Field is' with 'Single Value' selected, and 'Multi-Value', 'Text', 'Email Address', 'Date/time', and 'Users' as other options.
- 7**: A 'Show on' section with checkboxes for 'Metrics' (checked), 'Multi-Metrics', 'Reports', 'External Reports', 'External Content', 'Dataset' (checked), and 'User Map' (checked).
- 8**: A 'Visible in' section with checkboxes for 'Search Results' (checked), 'Search Left Filter Pane' (checked), 'Tile Preview', 'Tile Hover Information', 'Request Access Dialog' (checked), and 'Element and/or Dataset Viewer' (checked).
- 9**: A link labeled 'Advanced' to expand more options.
- 10**: A checkbox for 'Set custom alias for mapping (used for synchronization with other systems)' which is checked, and a 'Mapping Alias' input field containing 'PII'.
- 11**: A 'Custom Field Change Log' table at the bottom.

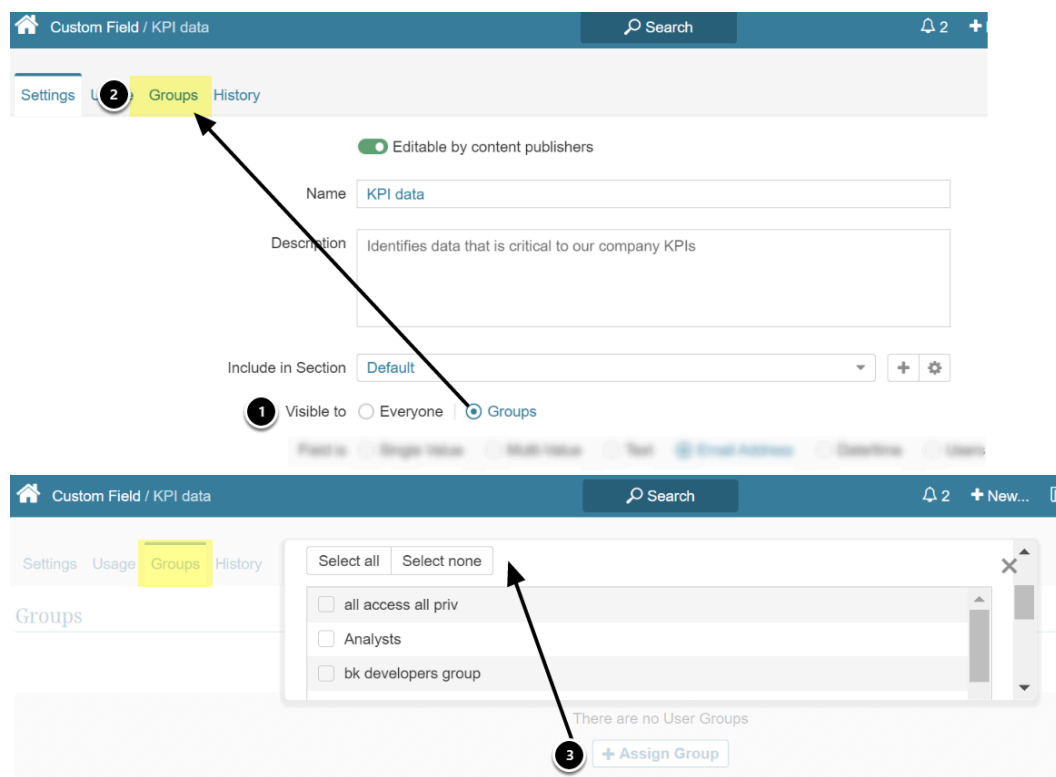
Updated On	Updated By	
2022-06-01 17:02:32	Anna Kennedy	View Changes

- 1. Editable by Power Users:** this field defaults to "On". If **Editable by Power Users** is set to "Off", the field must be set via [AutoSync](#) and cannot be changed in element Editors.
- 2. Name:** Input a unique and meaningful field name
- (optional) **Description.** If **Editable by content publishers** is set to "On", this field will display on Viewers
- 4. Include in Section:** New Custom Fields default to the "Default section", you can change [Section](#) using the dropdown
- 5. Visible to:** Viewing of this Custom Field can be restricted to specific Groups; setting this field to **Groups** will create a new tab - see [Setting Visible to Option to Group](#).
- 6. Field is:** Allows field to be set in various formats. For details, see [Definitions of "Field is" options](#)
- 7. (not shown above) Value Source:** This field is only displayed if "Field is" set to Single Value or Multi-value in the above step. For details, see [Value Source Field Options](#).
- 8. Show on:** Select Editors/Viewers on which this field can be set/displayed
- 9. Visible in:** Select where the Custom Fields are displayed or if they are used in Global Search/Request Access Dialog
- 10. Set custom Alias:** Currently used only by SharePoint plugin. If the SharePoint plugin is not correctly set, the Advanced Section will not display. For details, see [Configure Custom Field Data Synchronization for Microsoft SharePoint](#)
- 11. Change Log:** See [Change Log](#)

[Save]

1.2.1. Option "Visible to" = Group

A new **Group** tab is created when "**Visible to**" option is set to "*Group*" (Step 5 [Set Options in Custom Field Editor](#))



1. Set **Visible to** = *Groups*
2. Automatically a new tab = **Groups** is created
3. **[+ Assign Groups]** to display a multi-select popup of Groups

[+ Add Selected] at bottom of list

1.2.2. Definitions of "Field is" options

1.2.2.1. Field is Single Value or Multi-Value

If either of the above options is chosen for "Field is", an additional option, **Value Source**, is displayed

Include in Section Default + ⚙

Visible to ☒ Everyone | ☐ Groups

Field is ☒ Single Value | ☐ Multi-Value | ☐ Text | ☐ Email Address | ☐ Date/time | ☐ Users

Value Source ☒ Entered Manually | ☐ Dataset

1.2.2.1.1. Value Source = "Entered Manually"

Custom Field / Data requested by: Search 2 +

[Settings](#) [Usage](#) [History](#)

☒ Editable by content publishers

Name

Description

Include in Section Demo CF Section + ⚙

Visible to ☒ Everyone | ☐ Groups

1 Field is ☐ Single Value ☒ Multi-Value | ☐ Text | ☐ Email Address | ☐ Date/time | ☐ Users

2 Value Source ☒ Entered Manually | ☐ Dataset

Values ⬆ ⬆ Drag & Drop Rows to Sort 📋			
<input type="checkbox"/>	Value	Feature Restrictions	Exception Groups
<input type="checkbox"/>	Business Owner		⚙
<input type="checkbox"/>	Customer		⚙
<input type="checkbox"/>	Technical Owner		⚙

3 + Value Selected

1. When **Field is = "Single Value"**, you can define multiple options for the Values, but only one may be selected on an element Editor for display. When **Field is = "Multi-Value"**, publisher will be allowed to choose any number of defined values for display on elements.
2. Set **Value Source = "Entered Manually"**
3. **[+ Value]** to display popup for Value input

[Save] and optionally continue to add more Values **[+ Values]**

1.2.2.1.2. Value Source = "Dataset Field"

Visible to ☒ Everyone | ☐ Groups

Field is ☒ Single Value | ☐ Multi-Value | ☐ Text | ☐ Email Address | ☐ Date/time | ☐ Users

Value Source ☐ Entered Manually | ☒ Dataset

1 Dataset & View

2 Display Column

3 Hyperlink

Show on ☐ Metrics
☐ Multi-Metrics
☒ Reports

Datasets / Fruits / All data

Dataset collects

☒ Select text fields
☒ display_name
☒ link

Define filters

Results

display_name	link
apple	https://www.google.com/search?q=apple&ie=UTF-8&oe=UTF-8
banana	https://www.google.com/search?q=banana&ie=UTF-8&oe=UTF-8
mandarin	https://www.google.com/search?q=mandarin&ie=UTF-8&oe=UTF-8
pineapple	https://www.google.com/search?q=pineapple&ie=UTF-8&oe=UTF-8

1. Select **Dataset View** from dropdown list
2. Select a **Column** from that Dataset View
3. (Optional) If your Dataset contains links, you can select a **Hyperlink** object that will contain a link available when Custom Field is displayed

! You may choose a Dataset of any length, but the number of rows actually displayed will be limited by System Variable, CUSTOM_FIELD_DATASET_MAX_ROWS.

You will receive notification of this limit and the values available for choice on Editors will be limited to max rows.

[V6.3.0] Deletion of chosen Dataset will be restricted as long as this Custom Field has values assigned.

1.2.2.2. Value Source = "Text"

Visible to ☒ Everyone | ☐ Groups

1 Field is ☐ Single Value | ☐ Multi-Value | ☒ Text | ☐ Email Address | ☐ Date/time | ☐ Users

Show on ☒ Metrics
☐ Multi-Metrics
☐ Reports

1. Use the Text Field to display a free-form input field on the element Editors

1.2.2.3. Field is = Email Address

Visible to ☒ Everyone | ☐ Groups

1 Field is ☐ Single Value | ☐ Multi-Value | ☐ Text | ☒ Email Address | ☐ Date/time | ☐ Users

Show on ☒ Metrics
☐ Multi-Metrics
☐ Reports

1. **Email Address:** System will require that field contains a valid email address. On Viewers this field will display as a link. When link is activated, it will open your email system with "mailto:" set to this Value.

1.2.2.4. Field is = Date/time

Visible to ☒ Everyone | ☐ Groups

1 Field is ☐ Single Value | ☐ Multi-Value | ☐ Text | ☐ Email Address | ☒ Date/time | ☐ Users

2 Display Mask --

Show on

-
- 06/16/10
- 06/16/10 20
- 06/16/10 20:22
- 2010
- 2010-08-12
- June 2010
- neoday
- Q4 2010
- Thursday 10/28/2010
- ☐ User Map

Visible in ☒ Search Results

1. **Date/time:** This option will display new field, **Display Mask**
2. **Display Mask:** Select a format from the dropdown that will require the input to conform to selected format

1.2.2.5. Field is = Users

Visible to ☒ Everyone | ☐ Groups

1 Field is ☐ Single Value | ☐ Multi-Value | ☐ Text | ☐ Email Address | ☐ Date/time | ☒ Users

Show on ☒ Metrics

☐ Multi-Metrics

☐ Reports

1. **Users:** System will populate the field will a list of all Metric Insight Users for your system
- Note: Only a **Single** User may be selected for this field

1.2.3. Advance section

Scroll down to Advanced section

Advanced

1

☒ Set custom alias for mapping (used for synchronization with other systems)

2

Mapping Alias

- 1. Checking the **Set custom alias** will open new field, Mapping Alias
- 2. **Mapping Alias:** this is a free-form field that allows you to map this Custom Field to a field in another system. Currently, this mapping to restricted to fields in SharePoint. See [Configure Custom Field Data Synchronization for Microsoft SharePoint](#)

1.2.4. Change Log

Advanced

☒ Set custom alias for mapping (used for synchronization with other systems)

Mapping Alias

Custom Field Change Log

Updated On	Updated By	
2022-01-27 21:10:09	Anna Kennedy	1 View Changes
2022-01-21 20:24:00	Anna Kennedy	View Changes

Custom Field / KPI data

2


Change Details

Field	Old Value	New Value
Set custom alias for mapping	N	Y
Mapping Alias		PII

Close

- 1. **Change Log:** Displays changes to values defined in prior steps
- 2. **Change Details:** Displays a grid of Old and New Values for changed fields

1.3. Set Restrictions for Manually Added Custom Fields

 [new in 6.2.5] For manually entered values only, an Edit gear is added for each row/ value. On click, a popup displays with options to:

- Restrict download, email, and print functions

- Create an exceptions list for these restrictions based on Group & Category

❗ The email restriction does not apply to Bursting, therefore to fully restrict emailing, users must not be granted the Create Bursts privilege

Custom Field / Data Requested by

Settings Change History Elements

Editable by content publishers

Name: Data Requested by (multi-value)

Include in Section: Default

Field is: ☐ Single Value ☒ Multi-Value ☐ Text

Value Source: ☒ Entered Manually ☐ Dataset ☐ Users

Value	Feature Restrictions	Exception Groups
<input type="checkbox"/> Owner	-	0
<input type="checkbox"/> Executive Officer	-	0
<input type="checkbox"/> Customer Request	-	0
<input type="checkbox"/> Data Analyst	-	0
<input type="checkbox"/> Business Owner	-	0

+ Value Selected

Edit Custom Field Value

Value: Executive Officer

☒ Restrict download, email, printing for all objects with **Data Requested by (multi-value)** set to **Executive Officer**

Members of the following groups will be exempt from restrictions

There are no Restrict Exceptions

+ Value

Save or cancel

1. Click on Edit gear to open popup
2. Toggle to set Restrictions - prevents Users from downloading, emailing, and printing for all
3. (optional) If you wish to exempt Groups from this restriction, select [+ Value] to open popup below

1.3.1. [6.3.0] Exempting Groups From Restrictions

Add a Restriction Exception [X]

This exception will **allow users** in this group to download, email and print **restricted content**

1 Group

2 Category

3 **Save** or [cancel](#)

Edit Custom Field Value [X]

Value

☒ Restrict download, email, printing for all objects with **Data Requested by (multi-value)** set to **Executive Officer**

Members of the following groups will be exempt from restrictions

4 Exceptions to restriction [+]

Group	Category	
Sales Management Team	Sales & Marketing	[X]
Sales Management Team	Procurement	[X]

[+ Value](#)

5 **Save** or [cancel](#)

1. Select a **Group** for exemptions from drop-down
2. You can restrict the Group exemption by *All Categories (-)* or select a specific **Category**
3. **[Save]** to return to the *Edit Custom Field Value* screen where you can continue to add exempt Groups/Categories
4. *Edit Custom Field Value*: example of completed Restrictions and Exceptions
5. **[Save]** to return to Editor

Visible in ☒ Search Results
☒ Search Left Filter Pane
☐ Tile Preview
☐ Tile Hover Information
☒ Element and/or Dataset Viewer

Custom Field Change Log	
Updated On	Updated By
2021-06-29 18:33:06	Anna Kennedy

1 [View Changes](#)

Change Details

Custom Field Change Details		
Field	Old Value	New Value
Name	New Field	KPI data
Description		Identifies data that is critical to...
Show on Dataset	N	Y

[Close](#)

1. Select "View Changes" to open popup to view Change Details

1.4. Other Tabs on Custom Field Editor

1.4.1. Usage tab

Custom Field / Data Requested by (multi-value) [Search](#)

[Settings](#) **[Usage](#)** [Change History](#)

Elements that Include this Custom Field				
ID	Name	Type	Category ▲	Assigned Value
1464	Alerts (dimensioned by Country)	Metric	Demo Elements	Executive Officer
2037	Data on Daily Sales	Metric	Finance	Owner
1431	Cost greater than Sales	Report	Sales & Marketing	Customer Request
1299	Daily Active Users	Metric	Usage	Data Analyst

This tab displays all elements where a value has been set for a Custom Field

1.4.2. History tab

i [6.3.0] The History tab was modified and Custom Field value changes were added to all of the Element Editor History Tabs.

Custom Field / Data verified by				
Search				
1324 + New... Content				
Settings Usage History +				
1 Object Value Changes				
Element Name	Changes	Updated By	Updated On	
Daily Active Users	2 Technical Owner	Anna Kennedy	2021-07-23 18:25:10	
Daily Active Users	3 Data Analyst → Technical Owner	Anna Kennedy	2021-07-23 18:11:00	
Sales by Country	Business Unit → Data Analyst	Anna Kennedy	2021-07-23 18:06:49	
Sales by Country	Business Unit	Anna Kennedy	2021-07-23 18:06:08	
Alerts	Technical Owner	Anna Kennedy	2021-07-22 20:39:05	
Daily Active Users	4 Data Analyst	Anna Kennedy	2021-06-28 16:18:39	

1. "Object Value Changes" are sorted by date updated and displayed by **Element Name**,
2. **Removed** values are shown with a strikethrough (no new value assigned)
3. **Changed** values show both old values with strikethrough and new value
4. When Value is **added to a blank field**, only the new value is displayed

2. Setting CF Values on Element Editors - Info tab

Custom Fields are found on the **Info** tab where their Values can be selected (or entered in the case of text fields). Fields left blank will not display nor will they be available in Global Search.

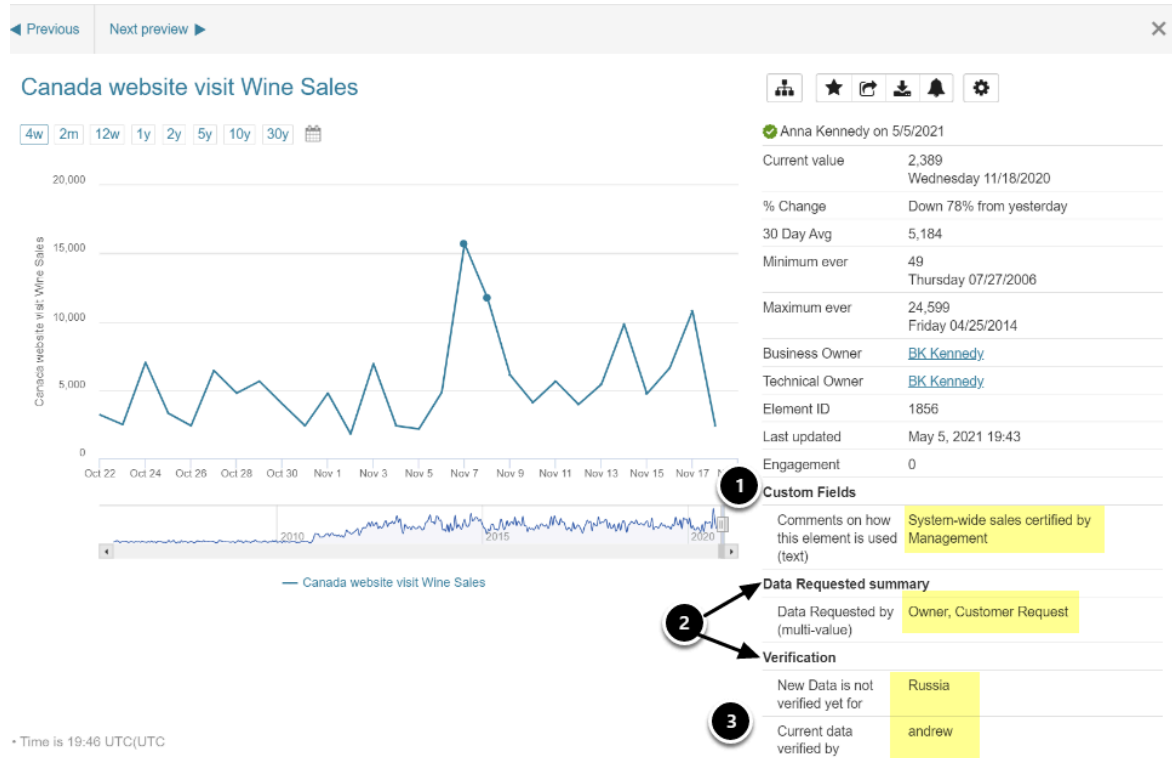
Custom Fields

- 1 Data verified by
- 2 Comments on how this element is used (text)
2500 character maximum
- 3 Data Requested by (multi-value)
- 4 Current data verified by
- 5 New Data is not verified yet for

1. Blank fields will not display on Viewers
2. Text field - free form input
3. Multi-value field is set Manually
4. Source is User field (only single value allowed)
5. Single value field set via Dataset

3. Custom Fields Display Examples

3.1. Visible in Tile Previews



1. Default Section ("Custom Fields" is the default Section)
2. User added Sections
3. Custom field that is set with values (andrew)

3.2. Dataset Views (info icon)

The screenshot displays the 'All data' view for 'Daily Web Analytics'. The interface includes a top navigation bar with a search bar and a sidebar with 'Select Fields' and 'Track Changes' tabs. The 'Select Fields' tab is active, showing a list of fields to select. The 'Track Changes' tab is also visible. The 'Define filters' section is empty. The 'Results' section shows a table with 7 columns: visitorType, medium, browser, isMobile, city, visits, and pageviews. The table contains 2 rows of data. A dropdown menu is open, showing 'Daily Web Analytics' and 'Custom Fields' with 'KPI data: critical'.

Select Fields

- ☒ Select text fields
- ☒ visitorType
- ☒ medium
- ☒ browser
- ☒ isMobile
- ☒ city
- ☒ Select numeric & date fields
- ☒ visits
- ☒ pageviews
-

Define filters

AND OR

Results

visitorType	medium	browser	isMobile	city	visits	pageviews
New Visitor	(none)	Chrome	No	Gurgaon	1	1
New Visitor	(none)	Chrome	No	Navi Mumbai	1	1

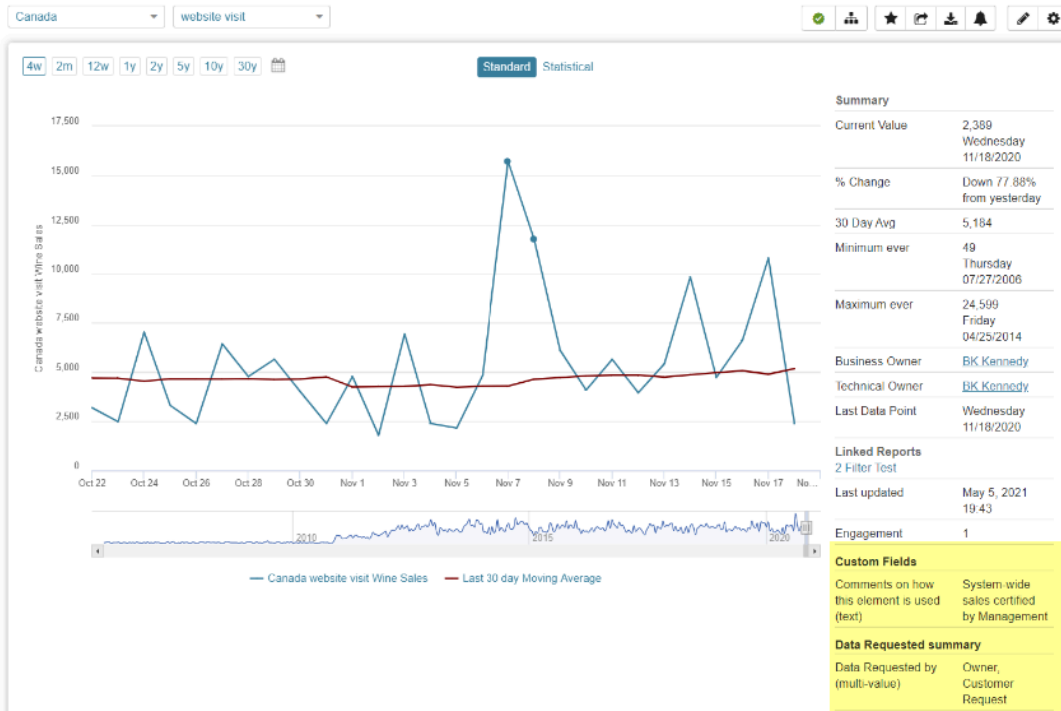
Custom Fields
KPI data: critical

1. [new in 6.3.0] In Dataset and User Map Viewers, the Custom Fields are displayed when the Info Icon is activated

3.3. Element Viewers - (Summary)

Canada website visit Wine Sales

Total Sales by date, country, and channel



3.4. Global Search

Owner

0 New... Content Admin

All Tiles (2) Datasets (7)

Owner

Tag

Category

Data Requested summary

Data Requested by (multi-val)

Certified only

Search data column names

Include all terms

Any Engagement count

Created at any time

Learn about Search

Search for "Owner" in your data via Bing, Google

Data on Daily Sales

Data on Daily Sales Metric

Tags sales

Category: Finance

* Data Requested summary

Data Requested by (multi-value): Owner

Business Owner: Anna Kennedy

Technical Owner: Anna Kennedy

Engagement: 6 | Created: 8/11/2020

Metric | ID: 2037

\$10.5M on Wednesday 11/18/2020

Daily Active Users

Daily Active Users Metric

Category: Administration / Usage

* Data Requested summary

Data Requested by (multi-value): Data Analyst

Business Owner: Grayson Stebbins

Technical Owner: Grayson Stebbins

Engagement: 7 | Created: 9/19/2018

Metric | ID: 1299

1,153 on Wednesday 05/05/2021

What's next?

If you'd like to set these Custom Fields to be automatically updated, see [Custom Field Auto Synchronization](#)