Layouts

Planon Software Suite

Version: L105

Planon

Building Connections

About this Document

Intended Audience

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

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

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

Table of Contents

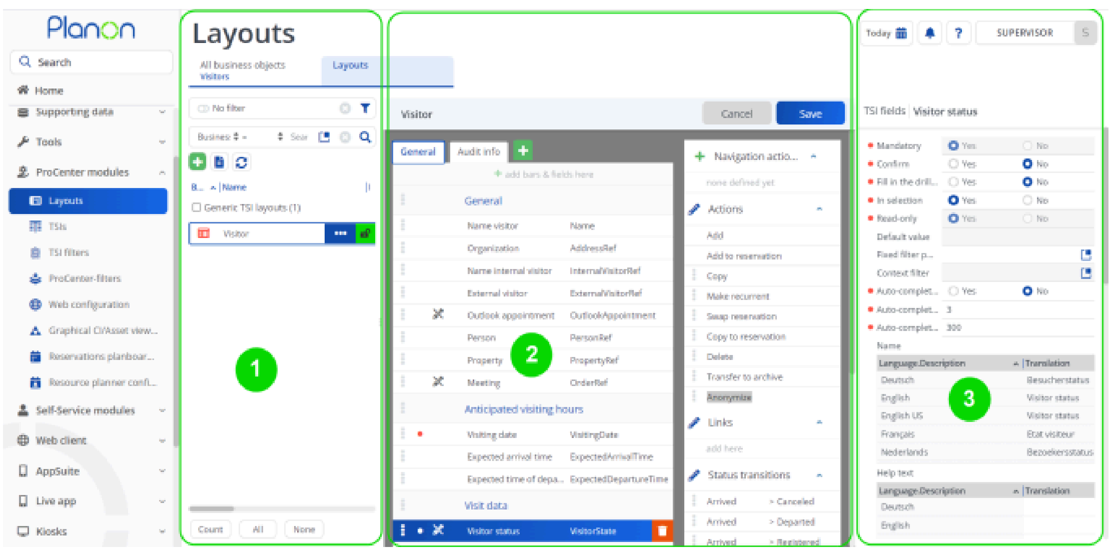
Layouts

In Layouts , you can determine the way that your business objects appear on the screen.

The Planon software is highly configurable and features free definable functionality and free fields to extend functionality and cater to the needs of the customer.
Please note that the Planon software is **not** meant to capture and store sensitive personal data. In addition, free definable fields are **not** meant to capture and store personal sensitive data (as defined within the context of privacy and data protection laws).

In Layouts , you can add or delete fields, tabs, bars, actions, links, status transitions, change the order of these elements on the screen and in some cases provide a name or translation(s).

You can perform these actions in the following Layouts panels:



1	**Elements panel**, Displays the layouts that are available for the business object that is selected on the **All business objects** level.
2	**Layout panel**. Displays a mock-up of the layout and actions as they will appear on the screen.
3	**Details panel**. Displays details of the elements that can be configured on the **Layout panel**.

Before configuring the layout, remember to set the business object **Under construction** by clicking the padlock icon to the right.

Layout panel

To add items to the **Layout panel**, simply drag-and-drop the required item from the **Details panel**. The grid background underscores that this area is meant for constructing the layout.

> Before configuring the layout, remember to set the business object **Under construction**.

The **Layout panel** consists of two sections:

1. For adding or deleting:
   - Fields
   - Bars
   - Tabs
2. For adding or deleting:
   - Navigation actions
   - Actions/Extended actions
   - Links
   - Status transitions

Here, you can also enable/disable the **Show flow diagram** action.

You can also disable the **Save**/**Cancel**, which renders the layout read-only.

- The **Details panel** displays the available items based on the area you select in the **Layout panel**.
- To delete an item from the layout, select it and click the **Recycle bin** that appears.
- Using multiselect is not supported.

For a selected field, you can also set field attributes. For more information on this, see Field attributes.

Changing a layout

1. Select the business object whose layout you want to change.
   - The details of the selected business object appear in the **Details panel**.
   - In the **Details panel**, you can:
     - Set the business object to Read-only, which removes the **Save**/**Cancel** buttons.
     - See in which TSI the selected layout is used.
2. Click the area in the layout where you want to add a component.

   The Details panel will display the available components.
3. Select the required component from the Details panel and drag it into the right position on the Layout panel.

Continue adding/deleting items until you are done.

4. Click Save on top of the Layout panel to save your changes.
5. Set the business object to Completed.

Adding multiple items

For ease of use you can CTRL+select or SHIFT+select multiple items and drag them in one go.

1. Select the business object whose layout you want to adjust and set it Under construction.
2. Click the appropriate area in the Layout panel once to show the items (fields, actions,…) that are available.
3. CTRL+select or SHIFT+select the items and move them to the right position.

When you drag the items, a number indicating the number of items being moved is shown.

4. When you are done, click Save and set the business object to Completed.

Adding tabs

If your screen contains too many fields, you can chose to create a new tab and distribute the fields across them.

1. Click the + icon that appears near the current tabs.

   A new tab appears, its default name is Not translated.

2. Click Save on top of the Layout panel.

   In the Details panel you can now provide a name for the tab.

3. Add the required bars and fields and when you are done, set the business object to Completed.

You can delete a tab by selecting it and clicking the **Recycle bin**. There has to be at least one tab.

Adding navigation actions

In Planon you can specify navigation actions, which are links from one TSI's selection step to another. This can be a selection step within the same TSI or a selection step belonging to another TSI.

1. Click the + icon that appears in front of Navigation actions. In the menu that appears you can choose to Add or Copy from navigation actions.

   ◦ When clicking **Add**:

1. Click **Yes** when prompted to save you changes.

   The **Navigation action wizard** appears.

2. Complete the steps in the wizard.
3. Provide a name and - optionally, a translation - for the navigation action and click **Save** on top of the **Layout panel**.

   ◦ When clicking **Copy from**:

1. In the dialog box that appears, select the step and business object to which you are creating a navigation action.
2. Click **OK** to complete the procedure.

- To delete a navigation action, select it and click the **Recycle bin**.

- To modify a navigation action, select it and click **Edit**.

Creating a fixed filter

As a system administrator, you can use **Fixed filters** to fix or limit the data viewed by the end user. Fixed filters can be applied to dialogs of reference fields. When applied, the end user (using the dialog) will be unaware of the filter.

Procedure

1. Go to Layouts and select a layout on which you want to apply fixed filter and set it to Under construction.
2. On the layout panel, select a field to which you want to apply the fixed filter.

> A fixed filter can be used for the same reference field type on multiple layouts. Fixed filters can also be created in *TSI Filters*. For more information, see *TSIs*.

3. On the TSI fields panel, select Fixed filter field and open the pop-up. For information on the field, see Field attributes.
4. In the dialog box, click Add.
5. Enter a name for the fixed filter and select the filter criteria.
6. Click OK.
7. Click Save to save the filter.

You can create multiple filters with various criteria. However, you can only apply one filter at a time.

8. Click OK again to apply the created filter.

If you would close the window directly, before clicking OK, the filter will not be applied.

Context filters

The purpose of a context filter is to limit the display of elements in a dialog box, based on a reference value selected as context.

With context filtering, you define a context field in the *Layouts* TSI and apply the context criteria for filtering. Depending on the value selected in the context field, the reference will be automatically filtered. Context filters can only be applied to reference fields, including free fields configured as reference fields.

> If you already have a user filter on the same field with different filter criteria, both filters will be applied. If the existing user filter has the same criteria, it will be overwritten by the context filter. It is possible to change the values applied via the context. However, on closing and reopening the dialog box, the context will be reapplied.

For the procedure to add a **Context filter**, see Creating a context filter. For information on the **Context filter** field, see Field attributes.

Creating a context filter

You can use **Context filters** to filter on a value from the same or referenced business objects. When applied, the end user (using the dialog) will see any context that is applied by using the 'quick search' fields. Also see Context filters.

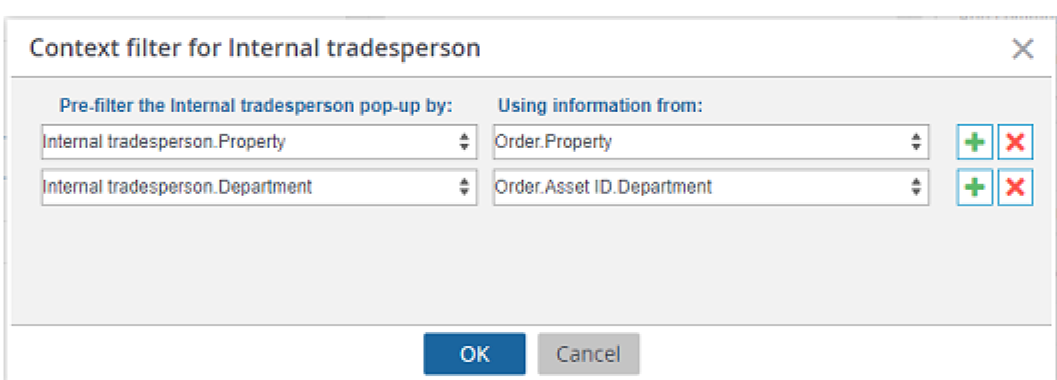
Procedure

1. Go to Layouts, select a layout to which you want to apply a context filter and set it to Under construction.
2. In the layout, select a field to which you want to apply the context filter.
3. In the TSI fields panel, select the Context filter field and open the pop-up. For information on this field, see Field attributes.
4. In the dialog box, select the relevant values:
    - From the drop-down on the left, select the reference field of the selected field from the current business object. Only the fields for which 'Simple selection' is enabled in **Field definer** are displayed.
    - From the drop-down on the right, select the reference field (of the same reference field type as on the left-hand side) to be used as context. The drop-down list will also include reference fields from relational business objects of the selected layout. Typically, these are the 'In use' fields of the business object.

The fields must be available on both business objects (corresponding mapping) and have 'Simple selection' enabled to be displayed in the drop-downs.

5. Click OK.

Example: For the **Orders** business object, you want to create a context filter on the **Internal tradesperson** field, with **Property** being the context. In **Layouts**, you select the **Internal tradesperson** field on your **Orders** layout and open the **Context filter** dialog box.



In left-hand drop-down, you select **Property** (since this is the field on **Personnel** you want to filter on). In the right-hand dialog box, you also select **Property** (since this is the field on **Orders** that you want to use as context). Additionally, you can also select any other reference field such as **Department** to filter on with reference fields from other relative business objects, such as **Department** in **Assets** to be used as context.

In the **Orders** TSI, select an order (for which the **Property** is filled in) and open the **Internal tradesperson** dialog box. Notice that a simple search is applied, with **Property** and **Department** as context. The list is pre-filtered, displaying only the internal tradespeople linked to the selected property and department of the order.

- Context filters work alongside user screen settings. If an applied context filter is modified by the user and re-applied, the changes to the filter are saved to the user settings. Next time the user opens the dialog, any previously saved user settings are applied, even though no context filter is applied.
- If the **Auto-complete** feature is activated on the field and the selected field also has a **Context filter** applied, this filter is automatically applied to the auto-complete results.

For more information on filters, see Searching and filtering (Fundamentals).

Activating auto-completion for fields

For some field types that are frequently used, it is useful to enable the auto-complete feature so that users only have to type a few characters to complete a field.

On the **Details** panel in **Layouts** you can activate the auto-complete function for reference fields of your choice.

Procedure

1. In All business objects, select the business object for which you want to set one or more fields to auto-complete.

Typical reference fields for which this feature might be convenient are:

- Property
- Department
- Space
- Asset ID
- Internal tradesperson
- etc.

2. Go to Layouts and set the relevant layout to Under construction.
3. Click the field for which you want to configure auto-completion settings.
4. On the Details panel set the field Auto-complete active? to **Yes**.
5. In the **Auto-complete - min. no. of characters** field, enter the number of characters after which the auto-completion function should show suggestions. For example *3*.
6. In the **Auto-complete - response delay (milliseconds)** enter the number of milliseconds after which the list of suggestions should be displayed. For example *300*.
7. Click Save and set the business object's status back to Completed.
8. Log off/on to implement your changes.

Adding a help text

The application manager can provide a tooltip to a field to provide extra information.

Procedure

1. In All business objects, select the business object for which you want to add a help text.
2. Go to Layouts and set the layout to Under construction.
3. Click the field for which you want to add a tooltip.
4. On the Details panel > Help text, provide a Help text (in multiple languages, if applicable).

A Help text could - for example - contain a short description, an instruction, or a reference.

5. Click Save and set the business object's status back to Completed.
6. Log off/on to view your changes.

   The name of the field in the Planon interface will now be underlined. When hovering over the field, the text will be displayed to the user (as a tooltip).

Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Field attributes

Field	Description
Mandatory	Determines if a field must be completed. Any relevant mandatory fields must be completed when adding a new

Field	Description
	element. This field can be disabled if it is made mandatory by the system or in **Field Definer**.
Confirm	Any modifications by the end user of the value in this field need to be confirmed if the **Confirm** attribute is selected.
Fill in the drill-down context	Determines if a field has to be completed based on the selections made by the end user at previous selection levels (this is only possible if the field is visible and not read-only).
In selection	If enabled, the field concerned will be available in the filter dialog box (end user can set a filter on this field). For hierarchical business objects, you should always enable the **In selection** attribute on the highest level. This attribute is not available to be set for user defined business objects.
Read-only	If enabled, the field can only be read and not changed by the end user. Note that Planon ProCenter can still change the field.
Default value	Specifies a default value for the field (not available for all fields).
Fixed filter	Create a fixed filter for the selected reference field. In the corresponding dialog box, end users will see data in the context of the referenced business object. They can turn off the filter. For more information on creating a fixed filter, see Creating a fixed filter.
Context filter	Create a context filter for the selected reference field. End users will only see pre-filtered data in the corresponding dialog. For more information on creating a context filter, see Creating a context filter.
Auto-complete active?	Select **Yes** to activate the auto-complete feature. This setting is only available for reference fields and is set to **No** by default.
Auto-complete - min no. of chars	Specify a value to determine the number of characters after which the system fetches the auto-complete list. '**3**' is set by default. You can also set this number to a minimum of two characters. If the number of characters for auto-complete is less than two characters, an error message is displayed.
Auto-complete - response delay (milliseconds)	Specify the time in milliseconds. This indicates the latency time when a text is typed in by the user and the call is made to the server to fetch the list. 300 milliseconds are specified by default.

Field	Description
	If the response initiation delay for any reference field is set to less than 300 microseconds, an error message is displayed.

Detail panel fields

On the Details panel, a number of settings are available that allow you to

Field	Description
Read-only	If this switch is green, the layout is read-only (the **Cancel & Save** buttons disappear from the Layout panel). To make the layout editable, simply click the switch again.
Name	Displays the name of the selected layout.
Default layout	Click **Yes** to make a layout the default layout. You can only define one layout as a default layout. Once a layout is defined as **Default layout**, the field will automatically be set to **No** for all other layouts in the business object.
For use in pop-up	Click **Yes** if you want to use the layout in a pop-up. Each business object has its own pop-up. If you are configuring a reference pop-up, make required settings for the **Max. no. of BOs shown** and **Show BOs initially** fields. These fields enable you to configure how business objects are displayed in a pop-up. For more information on pop-up "behavior", see Pop-up settings. If, you want to enforce that a layout is always used as the layout for pop-ups, you need to indicate this by setting the **Always use pop-up layout for info pop-ups** setting in General setting fields . By doing so, this layout will always be used for pop-ups for the corresponding business object.
Max. no. of BOs shown	Click to set a maximum value for the number of business objects to be shown.

Field	Description
Show BOs initially	Click to specify whether business objects are to be shown initially when opening a pop-up.

Pop-up settings

The settings you make in the Details panel, affect the "behavior" of pop-ups. Consider the following examples.

Field	Value	Description
Max. no. of BOs shown Show BOs initially	No Yes	Since a maximum value is not specified and business objects are shown initially, they are all displayed as soon as the pop-up opens.
Max. no. of BOs shown Show BOs initially	No value No	No business objects are displayed initially. Users must apply a search filter to display the results in the pop-up.
Max. no. of BOs shown Show BOs initially	100 Yes	A maximum of 100 business objects will be shown in the list. If the number of business objects exceeds 100, the surplus is not displayed.
Max. no. of BOs shown Show BOs initially	100 No	No business objects are displayed initially. To display results in the pop-up, users must apply filters until the number of business objects is reduced to less than 100.

Index