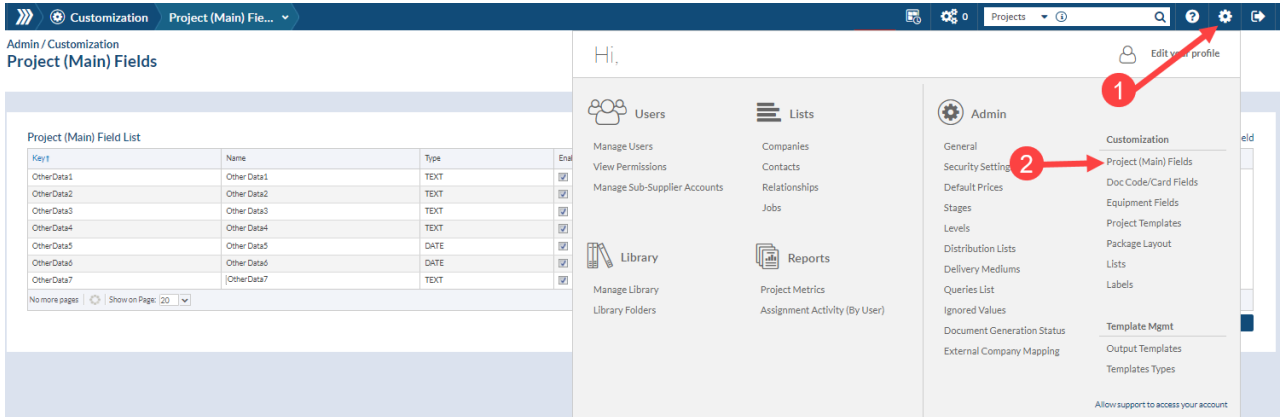


Other Data - Project (Main) Fields

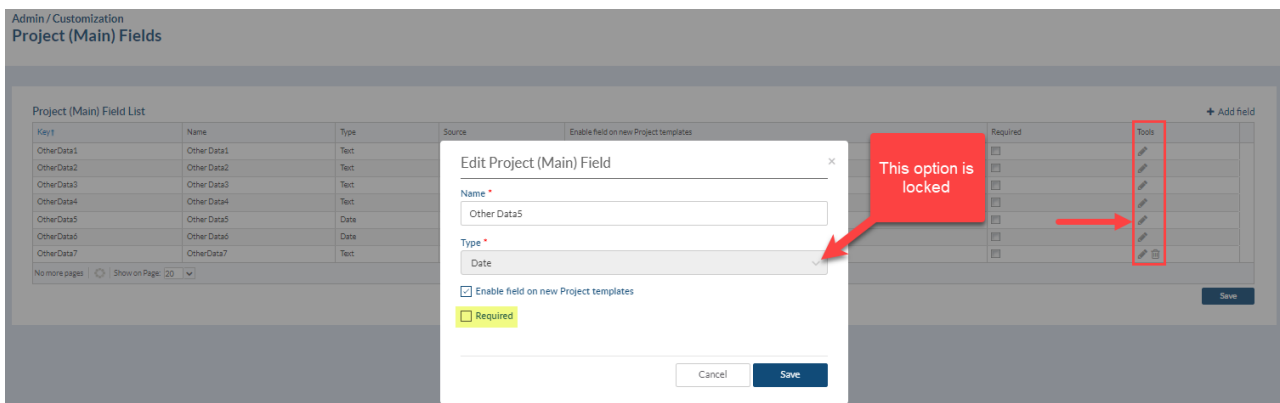
09/16/2024 1:32 pm MDT

Users may now add an unlimited number of custom fields to the main area of projects. Create new date, text, or list fields. There is also an option to define whether fields are mandatory. Users may apply them to any or all project templates.

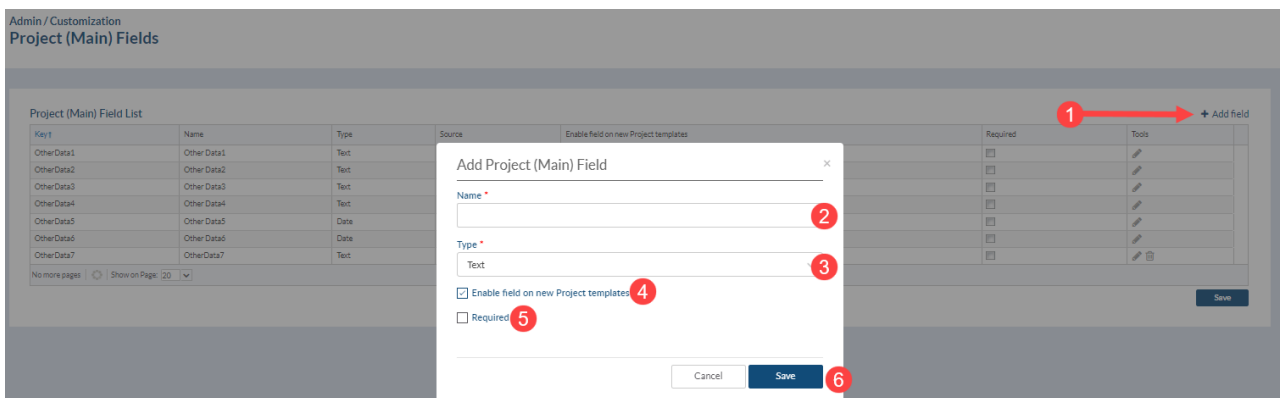
Other Data Fields are managed via Project (Main) Fields page.



Here you can see any existing fields. Note: if the fields have been used on any existing or previous projects you will not see a delete option. You will also not be able to edit the Type from date to text, or vice versa. You can edit to make this field "required".



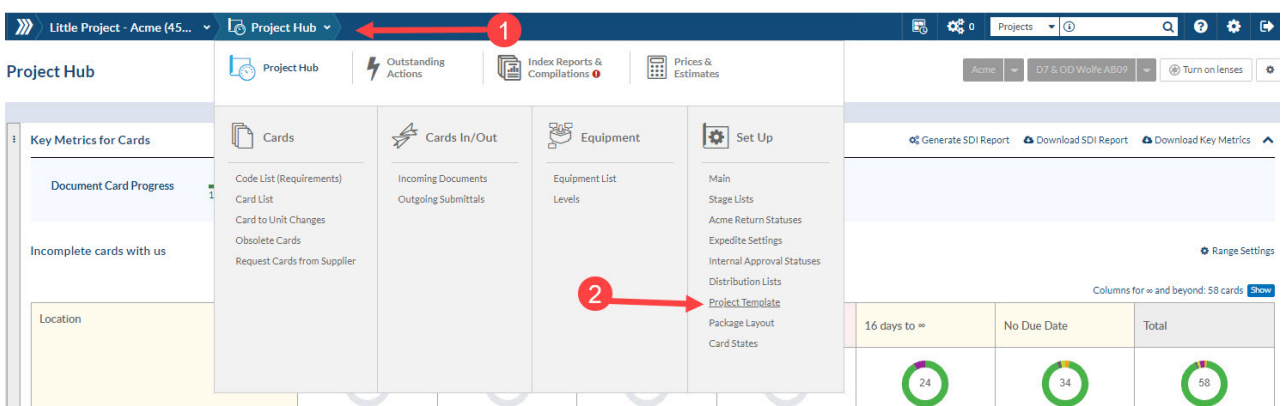
To Add a new Field:



- 1) Click "Add Field"
- 2) Name the field
- 3) Choose if you want a Text, Date or List field (for information on creating a List, see our article [here.](#))
- 4) Click to Enable field on **new** Project templates
- 5) Click to make this field Required
- 6) Save

To enable new Fields on existing projects

Navigate to the Project Template within the desired project.



Scroll to the bottom of the page to see Project (Main) Fields grid.

Click the arrows to enable the other data fields on the project.

#	Field	Type	Required	Enabled	Required	Enabled	Required	Enabled	Required	Enabled		
1	Discipline	Text	CustField1	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enabled	⇄
2	DOC or DWG	Text	CustField2	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enabled	⇄
3	Customer Rev	Text	CustField3	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled	⇄
4	Vendor's VP Number	Text	CustField4	Q	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled	⇄
5	VDR Code	Text	CustField5	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled	⇄
6	VP Size	Text	CustField6	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled	⇄
7	NMR	Text	CustField7	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled	⇄

Project (Main) Fields				
#	Field	Display Name	Type	Status
1	OtherData1	Other Data1	TEXT	Enabled
2	OtherData2	Other Data2	TEXT	Enabled
3	OtherData3	Other Data3	TEXT	Enabled
4	OtherData4	Other Data4	TEXT	Enabled
5	OtherData5	Other Data5	DATE	Enabled
6	OtherData6	Other Data6	DATE	Enabled
7	OtherData7	Other Data7	TEXT	Disabled

Filtering "Other Data" on Multi-Project Card Report

Multi-project card report

Project: Job: Sub-Supplier: Level: Clear Search

Doc Code: Stage: Customer Status: State:

Internal Code: Location: Routing: Approval Status:

Due to Customer: Days since last request:

Expected Return to Demo:

Grid Rows Colors Doc No. Value

Other Data 1 Y	Last In Submittal	Demo Doc Control User Y	Select	Project	Card Name/Autol	Document	Reference	Level	Doc Code	Stage	Sta
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	G130_NGI-MEREG-070000		NGI-MEREG-070000	Order	G130 LOOP DRAWINGS	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	Z1.Supplier1_NGI-MEREG-070000		NGI-MEREG-070000	Order	Z1.Supplier1 Supplier 1 MR Compilation	ISS	XG
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	E134_BDX-307T-D		RGX-307T-D	Vendor Part Number	E134 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	G133_NGI-MEREG-070000		NGI-MEREG-070000	Order	G133 INSTRUMENTATION AND ELECTRICAL ARRANGEMENT DRA...	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	Z1.Supplier2_NGI-MEREG-070000		NGI-MEREG-070000	Order	Z1.Supplier2 Supplier 2 MR Compilation	ISS	XG
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	E134_BDX-407T-D		RGX-407T-D	Vendor Part Number	E134 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	M128_NGI-MEREG-070000		NGI-MEREG-070000	Order	M128 ELECTRICAL WIRING DIAGRAM	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	Z1.Supplier3_NGI-MEREG-070000		NGI-MEREG-070000	Order	Z1.Supplier3 Supplier 3 MR Compilation	ISS	XG
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	E147_EEIS		EEIS	Sub-Supplier	E147 Vendor ISO Quality Manual	IFA	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	A131_NGI-MEREG-070000		NGI-MEREG-070000	Order	A131 INSTALLATION OPERATION AND MAINTENANCE MANUAL	IFI	NU
Mechanical/HVAC	Completion	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters (NGI-MEREG-070000)	P121_NGI-MEREG-070000		NGI-MEREG-070000	Order	P121 FUNCTIONAL AND PERFORMANCE TEST PROCEDURES	IFA	NU

First thing is to bring the Other Data column into the grid. Details on filtering the multi-project card report can be found [here](#).