

What are Custom forms?

help2.fractal.com/hc/en-us/articles/25230165717133-What-are-Custom-forms

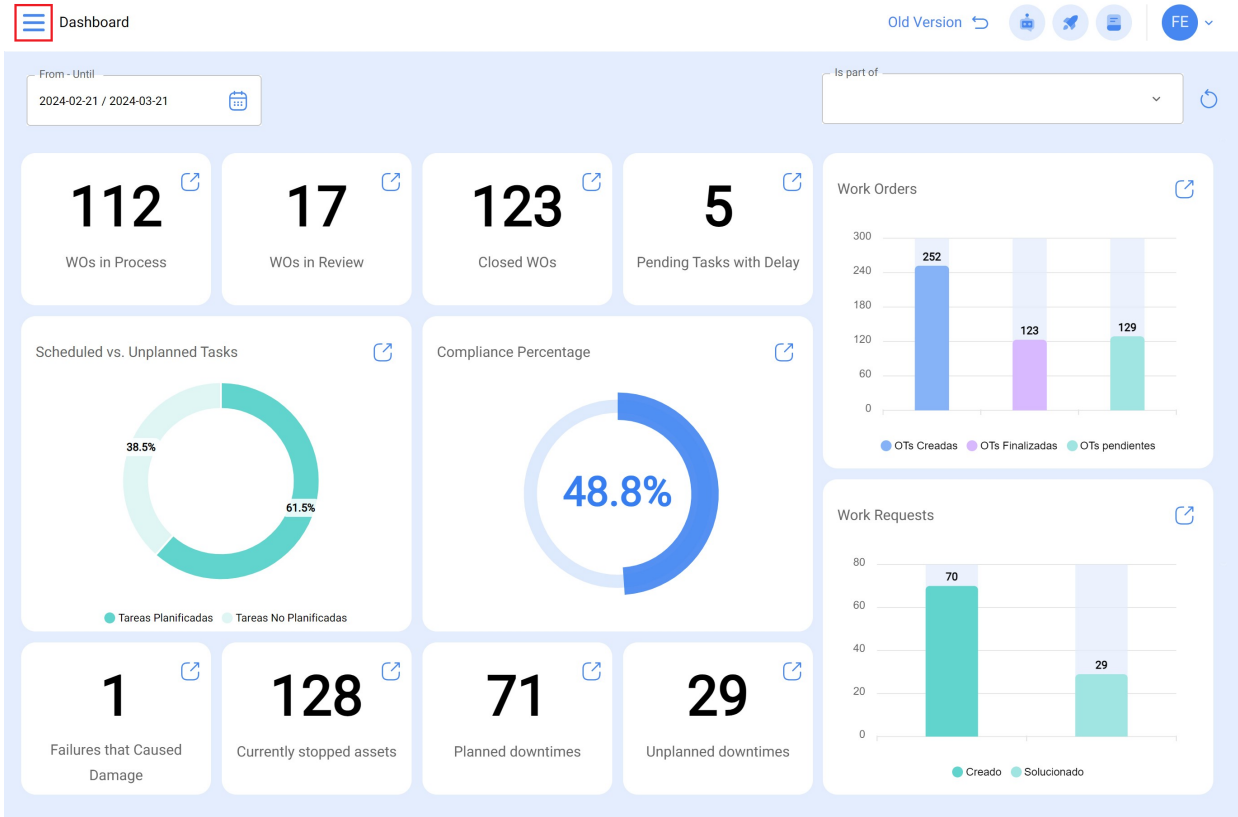
The forms or custom fields are groups in which assets can be categorized, but having in common a set of fields or labels that can be created and customized as required.

Main Characteristics:

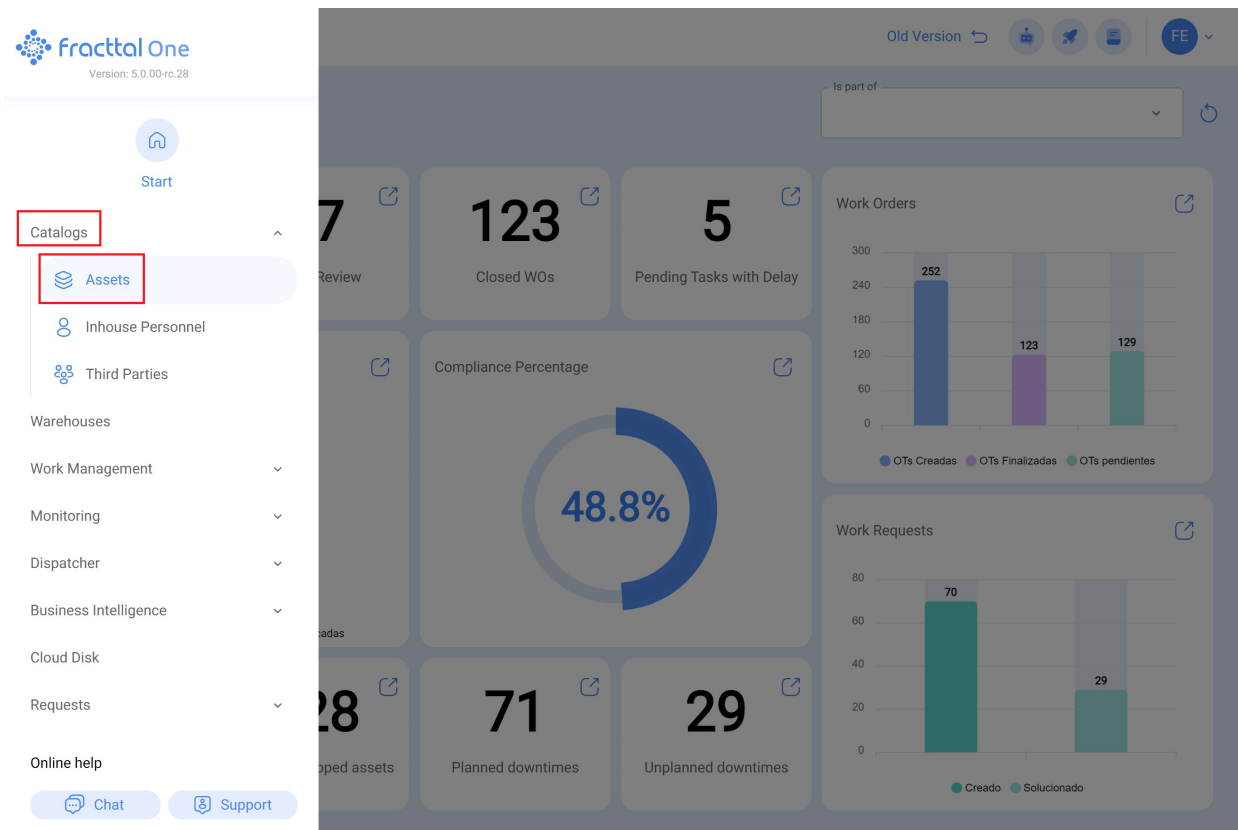
1. **Customizable Fields:** Field customization is crucial. Users can define and adapt fields according to the particularities of their business or project. This ensures that the information collected is relevant and specific.
2. **Flexibility in Tags:** Custom tags or labels are essential for searching and filtering data. Custom forms allow for flexible creation and assignment of tags, enhancing search and analysis capabilities.
3. **Adaptability to Business Processes:** By being able to customize forms, companies can adapt the data structure to their specific processes. This is crucial to maintain consistency in information collection and analysis.

How to create a customized form for an asset?

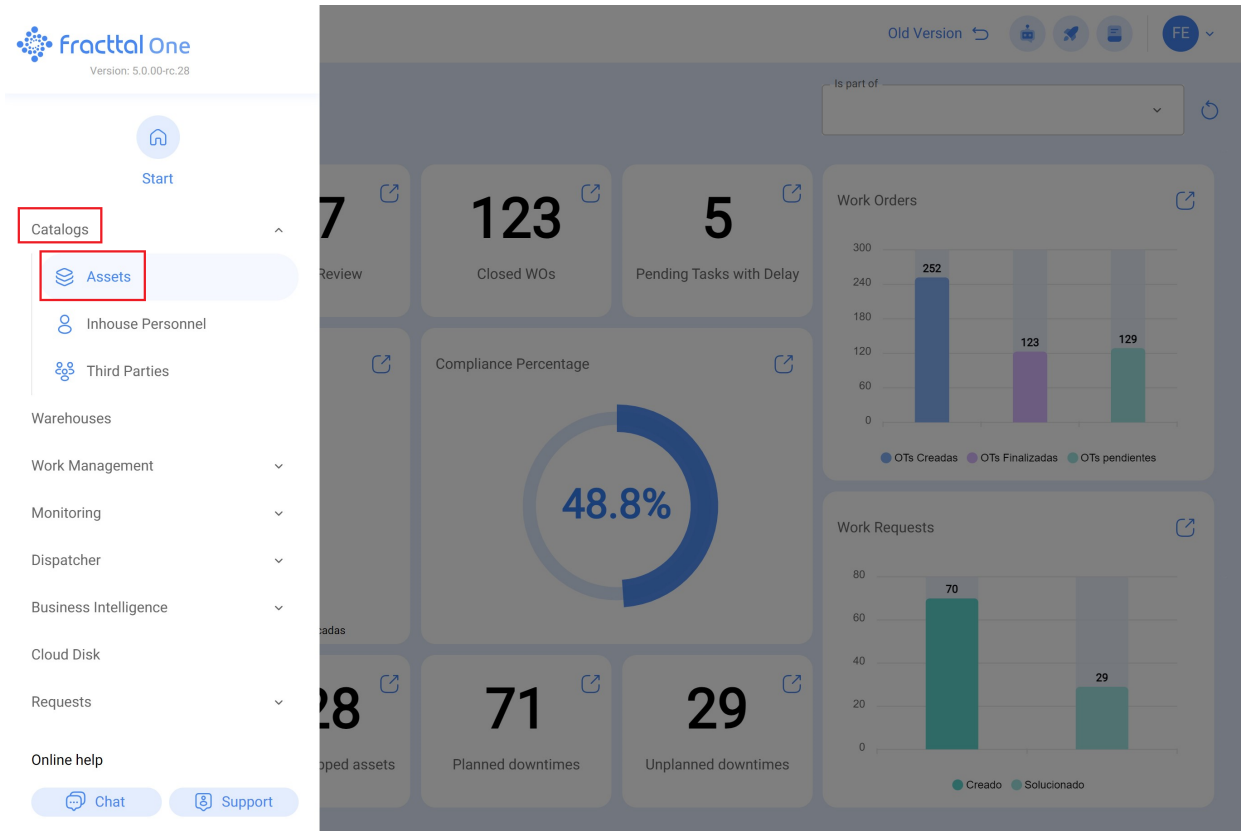
1. Log in and click on the menu located at the top left of the screen.



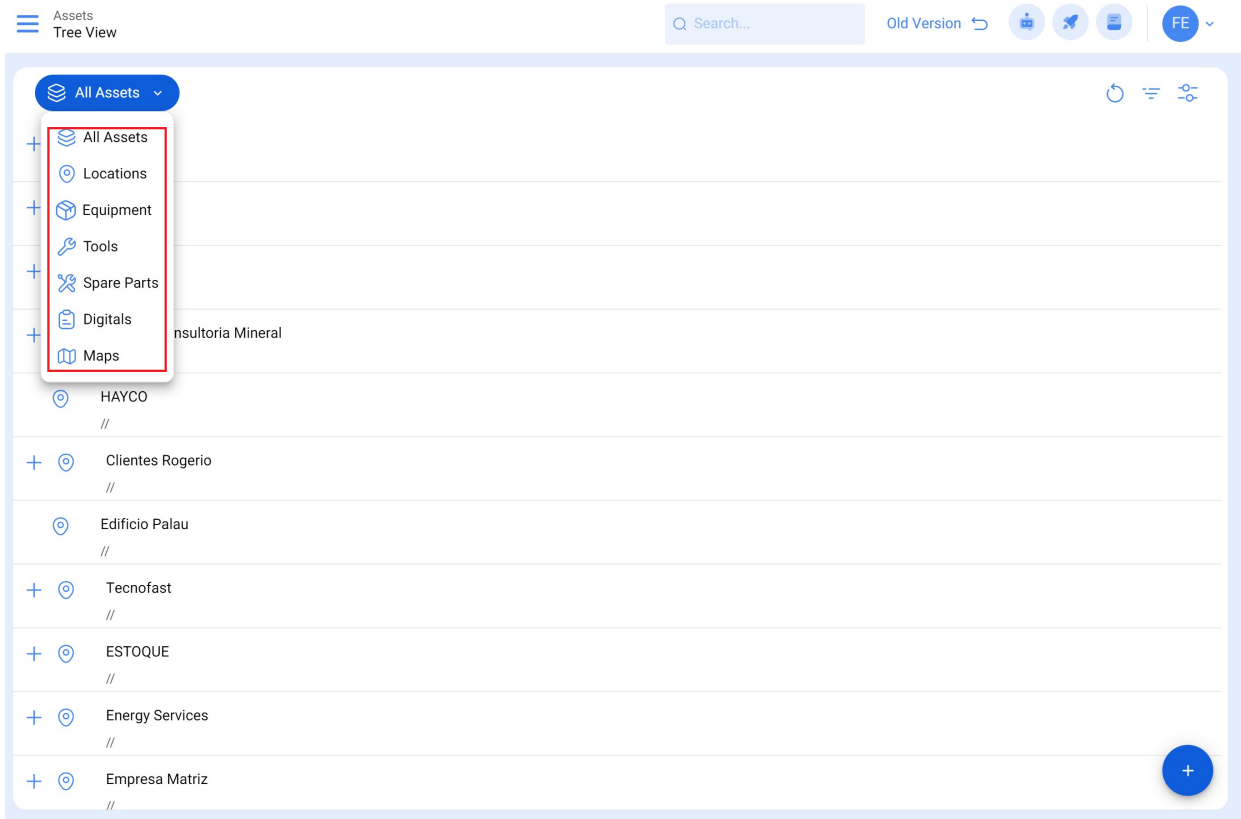
2. In the menu, select the "Catalogs" module.



3. select the active option.



4. Select the asset type where you want to set the custom form.



5. Select the specific asset where you want to set the custom form. If the asset does not exist, create it by clicking on the plus (+) symbol in the lower right corner.

Description	Enabled	Out of Service	Code	Group 1	Hours of average daily use...	Plan
{ 0000-4 } VENTILADOR MECANICO MAQUET CRITICAL CARE	No	No	0000-4	CLASE 1	24:00	
{ 000-2 } VENTILADOR MECANICO ARYZTA	Yes	Yes	000-2	CLASE 1	24:00	PL
{ 000-3 } VENTILADOR MECANICO ARYZTA	Yes	No	000-3	CLASE 1	24:00	PL
{ 001-01 } MAQUINA DE EMPAQUE	No	No	001-01		24:00	
{ 001-02 } MAQUINA DE EMPAQUE	Yes	No	001-02		24:00	
{ 001235 } Carro Ford	Yes	No	001235		24:00	
{ 01APO1001 } TURBINA G1 ANDRYZ	Yes	No	01APO1001		24:00	
{ 01APO1002 } GOBERNADOR DE TURBINA	Yes	No	01APO1002		24:00	
{ 05 } BEBEDOURO - JOÃO LUCAS	Yes	No	05		24:00	PL
{ 1213 } MAQUINA PRINCIPAL	Yes	No	1213		24:00	
{ 1214 } Break principal Eafit Idiomas Emerson	Yes	No	1214	Suministro	24:00	Ma
{ 123123 } Vehículo Consignaciones Bertolaza	Yes	No	123123		24:00	MT

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6. Within the selected asset, in the left side menu, choose the "Custom Form" option.

{ 0000-4 } VENTILADOR MECANICO MAQUET CRITICAL CARE

Save

Custom Form

⚠ This action requires saving changes

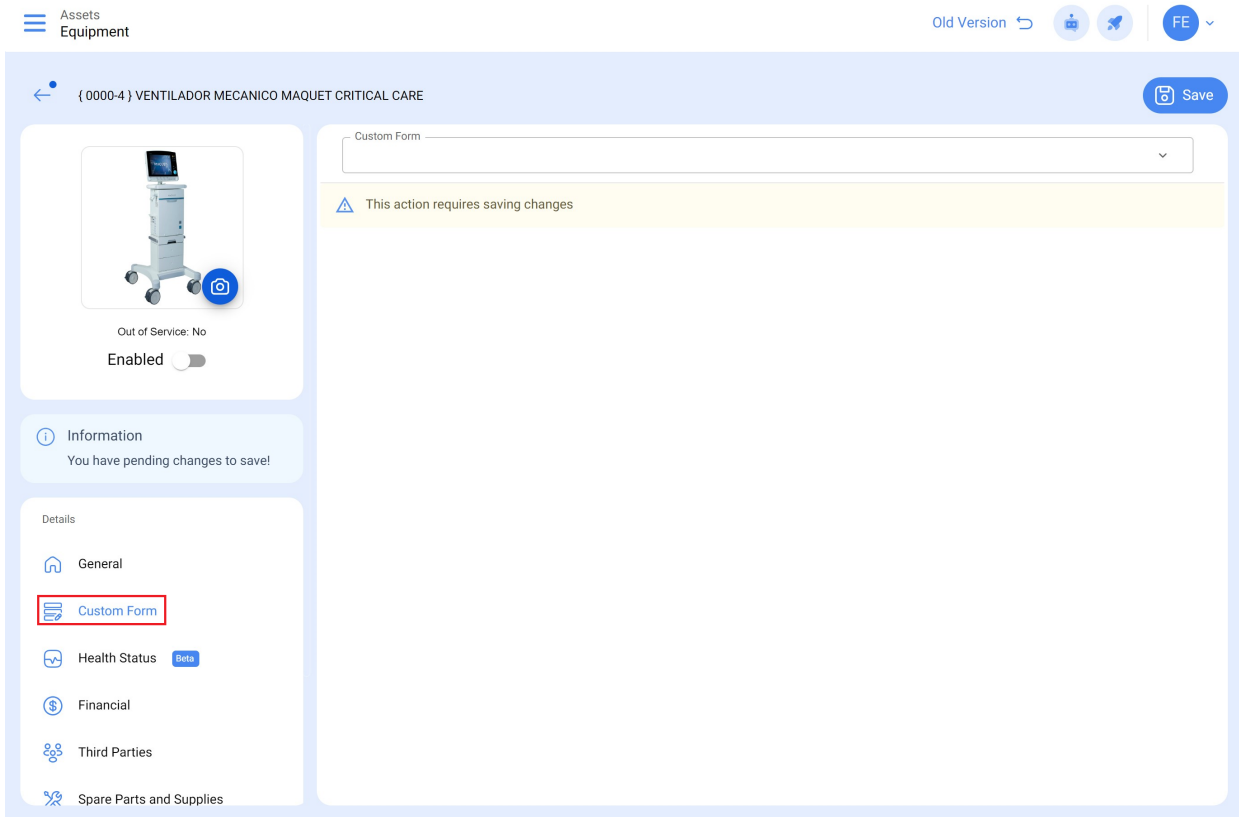
Out of Service: No
Enabled

Information
You have pending changes to save!

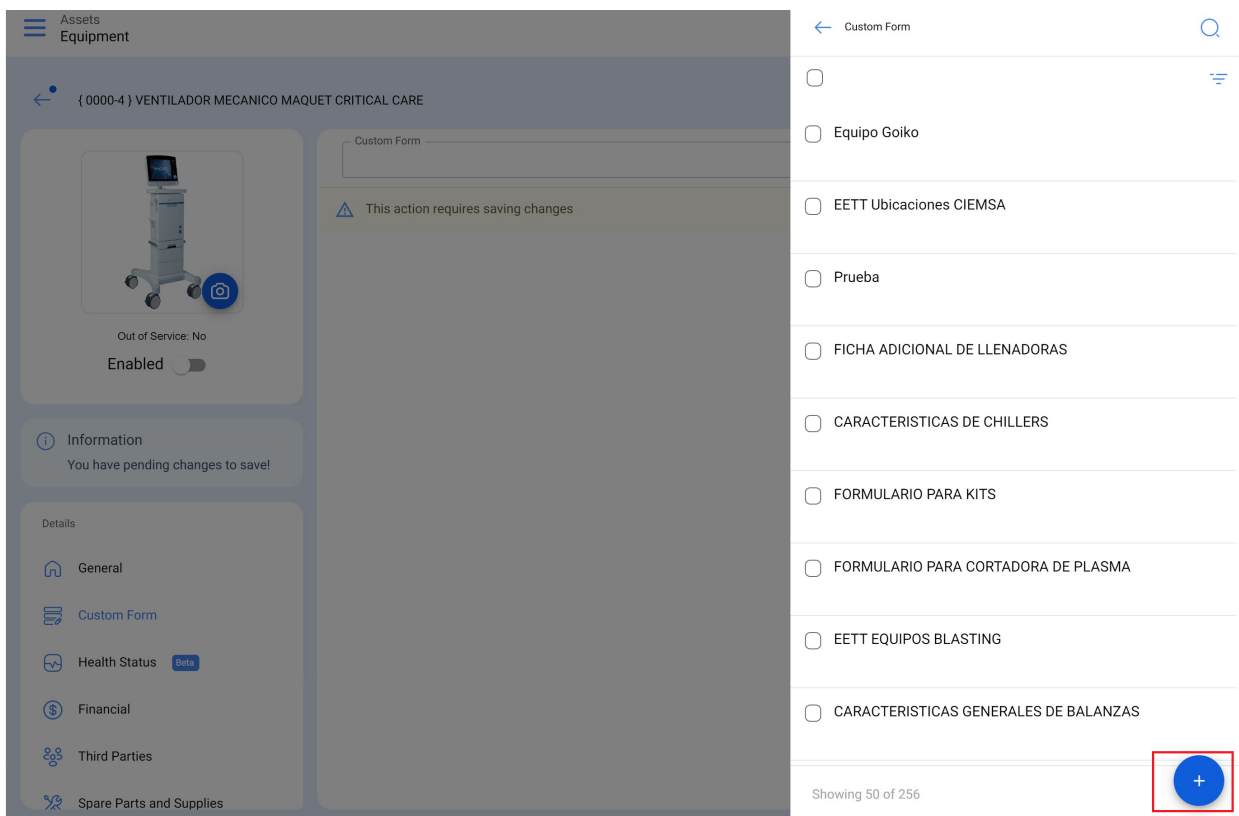
Details

- General
- Custom Form
- Health Status Beta
- Financial
- Third Parties
- Spare Parts and Supplies

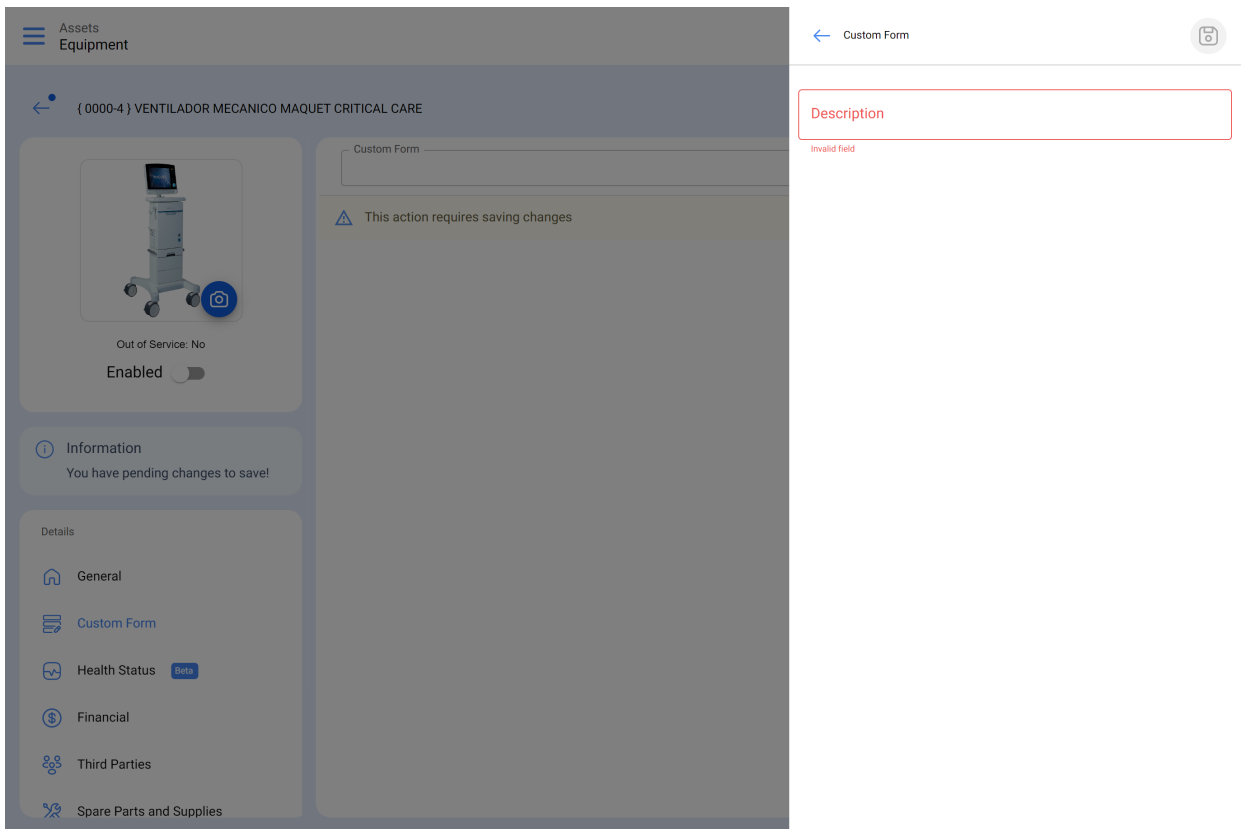
7. Click on the rectangle under the heading "Custom Form".



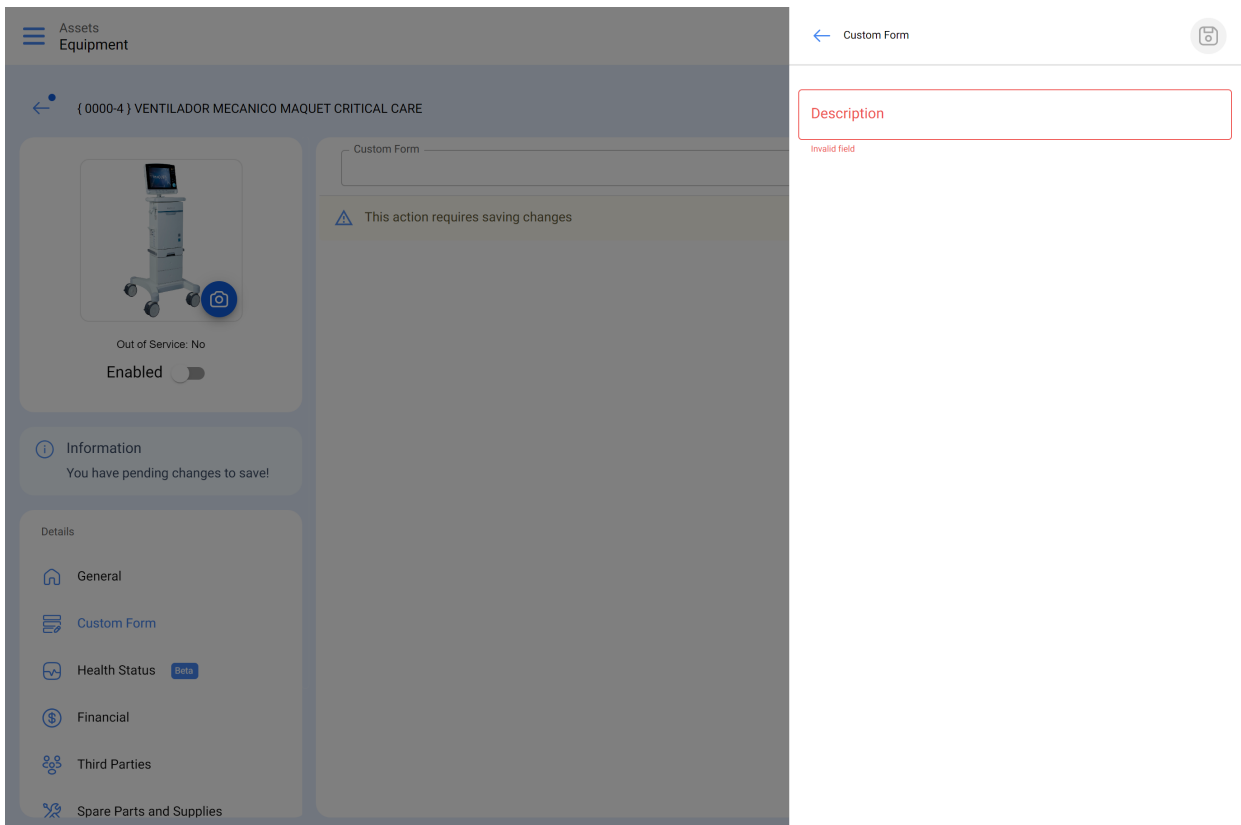
8. Click on the plus (+) button in the lower right corner of the box.



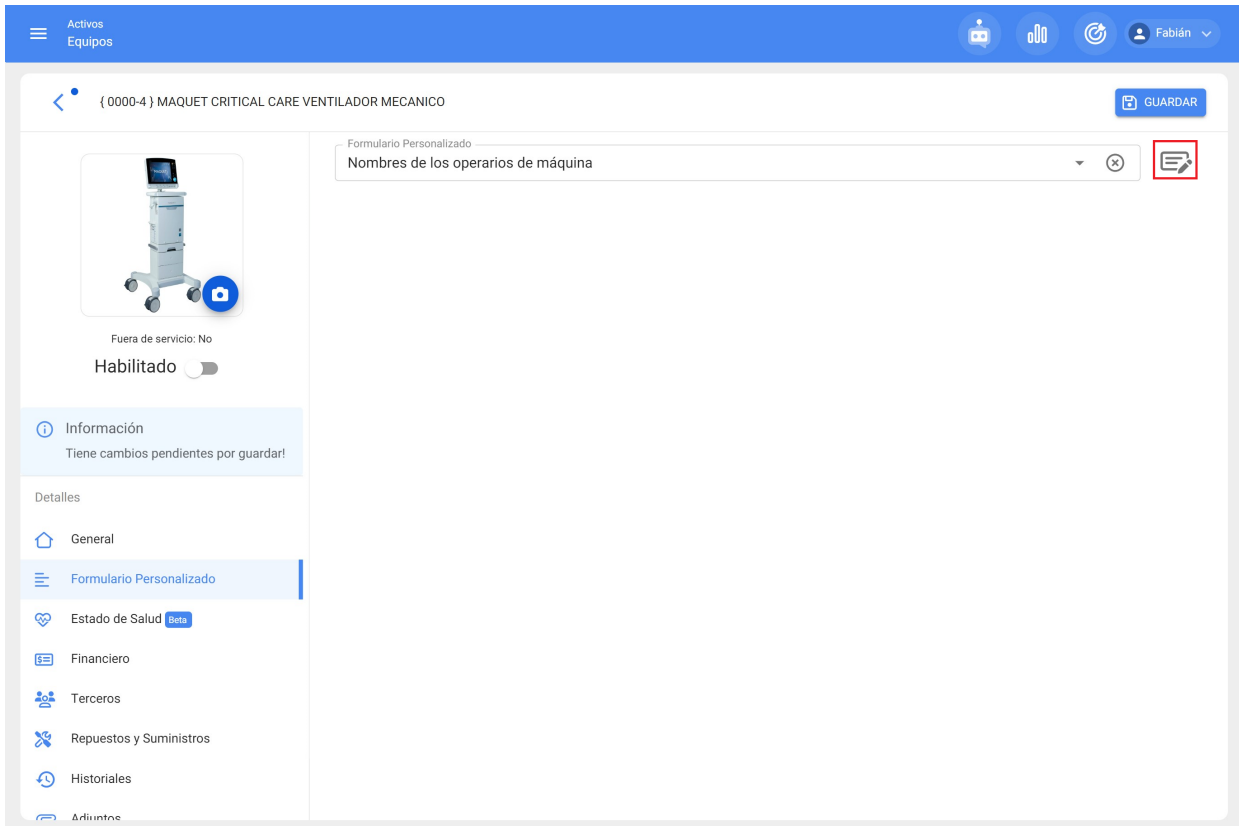
9. In the description box, add a title that reflects the purpose of your new custom form and then click "Save".



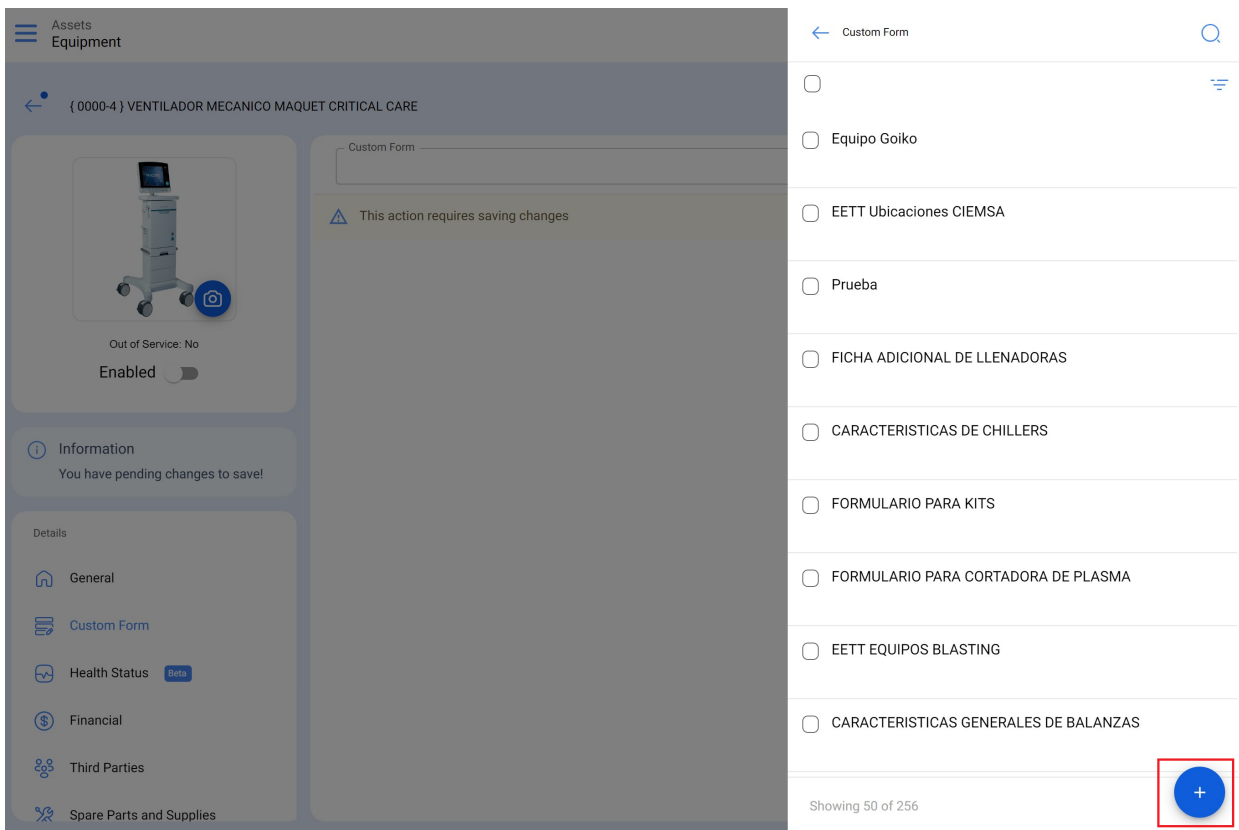
10. Select the newly created title.



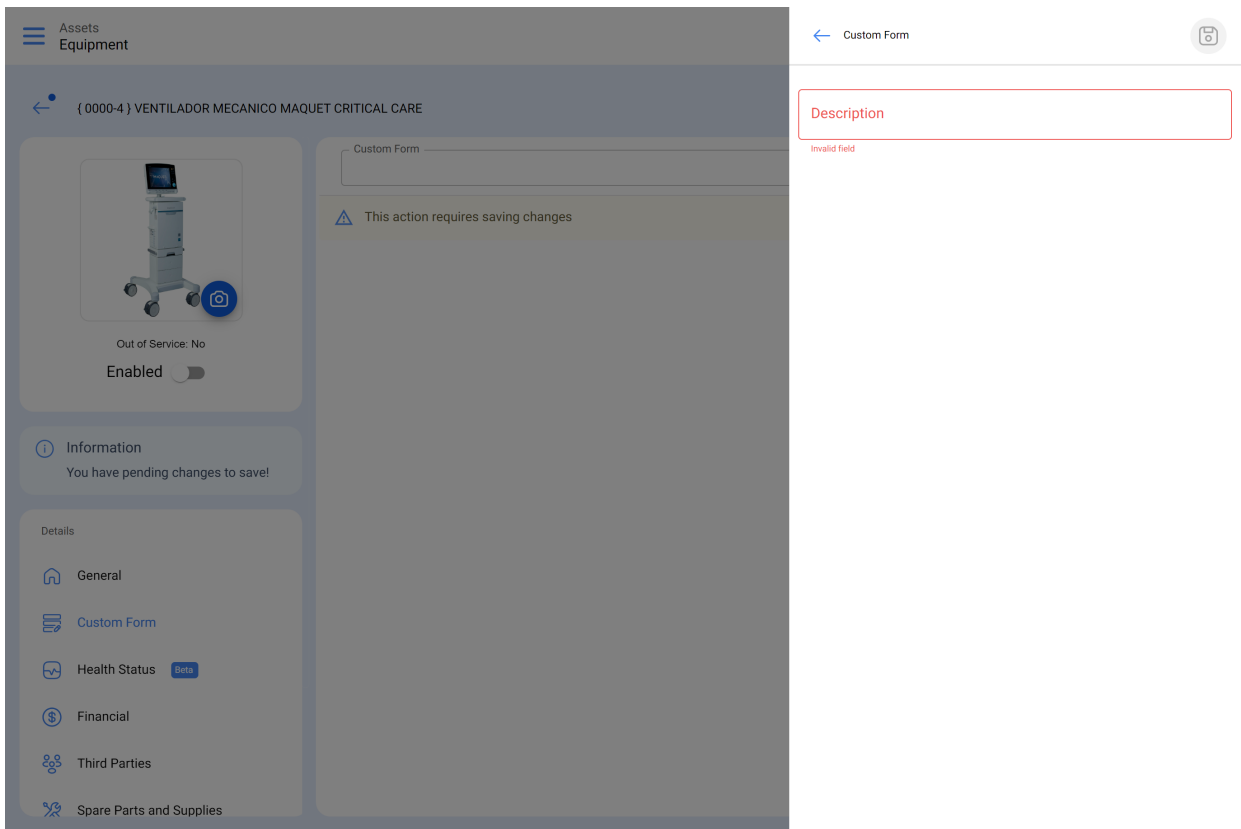
11. Click on the pencil icon on the paper.



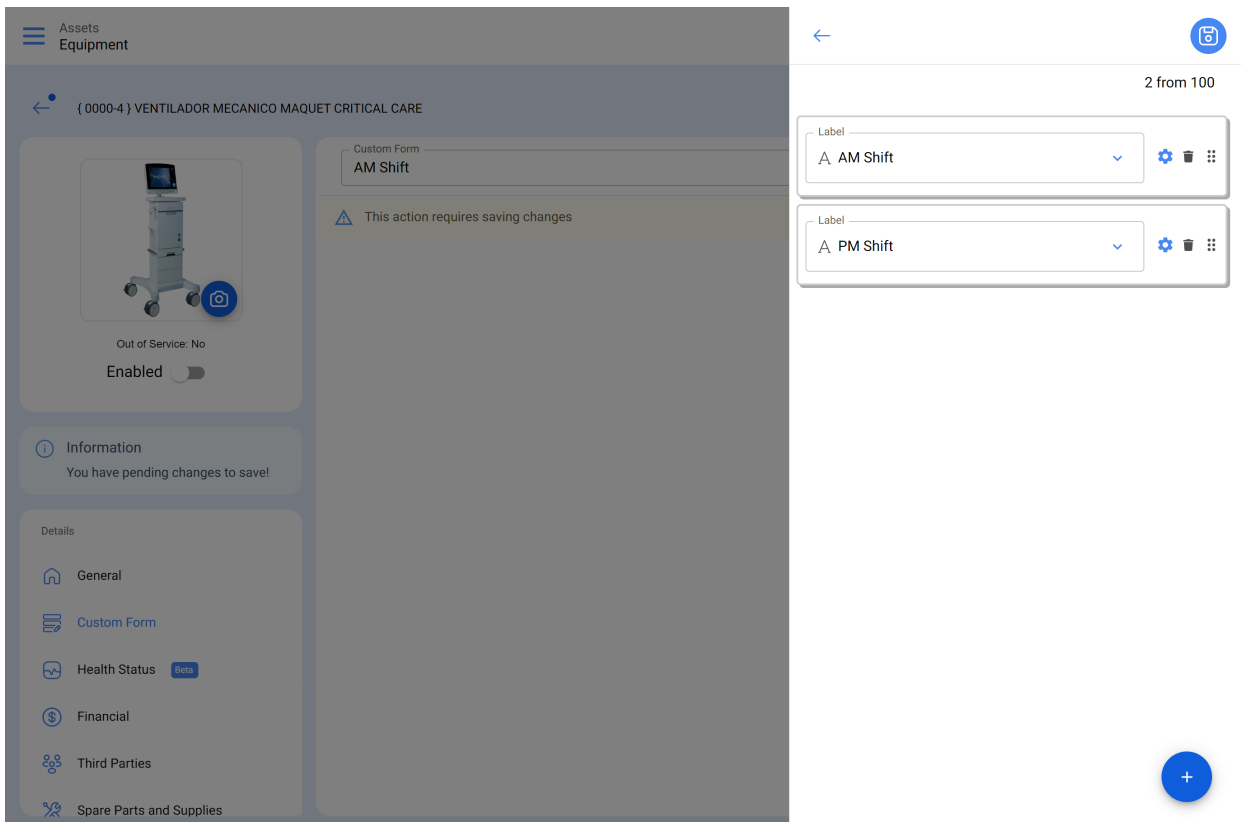
12. Click on the plus (+) symbol in the lower right corner of the box.



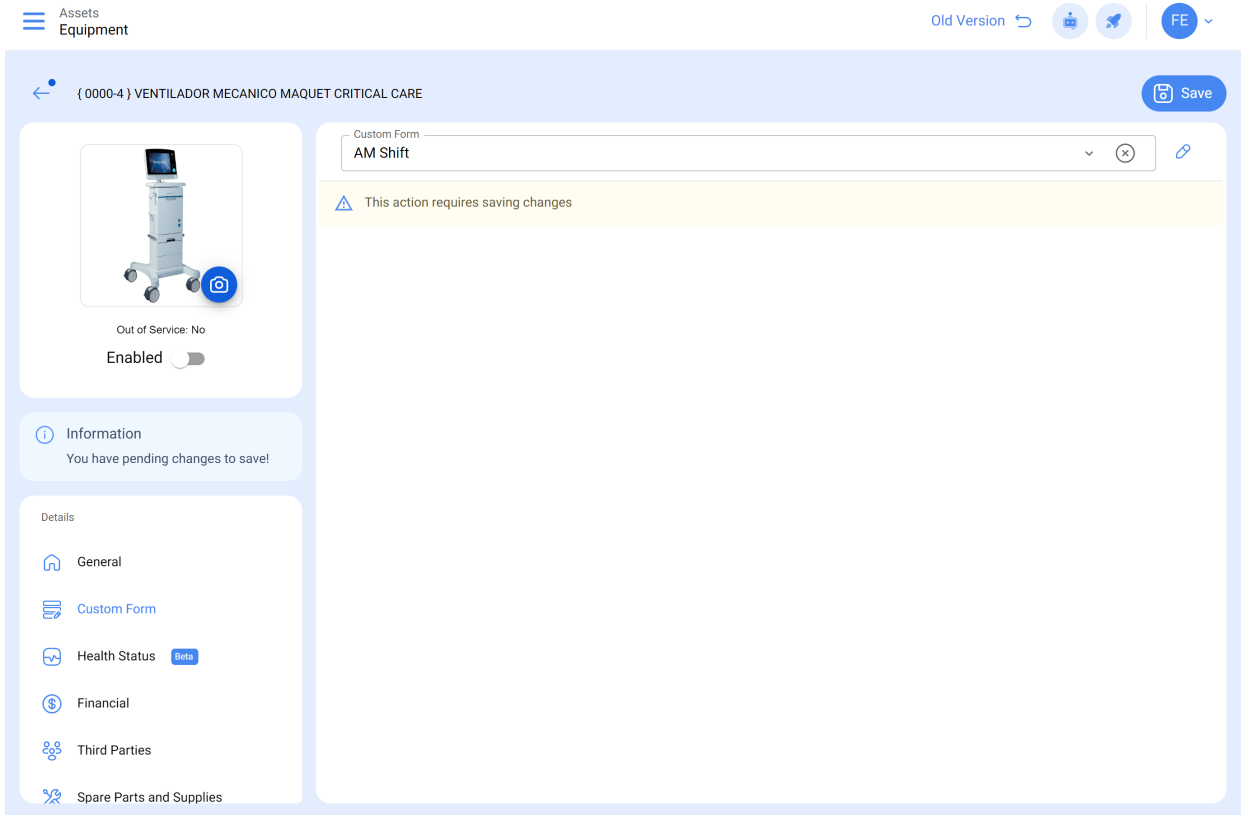
13. In the label box, enter a title that represents the data you wish to obtain on the custom form (e.g. Weight, Voltage, etc.) and then click "Save".



14. If you want to add more data to the custom form, repeat the previous step.




15. Finally, click on "Save" to enter the data in your new customized form.



By following these steps, you will have successfully created a customized form and entered the desired information.

← { 0000-4 } VENTILADOR MECANICO MAQUET CRITICAL CARE Save



Out of Service: No
Enabled

Custom Form
AM Shift

AM Shift

PM Shift

Details

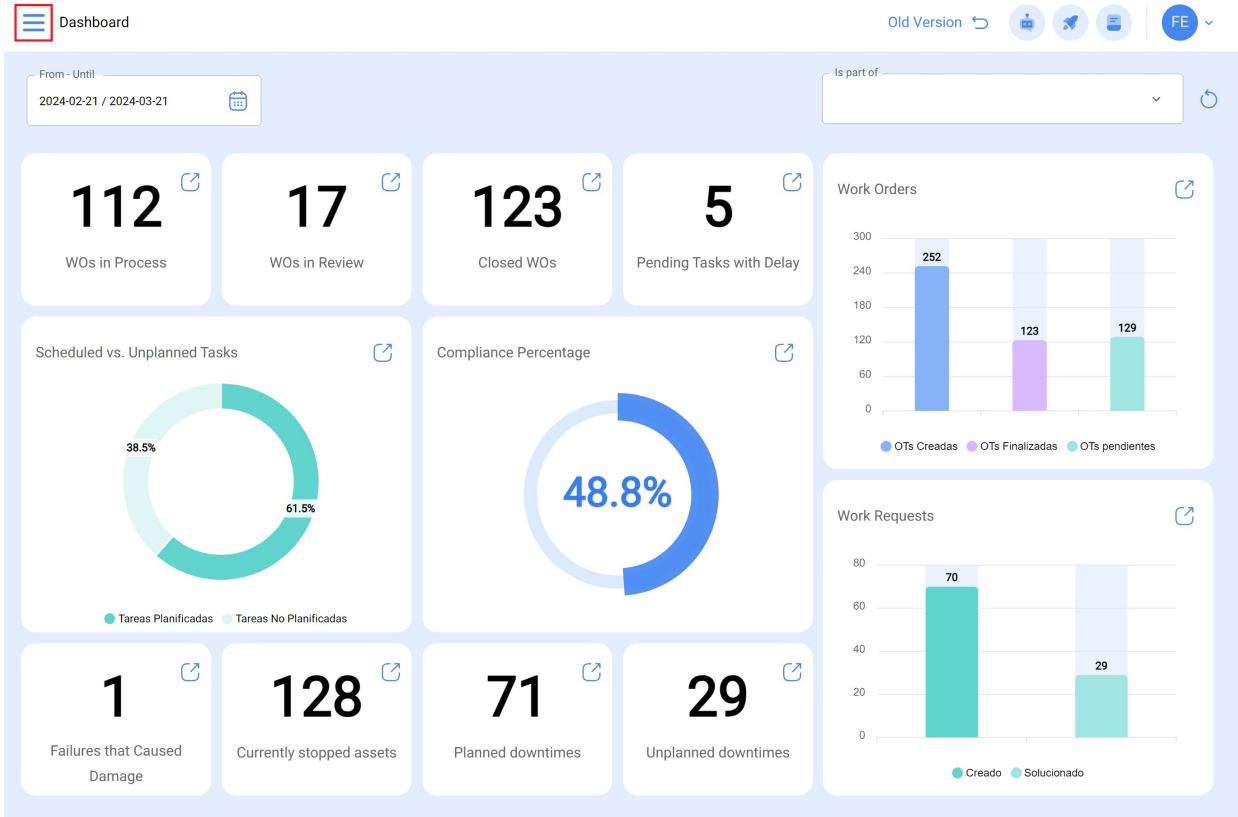
- General
- Custom Form
- Health Status Beta
- Financial
- Third Parties
- Spare Parts and Supplies
- Historical
- Attachments

✔️ Action Done ✕

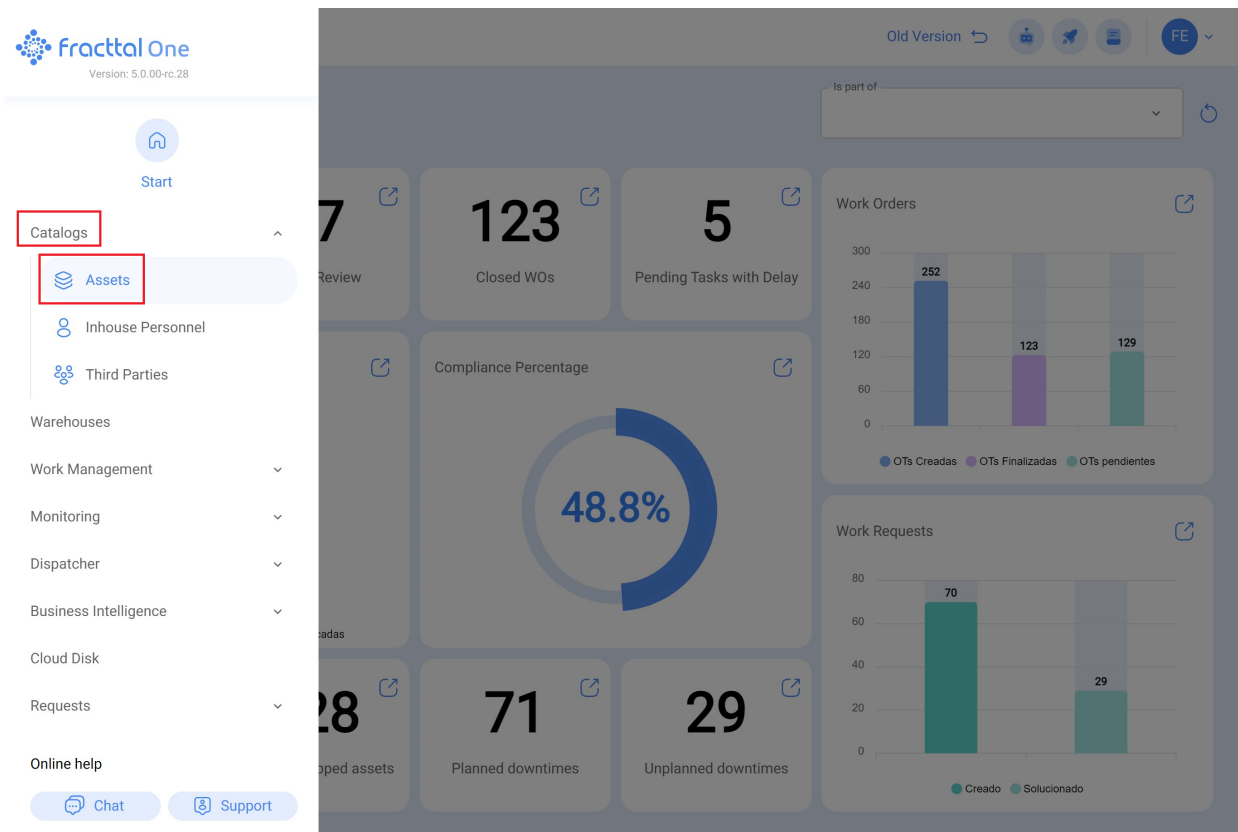
Remember that this information that you have created in the custom form can be filtered in case you want to extract information.

How do I filter an existing custom form?

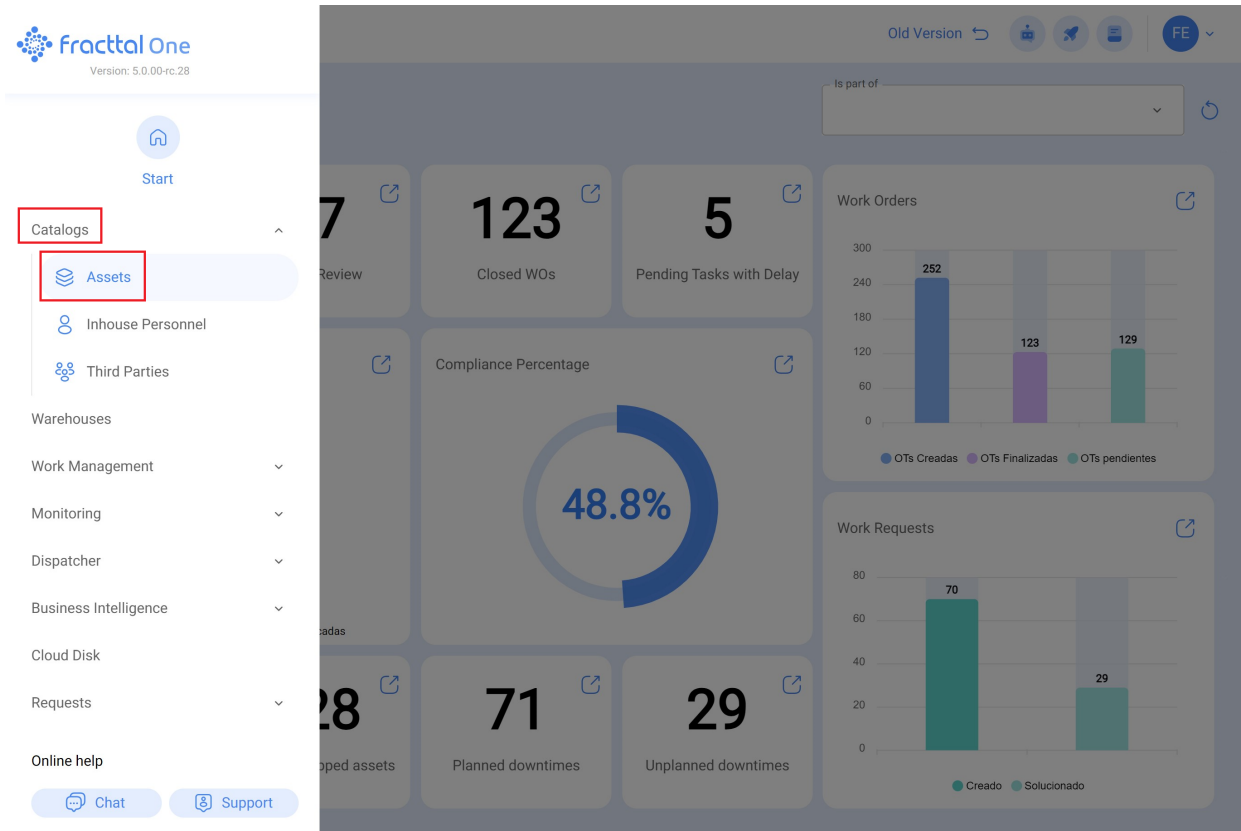
1. Log in and click on the menu located at the top left of the screen.



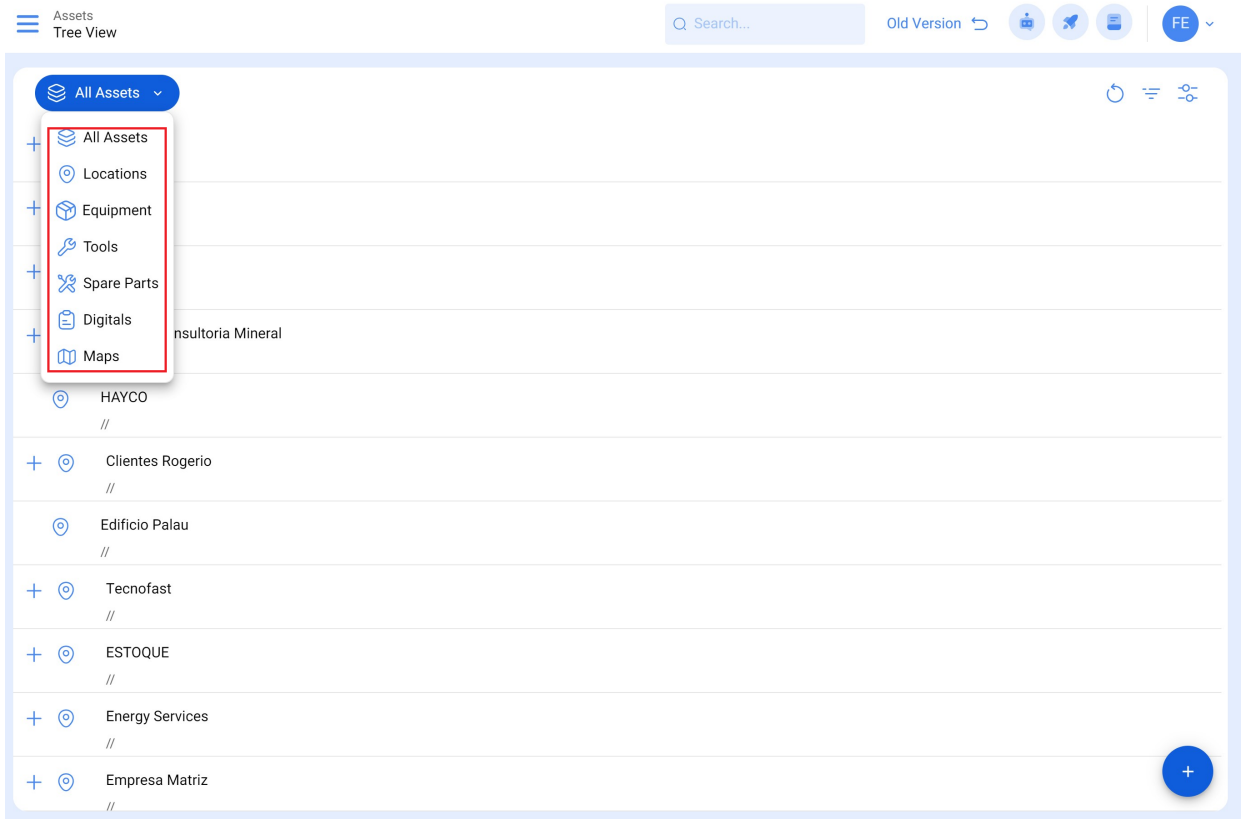
2. In the menu, select the "Catalogs" module.



3. select the active option.



4. Select the asset type where you want to set the custom form filter.



5. Select the filter option.

The screenshot shows the 'Equipos' (Equipment) management interface. At the top, there is a search bar and a user profile 'Fabían'. Below the search bar, there is a navigation menu with 'EQUIPOS' selected. A table lists various equipment items with columns for 'Habilitado', 'Fuera de servicio...', 'Descripción', 'Código', 'Nombre DEL EQUIPO', and 'Fabri'. A filter icon (three horizontal lines) is highlighted with a red box in the top right corner of the table area.

	Habilitado	Fuera de servicio...	Descripción	Código	Nombre DEL EQUIPO	Fabri
<input type="checkbox"/>	No	No	{ 0000-4 } MAQUET CRITICAL CARE VENTILADOR MECANICO	0000-4	VENTILADOR MECANICO	MA
<input type="checkbox"/>	Si	Si	{ 000-2 } MAQUET CRITICAL CARE VENTILADOR MECANICO	000-2	VENTILADOR MECANICO	MA
<input type="checkbox"/>	Si	No	{ 000-3 } MAQUET CRITICAL CARE VENTILADOR MECANICO	000-3	VENTILADOR MECANICO	MA
<input type="checkbox"/>	No	No	{ 001-01 } MAQUINA DE EMPAQUE	001-01	MAQUINA DE EMPAQUE	
<input type="checkbox"/>	Si	No	{ 001-02 } MAQUINA DE EMPAQUE	001-02	MAQUINA DE EMPAQUE	
<input type="checkbox"/>	Si	No	{ 001235 } Ford Carro	001235	Carro	Fon
<input type="checkbox"/>	Si	No	{ 01APO1001 } ANDRYZ TURBINA G1	01APO1001	TURBINA G1	ANI
<input type="checkbox"/>	Si	No	{ 01APO1002 } GOBERNADOR DE TURBINA	01APO1002	GOBERNADOR DE TURBINA	
<input type="checkbox"/>	Si	No	{ 05 } BEBEDOURO - JOÃO LUCAS	05	BEBEDOURO - JOÃO LUCAS	
<input type="checkbox"/>	Si	No	{ 1213 } MAQUINA PRINCIPAL	1213	MAQUINA PRINCIPAL	
<input type="checkbox"/>	Si	No	{ 1214 } Emerson Break principal Eafit Idiomas	1214	Break principal Eafit Idiomas	Emv
<input type="checkbox"/>	Si	No	{ 123123 } Vehiculo Consignaciones Bertolaza	123123	Vehiculo Consignaciones Bertolaza	

6. In the different options, look for the "custom form" box at the bottom.

The screenshot shows the 'Equipos' management interface with the filter panel open on the right side. The filter panel contains various options for filtering equipment, such as 'Fecha de Compra', 'Ubicado en ó es Parte de', 'Horas de uso promedio diario', 'Visible para todos', 'Plan de Tareas', 'Notas', 'Centro de costo', 'Presupuesto', and 'Formulario Personalizado'. The 'Formulario Personalizado' option is highlighted with a red box.

Visible para todos: TODO SI NO

Formulario Personalizado

BORRAR FILTROS APLICAR FILTROS

7. Search for the name of the custom form you have previously created.

The screenshot shows the 'Equipos' management interface. On the left, a table lists equipment with columns for 'Habilitado', 'Fuera de servicio...', and 'Descripción'. A search bar at the top right contains the text 'oper'. On the right-hand side, a sidebar displays details for the selected equipment, including 'Operario: Cristian Delgado', 'Cooperativa d'Ivars', and 'Datos de los operarios de la máquina'. A custom form titled 'Nombres de los operarios de máquina' is highlighted with a red box.

8. Select apply filters.

The screenshot shows the 'Equipos' management interface with the filter panel open. The filter panel includes fields for 'Ubicado en ó es Parte de', 'Horas de uso promedio diario', 'Visible para todos' (with 'TODO' selected), 'Plan de Tareas', 'Notas', 'Centro de costo', 'Presupuesto', and 'Formulario Personalizado'. The 'Formulario Personalizado' dropdown is set to 'Nombres de los operarios de máquina'. At the bottom of the filter panel, the 'APLICAR FILTROS' button is highlighted with a red box.

Scroll to the bottom of the interface and there you will find the filtered data.

The screenshot shows a web application interface with a blue header. The header contains a menu icon, the text 'Activos Equipos', a search bar with 'Buscar...', and a user profile 'Fabián'. Below the header, there is a sub-header with a dropdown menu 'EQUIPOS', a document icon, and the text 'Formulario Personalizado: Nombres de los operarios de máquina'. To the right of this sub-header, it says 'Mostrando 1 de 1'. Below the sub-header, there are two tabs: 'LISTA' and 'ÁRBOL'. The main content area is a table with the following structure:

costo...	Presupuesto	Url Código QR	Formulario Personalizado	Operario jornada AM	Operario jornada PM
)	EQUIPOS ()	https://app.fracttal.com/#inventories.equipments/30048728	Nombres de los operarios de máquina	Elkin Alfonso Montoya P...	Héctor Montoya

A red box highlights the table content. In the bottom right corner of the interface, there is a blue circular button with a white plus sign.