Custom Data Specification

There are five areas within the system that each provide fifteen user defined fields for either Management Company or Client level use. These are: Building, Asset, Work Order, People and Resource. Buildings, Assets and Work Order fields can be renamed at a Management company level or at a more specific Client Level. Because Resources and People are held at Management Company level, they are only available to be renamed at this level.

1. Using the Custom Data Specification button, select which of the five areas require changing. If Building, Asset or Work Order is selected, the next step is to select the Client that will be used. For information on how to do this, see the Client Selection page. If Resource or People is selected, Client Selection is skipped.

2. By selecting the relevant user defined field from the left hand window and clicking the Edit button in the top right of the screen, the User will be presented with a pop up window allowing them to change the Name, Maximum Length and Default Value of the user defined field.

3. Changing the Name at a Management Company or Client level has an immediate effect on that field and will be replicated to all Buildings, Assets, People, Resources or Work Orders. The Default Value field, when populated, will apply this default value to all relevant Buildings, Assets, People, Resources or Work Orders but ONLY where that user defined field is currently blank, otherwise the original value remains in place.

4. The Type of Data, Precision and Nullable fields are not currently editable in the user interface.

It should be noted that:

The user defined information is intelligent in that if information specified at Client level matches that at Management Company level, the Client specific detail is removed and the Management Company setting will override that Client. If Client details are subsequently updated, a new Client specific record is created. Client detail alignment will occur when either the Management Company changes to match Client data or Client data changes to match Management Company data.

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