



# Fundamentals

## Planon Software Suite

Version: L105

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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](mailto: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.

# Table of Contents

Starting the Planon application.....	7
Logging in.....	8
Password requirements.....	10
Logging out.....	11
Overview.....	12
Planon ribbon.....	14
Help menu.....	16
My account.....	18
Navigation panel.....	20
Accessibility.....	22
Using landmarks.....	24
Homepage.....	25
Gadgets.....	26
Configuring gadgets on the home page.....	27
Tablet users.....	28
Getting started.....	29
Web Client menu.....	30
Basic navigation on a tablet.....	31
Elements panel on a tablet.....	33
Data panel on a tablet.....	34
Action panel on a tablet.....	35
Standard features.....	36
Planon ProCenter - shortcut keys.....	37
Selection bar.....	38
Elements panel.....	39
Element hierarchy.....	41

Footer bar.....	43
Action on selection.....	44
Modify within selection.....	47
Select all.....	49
Data panel.....	50
Panel resizing.....	52
Uploading a file.....	53
Action panel.....	54
Copy.....	55
Delete.....	56
Change type.....	57
View status flow.....	58
Searching / filtering.....	60
Search operators.....	61
Filter types.....	62
Using search operators.....	63
Examples of using multiple search operators.....	65
Using filters.....	70
Using the date-time filter criteria.....	71
Date-time operators.....	72
Toggle a filter on/off.....	73
Adding an AND/OR filter.....	74
Using the AND/OR filter.....	76
Grouping filters.....	77
Relative filters using macros.....	78
Relative date-time filters.....	79
Primary and secondary arguments.....	80
Special relative filters.....	83

Editing a filter.....	84
Copying a filter.....	85
Previewing changes in the existing filter.....	86
Deleting a filter.....	87
Communication logs.....	88
Communication logs - reference date.....	89
Reporting.....	90
Saving reports.....	91
Save options for reports.....	92
Exporting data to XLS / XLSX.....	94
Previewing & printing reports.....	95
Report settings.....	96
Archiving element(s).....	97
History.....	98
Viewing history logs.....	99
Adding history manually.....	101
Field types.....	102
Self-Service – an Introduction.....	106
Self-Service - Standard features.....	107
Self-Service form.....	108
Searching in Self-Service.....	110
Shortcut keys.....	111
Index.....	115

## Starting the Planon application

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Logging in  
Logging out

---

## Logging in

### Procedure

1. Click the Planon Web Client URL.
2. In the login screen, enter your User name and Password.



3. Click Login.

### Note

- The login page appears in the language of the browser. If this language is not supported, the login page appears in the locale of the server.
- You can override this by configuration. For more information, see [Configuring the login language](#).
- After logging in, the Web Client appears in the language of the user account. If your organization uses 'single sign on' to log in, you might not see the login page.

If your password is reset, depending on the password settings, you will be prompted to change your password at the time of logging in.





Your password has expired. Please enter a new password

Current password

New password

Confirm new password

Reset

- In the **Current password** field, enter your current password. For information about password requirements, see [Password requirements](#).
- In the **New password** field, enter your new password.
- In the **Confirm new password** field, re-enter your new password for confirmation.
- Click **OK**.

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Password requirements

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## Password requirements

When creating a new password, it is important to adhere to specific criteria to ensure its strength and security. Planon ProCenter enforces the following requirements to maintain robust protection for the account:

- **Minimum length:** must be at least 10 characters long.
- **Maximum repeating characters:** maximum of three repeating characters.
- **Digit inclusion:** must contain at least one digit (0-9).
- **Symbol inclusion:** must contain at least one symbol (!, @, #, etc.).
- **Uppercase and Lowercase:** must include at least one uppercase and one lowercase letter.
- **Maximum alphanumeric sequence:** cannot contain sequences of more than two consecutive alphanumeric characters.

### Examples of passwords:

1. **Strong Password:** Ex@mpl3Pa55!

This password meets all requirements:

- It is 12 characters long, satisfying the minimum length.
- It includes an uppercase letter (E) and a lowercase letter (x).
- It contains a symbol (@) and a digit (3).
- There are no more than three repeating characters, and there are no consecutive alphanumeric sequences longer than two characters.

2. **Weak Password:** Passw0rd!123

This password fails to meet the requirements due to:

- Three consecutive repeating characters (123).
- There is no variety in the repeating characters.

The strength of a password directly impacts the security of the account. Avoid using easily guessable passwords such as common words, sequences, or personal information. Instead, aim for a unique combination of characters that fulfill the specified criteria outlined above. Regularly updating password also adds an extra layer of security to the account.

## Logging out

You can log out of the Planon Web Client in three ways:

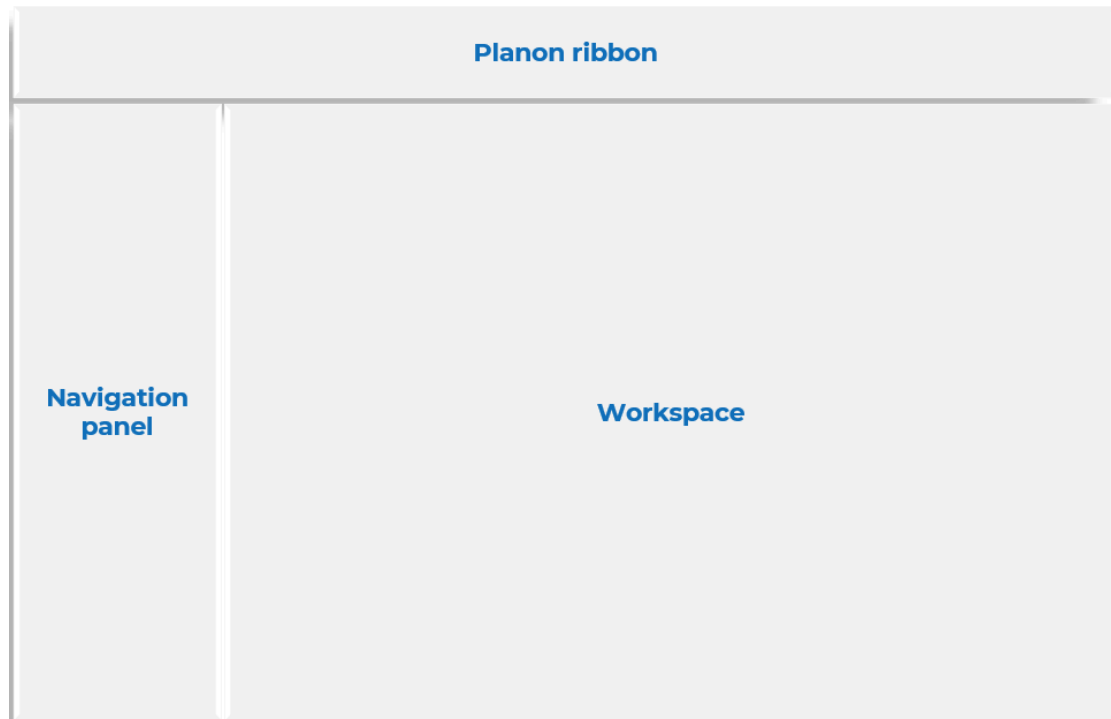
- Using the Log out button on your account information.  
This is the preferred way, as this frees your license.
- Closing the browser - the session will expire after a certain time, only then the license will be freed.
- If you do not use the application for a certain period of time specified by your administrator, you will be logged out automatically.

## Overview

This topic describes the basic features of Planon and its various screen elements.

The Planon user interface mainly consists of these sections.

- **Planon ribbon**
- **Navigation panel**
- **Workspace**



### **Planon ribbon**

The ribbon contains the navigation panel toggle button and the Planon logo on the left side and some generic features which work across the application. For more information about the options on the ribbon, see [Planon ribbon](#).

### **Navigation panel**

The navigation panel allows you to navigate through the different modules of the application. Click a navigation item to open the module in the workspace. For more information, see [Navigation](#).

### **Workspace**

The Workspace is that part of your screen where a user interface module such as the homepage or a TSI is displayed. For more information, see [Homepage](#).

### **Multi tab browser support**

- You can open Planon in multiple tabs on your browser.
- A single login works for all browser tabs.
- Only one module license is used for all tabs.

- When you open the application in different tabs, you can view the same or different TSIs from your navigation panel.
  - This can be done by copying the URL to a new tab or right-clicking a TSI in the navigation panel and opening it in a new tab or a window.
- 

Planon ribbon  
Navigation panel  
Accessibility  
Homepage

---

## Planon ribbon

The Planon ribbon contains general screen elements and functions that are applicable across the application.



- The **Planon** logo.
- The **reference date** button **Today** is selected by default. The **Choose reference date** option allows you to select a specific date from the calendar. The selected reference date is taken into account for all transactions across the application. You can deactivate the reference date by selecting the **Inactive** option. The **Select another date** option enables you to select a different date as a reference date.

Choose reference date



**Today**

Inactive

17 Oct 2019 (Last selected date)

Select another date

October 2019						
Mo	Tu	We	Th	Fr	Sa	Su
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

- Clicking the  button will redirect you to the alarms set for you.
- Clicking the  button will redirect you to the Planon Web Help. See: [Help menu](#).
- Click [My account](#) to view/edit personal information.
- Click **Log out** to log out of Planon Web Client. Your license will be released and you will be redirected to the login screen.

Help menu  
My account

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## Help menu

Planon features a **Help** button in the top-right corner that opens a menu providing access to information about the software and privacy statement of your company (GDPR legislation).

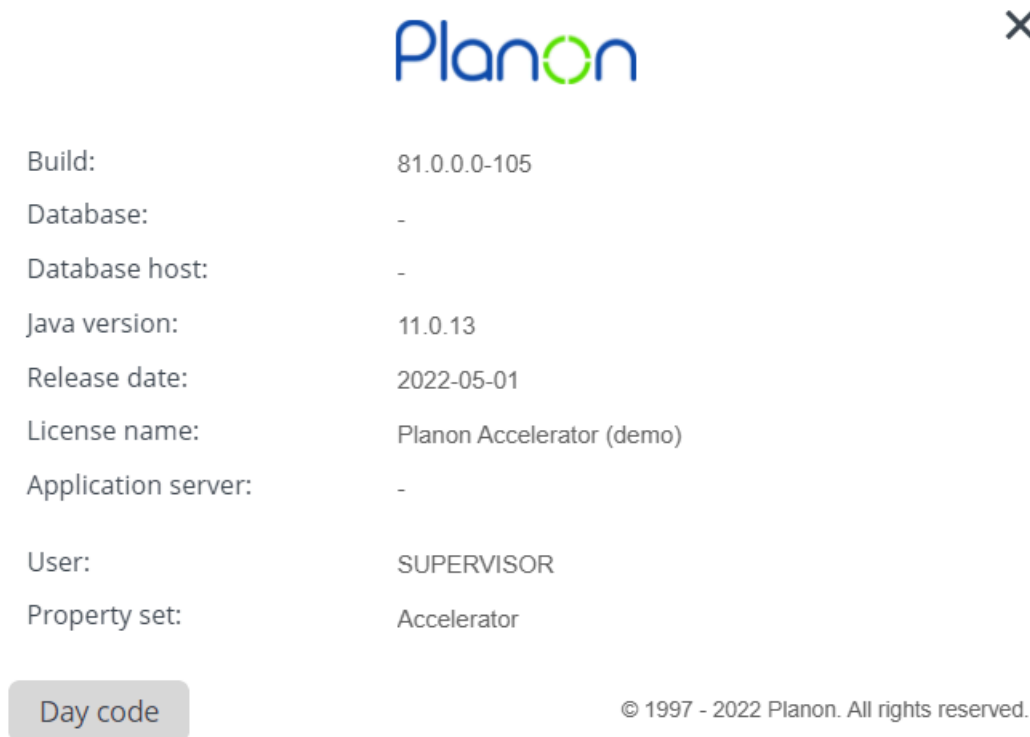
The options listed in the **Help** menu are:

- **TSI Help:** Enables you to view help information related to the TSI that is active on the screen. The option is visible only if a document/web page related URL is specified in [TSI Help URL](#). If there is no URL specified, the option will not be visible in the menu.
- **WebHelp:** Enables a user to start and view the Planon WebHelp. The WebHelp is displayed in the language of the version of the WebHelp specified in the [Help URL](#) field (System settings).
- **Privacy statement:** Enables you to view the privacy statement of your company to be compliant with GDPR regulation. The privacy statement can be specified in **General settings TSI > Privacy Statement**. If there is no privacy statement specified, the option will not be visible in the menu. For more information about the Privacy Policy statement, see [Privacy statement](#).
- **About:** Enables you to get information about the version of Planon you are using.

### Tip

For information about the history of installed versions of Planon in your environment, see [Creating a product version overview](#).

- This information is important in the communication with Planon or to assess whether an update should be considered (based on the release date)



Build:	81.0.0.0-105
Database:	-
Database host:	-
Java version:	11.0.13
Release date:	2022-05-01
License name:	Planon Accelerator (demo)
Application server:	-
User:	SUPERVISOR
Property set:	Accelerator

Day code

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- **Keyboard shortcuts:** Enables you to view the available keyboard shortcuts in Planon. For more keyboard shortcuts, refer to [Shortcut keys](#) (Fundamentals).





## My account

The **My account** button in the [Planon ribbon](#) allows you to edit your personal data and account settings. In **My user account**, you can view your **User name**, **Password expiry date** and change your password with the **Change password** option.

**Note** Planon application managers can add or remove fields in this window in the Web Configuration TSI. For more information, see [Making My account settings for end users](#).

In **My account settings**, click the **Edit** button to change the following settings:

- **Use 24-hour notation**

With this setting, you can toggle between the 24-hour clock notation and the 12-hour clock notation (with AM and PM). The 24-hour clock notation represents time continuously from 00:00 (midnight) to 23:59 (11:59 PM) without the use of AM or PM indicators, employing a 24-hour format to express the time of day. The 12-hour clock notation, along with AM (Ante Meridiem) and PM (Post Meridiem), divides the day into two 12-hour segments to denote time. The selected time notation is used throughout the application.

- **Contact's email address**

Select or add an email address that must be used as the user's Exchange email address. This field is used by the Connect for Outlook feature in order to link the Outlook user to a user account in Planon.

- **Language**

Select the language in which you want to display the application.

- **Displayed unit of length**

Select the unit of length you want to use in the application: meters or feet. The selected unit of length is used throughout the application.

- **Autoselect first item in list?**

Select **Yes** to automatically highlight and select the first item in the elements list.

- **Theme**

Select the theme you want to use: Planon light, Planon dark or High contrast.

### Tip

To view the changes, click the **Save and log off** button.

The name displayed in the **My Account** list is either derived from the account or the person linked to the account. This table shows the name that is displayed.

	Account		Person	Displayed
User name	Description	First name	Last name	
WEASLY	Adam Weasly	Adam	Bilt	Adam Bilt
WEASLY	Adam Weasly	Adam		Adam
WEASLY	Adam Weasly		Bilt	Bilt
WEASLY	Adam Weasly			Adam Weasly

Account		Person		Displayed
User name	Description	First name	Last name	
WEASLY		Adam	Bilt	Adam Bilt
WEASLY		Adam		Adam
WEASLY			Bilt	Bilt
WEASLY				WEASLY

The photo displayed on the **My Account** menu is determined based on this table.

Account - Photo	Person - Photo	Photo displayed in 'My Account'
Y	Y	Person-Photo
Y	N	Default image
N	Y	Person-Photo
N	N	Default image

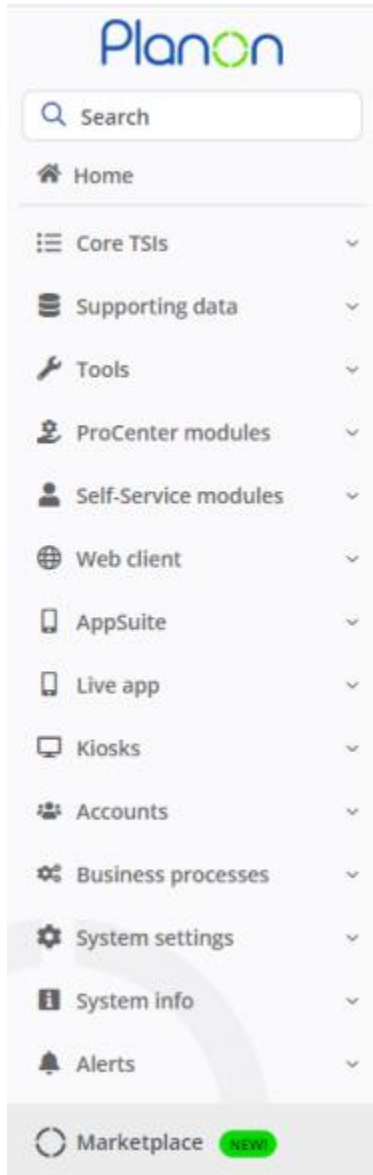
If no photo is selected in the **Photo** field, a default image appears. This placeholder displays one or two characters. This example shows which characters might appear in the default image.


Account - User name	Person - First name	Person - Surname	Displayed
WEASLY	Adam	Bilt	AB
WEASLY	Adam		A
WEASLY		Bilt	B
WEASLY			W

**Note** If **First Name** and **Surname** do not contain any value, then it means the fields are empty (none of them are system mandatory) or no person is linked to the account.

## Navigation panel

The navigation panel displays the available navigation groups. Navigation groups typically include various functionality related navigation items (TSIs or URLs).




Instead of browsing for navigation items, you can search for them using the quick search bar  Search .

For easy access, the search will remember your last five searched items and display them when you click in the search bar.


## Navigation panel modes

**Expanded and pinned:** This is the default mode. In this mode, the navigation panel is always visible on the same plain as the workspace. It is pinned and all the TSIs are available to be opened in the workspace. You can collapse the navigation panel by

clicking the  button.

**Note**The panel can be pinned, only if the screen resolution is more than 1200 pixels.

**Collapsed:** In this mode, the navigation panel is hidden. You can expand the navigation

panel by placing the cursor on the  button. A floating navigation panel becomes available and allows you to do your actions on the navigation items, such as, opening a TSI in the workspace.

When you minimize your computer screen, the navigation panel is automatically collapsed. It returns to the previous mode when you expand it again.

**Note**The panel cannot be pinned if the screen is minimized or the screen resolution is less than 1200 pixels. In this state, the navigation panel is in the slide mode.

## Accessibility

Planon is committed to making its software available to as many people as possible and subscribes to the Web Content Accessibility Guidelines (WCAG).

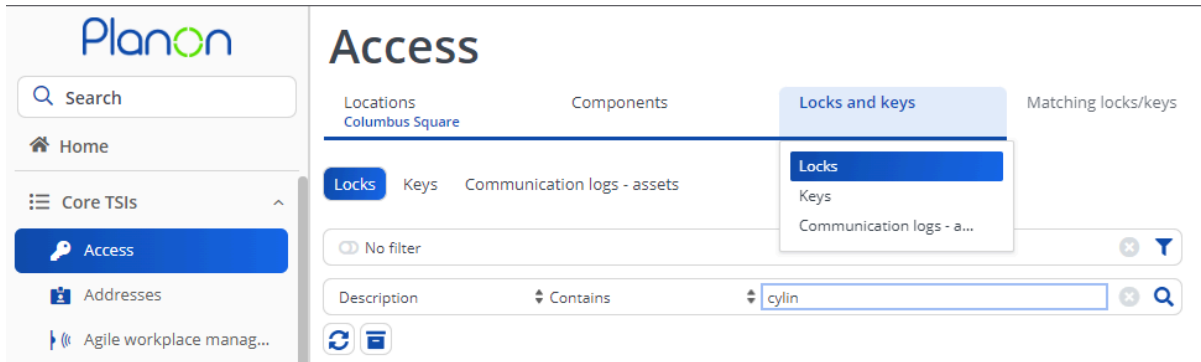
Accessibility is **the practice of making information, activities, and/or environments sensible, meaningful, and usable for as many people as possible.**

This has resulted in a number of adjustments in navigating the software. The most important ones are listed here.

### Navigation

To assist users in navigating through the application, Planon supports these features.

- Focus: The item in focus is clearly marked, by a solid block or a border



- Keyboard control:
  - TAB character moves through the application (or SHIFT+TAB to go back).
  - ENTER activates a feature or opens a menu.
  - Arrow keys navigate through a list.
- Quick jump: In the elements list, when the top node is selected, press a letter (combination) to *jump* to the location.
- Visual themes: Each user can choose a theme that provides the best possible visual experience. It is possible to create customized themes and there is a high-contrast theme.

For more information, see [System Settings > Theme](#).

- Providing aria tags for screen reading software.

In addition, Planon has invested in a library that helps us test our software up front against the latest [WCAG 2.1 guidelines](#). For the future, Planon remains committed to following these and more recent guidelines to the best of our abilities.

For a quick overview of what we have recently implemented, please check the [Online Release Notes](#).

**Note** These improvements are implemented across the board except for configuration modules and graphical components.

Using landmarks

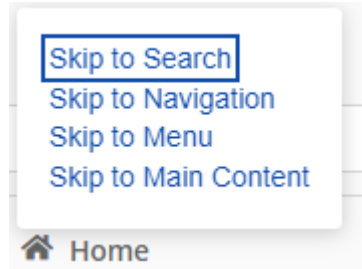
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Using landmarks

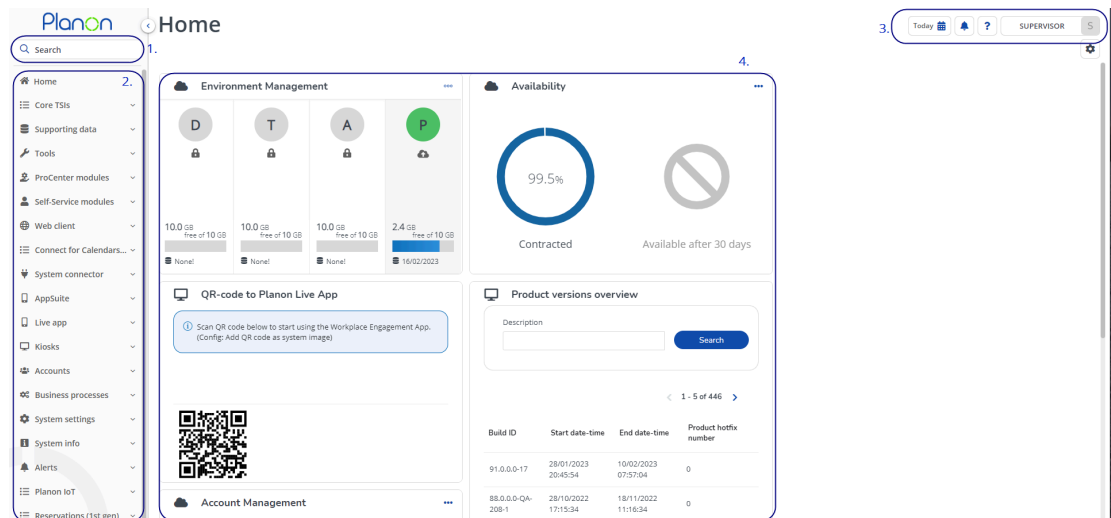
## Using landmarks

In the user interface, a *landmark* refers to a screen area.

When opening the application and pressing a TAB key or by pressing ALT+SHIFT+L, you open the **Skip links** menu (top left corner):



The navigation options in the menu correspond with the following landmarks in the application:



Landmarks subdivide the application into four areas and by jumping into these areas, you can hierarchically navigate through it by using keyboard keys.

- By using the TAB key, you can navigate through the **Skip links** menu.
- Press ENTER to *jump* to a specific landmark.
- Use the TAB key or arrow keys to navigate inside a landmark.

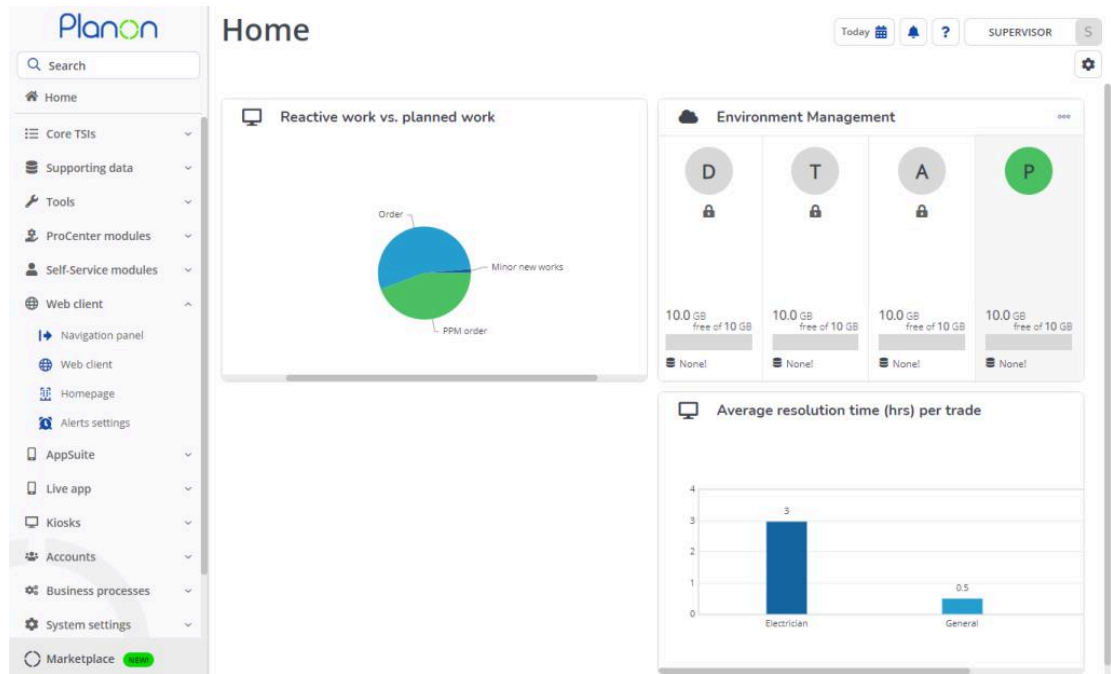
## Accessibility



## Homepage

After logging in, the homepage is shown in the workspace.

This image displays the Homepage with several gadgets.



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## Gadgets

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## Gadgets

A gadget gives you quick access to vital information directly from your homepage. You can use the gadget library to configure the gadgets on your homepage. The library contains several predefined gadgets and allow you to customize your homepage with gadgets of your choice. Your application manager can create new gadgets if needed.

If filtering is configured for the gadgets, a bar with a generic filter icon appears on the homepage. If a gadget is actively using a filter, a yellow filter icon appears on the gadget. The search fields in the gadgets are read-only when using the generic filter. You can use a filter to get an overview for the selected gadgets based on the filter criteria.

- Note.** You can select multiple values (using click selection or Shift + select) to filter on if the **In** operator is selected in the search fields. For more information, see [Search block](#).
- For more information on configuring a generic filter, see [Adding a generic filter for gadgets on the homepage](#).

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Configuring gadgets on the home page

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## Configuring gadgets on the home page

You can add gadgets to or delete them from the homepage easily.

**Note** By definition, gadgets are small in size and shape and are not meant to load or display large data sets. If you are configuring search fields to appear at the top of a gadget, it will mean that less space is available to display lists and consequently, the user might need to scroll through multiple pages.

When configuring gadgets, please ensure to adapt the content of the gadget respective to the gadget's size by configuring the Self Service forms accordingly.

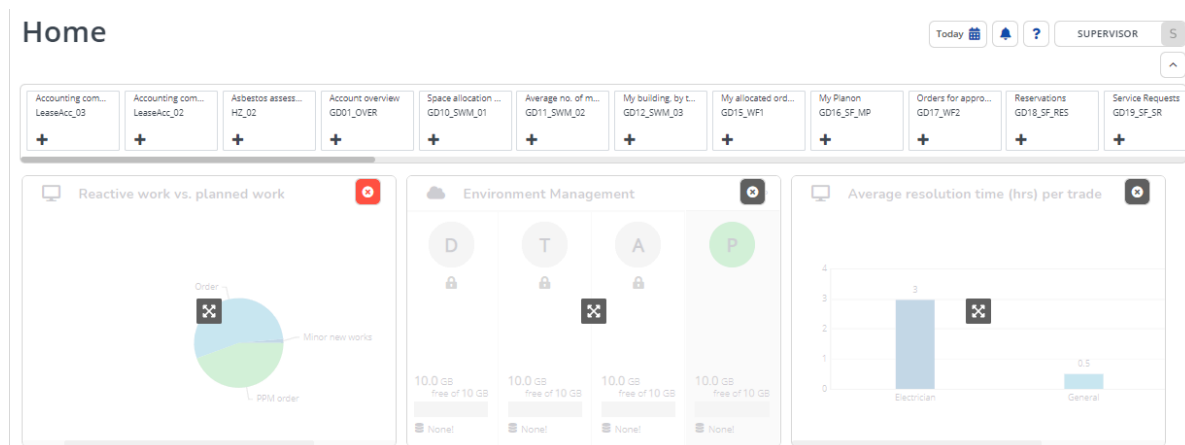
### Procedure

1.



Click the Edit mode button on the right. The gadget library appears and the existing gadgets on your homepage are unlocked.

2. The library displays all available gadgets.



3. Click on the + icon of a gadget to add it to the homepage.

4. To move the gadget around on the workspace, hold the gadget (with the four-arrowed cursor) and drag it to the required position.

5. To remove the gadget from the homepage, click the cross sign on the top right corner of the gadget.

The gadget disappears from the homepage and moves back to the library.

6.



Click the button, when you have finished configuring the homepage.

The library is closed and the gadgets are locked on the homepage. The gadgets you selected from the gadget library are now activated.

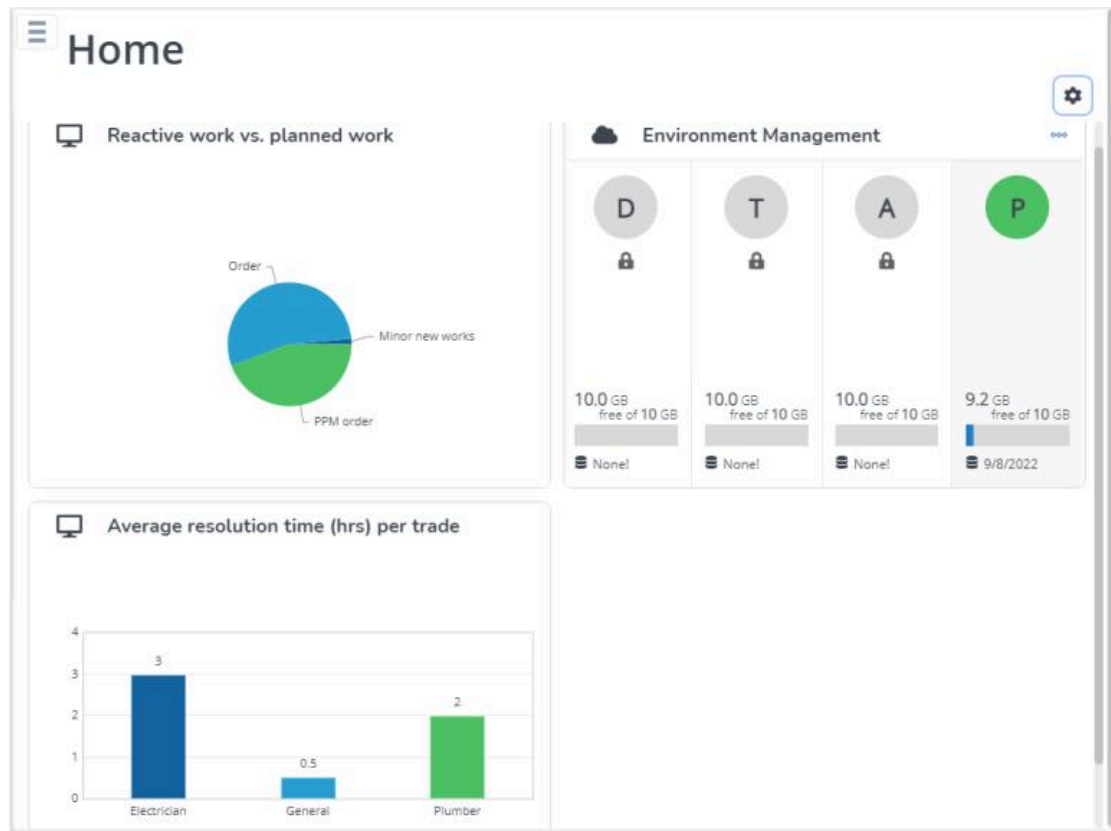
## Tablet users

The Planon application offers an interface that runs on all desktops, laptops and tablets. This enables an optimal use of available space on screens with different resolutions (responsive behavior) and touch support on tablets.

The Planon application is built for the major mobile platforms such as Android, iOS and Windows.

Users such as field engineers, managers and self-service users can use Planon application on tablets to access and update information on the go.

The responsive Planon application runs on screens with a screen resolution higher than 960 px by 540 px (qHD resolution) and a minimum size of 7.9 inches.



**Note** For more detailed specifications and limitations for tablets, see [Supported Configurations](#).

Getting started  
Web Client menu  
Basic navigation on a tablet

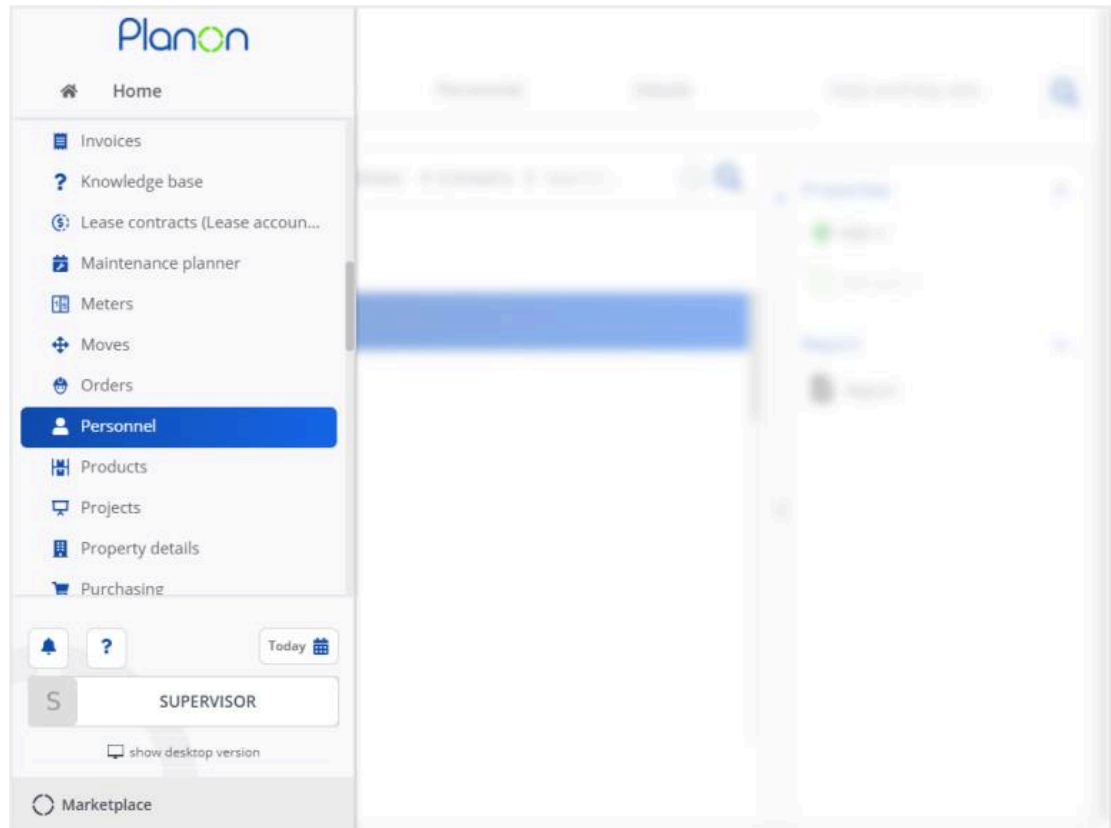
## **Getting started**

Log in to Planon application on a tablet.

After the login, the homepage of the Planon application is shown full screen.

## Web Client menu

The Web Client menu integrates the navigation panel and the ribbon into a single menu. It opens the navigation panel and the general functions. The Web Client menu appears as an overlay on the workspace.



### Navigation panel on a tablet

- The navigation panel is shown when you open the Web Client menu.
- Tap a navigation group and then a navigation item. The corresponding module opens in the workspace and then the Web Client menu is hidden.

### General functions

General functions such as user account details, the alarms button and other details are shown at the bottom of the Web Client menu. For more information about the general functions, see [Ribbon > User account details](#)

### Show desktop version

Clicking this button allows you to open the desktop version of the Web Client

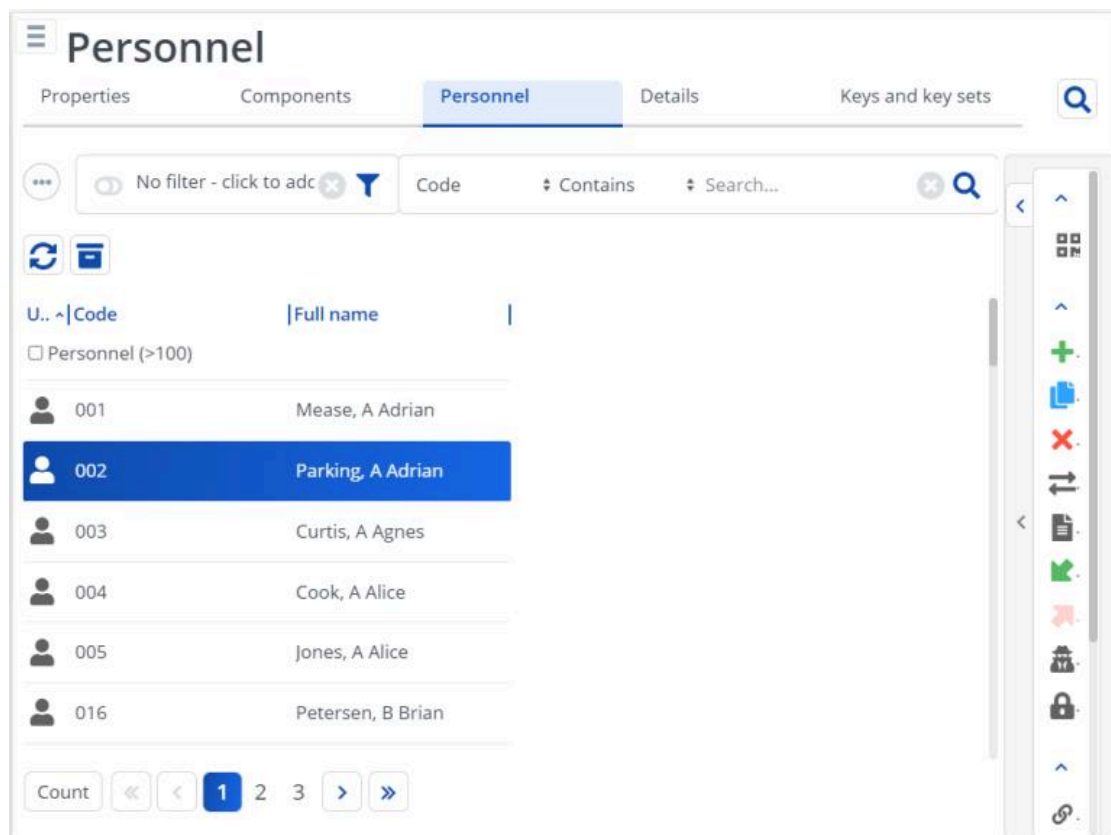
## Basic navigation on a tablet

When you open a web client module on a tablet:

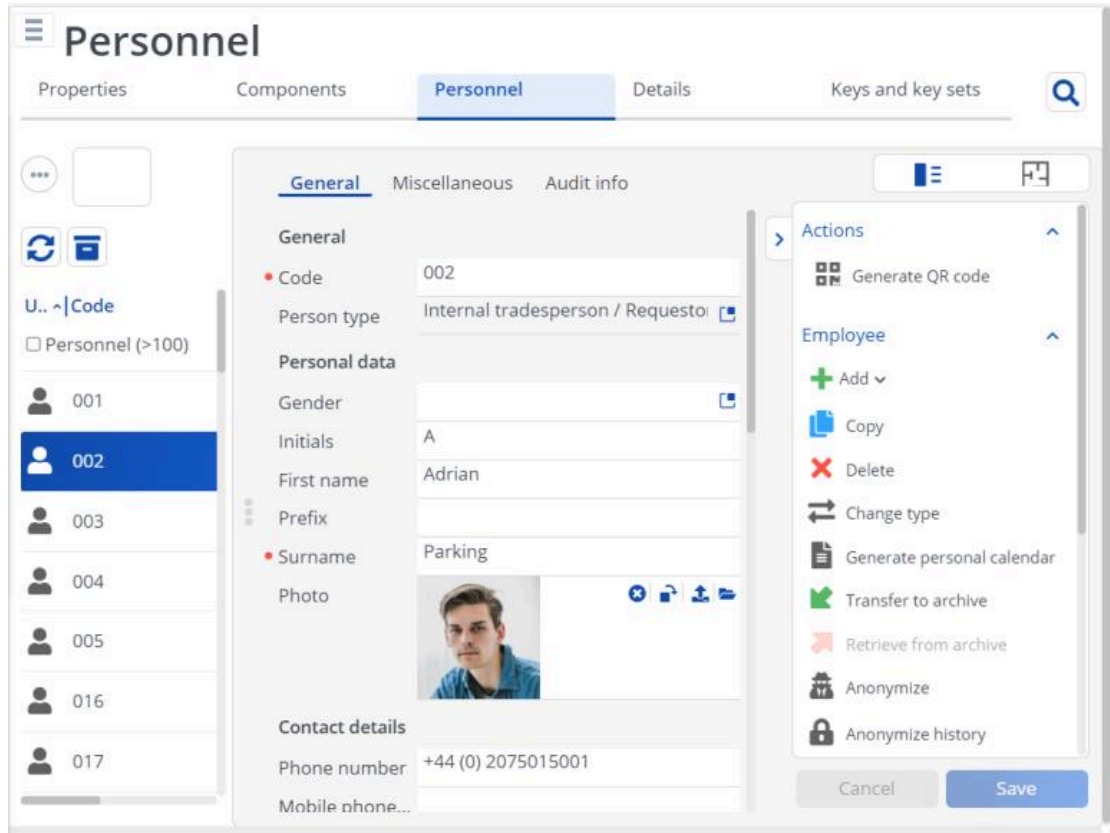
- the elements list is shown
- the data panel is hidden
- the action panel is shown minimized
- the quick search and filter panels are available

All these panels can be expanded and collapsed to optimize the available space on the screen. These user settings are stored for every selection level and step. Your settings are retained when you log in next time.

This image displays a module on a tablet with only the elements panel expanded. The action panel is collapsed, just displaying the icons.



This image displays a module with all three panels (elements panel, data panel and action panel) expanded on a tablet.



Elements panel on a tablet  
Data panel on a tablet  
Action panel on a tablet



## Elements panel on a tablet

The elements panel appears, when you open a Web Client module on a tablet.

To view an element's details:

- Tap once to select the element. It allows you to perform an action, such as copy, link or change status.
- Tap again on the selected element to open the details in the data panel.





The element list toolbar can also be expanded and collapsed. Tap the button to toggle the tool bar.

For more features of the elements panel, see [Elements panel](#).

### Warning

Multiple selection of elements is not supported on tablets.

## Data panel on a tablet



You can expand  and collapse  the data panel using the buttons on the center-left of the data panel. On the data panel, you can view/modify data. The keyboard on the tablet becomes available, if you want to add/change information on the data panel.

When the data panel is expanded, the quick search and the filter panel are minimized and the elements list is minimized.

The quick search and filter show a color if the filter is active. Click on the panel to access the quick search and the filter bar. At this moment, the data panel will be collapsed and the elements panel will be expanded.

For more features of the data panel, see [Data panel](#).

## Action panel on a tablet

You can expand  and collapse  the action panel using the buttons on the top-left of the action panel. Collapse the action panel for a full view of the data panel. When the action panel is collapsed, only the icons corresponding to the actions are visible.

For more information on actions, see [Action panel](#).

## Standard features

This chapter describes the standard features available across all the TSIs of Planon ProCenter .

*Planon ProCenter* supports working with several keyboard shortcut keys to perform certain actions in the application.

### Tip

For more information, see [Planon ProCenter - shortcut keys](#).

---

Planon ProCenter - shortcut keys

Selection bar

Elements panel

Action on selection

Modify within selection

Select all

Data panel

Uploading a file

Action panel

---

## Planon ProCenter - shortcut keys

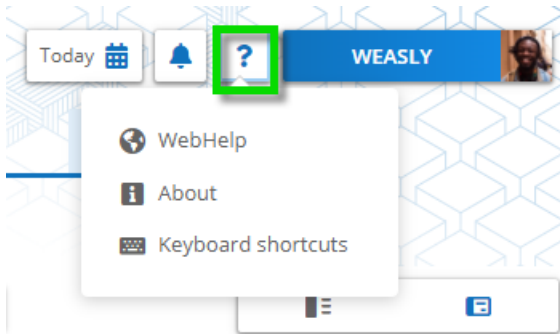
This topic helps you to know how to access the keyboard shortcut keys available in the application.

### Procedure

To access the keyboard shortcut keys:

1. Click the help icon ( ? ) on the top right corner .

These options appear.



2. Click Keyboard Shortcuts from the list.  
The **Keyboard shortcuts** page appears.

### Keyboard shortcuts

#### Navigation

Show / hide navigation panel: Alt + L

Search in navigation panel: Alt + S

#### Element list

Refresh list: F5

Navigate through element list / tree: Arrow keys

Jump to first element in list / tree: Any key (alphabet)

Multi-select elements in list: Control + A

Select root node: Shift + Home

#### General

Save changes of business object: Control + S

Enter date & time (date-time fields only): Control + D

Refresh browser: Control + F5

Find element by number or code (Order-related TSIs): Control + Space

#### Planon WebHelp

Open shortcut information: ?

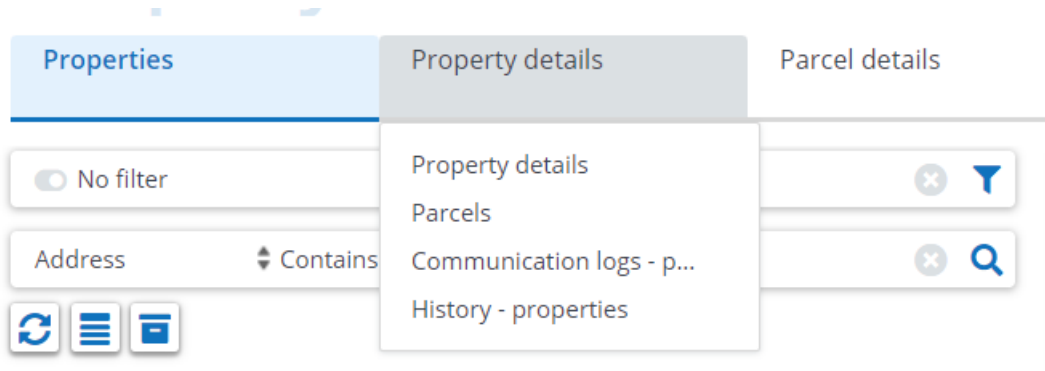
Open Planon WebHelp: Alt + F1

Close

## Selection bar

The selection bar displays all the available selection levels of the TSI you have currently selected. On selecting a selection level, the corresponding selection steps appear.

When you position the cursor over a selection level, a list of selection steps on that level appear. You can also jump to a selection step by selecting it from this list. The currently active step on that level is highlighted in the list.



**Note** The selections steps are displayed only if there are more than one selection steps.

By choosing elements on each selection level, you can also pre-select and have only the required data shown.

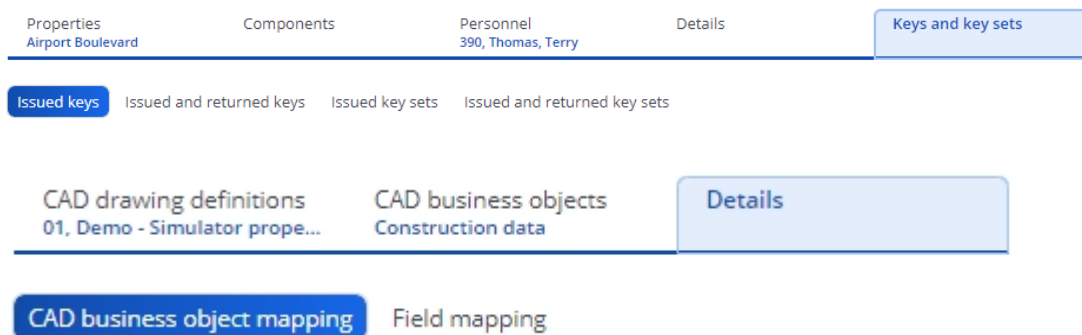
## Elements panel

In Planon ProCenter Web Client, the elements panel displays elements that are relevant to the TSI and level /step you have selected. The elements differ with every TSI you open, and the selection levels / steps you choose subsequently. Examples of elements are **Properties**, **Assets**, **Orders**, **Contracts**, or **Personnel**.

An element that has been selected in the elements list is called an active element.

**Note** Elements panels are also displayed in pop-ups that are opened from within a reference field.

When you move from one selection level to another, the selected element name in the previous level appears below the level name. If the text is too long, the full text is given in a tool tip.



Functions to change the view of the element list as a whole are placed in the toolbar above the element list. Using these actions, you can:

- Refresh the elements list
- Show list / tree view
- Show archived items
- Other, element specific actions: actions that are relevant only to the selected elements panel. For example, in **Orders** you will find order-related actions, such as **Show related work orders** or **Show color-based priority**.



**Note** When you select the an action it changes color to indicate that it is activated.

You can also change the view of the elements panel by:

- Resizing the columns: drag the column header handles until you reach the required size.
- Showing/hiding columns: right-click the column header and select the relevant options in from the list. Select or clear the check box(es), to display or hide columns as required.

## Link standard service plans

Classification group    Search...

All  
 Technical classification  
 Classification group  
 Asset classification

Available

Maintenance...	Code	Description
PBM	21.11.100	Brick
PBM	31.30.092	Exter...
PBM	31.31.100	Exter...
PBM	31.40.091	Window Framework < 300mm p...
PBM	31.41.100	Window Framework Wooden
PBM	41.11.200	Facade Pointing
PBM	41.11.300	Facade Tiling

In use

Maintenance library.Code	Code
M&E	SP22

OK    Cancel

- Adjusting the viewing area: use the horizontal and vertical scroll bars.

### Note

- The column headers of the elements list remain visible while you scroll through the list.
- The selected view per TSI is remembered even after logging out.

---

Element hierarchy  
Footer bar

---



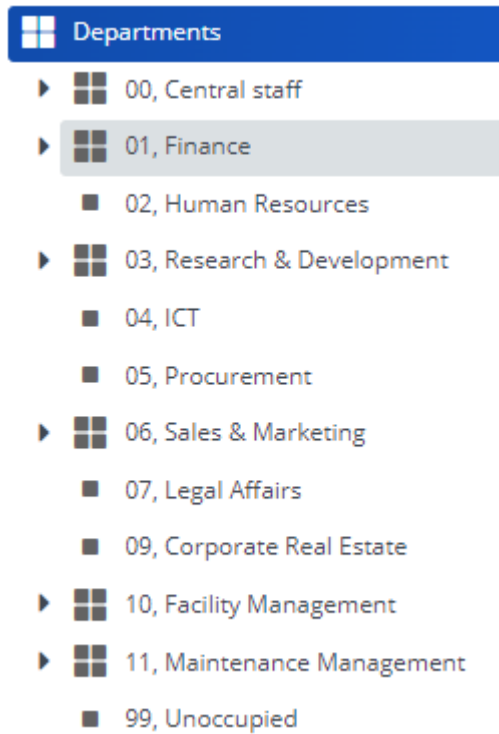
## Element hierarchy


*Planon ProCenter* has the following element types:

- Simple elements
- Hierarchical elements

Simple elements, such as **Personnel**, cannot be broken down in sub elements.

Hierarchical elements, on the other hand, can be divided into sub elements. For example, **Departments**.



The hierarchical elements can be collapsed or expanded. The  symbol in front of a hierarchical element's name indicates the presence of sub elements.

No filter - click to add or show filters

Created by = Search...

**Orders**

- \* 250.00, Standard PPM order reported 2020-9 (9/1/...
- \* 249.00, Heat Exchangers check (6M) (2/1/2016 09:...
- \* 248.00, Standard PPM order reported 2020-8 (8/27...
- \* 247.00, Standard PPM order reported 2020-9 (9/1/...
- \* 246.00, Standard PPM order reported - within 1 w...
- ▶ \* 245.00, Check Air Conditioning Units (1M) (9/1/202...
- ▶ 244.00, Stand up (9/24/2020 09:00)
- ▶ 243.00, Stand up (9/23/2020 09:00)
- ▶ 242.00, Stand up (9/22/2020 09:00)
- ▶ 241.00, Stand up (9/21/2020 09:00)
- ▶ 240.00, Book space (12/18/2020 14:32)
- ▶ 239.00, Book space (12/11/2020 16:12)

Count Expand None All

1
2
3

It is possible that sub elements inherit values from their parent element. This depends on your field configuration.

## Footer bar



The following features are available on the footer bar:

- **Count** - Displays the total number of elements in the list.
- **Expand** - Expands all the sub elements in the element list.
- **All** - Selects all the elements in the element list.
- **None** - Deselects the selected elements.

**Note** Any action that refreshes the element list will collapse the expanded page.

The footer bar also displays pagination. It enables you to navigate between pages if the elements list is divided into multiple pages. Click the arrow buttons to go to the first, previous and last page or click the numbers to go to a specific page.

**Note** If your elements panel consists of a very large data set, please note that clicking the >> arrow to jump to the last page may take some time.

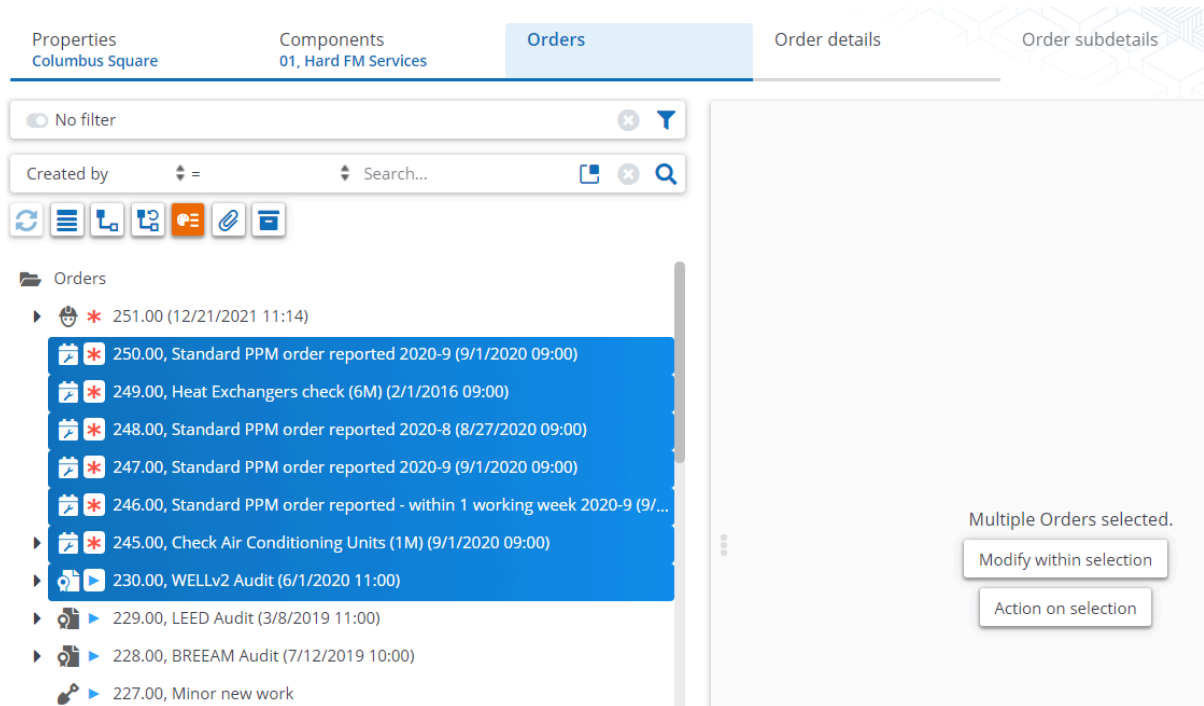
## Action on selection

The **Action on selection** option allows you to perform a certain action or status transition for multiple elements at the same time. This option becomes available in the data panel when you select multiple elements in a TSI.

You can apply action on selection to elements of various system or user-defined types such as main/sub work orders, reservations, and so on.

### Procedure

1. Select multiple elements to which you want to apply the action or status transition.



The screenshot shows a software interface with a navigation bar at the top containing 'Properties Columbus Square', 'Components 01, Hard FM Services', 'Orders' (highlighted), 'Order details', and 'Order subdetails'. Below the navigation bar is a filter section with 'No filter' and a search bar labeled 'Created by' with a search icon. A toolbar with various icons is visible. The main area displays a list of orders under the heading 'Orders'. Several orders are selected, highlighted in blue, including: 251.00 (12/21/2021 11:14), 250.00, Standard PPM order reported 2020-9 (9/1/2020 09:00), 249.00, Heat Exchangers check (6M) (2/1/2016 09:00), 248.00, Standard PPM order reported 2020-8 (8/27/2020 09:00), 247.00, Standard PPM order reported 2020-9 (9/1/2020 09:00), 246.00, Standard PPM order reported - within 1 working week 2020-9 (9/1/2020 09:00), 245.00, Check Air Conditioning Units (1M) (9/1/2020 09:00), 230.00, WELLv2 Audit (6/1/2020 11:00), 229.00, LEED Audit (3/8/2019 11:00), 228.00, BREEAM Audit (7/12/2019 10:00), and 227.00, Minor new work. A context menu is open over the selected items, displaying 'Multiple Orders selected.' and two buttons: 'Modify within selection' and 'Action on selection'.

2. On the data panel, click Action on selection.






The **Action on selection** dialog box appears and displays relevant actions available for the selected elements.

In the dialog box, when selecting the **Show all actions** check box, all actions/status transitions available will be shown (including those that can be applied to some of the other types).

### Action on selection ✕

Show all actions

PPM order ^

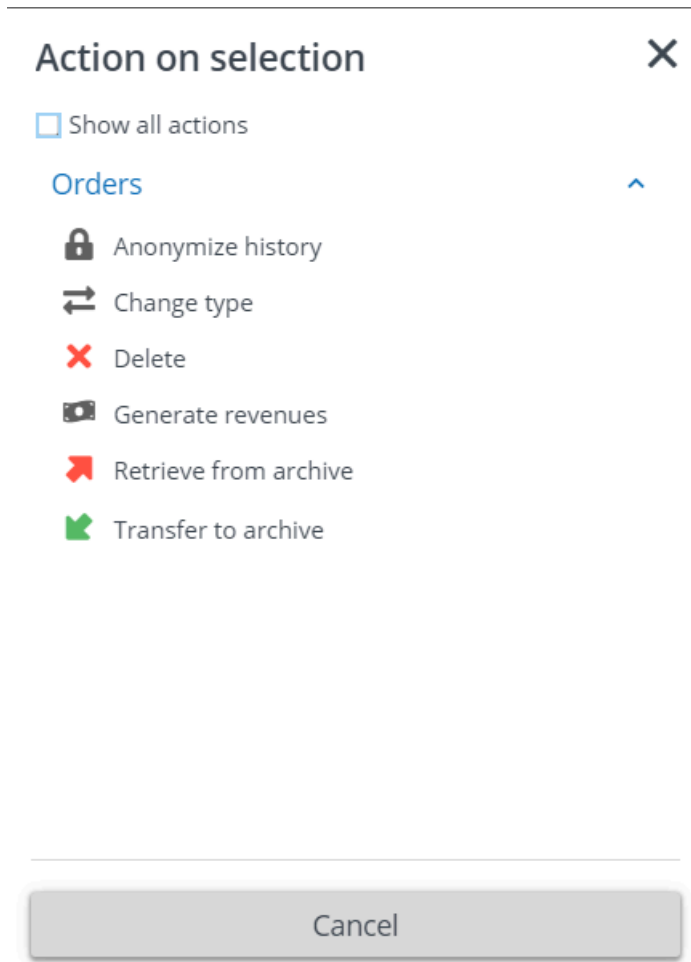
-  Anonymize history
-  Change type
-  Delete
- Generate revenues
-  Retrieve from archive
-  Transfer to archive

Maintenance orders - Status transitions ^

- Administratively completed
- Assigned
- Cancelled

Cancel

If you clear the **Show all actions** check box, only the actions available to all types in the selection will be displayed.



4. Select the action or status transition that you want to apply to the selected elements.

**Note**

Though some actions are not present in a TSI due to authorization, they may be displayed in the **Action on selection** dialog box, for the selected list.

**A Question dialog box appears.**

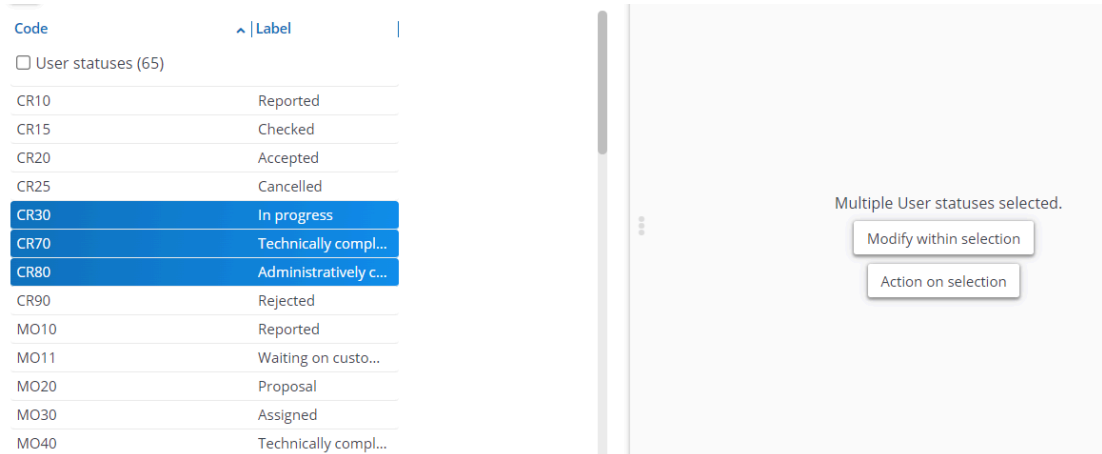
5. Click OK to continue. The items are processed, as displayed by a progress indicator.

A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process, or select the **Select all** check box and then click **Process selection**.

## Modify within selection

The **Modify within selection** option allows you to change the value of a field for multiple elements at the same time. This option becomes available in the data panel when you select multiple elements in a selection level in a TSI. You can change the values of all fields.



## Warning

To use **Modify within selection**, you must select elements of a single type. If a selection contains elements of different types (for example, a work order and a reservation), **Modify within selection** is not possible.

## Procedure

1. Select the elements for which you want to change the field value. For example, the selected personnel have moved to another department and therefore you have to change the Department and Work address fields of these persons.
2. On the data panel, click **Modify within selection**.

## Modify within selection



### General

<input checked="" type="checkbox"/> Code	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Print form	<input type="checkbox"/> Yes	<input type="radio"/> No
Icon	<input type="checkbox"/> No icon	
Mail merge report	<input type="checkbox"/>	

OK

Cancel

3. Select the check box(es) of the field(s) you want to modify and enter the values in the selected fields.

### Warning

It is possible to clear a field for multiple-selected elements. If you want to clear a field for multiple-selected elements, you have to select the relevant check box and leave the field empty.

All fields whose check boxes are selected and in which no values are entered, will be cleared.

4. Click OK to proceed.

The **Question** dialog box appears.

5. Click OK.

A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process, or select the **Select all** check box and then click **Process selection**.



## Select all

If you want to select all items in the elements list at once, you can click **All** at the bottom of the page.

- When you click **All** or press CTRL+A, the root displays an *All selected* status.
- You can click the **Close** button to cancel the selection.
- While **Select all** is active, clicking in the list to select one or more specific items cancels the *All selected* status.

**Note** **Select all** does not act as a filter when navigating to the next level. It works like selecting the root node and then navigating to the next level. For some TSIs, such as Work Orders , you need to specify a filter to be able to navigate to the next level.

## Data panel

The data panel displays the details of the selected element in the elements list. In this example, you can see property data.

The screenshot shows a data panel with four tabs: General, Regions, Characteristics, and Audit info. The 'General' tab is active. The data is organized into sections: General, Address data, Image, and Linked parcels. Fields marked with a red dot icon are mandatory.


General	
Property code	14
Name	Columbus Square
User-defined status	⚡ PR50, Dismantled <span>ℹ️</span>
Parent level	<span>📄</span>

Address data	
Address	Columbus Square
House number	8
ZIP code	N6 5TR
City	London <span>ℹ️</span> <span>📄</span>
District	London
Country	United Kingdom <span>ℹ️</span> <span>📄</span>
Time zone	Europe/London <span>ℹ️</span> <span>📄</span>

**Image**

Image  ✖️ 🔄 📄 📁

**Linked parcels**

Parcel.Code	Parcel.Name	St...	End date
-------------	-------------	-------	----------

Detailed information about the selected element is grouped by headers in the data panel and the information is spread over different tabs. For example, General > Address data. This allows you to find the information you need about the selected element easily.

On the data panel, fields marked with a red dot icon are mandatory fields. These fields must be filled in. If not, the changes cannot be saved.

The changes you made to the element data in the data panel can be saved or canceled.

Some TSIs can have different data views. You can switch views on the upper right, just below the selection levels and steps. For example, **Data view** and **CAD Integrator**.

No filter

Name Contains Search...

Property.Property c... | Floor.Floor.C... | Space number | Name

Spaces (>100)

Property	Floor	Space number	Name
14	01	1.53	Work & meeting area
14	01	1.54	Office
14	01	1.33	Office
14	01	1.32	Office
14	01	1.43E	Open plan consultation
14	01	1.20	Conference room
14	01	1.47	Shaft
14	01	1.48	Shaft
14	01	1.49	Lift
14	01	1.50	Restroom
14	01	1.51	Restroom
14	01	1.52	Restroom
14	01	1.45	Storage
14	01	1.44	Storage
14	01	1.43	Corridor
14	01	1.19	Conference room
14	01	1.18	Conference room

CAD Integrator

14 Columbus Square / 01 First

10 m

## Panel resizing

## Panel resizing

It is possible to resize the width of the data panel. The size of the data panel is stored for each step.

Panels have a minimum size and are dependent on the screen resolution. If you use a computer with smaller screen resolution or if the screen is minimized, the data panel size will remain the same but the elements panel will be resized. The handles shown in the image below allows you to resize the panel.

The screenshot displays a software interface with a main data panel on the left and a right-hand sidebar. The data panel is divided into several sections: 'General', 'Address data', 'Image', and 'Linked parcels'. A blue vertical bar with a white double-headed arrow is positioned on the left edge of the data panel, indicating a resize handle. The sidebar on the right contains a list of actions and links, including 'Building', 'Add', 'Add sub', 'Copy', 'Delete', 'Change type', 'Transfer to archive', 'Retrieve from archive', 'Create defaults and pre...', 'Anonymize history', 'Links', 'Link Standard Order', 'Link parcels', 'PermitstoWorkProperty', 'Status transitions', 'Dismantled', 'Disposed', 'Show flow diagram', 'Report', and 'Report'.

**General**   Regions   Characteristics   Audit info

**General**

- Property code: 26
- Name: 1420 5th Avenue, Suite 555
- User-defined status: PR30, In management
- Parent level:

**Address data**

- Address: 1420 5th Avenue, Suite 555
- House number: 555
- ZIP code: WA 98101
- City: Seattle
- District:
- Country: United States
- Time zone: US/Pacific

**Image**

Image:

**Linked parcels**

Parcel.Code	Parcel.Name	St...	End date
Nothing found			

**Building**

- + Add
- + Add sub
- Copy
- Delete
- Change type
- Transfer to archive
- Retrieve from archive
- Create defaults and pre...
- Anonymize history

**Links**

- Link Standard Order
- Link parcels
- PermitstoWorkProperty


**Status transitions**

- Dismantled
- Disposed
- Show flow diagram

**Report**


- Report

## Uploading a file

On the data panel, fields with the  icon indicate that you can upload files into Planon. Upload enables you to add additional related information in any file format such as pdf, jpg or docx. The procedure to upload a file is similar across Planon.


To upload a file

### Procedure

1. Go to the field with the Upload option.
2. In the Upload field, you can drag a file directly from your local machine or browse to and select a file by clicking the **Upload**  icon.

### Note

You can drag only one image at a time and only from your local machine.

3. If you click the **Upload**  icon, an Upload file dialog box will appear.
4. Click the Choose file button to browse and select a file from your local drive.
5. Click OK.

**The file is now uploaded to the WebDAV location specified in System Settings.**

After upload,

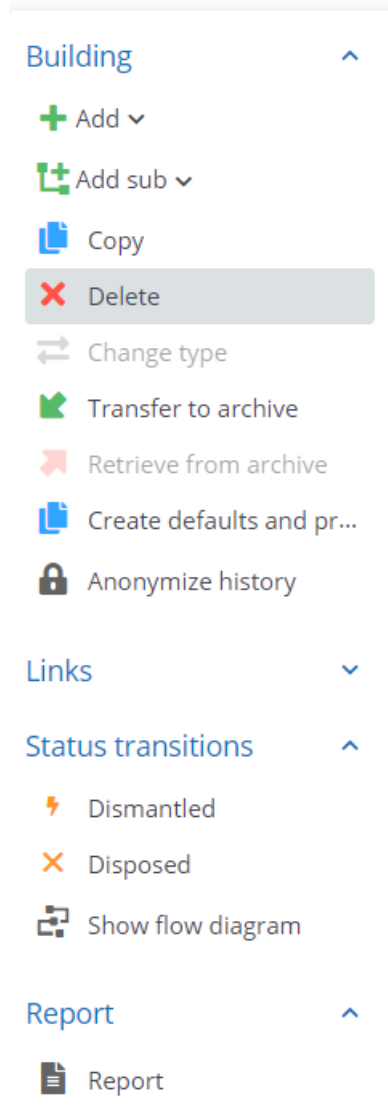
- For image type fields, the image is directly displayed in the data panel. You can use the **Clear / X** option to remove it. However, it will still reside in the WebDAV location.
- For document type fields, the **View** button is displayed. Depending on your browser settings, this button enables you to download or view the file.

## Action panel

The action panel is available on the right and consists of all the actions that can be performed on a selected element.

Common actions available are **Add/Add sub, Copy and Delete**. The actions you see on the actions panel may differ and depend on the TSI and the business object you select.

This image displays the actions available in the TSIs.



---

Copy  
Delete  
Change type  
View status flow

---

## Copy

Copying an element is possible, if you have the appropriate authorization. When an element is copied, most corresponding data is copied, except the data that must be unique like the element code.

## Delete

Deleting an element is possible, if you have the appropriate authorization. Planon ProCenter asks you for a confirmation before an element is actually deleted.



## Change type

Given the appropriate authorization, you can change the type of some elements.

For example, if you have to change the property type from *Wing*, to *Complex*, it can be done by using the **Change type** action.

**Change type** is only possible:

- For business objects for which it is possible to create user-defined business objects.
- If the action is available on the action panel.
- If both business objects have the initial (default) status.

**Note**For more information, see [Field definer](#) .

## View status flow

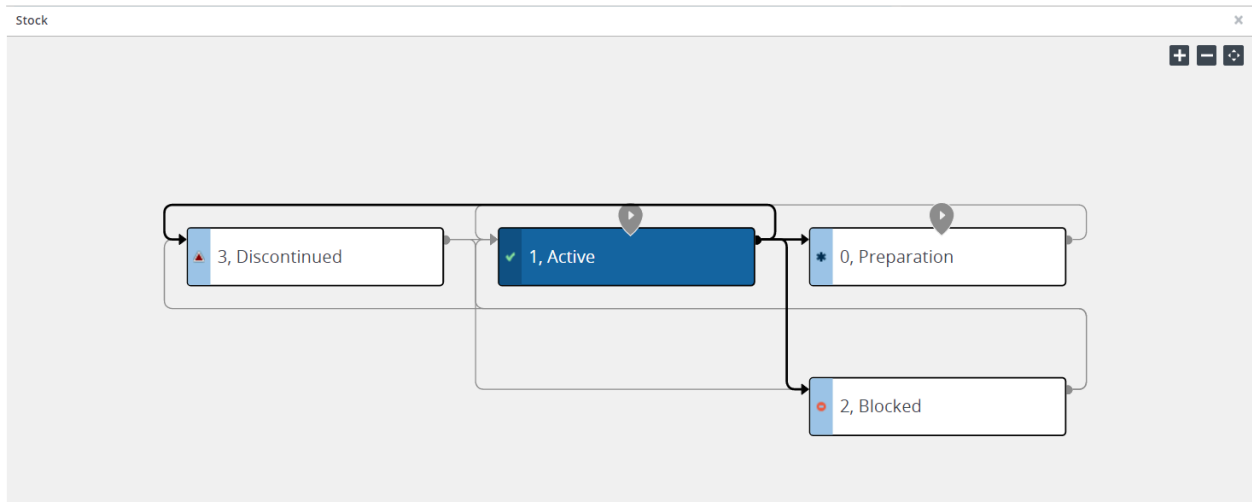
In Planon Web Client, you can view the complete status flow and the possible status transitions of elements such as, Reservations, Orders, Visitors, Contracts and so on.

The status flow diagram displays the current status and the possible transitions of a selected element. You can also view the initial status(es) and the status icons. The three buttons on the top right of the panel allow you to zoom in, zoom out and to perform a zoom-to-fit of the flow diagram.

To view status flow of an element:

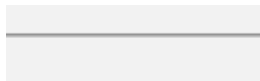
- Select an element in the element list panel.
- Click **Show Status flow** on the action panel.

The Status flow diagram appears on the view panel.



See this table, for a description of the components of the status flow diagram.

### Components



### Description

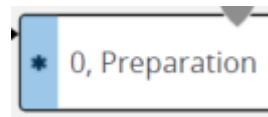
The blue block indicates the current status of the element.

The black arrow in the status flow indicates the current status transition. However, the grey arrows indicate possible status transitions of the selected element.

The Grey lines indicate transitions that are currently not possible within the status flow.

The bend in the line indicates from where the transition is coming.

## Components




## Description

The blue bar in the status flow block displays the status icon. Here, the star indicates the **Preparation** status.

This is the initial status marker. An element can have multiple initial statuses in a flow. You can start the element from any of these initial statuses.

## Searching / filtering

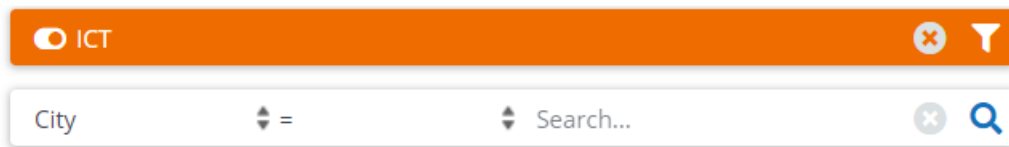
In Planon Web Client, searching can be done in various ways.

 **Search:** This button is available at the top right of the screen and it provides a quick access for searching. Note that this feature is available only in some modules.

When you use this search option, it takes priority over an existing filter. Clicking the **Refresh** button will display the filter results again.

**Note** Use CTRL+space to search for an element.

### Filter and search bar



The filter and search bars are available above the element list. You can define a search query using the search bar and then display data that is only relevant to you. The available search possibilities depend on the element you are currently working with.

You can use one specific field to search on. If required, you can also select a different search field, select an operator and specify a value. The following table describes the search operators in detail.

- 
- Search operators
  - Filter types
  - Using filters
  - Date-time operators
  - Relative filters using macros
  - Editing a filter
  - Copying a filter
  - Previewing changes in the existing filter
  - Deleting a filter
-

## Search operators

### Operator

<, ≤, =, ≥, >

<>, <> or empty

%searchkey%

—

Contains

Does not contain

Contains a value

Does not contain a value

Starts with

Does not start with

Does not start with or is empty

Ends with

Does not end with

Does not end with or is empty

In

Not in

Not in or empty

Between

### Description

Logical operators that compare the search field with the search value.

Operator that enables you to search for entries containing (parts of) the specific word (search key). You can use multiple search keys to fine-tune your result.

The underscore can be used as a wildcard for a single character.

H\_t finds: Hat, Hut, Hit.

Operators that search for the presence of the search value in the search field.

Operators that search for the presence of any value in the search field.

Operators that search for the presence of the search value at the beginning of the search field.

Operators that search for the presence of the search value at the end of the search field.

Operators that search for the presence of a set of search values in the search field.

Operators that search for a range of values in the search field. It includes both the start and end values.

**Note** For orders, using the search operator **Between** is not possible for alphanumeric fields containing only digits because it throws off sorting. To work around this issue, do not filter on **Number**, but add **No.** (SysOrderID) to the layout to filter on the (main) order.

## Filter types

The following filters are used in Planon ProCenter.

- **Personal filters:** Personal filters for personal use can be added, managed and activated by the end user.
- **Temporary filter:** As the name suggests, a temporary filter is created for a current search and disappears when you click on any other filter. If you give a name to a temporary filter and save it, it becomes a personal filter.



- **Permanent filter:** A filter created with search criteria for a quick data selection in the elements list. Typically, your Application manager manages permanent filters.

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Using search operators

Examples of using multiple search operators

---

## Using search operators

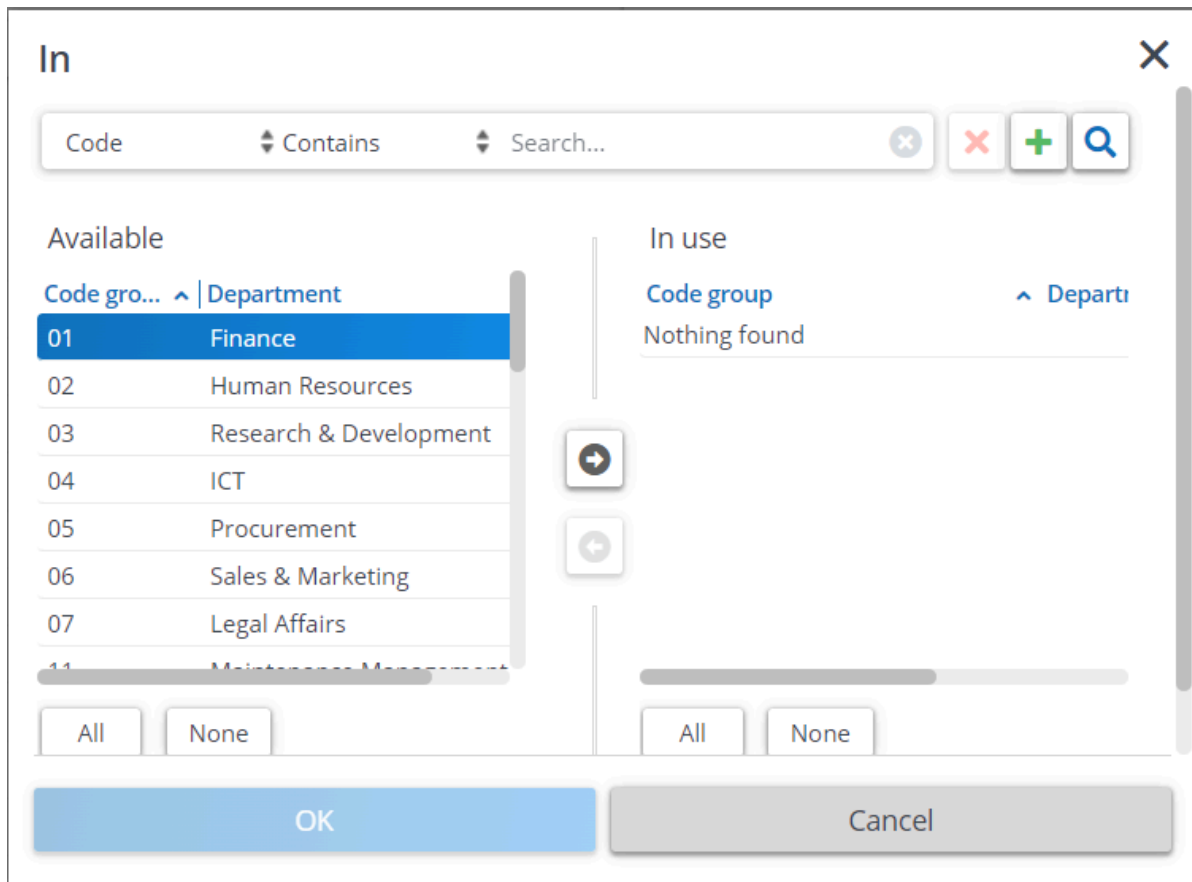
The following is an example for using the **In** operator in the Personnel TSI. Go to **Personnel**.

### Procedure

1. In the search bar select Department.
2. In the next column, select the In operator.



Click the  button to open the following dialog box.



Select the departments you want to include in your selection, move them to the **In use** section and click **OK**.

All persons belonging to the Central staff and Finance department are now displayed.

### Warning

Contrary to filters (refer to [Using filters](#)) it is not possible to save search queries that you perform via the search bar.

In addition, when performing a search request via the search bar, you can only select from a

limited number of search fields. With filters, you can search on almost any field of an element.



## Examples of using multiple search operators

Order **154** contains **Order group 01.02** and **Property 14**. The following are the examples displaying the output when using different search operators with an AND/OR filter:

### Example 1:

Filter on: Order Group = 01.02, Electrical **AND** Property = 14, Columbus square.

**Result:** Order 154 is shown in the elements list.

The screenshot displays the 'Orders' application interface. At the top, there are tabs for 'Properties', 'Components', 'Orders', 'Order details', and 'Order subdetails'. Below the tabs, there is a search bar with 'Example 1' entered. A filter bar shows 'Created by' and a search field. Below the filter bar, there are several icons for actions like refresh, list, print, etc. The main area shows a list of orders under the 'Orders' folder. The list includes several orders with status icons (checkmarks or crosses) and descriptions. The order '154.00, Repair/replace broken light switch' is highlighted in blue. Below the list, there are buttons for 'Count', 'Expand', 'None', and 'All'. On the right side, there is a detailed view for the selected order. It shows fields for 'Property' (14, Columbus Square), 'Space' (1.14, Office), 'Asset ID', and 'Number' (154.00). Below this, there is a section for 'Service request data' with 'Description' (Repair/replace broken light switch) and a 'Comment' field. At the bottom of the details view, there are fields for 'Order group' (01.02, Electrical), 'Major?' (radio buttons for Yes and No, with No selected), and 'WBS item'.

### Example 2:

Filter on: Order group Not In or empty 01.02, Electrical **AND** Property = 14, Columbus square.

**Result:** Order 154 is not shown in the elements list.

Order 154 belongs to Order group 01.02 and Property 14. Here one of the filter specifies Not In (Order group 01.02) or empty, Order 154 is not listed in the set of records displayed although it belongs to Property 14. As we used **AND** filter the result should satisfy both statements(filters).

# Orders

The screenshot shows the 'Orders' application interface. At the top, there are tabs for 'Properties', 'Components', 'Orders' (selected), 'Order details', and 'Order subdetails'. A search bar at the top right shows 'Today' and a notification icon. Below the tabs, there is a search bar with 'Example 2' and a filter icon. A 'Created by' dropdown and a search field are also visible. A list of orders is shown, with '155.00, Too hot / too cold' selected. Below the list are buttons for 'Count', 'Expand', 'None', and 'All', and a pagination control showing '1 2 3 4'. The right-hand side shows a detailed view of the selected order, including fields for 'Property' (14, Columbus Square), 'Space' (3.25, Office), 'Asset ID', 'Number' (155.00), 'Service request data' (Description: Too hot / too cold), 'Order group' (01.01, Mechanical), and 'Major?' (No).

### Example 3:

Filter on: Order Group = 01.02, Electrical **AND** Property Not In or Empty 14, Columbus square.

**Result:** Order 154 is not shown in the elements list.

**Note** The orders shown on the elements list are main orders, however, they are grayed out and their sub-orders show the correct filter data. The records displayed take into account the **Show related work orders** button.

# Orders

The screenshot shows the 'Orders' application interface. The top navigation bar includes 'Properties', 'Components', 'Orders' (selected), 'Order details', and 'Order subdetails'. A search bar at the top left contains 'Example 3'. Below it, a filter bar shows 'Created by' and a search field. A toolbar with various icons is visible. The main list on the left shows a hierarchy of orders, with '176.01, Lift not working\_3 (1097L)' selected. The right pane displays the details for this order, including 'General', 'SLA', 'Duration / Costs', 'Internal notes', 'Communication logs', and 'Audit info'. The 'General' section shows 'Number: 176.01', 'Order data' (Standard order: MM051\_01, Lift not working; Description: Lift not working\_3 (1097L)), and 'Comment' (32768 characters remaining). The 'Order group' is '01.02, Electrical', which is highlighted with a red box. Other fields include 'WBS item', 'Priority: FM-W1, Within 1 week', and 'Sign-off required: No'.

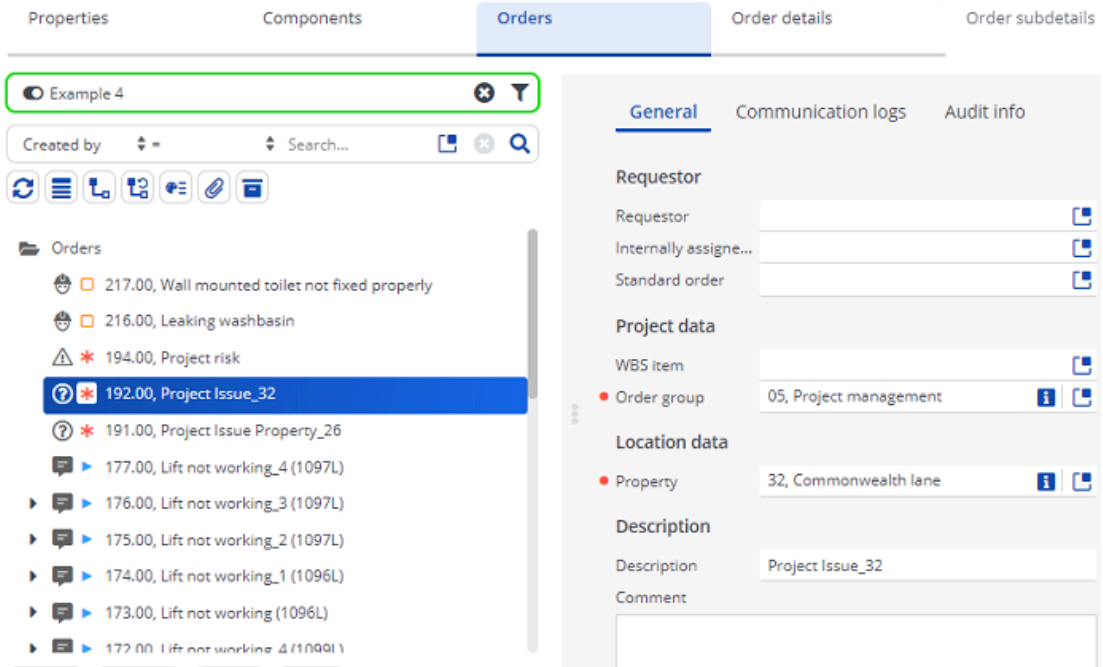
## Example 4:

Filter on: Order group Not In or Empty 01.02, Electrical **AND** Property Not In or Empty 14, Columbus square.

**Result:** You see that none of the displayed records show for Property 14, and the order group 01.02, Electrical.

**Note** However, as this is an **AND** statement, it should have removed only those records that include both statements in the filter.

# Orders



The following table clarifies the reason for output records when using **AND/OR** filters for **Not in or empty** search operators

Number of records	Order group	Property	Reason for resulted record
-------------------	-------------	----------	----------------------------

Below are the set of records we have

1	01.03	14
2	01.03	15
3	01.02	14
4	01.02	15
5		14
6		15
7	01.02	
8	01.03	

Filter on: Order group *Not In or Empty* 01.02, Electrical **AND** Property *Not In or Empty* 14, Columbus square

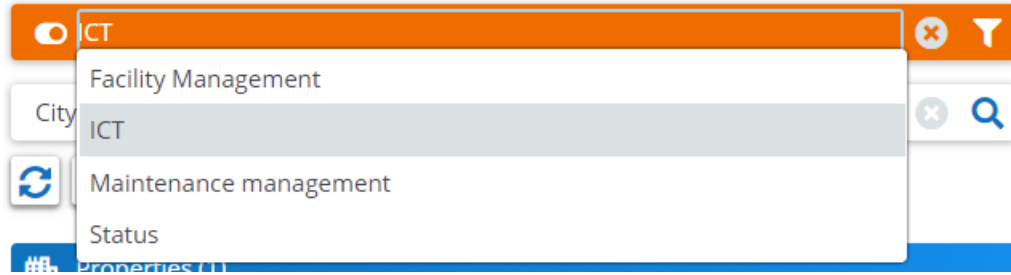
2	01.03	15	Not in both (Order group 01.02 and Property 14)
6		15	Empty Ordergroup and not in Property 14

Number of records	Order group	Property	Reason for resulted record
8	01.03		Not in Order group 01.02 and empty property
Filter on: Order group <i>Not In or Empty</i> 01.02, Electrical <b>OR</b> Property <i>Not In or Empty</i> 14, Columbus square			
1	14	01.03	Not in Order group 01.02
2	15	01.03	Not in both
4	15	01.02	Not in Property 14
5	14		Empty Order group field
6	15		Applied both (not in Property 14, empty order group)
7		01.02	Empty property field
8		01.03	Applied both (empty prperty, not in Order group 01.02)

## Using filters

A filter contains one or more selection criteria on the basis of which the user can select the data quickly and easily. You can save the filters in Planon Web Client, and use them without having to specify the selection criteria again.

You can activate a filter by selecting it from the filters pick list. Different filters are available at every selection level. On the filter bar, you can view, add, delete, edit and copy a filter by clicking the **Filter option** button. You can switch between filters or select **No filter**, if you do not want to use any filters.



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Using the date-time filter criteria

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## Using the date-time filter criteria

You can filter on date and time using the date-time filter criteria. The date-time filter allows you to set a filter on dates as well as the required time if necessary. When you select a date-time field in the **Select filter criteria** dialog box and click the calendar button, you will see that the current time is displayed (as the '=' operator is selected by default.)

For the time values set for each operator available in the date-time filters across the application, refer to the table below.

**Note** Click the **Today** button to set the current day, date and time in the date-time field in the **Select filter criteria** dialog box.

## Date-time operators

Operator	Time value
=	Current time
<=	23:59
>=	00:00
>	00:00
<	23:59
Between	00:00(FROM) – 23:59(TO)
<>	Current time

---

Toggle a filter on/off  
Adding an AND/OR filter  
Using the AND/OR filter  
Grouping filters

---



## Toggle a filter on/off

The Filter on/off button allows you to toggle the filter on/off. You can also save the filter that you created earlier for future use.

The Filter button allows you to switch on or switch off the current applied filter while keeping it selected in the filter bar.

**Note** When you create a new filter, it is switched on by default.

## Adding an AND/OR filter

Planon ProCenter allows you to create filters and group them with AND/OR relations so that you can do an advanced filtering of data.

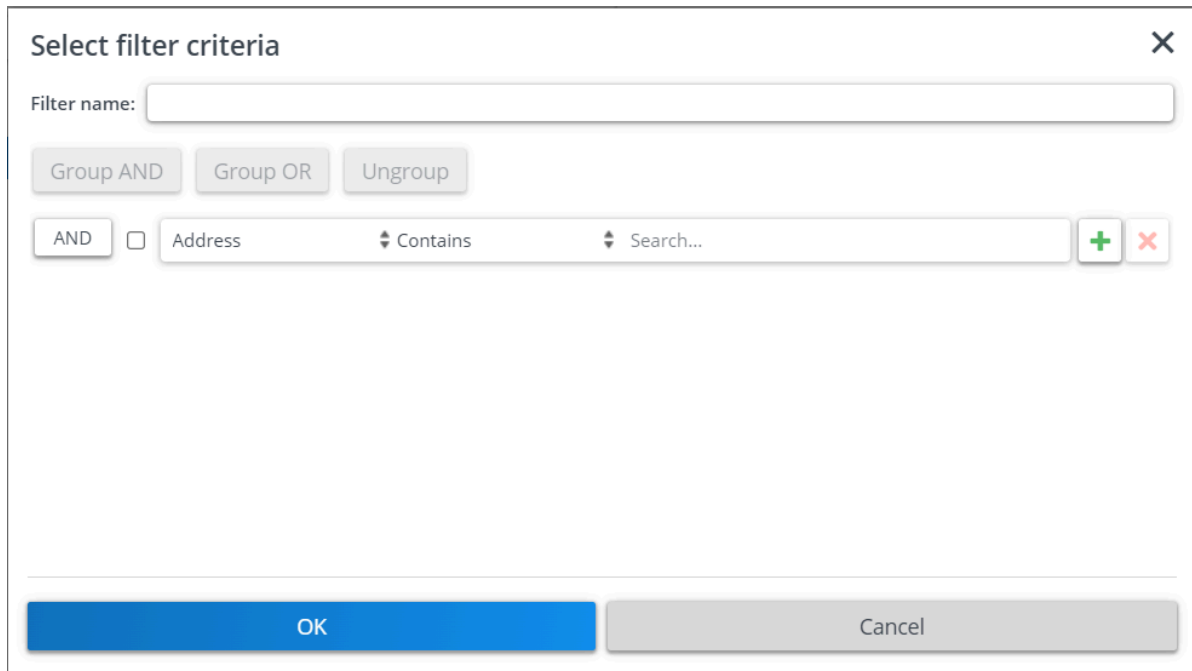
The filtering is available at every selection level and step in Planon ProCenter.

### Procedure

1. Select an element for which you want to specify a filter and click on the Add filter button on the filter bar.

For example, in **Personnel Management > Personnel**, click **Add filter** on the filter bar.

The **Select filter criteria** dialog box appears.



Two types of filtering methods are available:

- **AND** filter: This type of filter allows you to add multiple filtering criteria for your search. AND is selected by default.

On clicking the AND button, it switches to OR.

- **OR** filter: This type of filter allows you to set two different filter criteria for your search.

The filter criteria bar contains:

- A check box for grouping the filter criteria. Select the check box and click the **Group AND/Group OR** button.

- A list of fields available on the selected business object.

- The operator you want to use for filtering.

- Specific data available on the field that you selected for filtering.

- A plus button for adding additional filter criteria.

- A cross button for deleting the existing filter criteria.

## Using the AND/OR filter

### Procedure

1. When you want to use more than one filter criteria, use the AND button.  
To create an OR filter, click the **OR** button.
2. Enter a name for the filter in the Filter name field.  
If you do not give a name to the filter, it will be treated as a temporary filter and is deleted when you deactivate it.
3. Select the field for which you want to set a filter. For example, Person.
4. Select an operator, for example, '='.
5. Fill in the person's name you want to filter on.  
If you want to add additional filter criteria, click the plus button and enter the filter options.
6. Click OK. An AND/OR filter is created.

## Grouping filters

You can group the AND/OR filters. The filter criteria are grouped by selecting two or more criteria.

### Procedure

1. Add multiple filter criteria by clicking the plus icon.

### Select filter criteria ✕

Filter name:

<input type="checkbox"/> AND	<input checked="" type="checkbox"/>	Country	⇅ =	⇅ Search...	<input type="button" value="📄"/>	<input type="button" value="+"/>	<input type="button" value="✕"/>
	<input checked="" type="checkbox"/>	ZIP code	⇅ Contains	⇅ Search...		<input type="button" value="+"/>	<input type="button" value="✕"/>
	<input type="checkbox"/>	City	⇅ In	⇅	<input type="button" value="📄"/>	<input type="button" value="+"/>	<input type="button" value="✕"/>

---

2. Select the check boxes of the filter criteria that you want to group.
3. Click Group OR. The selected criteria are grouped into a subset.
4. To ungroup, click the Ungroup button.

### Note

You can group the filter criteria (only) up to three levels.

5. Click OK. The filter is now active.

### Note

You can also add a filter on system fields such as System code, Update count, and so on.

## Relative filters using macros

In some cases it may be convenient to define filters that enable you to filter out variable field data instead of fixed field data. This is called making relative filter selections.

Relative filter selections are made by applying macros in filter definitions. Examples of variable field data are the current date-time and the current user.

Using macros in filter definitions on variable data saves you the trouble of having to adapt your filter definition every time you apply the filter.

A relative filter selection can consist these parts.

- A primary argument that defines the current date, current time, current user, current person or current property set.
- A secondary argument that defines the period of the relative filter (only applicable in date-time related filters).

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Relative date-time filters

Primary and secondary arguments

---

## Relative date-time filters

In the **Service Manager** TSI, you may want to know, on a regular basis, which orders have to be carried out on a particular day.

Or in the **Personnel Management** TSI you may want to retrieve the visitors for the current week or day.

For this purpose you can use a selection by date field.

It would be convenient if you were able to save a recurring selection such as this one, but if you enter the date the 'usual' way, you will need to change it each time you want to apply the selection.

You can define a relative filter from the current date-time in the date-time field. Here, relative means with respect to the current date and time. The system date is used for determining the current date and time.

A relative selection on date-time may consist of a primary argument that defines the current date and time and a secondary argument that defines the period of the relative filter.

Secondary arguments are entered after the primary argument. The two arguments are separated by a space. The secondary argument is followed by a number that indicates the number of times the specified period should be applied (e.g. &D5, &D#5). Both positive and negative numbers can be used. Note that a positive number is not indicated by a + sign.

Primary and secondary arguments are available in Planon ProCenter for date-time filter macros, check [Primary and secondary arguments](#).

## Primary and secondary arguments

Primary argument	Description
&DATETIME	<p>Relative filter on the current (system) date-time. Can be used in date-time fields and in date fields.</p> <p><b>Rounding of time:</b> You can round the start and end time using the following secondary macros: <b>&amp;R15, &amp;R30, &amp;R60.</b></p> <p>&amp;R15 - rounds to the nearest 15, 30, 45, 00 hours. &amp;R30 - rounds to the nearest 30 and 00 hours &amp;R60 - rounds to the nearest 00 hours.</p> <p><b>Example:</b> If the current time is 11:36 hrs, see how the time is rounded off using the macro(s):</p> <p>&amp;datetime &amp;h1 &amp;R15 - the time is rounded to 12:45. &amp;datetime &amp;h1 &amp;R30 - the time is rounded off to 13:00. &amp;datetime &amp;h1 &amp;R60 - the time is rounded off to 13:00.</p>
&TIME	<p>Relative filter on the current (system) time. Can be used on time fields. For example, Visitor's arrival/ departure time.</p> <p>You can round the start and end time using the following secondary macros:</p> <p><b>&amp;Time &amp;R15</b> : rounds to the nearest 15, 30, 45, 00 hours. <b>&amp;Time &amp;R30</b> - rounds to the nearest 30 and 00 hours <b>&amp;Time &amp;R60</b> - rounds to the nearest 00 hours.</p> <p><b>Example:</b> If the current time is 11:58 hrs, see how the time is rounded off using the macro(s): <b>&amp;Time &amp;R15</b> - rounds off to 12:00 hrs. <b>&amp;Time &amp;R30</b> - rounds off to 12:00 hrs. <b>&amp;Time &amp;R60</b> - rounds off to 12:00 hrs.</p>
&STARTOFDAY	Relative filter on the current (system) date (assumes time = 00:00). Can be used in date-time fields and in date fields.
&ENDOFDAY	Relative filter on the current (system) date (assumes time = 23:59). Can be used in date-time fields and in time fields.
&REFERENCEDATE	Relative filter on the current reference date.
Secondary argument	Description
&Y (or: &YEAR)	Relative filter for defining a period in years.
&M (or: &Month)	Relative filter for defining a period in months.



Secondary argument	Description
&W (or: &WEEK)	Relative filter for defining a period in weeks.
&D (or: &DAY)	Relative filter for defining a period in days.
&H (or: &Hour)	Relative filter for defining a period in hours.
&N (or: &Minute)	Relative filter for defining a period in minutes.
&Monday	Relative filter for defining a period in days following Monday in the week of the primary argument (= Monday before the primary argument.)
&FirstOfMonth	The first day of the month of the primary argument. This relative filter can be used, for example, to filter out the orders of the current month.
&FirstOfQuarter	The first day of the quarter of the primary argument. A filter on the first day/date of the current quarter of the current year preceded with <b>&amp;datetime</b> primary argument.
&FirstOfYear	A filter on the first day/date of the current year. This filter returns 1-1-THISYEAR when preceded with <b>&amp;datetime</b> primary argument.

### Warning

Secondary arguments must be preceded by a primary argument.

### Examples of relative filters

- **Visiting date = &Startofday**: shows today's visitors
- **Visiting date between &Startofday and &Startofday &D1**: shows the visitors of today and tomorrow
- **&Startofday &Monday3** (or **&Startofday &Monday &D3**) means Thursday (00:00 h) of the week in which the current day falls.  
Note that a week starts on Monday, so if today is Sunday, this macro means last Thursday. If today is Monday, the macro means this Thursday.
- **&Startofday &FirstOfMonth-1** (or **&Startofday &FirstOfMonth &D-1**) means the last day of the previous month.
- **&Startofday &FirstOfMonth9** (or **&Startofday &FirstOfMonth &D9**) means the 10th day of the current month.

Below is an example of a relative filter set on the **Visiting Date** field of a visitor.

- **&datetime &Firstofquarter** : shows October 1, 2018 when executed in Q4 2018.
- **&datetime &Firstofyear**: shows January 1, 2018 when executed in Q4 2018.

---

### Select filter criteria ✕

Filter name:

<input type="checkbox"/> AND	<input type="checkbox"/>	Name	Starts with	Search...	<input type="button" value="+"/>	<input type="button" value="✕"/>	
	<input type="checkbox"/>	Date <small>ownership</small>	=	Search...	<input type="button" value="📅"/>	<input type="button" value="+"/>	<input type="button" value="✕"/>
	<input type="checkbox"/>	Name	Starts with	Search...	<input type="button" value="+"/>	<input type="button" value="✕"/>	

---

**Warning**

Macros cannot be used in combination with fixed dates! So, a relative filter that includes an actual date will result in an error.

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Special relative filters

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## Special relative filters

There is a number of special primary arguments that enable you to define relative filters for specific purposes. For a description of these filters, see the table below.

Primary argument	Description
&DATASECTION	Can be used to define a relative filter on the current property set.
&CODEGEN	<p>In <b>Field definer</b>, authorized users can use the &amp;CODEGEN macro to automatically generate codes (with max. length of 10 characters). Codes can be generated for business objects such as properties, persons and addresses.</p> <p><b>Tip</b> For more information on using the &amp;CODEGEN macro, refer to <a href="#">Field definer</a>.</p>
&USERNAME	Can be used to define a relative filter on the current user.
&USERID	Can be used to define a relative filter on the user ID code of the current user.
&PERSON	<p>Can be used to define a relative filter on the person included in the Personnel Management TSI who is linked to the logged-on user.</p> <p>Authorized users can link a user ID to a person from the <b>Personnel</b> TSI in Authorization &gt; User groups.</p>
&Person.Property	Use this macro to display or filter on the property of the user linked to the account that is used. This macro only works for a property reference field.
&Person.Space	Use this macro to display or filter on the space of the user linked to the account that is used. This macro only works for a space reference field.
&Person.Address	Use this macro to display or filter on the address of the user linked to the account that is used. This macro only works for an address reference field.
&Person.Department	Use this macro to display or filter on the department of the user linked to the account that is used. This macro only works for a department reference field.
&Person.CostCenter	Use this macro to display or filter on the cost center of the user linked to the account that is used. This macro only works for a cost center reference field.

## **Editing a filter**

### Procedure

1. On the filter bar, select a filter you want to edit from the drop down list.
2. Click on the Edit filter button.  
The Select filter criteria window appears.
3. Edit the filter name or filter settings in this window.
4. Save the changes by clicking the OK button.

## Copying a filter

### Procedure

1. Select the filter you want to copy from the list in the filter bar.
2. Click Copy filter.

**The filter is copied and the name of the original filter appears with a number enclosed in parenthesis appended to it.**

### Note

The copy filter button allows you to copy both your own user-defined (personal) filters and any predefined TSI user filters managed by your Planon administrator. Once you copy a predefined TSI user filter, the copy effectively becomes a personal filter.

### Previewing changes in the existing filter

When you modify an existing filter by changing the filter criteria or adding more filter criteria, you can view the changes by clicking the Preview button in the **Select filter criteria** dialog box.

If the search results are satisfactory, save the changes on the filter and make it a new regular filter renaming it. You can also choose to save the changes on the same existing filter.

### Warning

You cannot copy a temporary filter.

## Deleting a filter

### Procedure

1. Select the filter you want to delete from the pick list in the filter bar.
2. Click on the Delete filter button.

**Planon ProCenter asks you to confirm before the filter is actually deleted.**

## 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 were 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](#).

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

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Communication logs - reference date

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## Communication logs - reference date

Using a reference date with communication logs allows you to only view communication logs that are valid on that date. The reference date is set via **Reference date** button in the **Planon ribbon** and it is the current date by default. Clicking **Reference date** causes a date picker to appear from which you can select another date that is in the past or in the future.

You can deactivate the reference date by clicking **Deactivate reference date** in the Planon ribbon.

## Reporting

The Reports tool is available on all the TSI selection levels and steps. It allows you to create reports for the selected data.

There are ready-made user report definitions available in the **Reports** dialog box > **User reports** tab. You can create three types of user reports: **Report**, **Data only**, **Mail merge**.

On some selection levels and steps, there are also system reports available on the **System reports** tab. System reports are the report definitions programmed by Planon. These definitions cannot be modified. You can, however, modify the report settings, if required.

Prior to creating a report, you must first select the TSI > selection level > selection step corresponding to the subject of the report. Data corresponding to these elements will be included in the report. For a description of the report field settings, refer to [Report settings](#).

For example, if you want to generate a report on available workspace, go to Spaces & Workspaces > Workspaces and click **Report**.

### Note

- The report settings you configure are stored per report and per individual user. Next time you log in your personal settings are loaded again.
- When using the Planon application for creating reports, check your browser's pop-up blocker settings. The Planon site needs to be a part of the allowed sites of your browser's pop-up blocker otherwise reporting functionality, such as previewing a report, will not work properly.

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Saving reports

Save options for reports

Exporting data to XLS / XLSX

Previewing & printing reports

Report settings

---

## Saving reports

This topic describes how you can save reports in Planon ProCenter . Reports can be saved in several formats, such as CSV, PDF, HTML and XLS.

### Procedure

1. Select the report you want to generate.
2. On the action menu, click Save as.

#### **The Save as dialog box appears.**

Refer to [Save options for reports](#) and select the appropriate options in the dialog box.

3. Click OK.

## Save options for reports

Complete the following fields when saving a report:

Field	Description
Output	Specify the path where the report must be saved.
Save as	<p>From the list, select the format in which you want to save the report. The available formats depend on the type of report you select.</p> <p>The following file formats are available for user reports:</p> <ul style="list-style-type: none"><li>• CSV</li><li>• HTML</li><li>• PDF</li><li>• XLS: Data only</li><li>• XLSX: Data only</li></ul> <p>The following file formats are available for system reports:</p> <ul style="list-style-type: none"><li>• CSV</li><li>• HTML</li><li>• PDF</li><li>• XLS: Data only</li><li>• XLS: Formatted Single Sheet</li><li>• XLS: Formatted Multiple Sheet</li><li>• XLSX: Data only</li><li>• XLSX: Formatted Single Sheet</li><li>• XLSX: Formatted Multiple Sheet</li></ul>
Delimiter	<p>Select a special character to separate the fields in the saved report. You can choose between semicolon (;), comma (,) and &lt;tab&gt;.</p> <p>Available only for CSV output.</p> <p>Delimiters used inside values are <i>escaped</i> to prevent interpretation issues when importing the CSV into other programs (such as Excel).</p>
Output line break characters as	<p>Allows you to give line break characters such as, Space, LF (Line Feed), CR (Carriage Return), CR\LF, &lt;BR&gt;.</p> <p>CR and LF are used to mark a line break in a text file. Windows uses CR/LF, Unix uses only LF and the MacOS (pre-OSX Macintosh) uses only CR.</p> <p>Available only for CSV output.</p>
Include header	<p>Select <b>Yes</b> to include a header.</p> <p>Available only for XLS, XLSX and CSV output.</p>
Wrap text for Excel	<p>Select <b>Yes</b> if you want to wrap the text in the cell output.</p> <p>This feature is only available for XLS- and XLSX <b>data only</b> formats.</p>



## Exporting data to XLS / XLSX

When exporting data from Planon to Excel, the data is exported mapping the Planon format to Excel. This enables users to perform calculations in Excel without having to first reapply formatting.

The mapping between Planon and Excel is as follows:

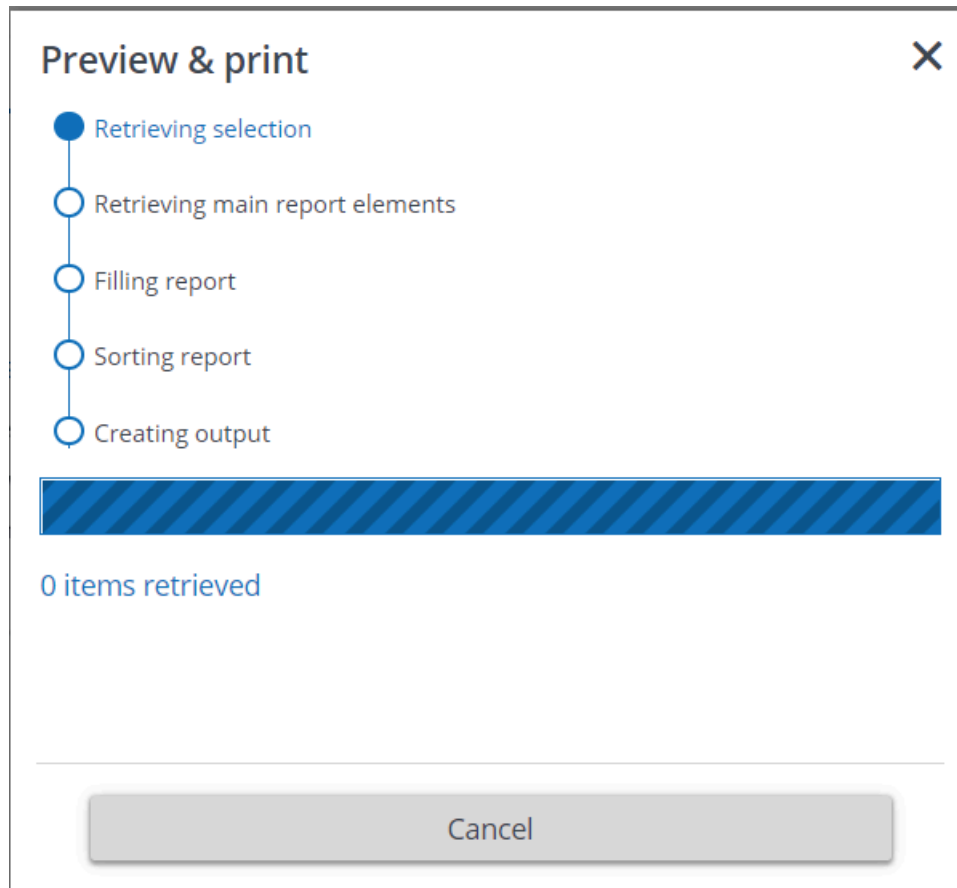
Planon field type	Excel cell format	Remark
Numbers	General	Not taking into account the Planon mask
Dates/date-time/time	Custom	Taking into account the Planon mask

**Note**• There is a difference in the way times are treated in Planon and Excel. Times are stored in numbers in Planon and the '0' is defined differently. This may cause unexpected results when comparing times in Planon and in Excel.

- Expressions, if the result is a number, date, date-time or time, will be formatted as specified above.
- Totals and group totals will be formatted as specified above.
- Group headers will not be formatted.
- Expressions, if the result is a number, date, date-time or time, without a Planon mask will be exported with the Planon java mask. This could differ from the Excel mask.
- Separators (date, decimal, thousand) are derived from the Excel user locale.

## Previewing & printing reports

For user reports, when selecting the **Preview & Print** option, a dialog box indicating a step by step progress of report generation is displayed. The generation process also displays the number of elements being retrieved and filled. You can cancel the preview of a report while it is in progress by clicking **Cancel** or by just closing the dialog box.



### Warning

When a report contains more than 500 records, generating it may take a long time. When this happens, a warning message will be displayed notifying the user about this possible performance issue.

## Report settings

The following table lists the fields available for report settings.

Field	Description
Name	This option enables you to enter a name for the report.
Subtitle	If you would like to add a subtitle to your report, you can specify one in this field. The subtitle will be placed immediately below the report's main title.
Comment	Here you can add notes on the report's functionality.
<b>Print options</b>	
Print only selected element(s)	Using this option, you can narrow down the number of elements to be printed. Only elements that have been specifically selected from the list will be printed in the report.
Print user name	This option enables you to have your login name printed in the footer of the report.
Print drill-down route	If you enable this option, the drill-down route displayed at the top of the elements list on your screen will also be printed in the header of your report.
Print titles and drill-down route on each page	By enabling this option, you have the report title and drill-down route printed on each page of the report.
Preview all documents as one file	The preview will be shown in one file for Word mail merge reports.




## Archiving element(s)

In Planon Web Client, it is possible to transfer some elements, such as orders or visitors, using the **Transfer to archive** button. If you archive elements, the elements are no longer shown on the elements panel.

Once archived, the data of these elements cannot be modified.

**Note** If you need to modify an archived element, you must first retrieve it from the archive. It is, however, also possible to modify archived elements directly. For the required settings, contact your application manager.

If you want to archive multiple elements at the same time, use the [Action on selection](#) option.

To display the archived elements in the elements panel, click the toggle button  or the **Show archived items** button.



## History

Planon ProCenter enables you to keep track of changes made to fields by enabling the **History** functionality. This includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. Your application manager can enable an automatic **History** option for individual fields in Field definer. For more information, see [Configuring the history feature](#).

**Note** Any modification to the field's value will be saved automatically in a log file. The results of any field changes can be viewed on the **History** selection step of the relevant TSI.

With the appropriate authorization, you can also manually add a history of changes to the selected field, via the action panel. Any comments you want to make on changed data can be specified in the **Comment** field and subsequently saved. To enable history manually, see [Adding history manually](#).

Following GDPR legislation, any personal data stored even in history records must be anonymized. To anonymize history in Planon ProCenter , see [Anonymizing history](#).

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Viewing history logs  
Adding history manually

---

## Viewing history logs

If automatic history has been enabled, any modification to a field's value will be saved automatically in a log file. The results of any field changes can be viewed on the **History** selection step. The following case shows how history is used in the Personnel TSI.

### Case

Employee Daniel Hobbs has a full-time contract but is now going to work part-time. You must adjust this in the Personnel TSI.

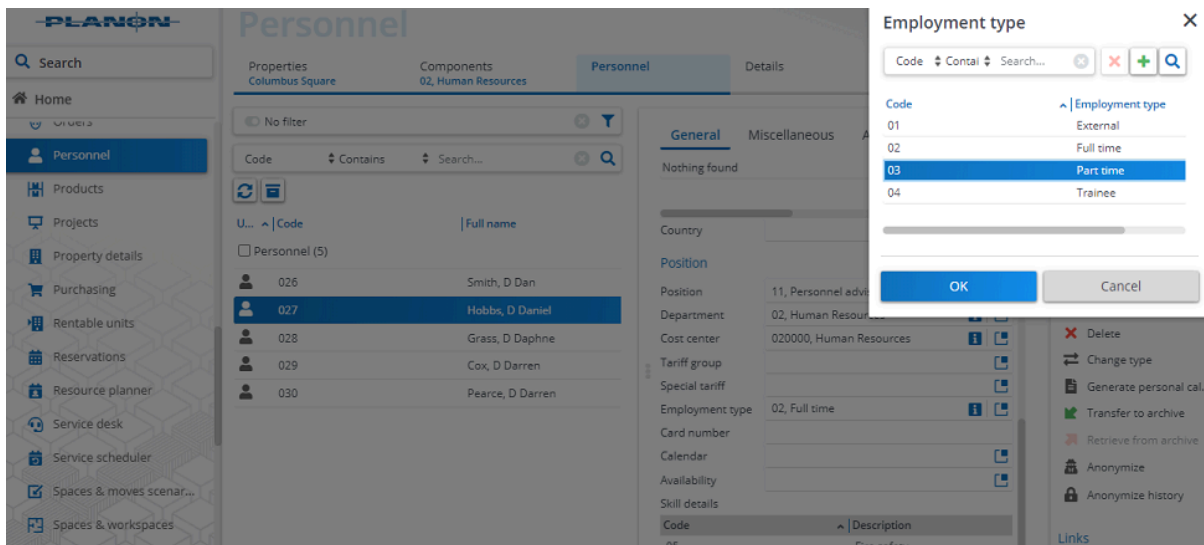
### Procedure

1. Select Daniel Hobbs.
2. Select the Employment type field. For this field, automatic history has been enabled.

### Note

To enable automatic history for individual fields, see [Field definer](#) .

3. Change the value in the Employment type field from Full time to Part time.



4. Click Save.
5. Go to the History selection step to see the history of changes.

**PLANON**

Personnel

Properties: Columbus Square | Components: 02, Human Resources | Personnel: 027, Hobbs, D Daniel | Details | Keys and key sets

Visitors | Archived visitors | Linked skills | Work assignments | **Personnel history** | Personal certificates

No filter

Modification date: Search...

Personnel history (2)

Modification date	User field name	Old value	New value
11/23/2021	Modification date-time	2021-11-23	
11/23/2021	Employment type	02, Full time	03, Part time

**General**

Person: 027, Hobbs, D Daniel

Field: Employment type

User field name: Employment type

Database field name: SYSCODETYPE

Old value: 02, Full time

1987 characters remaining (2000 maximum)

New value: 03, Part time

## **Adding history manually**

With the appropriate authorization, it is also possible to manually add history by entering a comment.

### **Procedure**


1. Select the field to which you want to manually add a comment.
2. Select the History selection step on the selection level.
3. In the action panel, click Add.
4. Enter a comment in the Comment field.
5. Click Save.

You have manually added history.

## Field types

Planon ProCenter supports different field types. For an overview of field types refer to the table below:


Field type	Description
Text field	Enter free text. The length of the text field is limited.
Comment field	A comment field is used to enter comments of any length.
Reference / pick list field	<p>Select an option from a predefined pick list. Instead of selecting a value from a pick list directly, you can select a value from a pick list through auto suggestions. The auto-complete feature allows you to enter partial text and displays matching results. You can then select the correct value from the suggested list. A maximum of (first) 10 items are displayed. Select one of the options from the results displayed. If you want to hide the list, press the ESC key on your keyboard, the cursor moves back to the end of the entered text.</p> <p>Each element in a pick list is linked to a code and description.</p> <p>In pick lists containing codes, however, you must enter a code. Do not use a description in these fields.</p> <p>It is possible to use search options in pick lists. You can search by the code and/or the element's description.</p> <p>When performing a search request, it is necessary to select one of the available operators. For more information on the available operators refer to <a href="#">Search operators</a>.</p> <p>In some pick lists, it is possible to use predefined filters. Use the radio buttons to select the appropriate filter option.</p> <p>In a multiple pick list, multiple options can be selected at the same time. An example of a multiple pick list is the <b>Person type</b> list. A person can have several roles (= <b>person types</b>) in Planon ProCenter, so it is possible to select more than one person type.</p>
Numerical field	Enter numerical data.
Date field	<p>Enter a date from a date picker.</p> <p>The following date formats are supported:</p> <ul style="list-style-type: none"><li>• <b>For English users:</b> mmddyyyy / mmddy / mmdd</li><li>• <b>For non-English users:</b> ddmmyyyy / ddmmy / dmmm</li></ul> <p>If you do not enter the year, the current year is added to the date. You can also enter the date in numeric format in the <b>Date-time</b> field.</p> <p>The date is converted to the appropriate format automatically based on the regional settings of the user.</p> <div style="border: 1px solid black; padding: 5px;"><p><b>Note</b> You can also press CTRL+D to insert the current date.</p></div>

Field type	Description
Time field	Allows you to enter the time using the built-in date picker. Time can be specified in hours, minutes and seconds.
Date-time field	<p>Allows you to use the built-in picker to select a date and time.</p> <p>You can also enter the date and time in numeric format. For example, 10182012 14:40. For more details on entering a date in numeric format, see <a href="#">Date field</a>.</p> <p>If you enter only the date, and not the time, and then tab out of the field, the time is displayed as 00:00. However, if you specify a default time, the time is calculated automatically and added.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p><b>Note</b> You can also press CTRL+D to insert the current date and time.</p> </div>
Multiple time zone field - property	If the multiple time zone functionality has been activated, data in date-time fields that is directly related to a property, will be derived from the property's time zone.
Multiple time zone field - user	If the multiple time zone functionality has been activated, data in date-time fields that is directly related to a user account, will be derived from the user's time zone.
Period field	A period can be specified in minutes, hours, days, weeks, months or years. A period field is often used in conjunction with date fields.
Link field	<p>By means of a link field, a file that has not been created in Planon ProCenter may be linked, for example an AutoCAD drawing or a Microsoft Excel document. You can view this file by clicking the  button.</p> <p>In Web Client, when WebDAV is used, the WebDAV location will not be displayed, only the folder excluding the folder specified in file location and file name will be displayed.</p>
File upload field	<p>Using a file upload field, a file can first be retrieved from a source location and then sent to a target location (specified in System Settings &gt; File locations).</p> <p>Only the file path relative to the WebDAV location is displayed and not the full WebDAV location.</p> <p>See also <a href="#">Uploading a file</a>.</p>
Life cycle aware fields	<p>The fields which can have multiple life cycles are called life cycle aware fields. For example, Contract, Contract line and Rentable unit. The value displayed in the field depends on the reference date.</p> <p>When the reference date is turned off, the icons are highlighted in red color and a tooltip is displayed to warn the user.</p>
Document (secure)	In the <b>Document (secure)</b> field authorized users can view a document that is stored at a secure file location, without accessing the actual secure file location itself.

## Field type

### Description

Users with **Read/Write** rights for this field can even upload documents to this secure location. The maximum file size is 20 MB.

With **Read** rights users can view the document by clicking the  button. With **Read/Write** rights users can view the document and edit it in a temporary directory on their local machine. The edited document can then be uploaded back to the secure location via the folder button.

Only the file path relative to the WebDAV location is displayed and not the full WebDAV location.

#### Application behavior:

- When you upload a document with the same name (again), it will overwrite the existing document and will prompt a warning message asking to confirm the action.
- When you upload a new document (with a different name), it will overwrite the existing document on disk.
- When you delete a document, it will not only be deleted from the record, but also from disk.
- When you copy a record containing a secure document, also the document on disk will be copied.

## Money field

Allows you to enter monetary amounts. Planon Web Client automatically adds the currency symbol and the required commas or decimal points.

### Warning

Money fields accept and display values as per the defined number of decimal places.

## Internet address field

Allows you to enter an Internet address in this field.

## Image

This 'link field' allows you to link or redact a file that has not been created in *Planon ProCenter*, for example a drawing or photograph. You can clear, rotate, upload, or download the original image,

or select an image file using the      buttons

respectively. Click the  download icon to download the *original* image file. Planon supports the following image types: .jpg, .jpeg, .png, .gif, .tiff, .svg, .bmp, and .ico.

To reduce overhead and improve scalability for viewing and downloading images, images are scaled while uploading. The original uploaded image is stored in WebDAV file location of Planon.

For the extensions .jpg, .jpeg, .png and .gif, the uploaded image is displayed as a thumbnail and if you click on the image, it is displayed in its full size. When you click another image file type, the file is downloaded for security reasons.



## Field type

## Description

To download an image, place the cursor on the image > right-click > **Save image as** > specify **Path** and **File name** > click **Save**.

**Note** The displayed or downloaded image is a scaled image, not the original image you uploaded.



Indicates that no image is selected.



Indicates that the uploaded image is a document.



Indicates that the selected image no longer exists.

## Self-Service – an Introduction

Planon Self-Service (PSS) allows users to complete simple tasks more easily. These tasks can be started from the gadgets on their homepage. PSS can also be integrated into your intranet as a stand-alone product.

PSS is a collection of several web definitions that are linked to a site. A web definition is a web form through which functionality is made available for users. **Service Requests, Knowledge Base, Visitors, Reservations** are some of the PSS web definitions that are available as web forms.

The forms displayed on your site depend on how your company chooses to configure them for you. You can use the PSS features either through the Planon application interface or publish (integrate) all Self-Service web definitions via a self-designed intranet page of your organization.

For more information about the Planon application interface, refer to [Planon application - an Overview](#).

What you see on your Self-Service screen is configured for you.

For example, if you are working for an educational organization, there may be different sites configured for the staff and students. A link on the intranet page takes you to the Self-Service screen that you want to use.

**Note** Contact your application manager for more information about customizing your PSS configuration.

## Self-Service - Standard features

Planon Self-Service (PSS) web forms have a common structure. The print screens and information displayed in this document are an example of what a form could look like. Contact your application manager for customizing the forms.

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Self-Service form  
Searching in Self-Service


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## Self-Service form

A Self-Service form is a web page that combines various blocks. A block is a section in a page.

The following table describes the generic pages and blocks available in PSS:

Page	Description
<b>Add page</b>	<p>Allows you to add an element which then becomes available in the list page. For example, if you add a visitor using the <b>Visitor add page</b>, the visitor is listed in the <b>Visitor list page</b> and becomes available for the back office.</p> <p>An add page has an add block where you fill in the information to create a new element. The fields with an asterisk are mandatory.</p> <p>For example, you fill in the visitor data on the add block of the Visitor page.</p> <p><b>Tip</b> For a description of the field types and the corresponding icons used, refer to Basic navigation in <i>Planon Web Client</i>.</p>
<b>Edit page</b>	<p>Allows you to edit the element details. For example, edit a visitor's details.</p> <p>An edit page has an edit block where you can make modifications/edits and submit the changes.</p> <p>There are, however, some differences in the way the edit page works across the modules:</p> <p><b>Tip</b> For more information, refer to <i>Self-Service Modules</i>.</p>
<b>List page</b>	<p>The List page consists of:</p> <ul style="list-style-type: none"><li>- An <b>information block/help text</b> on the top of the page. The information block displays additional information or instructions specified for the page.</li><li>- A <b>search block</b> that allows you to search for a specific element. Specify the search criteria in the search fields.</li><li>- A <b>list block</b> that displays the available elements on the page.</li></ul> <p>The list block displays search results in the form of rows. Clicking a row will display the details of the selected element in a detail block.</p>

Page	Description
	<p>If the number of results exceeds the number specified in the settings, navigation buttons are enabled.</p> <p>The Navigation buttons</p>  <p>display a count of the number of pages on the web form. The display of the page numbers is configurable by your application manager.</p>
<b>Confirmation page</b>	Consists of a <b>confirmation block</b> . It displays the default text to confirm the action that you performed. For example, a confirmation is displayed when a new visitor is added.
<b>Details page</b>	Consists of a <b>details block</b> . It displays complete details of an element.

In PSS, there are some blocks that are available only with specific pages. The following table describes these specific blocks:

Page	Description
<b>Order lines block</b>	This block is available only in the Work orders page.
<b>Upload block</b>	The upload block is available in the Add/edit pages of <b>Service requests, Orders, Move request, Workflow</b> and <b>Reservations</b>
<b>Communication logs block</b>	This block is available in <b>Service calls &gt; Details</b> page.
<b>Question block</b>	This block is available in <b>Service calls</b> and <b>Workflow</b> .

## Searching in Self-Service

In Self-Service, end users can search for information in various ways. The configuration of search actions is done in **Web Configuration** .

- **Auto-suggest:** enables users to find and select a value by providing a list of possible results based on matching characters typed by the user.

### Warning

You cannot search if a mandatory field is left empty.

- **Pop-up and auto-suggest:** enables users to search either by selecting an entry from a pop-up or selecting a suggestion from the auto-suggest directly.
- **Drop-down:** Users can select the search criteria from a drop-down list.
- **Free text field:** Users can type search criteria in a free text field.

### Note

If the setting **Split search string** is set to **Yes** in a **Search** block, users can enter search criteria that include multiple search terms in random order. For more information on the field, see [Web Configurations > Search block](#).

### Warning


Important: click the **Search** button again to see the search results when you change the search criteria.

# Shortcut keys

Planon ProCenter supports keyboard shortcut keys to perform certain actions in the application.



- Shortcut keys are not supported on tablets or mobile phones.
- Pressing the ? on your keyboard (SHIFT+?) will display a dialog box containing (some

of) the most important shortcuts. You can also display this dialog box by clicking  > **Keyboard shortcuts**.

The following lists display the most important keyboard shortcut keys that can be used in the Planon application.

## General

Press key(s)...	To...
CTRL+F4	Quit the current browser tab.
ALT+F4	Quit the browser.
TAB	Navigate to the next screen element.
SHIFT+TAB	Navigate to the previous screen element.
CTRL+F5	Refresh your browser.
ALT+F1	Open the configured Planon WebHelp. <b>Note:</b> An error is displayed if no webhelp is configured.
? (SHIFT+)	Display a list of keyboard shortcuts in Planon.
ALT+L	Open/close navigation panel
ALT+S	Activate searching in the navigation panel; puts cursor inside the search box.
CTRL+S	Save the record.
ALT+SHIFT+L	Open the <b>Skip links</b> menu.

## Zoom in/out

Press key(s)...	To...
CTRL+	Zoom in (maximum font size 24 pt)

<b>Press key(s)...</b>	<b>To...</b>
CTRL-	Zoom out (minimum font size 6 pt)
CTRL 0	Reset font size
CTRL+scroll	Zoom in or out



In Windows 10, the default zoom for the Google Chrome browser is set to 125%. Hence, elements in Planon may look larger in Chrome when compared to other browsers.

### **Data panel**

<b>Press key(s)...</b>	<b>To...</b>
CTRL+D	Enter the current date-time in date-time fields (and also the user name in memo fields)  Enter the current date (date fields only)  Enter the current time (time fields only)
CTRL+C	Copy selected text
CTRL+V	Paste selected text
CTRL+X	Cut selected text
DELETE	Delete selected text
CTRL+Z	Undo (only changes in the active field)
HOME	Go to the beginning of the line
END	Go to the end of the line
CTRL+A	Select the field value (text) if cursor is placed in it.  Select entire text in the page when cursor is not placed in a field
CTRL+HOME	Move the cursor to the beginning of the field (memo fields only)
CTRL+END	Move cursor to the end of the field (memo fields only)
Holding SHIFT +cursor movement (ARROW, HOME or END keys)	Select or extend the selection of text





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<b>Press key(s)...</b>	<b>To...</b>
Holding SHIFT +CTRL+cursor movement	Select or extend the selection of text by word or text block
CTRL+LEFT/ RIGHT ARROW	Move cursor to the beginning of the previous or next word
LEFT/RIGHT ARROW	Move cursor within a field (only when field has focus)
UP/DOWN ARROW	Move up and down through editable fields
TAB	Move forward through fields and field buttons. Focus on info or pop-up buttons.  Set a tab in a memo field
SHIFT+TAB	Move backward between fields and field buttons
CTRL+TAB	Go to the next browser tab
ENTER	Enter a new line in a memo field. Select the focused element.
HOME	Jump to the beginning of a row
END	Jump to the end of a row
Arrow keys	Navigate through the element list / tree
Any alphabet key	Jump to the first element in the list / tree starting with that key (alphanumerical). Pressing the key multiple times loops through all the elements starting with that key.  On a non-paginated list / tree, it goes through all the opened nodes.  On a paginated list / tree it only goes through the opened nodes of the current page.
SHIFT+HOME	Select the root node of a list or tree (grid and proxy panel)
F5	Refresh the elements list

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### **Actions**

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<b>Press key(s)...</b>	<b>To...</b>
ESC	Cancel changes
CTRL+S	Save changes
CTRL+space	Find an element by its number or code.
<div style="border: 1px solid red; padding: 5px;">  The shortcut will only work if there is a <b>Find</b> icon () at the top right corner of the header.         </div>	
<p>The shortcut is included in the following TSIs:</p>	
<ul style="list-style-type: none"> <li>• Work Orders</li> <li>• Assets</li> <li>• Personnel</li> <li>• Contracts</li> <li>• Invoices</li> <li>• Moves</li> <li>• Projects</li> </ul>	
RIGHT ARROW	Open the action drop-down list if there is more than one action
UP/DOWN ARROW	Navigate through action items

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# Index

## A

- Accessibility 22
- Action on selection 44
- Action on selection: warning message 44
- Action panel on a tablet 35
- Active element 39
- Add page 108
- Adding history manually 101
- Archived items: hide 97
- Archived items: show 97

## B

- Basic navigation on a tablet 31, 33

## C

- change password 18
- codegen 83
- Comment field 102
- Communication logs 88
- Configuring gadgets 27
- Confirmation page 108

## D

- Data panel on a tablet 34
- Data section 50
- Date field 102
- Date-time field 102
- Details page 108
- Digit inclusion 10
- drag-and-drop 53

## E

- Edit page 108
- Elements 39
- Elements: archive 97
- Elements: hierarchy 41
- Elements:change type 57
- Elements:copy 55
- Elements:delete 56
- Exporting data to XLS(X) 94

## F

- Field definer 98
- Field types 102

- File location
  - secure 102
- File upload field 102
- Filter and search bar 60
- Filter macros 78
- Filter: types 62
- Filter:add 74
- Filter:copy 85
- Filter:delete 87
- Filter:edit 84
- Footer bar 43

## G

- gadget library 27
- Gadgets 25, 26
- GDPR 16
- Grouping filters 77

## H

- Header 12
- Help 16
- History 98
- Homepage 12, 25

## I

- Image field 102
- initial status 58
- Internet address field 102

## K

- Keyboard shortcuts 16

## L

- Landmarks 24
- Link field 102
- List page 108
- Log of changes 98
- Log on 8
- Logging in
  - Planon Web Client 8
- Logging out 11

## M

- macros
  - primary arguments 80
  - secondary arguments 80
- Maximum alphanumeric sequence 10
- Maximum repeating characters 10

- Minimum length 10
- Modify within Selection 47
- Money field 102
- Multiple time zone
  - field type 102
- My account
  - change account settings
  - change password 18

## N

- Navigation panel
  - Pin / Unpin 20
  - Search 20
- Navigation Panel 12
- New password 10
- Numerical field 102

## P

- Panel resizing 52
- Period field 102
- Planon application for tablet users
  - Android 28
  - iOS 28
- Planon Self-Service 106, 107
- Previewing & printing reports 95
  - primary arguments
    - macros 83
- Privacy statement 16
- Property file field 102

## R

- Reference date 14
- Reference field / pick list field
  - description or code 102
  - filter options 102
  - search options 102
- Relative filter 79
- Relative selections 78
- Report:generate 90
- Ribbon 14

## S

- Save as options 92
- Saving reports 91
- search operators 65
- Search operators 61, 63
- Searching in Self-Service 110

- Secure document 102
- Secure document field 102
- Select all 49
- Selection bar 38
- Selection level 38
- Selection step 38
- Selections: via filters 70
- Selections: via search bar 60
- Self-Service form 108
- shortcut keys 37
- Shortcut keys
  - Actions 111
  - Data panel 111
  - General 111
  - Zoom in/out 111
- Skip links menu 24
- Start 8
- Symbol inclusion 10

## T

- Text field 102
- Time field 102
- TSI help 16

## U

- uploading a file 53
- Uppercase and Lowercase 10
- user account details 14
- Using AND OR filter 76

## V

- view status flow of an element 58
- Viewing history logs 99

## W

- WCAG 22
- Web Client for tablet users 29
- Web Client menu 30
- WebHelp 16
- Workspace 12

## Symbols

- &codegen 83
- &USERNAME 83