

# Add Custom Equipment Fields

09/26/2024 9:57 am 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.

Hi, Edit your profile

- Users
  - Manage Users
  - View Permissions
  - Manage Sub-Supplier Accounts
- Library
  - Manage Library
  - Library Folders
- Lists
  - Companies
  - Contacts
  - Relationships
  - Jobs
- Reports
  - Project Metrics
  - Assignment Activity (By User)
- Admin
  - General
  - Security Settings
  - Stage Lists
  - Distribution Lists
  - Compil. & Pkg Presets (List)
  - Queries List
  - Custom Levels
  - Routing Scenario
  - Generation Status
  - Other Lists
  - External Company Mapping
- Customization
  - Project (Main) Fields
  - Library Card Fields
  - Doc Code/Card Fields
  - Equipment Fields
  - Custom Lists (for fields)
  - Project Templates
  - Labels
- Template Mgmt
  - Output Templates

Here you can:

Admin / Customization  
Equipment Fields

ID	Variable	Name	Add this field to new Project templates	Tools
1	Custom1	Product Group	<input checked="" type="checkbox"/>	
2	Custom2	Serial Number	<input checked="" type="checkbox"/>	
3	Custom3	Shipment	<input checked="" type="checkbox"/>	
4	Custom4	Product Type	<input checked="" type="checkbox"/>	

No more pages | Show on Page: 20

Save

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

Once the equipment fields have been created, these have to be enabled in the Project Template.

## Enabling the Equipment Fields for New Projects

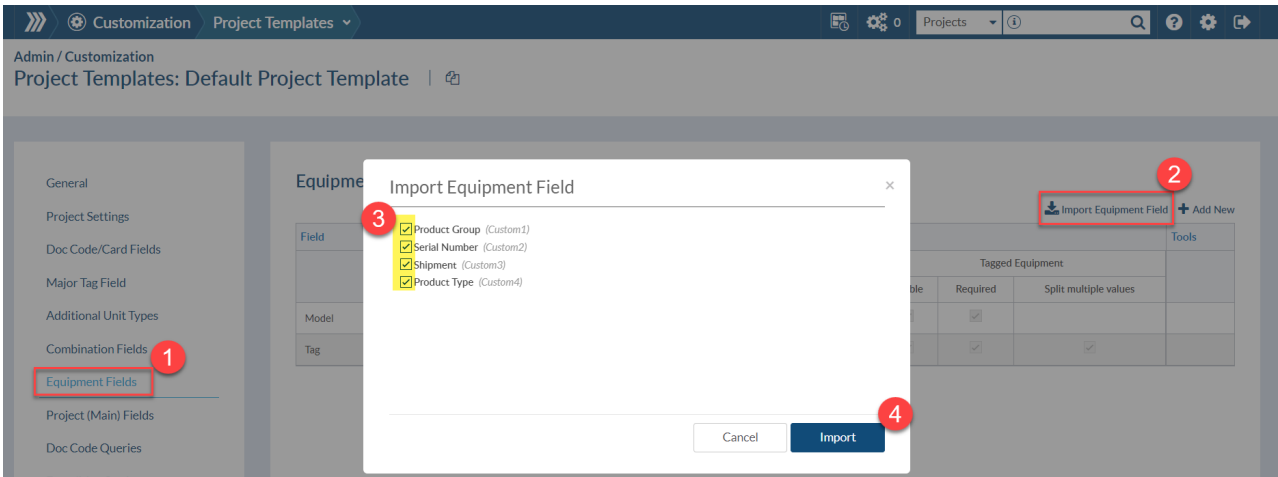
To enable the fields for **NEW** Projects only, navigate to **Settings (Gear) > Customization > Project Templates** and click on your Project Template.

The screenshot shows the software's main dashboard. In the top right corner, a gear icon (Settings) is highlighted with a red box and a red circle containing the number '1'. Below the dashboard, the 'Admin' menu is open, and the 'Customization' sub-menu is selected. Within 'Customization', the 'Project Templates' option is highlighted with a red box and a red circle containing the number '2'. Below this, the 'Project Templates' page is shown. The breadcrumb trail reads 'Admin / Customization Project Templates'. A table lists project templates, with the first row highlighted in yellow. A red arrow points to the 'Default Project Template' entry in the table.

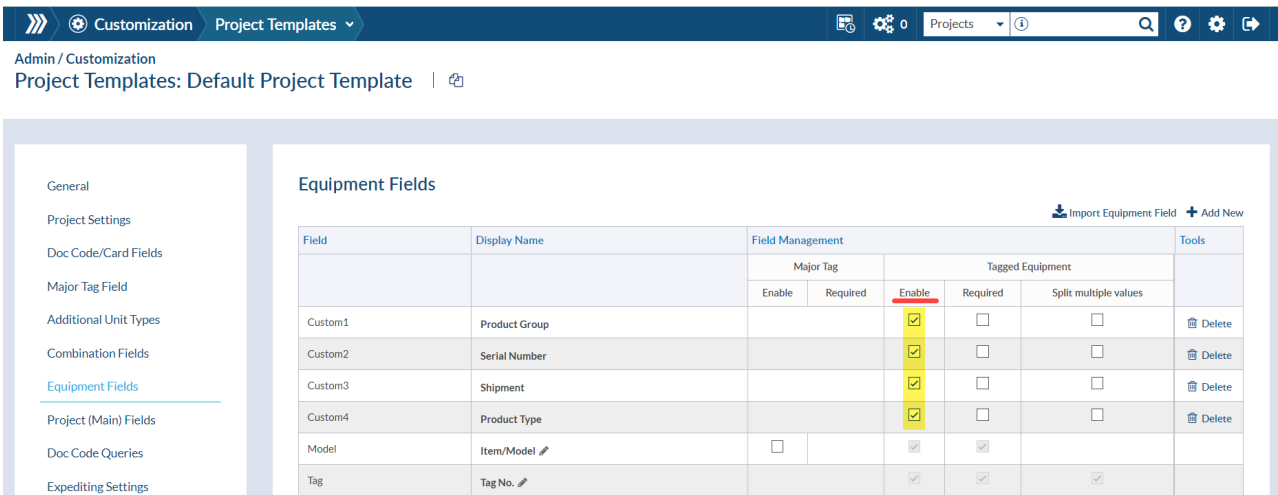
Name 1	Name Prefix	Owner	Affiliate List	Tools	ID
Default Project Template	Wolfe PA	Tunde Dorloti	Wolfe PA		8806

No more pages | Show on Page: 20 | Hide disabled templates

Here navigate to **Equipment Fields** section > click on **Import Equipment Field** > select the custom fields you wish to add and click on **Import**.



Once the custom fields are added to the grid they should be Enabled.



Optionally there is also the option to set them as requested and make the field mandatory when adding the equipment units.

### Equipment Fields

Field	Display Name	Field Management					Tools
		Major Tag		Tagged Equipment			
		Enable	Required	Enable	Required	Split multiple values	
Custom1	Product Group			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Delete
Custom2	Serial Number			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Custom3	Shipment			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Custom4	Product Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tag	Tag No.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

And also enable Split Multiple Values when using Multiple Quantity Upload option.

## Equipment Fields

[Import Equipment Field](#) [+ Add New](#)

Field	Display Name	Field Management					Tools
		Major Tag		Tagged Equipment			
		Enable	Required	Enable	Required	Split multiple values	
Custom1	Product Group			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete
Custom2	Serial Number			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Custom3	Shipment			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Custom4	Product Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tag	Tag No.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

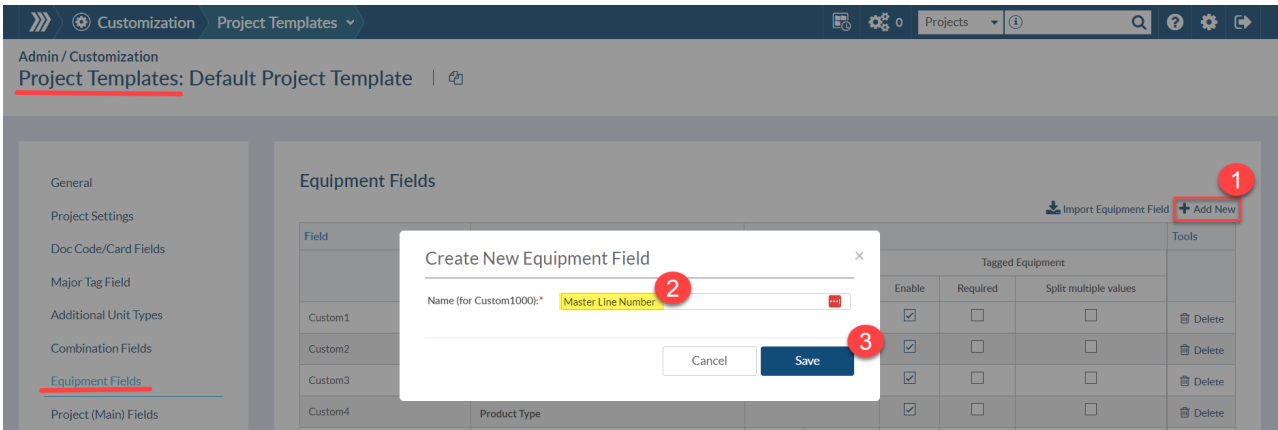
## Enabling the Equipment Fields for Existing Projects

To enable the fields on **EXISTING** Projects, navigate to your Project > click on the Project Menu > Project Templates.

The screenshot shows the software interface for Project 18 - 4531TD-5. The top navigation bar includes 'Project 18 - 4531TD-5', 'Card List', and 'Projects'. The 'Card List' dropdown menu is highlighted with a red box and a red circle containing the number '1'. The 'Project Template' option in the 'Set Up' menu is highlighted with a yellow background and a red circle containing the number '2'.

Here follow the steps included above in *Enabling the Equipment Fields for New Projects* section to import and enable (and optionally set as required and split multiple values if needed).

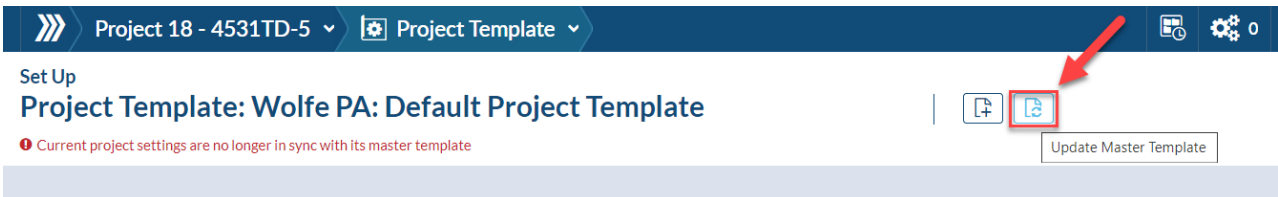
## Add an Equipment Field directly to the Project Template (project-only fields).



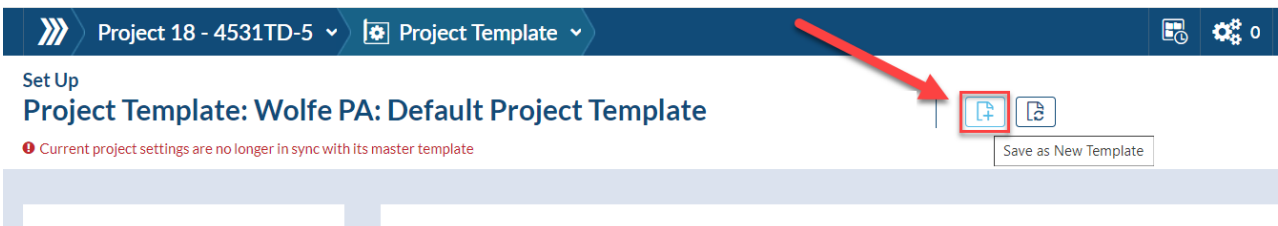
The ID of the equipment fields added directly to the Project Template project equipment field starts at Custom1000. This will help you to difference between Global Equipment Fields and specific Project Equipment Fields.

These Project Equipment Fields, can be added to the Project Template at admin level and they will be included in new Projects or they can be added in the Project Menu and will be applied only to the existing Project. Keep in mind that once the fields are added, these have to be always enabled (and optionally set as required and split multiple values).

When there are changes applied to the Project Templates in the Project Menu, there is also the possibility to save back to Admin Project Template:



Or even save as a new Admin Project Template which can be re-used on future Projects.



## 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 I	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 #1	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