

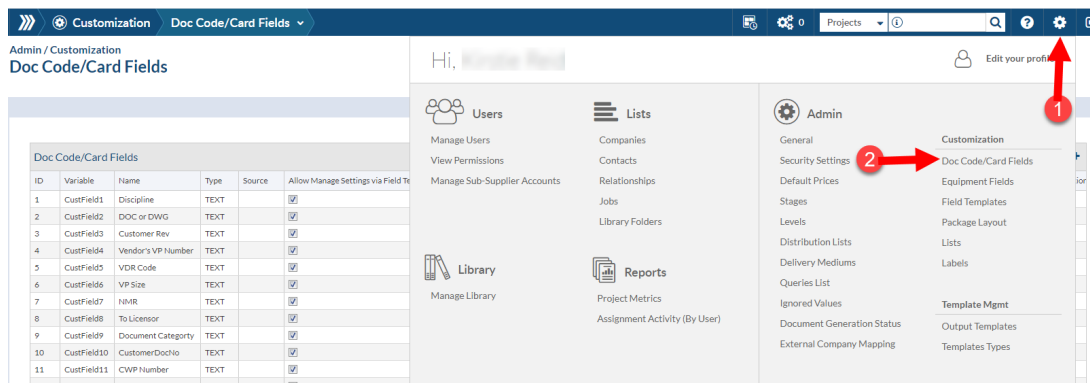
# Create custom lists for use in custom fields

09/16/2024 1:32 pm MDT

This article provides steps to set up and use custom fields where the type is "List". Using a list takes out any risk of typo's as it gives the user a list of pre-existing values to choose from, rather than typing in the values. You have the option to select from existing lists or to create new lists. You also have the option to set a value of your choice as the default.

## To get started:

1. Navigate to the Admin Menu
2. Select Doc Code/Card Fields screen



## Choose from Existing List:

1. Click to Add New Custom Field and name it
2. Select "List" as the Field Type
3. Click the dropdown menu to select the Source by either choosing from existing list OR see below for more options.
4. Ensure you leave "Automatically insert into Field Template" checked off to automatically include this Custom field in each of your projects.

Customization Doc Code/Card Fields

Admin / Customization  
Doc Code/Card Fields

ID	Variable	Name	Type	Source	Allow Manage Settings via
1	CustField1	Discipline	TEXT		<input checked="" type="checkbox"/>

Add New Custom Field

Field Name: \*

Field Type: \*  Text  Checkbox  List

Source: \* - Select From List -

Automatically insert into Field Template

Field Settings

Use in:

Header/Footer Pattern

File Name Format Pattern

Doc Numbers Pattern

Compilation Bookmarks/TOC Pattern

Compilation Sorting Card Pattern

Allow Manage Settings via Field Template

Field on Project Forms

Show on:

Attach Document Popup

Outstanding Actions Popup

Cancel Save

1

2

3

4

+

## Create your Own values:

1. Click + to Add new List
2. Give the list a name.
3. Add values
4. Choose default (optional)
5. Click + to add the values to the new list
6. Save

**Add New Custom Field**

Field Name: \*

Field Type: \*  Text  Checkbox  List

Source \* - Select From List - + **1**

Automatically insert into Field Template

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**Create List**

List Name: \* **2** DOC or DWG

Create own values  Source from users list  Source from DISTY list

Values			
Value	Default	Tools	
DOC	<input type="checkbox"/>	<input type="checkbox"/>	
DWG <b>3</b>	<input type="checkbox"/> <b>4</b>	<input type="checkbox"/> <b>5</b>	

Add

Cancel Save **6**

**OR:**

### Source from User List:

1. Click + to Add new List
2. Give the list a name.
3. Select List Type: Source from users list
4. Add values
5. Choose default (optional)
6. Save

**Add New Custom Field**

Field Name: \* Prepared by

Field Type: \*  Text  Checkbox  List

Source \* - Select From List - + 1

Automatically insert into Field Template

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**Create List**

List Name: \* 2 Prepared by Users

Create own val 3  Source from users list  Source from DISTY list

Value	Default	Tools	
Bailey Stella	<input type="checkbox"/> 5		
Charles Hochachka	<input type="checkbox"/>		

+ 4

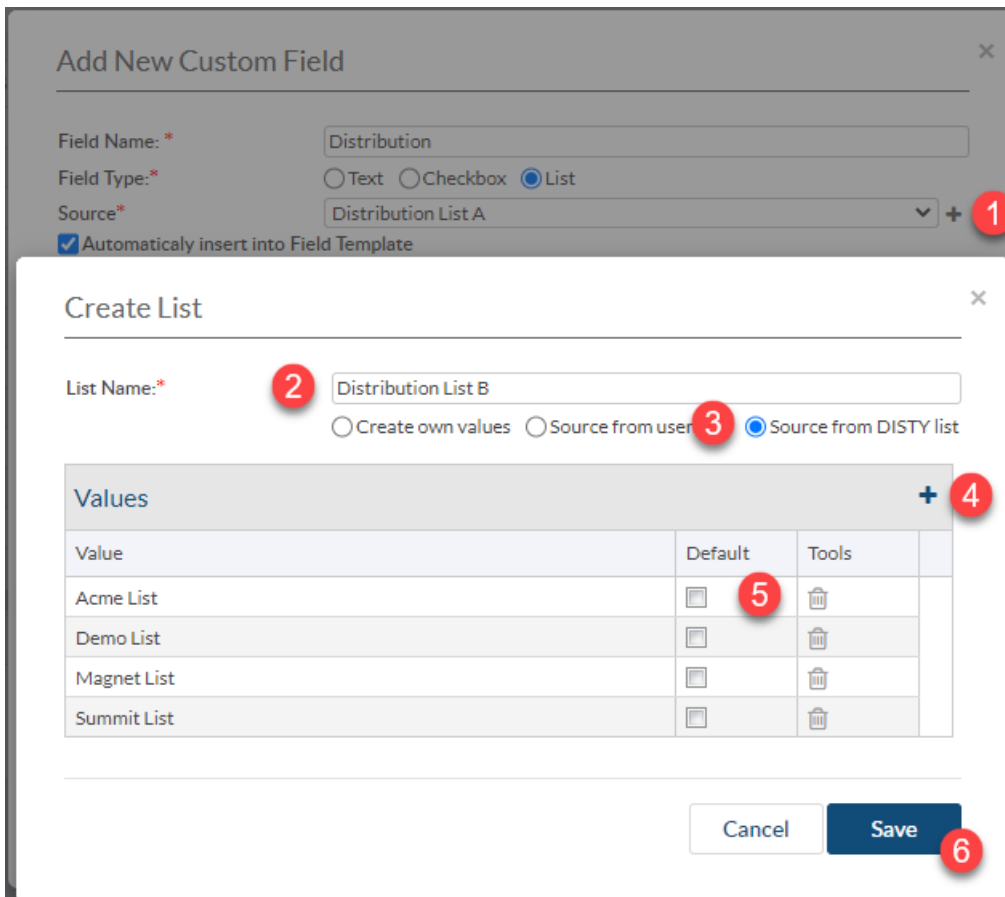
Cancel Save 6

**OR:**

### Source from DISTY (Distribution) List:

Not used often but if you had a Contractor / Engineering Partner this will allow you to choose their distribution list.

1. Click + to Add new List
2. Give the list a name.
3. Select List Type: Source from DISTY List
4. Click + to select from existing Distribution Lists
5. Choose default (optional)
6. Save

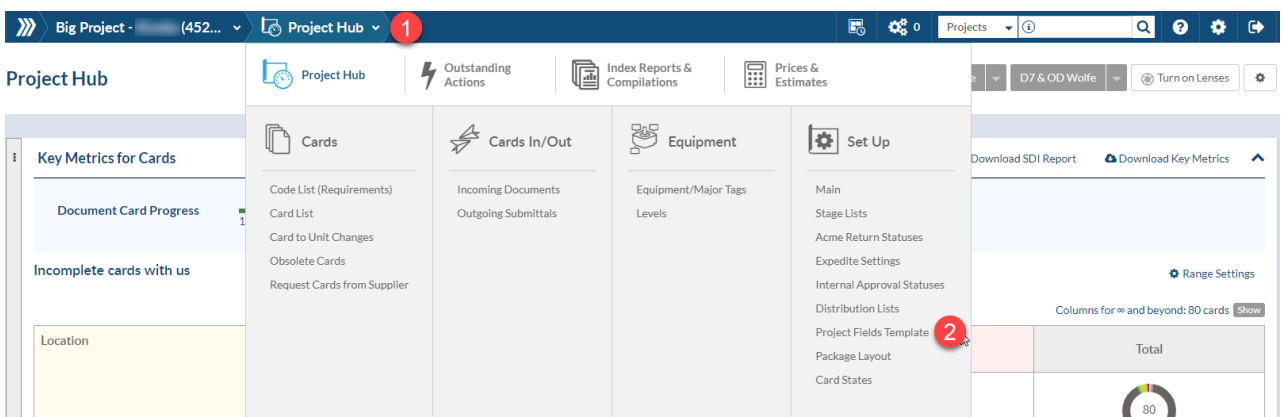


After adding the users and creating the new custom columns, the following steps are to enable the new fields on the Project Fields Template.

## Final Step

Once the Custom Fields have been created, you must enable them on the project using the Project Fields Template.





Navigate to your project then Project Hub > (Set Up) Project Fields Template



Scroll down 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.

#### Doc Code/Card Fields

#	Name	Type	Source	Variable	Settings	Use in Patterns					Current Status
						Header/Footer	File Name Format	Doc Numbers	Compilation Bookmarks/TOC	Compilation Sorting Card	
1	Discipline	Text		CustField1	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled  
12	USERS	List	<a href="#">Users</a>	CustField12	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disabled  
13	DOC or DWG List	List	<a href="#">DOC or DWG</a>	CustField13	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Enabled  
14	Distribution	List	<a href="#">Distribution List A</a>	CustField14	Q	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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.

For more information about creating and enabling custom fields on your project, see our article: [Add Custom Doc Code/Card Fields](#).

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