

Forms & Attributes – EAs - Best Practices

Overview:


This document will explain some best practices regarding Extended Attributes (EAs). Some of those include naming strategies, how to add EAs to Business Intelligence (BI) Reporting, and settings that adjust the functionality of EAs.

Naming:


Naming an EA correctly can potentially save hours of difficulties in the future. A well-named EA will explain to a user:

- Exactly what the EA is
- What the EA is used for
- Where it should appropriately be used

Here are some examples of badly-named EAs...

	Name
	ProjectEnd

Is this a date field? Boolean? Also, this information can likely be found by looking at a project's status.

	Name
	SiteTimeVAR

Hmmm, "VAR" = variable? This EA appears to have something to do with Sites, but not much more can be inferred. If this is meant to indicate time zone, a better name might be "SiteTimeZoneCodeVAR".

	Name
	VFXTYPEB67T9

This might mean something to the admin that created the EA, but not much to anyone else.

	Name
	678SITEADDRESSANDLEASEOWNERLASTNAMEFIRSTNAME

This name is... too descriptive. Some specific issues:

- The numeric code at the front. This will likely cause issues for users searching for this EA. It is always best to keep the broadest piece of information at the front (in this case, 'Site').
- ALL CAPS. This makes the EA visually muddy and more difficult to read. EA names are much easier to decipher if capital letters are used only for the beginning of each word and acronyms, where appropriate.
- There is too much information packed into this name. "SiteAddressLeaseOwner" is much shorter, and still gives an appropriate level of information. If specific formatting instructions need to be conveyed, a better approach is to add a text field on the form next to the EA with those instructions.

In conclusion, EA names work best when they follow a naming system that is uniform and easy to understand.

How To Ensure EAs are Added to BI Reporting:

Adding an EA to BI Reporting is very easy. To do so, make sure that the "Reportable?" box is checked for that attribute, as shown below:

The screenshot shows a configuration form for an EA attribute. The fields are as follows:

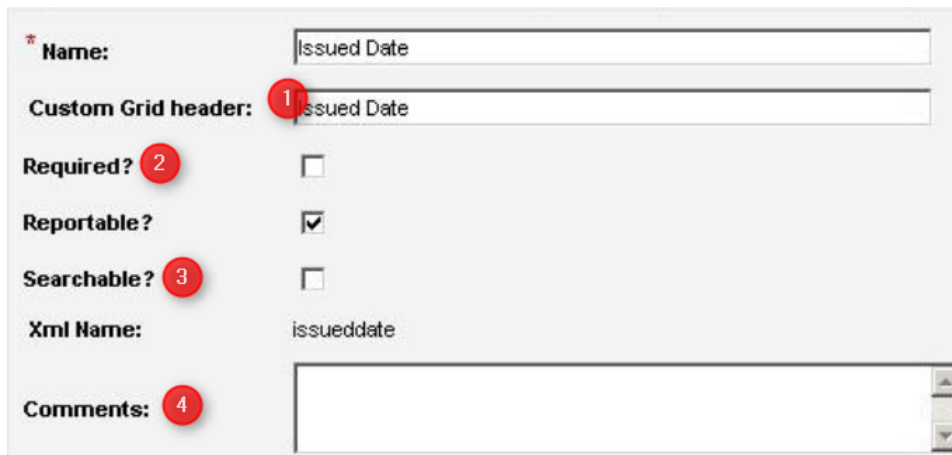
- Name:** Issued Date
- Custom Grid header:** Issued Date
- Required?:** ☐
- Reportable?:** ☒ (This checkbox is highlighted with a red rectangle)
- Searchable?:** ☐
- Xml Name:** issueddate
- Comments:** (Empty text area)

Ideally this box should be checked at the same time the EA is created. This can also be done after an EA has been created, but be careful. If an EA has previously been flagged as Reportable, then removed from Reporting, and is later re-enabled as Reportable, the system will assume that this action was performed in error and ignore it. In this case, make sure the EA is properly flagged and contact Support at 877.345.3999 ext.3. Support will make sure that the attribute is properly added into Reporting.

Lastly, in order to be added into Business Intelligence, an EA must have at least one piece of data associated with it. In order to maintain the highest possible level of performance, EAs without any associated data are not added to BI.

EA Settings:

There are several settings associated with each EA, which can be set either when creating a new EA or editing an existing one. Besides 'Reportable', here are some others:



The screenshot shows a form for configuring an EA. The fields and their values are as follows:

- Name:** Issued Date
- Custom Grid header:** Issued Date (highlighted with a red circle 1)
- Required?:** ☐ (highlighted with a red circle 2)
- Reportable?:** ☒
- Searchable?:** ☐ (highlighted with a red circle 3)
- Xml Name:** issueddate
- Comments:** (empty text area, highlighted with a red circle 4)

1. Custom Grid header – This is the heading that will appear above the EA in any Siterra grid view. This will default to the EA name, which is frequently a good descriptor, but sometimes more information is required.
2. Required? – This determines whether an EA must be filled out for an object. Be very careful when using this function, as it can frequently cause confusion with users attempting to edit and object with a new required EA.
3. Searchable? – This determines whether values associated with the EA can be used when searching for an associated object.
4. Comments – It is highly recommended that this field be utilized to give context to the EA. This is an excellent place to explain why this EA exists and what it should be used for.