

Add Custom Equipment Fields

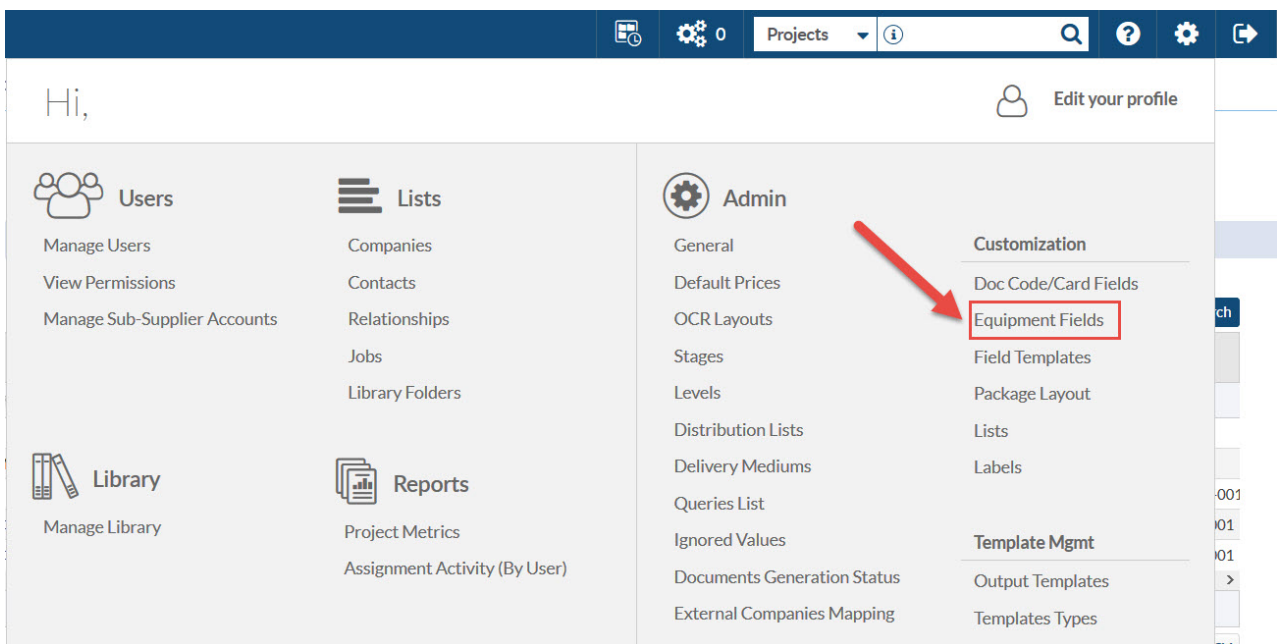
09/16/2024 1:53 pm MDT

You may now add an unlimited number of global and project specific equipment fields.

Global Equipment Fields

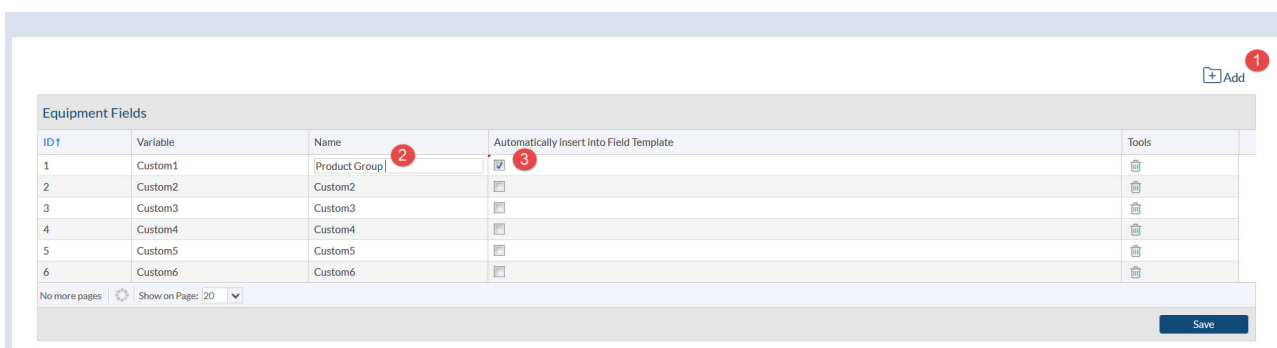
When you set up global equipment fields they can be used in all your projects. The variables will remain constant, so you can create standardized templates which rely on these values.

To manage global fields: Navigate to Settings (Gear) > Customization > Equipment fields.



Here you can:

Admin / Customization
Equipment Fields



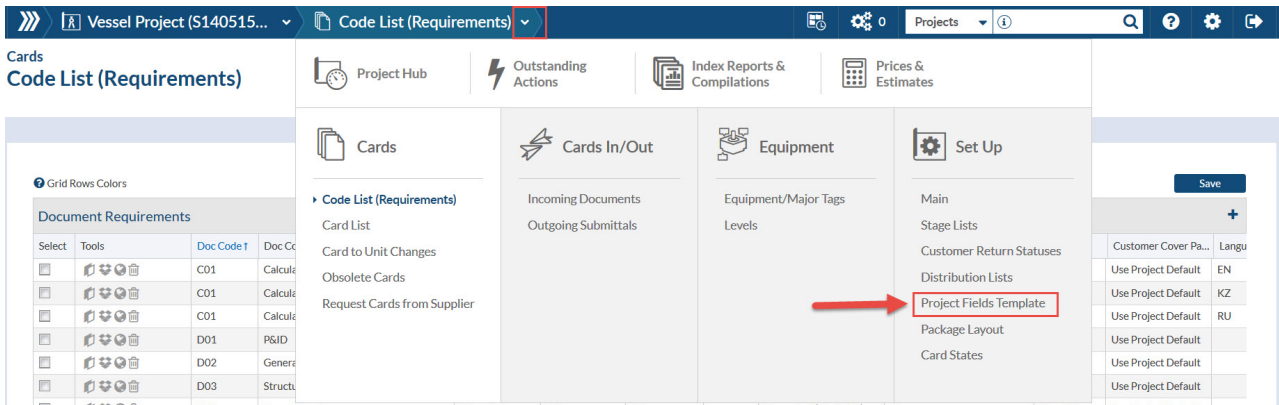
1 – Add as many custom columns as you need by clicking the Add button

2 - Change the name of the existent custom fields (i.e. Product Group in Custom1)

3 - Select to automatically add any custom field to all new project field templates

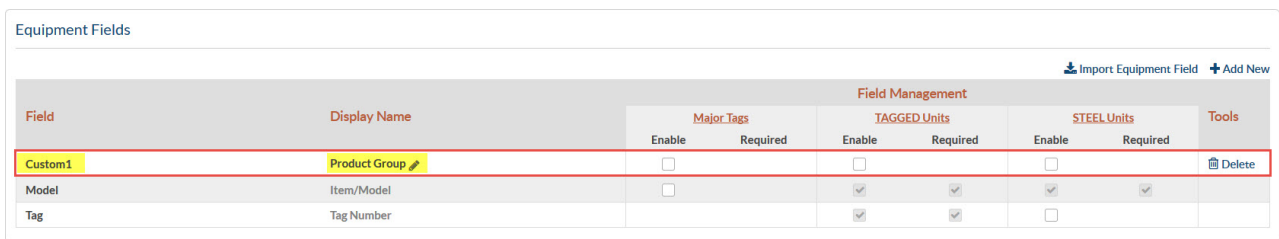
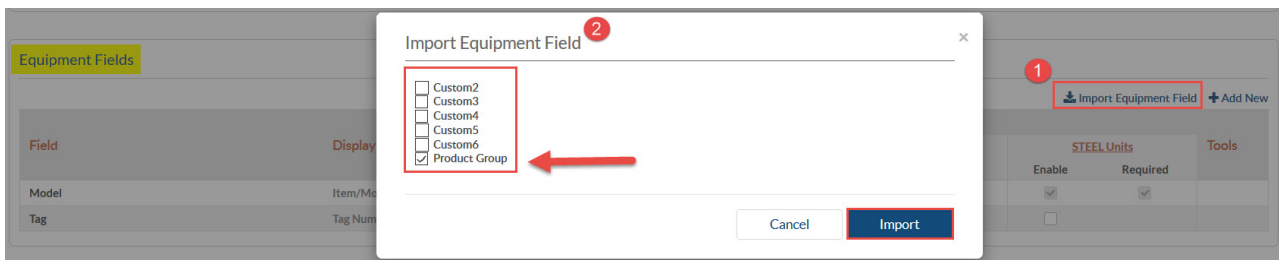
Project Equipment Fields

Project equipment fields can be modified from: Project Menu – Project Field Templates

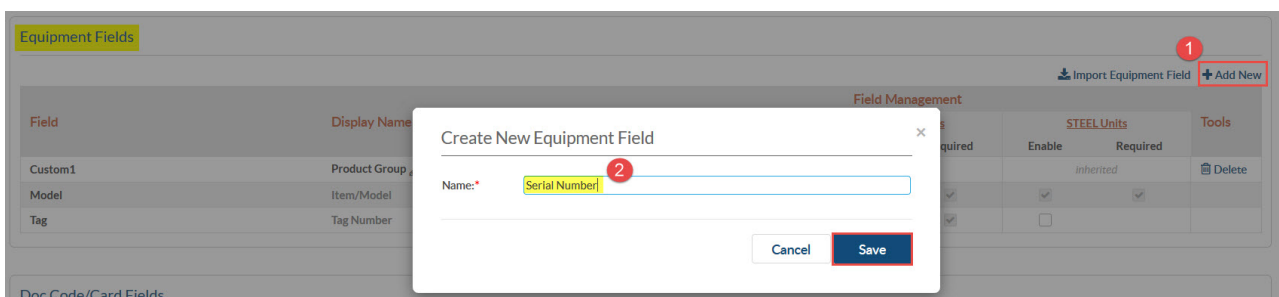


Import Global Equipment Fields

If you have created the field in the global area, you can add it to the project by clicking "Import Equipment Field", and selecting the field to add. Note that this keeps the custom ID the same as all other projects, making it easier to re-use templates across projects (same variable for the data).



Add an Equipment Field directly to the Project (project-only fields).



When adding a project equipment field you will notice that its ID starts at Custom1000. This will help you to difference between Global Equipment Fields and specific Project Equipment Fields. Remember - project fields will NOT be available for other projects, but MAY be saved back to our project template.

Enable the fields

After adding the fields, you can then decide how to enabled them on the projects. Here is the results after adding the two fields:

Equipment Fields		Field Management						Tools
Field	Display Name	Major Tags		TAGGED Units		STEEL Units		Delete
		Enable	Required	Enable	Required	Enable	Required	
Custom1	Product Group	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		Delete
Custom1000	Serial Number	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		Delete
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Tag	Tag Number			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Options

- Enter the name you want to be displayed as your Field (column) Header as the Display Name
- Check off if you want it Enabled on your project
- If you want it mandatory to complete this field you can mark it as Required

Where do I enter the values?

Equipment List - is where you can enter/edit the values

Tagged Equipment Units							
Select	Wolfe PA Line N...	Item/Model	Tag Number	Sub-Supplier	Product Group ↓	Type	
<input type="checkbox"/>	1	Blind	8244	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	2	Blind	7036	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	3	Blind	3328	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	4	Blind	1576	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	5	Blind	8109	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	6	Blind	7039	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	7	Blind	8248	Sub-Supplier 1	Y	Stainless Steel	
<input type="checkbox"/>	243	Paddle blank & spacer	8403	Sub-Supplier 1	X	Cast Material	
<input type="checkbox"/>	244	Paddle blank & spacer	1900	Sub-Supplier 1	X	Cast Material	

How are they linked to my cards?

If you look at the card list - you will see the list of custom values related to the card. It shows the unique values from all linked equipment.

Card List						
	Required	Doc Code	Title	Chiyod Doc #†	Type List ▼	Product Group List ▼
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MRB	Manufacturing Record Book	Document Number to be provided by Com	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BOM	Bill of Material	P7564-PO018-400-30-BOM-0010	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0001		X
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0002	Stainless Steel	Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITP	Inspection and Test Plan	P7564-PO018-400-30-ITP-0001	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MRBI	Manufacturing Record Book Index	P7564-PO018-400-30-MRBI-0009	Stainless Steel	X, Y

In each case, these fields can be put onto templates using the variables based on their ID's: i.e. CustomX and CustomX_List