POWER OF CUSTOM DATA

Tyler Moore
CodeCAD
Calgary, Alberta, Canada

Who am I?

- Tyler Moore
- 12 years Cad manager
- 18 Years Oil and Gas
- Piping Background
- Former Autoplant & Smart 3D Administrator
- 2 Years at CodeCAD as Sales and Support Specialist

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What is "Custom Data"

- Custom data is any possible information that you can think of that can be applied to any object in the CADWorx Catalog or .Project file to allow for this custom information to be available for information for long descriptions, tracking information, progressing, reporting, etc.

- There are 2 types of custom data:

  - Catalog Data – Information that is applied directly to the component at the data table level.

  - Project data – Information that is applied to the spec level or Project level for use in that particular Project file.

Custom Data Dialog Explanation

- **Name**
  - This is the program keyword
- **Title**
  - This is the column title
- **Description**
  - This is a note field
- **Data Type**
  - Integers / Real (numbers only)
  - Text (Any text)
  - **List (multiple selections for pull down list)**
- **Required Input**
  - Are you required to input information
- **Default Value**
  - Any default text can be entered
- **Attach Field to Components**
  - Selecting this option allows for the custom data to show up in the model, including the database and bill of materials. If you attach the property to a component, you can turn that property off by opening the already added property and clearing the check box. Any new component drawn after that point does not contain the property.

New Field

Name:	MANUFACTURER
Title:	Manufacturer
Description:	Manufacturer
Data Type:	Text
Required Input:	No
Validation Rule	
Default Value:	Enter Manufacturer Name

☑ Attach Field to Components

OK   OK & New   Cancel   Help

Adding Custom Data in the Catalog

- There are 2 methods to add custom data to the catalog. You can add it at specific data table level

- Add Custom Data to all tables. You can select a group heading such as valves and add the custom field to all tables under the group.
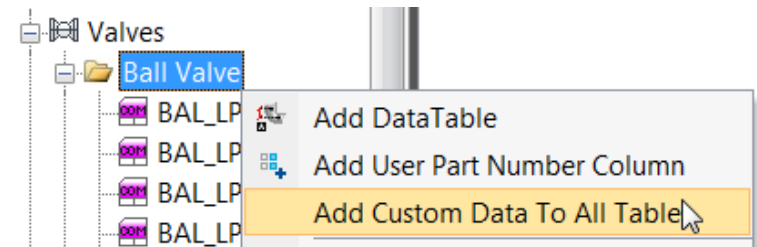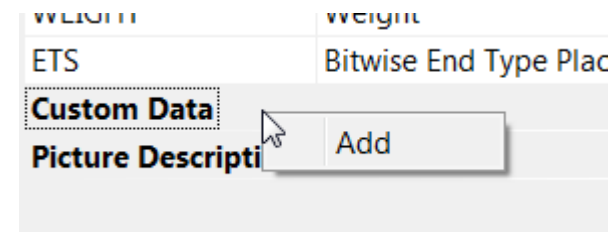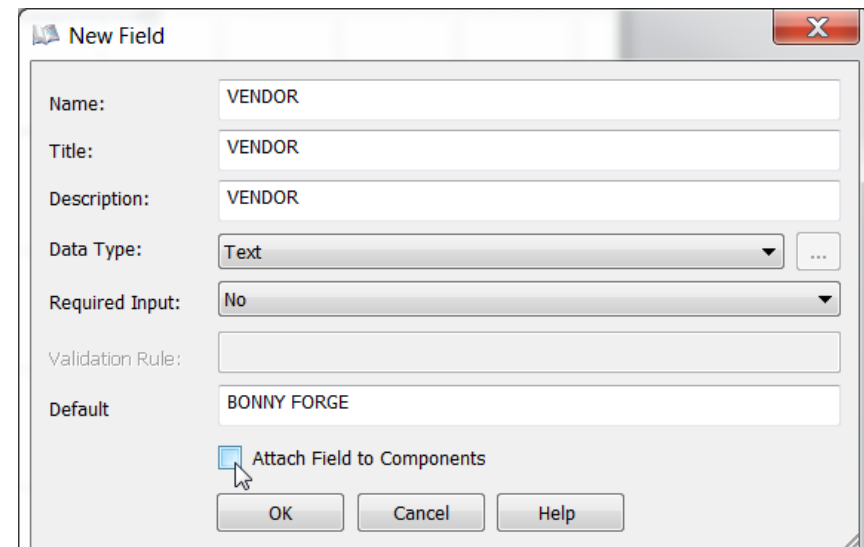
Adding Custom Data in the Catalog
Information only

- Example for information only
  - Adding a Vendor name to a Valve

- We will not attach the field to the component in this example. This is information only that is applied to this valve, to maybe show the vendor information that was used to build the data table.

- This can come in handy due to the discrepancies in some vendor small bore valves. Or if you have a need to have something very specific.

New Field

Name: VENDOR
Title: VENDOR
Description: VENDOR
Data Type: Text
Required Input: No
Validation Rule:
Default: BONNY FORGE

☐ Attach Field to Components

OK   Cancel   Help

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Adding Custom Data in the Catalog
Transfer to the models

- Example For tracking Long lead or SP Items
  - ☐ Sometimes we would like to see items or information in the model that are critical items to order, or maybe isolate the SP items. As example we have a special Gate valve that is a long lead item.

- We **WILL** attach the field to the component in this example. This is information will then carry across to the model, be able to be added to the BOM, and show in the Line isolate palette.

- I will also add a purchase status item as a list so that you can track in the model if the valve has been ordered or not.

New Field

Name:	LONGLEAD_STATUS
Title:	LONGLEAD_STATUS
Description:	LONGLEAD_STATUS
Data Type:	Text
Required Input:	No
Validation Rule:	
Default	Y

☑ Attach Field to Components

[OK] [Cancel] [Help]

New Field

Name:	PURCHASE_STATUS
Title:	PURCHASE_STATUS
Description:	PURCHASE_STATUS
Data Type:	List
Required Input:	No

2.0000
2.5000
3.0000
4.0000

E, RF, CL150

List Items

Item
Y
N

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Adding Custom Data in the Catalog
Transfer to the models

- **You have to add the valve to the spec now**

Adding Custom Data in the Catalog Transfer to the models

- When you place that valve in the model now it will show up in the line isolate pallet with the information that we applied with the attach to component option
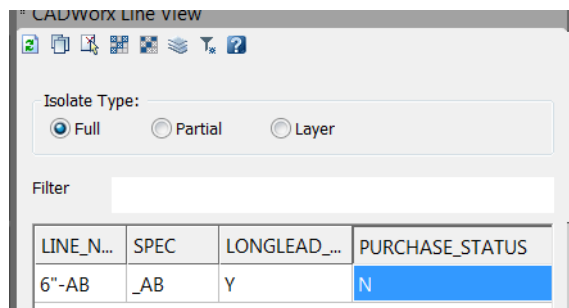
- When you double click on the component, and select the custom data button the information can be changed.

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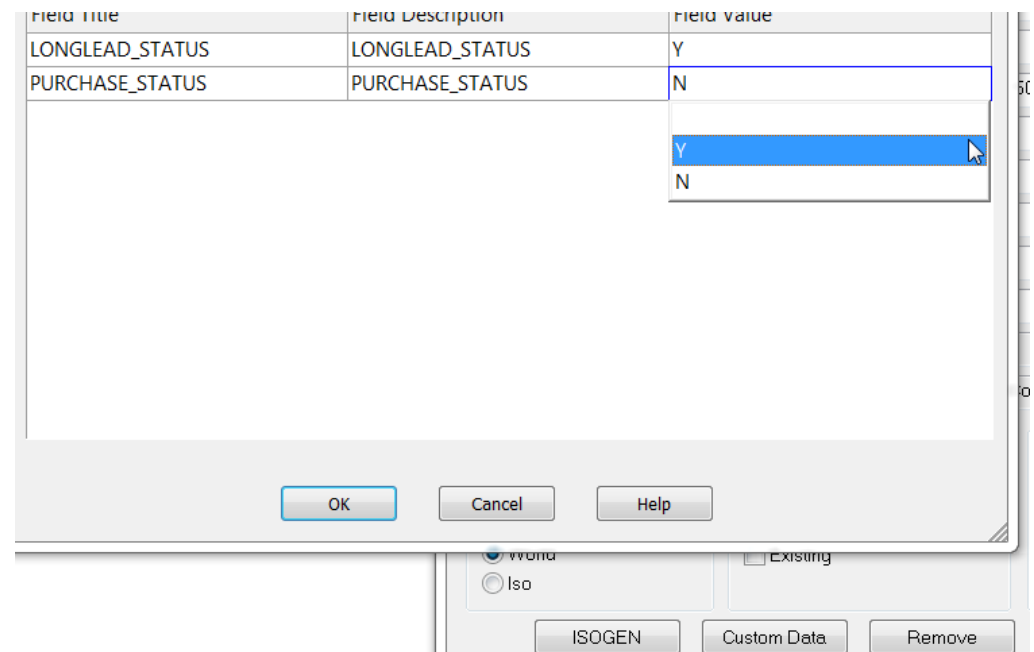
Other uses for Catalog Custom Data

■ Extra values for long description

Format	VENDOR_CMF_TBL, DESCRIPTION_CMF_TBL, SPEC_MAT_TBL

	0.5-1,1.5-5,4,6-20,24	SPECIALTY GATE VALVE, CL150
▷◁	0.5-1,1.5	BONNY FORGE, GATE VALVE, RED. PORT, SW, CL800, A105N

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Project and Spec Custom Data

- The power of the new custom data fields is really in the Project and spec side. You can use the custom data for creating status reports of your lines, tracking materials by module or work area, designers, etc. Basically anything you can think of can be added to the project file to be used.

- The most efficient place to put this kind of information is right at the Project level so it applies to all the specs.

Project and Spec Custom Data

- Adding at the Project level is done by highlighting the Project name and going to the Project file properties, custom data and adding there.
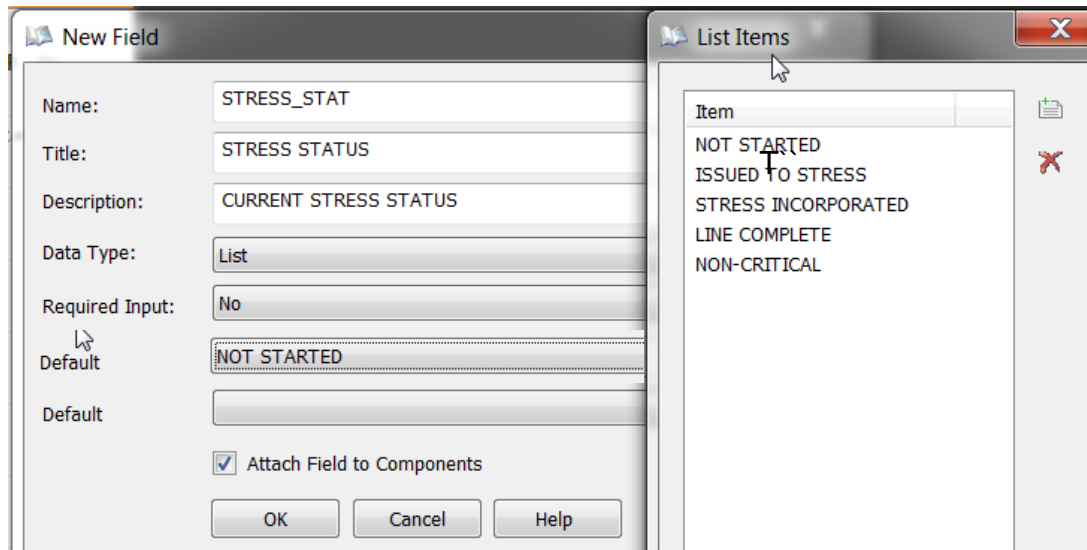
Project and Spec Custom Data Status Example

- **Stress Status:**
  - ☐ Add some criteria for the actual line status using the new list function. Set default to Not started

- When lines are drawn in the model they will now have the default of not started so that the designers need to select the status of the line as it goes through the process.

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Project and Spec Custom Data Status Example

- COMPONENT EDIT, CUSTOM DATA, STRESS STATUS; MODULE_ID, DESIGNER

- When lines are drawn in the model they will now have the default of not started so that the designers need to select the status of the line as it goes through the process.

- Using the line isolate and then the Gcedit function you can easily update the line status.

Updated Line View Palette

- You can now Isolate by Custom Data
  - □ All Custom data that is "Attached" to the components will show up as available information in the new Line isolate pallet.
  - □ You can also do compound selection for filtering.

Updated Line View Palette

- Isolation Settings File
  - Save as isolation file
  - Set constant isolation file in configuration file
- Save and recall Isolation Schemas
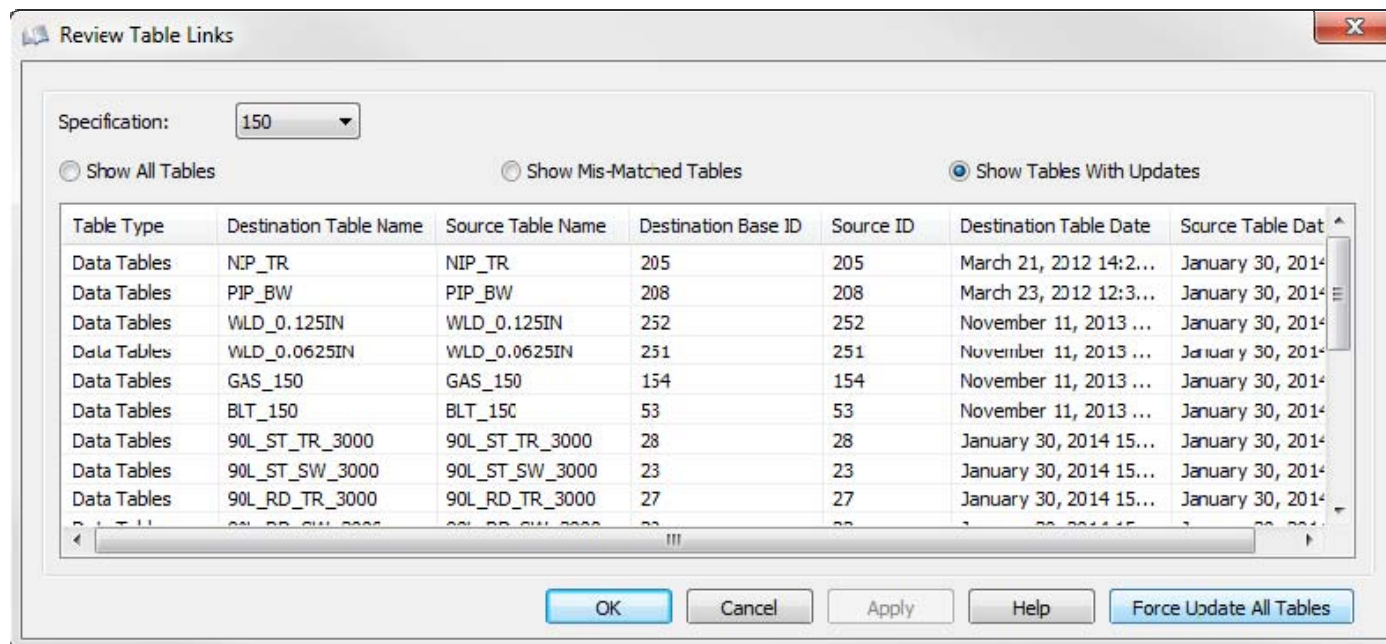
Custom Data in Bill of Material

- Custom Data in Bill of Material
    - All custom data fields are available for adding to the BOM export, as well as going into the database.
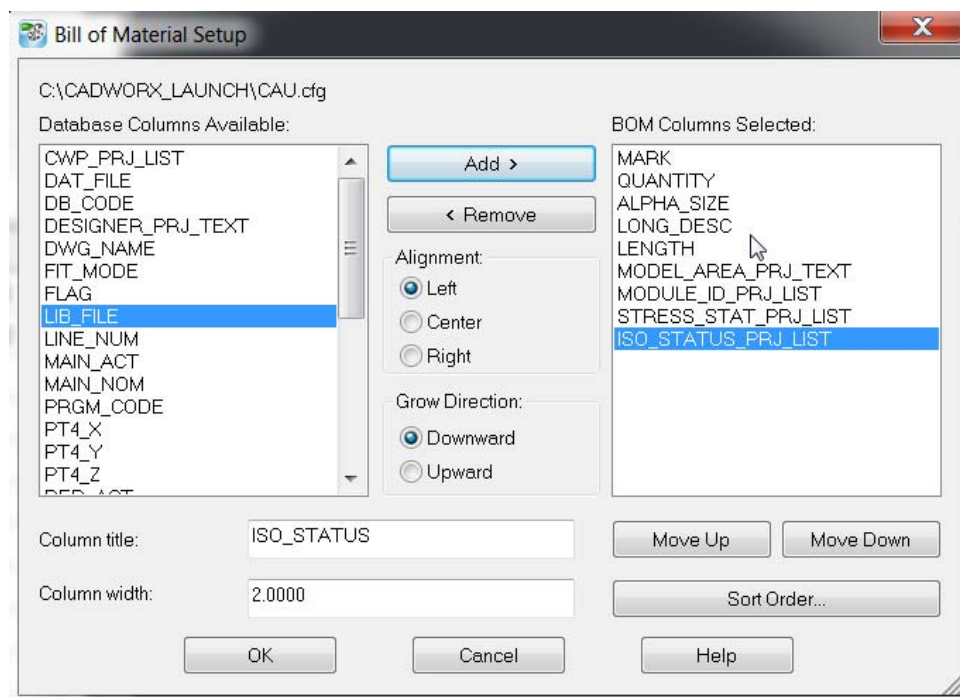
Tips

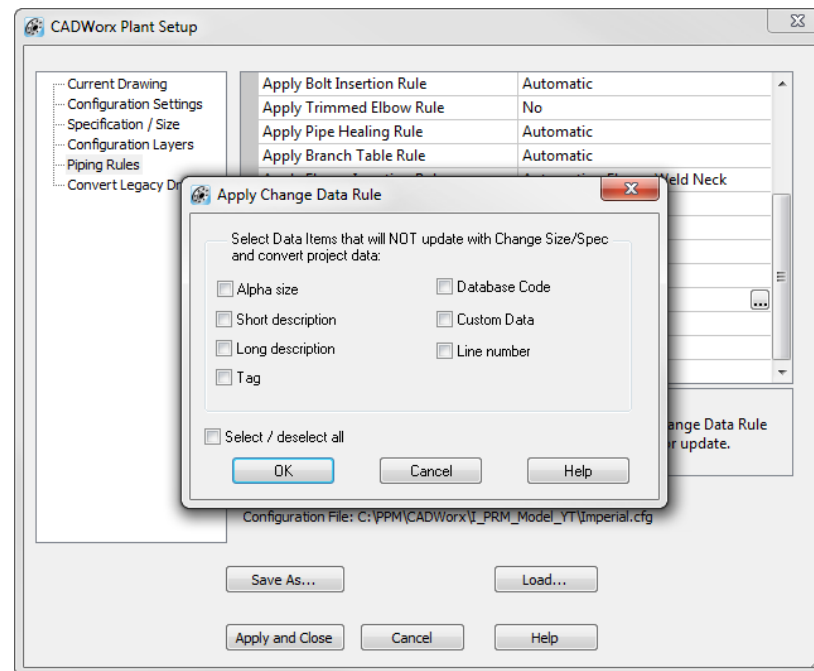- Force update will ensure all data is in your project specification

Tip

- Don't add 100s fields of custom data to components
- Component have size limits
- Drawings become large in size
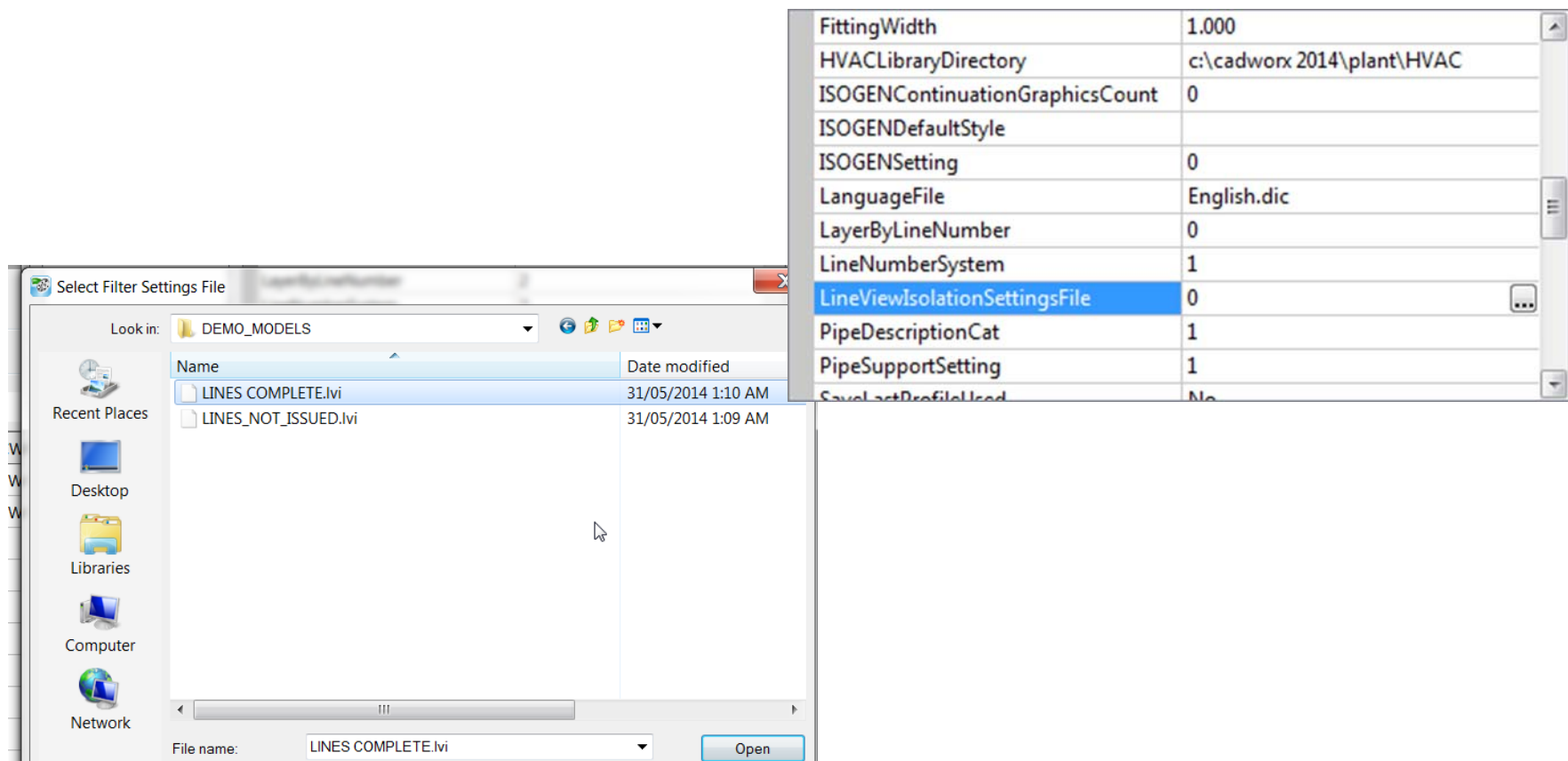
Tip
New fields from the catalog to the models

- **Apply Change Data Rule**
  - Control updates to custom data

Tip

- A defaults isolations filter file can be set in the configuration file

Questions

- That's a Wrap