



What are Field Associations?

Field associations on Custom Forms are used to change values on equipment items. This enables employees to update your equipment/assets directly from your custom forms.

When do you use Associations?

You'll know when to use an association when you see this image: 

You must set an association when you see this image or the form will not submit.

How to use Associations

1. Open the form you need to complete
2. Complete the fields as necessary
3. Fields that include  require you to associate that field with a piece of equipment.

*Length Cut Off: 

Ex: This Length Cut Off value must be linked to a piece of equipment

4. Click the . It will pull up a window (example below):

Select an Associated Cable Item ×

Submitting this form will trigger an update to an associated Cable item. Set that item here.

[Select an associated Cable item to continue](#)

Note: Once submitted, this item can't be changed.

5. Select the associated item from the available list in the window.
6. The button at the bottom will turn blue and say "Done". Click the button.
7. Complete the rest of the form as needed.
8. If form is finished, click "Complete".

(cont.)



To View the Updated Equipment:

1. Click "Equipment" on the left navigation.
2. Click "View Equipment".
3. Click the hamburger menu on the right under the category of equipment you want to view.

Search 2 Results 

Export 2 Results 



4. Click "View" for the equipment you wish to view.
5. The data of the equipment will be up to date.

If you wish to ensure a form was submitted and updated the data successfully:

1. With your equipment still open, scroll to the bottom. There will be a heading: "(Equipment) History".
2. Click the arrow on the right for the data set you wish to investigate.
3. You will see the history of the equipment's data.
 - a. When a field association causes an update on the equipment field, this column in the table displays the name of the form that caused the change, and the submission ID of the form.

Cable Length

VALUE	SUBMITTED BY	SUBMITTED AT	UPDATED AT
39850	Cable Usage Form: 7673	10/01/2019 - 04:10 PM EDT	10/01/2019 - 04:10 PM EDT
40000	Collin Reporter Pro	03/20/2019 - 10:53 AM EDT	03/20/2019 - 10:53 AM EDT

Note: This is only available if you have history enabled for the equipment field the form association exists on.