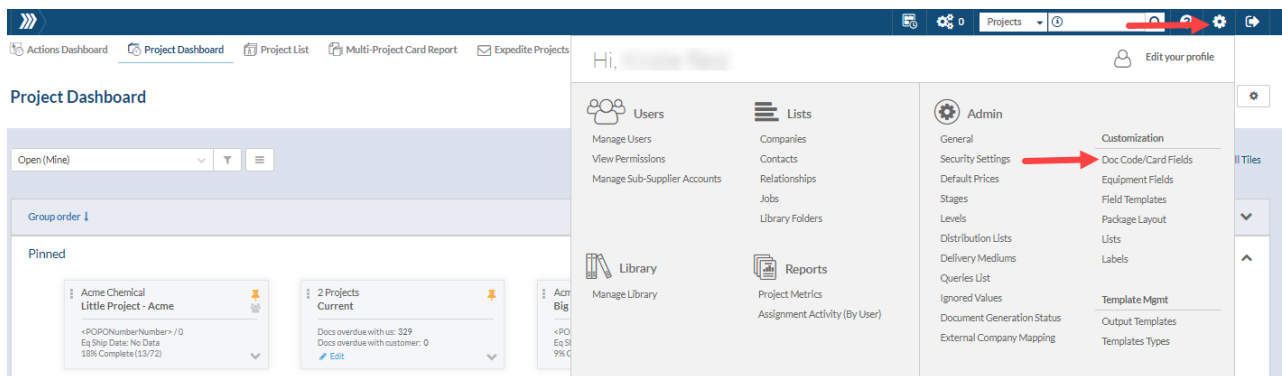# Add Custom Doc Code/Card Fields

09/16/2024 1:32 pm MDT

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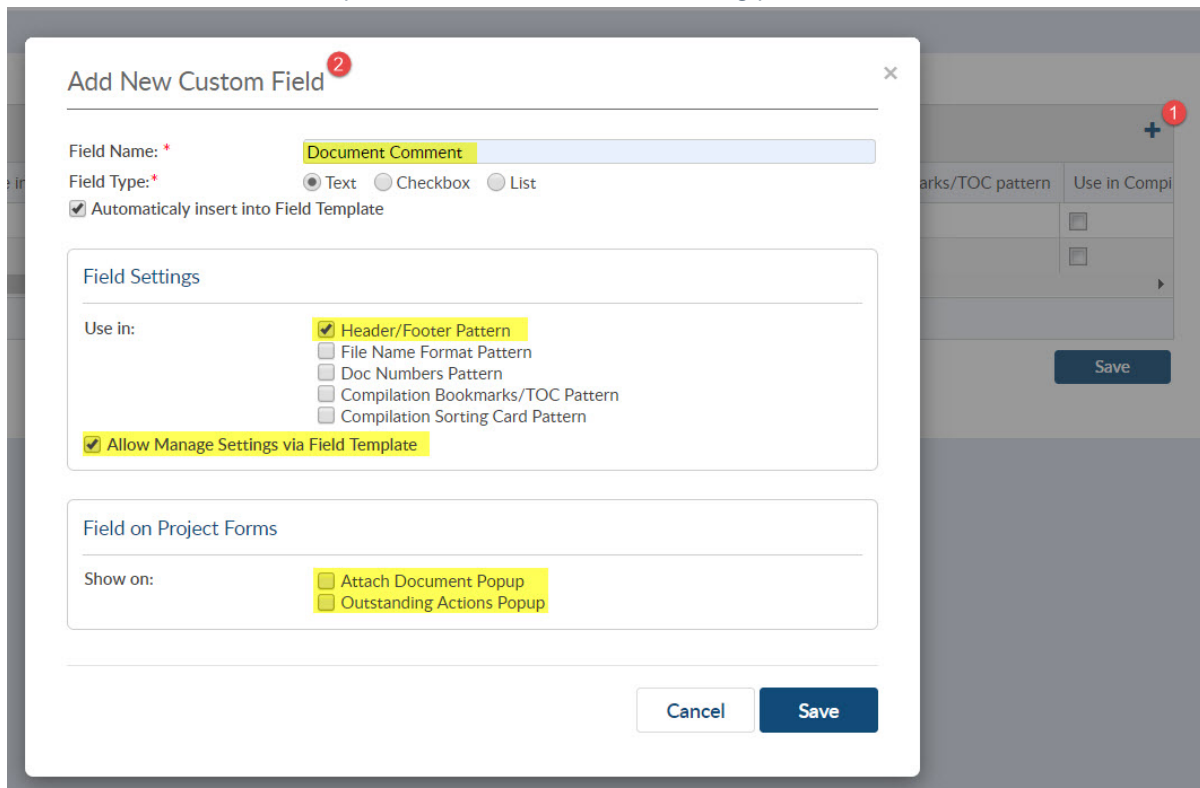
How to create a Card Field

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 Get Here: Admin> (Customization) Doc Code/Card Fields

You will then need to ADD (1) your field and customize it accordingly

- 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 on using lists see our article here.

- Field Settings:
  - Make the field available as a variable to use inside other fields. e.g. use the data from this field inside the header/footer.

Document Header Format

Job	Project Name	Sales Order/Quote	PO Number	Current Date	Page Number	Total Pages	Doc Code	Doc Ref
Doc Name	Title	Chiyod Doc #	Wolfe PA Rev #	Wolfe PA Doc #	Sub-Supplier Doc #	ADNOC Doc #	TagList	Eq# List
Wolfe PA Line# List	File Extension	Other Data1	Other Data2	Other Data3	Other Data4	Other Data5	Other Data6
Custom1 List	Document Comment

Use OR operator to take first non-null value. OR must be in caps, and the only two characters b/w two variables

`<Title><DocumentComment>`

Align [Left ▼]   Offset [0]

Document Footer Format

Job	Project Name	Sales Order/Quote	PO Number	Current Date	Page Number	Total Pages	Doc Code	Doc Ref
Doc Name	Title	Chiyod Doc #	Wolfe PA Rev #	Wolfe PA Doc #	Sub-Supplier Doc #	ADNOC Doc #	TagList	Eq# List
Wolfe PA Line# List	File Extension	Other Data1	Other Data2	Other Data3	Other Data4	Other Data5	Other Data6
Custom1 List	Document Comment

Use OR operator to take first non-null value. OR must be in caps, and the only two characters b/w two variables

`Document: <SupplierDocNumber> Page: <PageNumber> of <TotalPages>`

Align [Left ▼]   Offset [0]

- Allow manage via Project Fields Template: Let user enable/disable the field on a project by project basis. (See below)
- Field on project forms:
  - - Display (and allow editing) of this field in the assign (or actions) scroll in screens.

Processing

2019-01-29.pdf

Viewer [Off]   ⏱ History

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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

How to enable the Card Field on your project

Once the Custom Fields have been created, you must enable them on the project using the Project Fields Template. Navigate – Project Hub > (Set Up) Project Fields Template

Scroll to "Doc Code/Card Fields"

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.

#	Name	Type	Source	Variable	Settings	Use in Patterns					Current Status		
						Header/Footer	File Name Format	Doc Numbers	Compilation Bookmarks/TOC	Compilation Sorting Card			
1	Document Comment	Text		CustField2	🔍	☑	☑	☑	☑	☑	Enabled	⇄	🗑
2	Vendor Code Disc Code	Text		CustField3	🔍	☐	☐	☑	☐	☐	Disabled	⇄	🗑
3	Responsible User	Text		CustField4	🔍	☐	☐	☐	☐	☐	Disabled	⇄	🗑
4	End User Doc Code	Text		CustField5	🔍	☐	☐	☐	☐	☐	Disabled	⇄	🗑
5	DB	Text		CustField6	🔍	☐	☐	☐	☐	☐	Disabled	⇄	🗑

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
☐	L00 (Lists)	BOM	Bill of Material		Order
☐	D00 (Drawings)	DMD	Dimensional Drawing		Custom1
☐	L00 (Lists)	ITP	Inspection and Test Plan		Order
☐	R00 (Compilations)	MRB	Manufacturing Record Book		Order
☐	R00 (Compilations)	MRBI	Manufacturing Record Book Index		Order
☐	P00 (Procedures)	PRO	Dye Penetrant Examination Procedure		Order
☐	P00 (Procedures)	PRO	Hardness Test Procedure		Order
☐	P00 (Procedures)	PRO	Heat Treatment Procedure		Order
☐	P00 (Procedures)	PRO	HIC Testing procedure		Order
☐	P00 (Procedures)	PRO	Impact Test Procedure		Order

Card List

Card List

	Required	Doc Code	Title	Document Comment	Tools
☐	☑	DMD	Dimensional Drawing		🗐 📷 ✏ ⏱
☐	☑	ITP	Inspection and Test Plan		🗐 📷 ✏ ⏱
☐	☑	MRB	Manufacturing Record Book		🗐 📷 ✏ ⏱
☐	☑	PRO	Hardness Test Procedure		🗐 📷 ✏ ⏱
☐	☑	PRO	Dye Penetrant Examination Procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	Heat Treatment Procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	HIC Testing procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	Impact Test Procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	Magnetic Particle Test Procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	Packing, Shipping & Preservation Procedure		📎 🗐 📷 ✏ ⏱
☐	☑	PRO	Ultrasonic Test Procedure		📎 🗐 📷 ✏ ⏱

Assign(Edit) roll in screen

Processing

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Viewer Off   ⏱ History

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Comments

Comments for NEXT Chiyod transmittal

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[☁ 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)