

# Project Templates

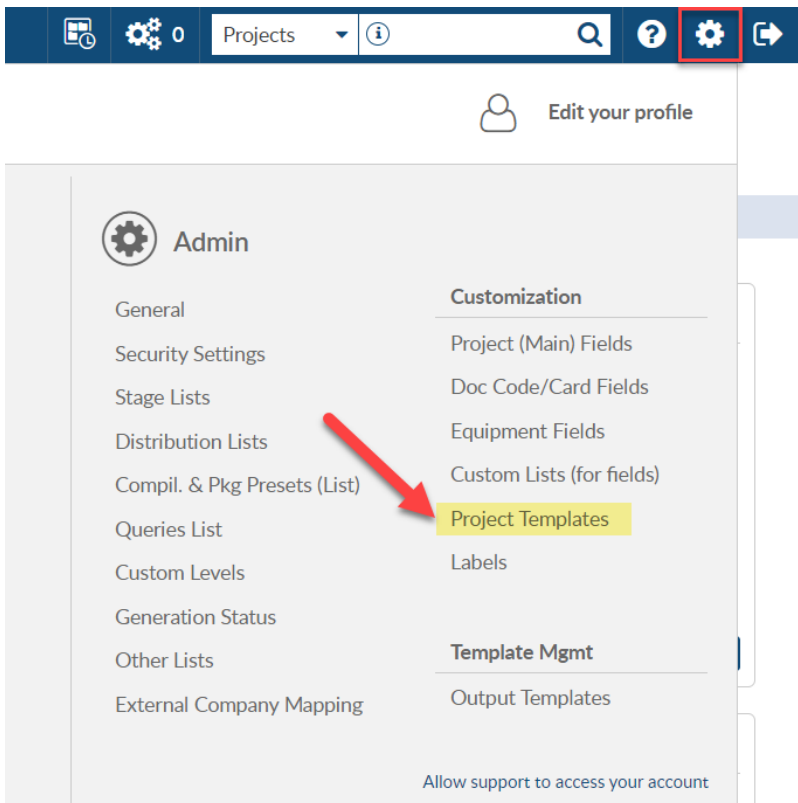
09/16/2024 1:33 pm MDT

What is a Project Field Template?

A Project Field Template allows you to define some default settings for your project

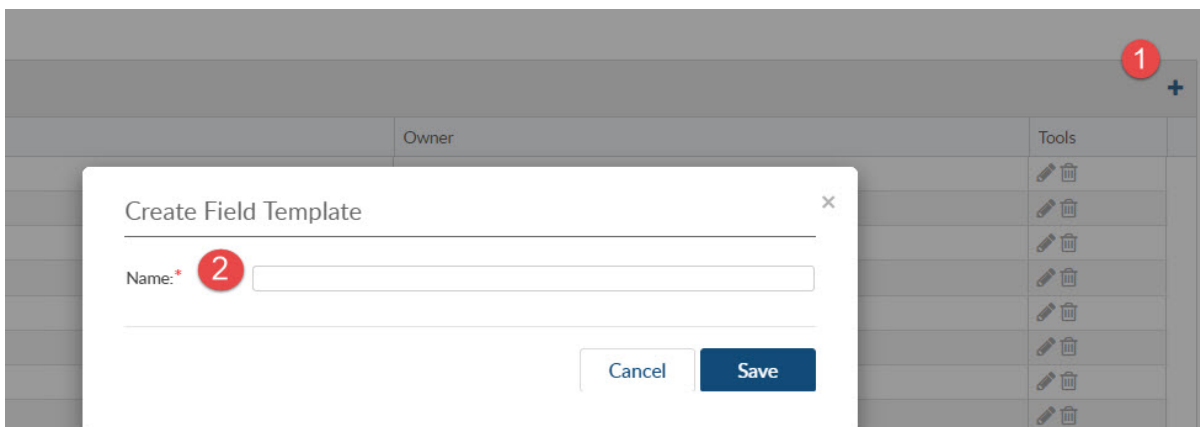
## Create a New Project Field Template

Navigate – Admin > (Customization) Project Templates

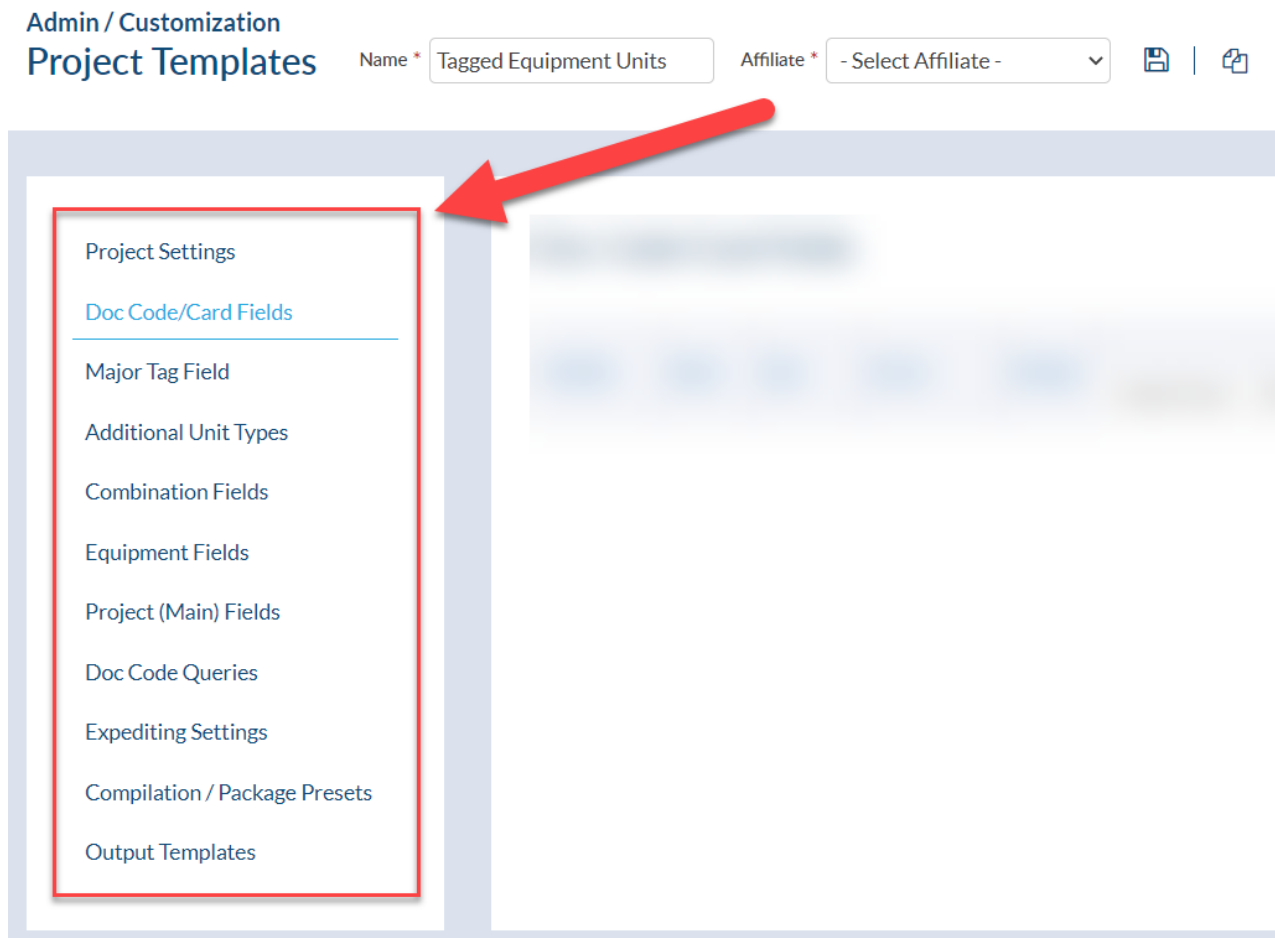


Step 1 Click “+” to add

Step 2 Name your Template (make it something relevant so it is easy to select/distinguish for future projects)



You will be redirected to the Project Settings screen. From the navigation bar on the left, choose each heading to view the options belonging to that category.



#### Project Settings

- Default Settings that can be applied to your project set up. Even after the template is selected and the default settings are applied they can easily be changed for each individual project.

#### Doc Code/Card Fields

- To add custom columns to your Code List/Card List. Giving you the ability to manage more data specific to the project. There can be an unlimited amount of custom Doc Code/Card Fields set up in your system. On each template, you have the ability to enable them or not.
- [Click here for more about Doc Code/Card Fields](#)

#### Major Tag Field

- If you are using our Major Tag module, you add your fields here.
- [Click here for more about Major Tags](#)

#### Additional Unit Types

- Manage additional unit types (such as Steel)

#### Combination Fields

- Manage combination fields

#### Equipment Fields

- To add custom columns to your Equipment List. There are six (6) custom columns available, you change the name (this will be the name of your column header) and then enable it on the project.

- [Click here for more about Equipment Fields](#)

#### Project (Main) Fields

- Manage custom Project (Main) fields

#### Doc Code Queries

- You can set up some specific Doc Code Queries, once a level has been set and cards have been created. The Queries is a systematic calculation that is applied to define which cards are applicable. The default query is "All Required" = All Docs are Required.

#### Expediting Settings

- Toggle expediting ON/OFF on project
- Select targets for expediting

#### Compilation / Package Presets

- Select default preset for compilations and default preset for packages

#### Output Templates

- Select default output templates (cover pages, transmittals, SDI, email, etc.)
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