



Navigation panel

Planon Software Suite

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About this Document

Intended Audience

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

Contacting us

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

Document Conventions

Bold

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

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

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

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About Navigation Panel

Navigation Panel is a TSI that allows you to configure a navigation panel for the various user groups in your organization.

In **Navigation panel**, you can:

- Create and logically group the available navigation items of a specific user group in navigation groups.
- Add navigation items to navigation groups.

A navigation item can be:

- a TSI
- [External content](#)
- a URL (web page)



This could be an entire URL or a relative URL (a URL relative to the **Externally accessible URL** field in [System settings](#). For an example on how this works, see [Field definer](#).

You can start a navigation item by clicking on it.



You can export/import navigation groups. For more information on the export/import of navigation groups, see [Configuration Transfer](#).

Configuring the Navigation panel

This section describes how to configure the Navigation panel for the various user groups. To configure the **Navigation panel**, you must complete the following steps:

- [Creating navigation groups.](#)
- [Adding navigation items to a navigation group.](#)

Creating navigation groups

You can create a navigation group for a specific user group:

Procedure

1. On the User groups selection level, select the user group for which you want to configure the navigation panel.
2. Go to Navigation panels.
3. On the action panel, click Add navigation group.
4. Click Save. You can now enter details for the new navigation group.
5. In the Language description field, enter a name for the navigation group in the relevant language.
6. The User groups field displays the system name of the user group the navigation group is linked to. You can also link other user groups to the navigation group by clicking User groups in the action panel.
7. In the Sequence field, enter the ranking number for the new navigation group on the navigation panel.
8. You can now add navigation items to the navigation group you just created by clicking on the options available in the action panel.



If users belong to two (or more) user groups, they get all the navigation groups of these user groups. If a particular navigation group is linked to more than one user groups, the users will see it only once.

Adding navigation items to a navigation group

Procedure

1. Go to User groups.
2. Select the user group for which you want to configure a navigation group.

3. Go to Navigation panels.
4. Select the navigation group that you want to configure. You can add navigation items such as TSIs and URLs (a web page).

If required, you can also add navigation groups to the navigation panel here.

5. Click Save.

The new navigation items are added to the navigation group.

If a user is part of multiple user groups, he/she may have multiple navigation items that open the same TSI. In such a case, the navigation panel shows all navigation items.

Configuring the navigation panel search

You can customize the auto-complete feature of the navigation panel search box by specifying the number of characters (1-4). By default this is set to 3.

Here's how to adjust it:

Procedure

1. Go to **Layouts > User settings** set it **Under construction**.
2. Add the field **Autocomplete search characters in navigation search?** (AutocompleteSearchCharacter) to the layout and click **Save**.
3. Set the layout to **Completed**.
4. Go to **User groups > Settings > User settings** > select your user and specify the number of characters (1-4).
5. Log out/Log in.

The new setting is now effective.

Navigating to other configuration TSIs

While configuring the navigation panel, you can quickly navigate to a TSI and its generic layout without having to search for or filter the TSI in the **TSIs**.

Procedure

1. Go to User Groups > Navigation Panels.
2. In the elements list, select a navigation group. For example, CAD Import.
3. Expand the navigation group and select a specific navigation item. For example, select CAD drawing definitions.
4. On the action menu, click Jump to TSIs.

TSIs opens and the navigation item appears. In this case: CAD drawing definitions.

5. On the action menu, click Under construction.
6. Configure the navigation item as required by adding selection levels and steps.



You can also navigate to Field Definer and Layouts for further configuring the business object and its layout.

7. On the action panel, click Completed when you are done.

Log out and login again to verify your changes.

Sorting the navigation panel

It is possible to sort navigation groups or navigation items within a group based on a sequence number. Duplicate sequence numbers will be sorted on name.

Procedure

1. Go to Navigation panels
2. Select a navigation group/item to which you want to assign a sequence number.
3. Enter a number in the Sequence field.

If sequence numbers are duplicate, sorting takes place first by sequence number and then by name. For example:

1. Contracts
1. Orders
2. Personnel
2. System Settings
3. Access 3. Assets



Self-Service web definitions do not have a sequence number, as they can be linked to multiple navigation groups. They are sorted by name.

4. Click Save.

The navigation group/items are sorted on the navigation panel, based on the assigned sequence numbers.

Displaying embedded content

Using the iWebPage API, app developers can create an app that implements a web page (external content).

As an application manager, you can display this web page in Planon.



The app needs to be available for you to be able to select it.

Procedure

1. In your navigation panel, go to Web client > Navigation panel.
2. Select the navigation group to which you want to add the app's web page.
3. Click Add embedded content on the action panel and in Class name, use the pop-up to select the app that implements the web page.

The required data is automatically filled in (Partner ID, App name, App module name)

4. Click Save and log out/log in.

The web page that is implemented by an app is now visible in the navigation panel.

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