Create custom lists for use in custom fields

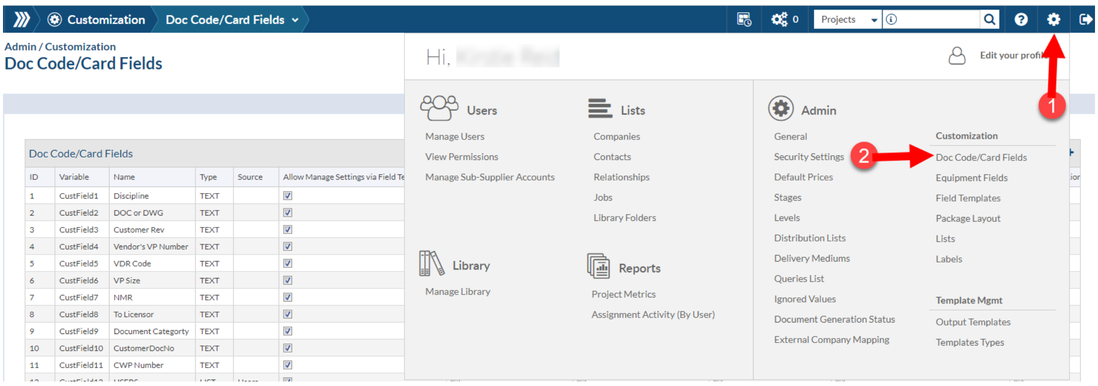
09/16/2024 1:32 pm MDT

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



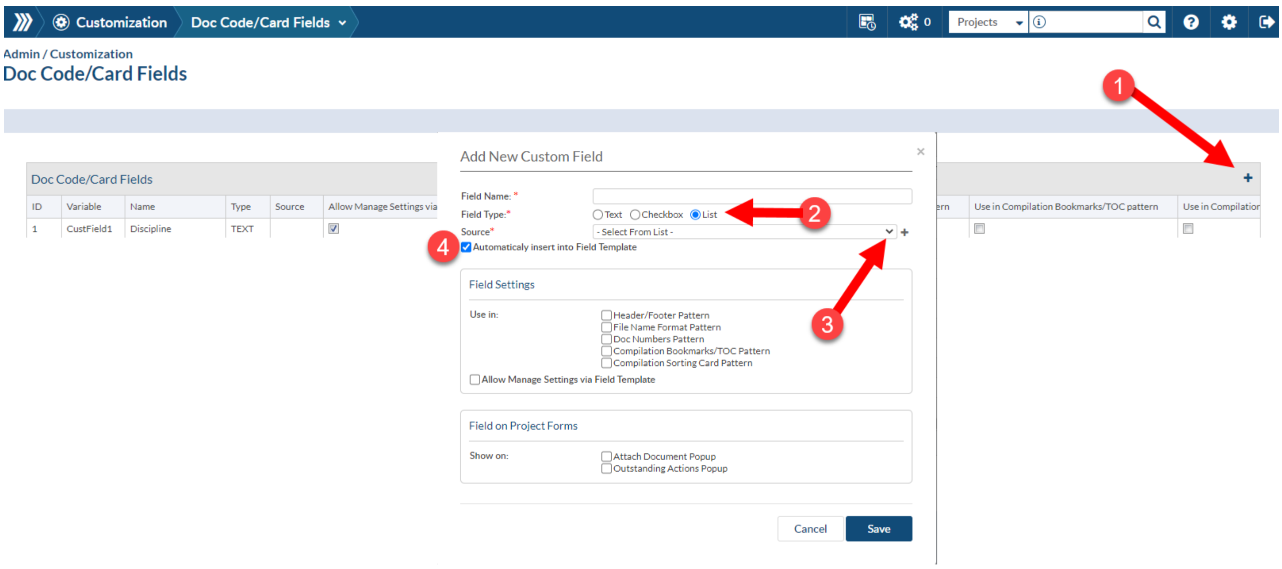
Choose from Existing List:

1. Click to Add New Custom Field and name it

2. Select "List" as the Field Type

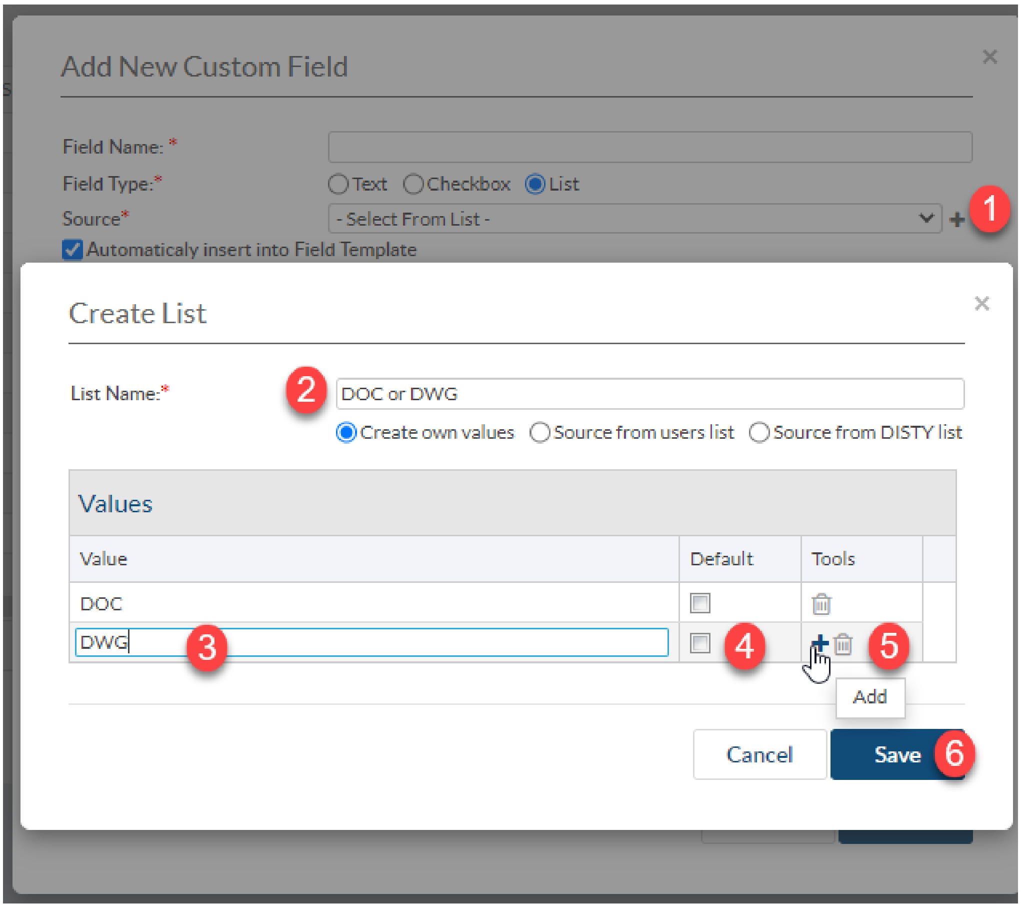
3. Click the dropdown menu to select the Source by either choosing from existing list OR see below for more options.

4. Ensure you leave "Automatically insert into Field Template" checked off to automatically include this Custom field in each of your projects.



Create your Own values:

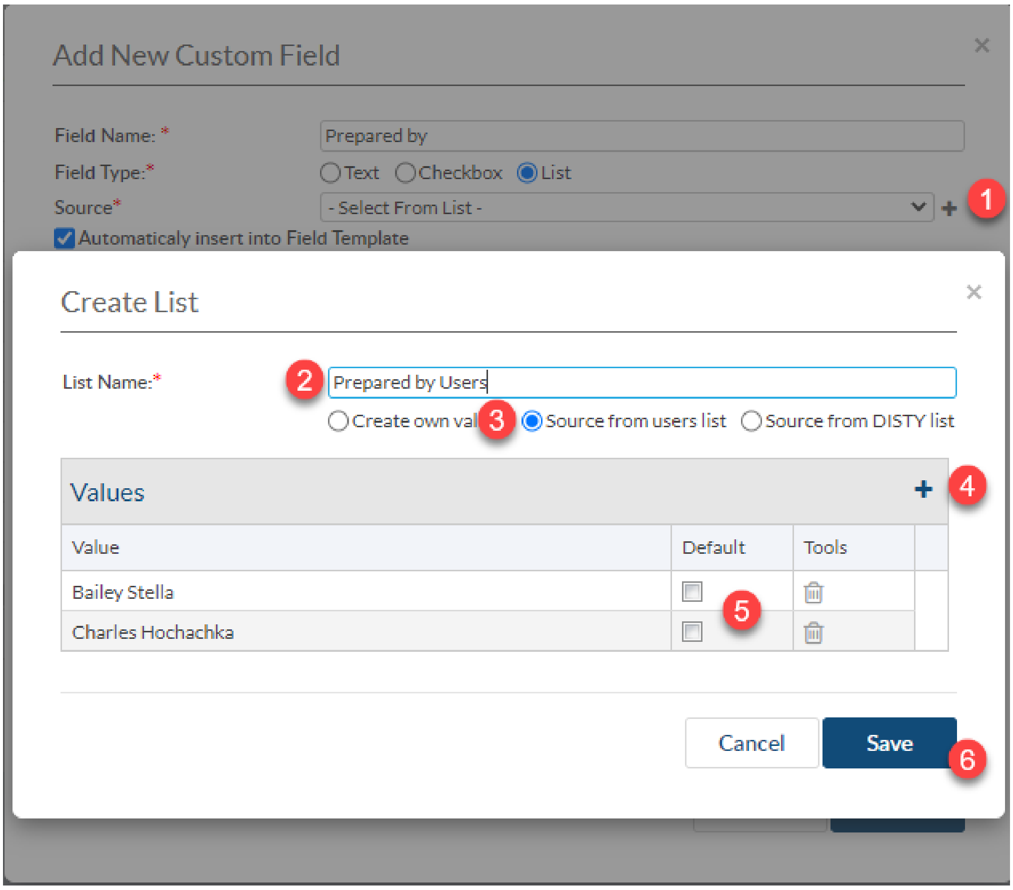
1. Click + to Add new List
2. Give the list a name.
3. Add values
4. Choose default (optional)
5. Click + to add the values to the new list
6. Save



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

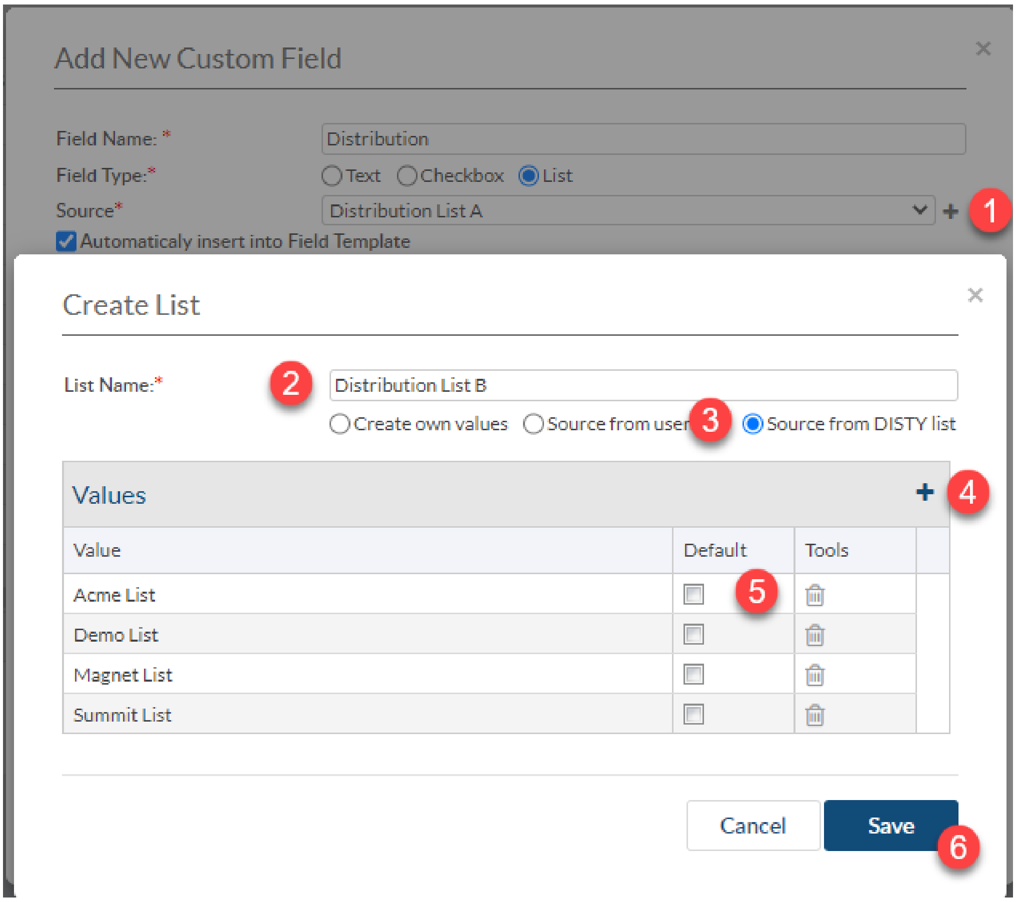


OR:

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

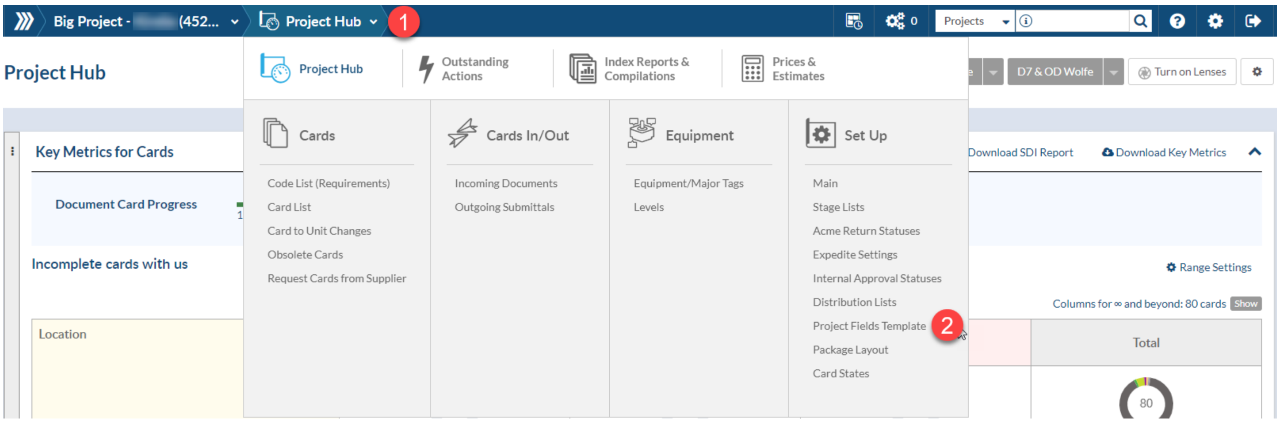


After adding the users and creating the new custom columns, the following steps are to enable the new fields on the Project Fields Template.

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		☐	☐	☑	☐	☐	Disabled		
12	USERS	List	Users	CustField12		☐	☐	☐	☐	☐	Disabled		
13	DOC or DWG List	List	DOC or DWG	CustField13		☐	☐	☐	☐	☐	Enabled		
14	Distribution	List	Distribution List A	CustField14		☐	☐	☐	☐	☐	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.