

Qu'est-ce qu'un formulaire personnalisé ? – Centre d'aide

 help.fracttal.com/hc/fr/articles/25230165717133-Qu-est-ce-qu-un-formulaire-personnalisé

Les formulaires personnalisés permettent d'organiser les actifs en groupes, en attribuant des champs ou des étiquettes spécifiques à chacun. Ces champs peuvent être créés et ajustés en fonction des exigences de l'utilisateur ou du projet, offrant ainsi une structure plus efficace pour la collecte des données.

Caractéristiques principales :

- **Champs adaptables** : La personnalisation des champs permet d'adapter la collecte des données aux besoins spécifiques de l'entreprise, garantissant que l'information soit précise et pertinente pour chaque processus.
- **Flexibilité des étiquettes** : Les étiquettes personnalisées facilitent l'organisation et le filtrage des données, améliorant ainsi la recherche et l'analyse de l'information dans les formulaires.
- **Adaptabilité aux processus métiers** : En personnalisant les formulaires, les entreprises peuvent aligner la structure des données sur leurs processus, garantissant une collecte et une analyse cohérentes qui soutiennent une prise de décision plus efficace.

Comment créer un formulaire personnalisé pour un actif ?

1. Dans le menu principal, sélectionnez le module "Catalogues", puis cliquez sur "Actifs".

The screenshot shows the Fracttal ONE software interface. The top navigation bar includes icons for AI, JC, and a search bar labeled "Is part of...". The main dashboard features several cards: "Closed WOs" (65), "Pending Tasks with Delay" (12), "Compliance Percentage" (67.7%), "Work Orders" (bar chart with values 96, 65, 31), and "Work Requests" (bar chart with values 17, 14). The left sidebar has a red arrow pointing to the "Catalogs" section, which contains "Assets" (selected and highlighted with a red box), "Inhouse Personnel", "Third Parties", "Warehouses", "Work Management", "Monitoring", "Dispatcher", "Business Intelligence", "Cloud Disk", "Requests", and "Online help".

2. Choisissez le type d'actif sur lequel vous souhaitez établir le formulaire personnalisé.

The screenshot shows a search bar at the top with the query "PN02004Z". Below it is a navigation bar with icons for bell, rocket, document, AI, and JC. A dropdown menu titled "All Assets" is open, showing categories: All Assets, Locations, Equipment, Tools, Spare Parts, Digitals, and Maps. The "All Assets" item is highlighted with a red border. In the center, there's a blue icon of a plant with a "6" on it, and below it, the text "No data to show with these parameters". A large blue circular button with a plus sign is located in the bottom right corner.

3. Accédez à l'actif spécifique où vous souhaitez configurer le formulaire personnalisé.

The screenshot shows a search bar at the top with the query "PN02004Z". Below it is a navigation bar with icons for bell, rocket, document, AI, and JC. A dropdown menu titled "Equipment" is open, showing "List" and "Treemap". The "List" tab is selected. A table displays asset information:

Enabled	Out of Service	Description	Code	Nombre	Fabric
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PANEL ELECTRICO	PN02004Z	PANEL ELECTRICO	
<input type="checkbox"/>	<input checked="" type="checkbox"/>				

At the bottom left, it says "Showing 1 of 1". A large blue circular button with a plus sign is located in the bottom right corner.

4. Dans l'actif sélectionné, dans le menu latéral gauche, cliquez sur "**Formulaire personnalisé**".

The screenshot shows the software's main interface for managing assets. At the top, there are navigation icons for Assets/Equipment, AI, and JC. Below the header, the asset name 'PANEL ELECTRICO' is displayed, along with its barcode and a save button.

The asset details include:

- Image:** A photograph of an electrical panel with various wires and components.
- Status:** Out of Service: No, Enabled (switch is blue).
- Identifiers:** PN02004Z
- Fields:** Fabricante, Modelo, NUMERO DE SERIE, Otro 1, Otro 2, Barcode, Priority, Type, Group 1, Group 2, Supplier, Purchase date, Hours of average daily use (set to 24:00), and Planned Maintenance.
- Checkboxes:** Visible to all (unchecked).
- QR Code:** A QR code labeled 'Public QR'.

The left sidebar contains a navigation menu with the following items:

- General
- Custom Form** (highlighted with a red box)
- Health Status
- Financial
- Third Parties

5. Cliquez sur le rectangle sous le titre "Formulaire personnalisé" pour commencer à configurer le formulaire.

The screenshot shows a software interface for managing assets, specifically a panel labeled "PANEL ELECTRICO".

Top Bar: Assets Equipment, Notifications, AI, JC.

Header: PANEL ELECTRICO, Save.

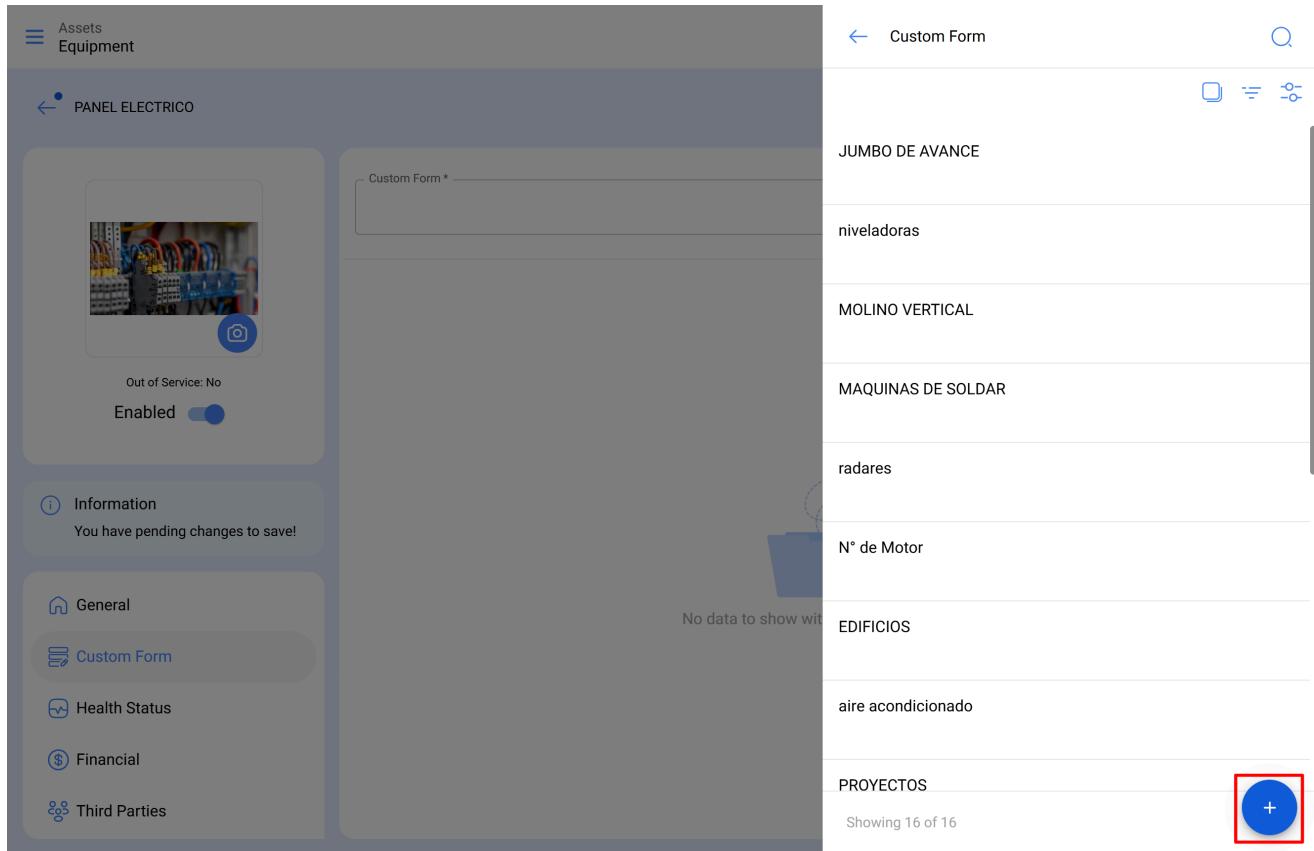
Left Panel:

- Image of the panel with internal wiring.
- Out of Service: No
- Enabled: Yes (switch)
- Information: You have pending changes to save!
- General
- Custom Form (highlighted in grey)
- Health Status
- Financial
- Third Parties

Right Panel:

- Custom Form * (highlighted with a red border)
- No data to show with these parameters (with a blue folder icon)

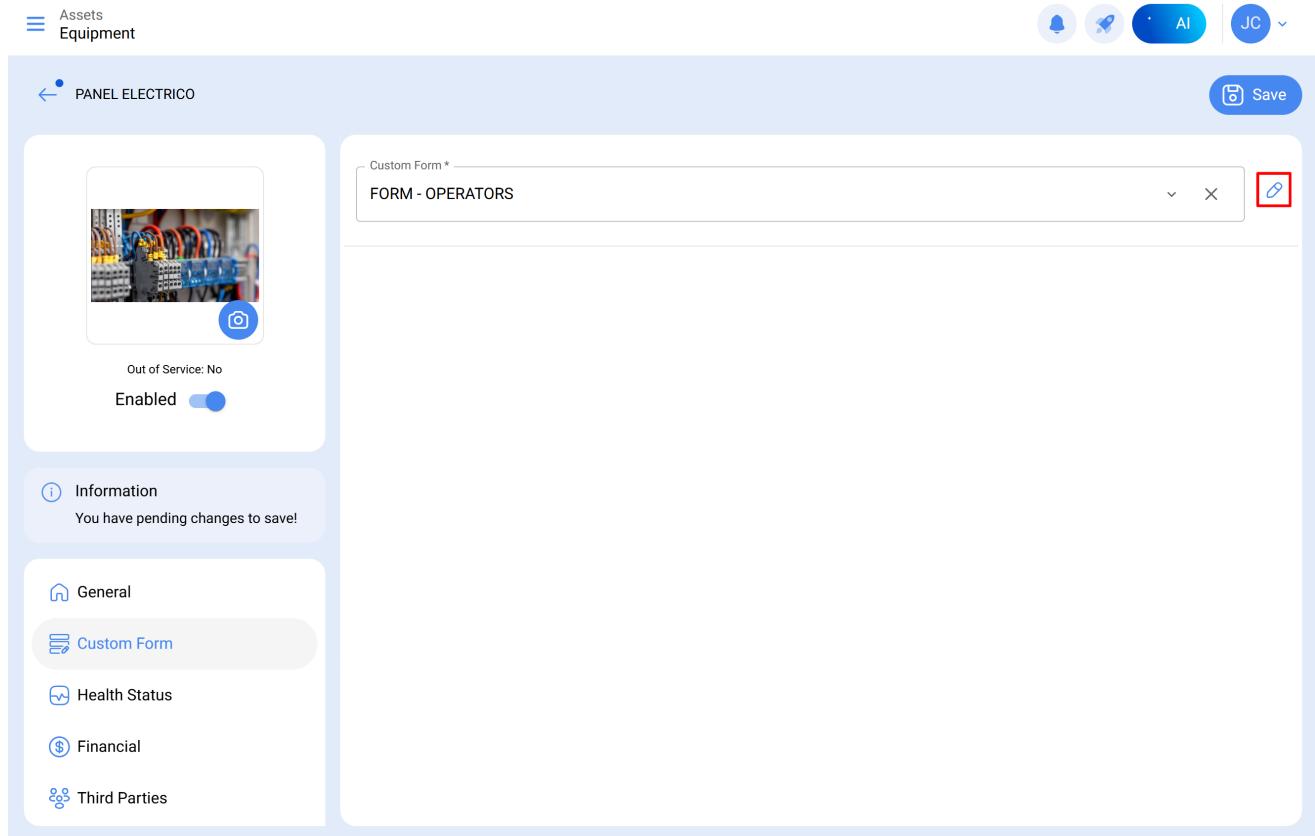
6. Cliquez sur le bouton "+" dans le coin inférieur droit de la boîte.



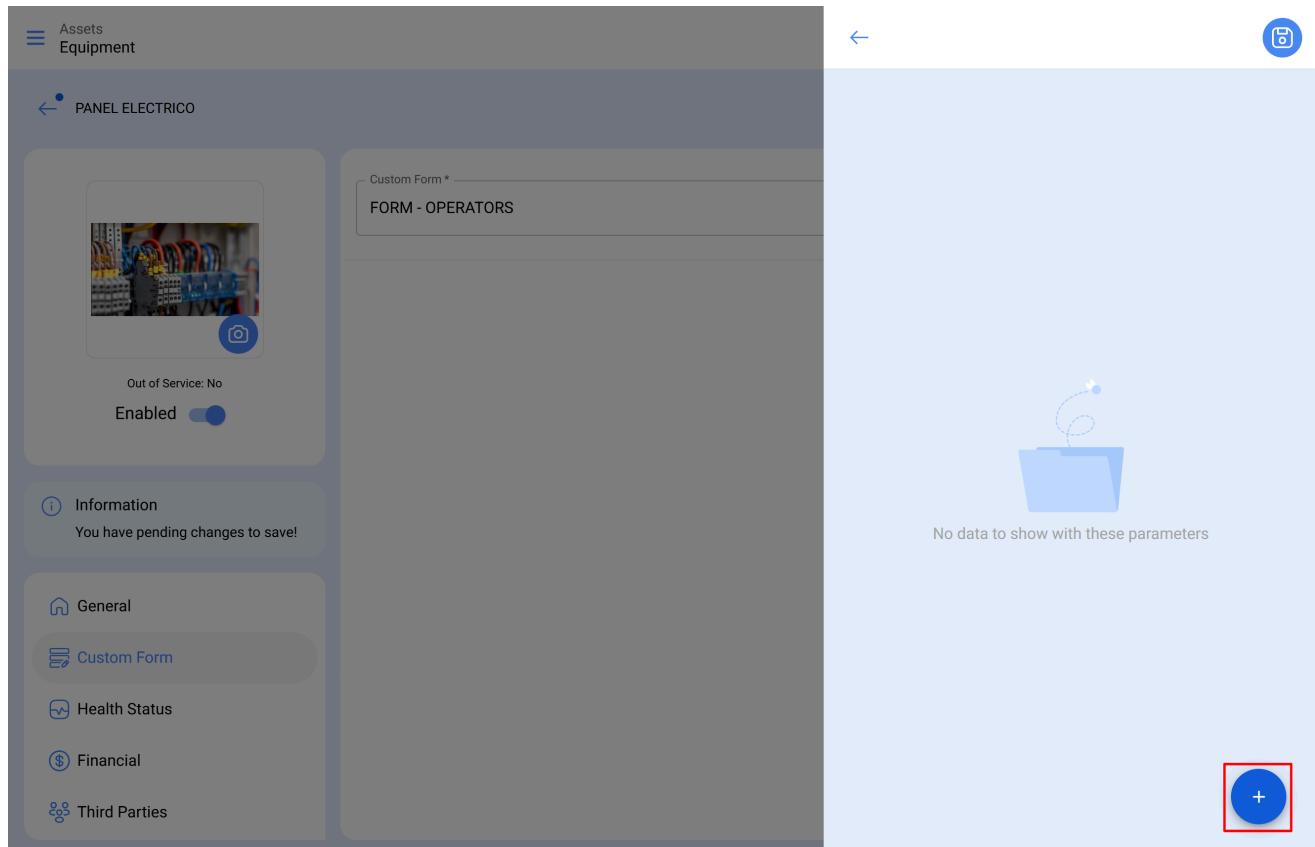
7. Dans la zone de description, entrez un titre qui reflète l'objectif du formulaire, puis cliquez sur "**Enregistrer**".

The screenshot shows a mobile application interface for managing assets. On the left, there's a sidebar with categories: Assets, Equipment, and a selected item labeled "PANEL ELECTRICO". Below this are sections for "General", "Custom Form", "Health Status", "Financial", and "Third Parties". A modal window titled "Custom Form * FORM - OPERATORS" is open on the right. Inside this window, there's a "Label*" field containing the text "TITLE", which is highlighted with a red border. Below the label is a switch labeled "Required". At the top right of the modal is a blue circular icon with a white edit symbol. At the bottom left of the modal is a message: "Information You have pending changes to save!".

8. Pour modifier, cliquez sur l'icône située sur le formulaire créé.



9. Cliquez sur le symbole "+" dans le coin inférieur droit de la boîte pour ajouter des étiquettes.

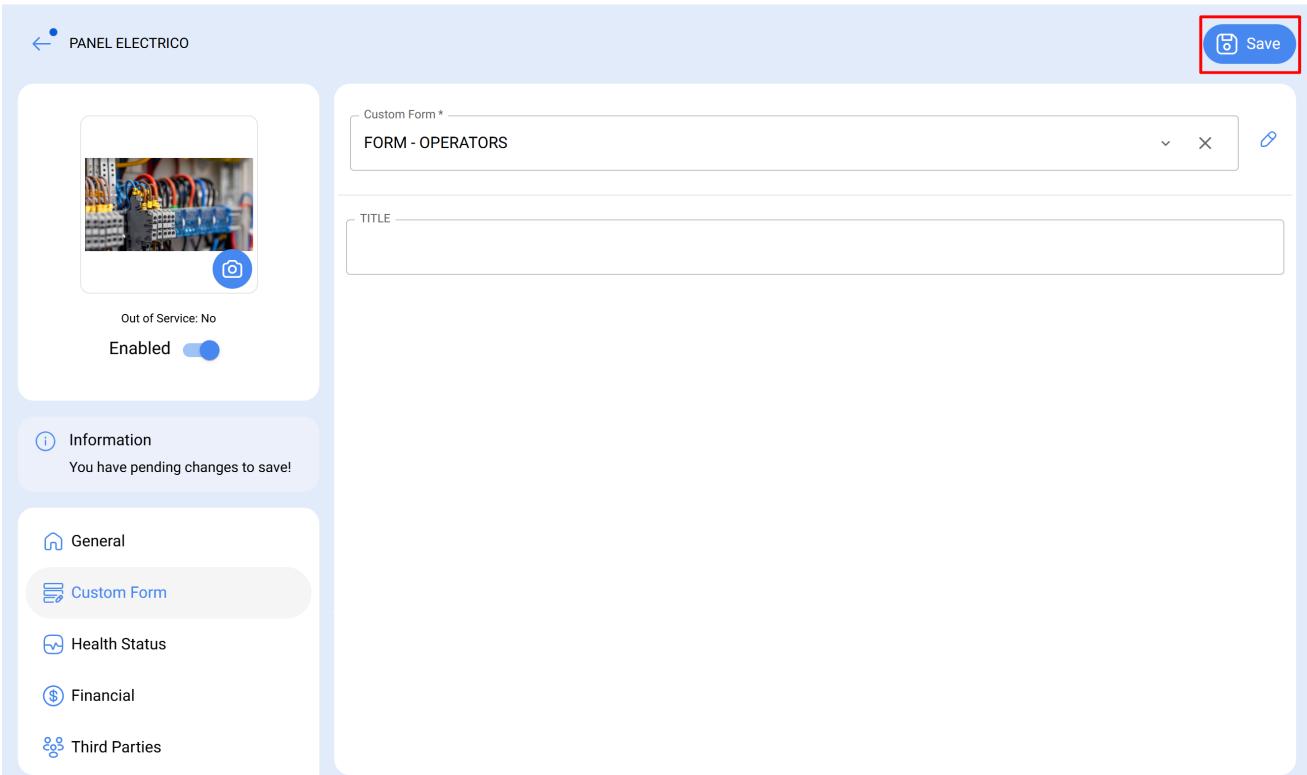


10. Entrez un titre qui représente les données que vous souhaitez capturer dans le formulaire, puis cliquez sur "Enregistrer".

The screenshot shows a mobile application interface for managing assets. On the left, there's a dark sidebar with navigation items: Assets, Equipment, 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 camera icon, and status indicators: 'Out of Service: No' and 'Enabled' (switched on). A message bubble says 'Information' with the text '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'.

11. Si vous souhaitez ajouter plus de champs au formulaire, répétez l'étape précédente selon vos besoins.

12. Enfin, cliquez sur "**Enregistrer**" pour enregistrer les modifications apportées au formulaire.



The screenshot shows a software interface for managing assets. At the top, there's a navigation bar with icons for Assets, Equipment, AI, and JC. Below the navigation is a breadcrumb trail: 'PANEL ELECTRICO'. On the right side of the header is a blue 'Save' button with a camera icon, which is highlighted with a red box. The main area contains a 'Custom Form *' titled 'FORM - OPERATORS'. There's a placeholder 'TITLE' field. On the left, there's a sidebar with sections for Information (warning: 'You have pending changes to save!'), General, Custom Form (which is selected and highlighted with a grey background), Health Status, Financial, and Third Parties. A thumbnail image of an electrical panel is also visible on the left.

Une fois ces étapes terminées, vous aurez créé avec succès votre formulaire personnalisé et enregistré les informations correspondantes.

Remarque : Les informations enregistrées dans le formulaire personnalisé peuvent être utilisées pour filtrer et extraire des données selon les besoins.

Comment filtrer un formulaire personnalisé existant ?

1. Dans le menu principal, sélectionnez le module "**Catalogues**", puis cliquez sur "**Actifs**".

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

- 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 "Search".

Key data points shown in 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.

2. Sélectionnez l'option de filtre.

3. Dans les options de filtre, faites défiler vers le bas et cochez "**Formulaire personnalisé**".

Assets
Equipment

Equipment

List Treemap

Enabled	Out of Service	Description	
<input type="checkbox"/>	Yes	No	A/A ALMACEN GENERAL
<input type="checkbox"/>	Yes	No	A/A AUDITORIA INTERNA
<input type="checkbox"/>	Yes	No	A/A BAÑOS COLABORADORES
<input type="checkbox"/>	Yes	No	A/A BAÑOS LOBBY
<input type="checkbox"/>	Yes	No	A/A BODEGA DE SECOS DE AZUL
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VERDURAS (COMEDOR)
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS FRIDA Y LUCCA
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS SENLIN
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 3
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 5
<input type="checkbox"/>	Yes	No	A/A BOUTIQUE

Showing 200 of 516

Filter

Search...

Hours of average daily use
00:00

Visible to all

All YES NO

Planned Maintenance
Search...

Notes
Search...

Cost center
Search...

Budgets
Search...

Url QR Code
Search...

Custom Form

Clear Filters Apply Filters

4. Recherchez le nom du formulaire personnalisé que vous avez créé.

The screenshot shows a search interface for 'Custom Form'. In the search bar, the term 'FORM - OPERATORS' is entered. Below the search bar, a list of categories is displayed: EDIFICIOS, EXCAVADORAS, FORM - OPERATORS (highlighted with a red box), Generadores, JUMBO DE AVANCE, MAQUINAS DE SOLDAR, MODULOS FV, and MOLINO VERTICAL. On the left, there is a detailed list of assets under the 'Equipment' category, showing columns for Enabled, Out of Service, and Description. The 'Enabled' column contains mostly 'Yes' entries. The 'Description' column lists various asset names like 'A/A ALMACEN GENERAL', 'A/A AUDITORIA INTERNA', etc. At the bottom left, it says 'Showing 200 of 516'. On the right side, there are several search filters: 'Visible to all' (with tabs ALL, YES, NO selected), 'Planned Maintenance' (Search...), 'Notes' (Search...), 'Cost center' (Search...), 'Budgets' (Search...), 'Url QR Code' (Search...), and 'Custom Form' (with 'FORM - OPERATORS' selected). A 'Clear Filters' button is at the bottom left, and a 'Apply Filters' button is highlighted with a red box at the bottom right.

5. Cliquez sur "Appliquer les filtres" pour appliquer la recherche.

This screenshot shows the same search interface as the previous one, but with filters applied. The 'Visible to all' filter has the 'YES' tab selected. The 'Custom Form' filter on the right also has 'FORM - OPERATORS' selected. The 'Apply Filters' button at the bottom right is highlighted with a red box. The rest of the interface is identical to the first screenshot, showing the list of assets and the search results for 'FORM - OPERATORS'.

6. Faites défiler jusqu'à la fin de l'interface pour voir les données filtrées en fonction des critères établis.

The screenshot shows a software interface for managing assets, specifically equipment. At the top left, there's a navigation bar with 'Assets' and 'Equipment'. A search bar is at the top right. Below the navigation, a blue button labeled 'Equipment' has a dropdown arrow, and a red box highlights the text 'Custom Form: FORM - OPERATORS' next to it. There are two tabs: 'List' (selected) and 'Treemap'. The main area displays a table with columns: 'Enabled' (checkbox), 'Out of Service' (checkbox), 'Description' (text), 'Code' (text), 'Nombre' (text), and 'Fabric' (text). A single row is shown, with the 'Enabled' column containing 'Yes' (green) and 'No' (grey), and the 'Description' column containing 'PANEL ELECTRICO'. The entire row is highlighted with a red box. At the bottom left, it says 'Showing 1 of 1'. On the right side, there's a blue circular button with a '+' sign.

This screenshot shows a detailed view of an equipment item from the previous list. The top navigation and search bar are identical. The 'Equipment' button is selected, and the 'Custom Form: FORM - OPERATORS' text is highlighted with a red box. The 'List' tab is selected. The main area shows a table with columns: 'Cost center' (text), 'Budgets' (text), 'Url QR Code' (text), 'Custom Form' (text), and 'TITLE' (text). The 'Url QR Code' column contains a URL: 'https://app.fracttal.com/#inventories.equipments/45142530'. The 'Custom Form' column contains 'FORM - OPERATORS', which is also highlighted with a red box. At the bottom left, it says 'Showing 1 of 1'. On the right side, there's a blue circular button with a '+' sign.