

# **INVENTORY**

# PARTS - EDIT PART DEFINITION USER DEFINED

An Additional Data panel has been added to the Part Maintain screens: the Add new part screen and the Edit Part screen.

User defined fields in Nucleus Service enable the user to provide more information within a module so that work or associated processes can be carried out more efficiently.

These custom fields benefit the user in the following ways:

- They cut down the transition time between screens.
- They reduce the amount of screens open in order to find information.

In essence these fields serve as a shortcut, so that users do not have to leave the listing or maintain fields affected.

At present, these fields in the **Inventory - Parts** module can be used to add extra information relevant to the selected part definition.

The added fields will reflect in the **User Defined** panel in the **Add new Part** screen and the **Edit Part** screen across all part definitions on the system, but the **Variable Values** selected for each **User Defined** field will be <u>unique</u> to the selected part definition.

This topic will expand on how to **edit** the User Defined custom fields for a selected part definition.



Not all custom fields can be edited in the same way, it depends on what <u>Input</u> <u>Type</u> they have been set up with.

Note: It will be useful to familiarise yourself with the <u>Add Part Definition User</u> <u>Defined</u> topic before progressing with this manual.

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• The Part Listing screen will open.

# **SELECT PART DEFINITION**

- The data grid will display a list of <u>all</u> the part definitions currently on the system.
- Select the **row** of the part definition where you wish to edit the User Defined custom fields.

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• Click on **Edit**.



- The Edit Part [] screen will open.
- If the **User Defined** panel is not already extended, click on the **tab.**

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- The User Defined panel will open.
- In this example, there are **custom fields** already set up in the system.
- The **Code** and **Code Description** fields will reflect across **all** part definitions.
- The data entered or added to the Variable Value field is <u>unique</u> to the selected part definition and will <u>not</u> reflect in any other part or other module User Defined fields.

Note: The content of these fields can be populated according to individual company requirements. The examples given here are pertinent to the system being demonstrated and are not universal.



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Although the data selected or entered into the **Variable Value** field is unique to the selected part definition, the <u>Input Type</u> set up in the **Variable Value** field will reflect across all part definitions.

The capacity to edit the **Variable Value** field will then depend on the Input Type set up:

# EDIT VARIABLE VALUES

#### LOOKUP LIST

- In this example, the **TR001 Technician Required** User Defined field has a **Lookup list** as the Input Type.
- Currently, the Variable Value is CST.



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- Click in the Variable Value field.
- A drop-down arrow and list will appear this is a Lookup List Input Type.
- Select the **row** of the alternative **Type** you wish to link to this custom field.
  - In this example, PST Product Specific Technician is selected.

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• The edited selection will populate the Variable Value field.



#### **FREE INPUT TEXT**

- In the next example, the **PCM Paper Capacity Max** User Defined field has **Free Input Text** as the Input Type.
- Currently, the Variable Value is **4500**.
- Click in the Variable Value field and either modify the original text or delete and add new text, as required to make the correct changes.

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• The edited text will populate the Variable Value field.

#### **YES OR NO VALUE**

- In the next example, the IHI In-House Installation User Defined field has Yes or No value as the Input Type.
- Currently, the Variable Value is **Yes**.
- Click in the Variable Value field.



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- The "**Yes**" text will be replaced with a **check box** that is unselected.
- Click anywhere in the panel, outside of the Variable Value field.

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- 'No' will now populate the Variable Value field.
- When you have finished editing the **Variable Values** of the User Defined fields, click on **Save**.



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- Your changes will be saved and you will return to the **Part Listing** screen.
- The edited part definition will be selected in the data grid.

# **EDIT CUSTOM FIELDS**

Follow the processes set out below to edit the **custom fields**.

• Select the part definition where you wish to make changes to a custom field and click on **Edit**.

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		Ð		Toner Cyan		A	С	Retail - Office Supplies - Consumables	1	1		ea	1.00		Yes	VAT	15.00			Jan 1 190		
	_			Mag Roller		A	С	Retail - Office Supplies - Spares	1	1		ea	2.00		Yes	VAT	15.00			Jan 1 190		
		E	A965J-2671			A	С		1	1		ea	1.00		Yes	VAT	15.00			Jan 1 190		
			A965J-3295		ning Web	A	C	Retail - Office Supplies - Spares	1	1		69	2.00		Yes	VAT	15.00			Jan 1 190		
Processing			A965J-3671			Α.	B	Retail - Office Supplies - Accessories	2	2		ea	10.00		Yes	VAT	15.00			Jan 1 190		
Requisitions			A965J-4933			A	C	Retail - Office Supplies - Spares Retail - Office Supplies - Spares	1	1		ea	2.00		Yes	VAT	15.00			Jan 1 190 Jan 1 190		
			A9653-5084 A9653-5304			A	c	Retail - Office Supplies - Spares Retail - Office Supplies - Spares	1	1		ea	2.00		Yes	VAT	15.00			Jan 1 190 Jan 1 190		
			A965J-5304 A965J-5526		ruear	A	C	Retail - Office Supplies - Spares	1	1		ea	2.00		Yes	VAT	15.00			Jan 1 190		



## LOOKUP LIST

- Right-click in the **row** of the custom field where you wish to make changes.
  - $^\circ~$  Ensure that you have selected a custom field that has

#### Input Type: Lookup List.

- A Process menu will pop up.
- Click on Edit Edit Custom Field.

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🕘 Home Equ	ipment / Locations Co	ntract Finance / HR	Inventory Maintenance / Projects	Manufacturir	ig Procurement !	Sales Service	Reporting Utilities	- 0	×
	Workspaces								^
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	Model No	A500T		T 400	10c	ADC			
	Part Type	A Class Part	* *	TR001	Technician Required	PST	Process		User Defined
	Taxable			PCS	Paper Capacity Maximum	5200	= Add		Defin
Substitutes	Tax Rate		*	SH	Physical Location		Add New Custom Field		8
		Retail - Office Supplies - Equipme		PCM	In-House Installation Paper Capacity Standard	No 1750	Edit Edit Custom Field		
	Weight			POM	Paper Capacity Standard	1/30	Add new lookup item		
Documents	Volume						- Add new lookup item		
	Unit of Measure Single Supplier								
	Shelf Life								
BOMs	Shelf Life Period		*						
	Depreciation Method		*						
	Wear and Tear Method		*						
	Maintenance Craft		*						
	Manufacturer		P						
	Default Fee		*						
	Duty Cycle	1 🗘							
Processing	Life Cycle	1 ‡							
Requisitions Purchase Orders									
0.000									

- The Add new custom element screen will open.
  - ° Even though the screen title is Add new custom ele-

ment, you can edit the Description field from here.

### **Edit Code**

• This field is greyed out, it is <u>not</u> possible to edit the **Code** from this screen.



## **Edit Description**

• Click in this field and either add new text or remove text from the **Description**, as required.

## **Edit Input Type**

• This field is greyed out, it is <u>not</u> possible to edit the **Input Type:** Lookup List from this screen.

۰ ی					Add new (	custom element - Nucleus Service: V									
۲	Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		Ø	×
В	-														
Save															
Proc	ess														^
	Code	TR001	•												
	Description	Technician Required	•												
	Input Type	Lookup list	- <b>•</b>												

- In this example, the **Description** has been edited to include the text: "for Installation".
- When you have made the required changes, click on **Save**.

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۲	Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		Ø	×
H Save															
Pro	ess														^
		TR001	•												
	Description	Technician Required for Installatio	n*												
	Input Type	Lookup list	- •												

- You will return to the Edit Part screen.
- The **Code Description** has been updated in the User Defined panel.

**Reminder**: These custom elements are available to **all** part definitions in the **Add new part** and **Edit Part** screens. This update will reflect across **all** part definitions.



e Back Save Layout Wo	rkspaces	ntract Finance / HR	Inventory Maintenance / Projects	Manufa	cturing Procurement	Sales Service	Reporting Utilit	les	-	0
rocess Format				User De	fined				4	×
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inctions				Code	CodeDescription	VariableValu	e			
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ubstitutes	Tax Rate		<u> </u>	SH	Physical Location	OS				
		Retail - Office Supplies - Equipme	<u> </u>	IHI PCM	In-House Installation Paper Capacity Standard	No 1750				
	Weight			PCM	Paper Capacity Standard	1/50				
Documents	Volume									
	Unit of Measure Single Supplier									
	Single Supplier Shelf Life									
OMs	Shelf Life Period									
	Depreciation Method		-							
	Wear and Tear Method		*							
	Maintenance Craft		*							
	Manufacturer		9							
	Default Fee		*							
	Duty Cycle	1 0								
ocessing	Life Cycle	1 0								
ocessing										

#### **FREE INPUT TEXT**

- Right-click in the **row** of the custom field where you wish to make changes.
  - Ensure that you have selected a custom field that has
     Input Type: Free Input Text.
- A Process menu will pop up.
- Click on Edit Edit Custom Field.

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Save Back Save Layout	t Workspaces	ntract Finance / HR	Inventory Maintenance / Projects	Manufacturing	Procurement Sales	Service Reporti	ng Utilities	- 0	۰ ×
Links *	Part Code			User Defined	•			41	× M
		ASUUTT Sprint Multi Functional Copier		- OSCI Dennee	<u></u>				dtio
	p			Drag a column header l	here to group by that column				P al Da
Functions					CodeDescription	VariableValue			5
Items Supplied	Model No			Ψ # <u></u> [[		∎C.			5
	Part Type Taxable	A Class Part	-	TR001	Technician Required for Installation Paper Capacity Maximum	PST 5200			er De
	Tax Rate		* *	SH	Physical Location	OS Process			User Defined
		Retail - Office Supplies - Equipme	•	DHI	In-House Installation	No. = Add	New Custom Field		
	Weight			PCM	Paper Capacity Standard				
	Volume	10					Custom Field		
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	Single Supplier								
BOMs	Shelf Life								
DUNS	Shelf Life Period	Years	-						
	Depreciation Method		-						
Stock Control	Wear and Tear Method		*						
	Maintenance Craft Manufacturer		•						
	Default Fee		<u>~</u>						
	Duty Cycle	1 \$							
	Life Cycle	1 0							
Processing									
Requisitions									
Purchase Orders									



- The Add new custom element screen will open.
  - Even though the screen title is Add new custom element, you can edit the details from here.

#### **Edit Code**

• Click in this field and either add new text or remove text from the **Code**, as required.

### **Edit Description**

• Click in this field and either add new text or remove text from the **Description**, as required.

## Edit Input Type

In this exercise, the **Input Type** will be edited as an example.

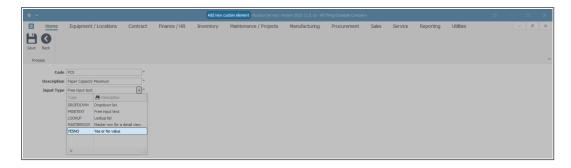
**Reminder**: This update will reflect across all part definitions.

• Click on the drop-down arrow in this field

Add new custom dement - Nucleus Service: Version 2023.11.0.10 - All Things Example Company													œ	- 0	×
۲	Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		- 0	×
H Save															
Proc	155														^
	Description	e PCS N Paper Capacity Maximum e Free input text	•												

- The Input Type menu will display.
- Select the alternative **Type** you wish to link to this custom field.





- The selected **Type** will populate the Input Type field.
- Click on Save.

Add new custom element - Nucleus Service: Version 2023.11.0.10 - All Things Example Company													
Back Equipment / Loc	ations Contract F	inance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities			Ø	×
Process													^
Code PCS Description Paper Capacity Maxim Input Type Yes or No value	* *												

- You will return to the Edit Part screen.
- You may need to click in the Variable Value field to 'refresh' the panel and display the changes.
- In this example, the field has updated to a check box, inherent of the Yes or No value Input Type.

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B Home Equipment /		ntract Finance / HR	Inventory	Maintenance / Projects	Mar	nufacturing	Procurement	Sales	Service	Reporting	Utilities		ø×
Save Back Save Layout Workspa													
~	ices												~
Process Format						Jser Defined	a					41	X &
LITIKS	Part Code					Ser Denned	u						diti
Enter text to search P	Description	Sprint Multi Functional Copier	· •			ag a column header	here to group by that	column					Q Ind
Functions						Code	CodeDescription		VariableValue				×3
	Model No	A500T			T	∎⊑c	n∏c		a 🛛 c				-
Items Supplied	Part Type	A Class Part	- *			TR001	Technician Required						lser D
	Taxable				1	PCS	Paper Capacity Maxi		1				Defin
Substitutes	Tax Rate		-			SH	Physical Location		OS				
Substitutes		Retail - Office Supplies - Equipme	* *			IHI PCM	In-House Installation Paper Capacity Stan		Yes 1750				
	Weight					PCM	Paper Capacity Start	uaru	1750				
Documents	Volume												
Columnity	Unit of Measure												
	Single Supplier												
BOMs	Shelf Life												
	Shelf Life Period	Years	-										
	ar and Tear Method		-										
Stock Control	Maintenance Craft		-										
	Manufacturer		Q										
	Default Fee		*										
	Duty Cycle	1 0											
	Life Cycle	1 \$											
Processing													
Requisitions													
Purchase Orders													



• Click away from the Variable Value field to prompt the system to display the **Yes** or **No** value in text form.

Note: This Input Type is not applicable to the linked custom fields but is for **demonstration** purposes only to show how the **Input Type** can be edited.

• •							
Back Save Layout Work		ntract Finance / HR	Inventory Maintenance / Projects	Manufacturin	g Procurement Sales	Service Reporting	1 Utilities – $\sigma$ X
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Enter text to search P		Sprint Multi Functional Copier	· •	Drag a column header	here to group by that column		
Functions				Code		VariableValue	000
	Model No	A500T		T ADC	(Cc	a[]c	
Items Supplied	Part Type	A Class Part	- •	TR001	Technician Required for Installation	PST	
	Taxable	¥		<ul> <li>PCS</li> </ul>	Paper Capacity Maximum	Yes	
	Tax Rate		- *	SH	Physical Location	OS	
		Retail - Office Supplies - Equipme	- *	DHI	In-House Installation	No	
	Weight			PCM	Paper Capacity Standard	1750	
Documents	Volume						
Documents	Unit of Measure						
	Single Supplier						
BOMs	Shelf Life						
	Shelf Life Period	Years	-				
	Depreciation Method		-				
Stock Control	Wear and Tear Method		•				
	Maintenance Craft		•				
	Manufacturer Default Fee		<u>~</u>				
	Duty Cycle	1 ‡					
	Life Cycle	1 \$					
Processing	Life Cycle	1 v					
Requisitions Purchase Orders							

## YES OR NO VALUE

- Right-click in the **row** of the custom field where you wish to make changes.
  - ° Ensure that you have selected a custom field that has

**Input Type**: Yes or No value.

- A Process menu will pop up.
- Click on Edit Edit Custom Field.



Nome       Equipment / Locations       Contact       France / HR       Inventory       Mantenance / Projects       Manufacturing       Procurement       Sales       Service       Reporting       Utilities         Ever       Service       Service       No       Service       Reporting       Utilities         Process       Femal       Bescription       Service       Reporting       Utilities         Ever       Service       Service       Reporting       Utilities         Finance/mile       Pert Code       Montfill       Montfill       Service       Reporting       Utilities         Finance/mile       Pert Code       Montfill       Montfill       Montfill       Montfill       Pert Prove       Pert Prove       Reporting       Versiderials       Pert Prove       Pert Prove       Reporting       Versiderials       Pert Prove       Report Code       Versiderials       Pert Prove       Report Code       Pert Prove       Report Code       Versiderials       Pert Prove       Report Code       Pert Prove </th <th></th>	
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- The Add new custom element screen will open.
  - Even though the screen title is Add new custom element, you can edit the details from here.

#### **Edit Code**

• Click in this field and either add new text or remove text from the **Code**, as required.

## **Edit Description**

• Click in this field and either add new text or remove text from the **Description**, as required.

## Edit Input Type

• You can click on the **drop-down arrow** in this field and select an alternative Input Type if required.





- In this example, the **Code** has been edited to: "I-H-I".
- When you have made the required changes, click on **Save**.

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	Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		ø	×
H	0														
Save	Back														
Proc	ess														^
	Code	[1+H-I]	•												
	Description	In-House Installation	•												
	Input Type	Yes or No value													
Proc	Code Description	In-House Installation	*												

- Your changes will be saved and you will return to the **Edit Part** screen.
- If the User Defined panel is not already extended, click on the tab. to view the above edits.

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🕘 Home Equip	oment / Locations Co	intract Finance / HR	Inventory	Maintenance / Projects	Manufacturin	g Procurement S	ales Service	Reporting L	Jtilties	- C	9 X
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	Taxable				PCS	Paper Capacity Maximum	5200				Defin
Substitutes	Tax Rate		-		SH	Physical Location	OS				<u>a</u>
		Retail - Office Supplies - Equipme	* *		> I-H-I PCM	In-House Installation Paper Capacity Standard	No 1750				
	Weight				(PCM	Paper Capacity Standard	1/30				
Documents	Volume Unit of Measure										
	Single Supplier										
	Shelf Life										
BOMs	Shelf Life Period		-								
	Depreciation Method		*								
	Wear and Tear Method		*								
	Maintenance Craft		*								
	Manufacturer		P								
	Default Fee		*								
	Duty Cycle										
Processing	Life Cycle	1 0									
Purchase Orders											



## CONCLUSION

Where the custom field Input Type is **Lookup List**, it is only possible to edit the **Code Description** of the custom field.

Where the custom field Input Type is either **Free Input Text** or **Yes or No value**, it is possible to edit the **Code**, **Description** and **Input Type** of the custom field.

#### **Related Topics**

- Edit Part Definition Details
- Edit Part Definition Defaults
- Edit Part Definition BOM Allocation
- Edit Part Definition Part Meters
- Edit Part Definition Yield Config
- Edit Part Definition Additional Data

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