

Add Custom Doc Code/Card Fields

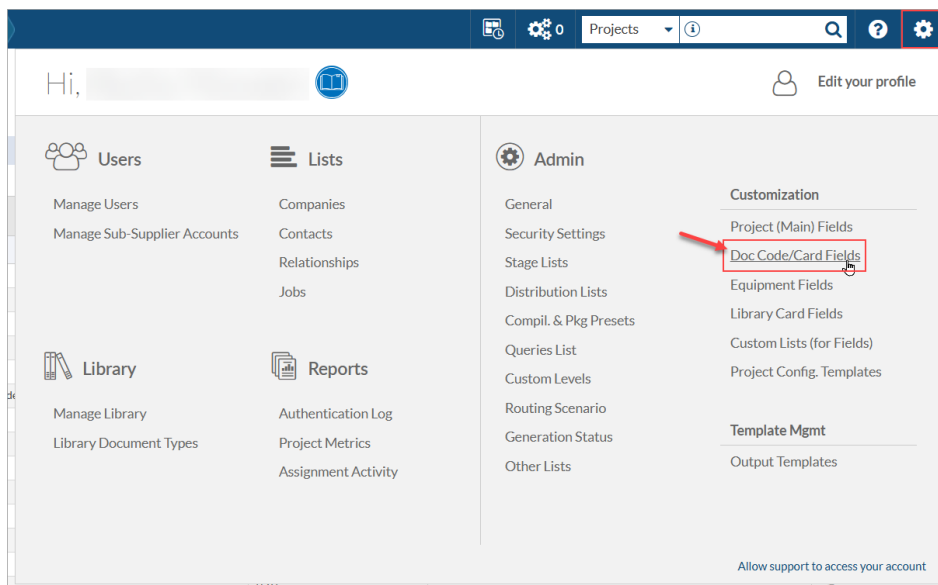
10/03/2025 11:48 am MDT

You can add custom fields to your cards. Here's how to create and manage them.

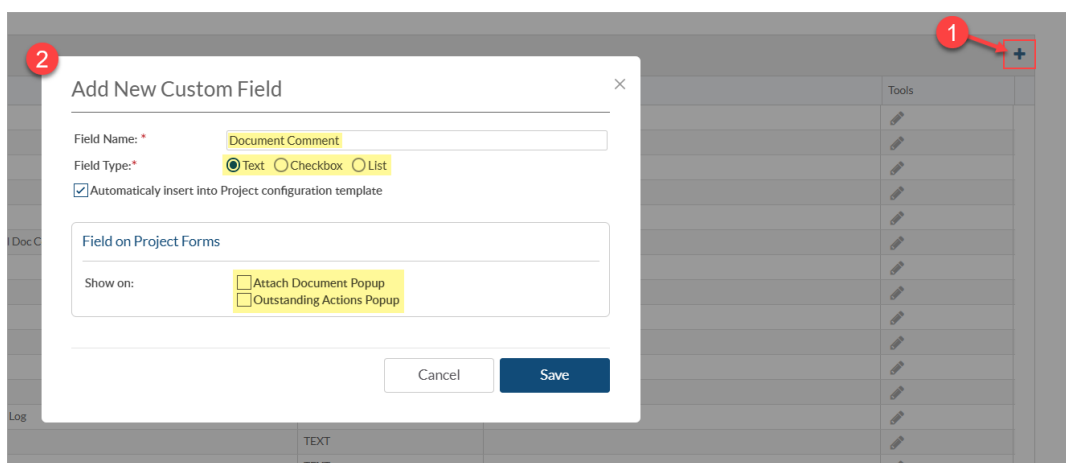
How to create a Card Field

The initial set up of the custom Doc Code / Card Field must be done by an **Admin User**. Once created, they can be enabled or disabled on any project.

To create a custom doc code/card field, navigate to **Admin > Customization > Doc Code/Card Fields**.



To add a new doc code/card field, click the "+" icon above the grid (top right). From the pop-up, give the new field a name and adjust the options as needed.



- **Field Type:** This is how you will enter the information into the custom column
 - Text - Simple text field for entry by users.
 - Checkbox - Yes/No field
 - List - Only specific values can be selected. The list can be a pre-existing user list, or a list you create (custom list). For more information, see this article: [Create Lists for Custom Fields](#).

- **Automatically insert into Project configuration template:** Will automatically import the field on all project configuration templates. To enable the field, see the instructions [below](#).
- **Field on Project Forms:** Display (and allow editing) of this field in the assign (or actions) scroll in screens.

Outstanding Action
Card: B01_123-5733
Review Progress (click to see full workflow): [Doc Controller](#)
Viewer [On](#) [Compare files](#) [History](#)

Drag and drop new file Or choose files from disk

Comments (Internal/Third-Party)

Drag and drop new file Or choose files from disk

Pages in Document

Routings

Document Card Numbers

Custom Field(s)

Document Comment

How to enable the Card Field on your project

Once the Custom Fields have been created, you must enable them on the project from the **Project Configuration** page (if not automatically added at the time of creation). To do this, navigate to Project Menu > Set Up > Project Configuration. Open the "Fields & Equipment Types" tab and expand the "Doc Code / Card Fields" section.

This will list all Custom Columns that have been created at the admin level. Now you can Enable or Disable accordingly to meet your project requirements.

Pump Project (1234) Project Configuration

Set Up
Project Configuration

Main Advanced **Fields & Equipment Types** Compilation & Package Presets Expediting Info

Equipment

Equipment Fields

Additional Unit Types

Major Tag Field

Doc Codes and Cards

Doc Code / Card Fields

Import Doc Code / Card Field

Display Name Variable	Type	Current Status	
Note CustField1	Text	Enabled	
Discipline CustField2	Checkbox	Enabled	
Description CustField3	Text	Enabled	
Area CustField4	Text	Enabled	

Project

Project Main Fields


Once you have made the changes, you can leave as is and columns will be applied to your project accordingly. You also have the option to "Save as New Template" or Overwrite Currently Selected Template. By saving the template, (new or overwrite) it will allow you to select for future projects so that you do not have to modify manually each time.

Where you will see your custom column.

In the screen above it shows the "Document Comments" enabled. So lets see where you would find this field on your project.

Cards

Code List (Requirements)














































 Grid Rows Colors

Document Requirements

Select	Internal Code	Doc Code [†]	Doc Name	Document Comment	Level
<input type="checkbox"/>	L00 (Lists)	BOM	Bill of Material	<input type="text"/>	Order
<input type="checkbox"/>	D00 (Drawings)	DMD	Dimensional Drawing		Custom1
<input type="checkbox"/>	L00 (Lists)	ITP	Inspection and Test Plan		Order
<input type="checkbox"/>	R00 (Compilations)	MRB	Manufacturing Record Book		Order
<input type="checkbox"/>	R00 (Compilations)	MRBI	Manufacturing Record Book Index		Order
<input type="checkbox"/>	P00 (Procedures)	PRO	Dye Penetrant Examination Procedure		Order
<input type="checkbox"/>	P00 (Procedures)	PRO	Hardness Test Procedure		Order
<input type="checkbox"/>	P00 (Procedures)	PRO	Heat Treatment Procedure		Order
<input type="checkbox"/>	P00 (Procedures)	PRO	HIC Testing procedure		Order
<input type="checkbox"/>	P00 (Procedures)	PRO	Impact Test Procedure		Order

Card List

Card List

	Required	Doc Code	Title	Document Comment 	Tools
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	<input type="text"/>	   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITP	Inspection and Test Plan		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MRB	Manufacturing Record Book		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Hardness Test Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Dye Penetrant Examination Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Heat Treatment Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	HIC Testing procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Impact Test Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Magnetic Particle Test Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Packing, Shipping & Preservation Procedure		   
<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRO	Ultrasonic Test Procedure		   

Assign(Edit) roll in screen

Processing

2019-01-29.pdf

Viewer **Off**

History

Cover page only (no stamp)

Comments

Comments for NEXT Chiyod transmittal

Drag and drop new file
 Or choose files from disk

Comments for NEXT Sub-Supplier transmittal

Drag and drop new file
 Or choose files from disk

Internal Comments

Drag and drop new file
 Or choose files from disk

Custom Field(s)

Document Comment

Outstanding Actions**Actions**

Card Name(Auto) ▾	Title ▾	Level ▾	Customer Doc # ▾	Document Comment ▾	Project name ▾
A01 123456	Suppliers Document Index	Order	78604		Example 1 Project Valves (123456)
E02 FW-410A	Cross Sect Dwg / Exploded View Diagram	Item/Model (TE)	E02-0003-001-2		Condenser Units (S789789)
I03 B1010-9	Quality Plan	Order	TEST TEST		Condenser Units (Large) (S20140617-1)
L15 897943	Material Certs (Each Heat)	Heat/Cert			Sun - Pump Packages TC (S20150724)
L15 Imp1234	Material Certs (Each Heat)	Heat/Cert			Sun - Pump Packages TC (S20150724)

NOTE:

If you can not find the column on a specific grid, be sure that it is enabled to view.

1. Mouse over any column Header and click the down arrow
2. Scroll across the word "columns" until the selections become visible.
3. Anything that is checked off will appear in your grid. (Clicking on



will bring that column to the far left of the grid)

Document Comment ▾	Tools	Required	Doc Code	Title	Reference	Card Name(Auto) ↑	Status (Combined)
		Sort Ascending		Document Register	1234	A01 1234	X(+)
		Sort Descending		Document Schedule	1234	AA 1234	Z
		Columns				AC 4529KJR-AC-0...	NULL
		Fit to header		<input checked="" type="checkbox"/> Document Comment		AC Ball Valves	X.(P)(+).ce
		Fit to content		<input checked="" type="checkbox"/> Tools		AC Butterfly Valves	NULL
		Auto fit		<input checked="" type="checkbox"/> Required		AC Gate Valves	X.(A)+
		Set as 1st column		<input checked="" type="checkbox"/> Doc Code		CD 1	X+
				<input checked="" type="checkbox"/> Title		CD 2	X
				<input type="checkbox"/> Sub-Supplier List		CD LT-101	Z
				<input checked="" type="checkbox"/> Reference		CD LT-101	Z
						CD LT-102	Z
						CD LT-103	Z

