Planon Marketplace

Planon Software Suite

Version: L105

Planon
Building Connections

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About this Document

Intended Audience

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

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

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

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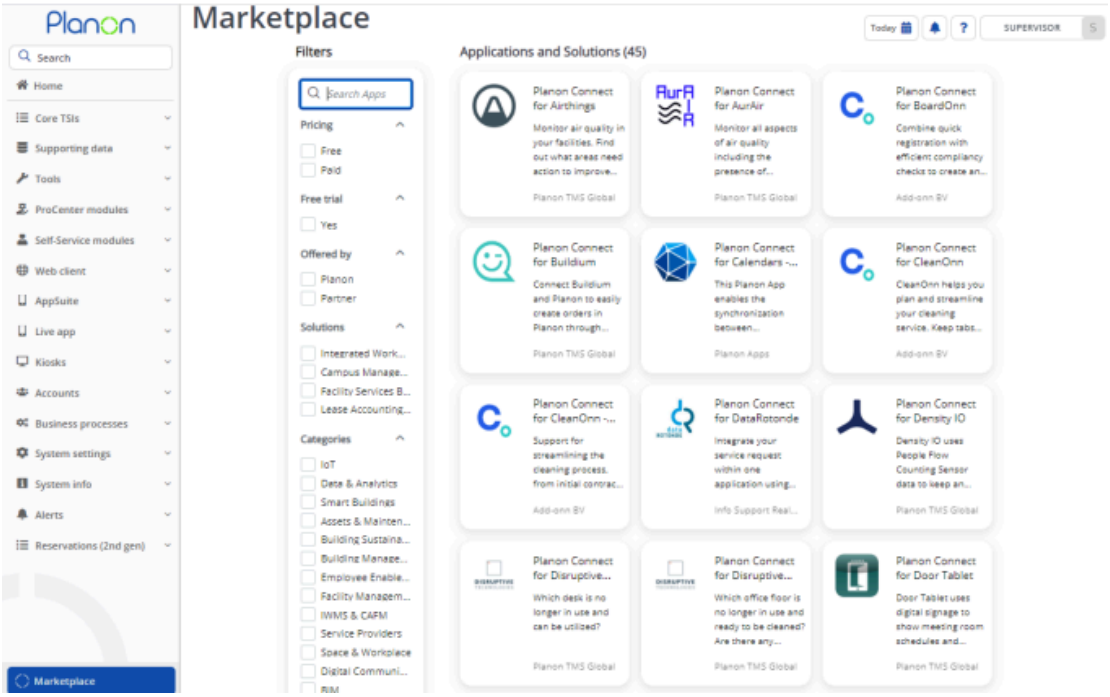
Planon Marketplace

The Marketplace is Planon's *one-stop shop* for all Platform apps that are available to customers.

Here, you can browse and review apps that will enable you to extend your Planon functionality.

Partners who have an own IDE can build and deploy apps to the Planon Marketplace. For more information, see Platform apps.

> The apps listed in the Planon Marketplace have been approved by Planon.



The content in the Planon Marketplace is updated dynamically. This means that whenever there is new content available, this is reflected in the Planon Marketplace for the benefit of customers.

You can add the Planon Marketplace to your navigation panel, or you can use the easy access functionality.

Adding the TSI and settings to your navigation panel

To be able to access the Planon Marketplace, you must add the TSI and settings to your navigation panel.

1. Go to Web client > Navigation panel.

You can make it generically available or just for a specific user group.

2. Go to Navigation panels, select a navigation group and click Add TSI
3. In the TSI field, browse for and select Marketplace and click OK.
4. Click Save to apply your changes.

   You have now added the Marketplace TSI to the navigation panel. Proceed to do the same for the Marketplace settings.

5. In Navigation panels, go to System settings and click Add TSI.
6. In the TSI field, filter for Name = Planon Marketplace settings, select it and click OK.
7. Click Save to apply your changes.

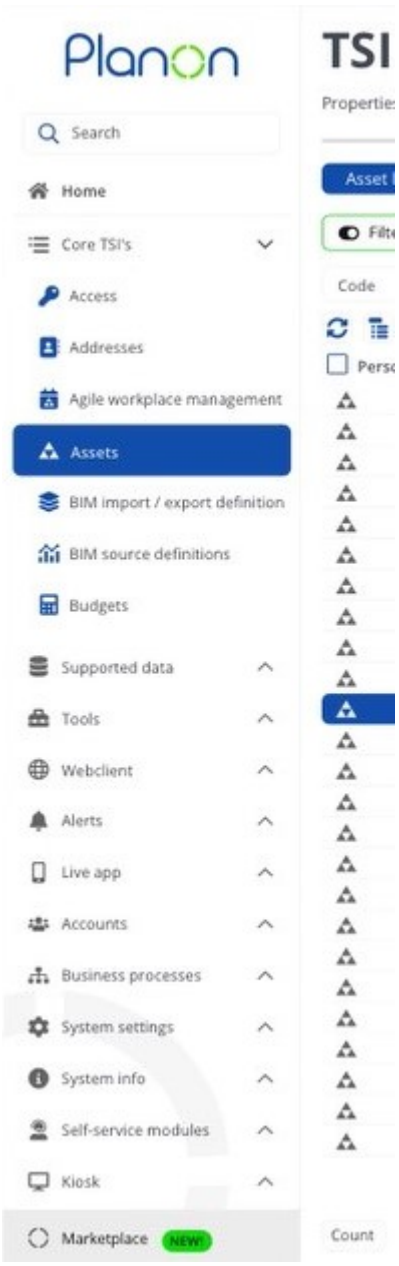
   You have completed adding the Planon Marketplace settings to System settings.

8. Log out / log on to the application and proceed to specify the Marketplace settings

Easy access

We want to make access to the Planon Marketplace as easy as possible.

That is why it will be available at the bottom of the navigation panel - for everyone to see!



Initially, there will be a striking 'New' button to draw attention to the entry. Once clicked, this button will disappear.

The easy access button will be visible for all users, unless:

- The Marketplace has been disabled (Marketplace settings).
- The Marketplace has not been registered.
- The Marketplace has only been made available to a specific user group (Marketplace settings).

Marketplace settings

To access the Planon Marketplace, its settings need to be configured. This is done automatically via the Planon license.

Accessing the Planon Marketplace is achieved by using an access key. Each partner or customer will receive a specific account and access key from Planon.

If you do not want to use the Marketplace, make sure to disable it (see Step 3)!

Procedure

1. Go to System settings > Planon Marketplace settings.

If the settings here are empty, you can request a license update from Planon:

- The new license will disclose and specify the Marketplace settings.
- The connection to the Marketplace is automatically created.
- A customer-specific access key is specified.

2. Subsequently, these settings will be reflected in:
   - the **URL** field, which will display the Planon Marketplace URL:
   - The access key that you have been given by Planon.

On-premise customers must ensure that server access to planonsoftware.store is not blocked by a firewall. If this is the case, please ask your IT department to resolve this. If the server cannot access the Planon Marketplace, apps cannot be downloaded or updated.

3. By default, the Planon Marketplace is enabled (Planon Marketplace enabled? field is Yes.)

   If you do not want this, click **Disable Planon Marketplace** in the action panel; the settings will be cleared and no connection with the Planon Marketplace will be made. When you do this, the **Planon Marketplace enabled?** field will be set to **No**.

   If you then would click **Enable Planon Marketplace** in the action panel again, your Planon license is checked for the Marketplace credentials. If these are found, the connection to the Marketplace is restored. When you do this, the **Planon Marketplace enabled?** field will be set to **Yes**.

4. In the Marketplace user group field, specify the user group to whom you want to make the Marketplace available.

If you do not specify a group, the Marketplace will be available to all users!

5. In the **Trial license user group** field, specify the user group whose users are allowed to request a free trial of an app.

If you do not specify a group, nobody will be able to request a free trial.

You can now open the Marketplace in your navigation panel.

Enabling scheduled task

A system task is available that ensures that the Marketplace checks for app updates. When using the Planon Marketplace, make sure that this system task is enabled.

Procedure

1. Go to System Settings > Scheduled tasks and in the elements list, find and select the task: SYS_APPS_CHECK_FOR_UPDATE.
2. Specify a schedule for the system task.

The interval should be at least 6 hours.

3. On the action panel, click Active.

You have now ensured that the latest app updates will be reflected in the Planon Marketplace.

Working with the Planon Marketplace

This section describes how to use the Planon Marketplace.

Marketplace overview

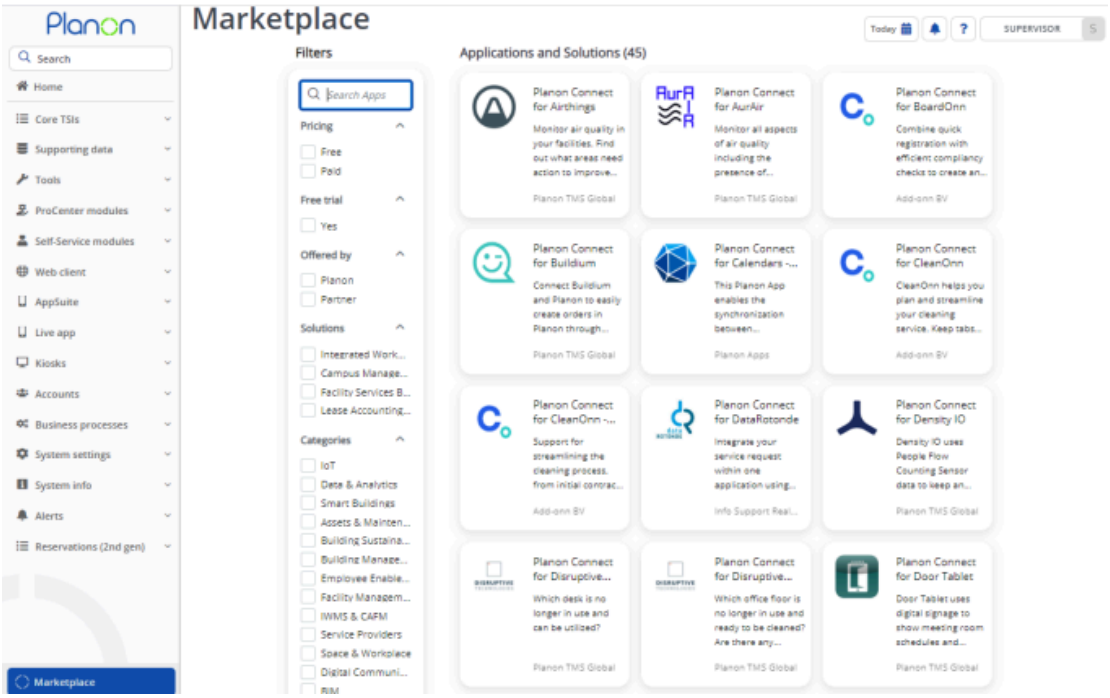
If you want to check out the available Platform apps in the Planon Marketplace, proceed as follows.

In your navigation panel, click **Marketplace** to open it in the application.

You will see a number of tiles representing apps and displaying some app details such as:

- The app name
- A short description of the functionality
- An indication whether the app is free or paid

The content of the Marketplace is updated as soon as a new version is made available - irrespective of your Planon version.



App details

To view more information about an app, proceed as follows.

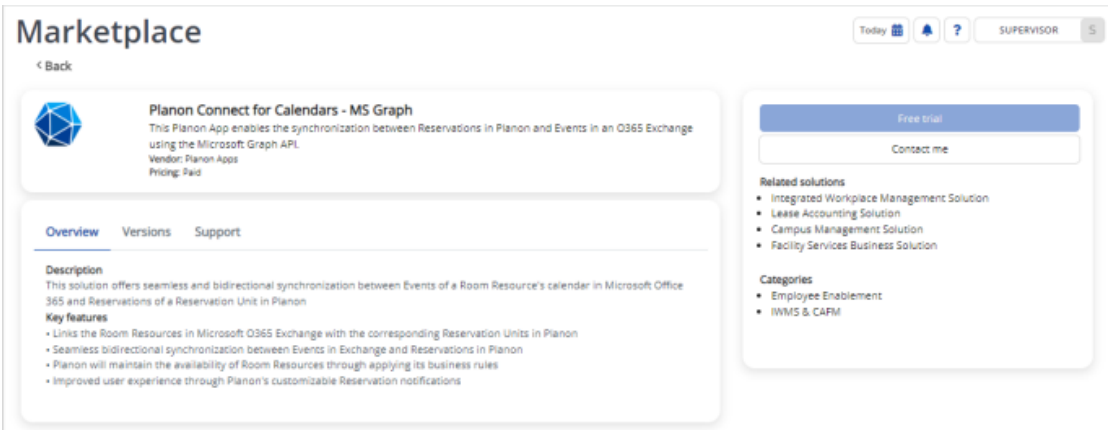
Click on any of the app tiles to see more details about the app.

A details page with various tabs opens.

Overview tab

The Overview tab contains the following information about the selected app:

- An extensive description
- App impressions (click to display and browse through the images)
- Brochure (download)
- Key features
- Related solutions
- Categories



Versions tab

Provides an overview and description of the various app versions that are available and the Planon versions for which they have been verified.

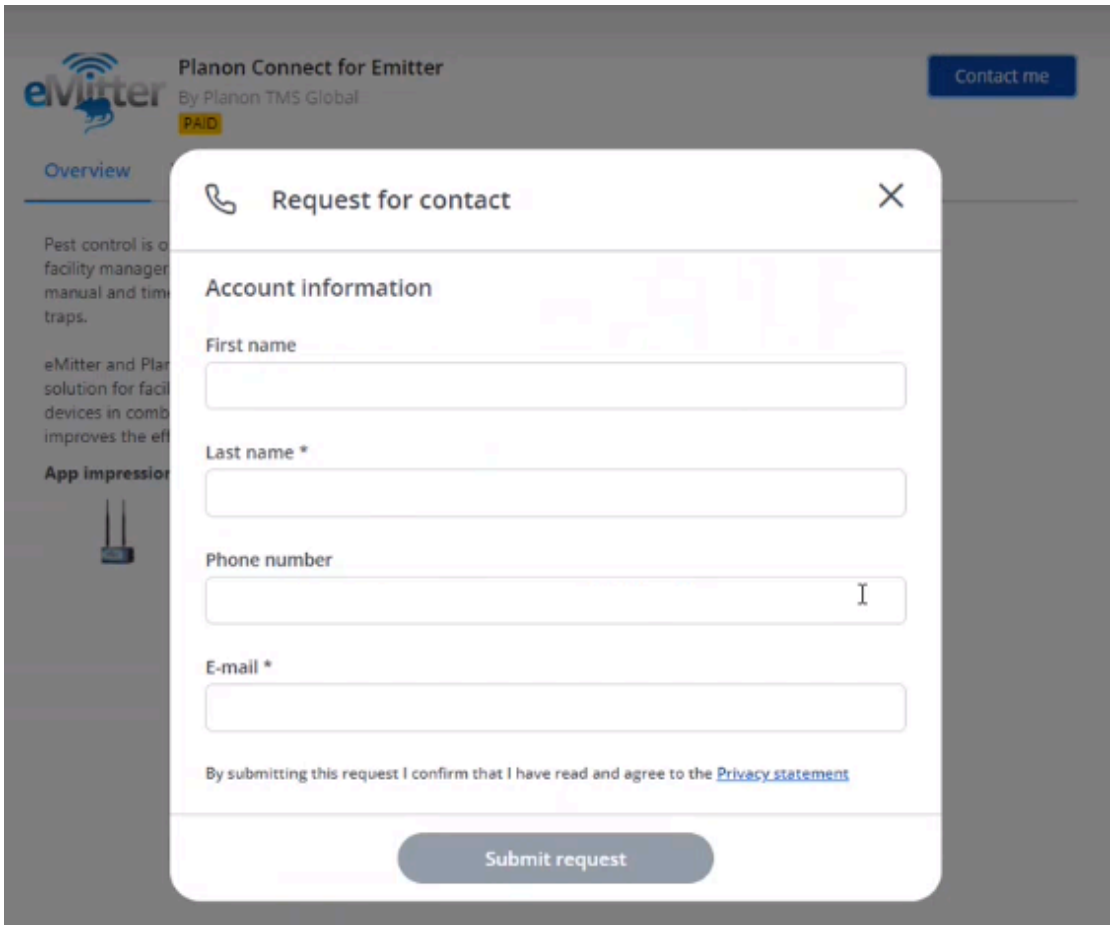
Support tab

Here you can download the app's documentation and get in touch with Planon.

Click **Back** in the ribbon to return to the Marketplace main page.

Contact me

Customers who are interested in learning more about a specific app in the Marketplace, can simply click the **Contact me** button, fill in a form and submit a contact request.



The request will be submitted and will be followed up as soon as possible.

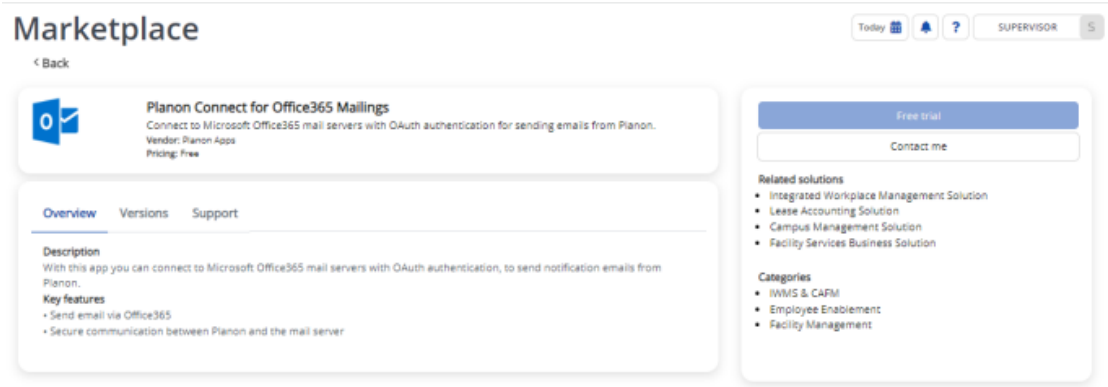
Once users have submitted a request, their credentials will be auto-populated when submitting a new request based on the information from the linked account (Personnel).

Any new information submitted via the form will be subsequently be used for auto-populating the request form (based on the email address in Personnel).

Free trial

If a customer finds an app that they are interested in, they can request a free trial for trying out the app.

If an app is allowed to be tried out, a **Free trial** button will be available in the app's **Details**.



Customers interested in trying out the app can click the button - a registration dialog appears, which needs to be filled out completely - this includes accepting the *Planon terms and conditions*.

After completing the information, the user can click **Start trial**.

- You can only request a free trial for an app once.
- You can request a free trial for multiple apps - filling out a request for each app separately.
- A free trial lasts two weeks, during which the full functionality is available.

Validation

- You can only try out an app in a non-Production environment (Develop/Test/Accept).
- An app might not be compatible with your Planon version - the button is available but disabled. Hovering over the button will display the reason for the Free trial not being available.
- Is your account allowed to request a free trial:
  - your account needs to be added to the Marketplace setting for requesting a free trial. If your account is not part of the user group allowed to request a free trial, you will not be able to do so.
  - your account needs to be authorized to add app licenses.

Important

If your request complies with the mandatory validation checks, two things happen:

- the requested app license is automatically provided by the Marketplace and installed.

- the app is automatically downloaded and installed.

The app will then be available for immediate use.

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