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Psiterra Knowledge Base Article

Forms & Attributes – Adding Custom Dropdown Values Lookup Tables in Siterra

Question:

I would like to add an additional option for the Project Status Dropdown. How can I do this?

Answer:

Lookup tables are core attributes in Siterra that contains a preselected list of values in a dropdown menu. The ability to modify these Lookup Table values requires Administration permissions.

In order to add additional options for a dropdown list, whether it is a project status or a lease type, the process is very similar.

First navigate to the Admin tab (1), and then click on "Look-Up Tables" (2) under the Customization section.



This will bring you to the following screen:

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Admin					
🏡 Admin Home 🛛 🐚 Ter	mplates 🔻 🥜 Custo	omization 🔻	Applications •	🚉 Hierarchies 🔻	🤣 Security 🔻
Lookup Tables					
Select Module: - Not Selected	- •				
	Table Name 🔺				
No Records Found					

Click the dropdown for "Select Module" (3), and observe the various different object types that have core Lookup values. Since this example demonstrates modifying Project Statuses, "Project" (4) is chosen in the image below.

Lookup Ta	blee			
elect Modul	C Not Selected			
	- Not Selected - Antenna			
	Asset Budget Changes	Table Name 🔺		
o Records Fo	un Budget Invoices Budget Purchases			
	Budgets Event Hub			
	Incident Invoice Lines			
	Lease Insurances Lease Space Usages			
ſ	Payments Project			

The next step is to locate the Lookup Table that you want to modify, and select it. In the below image, "Project Status" (5) is selected.

Admin	Applications •	🕄 Hierarchies 🔻	🍰 Security 🔻
Lookup Tables Select Module: Project			
Table Name A Project Status 5 Project Types Reason Codes		12/15/2006 12/15/2006 07/18/2009	

A new window will populate to allow for the modification. To add a new value to the dropdown menu, select "Add" (6). Then, you are able to name the value by imputing the name in the "Value" field (7). It is also available to provide a number in the "Order" field (8) which designates where the value is on the dropdown menu list. The *"Master Value" (9) section stipulates the behavior tied to the Lookup Table value. The "Color" option (10) changes the color that appears next to the project name on the Site

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homepage. Selecting the box for "Hidden" (11) will omit this selection for appearing in the Lookup table on an instantiated object. Once all changes are completed, select "Submit" (12) to save the information, and create the value.

Project Status Add * Value: Master Value: At least one Lookup Value must correspond to each Master Value at all times. Color: Co							
	Order 🔺	Value	Master Value	Additional Data	Hidden		
	0	Draft	Draft		Hidden		
	0	BW_Custom_Status_1	Active	•	 Image: A state of the state of		
	1	Active	Active	•			
	2	Closed	Closed	•			
	3	Archived	Archived	•			
	4	In Progress	Archived	•			
	10	Test	Active	•	1		
	11	TEST2		•			

*Note: some Lookup Tables will not have a "Master Value" section. If this is not available and you would like to create a Lookup Table value with a Master Value association, it may require a script and can be created for you as a paid effort by our Professional Services team.