

EQUIPMENT

ASSETS – EDIT – USER DEFINED

A **User Defined** panel has been added to the Asset Maintain screen (the *Equipment Maintenance for Serial No: []* screen).

At present, these fields in the Equipment - Assets module can be used to add extra information relevant to the selected asset. The added fields will reflect in the User Defined panel in the Asset Maintain screen across *all* assets on the system, but the **Variable Values** selected for each User Defined field will be unique to the selected asset.

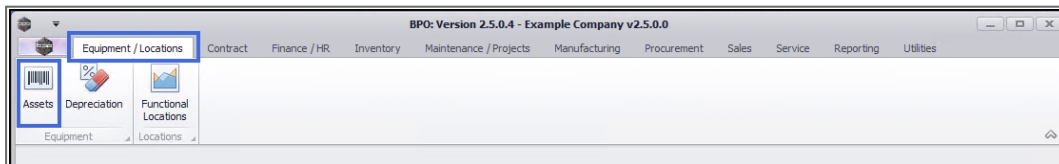
This information will also reflect in the *Call Maintain* screen where the asset is linked. Although the fields can be *viewed* from the *Call Maintain* screen, the actual information can only be **edited** in the *Asset Maintain* screen.

This topic will expand on how to **edit** the User Defined custom fields for a selected asset. Not all custom fields can be edited in the same way, it depends on what Input Type they have been set up with.



Note: It will be useful to familiarise yourself with the [Add Asset User Defined](#) topic before progressing with this manual.

Ribbon Access: *Equipment and Locations* > *Assets*



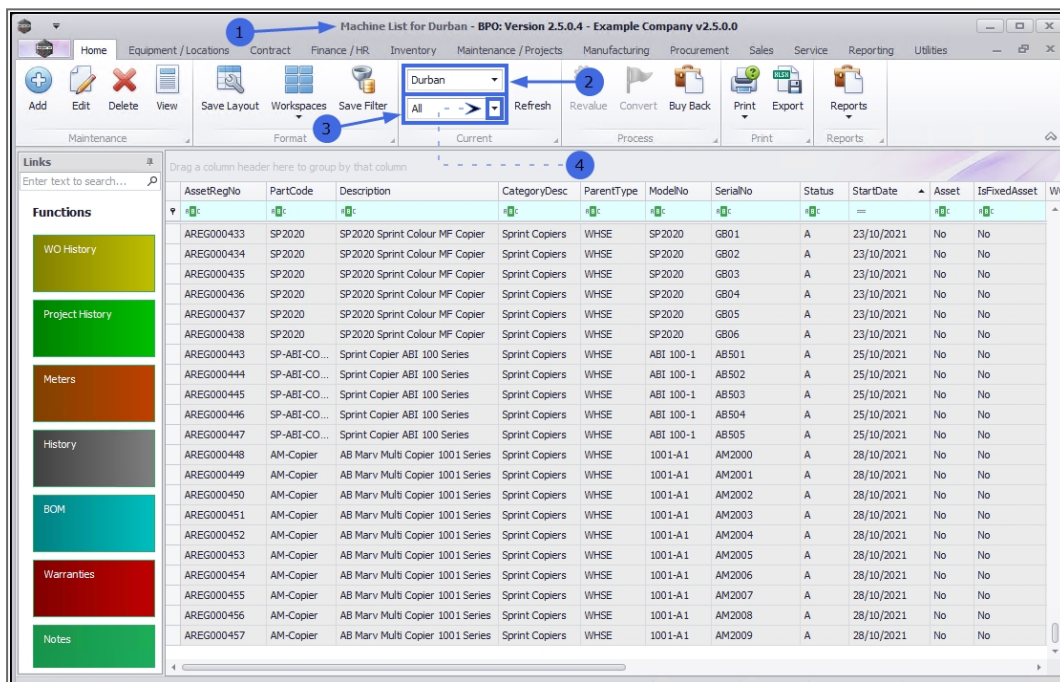
1. The **Machine List for []** screen will display.

THE SITE AND TYPE FILTERS

- The screen will open with the default **Site** setting configured on the user.

Note: Refer to [Site Selection](#) for more information.

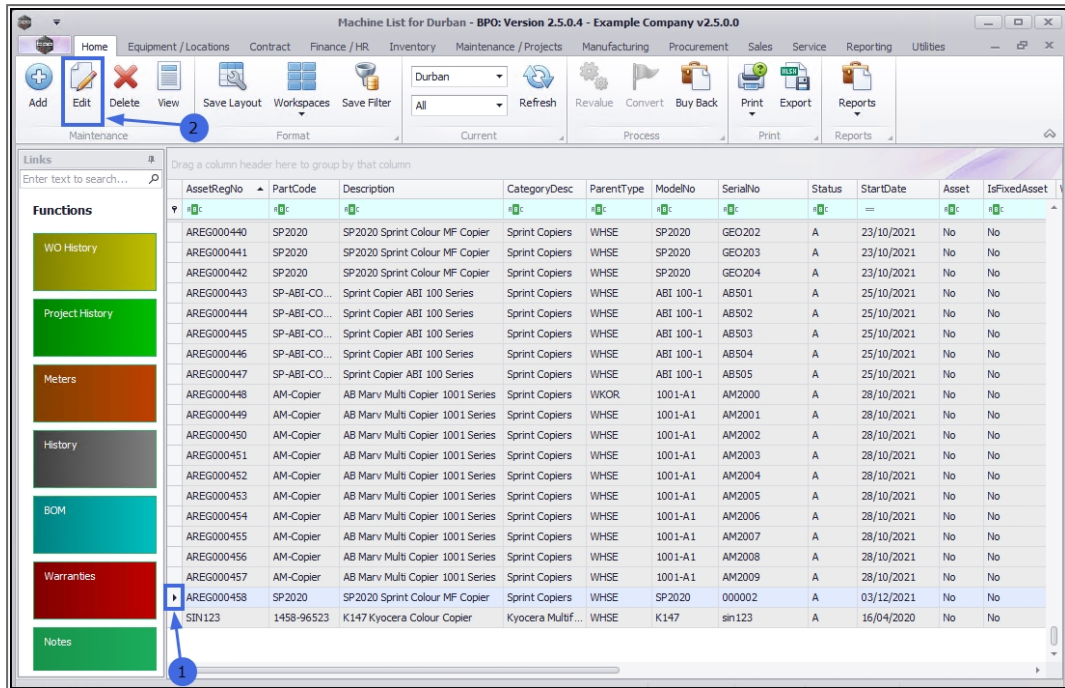
- By default, this screen will open with the **Type** filter set to '**All**', listing all of the assets on the system (Customer Assets, Internal Assets and Serialised Stock items).
- You can click on the **drop-down arrow** in the Type field and select an **alternative Type**, (such as Client Machines), if required.



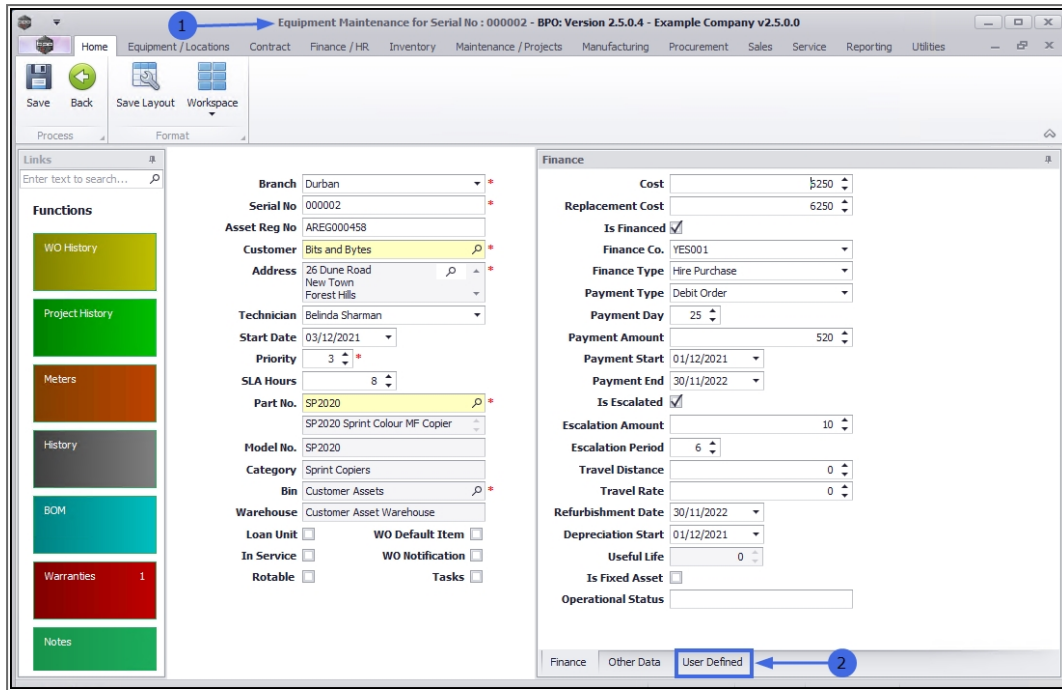
SELECT THE ASSET

- Select the **row** of the asset where you wish to edit the *User Defined* custom fields.

2. Click on **Edit**.



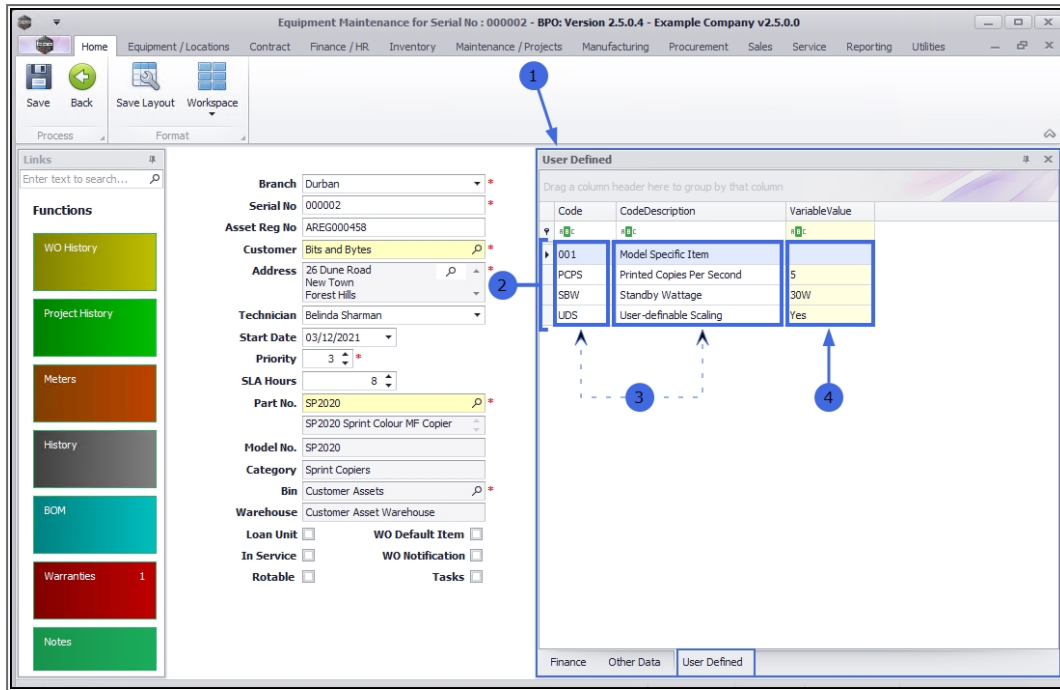
1. The **Equipment Maintenance for Serial No: []** screen will open.
2. If the **User Defined** field is not yet extended, click on the **User Defined** tab.



1. The **User Defined** panel will open.
2. In this example, there are *custom fields* already set up in the system.
3. The **Code** and **Code Description** fields will reflect across all assets.
4. The data *entered* or *added* to the **Variable Value** field is unique to the selected asset and will not reflect in any other asset 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.



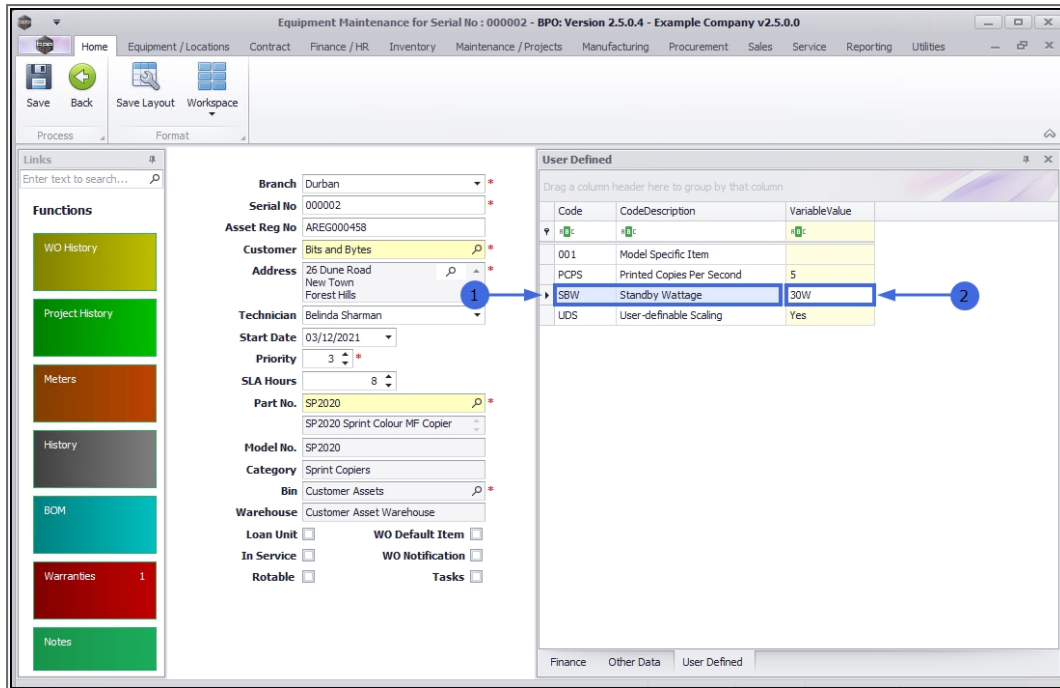
Although the data *selected* or *entered* into the **Variable Value** field is unique to the selected asset, the **Input Type** set up in the **Variable Value** field will reflect across *all* assets.

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

EDIT VARIABLE VALUES

LOOKUP LIST

1. In this example, the **SBW** - *Standby Wattage* User Defined field has a **Lookup list** as the Input Type.
2. Currently, the Variable Value is **30W** - *Thirty Watts*.



Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspace

Process Format

Links
Enter text to search...

Functions

- WO History
- Project History
- Meters
- History
- BOM
- Warranties 1
- Notes

Branch: Durban

Serial No: 000002

Asset Reg No: AREG000458

Customer: Bits and Bytes

Address: 26 Dune Road, New Town, Forest Hills

Technician: Belinda Sharman

Start Date: 03/12/2021

Priority: 3

SLA Hours: 8

Part No: SP2020

Model No: SP2020

Category: Sprint Copiers

Bin: Customer Assets

Warehouse: Customer Asset Warehouse

Loan Unit: ☐ WO Default Item: ☐

In Service: ☐ WO Notification: ☐

Rotable: ☐ Tasks: ☐

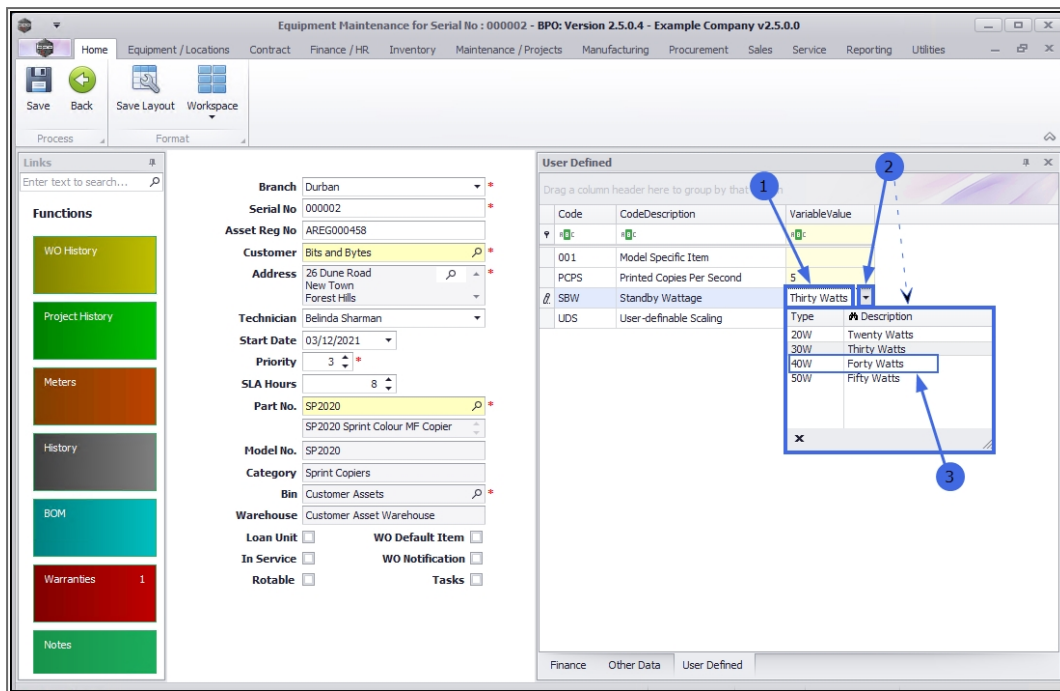
User Defined

Drag a column header here to group by that column

Code	CodeDescription	Variable/Value
001	Model Specific Item	
PCPS	Printed Copies Per Second	5
SBW	Standby Wattage	30W
UDS	User-definable Scaling	Yes

Finance Other Data User Defined

1. Click in the **Variable Value** field.
2. A drop-down arrow and list will appear - this is a **Lookup List** Input Type.
3. Select the **row** of the alternative Type you wish to link to this custom field.
 - In this example, **40W** - *Forty Watts* is selected.



Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspace

Process Format

Links
Enter text to search...

Functions

- WO History
- Project History
- Meters
- History
- BOM
- Warranties 1
- Notes

Branch: Durban

Serial No: 000002

Asset Reg No: AREG000458

Customer: Bits and Bytes

Address: 26 Dune Road, New Town, Forest Hills

Technician: Belinda Sharman

Start Date: 03/12/2021

Priority: 3

SLA Hours: 8

Part No: SP2020

Model No: SP2020

Category: Sprint Copiers

Bin: Customer Assets

Warehouse: Customer Asset Warehouse

Loan Unit: ☐ WO Default Item: ☐

In Service: ☐ WO Notification: ☐

Rotable: ☐ Tasks: ☐

User Defined

Drag a column header here to group by that

Code	CodeDescription	VariableValue
001	Model Specific Item	
PCPS	Printed Copies Per Second	5
SBW	Standby Wattage	Thirty Watts
UDS	User-definable Scaling	

Type: Description:

20W Twenty Watts

30W Thirty Watts

40W Forty Watts

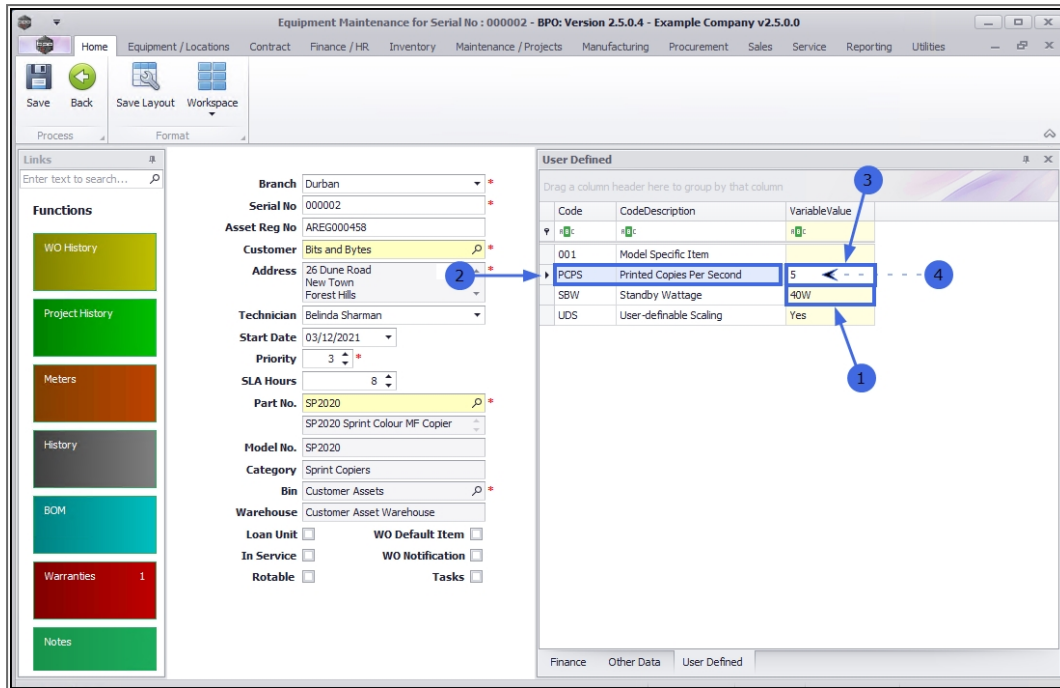
50W Fifty Watts

Finance Other Data User Defined

1. The edited selection will populate the **Variable Value** field.

FREE INPUT TEXT

2. In the next example, the **PCPS - Printed Copies Per Second** User Defined field has **Free Input Text** as the Input Type.
3. Currently, the Variable Value is **5**.
4. 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.



1. The edited text will populate the **Variable Value** field.

YES OR NO VALUE

2. In the next example, the **UDS - User definable Scaling** User Defined field has **Yes or No value** as the Input Type.
3. Currently, the Variable Value is **Yes**.
4. Click in the Variable Value field.

Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspace

Process | Format

Links
Enter text to search...

Functions
WO History
Project History
Meters
History
BOM
Warranties 1
Notes

Branch: Durban
Serial No: 000002
Asset Reg No: AREG000458
Customer: Bits and Bytes
Address: 26 Dune Road, New Town, Forest Hills
Technician: Belinda Sharman
Start Date: 03/12/2021
Priority: 3
SLA Hours: 8
Part No: SP2020
Model No: SP2020
Category: Sprint Copiers
Bin: Customer Assets
Warehouse: Customer Asset Warehouse
Loan Unit: ☐ WO Default Item: ☐
In Service: ☐ WO Notification: ☐
Rotable: ☐ Tasks: ☐

User Defined
Drag a column header here to group by that column

Code	CodeDescription	Variable/Value
001	Model Specific Item	Yes
PCPS	Printed Copies Per Second	4
SBW	Standby Wattage	40W
UDS	User-definable Scaling	Yes

Finance | Other Data | User Defined

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

Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspace

Process | Format

Links
Enter text to search...

Functions
WO History
Project History
Meters
History
BOM
Warranties 1
Notes

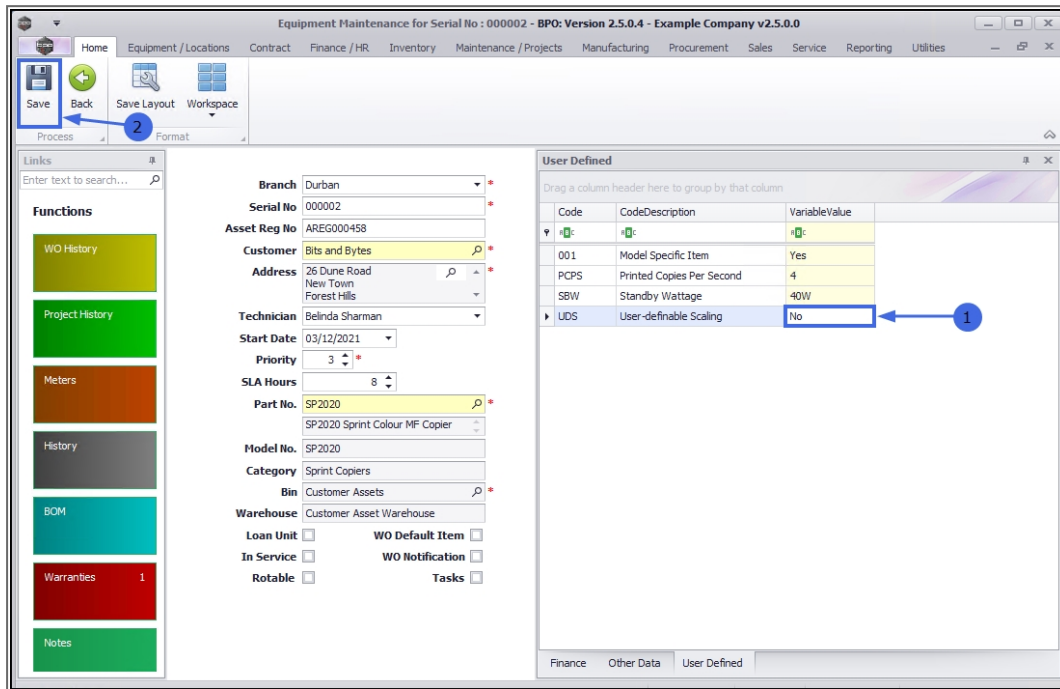
Branch: Durban
Serial No: 000002
Asset Reg No: AREG000458
Customer: Bits and Bytes
Address: 26 Dune Road, New Town, Forest Hills
Technician: Belinda Sharman
Start Date: 03/12/2021
Priority: 3
SLA Hours: 8
Part No: SP2020
Model No: SP2020
Category: Sprint Copiers
Bin: Customer Assets
Warehouse: Customer Asset Warehouse
Loan Unit: ☐ WO Default Item: ☐
In Service: ☐ WO Notification: ☐
Rotable: ☐ Tasks: ☐

User Defined
Drag a column header here to group by that column

Code	CodeDescription	Variable/Value
001	Model Specific Item	Yes
PCPS	Printed Copies Per Second	4
SBW	Standby Wattage	40W
UDS	User-definable Scaling	☐

Finance | Other Data | User Defined

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



The screenshot shows the 'Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0' window. The 'User Defined' tab is active, displaying a table with columns: Code, CodeDescription, and VariableValue. The table contains the following data:

Code	CodeDescription	VariableValue
001	Model Specific Item	Yes
PCPS	Printed Copies Per Second	4
SBW	Standby Wattage	40W
UDS	User-definable Scaling	No

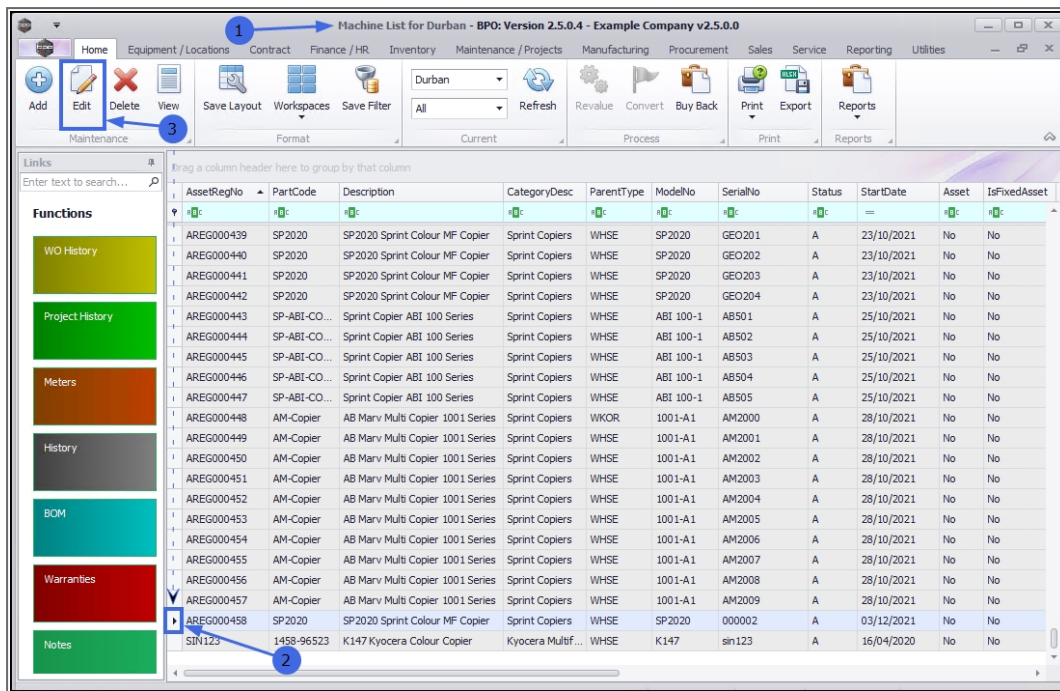
A blue circle with the number '1' points to the 'No' value in the 'VariableValue' column for the 'UDS' row. Another blue circle with the number '2' points to the 'Save' button in the top left corner of the window.

1. Your changes will be saved and you will return to the **Machine List for []** screen.
2. The edited asset will be selected in the data grid.

EDIT CUSTOM FIELDS

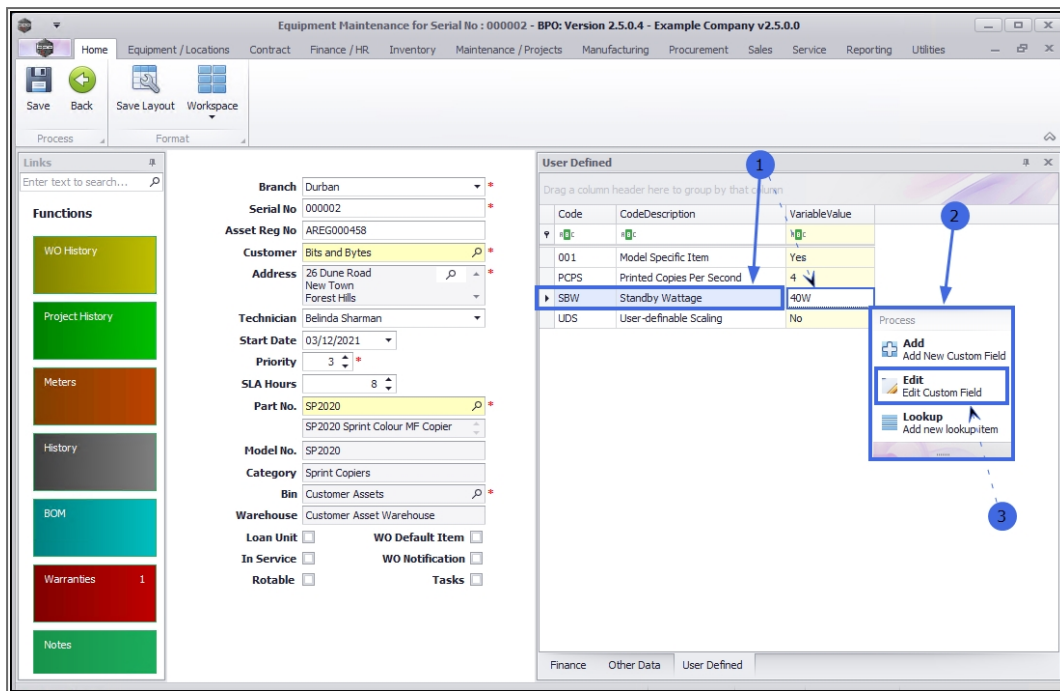
Follow the processes set out below to edit the **custom fields**.

3. Select the asset where you wish to make changes to a custom field and click on **Edit**.



LOOKUP LIST

1. 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: Lookup List**.
2. A **Process** menu will pop up.
3. Click on **Edit - Edit Custom Field**.



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

Edit Code

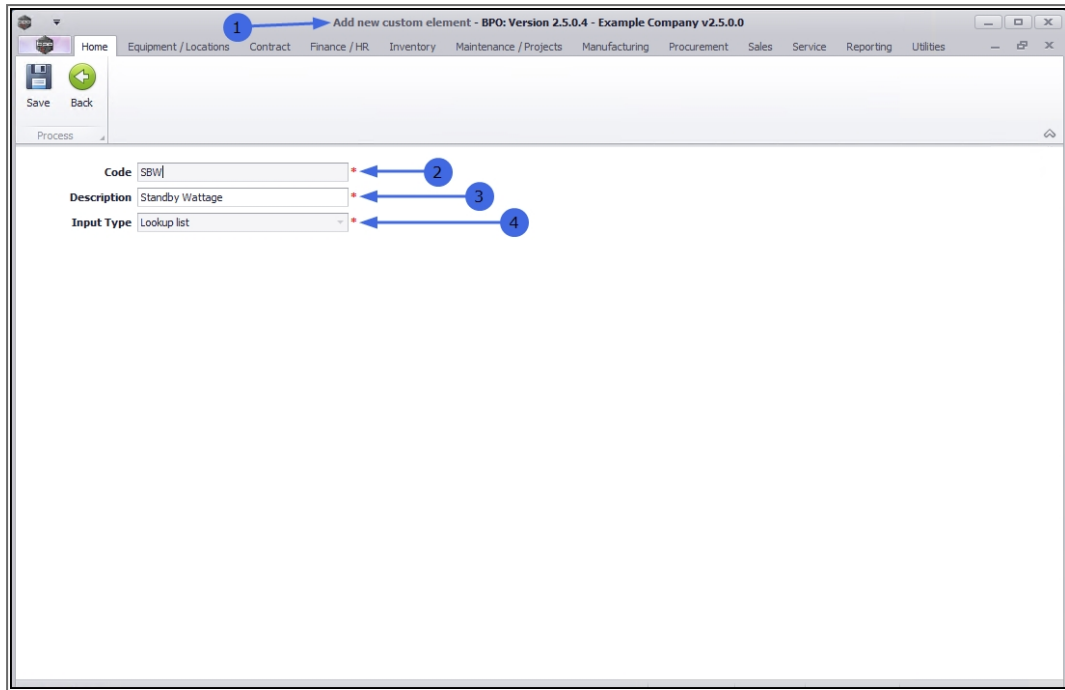
2. This field is greyed out, it is not possible to edit the **Code** from this screen.

Edit Description

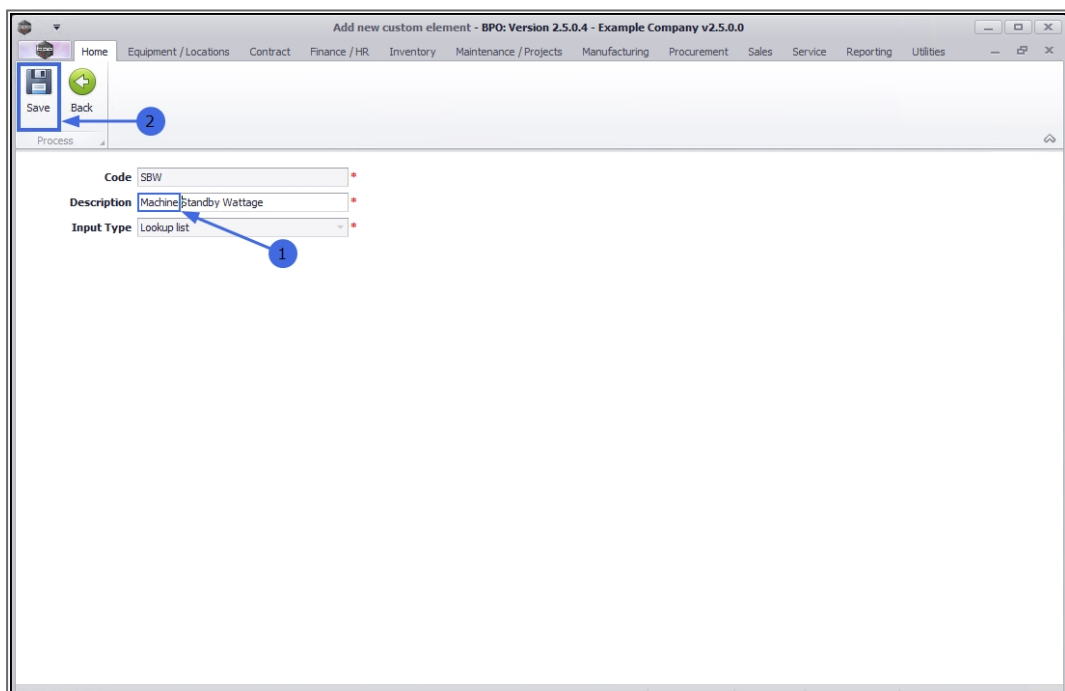
3. Click in this field and either *add* new text or *remove* text from the **Description**, as required.

Edit Input Type

4. This field is greyed out, it is not possible to edit the **Input Type: Lookup List** from this screen.

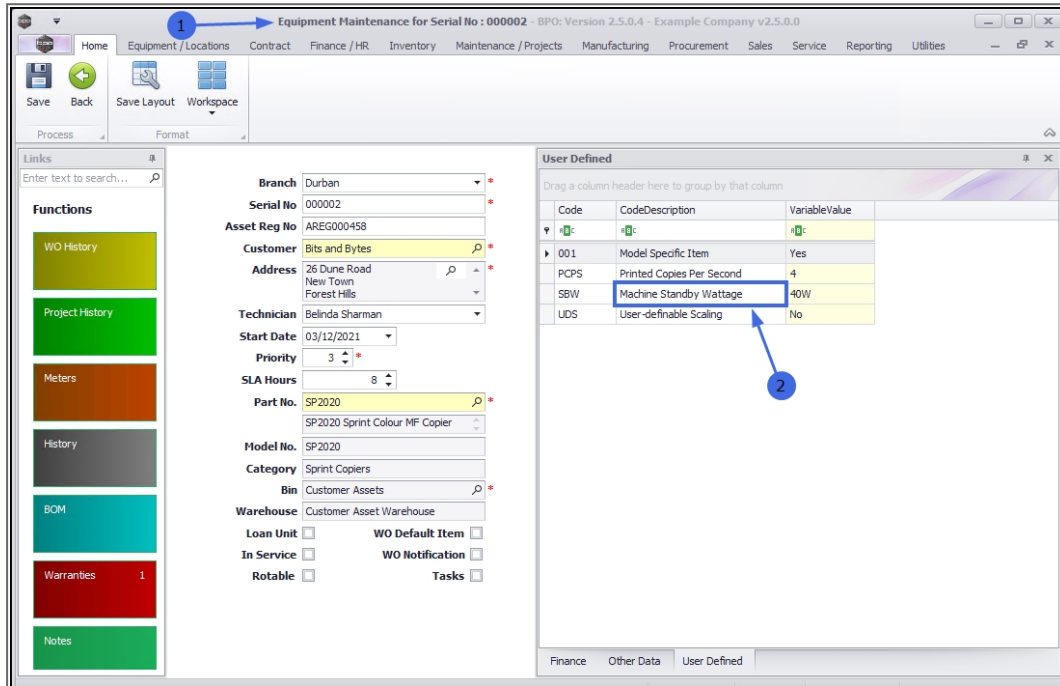


1. In this example, the **Description** has been edited to include the text: "Machine".
2. When you have made the required changes, click on **Save**.



1. You will return to the **Equipment Maintenance for Serial No: []** screen.
2. The **Code Description** has been updated in the User Defined panel.

Reminder: These custom elements are available to *all* assets in the **New Equipment** and **Equipment Maintenance** screens. This update will reflect across *all* assets.



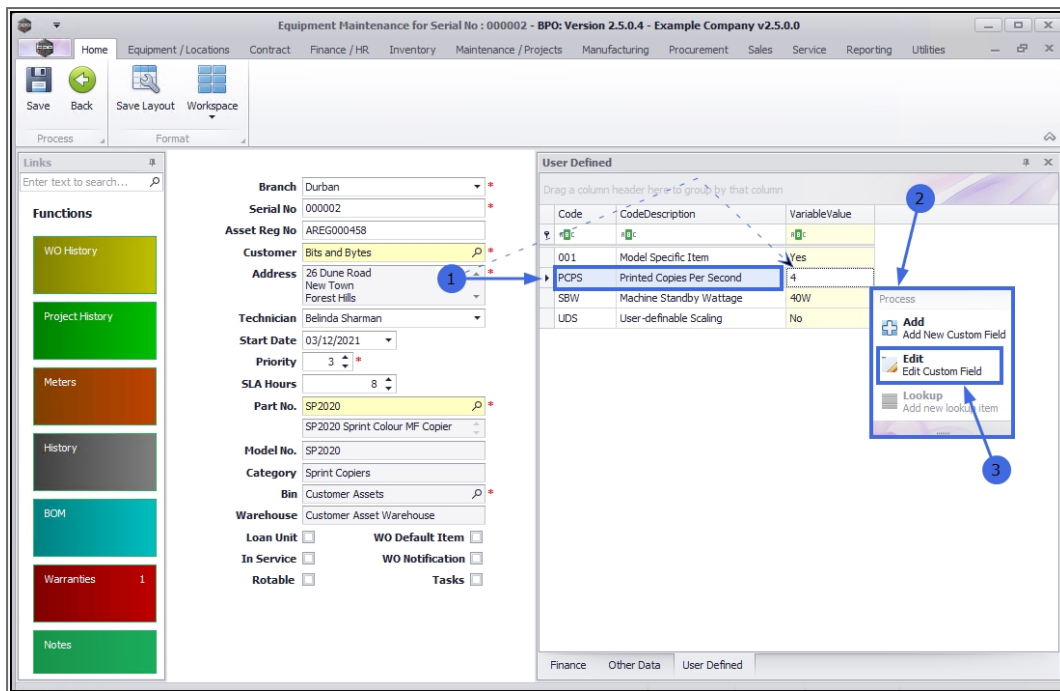
Equipment Maintenance for Serial No : 000002 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Branch: Durban
 Serial No: 000002
 Asset Reg No: AREG000458
 Customer: Bits and Bytes
 Address: 26 Dune Road, New Town, Forest Hills
 Technician: Belinda Sharman
 Start Date: 03/12/2021
 Priority: 3
 SLA Hours: 8
 Part No: SP2020
 Model No: SP2020
 Category: Sprint Copiers
 Bin: Customer Assets
 Warehouse: Customer Asset Warehouse
 Loan Unit: ☐ WO Default Item: ☐
 In Service: ☐ WO Notification: ☐
 Rotable: ☐ Tasks: ☐

Code	CodeDescription	VariableValue
001	Model Specific Item	Yes
PCPS	Printed Copies Per Second	4
SBW	Machine Standby Wattage	40W
UDS	User-definable Scaling	No

FREE INPUT TEXT

1. 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**.
2. A **Process** menu will pop up.
3. Click on **Edit - Edit Custom Field**.



1. 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

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

Edit Description

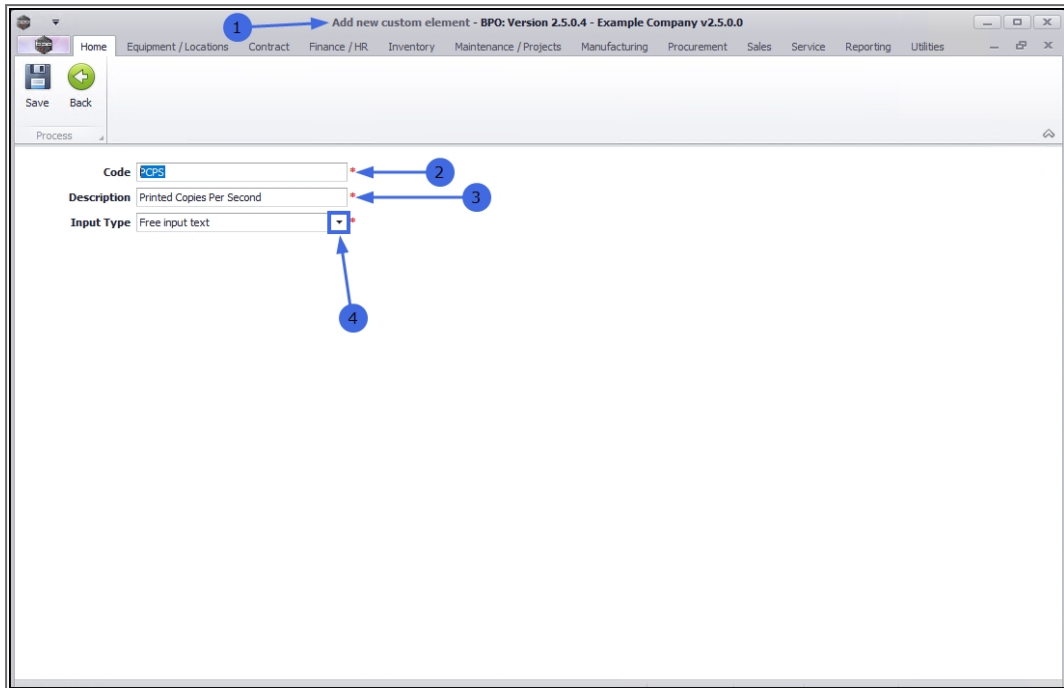
3. Click in this field and either *add* new text or *remove* text from the **Description**, as required.

Edit Input Type

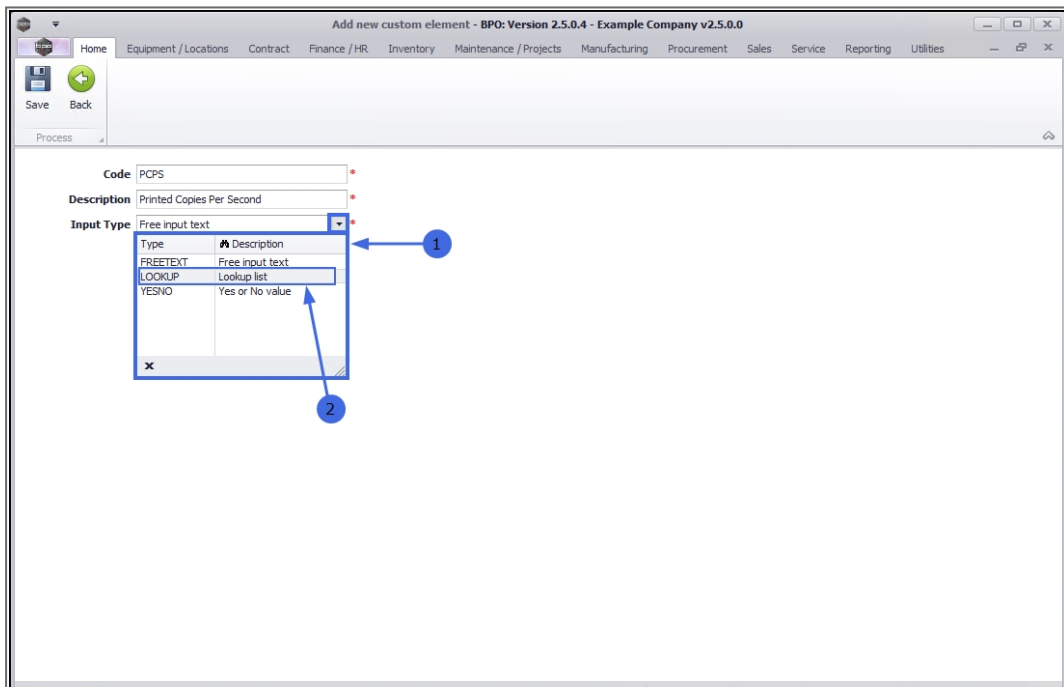
In this exercise, the **Input Type** will be edited as an example.

Reminder: This update will reflect across *all* assets.

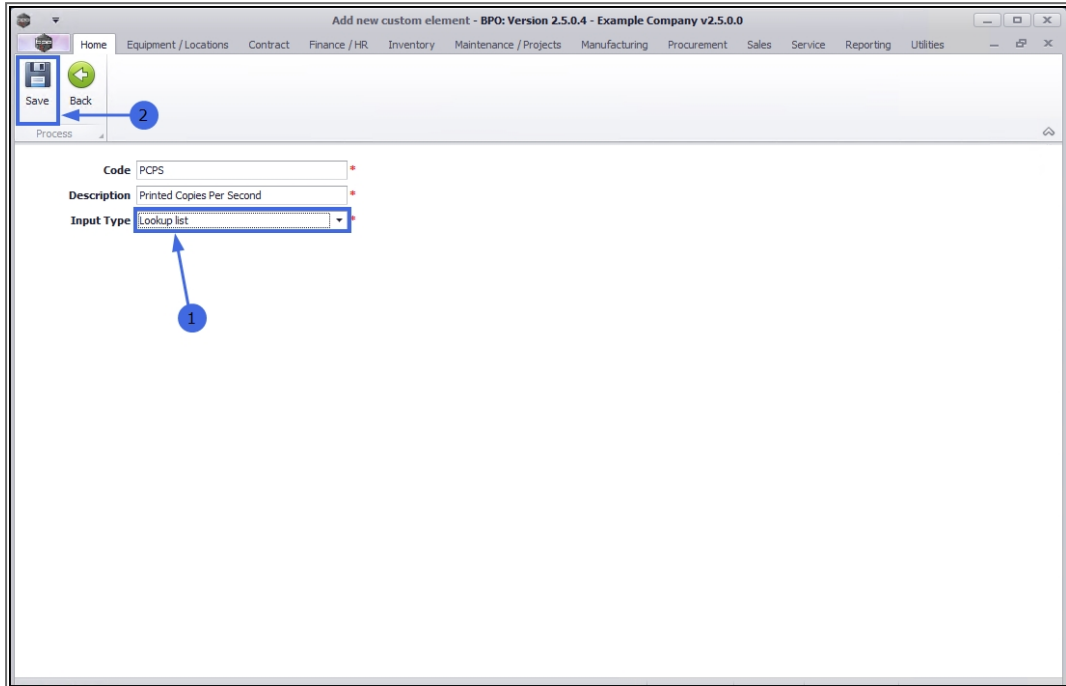
4. Click on the **drop-down arrow** in this field



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



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



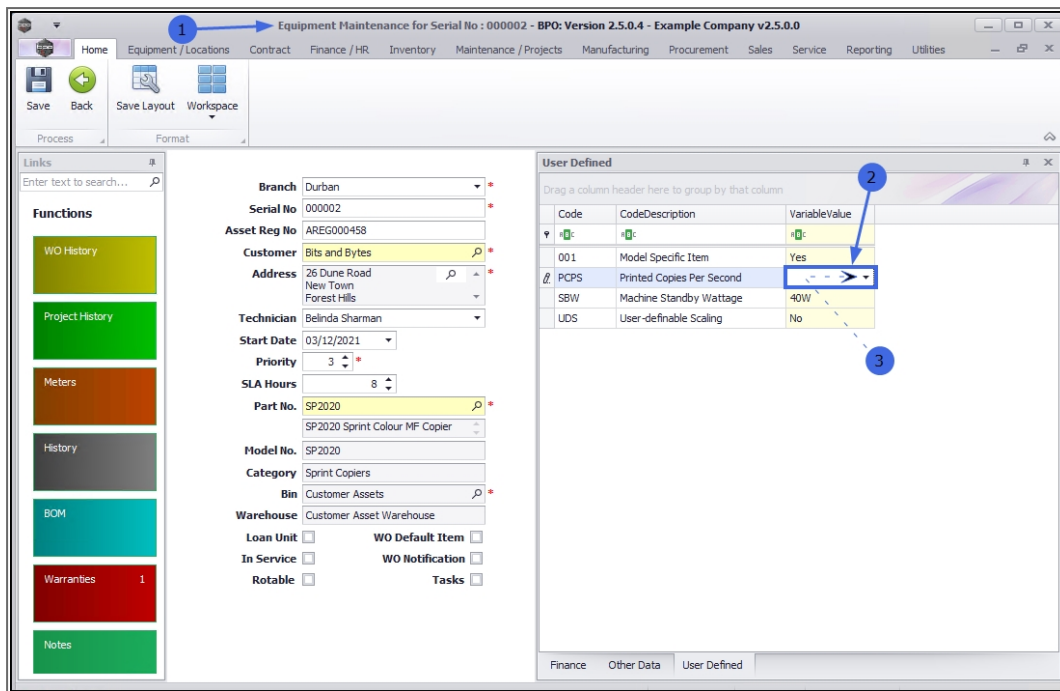
1. You will return to the **Equipment Maintenance for Serial No:** screen.
2. You may need to click in the Variable Value field to *refresh* the panel and display the changes
3. In this example, the field has updated to display a **drop-down arrow**, inherent of the **Lookup list** Input Type.



Note 1: For this list to display any data , follow the process to [add Lookup fields](#) to this custom element.

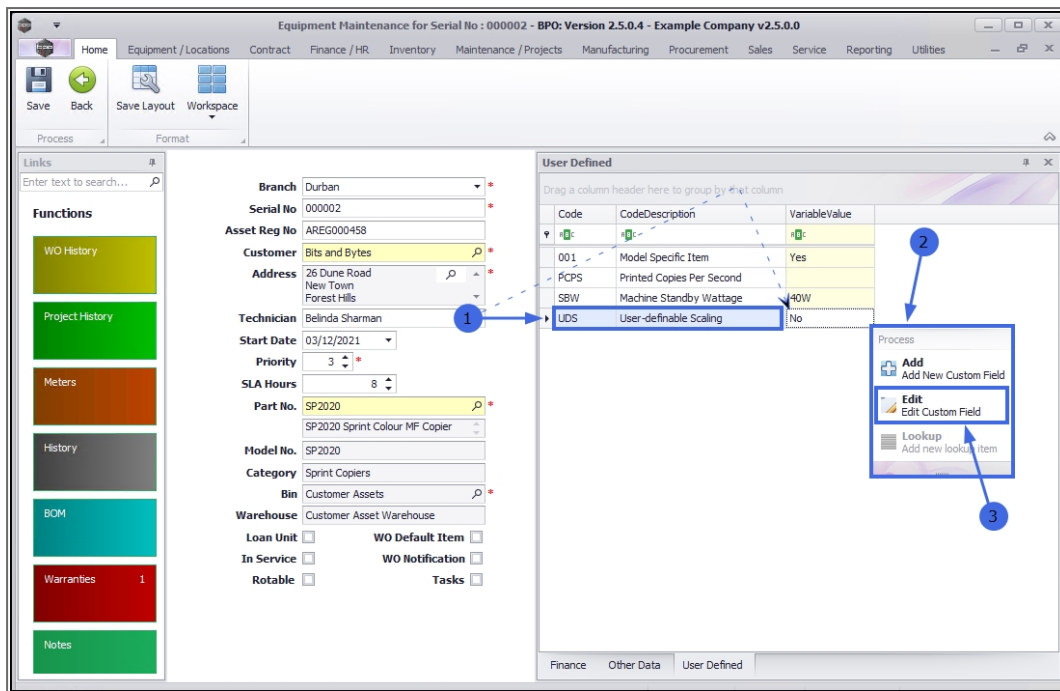


Note 2: This Input Type is not necessarily applicable to the linked custom field but is for **demonstration** purposes only to show how the **Input Type** can be edited.



YES OR NO VALUE

1. 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**.
2. A **Process** menu will pop up.
3. Click on **Edit - Edit Custom Field**.



1. 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

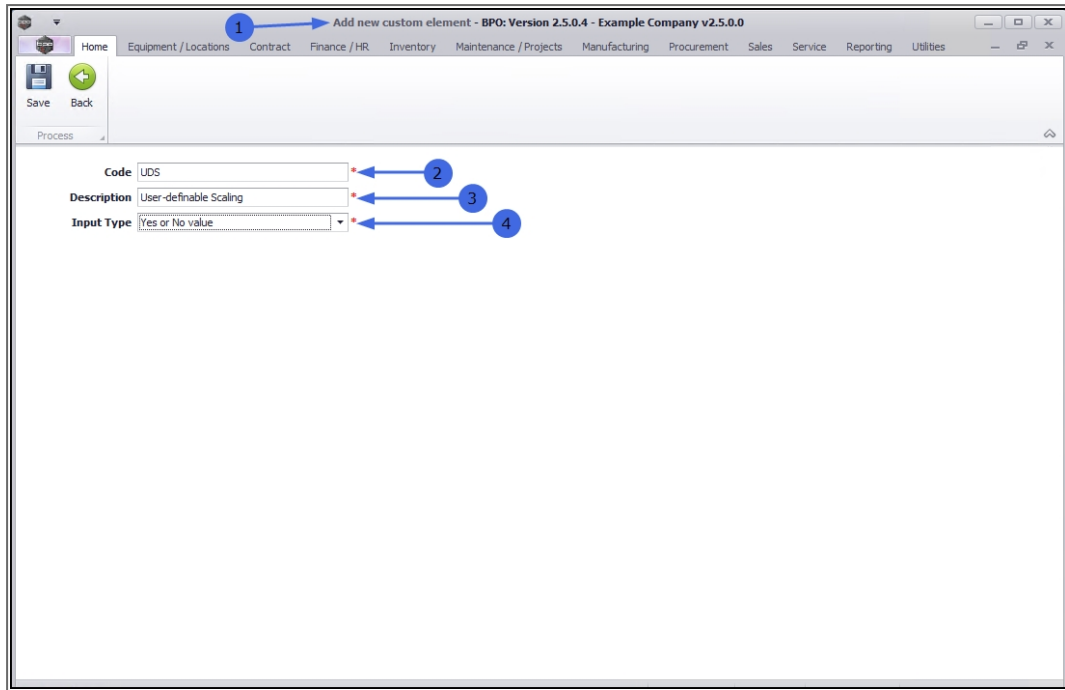
2. Click in this field and either *add* new text or *remove* text from the **Code**, as required.

Edit Description

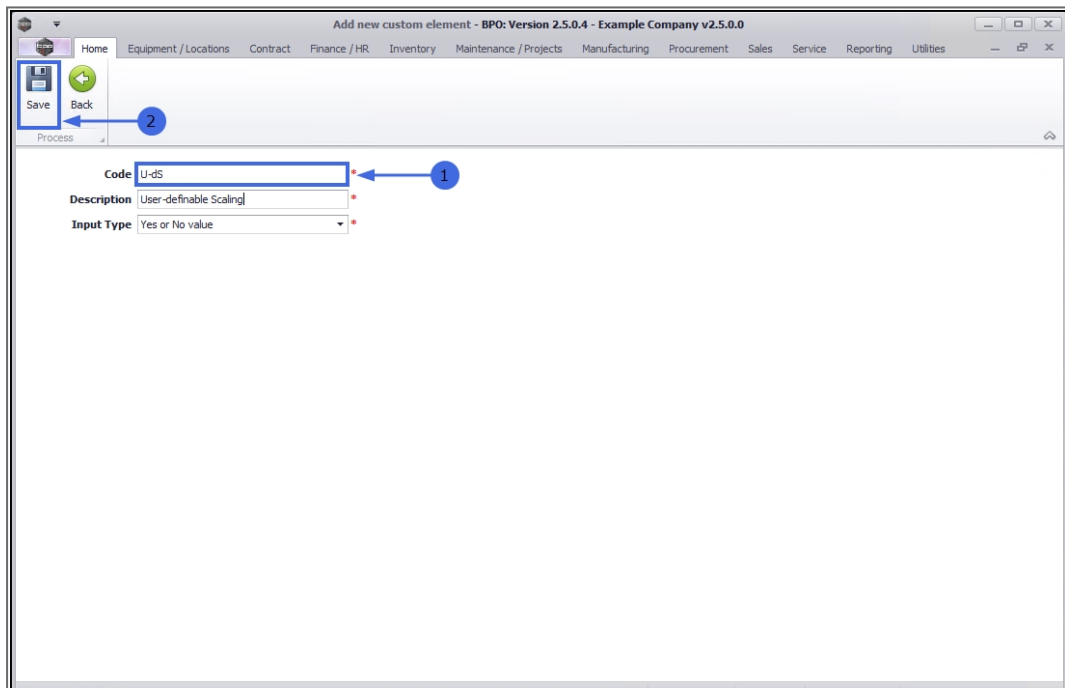
3. Click in this field and either *add* new text or *remove* text from the **Description**, as required.

Edit Input Type

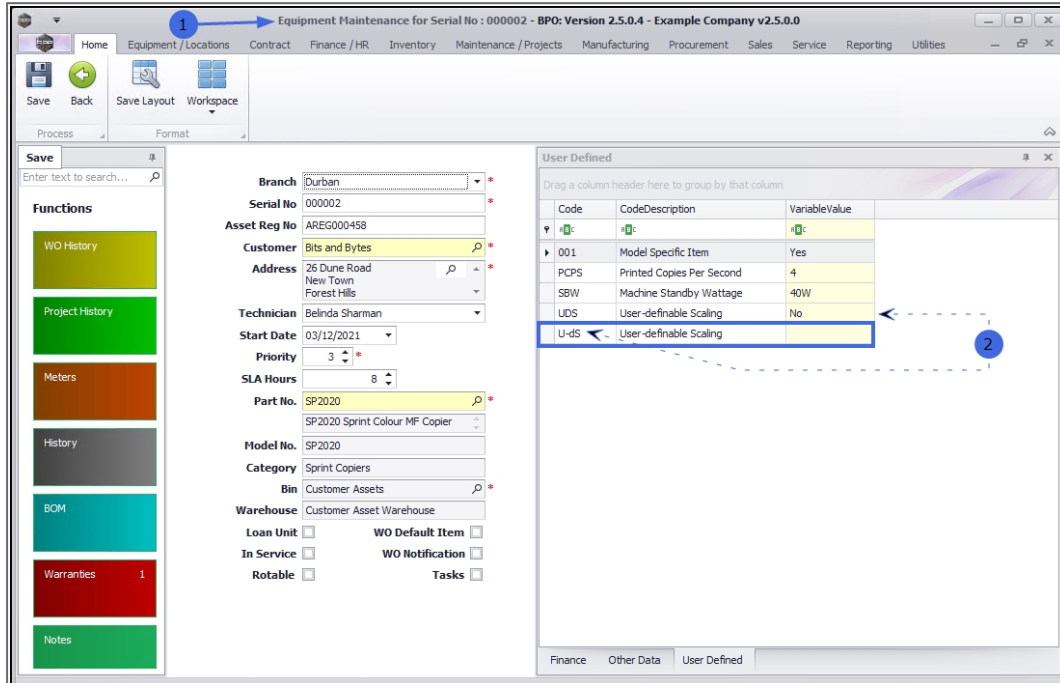
4. You can click on the **drop-down arrow** in this field and select an alternative Input Type if required.



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



1. Your changes will be saved and you will return to the **Equipment Maintenance for Serial No: []** screen.
2. Note that editing the **Code** of the custom field has resulted in a **new** custom field being created.



CONCLUSION

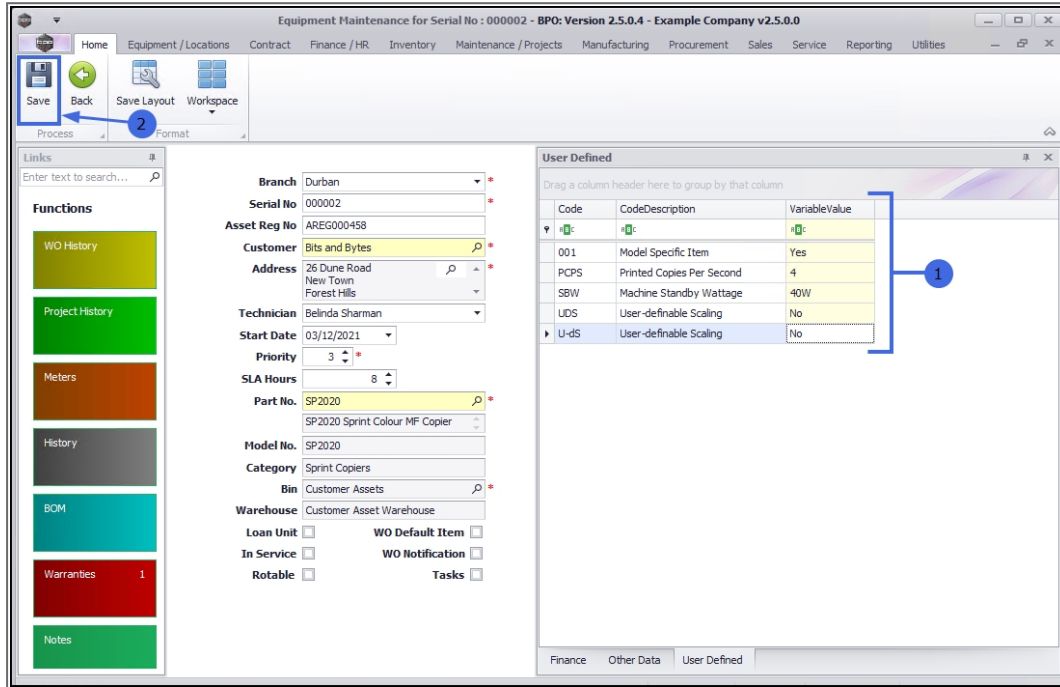
Where the custom field *Input Type* is **Lookup List**, it is only possible to edit the **Code Description** of the custom field

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

- However, if the **Code** is edited in either of these custom fields (**Free Input Text** or **Yes or No value**) then a **new** custom field will be created.

SAVE EDITED CUSTOM FIELDS

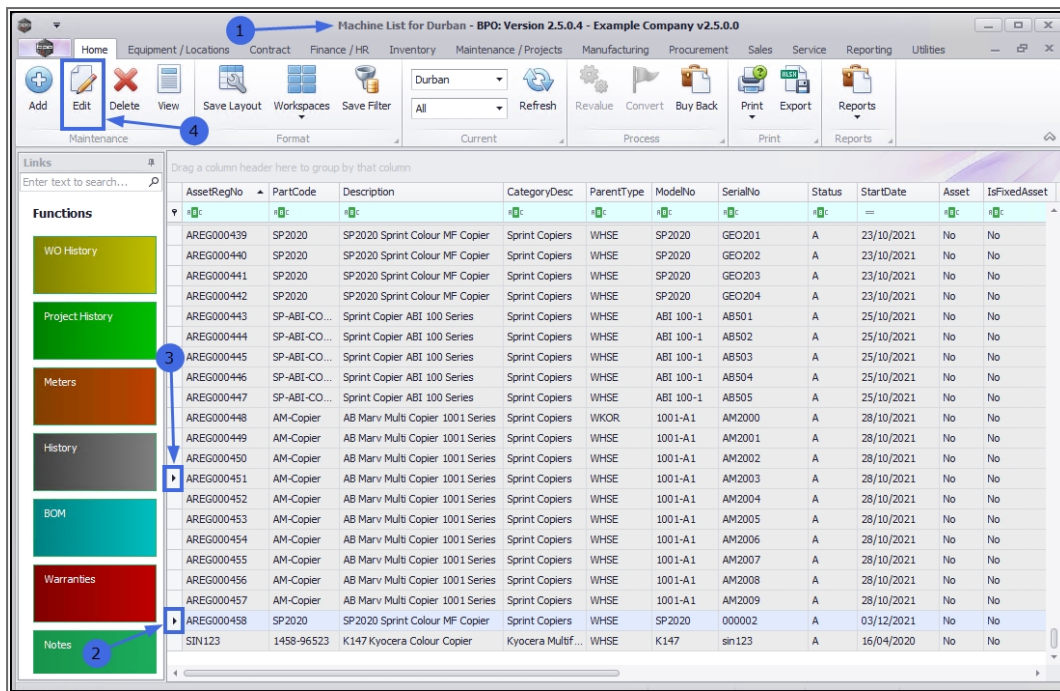
1. When you have finished making changes to the User Defined fields, as required,
2. Click on **Save**.



1. You will return to the **Machine List for []** screen.
2. The edited asset will be selected.

VIEW EDITED CUSTOM FIELDS NOW LINKED TO ALL ASSETS

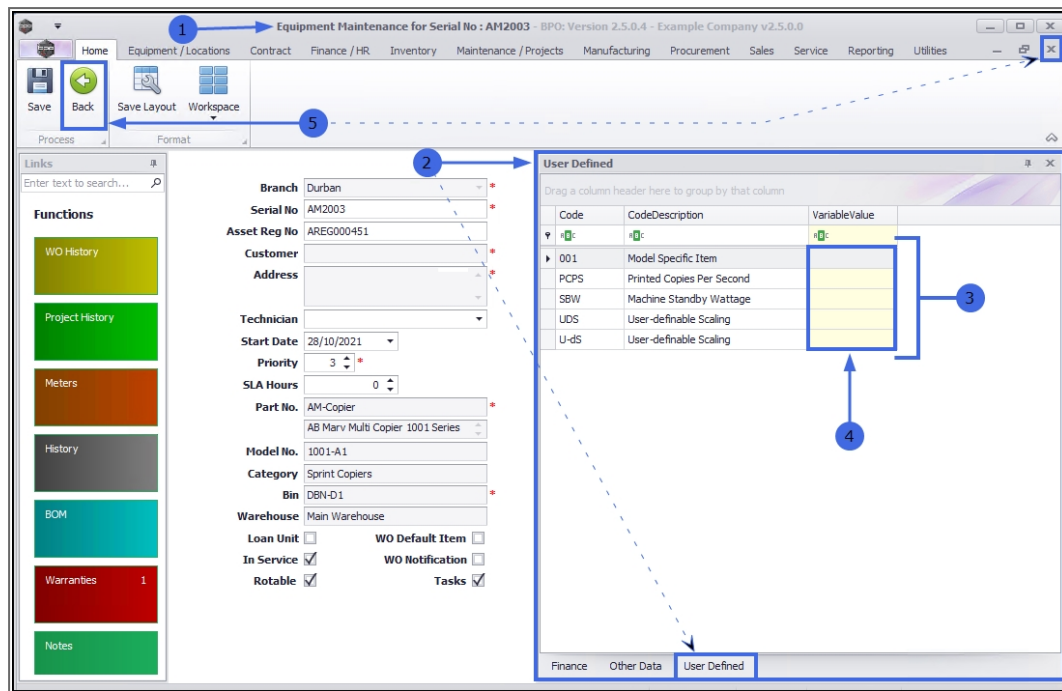
3. Select the **row** of a *different* asset in the data grid.
4. Click on **Edit**.



1. The **Equipment Maintenance for Serial No: []** screen will open.
2. If not already extended, click on the **User Defined tab** to open the panel.
3. The changes made to the custom elements of the *previous asset* are now available to *this* asset.
4. Note that the **Variable Value** column is not populated.

Reminder: The data added to this Variable Value field is unique to the selected asset and will not reflect in any other asset or other module User Defined fields.

5. Click on **Back** or **Close** the screen to return to the Part Listing screen.



VIEW USER DEFINED FIELDS IN CALL MAINTAIN SCREEN

The custom elements edited in this process will also reflect in the **Call Maintain** screen where this asset is linked to a Call. Either a *new* Call or an *existing* Call will have these new details available in the **Calls User Defined** panel.

Follow the process to navigate to the Call Maintenance screen and [view the Used Defined panel](#) with the updated custom fields.

Related Topics

- [Assets - Edit - Asset Details](#)
- [Assets - Edit - Finance Details](#)
- [Assets - Edit - Other Data](#)
- [Assets - Edit - User Defined](#)

MNU.007.016