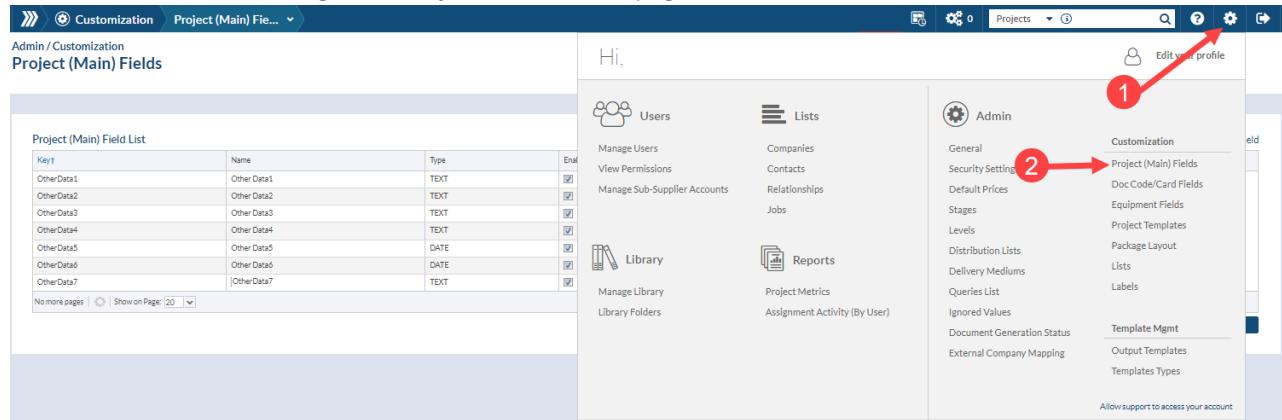


# Other Data - Project (Main) Fields

12/26/2025 3:36 pm MST

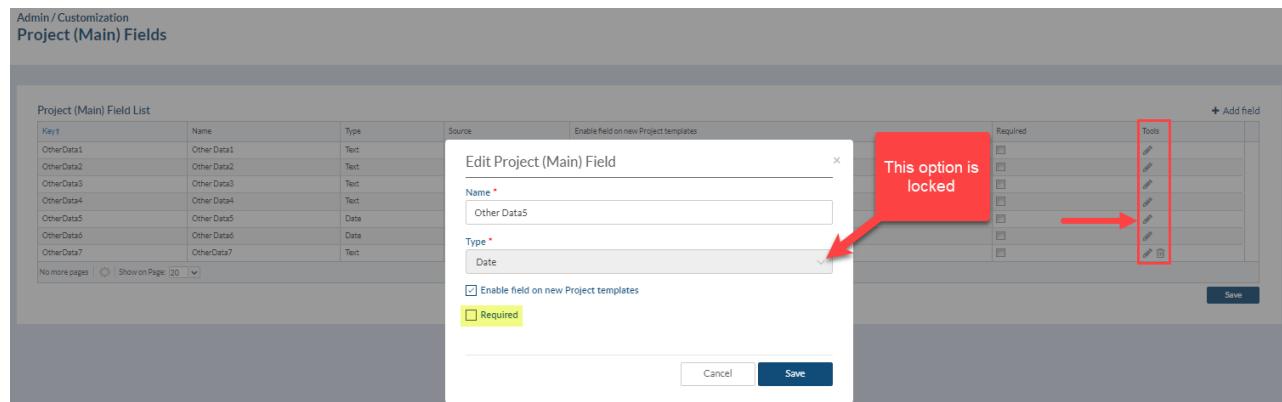
Users may now add an unlimited number of custom fields to the **main** area of projects. Create new date, text, or list fields. There is also an option to define whether fields are mandatory. Users may apply them to any or all project templates.

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



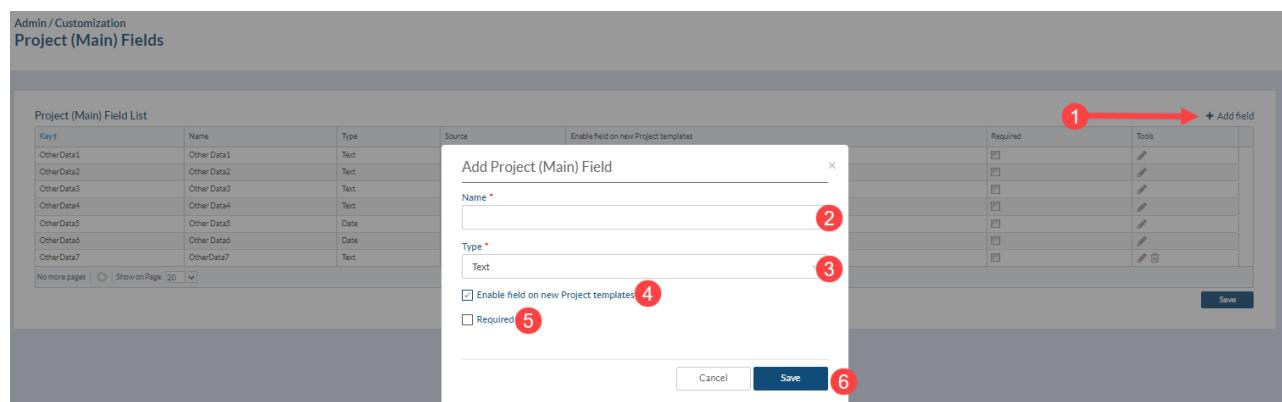
The screenshot shows the Project (Main) Fields page. At the top, there is a navigation bar with links for 'Customization' and 'Project (Main) Fie...'. The main content area is titled 'Project (Main) Fields' and contains a table of existing fields. The right side features a navigation menu with sections like 'Users', 'Lists', 'Admin', and 'Library'. A red arrow labeled '1' points to the 'Edit your profile' link in the top right. Another red arrow labeled '2' points to the 'Project (Main) Fields' link in the 'Customization' section of the menu.

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".



The screenshot shows the 'Edit Project (Main) Field' dialog. It includes fields for 'Name' (set to 'Other Data5') and 'Type' (set to 'Date'). A red callout box with the text 'This option is locked' points to the 'Type' field. Below the dialog are buttons for 'Cancel' and 'Save'.

## To Add a new Field:



The screenshot shows the 'Add Project (Main) Field' dialog. It includes fields for 'Name' (set to 'Text') and 'Type' (set to 'Text'). A red callout box with the text 'This option is locked' points to the 'Type' field. Below the dialog are buttons for 'Cancel' and 'Save'. The dialog is numbered 1 through 6: 1 points to the 'Add field' button, 2 points to the 'Name' field, 3 points to the 'Type' field, 4 points to the 'Enable field on new Project templates' checkbox, 5 points to the 'Required' checkbox, and 6 points to the 'Save' button.

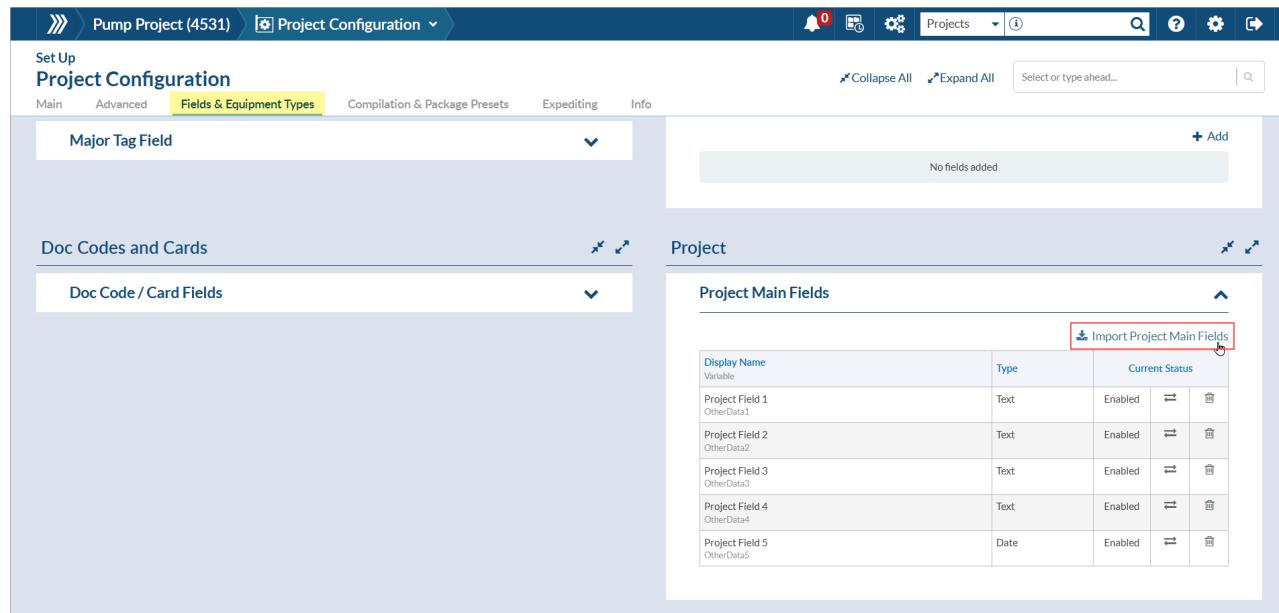
- 1) Click "Add Field"
- 2) Name the field
- 3) Choose if you want a Text, Date or List field (for information on creating a List, see our article [here](#).)
- 4) Click to Enable field on **new** Project templates
- 5) Click to make this field Required
- 6) Save

## To enable new Fields on existing projects

Once a custom project (main) field has been created, you must import it into the project from the **Project Configuration** page. To do this, navigate to **Project Menu > Set Up > Project Configuration**. Open the "Fields & Equipment Types" tab and expand the "Project Main Fields" section. Click the "Import Project Main Fields" option, choose the field(s) to import, and click "Add." Once imported, the field(s) will automatically be enabled.

If a field should be disabled, select the arrow button to change the field from "Enabled" to "Disabled." If the field should be removed from the project entirely, click the delete button.

*\*Note: Removing the field from the project will not delete it from admin.*



The screenshot shows the Project Configuration page with the 'Fields & Equipment Types' tab selected. The 'Project Main Fields' section is expanded, showing a table of imported fields. The 'Import Project Main Fields' button is highlighted with a red box.

Display Name Variable	Type	Current Status
Project Field 1 OtherData1	Text	Enabled
Project Field 2 OtherData2	Text	Enabled
Project Field 3 OtherData3	Text	Enabled
Project Field 4 OtherData4	Text	Enabled
Project Field 5 OtherData5	Date	Enabled

Click the arrows to enable the fields on the project.

## Filtering "Other Data" on Multi-Project Card Report

## Multi-project card report

Project:  Job:  Sub-Supplier:  Level:   The ONV Sub-Supplier

Doc Code:  Stage:  Customer Status:  State:

Internal Code:  Location:  Routing:  Approval Status:

Due to Customer:  Expected Return to Demo:  Days since last request:

Grid Rows Colors  Doc No. Values

**Card List**

Other Data 1	Last In Submittal	Demo Doc Control User	Selected	Project	Card Name(Auto)	Document	Reference	Level	Doc Code	Stage	State
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	G130_NGI-MEREO-070003		NGI-MEREO-070003	Order	G130 LOOP DRAWINGS	IF	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Headers (NGI-MEREO-070003)	Z1_Supplier1_NGI-MEREO-070003	<input type="button" value="View"/>	NGI-MEREO-070003	Order	Z1_Supplier1_Supplier 1 MR Compilation	IS	X
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	E136_RXD-3077-D		RGX-3077-D	Vendor Part Number	E136 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IF	NU
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	G133_NGI-MEREO-070003		NGI-MEREO-070003	Order	G133 INSTRUMENTATION AND ELECTRICAL ARRANGEMENT DRA...	IF	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Headers (NGI-MEREO-070003)	Z1_Supplier2_NGI-MEREO-070003	<input type="button" value="View"/>	NGI-MEREO-070003	Order	Z1_Supplier2_Supplier 2 MR Compilation	IS	X
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	E136_RXD-4077-D		RGX-4077-D	Vendor Part Number	E136 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IF	NU
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	M128_NGI-MEREO-070003		NGI-MEREO-070003	Order	M128 ELECTRICAL WIRING DIAGRAM	IF	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Headers (NGI-MEREO-070003)	Z1_Supplier3_NGI-MEREO-070003	<input type="button" value="View"/>	NGI-MEREO-070003	Order	Z1_Supplier3_Supplier 3 MR Compilation	IS	X
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	E147_EEIS		EEIS	Sub-Supplier	E147 Vendor ISO Quality Manual	IF	NU
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	A131_NGI-MEREO-070003		NGI-MEREO-070003	Order	A131 INSTALLATION OPERATION AND MAINTENANCE MANUAL	IF	NU
Mechanical/HVAC	Kirstie Reid	<input type="checkbox"/>		TBB HVAC Unit Headers (NGI-MEREO-070003)	P121_NGI-MEREO-070003		NGI-MEREO-070003	Order	P121 FUNCTIONAL AND PERFORMANCE TEST PROCEDURES	IF	NU

Sort expected date  Generate Request  Bulk Doc Download

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