Documents

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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About Documents

Documents is a central location where users can easily find, view, maintain, and structure the storage of documents in Planon ProCenter.

Documents – Concepts

This section describes the concepts available in Documents and how they interact with each other.

See the links below for more information:

- Dossier
- Document
- Communication logs

Dossier

A user-definable folder structure in Planon ProCenter in which related documents can be stored.

In Documents it is possible to create a folder structure for storing and retrieving documents. This feature enables users create a logical and systematic grouping so that they can easily store and find documents centrally in Planon ProCenter.

Example: Storage of all electrical wiring diagrams related to a specific property under a dossier called **Electrical diagrams [name property]**.

Document

Communication logs

Document

Any communication that is written to a file (physically or electronically) and which is stored for reference purposes.

These files can be in multiple formats, such as CAD and ORJ, DWG drawings, DOC/ DOCX documents, JPG/BMP, PDF, etc. Examples of documents are Floor plans, Electrical wiring diagrams, Maintenance manuals, User manuals, Contracts, etc.

Throughout *Planon ProCenter* various kinds of documents can be stored as Communication logs, for example, image files (photo's), property-related files.

Dossier

Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.

For communication logs that are automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see Communication log fields.

You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Dossier

Working with Documents

This section describes the processes and tasks that can be performed in the Documents TSI.

See the links below for more information:

- Adding a dossier
- Adding a subfolder to a dossier
- Adding a communication log
- Searching for a communication log
- Viewing property-specific dossiers or documents

Adding a dossier

You can create a clear hierarchical folder structure to store and retrieve documents.

Procedure

1. Go to the Components > Dossiers step.
2. On the action panel, click Add.

   Complete the relevant fields in the data section. For a description of these fields, refer to Dossier fields.
3. Click Save. The dossier is created.

   When the document is added to the dossier, on the action panel, click **Activated** to indicate that the dossier is complete.

   To **Archive**/**Retrieve from archive**, click the appropriate action on the action panel.

Adding a subfolder to a dossier

You can create a hierarchical dossier structure with sub folders. The procedure for creating subfolders is similar to creating a dossier.

Procedure

1. Go to Dossiers and select a dossier from the list.
2. On the action panel, click Add sub.
3. Complete the relevant fields in the data section. For a description of these fields, refer to Dossier fields.

In **Field definer** > **Dossiers** business object, the **Property** field is by default not set to inherit its value. If you set this value to **Yes**, the Property field for subs will inherit its value from the main level.

4. Click Save. You have now created a subfolder.

When the documentation is added to the dossier, on the action menu, click **Activated** to indicate that the dossier is complete.

You can add up to 10 subfolders to a dossier.

Adding a communication log

The Documents TSI is the central place for adding communication logs to business objects. You can add communication logs to a dossier and make them available to Planon ProCenter users authorized to view these documents.

Procedure

1. Go to Communication logs.

Alternatively, on the Components > Dossiers level, select a dossier and then go to Communication logs.

2. On the action panel, click Add.
3. Select a relevant communication log type.
4. Complete the relevant fields in the data section. In the Document reference field or Document (secure) field, browse and select the document you want to add.
5. Use the Start date-time and / or End date-time fields to create a time window during which the document is valid and available.
6. Click Save.

You have now added communication log.

In addition to the Documents TSI, the communication log is also available in any TSI related to its business object. For example: if you add a communication log for assets in Documents , this is also available in the Assets TSI.

Searching for a communication log

The Documents TSI is the central place for viewing Communication logs created throughout Planon ProCenter.

If you are looking for a specific communication log, but you do not know in which dossier it is stored, you can display a list of all communication logs by directly navigating from the **Properties** level to the **Communication logs** level.

Here, you can perform a search to limit the results or to find the exact communication log that you are looking for.

If you know the business object to which the communication belongs, you can select the corresponding selection step on the **Components** level and drill down to the **Communication logs** level to view the related communication logs. You can also drill down from the **Dossiers** selection step.

Viewing property-specific dossiers or communication logs

You can view dossiers and communication logs related to a specific property.

Procedure

1. Go to Property and select a property from the list.
2. Go to the Dossiers selection level and select a business object selection step to view the communication logs of that business object. For example, Contracts, Orders etc. The list will only display elements related to the selected property.
3. Select the Communication logs selection step to view all communication logs directly linked to the selected property.

Downloading files linked to communication logs

You can download the files linked to communication logs as a zip file.

1. Go to the Communication logs step.

If you navigate from a specific property, only the communication logs of that property will be shown.

2. Select the communication logs whose linked files you want to download.

Use SHIFT+click or CTRL+click to select multiple files.

3. On the action panel, click Download files.

The files linked to the selected communication logs are added to a zip file and downloaded to your browser's download location.

• This works for images, regular documents as well as for secure documents.
• It does not work for free field file references.
• By selecting the root node you can download the files of all records in the list.
• This feature is available on all **Communication logs** steps.
• If specific files of a communication log cannot be added to the zip file, this is mentioned in a log file that is included in the zip.

Documents – Field Descriptions

Dossier fields

Field	Description
Code	Enter a unique code for identifying the dossier.
Property	Select the property where to link the dossier to (optional).
Description	Enter a description.
Parent level	If, while you adding a subfolder, you decide to add it to a different parent level, you can select it here.

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