Case Data

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Case data is a place to store any information you want against a material item. Case data has two purposes:

1. To support conditional flows, action conditions, expressions, etc. based on simple user entry of item related values (e.g. operator is asked: 'Do you want to continue or go to rework?').

2. For item-related information against items. Each case data item can store a single current value that can be used in reporting or history for that item (revision history is also available). Where there are several items, consider using checklists to reduce the burden of the admin of the data collection screens and to provide access to standard reporting.

Case data is useful to collect any type of information. For this reason it is very flexible and simple, but:

- The UI for collecting the values has to be manually configured.
- Out of the box reports are very limited – reporting of case data often ends up being custom.

Case Data Groups and Types

When you are setting up case data you need to configure case data type and case data group. These entities help you manage a large data set, potentially in configuration (if lots of case data exists) or in any subsequent reporting requirements (can be used as a filter in the system item genealogy report).

Examples of how you might use this information:

Groups:

- In process decisions
- Rework information
- Triage information

Types:

- Triage results
- Machine data checks
- Issue details

Case Data Configuration

Navigate to **Case Data** and click **New**.

New / Edit Case Data

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Used to identify the case data for subsequent configuration and reporting.
- **Data Type***: Sets a very basic validation of data that the user will enter for the item.
- **Case Data Type***: Select a case data type.
- **Data Group***: Select a case data group.
- **Default Value**: You can set a default value against this case data (although this would normally be configured in the workflow action).
- **Active***: Specify if this is available to be used for configuration or data storage.

Assign Products

Case data on its own is not usable, you need to specify which products it is applies to. If it is not assigned to a product, it will not appear as an option in configuration, e.g. in a workflow action.

1. Navigate to **Case Data**, select a case data and click the **Products** button.

2. Search for a product and click **Assign / Unassign**.