

Add Custom Library Fields

09/16/2024 2:21 pm MDT

By default, the **library** includes the following fields:

- Sub-supplier*
- Sub-supplier doc name*
- Sub-supplier doc ref number
- Supplier doc name*
- Affiliate*
- Review period
- Folder* (user-defined list)
- Web address (source)
- Keywords (for query)

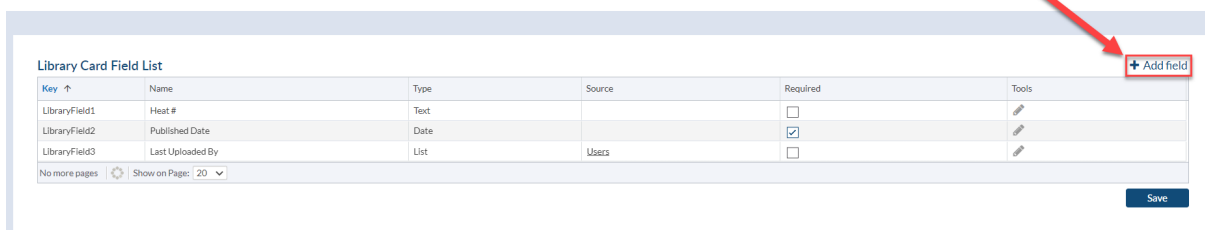
Note: Fields marked with an asterisk () are required.*

Any additional information users would like to track can be added as custom fields.

Add custom library fields

1. From the **System menu**, select **Customization > Library card fields**.
2. Select **Add field** to create a new custom field, or select the **Edit** icon from the **Tools** column to make changes to an existing custom field.

Admin / Customization
Library Card Fields



3. Fill out the Name and Type (text, date, or list), and select whether a unique value is required.

Add Library Card Field

Name *

Type *

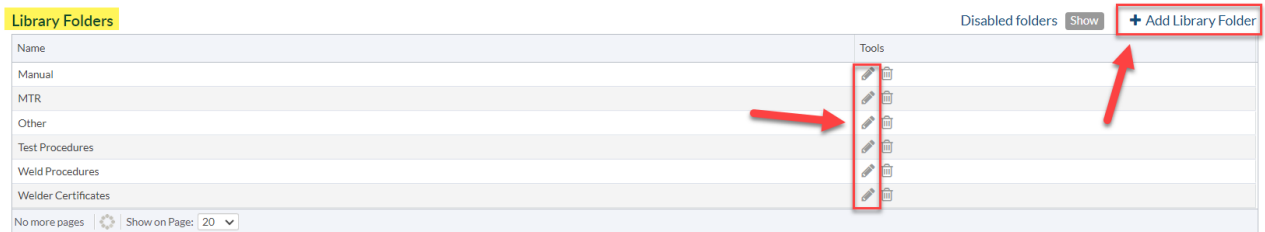
Unique value required

Cancel Save

4. Click **Save**. The field(s) will then be available to use in the DocBoss library.

Customize fields per folder

From the system menu, select **Library > Library Folders**. On the grid, edit an existing folder or create a new folder.



A popup will appear with the folder name and field settings.

Custom fields can be enabled/disabled and set as required/optional by selecting the applicable checkboxes on the popup:

Edit Library Folder

Name: *

Field settings

Heat #	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Published Date	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Last Uploaded By	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
PO #	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Lot #	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Country of Origin	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required
Part #	<input checked="" type="checkbox"/> Enabled	<input type="checkbox"/> Required