Configuration Labels

Planon Software Suite

Version: L105

Planon
Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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Configuration labels

Configuration labels enables Planon configurators to identify and export only the items that are affected by configuration.

Unlike **Configuration Transfer**, which includes all related software components, **Configuration labels** allows you to focus on the items that are actually changed, making the process lighter and easier to manage.

Configuration labels is meant to move configuration items between a DTA(P) street in your environment. As **not** modifying configuration in Production is a best practice, you can *only* enable **Configuration labels** in:

- Development
- Test
- Acceptance

You can - of course - import your configuration labels after validation into Production.

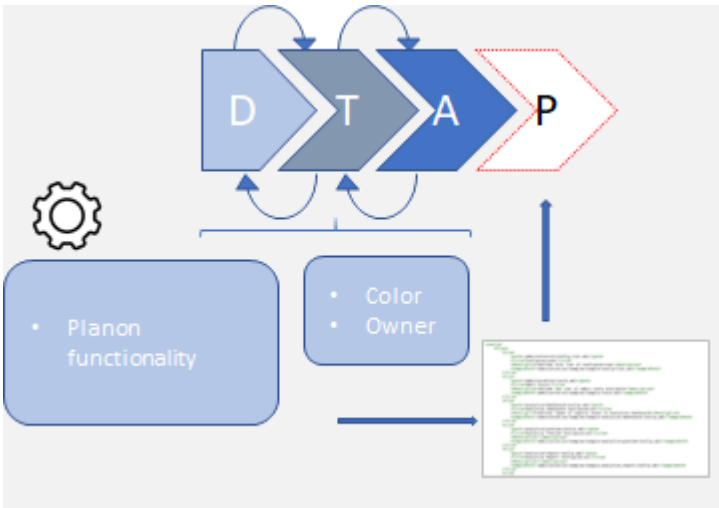
For a better understanding, we've created a short video on our Video Channel.

- **Configuration labels** is meant for developing and testing a configuration within an environment.

- **Configuration labels** is subject to licensing; ask your Planon consultant for more information.
- **Configuration labels** is subject to authorization; by applying authorization, you can determine who can use this feature.
- To export/import a configuration across environments outside of your DTAP street, we recommend using **Configuration Transfer** instead.

Process

Configuration labels involves the following process:



1. In System Settings > General, enable configuration labels.
2. In **Configuration labels**, create a configuration label (color and owner) and set it to **Active**.
3. Changes made to configuration elements are logged.
4. In **Configuration Transfer**, export the label. A configuration summary is available and can be downloaded.

Configuration labels can be applied to:
- Field Definer
- Reports & forms
- Layouts
- Navigation groups
- Alerts
- TSIs
- Enterprise Talk
- SDI
- External data storage
- Standard orders
- Questionnaires
- Authorization (user groups, accounts, function profiles, ProCenter action filters, authorization links)
- Attributes
- (System) settings
- Web services
- Approval conditions & definitions
- PSS forms and site

For specifics about these items, see Good to know.

5. Validate and import your label in a next environment (via **Configuration Transfer**).
6. Resume testing until, finally, you can import your configuration into Production by using **Configuration Transfer**.

You can automatically remove completed records by creating an action definition in the Alerts TSI on Configuration transfer- and Configuration label definitions. After creating a meaningful filter, for example on the status of the BO definition, the completed records can automatically (scheduled) be deleted.

Good to know

This topic describes remarks/restrictions concerning labeling.

Module	Remarks
Enterprise Talk	• External storage locations are excluded from labeling. Import analysis and logging will list this as an item requiring attention. A message will clarify that the user must transfer the system setting external data storage or configure it manually in the target environment and link it to the Enterprise Talk definition. • User-defined business objects must be available in the target system otherwise the import will be blocked. • Custom import/export workers must be available in the target system, or the import will be blocked.
TSIs	When any of the following items is used/applied on a TSI, Labeling will take it over: • Selection step filters • User filters • Customizable lists • Selection step groups As a result, these items will be present in the export and import analysis reports.
Layouts	Labeling will only take over the 'layout', the 'navigation actions' and their subsequent translations.
SDI	The current export/import for SDI only takes over the template, not the filled data sheet.
Standard orders	• Questionnaires and the related questions and answers are labeled.

Module	Remarks
	• Links (to asset groups, properties, space categories) are shown as dependencies. • If a linked user group is not present in the target. environment, this is flagged as a dependency conflict. • The standard order hierarchy (subs, lines, costs, ...) is labeled. • Reference fields to data are mentioned in the import analysis when missing in the target environment. The following issues are blocking: ◦ A mandatory field is missing in the target environment. ◦ A mandatory field is not in use in the target environment. ◦ When fields are not of the same type. • Standard order is labeled when linking a m-n standard order with a questionnaire.
Questionnaires	• When a questionnaire is linked to a standard order, this too is labeled and exported. • The questionnaire 'hierarchy' is included (sub-questionnaires, questions, answers). • Questionnaire is labeled when linking a m-n standard order with a questionnaire. • For Standard gateways: ◦ Questionnaire and Question are labeled independently when a corresponding field is filled on a gateway: ▪ When a **Questionnaire** field is filled, label Questionnaire. ▪ When a **Question** field is filled, label Question. ◦ When an Answer option is filled on Standard sequence flow, label corresponding Question on gateway.

Module	Remarks
	• The QQ code system has been adapted to accommodate changing the QQ names to make it easier to transfer questionnaires, questions and their answer options between systems. When a question is linked to a questionnaire, the (M-to-N) table with the link gets filled with a generated QQ code. This QQ code is then used in PSS2 for identifying the questions from the questionnaire that can be linked to a PSS2 form. However, when exporting and importing PSS2 forms into a target system, the QQ codes must exactly match with the source system otherwise the questions will not be added to the PSS2 form, and related functionality (such as dynamic behavior) would be erased.
User groups	• Users & User settings linked to the user group will be labeled. • Linked Solution licenses, Product definitions are labeled. • When linked, function profiles and standard orders are mentioned as a dependency
Users	• The user's password will NOT be taken over in the export. New accounts will get the default password; the password of existing users will remain as is in the target environment. The password is encrypted and cannot be decrypted. • Users whose data is anonymized due to GDPR are not included in the label. • Data references (email, language, property set, linked persons) are mentioned in the impact analysis.

Module	Remarks
	• Linked user groups will be labeled and taken over as well as the Solution licenses, Product definitions.
ProCenter action filters	• The filter is labeled and included only when linked to a ProCenter filter. • User groups linked to a ProCenter action filter are also labeled.
Function profiles	• Any change to **BO rights** results in labeling the function profile. • The Fields, Actions, Status transitions, and Extended actions referred to in **BO rights** are regarded as data references; these are not labeled in Field Definer.
Attributes	• Includes attribute sets and its details • Does not include assets and standard assets linked to attributes; these are considered data that can be transferred by using Enterprise Talk.
(System) settings	This includes the following System Settings: • Alerts settings • Connect for Outlook • External data storage • File locations • General • Improved features • Outgoing email • Reporting • Security • Web application Other settings: • Performance logging • Authorization settings (Authorization on/off and ProCenter filter on/off) • Approved messages • PMFS system settings

Module	Remarks
	• CI/Graphical assets viewer • CAD Integrator **Specifics** • Data panels are not included • Cloud settings will be read-only • Some settings may cause a cache refresh (File locations)
Web services	To pass validation, make sure that: • Linked (UD)BOs are present in the target system. • Linked fields are present and enabled in the target system. The actions that are available on the generated web service are determined by the configuration of the base layout of that business object, in combination with the **For use in pop-up** setting which has to be set to true on that base layout. If the same layout is configured differently in the target, generating the web service in the target would lead to a different generated web service.
Approval conditions & definitions	• The link between contract and approval definition will not be labeled. • Linked business objects/fields must be available in the target system. • Linked fields determine which fields can be filtered on. • New conditions can only be added if the approval condition is not active yet.
PSS forms and site	**Sites** • Typically, PSS forms are site-specific. Sites will only be labeled when they are added or changed. • A site's underlying structure is not labeled, unless these definitions are themselves labeled. • Deleting a site is not tracked. • When a web definition is labeled, its site is not labeled. However, the

Module	Remarks
	information is added to the export summary (for import). **References** • Web definitions can reference other definitions. These are mentioned but not labeled unless these themselves have been changed/added. • Referenced elements must be present in the target environment. **System images** • System images linked to a web definition are labeled/included in the export. **JavaScript and CSS** • Custom JavaScript and CSS that is applied via a file reference on the server will be mentioned in the import/ export analysis. **Status and status link** • When a status is linked to a web definition, it is not labeled, but its dependency is mentioned in the export/import. **Fixed filters** • If not part of the web definition XML, fixed filters will be taken over in the export/import. **Upload block** • When a UDBO communication log type is not available in the target, this is listed as a conflict.

Understanding the labeling hierarchy

Configuration elements in Planon do not stand on their own. Typically, these elements are part of an hierarchy or tree structure whose elements are also affected when an element is labeled.

How labeling affects elements

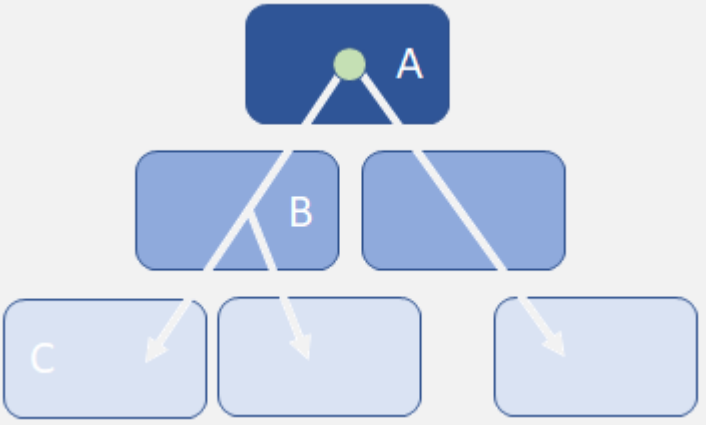
In **Configuration labels**, elements are labeled only on an as-needed basis. By limiting the number of configuration elements, efficiency and performance can be maintained.

On business objects, you can apply labeling at three levels (top-down):

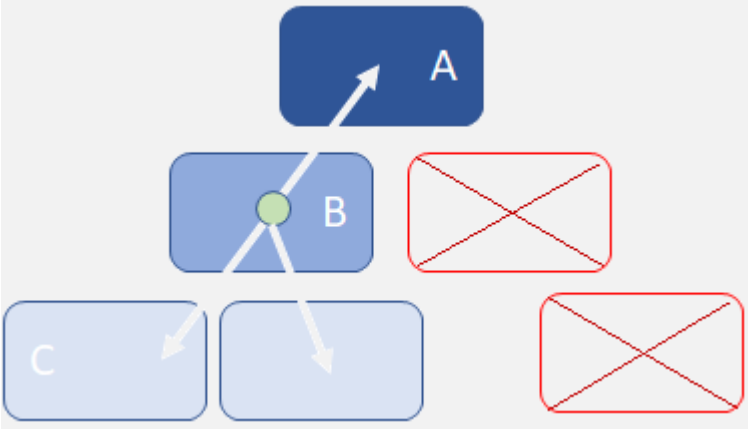
- Base business object (**A**)
- System business object (**B**)
- User-defined business object (**C**)

Depending on which level you start, labeling can affect various other elements as explained in the following cases:

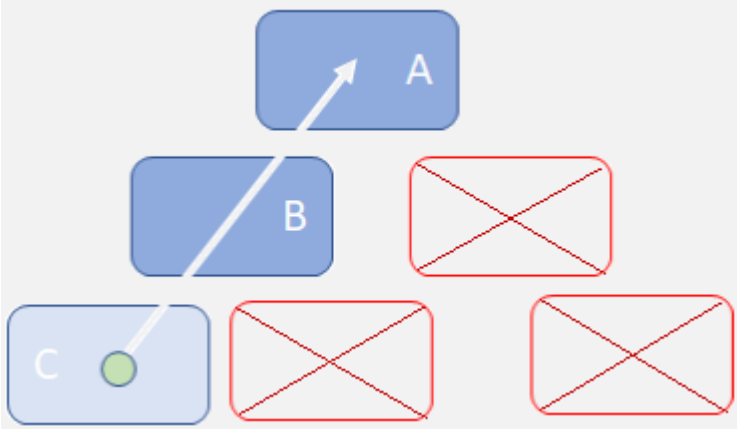
Labeling a base business object



Labeling a system business object



Labeling a user-defined business object


A
B
C

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Configuration change

Any action applied to a configurable element that includes adding, deleting (**Field Definer** only) or changing it.

Configuration label

A set of configuration elements that are uniquely identified by a color, a name and a code. A configuration label contains specific elements that are affected by configuration, and enables (authorized) administrators to focus on testing and evaluating only those specific changes when importing them in a DTA(P) street.

A configuration label is also a means to provide protection against changes to these elements by other simultaneous configuration projects.

DTAP

Acronym for the various phases of software development, testing and deployment: **D**evelop, **T**esting, **A**cceptance, **P**roduction.

During each step, the software is tested and promoted to a next phase until - eventually - the software goes live in Production.

Working with Configuration labels

Configuration labels provides functionality for administrators to create configuration labels, which they can configure in parallel. These labels can contain standard Planon software configuration changes, but could also include external components, such as mail merge templates.

- Data is not part of **Configuration labels**; it can be transferred by using **Enterprise Talk**.
- If **Configuration labels** is enabled and you import an Enterprise Talk/SDI definition, the configuration elements being imported are not labeled.

Adding a configuration label

A configuration label is required for identifying your configuration elements.

Before you add a label, make sure you have enabled the setting. In System Settings > General set the **Configuration labels** field to **Yes**. After refreshing the application, the Planon ribbon will now feature a **Choose configuration label** box.

- For applying a configuration label, you require a license.
- If **Configuration labels** is disabled, the quick search filter for label-aware business object will not be available.

Configuration labels are not affected by licence expiry. Configuration changes will remain if a license expires. Users can apply a new license, log in and continue the configuration work.

1. Go to Configuration labels.
2. Click Add on the action panel.
3. Specify a Code, Name and select a Color and Owner for your configuration label.

Optionally, you can fill out a comment and a start- and end date; these are information only fields.

4. Optionally, you can link other accounts to your label. Only the owner and linked accounts can work on the configuration of a label.
5. Click Save.

   The color, code and name are now displayed in the elements list. The label is now also available in the Choose configuration label box on the Planon ribbon.
6. In the Translations box, you can provide a translated name for the label in the languages that are available in your environment.

7. On the action panel, set the label to Active.

An owner or linked account can only perform configuration for a label if it is Active.

Applying a configuration label

Before you start configuring, on the Planon ribbon, select your label in the **Choose configuration label** box.

By applying a label, all subsequent configuration changes will be marked.

- The **Configuration label** field will not appear in the layout if **Configuration labels** has not been enabled in System Setting.
- When the **Configuration label** is disabled, you cannot import or export configuration labels by using Configuration Transfer. Once enabled, you cannot import, export or preview Configuration Transfer jobs.

Procedure

1. Go to Field Definer and select a business object that you want to configure and set it to Under construction.
2. Go to the Details level and make the required change and click Save.

   A message appears asking you to apply the changes to all derived business objects.
3. Click Yes to confirm the changes.

   The Configuration label field (ConfigurationProjectRef) will subsequently display the code and name of your label.

   For each component in Field Definer (except Custom index), you can change a configuration and when doing so, the label you are working with is applied as reflected in the **Configuration label** field.

   When a label is applied, changes to the affected elements can only be saved when working under the same label. In this way, it is impossible for interfering with the label by other configuration labels.

   You can apply a label to:

   - Fields (including multiselect free fields)
   - Actions (translations on base and system level)
   - Links (only on and exclusively to base level)
   - Statuses
   - Business object settings
   - Custom index

- Status transitions (only on UDBO level)
- Extended actions (fields and translations)
- Display types (translations)
- Extensions

For information about the various business object levels, see Understanding the labeling hierarchy.

4. When you are done configuring, make sure to set the status of all configuration elements back to Completed.

Once selected and a label is applied to configuration elements, it cannot be deleted from the configuration elements until the label is **Canceled** or **Completed**.

Exporting a configuration label

Exporting a configuration label is done by using **Configuration Transfer**.

1. Go to Configuration Transfer > Labels and click Export configuration label on the action panel.

   The Export configuration label wizard appears.

2. Enter a Package name and, optionally, a Comment.
3. Click Next.
4. Select your configuration label and click Complete.

   The export process is started as a background action. Refresh the elements list to view its status.

   Once it is completed, you can view the summary of changes on the **Summary** tab.

5. On the action panel, click Download summary to export the summary as PDF.

The summary (and PDF) contains a list of all affected elements.

6. On the General tab, in the Package field, download your configuration package.

   - **The export contains the (details of) the configuration label and the linked accounts.**
   - **You can import this package in a new environment within your DTA(P) street to further test it.**

Importing a configuration label

In your target environment, you can import the configuration changes related to your label.

- To import your configuration label in your target environment, you must enable the setting in System Settings > General.
- The upload action only makes the configuration label available in **Configuration Transfer** and does not yet apply the changes. First, the changes need to be validated and only then you can click **Run configuration label** to apply them.

1. Go to Configuration Transfer > Labels and click Upload configuration label on the action panel.

   The Upload configuration wizard appears.

2. Browse for and select your import package and click OK and Next.
3. Click Use current property set and click Next.

   The Import summary screen appears.

4. Click Complete to continue, the wizard closes and you return to Configuration Transfer
5. Select your package and dlick Validate configuration on the action panel to check the import package.

   Planon will run a compliance check to validate the content. This is to ensure that mistakes are identified up front and to make sure the import is successful.

6. Once validated, click Run on the action panel.

   The import process is started as a background action.

   Go to **Job details** to view progress (refresh the elements list to update it). When all the steps are done, a green check mark appears in front of them.

   What happens

   - In non-Production systems, the label is imported. Only if the label is imported successfully, the configuration changes can be applied.
   - If the owner is not present in the target system, the label cannot be imported as indicated in the import analysis.
   - If linked accounts are not present, this is not a blocking issue and the import will continue.
   - If the target environment has label whose content overlaps with the label that you are trying to import, the import fails.

What's next

You can test the configuration changes and, if necessary, request the owner or the linked account(s) to make the necessary changes (amend the label) and repeat the process.

When done, reimport the new label to promote the configuration changes to the next phase in your DTA(P) street.

You can click **Download summary** and share the import summary with your customer.

Reviewing your label's business object details

Before you go ahead and import a label into another environment, you may want to review its contents to ensure that you have covered everything you planned to do.

You can, of course, do so by reviewing the summary page in Configuration Transfer, by exporting it, but it is more convenient to review the contents in Configuration labeling itself.

Procedure

1. Create a label in Configuration labels and make it active.
2. Apply the changes as required, selecting the label you have just created.
3. Go back to Configuration labels and select the label you have just applied.
4. Go to the Labeled BO details level.

Here, you will see all the affected business object details.

Discarding a configuration label

After importing a configuration label into Production, if no further configurations changes are required in DTA environments, it can be closed.

1. Go to Configuration labels and select your label in the elements panel.
2. On the action panel, click Closed if your project is done, or click Canceled if you want to abort it. A dialog box asking to confirm the action will appear.
3. Click **Proceed** to confirm the action.

   The label status is changed accordingly and all related elements are purged of the label (the label is removed).

This action is irreversible.

Sorting configuration labels

When applying a configuration label, soon enough you can end up with a significant list of items in your elements list.

How can you search for or cluster a set of labels? The best way to do that is to sort on the labels in the elements list using column sorting.

Procedure

1. Right-click the elements list column.

Typically, the elements list features these four columns:

- System status
- Color
- Code
- Name

2. By selecting the boxes, you can now add the following additional columns:
   - Owner
   - Start date
   - End date
3. Make the required selection and click the headers to sort.

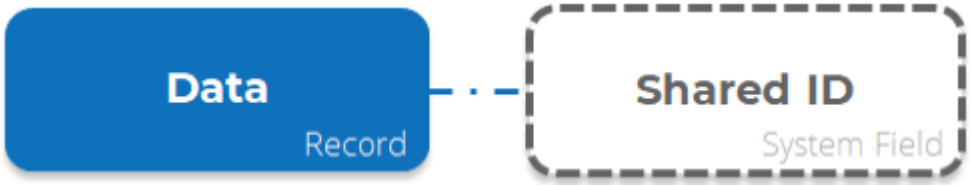
Troubleshooting

The following topic(s) describe(s) specific information that is important to keep into account.

Synchronizing records

A **Shared ID** is a unique, mandatory, and insert-only system field.

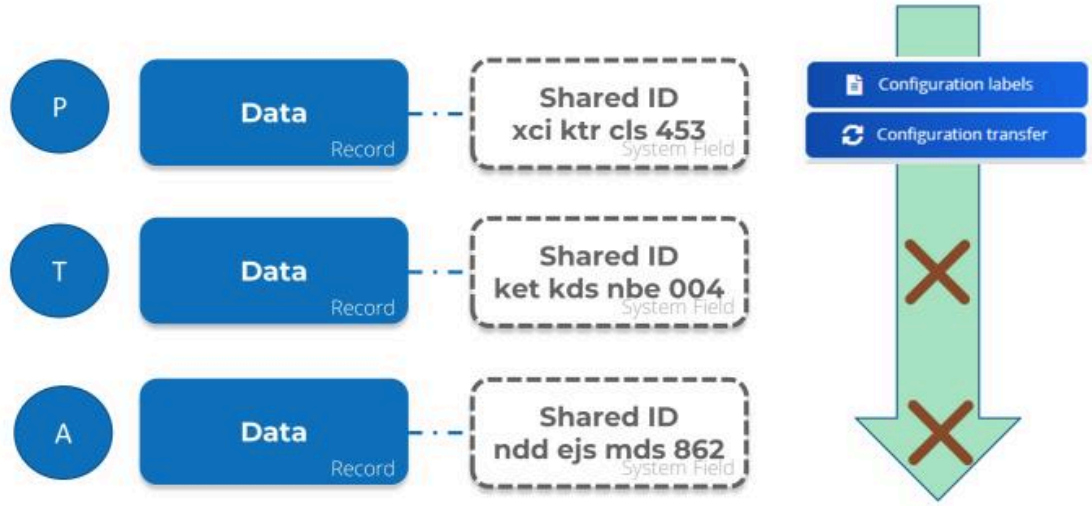
It's purpose is technical: to uniquely identify a record. This is why, while creating a record, the user is not aware of it or needs to worry about it: it is auto-generated during record creation and it cannot be updated later.



Problem

Because of its technical nature, this field is not enabled in GUI and - thus - the user cannot supply a value while creating record via the user interface.

This is problematic when synchronizing data across DTAP environments. If there is no way to synchronize data along with their **Shared IDs**, then the same record in Dev and Test will have different **Shared IDs**, which is functionally incorrect.



This - in turn - is problematic for Configuration Transfer/ Configuration labeling and CAD drawings: it will fail to match the data record with its **Shared ID** in the source and target environments.

Solution

To solve this issue, the **Shared ID** field has been enabled for Enterprise Talk and SDI.

This means that it is now possible to supply the **Shared ID** value while creating a new record using these tools (it needs to be unique, or it will fail).

If you do not provide any value in Enterprise Talk/SDI document or do not include the field in the Enterprise Talk/SDI document, then it will have a unique default value.

How does this work

The **Shared ID** field was introduced in L69. Consequently, when upgrading to L69 (or later) all the relevant records will have this new field, populated with a unique default value.

So, when upgrading DTAP environments separately to L69 this will result in the same records in Dev, Test, Acceptance and Prod having different **Shared IDs** - as already explained.

To solve this issue, we strongly recommend that after the upgrade to L69 is completed to copy the Prod DB to all the lower DTA(P) environments so that for all the existing records the **Shared ID** is in sync across all the DTAP environments.

Technically, it is required only once to copy the Prod DB to lower DTA(P) when you first-time upgrade to L69.

Once all the DTAP environments are in sync you can use the environments as usual.

Going forward, any time if you create a new record in let's say a Dev environment, then you must import that record along with its **Shared ID** to Test and other environments using Enterprise Talk or SDI. Otherwise, records will not be in sync in the DTAP environments, and this will create issues in Configuration Transfer/Configuration Labeling as discussed.

However, synchronizing the **Shared ID** via Enterprise Talk and SDI only works from L75 onwards. So, any new record can be imported to other environments with its **Shared ID** only from L75 onwards. This means that between L69 to L74 there is no way to sync the **Shared ID** for new records and for that you must upgrade to L75. But existing records will work fine between L69 to L74 - provided you copied the Prod DB to lower DTA(P) environments during the upgrade for L69.

Recap

- When you first-time upgrade to L69 then do not forget to copy the Prod DB to the lower DTA(P) environments.
- If you are below L75, then there is no way to sync the **Shared ID** for the new records.
- From L75 onwards, if you create a new record then you must always first import the data with **Shared ID** to other DTA(P) environments before using Configuration Transfer/Configuration Labeling to avoid the **Shared ID** issues.

As always: first import data, then configuration.

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