

BIOSITE

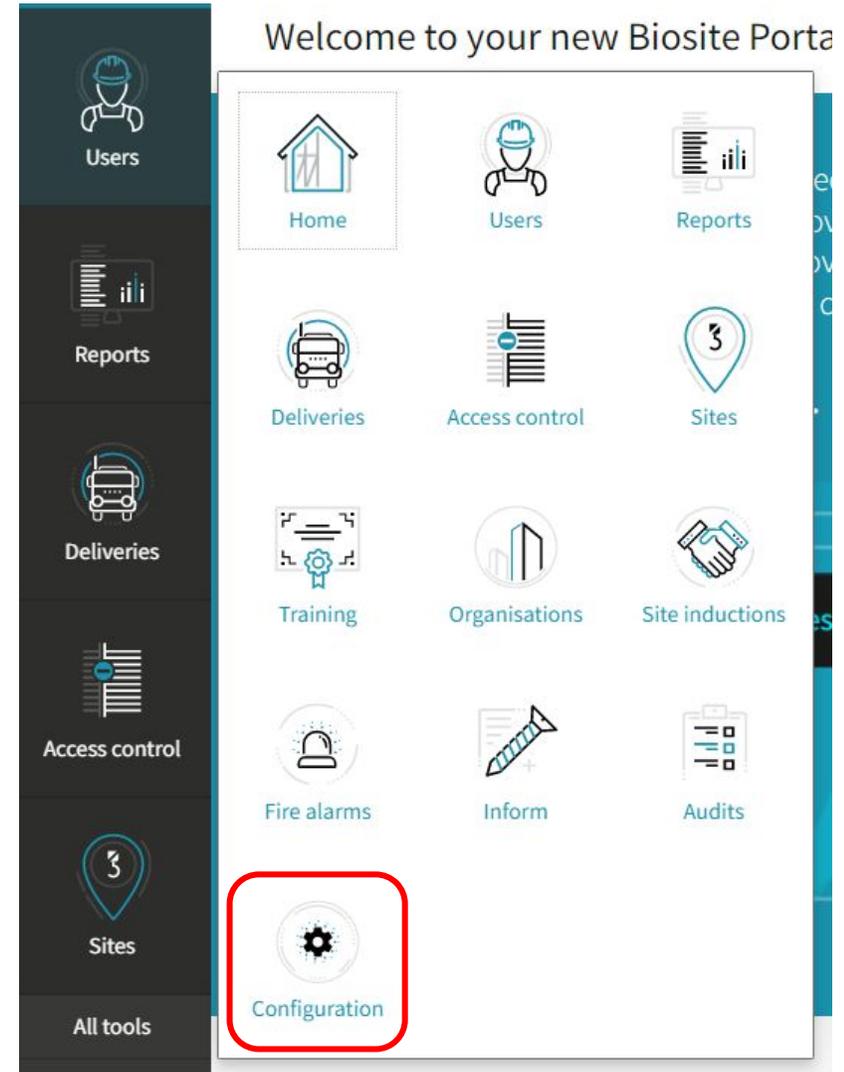
ASSA ABLOY

Site-specific custom field list options

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support@biositesystems.com

Navigate to Configuration

To add the Site-specific custom field list options you need to navigate to the **Configuration** button within the **All tools** section.



Navigate to Custom Fields

Select the **Custom Fields** tab from within the Operative Configuration section.

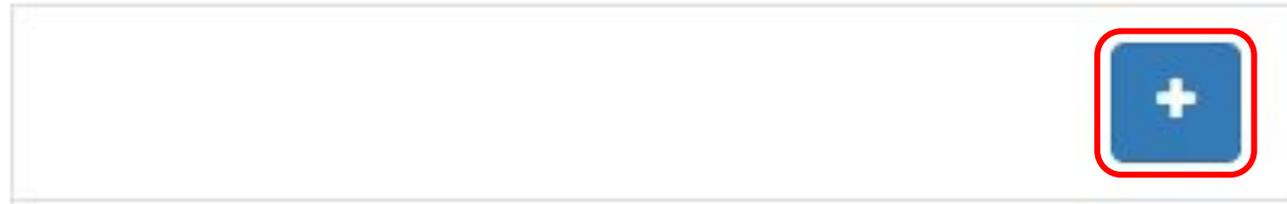
Operative Configuration Adjust how operatives' data is handled



Add New Custom Field

Add a new custom field, by selecting the + button.

Custom Fields



Enter Custom Field Name

Enter the name you would like to call the custom field. e.g. Trade

Name

Trade

This field may be used in some reports, do not change its meaning

Choose Custom Field Type

Select *Drop Down* from the *Custom Field Type* drop down menu.

| | |
|--------------------------|------------------|
| Custom Field Type | - choose -- |
| Sensitivity | Checkbox |
| | Date Input |
| | Drop Down |
| Slug | Message |
| | Postcode |
| | Text Input |

Add Custom Field Options

Click the + button to add custom field options. These options will appear later when you want to add them to a specific site.

Options

| + | |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Groundworker |   |
| Bricklayer |   |
| Scaffolder |   |
| Carpenter |   |

Switch on Site Specific Values

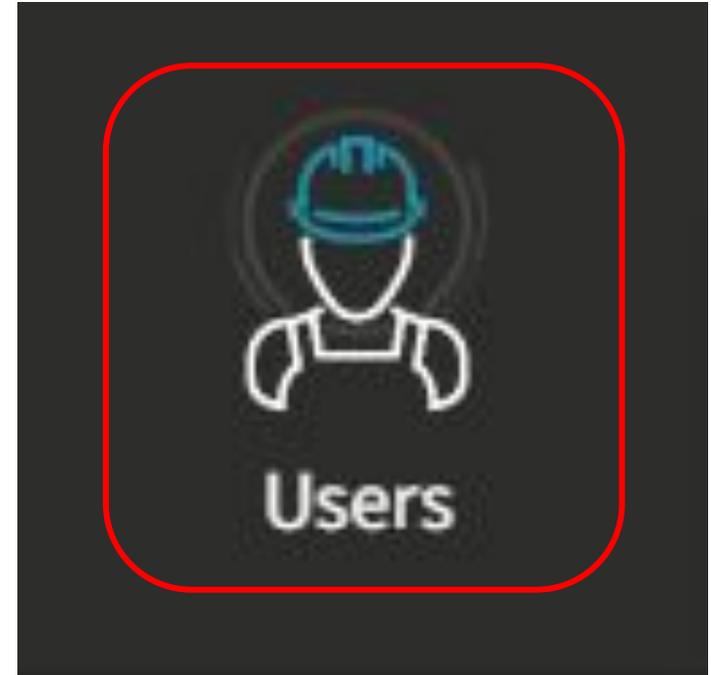
Scroll down and turn switch the button for **Site specific values** over to **Yes**. Once you are happy with all the content you have created, scroll to the top of the page and hit **Save**.

| | | |
|-------------------------|---------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Read only for operative | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | Prevents the operative from setting or changing the value. |
| Mandatory for everyone | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | Should all users be forced to fill this field in? If you wish to selectively force users to fill this in then use the options in the other tabs. |
| Automatic erasure | <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes | Automatically erase information when operatives are inactive. |
| Site specific values | <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes | Allows a different answer at each site. |

Please note this button cannot be switched over on existing custom fields, it has to be turned on at the point you create a new custom field.

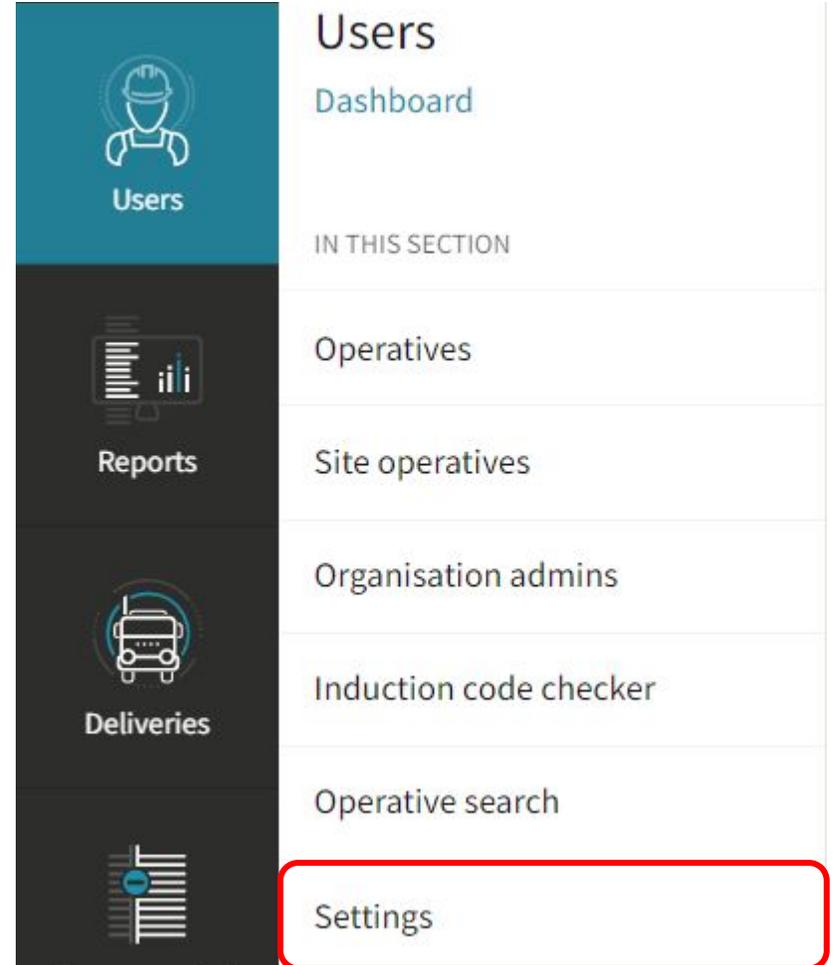
Navigate to Users

To add the Site-specific custom field to a specific site you need to navigate to the ***Users*** tab.



Navigate to Settings

Once you are in the users tab, select the **Settings** button.



The screenshot shows a vertical navigation menu on the left with four main sections: 'Users' (teal background), 'Reports' (dark grey background), 'Deliveries' (dark grey background), and an unlabeled section (dark grey background). The 'Users' section is active and contains a list of options: 'Dashboard', 'IN THIS SECTION', 'Operatives', 'Site operatives', 'Organisation admins', 'Induction code checker', 'Operative search', and 'Settings'. The 'Settings' option is highlighted with a red rounded rectangle.

| Users |
|------------------------|
| Dashboard |
| IN THIS SECTION |
| Operatives |
| Site operatives |
| Organisation admins |
| Induction code checker |
| Operative search |
| Settings |

Search for Custom Field

Search for the smart field you just created using the **Search** bar.

| NAME | TYPE | MANDATORY | SECTION |
|-----------------------|---------------|-----------|----------|
| First Name | Required text | Yes | Personal |
| Surname | Required text | Yes | Personal |
| First line of address | Text | No | Personal |
| Postcode | Postcode | Yes | Personal |
| Mobile Phone | Text | No | Personal |
| Trade | List | Yes | Personal |
| Is supervisor | Yes/No | No | Site |
| Supervisor name | Text | No | Site |
| Any health issues | Yes/No | Yes | Health |
| Heart Problems | Yes/No | No | Health |

64 smart field(s)

Select Custom Field

Select the custom field you just created.

Search 

| NAME  | TYPE  | MANDATORY  | SECTION  |
|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| Trade | List | Yes | Personal |
| Trade | List | No | No section |

Select Options

Select *Options* from within the *Field properties* section.

Field properties

All smart fields

 Trade

IN THIS SECTION

General properties

Options

Select Custom Field Options

Select custom field option you would like to allocate to a specific site.

Existing options for Trade

| OPTION | |
|--------------|--------------|
| Bricklayer | No rules set |
| Carpenter | No rules set |
| Groundworker | No rules set |
| Scaffolder | No rules set |

Select Site Availability

Select *Site Availability* from within the *Field response* section.

Field response

Smart field properties

Trade

Bricklayer

Response rules

Site availability

Select Let me Choose

To add the custom field to a specific site you will need to click on the **Let me choose** option, in the **Site availability** section.

Site availability

Sites to include

All

Let me choose

Select Site Specific Sites

Click the **Add** drop down arrow to Add a site for the custom field option.

| Selected sites | |
|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Add | <input type="text" value="Select a site..."/>  |
| Load all Clear all | |
| SITES | |
| No sites selected | |
| 0 sites | |

Select Site Specific Sites

The sites you have selected will show up in the list as soon as you have clicked on them. Once you are happy with sites you have selected, click the **Save** button.

Selected sites

Add ▼ [Load all](#) [Clear all](#)

SITES

| | |
|------------------|---------------------------------------------------------------------------------------|
| Drayton Road |  |
| London Road |  |
| Solihull Stadium |  |

3 sites

Permissions

If the custom field has not been set up with **Site specific values** turned on, this error message will display.

The screenshot displays the BIOSITE web application interface. On the left is a dark sidebar with navigation icons for Home, Users, Reports, Deliveries, Access control, Sites, and All tools. The main content area is titled 'BIOSITE' and includes a language selector (English (UK)) and a user email (sophie.mitchell@biositesystems.com). The 'Field response' section is active, showing 'Smart field properties' with a list containing 'Trade' and 'Administrator'. Below this is the 'Site availability' section, which displays an error message: 'The Trade field is not configured for site-specific answers. Making options available to selected sites is only available to smart fields that are configured for site-specific answers.' A 'Cancel' button is located in the top right of the error message box, and a 'Support' button is in the bottom right of the main content area.

Support

Biosite provide user support from 7.00am – 6.00pm Monday to Friday (exc. Public holidays)

Should you need help please contact our support team

0121 374 2939 (Option 1)
support@biositesystems.com

BIOSITE
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