

O que são os formulários personalizados? – Centro de ayuda

 help.fracttal.com/hc/pt-pt/articles/25230165717133-O-que-são-os-formulários-personalizados

Os formulários personalizados permitem organizar os ativos em grupos, atribuindo campos ou etiquetas específicos a cada um. Estes campos podem ser criados e ajustados conforme as necessidades do utilizador ou do projeto, proporcionando uma estrutura mais eficiente para a recolha de dados.

Principais Características:

- **Campos personalizáveis:** a personalização dos campos é essencial para garantir que as informações recolhidas sejam precisas e relevantes para o negócio. Os utilizadores podem definir campos adaptados às suas necessidades específicas, permitindo a recolha de dados que são específicos e úteis para cada processo.
- **Flexibilidade nas etiquetas:** as etiquetas personalizadas são essenciais para organizar e filtrar dados de forma eficaz. Os formulários personalizados permitem a criação e atribuição flexível de etiquetas, o que melhora a busca e análise das informações dentro dos formulários.
- **Adaptabilidade aos processos de negócios:** ao personalizar os formulários, as empresas podem alinhar a estrutura dos dados aos seus processos específicos, garantindo uma recolha e análise de dados consistentes, que apoiam uma tomada de decisão mais eficiente.

Como criar um formulário personalizado para um ativo

1. No menu principal, selecione o módulo "Catálogos", depois clique em "Ativos".

The screenshot shows the Fracttal ONE software interface. On the left, there is a navigation sidebar with various modules: Start, Fracttal AI, Catalogs, Assets (highlighted with a red box), Inhouse Personnel, Third Parties, Warehouses, Work Management, Monitoring, Dispatcher, Business Intelligence, Cloud Disk, Requests, and Online help. The main dashboard features several cards and a donut chart. The cards include: Closed WOs (65), Pending Tasks with Delay (12), Compliance Percentage (67.7%), Work Orders (96, 65, 31), and Work Requests (17, 14). The donut chart is labeled 'Closed WOs'. At the top right, there are icons for AI, JC, and other system notifications.

2. Escolha o tipo de ativo onde deseja criar o formulário personalizado.

The screenshot shows a software interface for managing assets. At the top left is a 'Assets Tree View' button. A search bar contains the code 'PN02004Z'. To the right are several icons: a bell, a rocket, a document, an AI icon, and a 'JC' dropdown. On the left, a sidebar titled 'All Assets' is expanded, showing categories: All Assets, Locations, Equipment, Tools, Spare Parts, Digitals, and Maps. A red box highlights the 'All Assets' button. In the center, there's a blue icon of a computer monitor with a gear and a small number '6'. Below it, the text 'No data to show with these parameters' is displayed. A large blue circular button with a '+' sign is located on the right side.

3. Aceda ao ativo específico onde deseja configurar o formulário personalizado.

The screenshot shows a list view for equipment. At the top left is an 'Assets' button with 'Equipment' selected. A search bar contains the code 'PN02004Z'. To the right are icons for a bell, a rocket, AI, and 'JC'. Below, a 'List' tab is active, showing a table with columns: Enabled, Out of Service, Description, Code, Nombre, and Fabric. One row is highlighted with a red box, showing 'Yes' under Enabled, 'No' under Out of Service, 'PANEL ELECTRICO' under Description, 'PN02004Z' under Code, and 'PANEL ELECTRICO' under Nombre. At the bottom left, it says 'Showing 1 of 1'. A large blue circular button with a '+' sign is on the right.

4. Dentro do ativo selecionado, no menu lateral esquerdo, clique em "**Formulário Personalizado**".

The screenshot shows the 'Assets Equipment' section of the software. On the left, there's a sidebar with tabs: 'General' (selected), 'Custom Form' (highlighted with a red box), 'Health Status', 'Financial', and 'Third Parties'. The main area displays a card for an asset named 'PANEL ELECTRICO' with the identifier 'PN02004Z'. The card includes a QR code, a photo of the panel, and a status indicator 'Enabled'. A message says 'You have pending changes to save!'. The 'Custom Form' section contains various input fields: 'Fabricante' (Manufacturer), 'Modelo' (Model), 'NUMERO DE SERIE' (Serial Number), 'Otro 1', 'Otro 2', 'Barcode', 'Priority', 'Type', 'Group 1', 'Group 2', 'Supplier', 'Purchase date', 'Hours of average daily use' (set to 24:00), and a checkbox 'Visible to all'. There's also a 'Planned Maintenance' section with a gear icon.

5. Clique no retângulo abaixo do título "Formulário Personalizado" para começar a configurar o formulário.

PANEL ELECTRICO

Assets Equipment

Custom Form *

Out of Service: No

Enabled

Information
You have pending changes to save!

General

Custom Form

Health Status

Financial

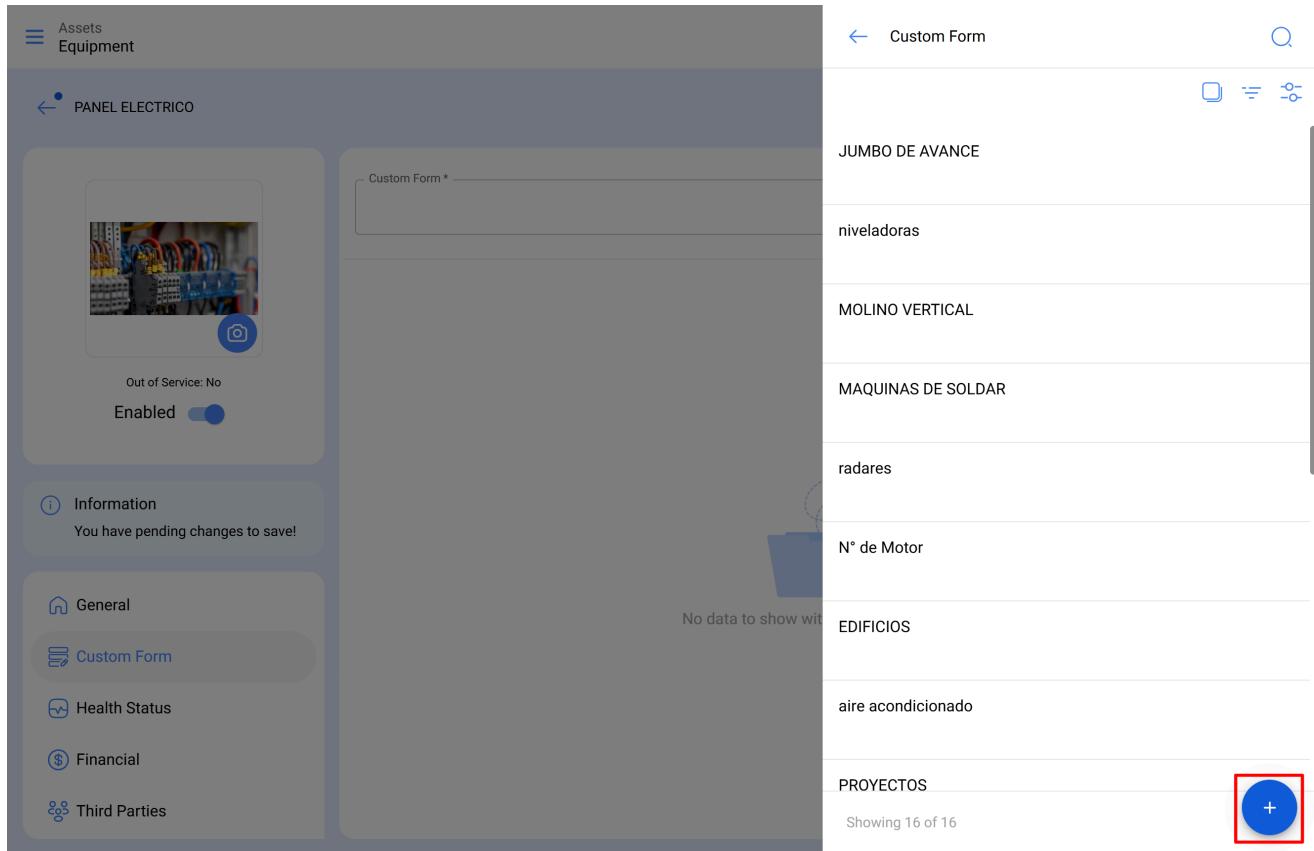
Third Parties

Save

JC

No data to show with these parameters

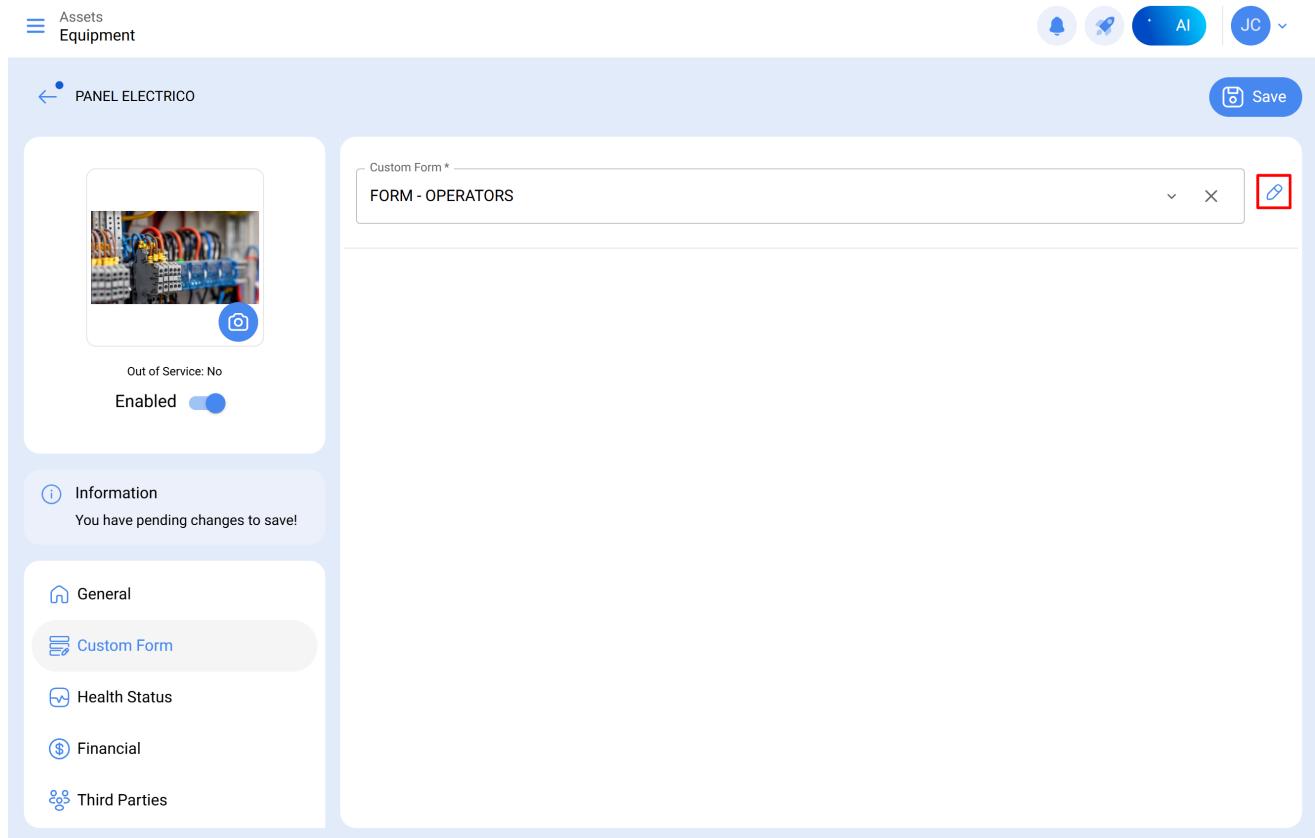
6. Clique no botão "+" no canto inferior direito da caixa.



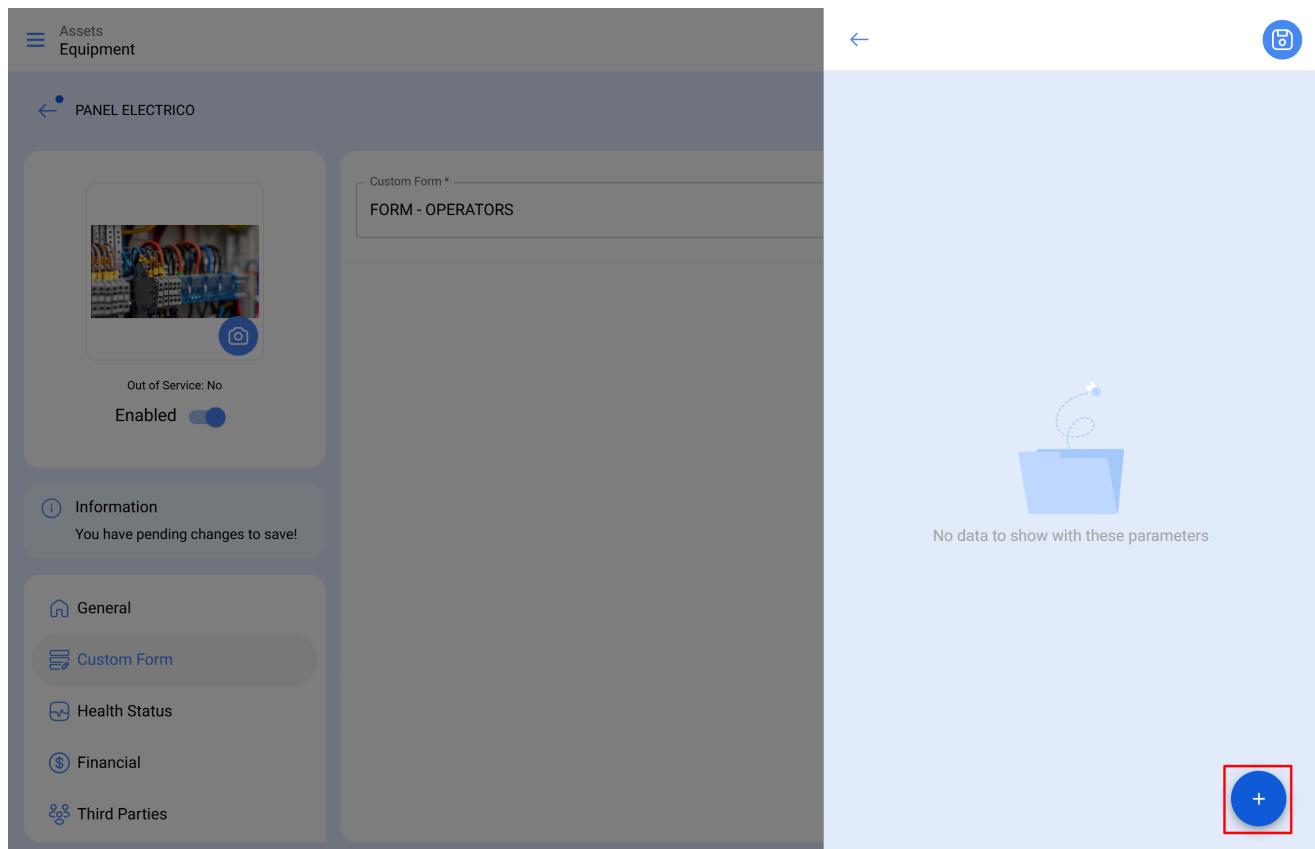
7. No campo de descrição, insira um título que reflita o propósito do formulário e depois clique em "**Guardar**".

The screenshot shows a software interface for managing assets. On the left, there's a sidebar with categories: Assets (selected), Equipment, PANEL ELECTRICO, General, Custom Form, Health Status, Financial, and Third Parties. The main area displays a card for 'PANEL ELECTRICO' with a thumbnail image of an electrical panel, a status indicator 'Out of Service: No', and a toggle switch labeled 'Enabled'. A message bubble says 'You have pending changes to save!'. On the right, a modal window titled 'Entrada de Texto' (Text Input) is open, showing a text input field labeled 'TITLE' with a red border around it. Below the input field is a toggle switch labeled 'Required'. The top right corner of the modal has a blue circular icon with a white edit symbol.

8. Para editar, clique no ícone de **Lápis** sobre o formulário criado.



9. Clique no símbolo "+" no canto inferior direito da caixa para adicionar etiquetas.

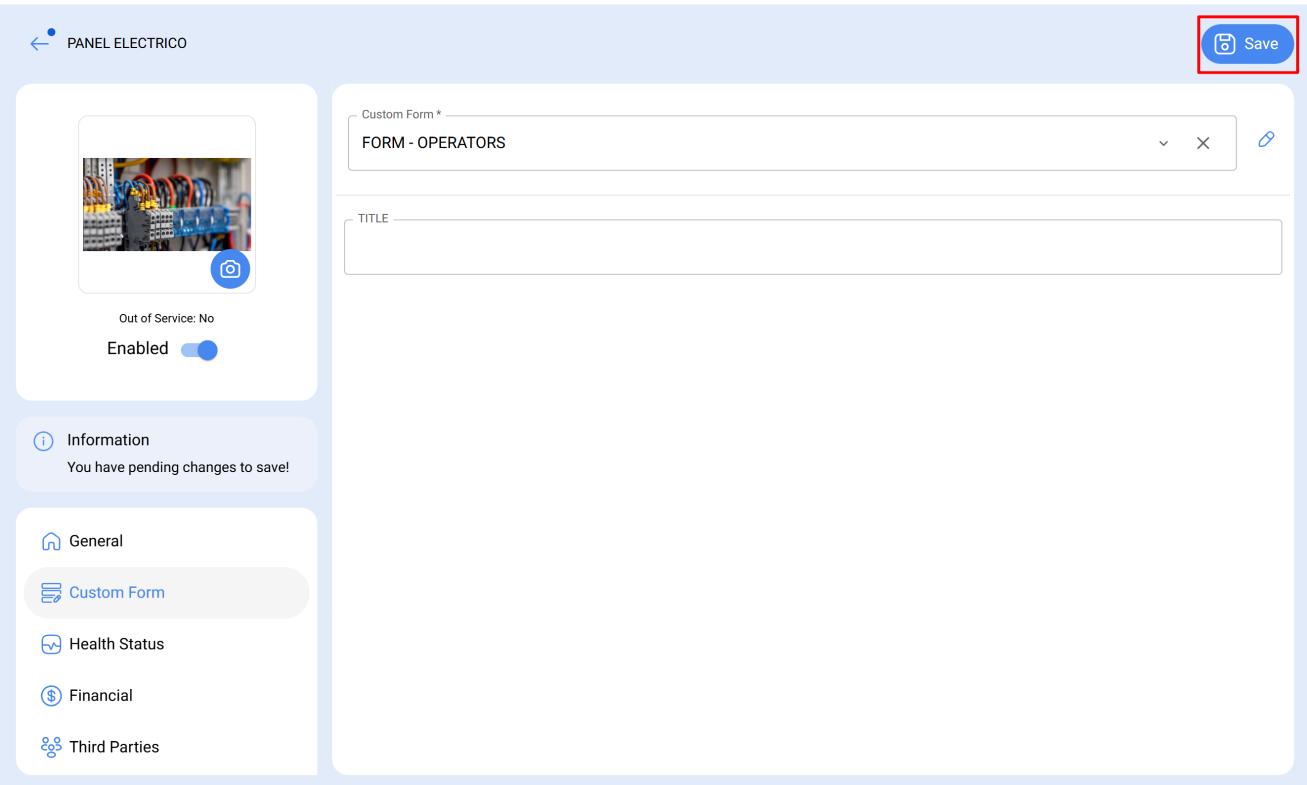


10. Insira um título que represente os dados que deseja capturar no formulário e clique em "**Guardar**".

The screenshot shows a software interface for managing assets. On the left, there's a sidebar with categories like Assets, Equipment, and a main panel titled 'PANEL ELECTRICO' showing a thumbnail of an electrical panel and status indicators ('Out of Service: No' and 'Enabled'). In the center, a 'Custom Form' is being edited, titled 'FORM - OPERATORS'. On the right, a 'Text Input' dialog is open with a 'Label' field containing 'TITLE' and a 'Required' toggle switch. A message at the bottom left says 'You have pending changes to save!'. The bottom navigation bar includes links for General, Custom Form, Health Status, Financial, and Third Parties.

11. Se desejar adicionar mais campos ao formulário, repita o passo anterior conforme necessário.

12. Por fim, clique em "**Guardar**" para registar as alterações feitas no formulário.



The screenshot shows a software interface for managing assets. At the top left is a navigation bar with 'Assets Equipment' and a back arrow. On the top right are icons for notifications, AI, and user profile ('JC'). Below the navigation is a header for 'PANEL ELECTRICO' with a back arrow and a 'Save' button highlighted by a red box. The main area contains a 'Custom Form *' titled 'FORM - OPERATORS'. It has a 'TITLE' field and other fields like 'Out of Service: No' and 'Enabled' (which is turned on). A sidebar on the left lists categories: 'Information' (with a note about pending changes), 'General', 'Custom Form' (which is selected and highlighted with a grey background), 'Health Status', 'Financial', and 'Third Parties'. The bottom right corner of the interface shows a page number '10/14'.

Após seguir estas etapas, terá criado com sucesso o seu formulário personalizado e registado as informações correspondentes.

Nota: As informações registadas no formulário personalizado podem ser usadas para filtrar e extrair dados conforme necessário.

Como filtrar um formulário personalizado existente

1. No menu principal, selecione o módulo "Catálogos", depois clique em "Ativos".

The screenshot shows the Fracttal ONE dashboard interface. On the left, there is a navigation sidebar with the following structure:

- Start
- Fracttal AI
- Catalogs (highlighted with a red arrow)
- Assets** (highlighted with a red box)
- Inhouse Personnel
- Third Parties
- Warehouses
- Work Management
- Monitoring
- Dispatcher
- Business Intelligence
- Cloud Disk
- Requests
- Online help

The main dashboard area displays various performance metrics and charts. At the top right, there are several icons: a bell, a rocket, a document, and two buttons labeled "AI" and "JC". Below these are dropdown menus for "Is part of" and "View".

Key data points visible on the dashboard include:

- Closed WOs:** 65
- Pending Tasks with Delay:** 12
- Compliance Percentage:** 67.7% (represented by a donut chart)
- Work Orders:** A bar chart showing values of 96, 65, and 81 for different categories.
- Work Requests:** A bar chart showing values of 17 and 14 for different categories.
- Other Metrics:** 37, 18, and an information icon (i).

2. Selecione a opção filtro.

The screenshot shows a list of equipment assets. The columns include Enabled, Out of Service, Description, Code, Nombre, and Fabric. The 'Enabled' column has two options: 'Yes' (green) and 'No' (grey). The 'Out of Service' column also has 'Yes' (green) and 'No' (grey) options. The 'Description' column lists various locations like 'A/A ALMACEN GENERAL', 'A/A AUDITORIA INTERNA', etc. The 'Code' and 'Nombre' columns show the same information as the description. The 'Fabric' column is partially visible. At the bottom left, it says 'Showing 200 of 516'. On the far right, there is a blue circular button with a '+' sign. The top right of the header has several icons: a search bar, a bell, a rocket, AI, and JC.

3. Nas opções de filtro, role para baixo e marque a caixa "Formulário Personalizado".

The screenshot shows the same list of equipment assets with the 'Filter' sidebar open. The sidebar includes fields for 'Search...', 'Hours of average daily use' (set to 00:00), and sections for 'Visible to all' (with 'ALL' selected), 'Planned Maintenance' (Search...), 'Notes' (Search...), 'Cost center' (Search...), 'Budgets' (Search...), 'Url QR Code' (Search...), and a 'Custom Form' dropdown menu. The 'Custom Form' dropdown is highlighted with a red border. At the bottom right of the sidebar, there are 'Clear Filters' and 'Apply Filters' buttons.

4. Pesquise o nome do formulário personalizado que criou.

The screenshot shows a search interface for a custom form titled "Custom Form". The search bar at the top right contains the query "FORM - OPERATORS". Below the search bar, there is a list of categories on the right side:

- EDIFICIOS
- EXCAVADORAS
- FORM - OPERATORS (highlighted with a red box)
- Generadores
- JUMBO DE AVANCE
- MAQUINAS DE SOLDAR
- MODULOS FV
- MOLINO VERTICAL

On the left, there is a table listing assets under the "Equipment" category. The columns are "Enabled", "Out of Service", and "Description". The "Description" column lists various locations such as A/A ALMACEN GENERAL, A/A AUDITORIA INTERNA, etc. The "Enabled" column has checkboxes, and the "Out of Service" column has dropdowns set to "No".

At the bottom left, it says "Showing 200 of 516". At the bottom right, it says "Showing 17 of 17".

5. Clique em "Aplicar Filtros" para realizar a busca.

This screenshot shows the same search interface after applying filters. The "FORM - OPERATORS" filter is still highlighted with a red box. On the right side, there are several filter sections:

- Visible to all: A button group for "ALL" (selected), "YES", and "NO".
- Planned Maintenance: Search bar.
- Notes: Search bar.
- Cost center: Search bar.
- Budgets: Search bar.
- Url QR Code: Search bar.
- Custom Form: A dropdown menu showing "FORM - OPERATORS" with a "X" icon to its right.

At the bottom right, there are two buttons: "Clear Filters" and "Apply Filters" (which is also highlighted with a red box).

On the left, the asset list and pagination remain the same as in the previous screenshot.

6. Role até ao final da interface para visualizar os dados filtrados com base nos critérios estabelecidos.

Assets
Equipment

Custom Form: FORM - OPERATORS

Equipment

List Treemap

Enabled	Out of Service	Description	Code	Nombre	Fabric
<input checked="" type="checkbox"/> Yes	No	PANEL ELECTRICO	PN02004Z	PANEL ELECTRICO	

Showing 1 of 1

Assets
Equipment

Custom Form: FORM - OPERATORS

Equipment

List Treemap

Cost center	Budgets	Url QR Code	Custom Form	TITLE
		https://app.fracttal.com/#inventories.equipments/45142530	Custom Form FORM - OPERATORS	

Showing 1 of 1