Add Custom Library Fields

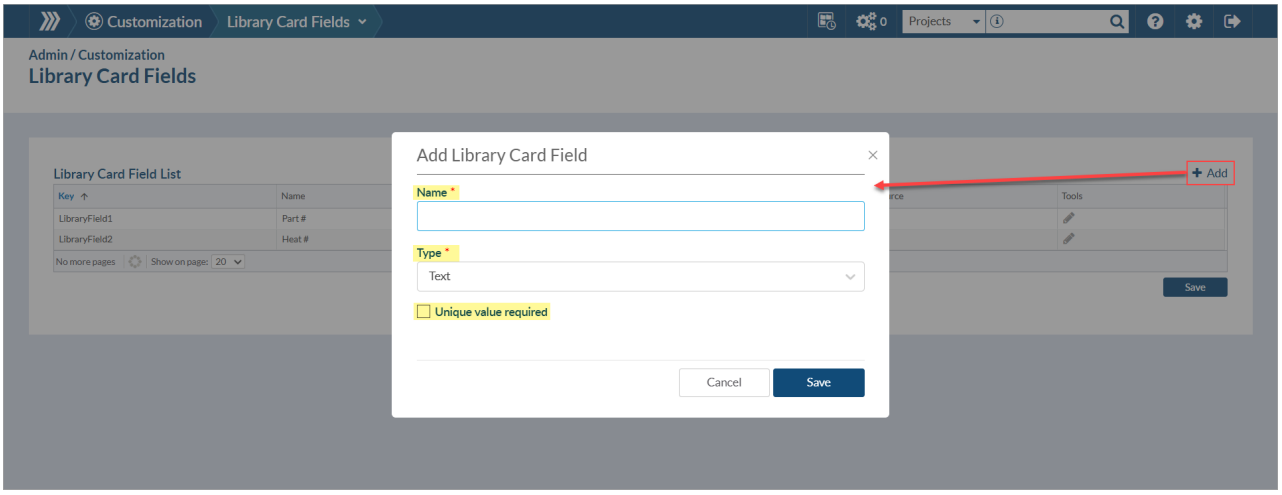
09/28/2026 9:41 am MDT

To keep track of additional information on library documents, custom library fields can be added.

Add custom library field

To add a new library card field, navigate to **System Menu > Admin > Customization > Library Card Fields**.

To add a new field, click the "+ Add" button above the grid. From the pop-up, give the field a name, choose a field type (date, list, text, or number), and select whether a unique value is required. Once filled in, click "Save" and the field will become available for use in the library.

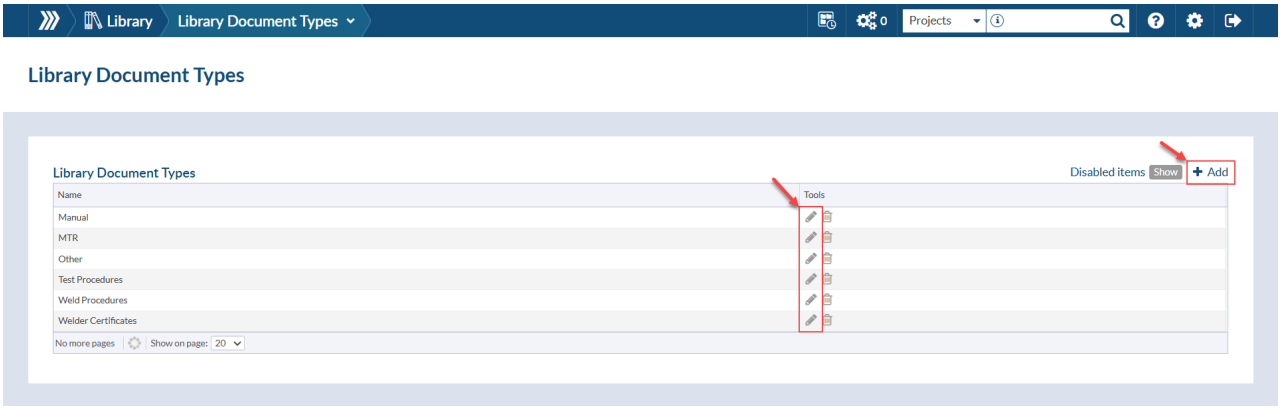


Updates can also be made to pre-existing library card fields by clicking the pencil under "Tools." The field type cannot be changed, but the name and unique value requirement can be updated as needed.

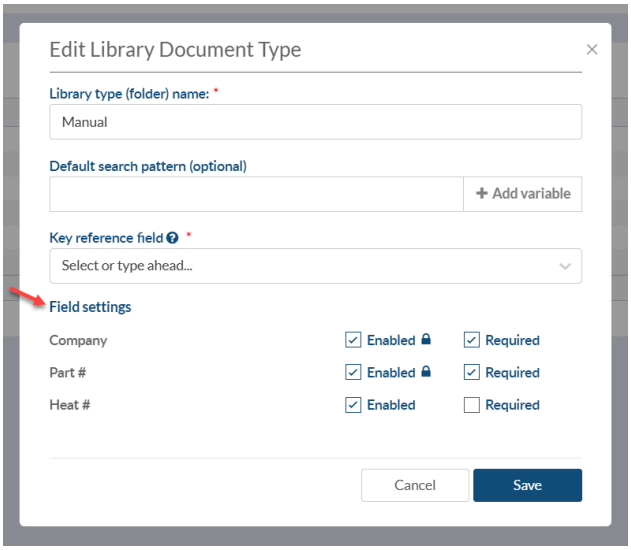
Note for **Unique value required**, the value must be unique across all document types. (For example, the field "Heat Number", if set to Yes for unique value required, would NOT be allowed as the same value for one PMI document type and one MTR document type.)

Customize fields per document type

To add/edit custom library card fields to library document types, navigate to **System Menu > Library > Library Document Types**. In the grid, click the pencil icon under "Tools" to update pre-existing document types, and click the "+ Add" button above the grid if a new document type is needed.



A popup will appear where the custom library fields can be enabled for use. The key reference field (*must be set as a "Required" field*) can also be selected, along with an optional search pattern (to help facilitate auto-matching library files to cards - see article).



If a lock icon appears next to the "Enabled" checkbox, this indicates that there are cards with data in this field. Disabling the field and saving will result in the data being cleared from the card.

