



User Defined Fields User Guide



Creating and managing custom fields and page layouts

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Overview

User Defined Fields (UDFs) allow you to create unique fields and page layouts for the Building and Equipment record pages. This functionality allows you to enter additional information and/or customize the page beyond its default appearance.

To accommodate various types of data, fields can be created as a text field, text area, numeric field, radio buttons, select list, multi-select list, checkbox, and date picker.

This user guide describes the process of creating custom fields and page layouts, and then applying both to the desired area within the application.

Creating and Managing User Defined Fields

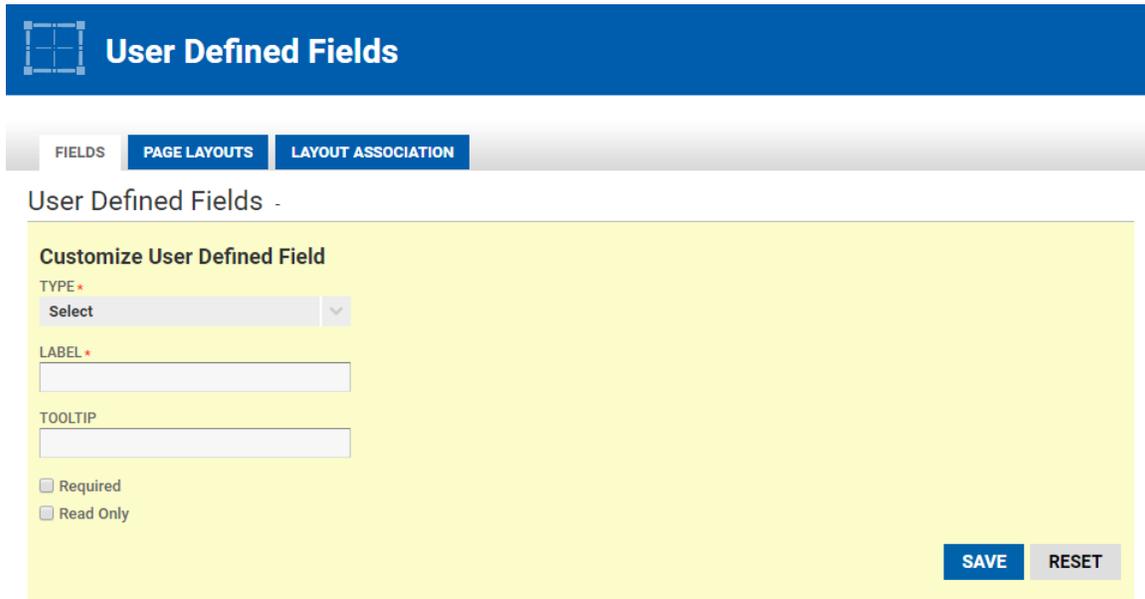
This section describes the process of creating, editing, and deleting customized user defined fields.

Creating a User Defined Field

A User Defined Field (UDF) allows you to create a custom field that captures important information on the Building and Equipment record pages. This section describes the process of creating a User Defined Field.

To create a User Defined Field (UDF):

1. Click **Admin** → **User Defined Fields**.
2. Click the **FIELDS** tab.



The screenshot shows the 'User Defined Fields' configuration page. At the top, there is a blue header with a grid icon and the text 'User Defined Fields'. Below this is a navigation bar with three tabs: 'FIELDS', 'PAGE LAYOUTS', and 'LAYOUT ASSOCIATION'. The 'FIELDS' tab is selected. The main content area is titled 'User Defined Fields -' and contains a form titled 'Customize User Defined Field'. The form has the following fields and options:

- TYPE**: A dropdown menu with 'Select' as the current value.
- LABEL**: A text input field.
- TOOLTIP**: A text input field.
- Required
- Read Only
- SAVE** button
- RESET** button

3. Select a field **TYPE**.
4. Enter a field **LABEL**.

5. (Optional) Use the **TOOLTIP** field to enter additional information or field guidance to the end-user.
6. (Optional) Click **Required** to make the field required before saving.
7. (Optional) Click **Read Only** to make the field a read only field.
8. Click **SAVE**.

Editing a User Defined Field

A User Defined Field (UDF) allows you to create a custom field that captures important information on the Building and Equipment Record pages. This section describes the process of editing a user defined field.

To edit a User Defined Field (UDF):

1. Click **Admin → User Defined Fields**.
2. Click the **FIELDS** tab.
3. Navigate down the list of custom fields and click the  that corresponds to the field that you want to edit.



  TANK CAPACITY 	<input type="text"/>
  TYPE OF PRODUCT 	Select 
  TYPE OF TANK 	Select 

4. Make your edits and click **SAVE**.

Deactivating a User Defined Field

This section describes the process of deactivating a user defined field. *Note: Deactivating a field that contains equipment or building specific information ONLY hides the data. Information within a hidden field is NOT deleted. Fields that have been deactivated can be reactivated at a later point in time.*

To deactivate a User Defined Field (UDF):

1. Click **Admin → User Defined Fields**.
2. Click the **FIELDS** tab.

- Navigate down the list of custom fields and click the  that corresponds to the field that you want to deactivate.



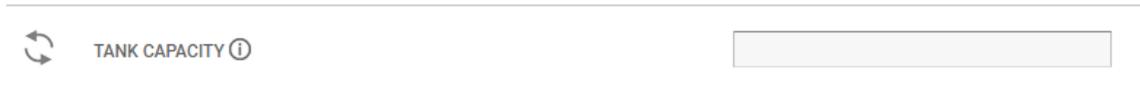
The screenshot shows a list of three User Defined Fields (UDFs):

- TANK CAPACITY (with an deactivate icon)
- TYPE OF PRODUCT** (with a deactivate icon highlighted by a red box)
- TYPE OF TANK (with an deactivate icon)

Each field has a corresponding input field to its right: a text box for 'TANK CAPACITY', a dropdown menu for 'TYPE OF PRODUCT', and another dropdown menu for 'TYPE OF TANK'.

- Click **YES** to confirm field deactivation.
- (Optional) To reactivate a field, navigate to the bottom of the page, and click **Deactivated Fields**.

Deactivated Fields



The screenshot shows the 'Deactivated Fields' section with one field listed:

- TANK CAPACITY (with a refresh icon)

The field has an empty input box to its right.

- (Optional) Locate the field you want to reactivate and click .

Defining the Page Layout

User Defined Fields (UDFs) can be incorporated into existing page sections or grouped together into their own sections. Currently, a unique page layout can be created for your Building page and each of the equipment categories within the Preventive Maintenance module.

This section describes the process of creating, editing, and deleting Page Layouts.

Creating an Equipment Page Layout

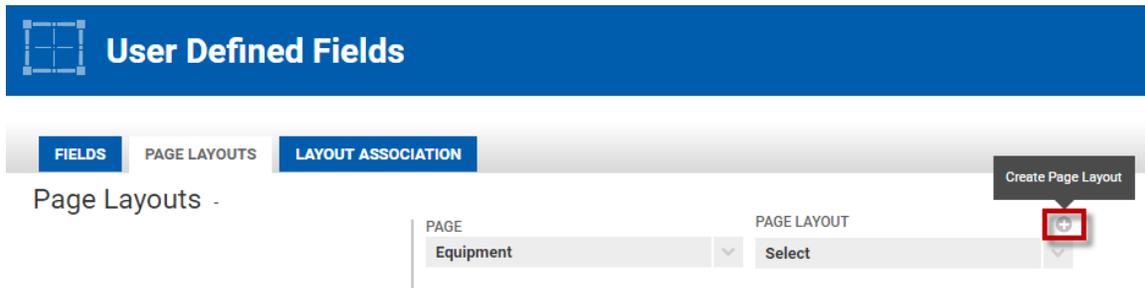
After your equipment specific User Defined Fields (UDFs) have been created, you have the ability to organize and add them to your Equipment and Building pages. In order to capture the most important equipment information, in the most ideal format, page layouts can be customized to each of the categories in the Preventive Maintenance module.

This section describes how to create a customized Equipment page layout using your User Defined Fields.

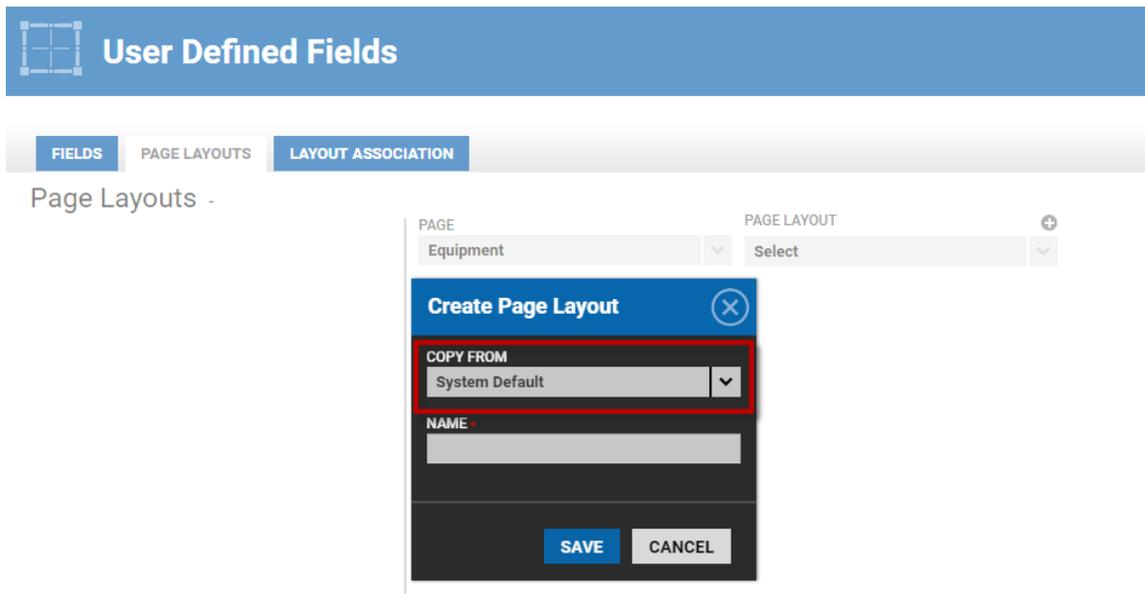
To create a new equipment page layout:

- Click **Admin → User Defined Fields**.
- Click the **PAGE LAYOUTS** tab.

- Using the **PAGE** field, select **Equipment**.
- Click the **Create Page Layout**  icon.



- Enter a page layout **NAME**.
- (Optional) To begin creating a new page layout using a previous page layout as a starting point, select a page from the **COPY FROM** field.



- Click **SAVE**. *Note: For instruction on customizing and/or editing an equipment page layout, refer to **Editing a Page Layout**.*

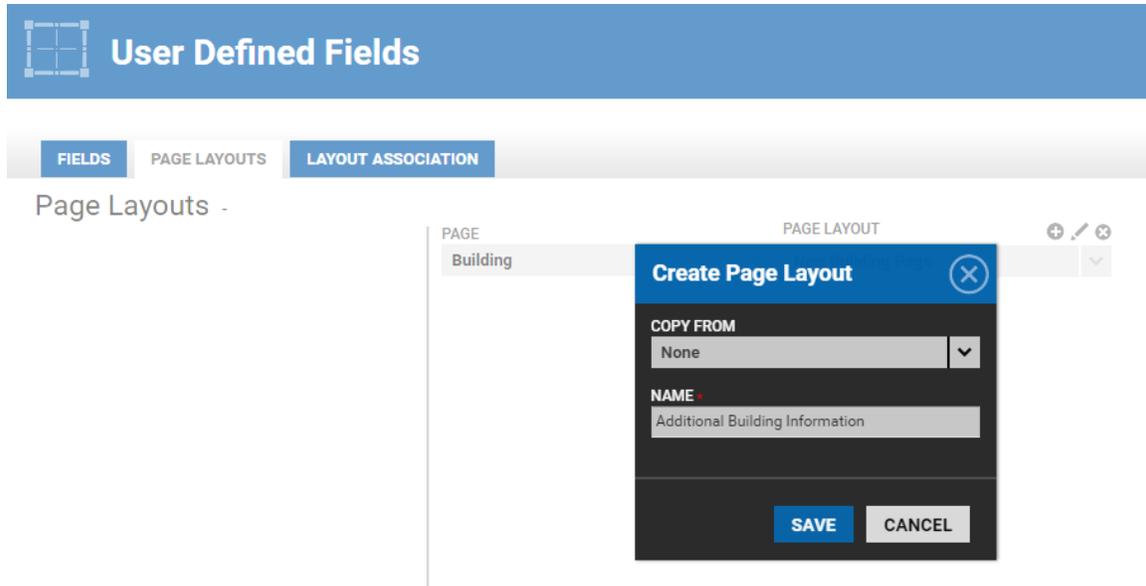
Creating a Building Page Layout

After your building specific User Defined Fields (UDFs) have been created, you have the ability to organize and add them to the existing Building page.

This section describes how to create a customized Building page layout using your User Defined Fields.

To create a new building page layout:

1. Click **Admin** → **User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.
3. Using the **PAGE** field, select **Building**.
4. Click the **Create Page Layout**  icon.
5. Enter a Page Layout **NAME**.



6. (Optional) To begin creating a new page layout using a previous page layout as a starting point, select a page from the **COPY FROM** field.
7. Click **SAVE**.

Editing a Page Layout

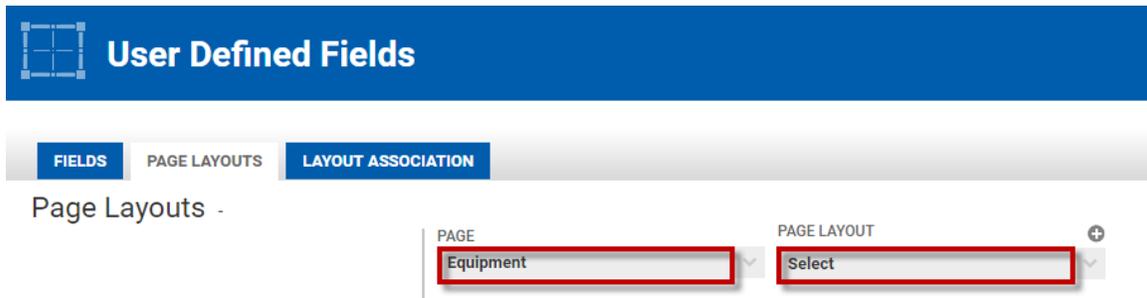
After an equipment or building page layout has been created you can organize your User Defined Fields (UDFs) new or existing into sections.

This section describes the process of editing a page layout.

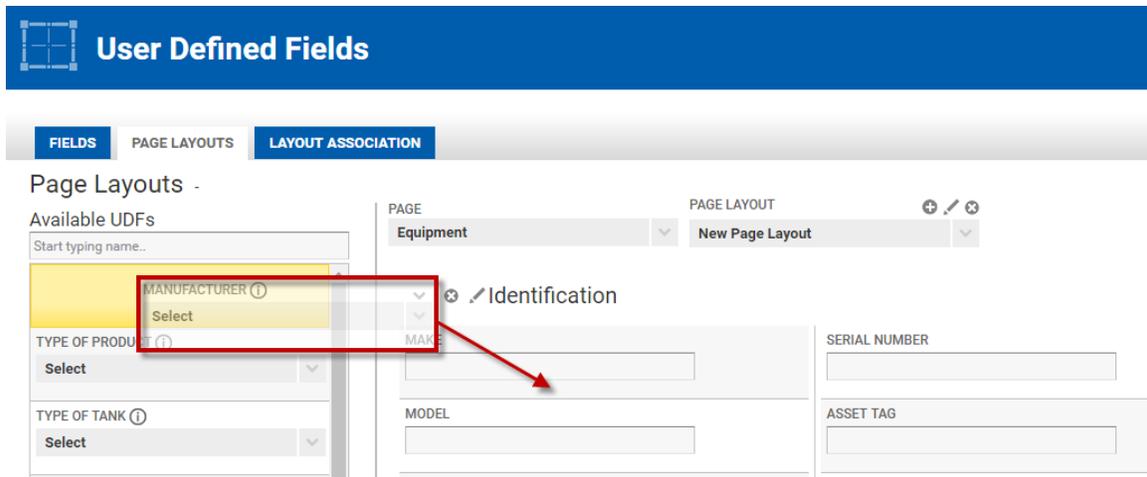
To edit a page layout:

1. Click **Admin** → **User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.

3. Select a **PAGE** and a **PAGE LAYOUT**.



4. (Optional) To add a User Defined Field (UDF) to a section, left click the UDF from the **Available UDFs** field and perform a drag and drop to the desired section on the right side. Repeat this step until you have added all the UDFs you want to the page.



5. (Optional) **To rearrange fields within a section:** left click the field and perform a drag and drop to the desired section.
6. (Optional) **To edit a section name:** click the  icon located next to the section name.

7. (Optional) **To create another column in a section:** Click the **[+]** located to the right of the section.

8. (Optional) **To delete a column from a section:** Click **[X]**.

9. Once you have finished making your page edits, navigate to the bottom of the page and click **PREVIEW**.
10. (Optional) If additional edits are required, click **BACK** and repeats steps 4-9 as necessary.
11. Once all edits are completed, click **PUBLISH**.

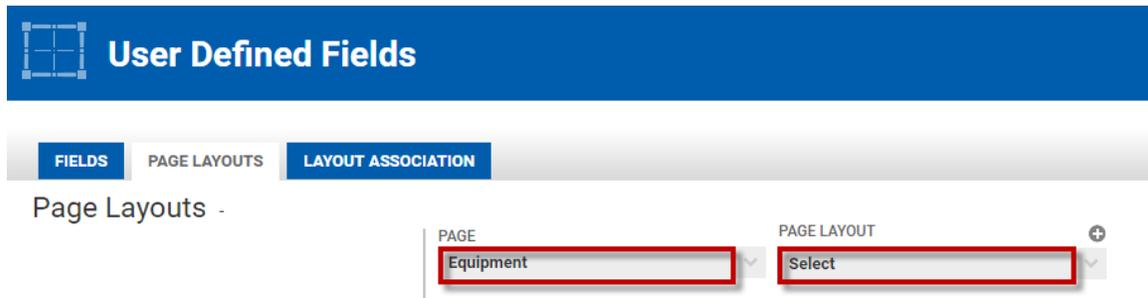
Adding a Section to a Page Layout

This section describes the process of creating another section to a page layout.

To add a section to a page layout:

1. Click **Admin** → **User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.

3. Select a **PAGE** and a **PAGE LAYOUT**.



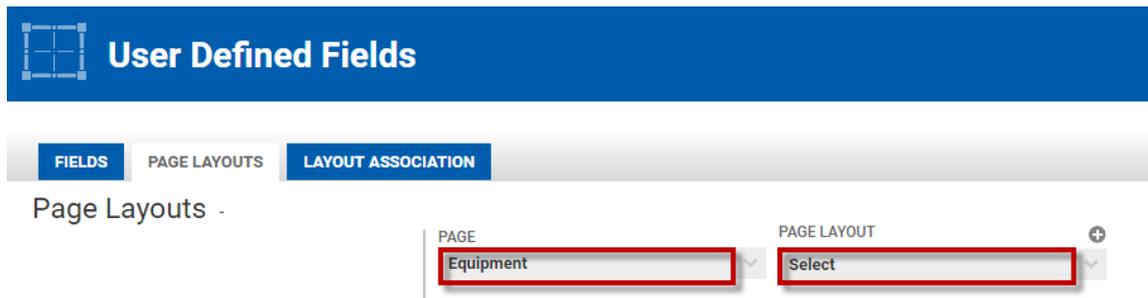
4. Click  .

Deleting a Section from a Page Layout

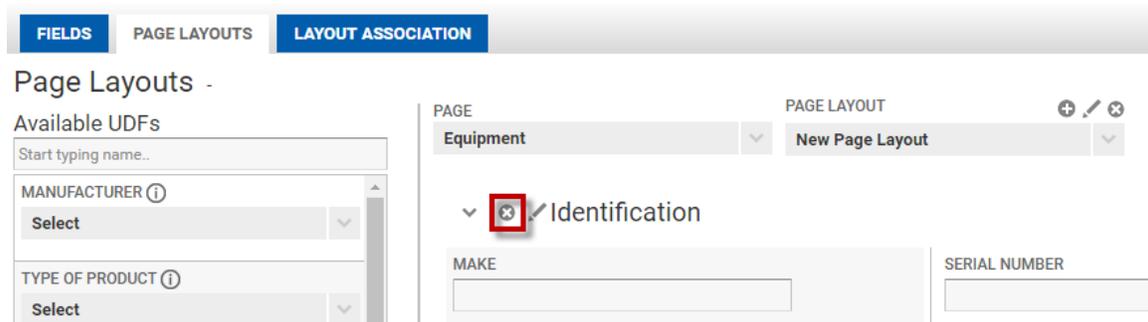
This section describes the process of deleting a section from a page layout. *Note: Deleting a section ONLY removes the UDF grouping and hides the associated data. Data entered into a UDF is NOT permanently deleted and can be re-accessed when the UDF is added to another section.*

To delete a section to a page layout:

1. Click **Admin** → **User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.
3. Select a **PAGE** and a **PAGE LAYOUT**.



4. Click the  which corresponds with the section you want to delete from the page.



Associating Page Layouts

After creating the User Defined Fields (UDFs) and page layouts you need to associate your page layout to an Equipment category and/or Building List. This section describes the process of associating the page layouts.

Associating a Page Layout to an Equipment Category

This section describes the process of associating an Equipment page layout to an Equipment category.

To associate a page layout to an Equipment category:

1. Click **Admin** → **User Defined Fields**.
2. Click the **LAYOUT ASSOCIATION** tab.
3. Using the **PAGE** field, select **Equipment**.
4. Using the **PAGE LAYOUT** field, select the page layout you want to associate to equipment categories.
5. Click the **EQUIPMENT CATEGORIES** that are associated to the page layout.
6. After all of the Equipment categories have been selected, click **>**.

User Defined Fields

FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Layout Association - Danielle Danielle Danielle

PAGE
Equipment

PAGE LAYOUT
HVAC Unit

EQUIPMENT CATEGORIES

Begin Typing

Unassociated Items

- Building Equipment
- ELEVATORS
- Electrical
- Elevators, Escalators, & Lifts
- Fire, Life, & Safety
- Gas Generator
- HVAC
- HVAC - Air Compressors
- HVAC - Air Handling Equipment
- HVAC - Boilers
- HVAC - Cabinet/Unit Heaters
- HVAC - Chillers
- HVAC - Cold Boxes
- HVAC - Cooling Towers
- HVAC - Exhaust Fans
- HVAC - Pumps

ITEMS ASSOCIATED TO HVAC UNIT

Begin Typing

SAVE

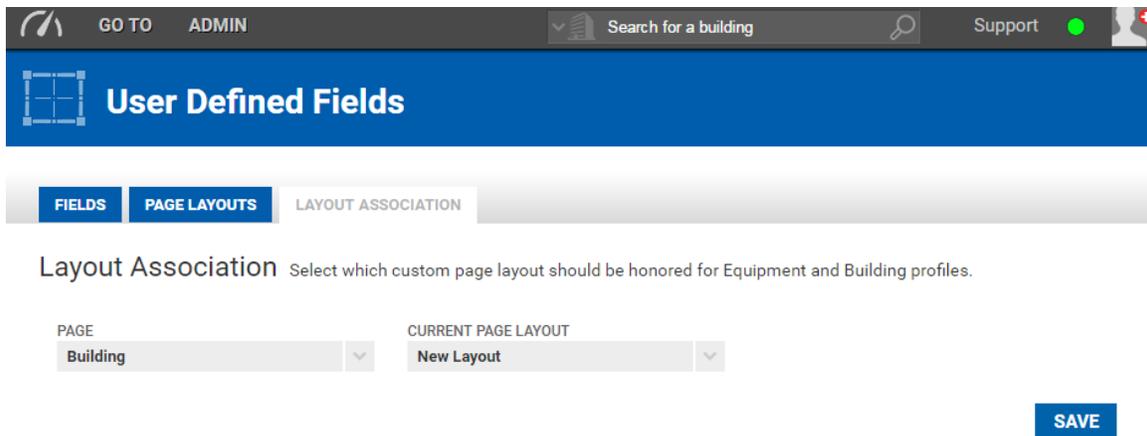
7. Click **SAVE**.
8. Repeat steps 3-7 until all pages layouts have been associated to equipment categories.

Associating the Page Layout to Building Pages

This section describes the process of associating the Building page layout to all your Building pages. Unlike the Equipment page layout, there is only one Building page layout for all buildings in your portfolio.

To associate the page layout to your Building pages:

1. Click **Admin → User Defined Fields**.
2. Click the **LAYOUT ASSOCIATION** tab.
3. Using the **PAGE** field, select **Building**.
4. Using the **CURRENT PAGE LAYOUT** field, select the page layout you want to associate to your Building pages.



The screenshot shows the 'User Defined Fields' interface. At the top, there is a navigation bar with 'GO TO ADMIN', a search bar for buildings, and a 'Support' link. Below this is a blue header with the 'User Defined Fields' title. A horizontal menu contains three tabs: 'FIELDS', 'PAGE LAYOUTS', and 'LAYOUT ASSOCIATION'. The 'LAYOUT ASSOCIATION' tab is active. Below the tabs, the text reads 'Layout Association Select which custom page layout should be honored for Equipment and Building profiles.' There are two dropdown menus: 'PAGE' with 'Building' selected, and 'CURRENT PAGE LAYOUT' with 'New Layout' selected. A blue 'SAVE' button is located at the bottom right of the form.

5. Click **SAVE**.