Resource Planner Configurations

Planon Software Suite
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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.

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About Resource Planner Configurations

Resource Planner Configurations is a tool that enables application managers and planners to create multiple, authorizable **Resource Planner** configurations that can be used to assign work to resources (maintenance staff). It is possible to create configurations per team, region, country or per any other relevant criterion. Based on their permissions, users can switch between the configurations relevant to them. The configuration settings determine which teams, team members and columns are shown on the panels and which filtering applies to the list of unplanned orders. The planners working with **Resource Planner** can adjust the view of the TSI as required. They can, for example, switch the period view of the planboard or show and hide columns in the **Unplanned** panel.

> For more information on working with the **Resource Planner** TSI, see the *Resource Planner - User Guide*.

> If you are migrating from a *Planon ProCenter* release lower than R16 and are currently using a former generation of Resource Planner, please follow the instructions provided in the *Resource Planner Migration Guide*. You can find this document in the *Before you start folder* of the *Planon ProCenter* documentation set.

Resource Planner concepts and features

Principal concepts and features in Resource Planner:

- The tool is designed to plan and assign system order types such as **Work orders**, **Planned maintenance orders** and **Move orders**, or any user-defined variants based on these order types.

- It is possible to define various planboards for different purposes.

- Since it is a planning tool, orders with a **Technically completed**, **Administratively completed** or **Canceled** status are not displayed on the graphical planboard and cannot be selected from the **Unplanned** panel.

- Orders with an **On hold** or **Temporary fix** status and a start date before the actual date are automatically added to the **Unplanned** panel.

- No automatic status changes are applied in Resource Planner.

- It is mandatory to define role players and teams for planning purposes.

- Orders are automatically displayed on the planboard if the **Start date-time**, **End date-time** and **Internal tradesperson** fields of the order are populated.

- With regard to foreseen unavailability of a resource, the resource's personal calendar is applied. If this calendar is not available, the company calendar is applied.

- Types of unforeseen unavailability are configurable and can be added to a resource's time line on the planboard or via the **Personnel** TSI.

- Settings can be made to allow overlapping work, to allow for planning orders during overtime.

> **i** If you intend to switch to Planon's **Work assignments** feature, please refer to the *Work assignments* part of the user documentation and find relevant information on the implications, configuration and behavior in relation to Resource Planner.

> **i** If you use Resource Planner in combination with Planon Mobile Field Services (PMFS), make sure that the configuration of the **Assigned**, **On hold** and **Temporary fix** statuses of the two solutions are aligned. The status configuration for Resource Planner is done on the **Orders** business object in *Planon ProCenter* , **Field definer** > **Business Object settings**. The configuration for PMFS is done in *Planon ProCenter* , in **PMFS app settings**.

Resource allocations

Planon offers the additional *licensed* **Resource allocations** feature, to enable 'bulk planning' of work assignments. The feature allows you to pre-allocate specific periods to the available resources or teams on the graphical planner. Later, when you start with the actual planning, you can 'drag' work from the **Unplanned** panel into these allocated periods.

Typical use cases for **Resource allocations**: pre-allocation of a resource's or a team's working time to projects in specific buildings or to specific customers.

In the standard **Resource planner** you 'plan' the work by dragging an order from the **Unplanned** panel onto a resource (internal tradesperson / field engineer) on the planboard. A work assignment is subsequently created in the given time slot. With a **Resource allocations** license, you can drag multiple orders from the **Unplanned** panel to a pre-allocated time slot, i.e. a **resource allocation**, and thus create multiple work assignments there. If you select the resource allocation on the planboard, the **Allocated** panel is activated, displaying these work assignments. See Resource Planner screen layout for a screen overview.

> **i** The **Allocated** panel is unavailable (grayed out) to unlicensed users.

Planon calculates how many working hours are left within selected resource allocation and displays the remaining hours in a tooltip. Once the work is assigned, the resources themselves have control over which work assignment they pick up first within the allocated period(s).

You can configure and use the **Resource allocations** feature directly in **Resource planner**. On the planboard, a wizard will guide you through the planning and scheduling process. See Adding resource allocations and resource allocation periods for information about adding **Resource allocations**.

The **Resource allocations** feature also includes a separate, supporting **Resource allocations** TSI. This TSI allows planners to add, edit and delete resource allocations (it includes the same functionality as the graphical planner), but the main purpose of this TSI is *monitoring* resource allocations and *reporting* on them. Planon application managers can add this TSI to the appropriate navigation panel(s).

> For information on configuring **Resource allocations**, see Configuring resource allocations.

Creating teams and roles

In order to be able to work with the **Resource Planner** TSI, you must create maintenance teams that can be linked to one or more planboard configurations.

Procedure

1. In *Planon ProCenter*, go to Supporting data > Roles.

2. On the Roles selection level, add the roles you want to configure for a team, for example *maintenance engineer* or *coordinator*.

3. Navigate to the **Personnel** TSI and add a *placeholder person* representing the maintenance team. This 'team person' will make it possible to assign orders to a team (for use on Planon PMFS apps).

4. Go to Supporting data > Maintenance teams.

5. On the Teams selection level, add the team(s) you want to use on the Resource Planner planboard.

> ℹ️ Teams are archivable. This means teams that are no longer relevant / active can be transferred to the archive. Conversely, you can retrieve the teams you want to 'reactivate' from the archive. To do this, your application manager must make the 'Transfer to archive' and 'Retrieve from archive' actions available on the relevant layouts.

6. On the Role players selection level (in Accelerator: Maintenance team members) add individual team members to the existing team(s).

These role players must be of the RolePlayerPerson system type.

7. Next, add one 'role player' that represents the team and link it to the placeholder 'team person'.

8. In **Layouts**, make sure that the **Team** field is available on the relevant layout(s) of the **Personnel** business object.

> ℹ️ When the **Team** field of a (placeholder) person is populated, this person effectively represents a team. So, if this person is entered as **Internal tradesperson** on an order, the order can be sent to the mobile devices of all team members, as a team order. The first team member who accepts the order is filled in on the order. The order is then removed from the devices of the other team members.

Adding Resource Planner configurations

In **Resource Planner Configurations**, you can define one or more planboard configurations. This is typically a task for a Planon application manager, but planners (the planboard **Owners**) can also create planboard configurations. You can for example create a separate configuration for each team, or link multiple teams to planboards that are based on practical criteria, such as region or work order group.

> The layout of **Resource Planner Configurations** is customizable. For information on a recommended layout, see Creating a layout for Resource Planner Configurations TSI.

Procedure

1. Go to Resource Planner Configurations.
2. Click Add on the action panel.
3. Enter a code and description for the planboard configuration.
4. In the Owner field, select the person doing the actual planning on the planboard.
5. In the Filter for 'Unplanned' panel field, select the filter criteria for the unplanned work list and click OK.

For example, if you want to see the work for particular properties, you can select those properties. Choose any relevant criteria from the dialog or make a combination, using the advanced filter criteria.

6. In the Fields for 'Unplanned' panel field, select the predefined customizable list that determines which fields are shown as columns on the Unplanned panel.

For more information on defining a customizable list, see Configuring the Unplanned panel.

7. In the Fields for planboard tooltip field, select the predefined customizable list that determines which fields are shown in the tooltips on the planboard.
8. Select relevant values in the Start time of planboard and End time of planboard fields, if you want to configure the planboard's day view. The hours between the defined start time and end time of the planboard will be displayed, instead of a 24 hour view.
9. In the Allow overlapping work field, select one of the following options:

   ◦ Overlapping work not allowed - no overlapping work is allowed on the planboard.

- ◦ Overlapping work allowed / occurrences highlighted - overlaps are allowed and the overlapped instances are underscored with a thick red line.
- ◦ Overlapping work allowed / occurrences not highlighted - overlaps are allowed, but the overlapped instances are not marked. This is the default setting.

10. In the Allow planning of overtime? field, select Yes to allow planning outside working hours or No to prevent it. However, if you select No, but orders / work assignments are planned outside working hours somewhere other than on the planboard, they will be displayed with a red border.

11. Save the configuration.

12. On the action panel, click Link teams to link relevant team(s) and click OK.

For more information on creating teams, see Creating teams and roles.

The planboard configuration is now available in the Resource Planner TSI.

If you want to give specific user groups or users access to this **Resource Planner configuration**, proceed as follows:

13. On the action panel, click Link user groups and / or Link users to link specific user group(s) and / or users to the configuration and click OK.

- ◦ the **Resource Planner configuration** will only be visible to those user groups / users who are linked as mentioned in the above step.
- ◦ If no users or user groups are linked to a **Resource Planner configuration**, the standard authorization applies.

You can add more Resource Planner configurations as required. The following usability tips may be helpful:

> • Use the **Copy** action to quickly create new configurations for different owners, teams, regions and so on.
> • With authorization you can limit the number of configurations a planner can use. For example, authorization on the **Owner** field gives planners access to their own planboards. If required, you can also different fields, such as free fields, for authorization purposes.
> • When making changes in either the planboard or the **Unplanned** panel, only the items which are directly impacted are automatically updated, to enhance performance. This *refresh* behavior implies that users may sometimes have to refresh manually. For example, if multiple people are working with the same Resource Planner configuration and they want to see all changes.

Additional configuration information

In *Planon Accelerator*, the **Resource Planner** configuration is complete and ready to use. However, for users with existing configurations, the following overview provides some background on the configuration. It can be used for making additions and changes that suit your preferences.

The following Planon ProCenter TSIs are involved in the configuration of the **Resource Planner** tool:

- **Navigation Panel** - to add the following TSIs to the navigation panel: **Resource Planner** and **Resource Planner Configurations**.

- **Layouts**

  - to create a relevant layout for the **Resource Planner Configurations** TSI

  - to add fields to the layouts of **Standard orders**, **Orders** and **Work assignments**.

> ⓘ • If the **Work assignments** license and feature switch are <u>not</u> activated, it is recommended to add the **Effort** field to the layouts of **Standard orders** and **Orders**, because the field can be used to predefine an effort in a standard order and to calculate the real effort on planned maintenance orders.
> • If the **Work assignments** license and feature switch are <u>are</u> activated, refer to the *Work assignments* documentation, for more information on the relevant work assignment fields on the **Work assignments** layout.

  - to create layouts for the user-defined business objects of **Resource activity**, which are used to differentiate between resource activity types on the planboard (unforeseen unavailability of resources).

  - to enable the order layout(s) in the **Order details** pop-up, per user-defined order type. This pop-up can be invoked in Resource Planner for both planned and unplanned orders.

- **TSIs** - to customize the columns of the **Unplanned** panel and the tooltips.

- **TSIs** - in order to be able to display **Order details** and **Work assignment details**, add the relevant **Resource planner details** steps to the **Resource Planner** TSI. You can select: Work assignment details, Work assignment context, Order details, Order lines, Labor hours,Personnel and Communication logs.

- **Authorization** - to create the required permissions in **Resource Planner**.

- Supporting data > Roles, to add the role players (resources) to the teams.

- Supporting data > Maintenance teams, to create the teams including the resources.

- **Resource planner configurations** TSI to configure the planboard, resources and unplanned orders in **Resource planner**.

- **Field definer** TSI:
  ◦ to create user-defined business objects on the **Resource activities** business object (unforeseen **Unavailability**).
  ◦ to make **Order settings** on the **Orders** business object, for the Resource Planner's **Planned**, **Assigned**, **On hold** and **Temporary fix** statuses.

Business objects required for Resource Planner

In *Planon Accelerator*, the **Resource planner** configuration is complete and ready to use. In that case, the following information can be used for additions and changes that suit your preferences.

The following Planon ProCenter *business objects* are involved in the configuration of **Resource Planner** tool:

• **Orders** - Resource planner supports the system types **Work orders**, **Planned maintenance orders** and **Move orders**, or any user-defined variations of these order types.

Tip	See Field definer >Work assignments for more information about the Order business object settings that apply in Resource Planner.

• **Work assignments** - **Resource planner** supports the planning of **Work assignments** on the planboard. Work assignments make it possible for one person or multiple persons to work on the same order simultaneously or at different times.

Tip	See the *Work assignments > Work assignments in Planon ProCenter* user documentation for more information about license, feature switch, status mapping.

• **Order statuses** - In Field definer > Business object settings you must link the **On hold** and **Temporary fix**, **Planned** and **Assigned** user-defined statuses that are required for **Resource Planner**.

Tip	See *Field definer > Business object settings* for more information.

Note	**Resource Planner** is a planning tool, so orders that are **Completed** or **Canceled** are not displayed on the **Unplanned** panel.

• **Resource planner configurations** - in the **Resource planner configurations** TSI, planners can define their own configurations. Each configuration contains a definition of the resources and the orders which can be used for planning purposes.

• **Teams** and **Roles** - for planning purposes it is mandatory to define maintenance teams and roles in the **Maintenance teams** and **Roles** TSIs. See **Resource planner configurations** > Creating teams and roles for more information.

• **Resource activities** - can be used to create user-defined business objects, user-defined statuses and a default status for unforeseen, incidental *unavailability of resources*. Examples of user-defined business objects that can be added for unforeseen unavailability: Illness, Training, Special leave and so on. These unavailability business objects are displayed as context menu options in **Resource planner** planboards when dragging a new bar (activity) on the planboard. The selected unavailability option is displayed on the time line of the resource.

Tip	• Foreseen unavailability of resources, such as non-office hours and national holidays are displayed in a light shade of gray on the **Resource**

planner planboards. These are derived from the company calendar and personal calendars as defined in System settings > Calendars. See *System settings* for more information on defining a company or personal calendar.
- For more information on configuring user-defined business objects and user-defined statuses, see *Field definer*.

Enabling batch status changes to Planned or Assigned

In **Resource planner** it is possible to perform batch status changes for the work on the planboard.

Using these batch status changes on the planboard, you can easily set multiple work assignments to either the **Planned** or the **Assigned** status. These batch actions become available if you configure the **Planned** and **Assigned** order statuses in the **Field definer** TSI.

> ℹ️ For more information on making **Business object settings** for **Orders**, see the *Field definer > Resource planner status mapping*.

Configuring columns for the Unplanned panel

You can configure which columns are shown to users on the **Unplanned** panel of the Resource Planner. You do this by defining a customizable list and linking it to the Resource Planner's **Unplanned** panel. The customizable list will determine which set of order fields are displayed as columns on this panel. Whilst working with the planboard, users have the option to show and hide columns from this predefined set, as required.

Procedure

1. Go to Resource planner configurations.
2. Select the configuration for which you want to configure columns.
3. In the Fields for 'Unplanned' panel field, select the Select a value icon.

   The Fields for 'Unplanned' panel dialog window is displayed.

4. Click Add on the action panel to define a new customizable list.
5. Enter a description for the customizable list.
6. Add the fields that you want to display as columns to the In use section.

> ℹ️ Except for the **Comments** field or other fields that may hold a great number of characters, most **Order** fields can be used as columns. The recommended fields include: **Number**, **Description**, **Property.Code**, **Property.Description**, **Start date & time**, **Requested completion date-time**, **Effort**, **Internal tradesperson.Surname**, **SLA service.Code**, **SLA**

service.Description. If you have activated the **Multiple work assignments** feature in Field definer , you might also want to add the **Original budgeted hours** field, the **Remaining no. of budgeted hours** field, and some **PlanningStatus** fields (Code, Label).

7. Use the up / down arrow buttons to move the fields and determine the sequence in which the columns appear.

8. On the action panel, click Generate display value and click Save.

9. Click OK.

Configuring TSI user filters for the Unplanned panel

In Resource Planner it is possible to apply a *TSI user filter* to the **Unplanned** panel. A TSI user filter is typically created by an application manager to ensure that all end users use an identical filter mechanism for specific data.

With the following procedure, you can configure a *TSI user filter* for unplanned work in Resource Planner. Example: you want ensure that the same criteria are applied to all Resource Planner planboard configurations when users are filtering the **Unplanned** panel by 'EMEA' region (Properties in Europe, Middle East and Africa). You can configure this as explained below.

> For general information on TSI user filters, see **TSIs** > **Creating a TSI user filter**, in the user documentation.

Procedure

1. Log in with your administrator / supervisor credentials.

You start by making a required selection step available in Resource planner.

2. Go to ProCenter modules > **TSIs** .

3. On the elements panel, select the Resource planner TSI (In Planon Accelerator: Core - Resource Planner).

4. Click the padlock symbol to set the TSI under construction.

5. Select the Resource planner details tab.

6. At the selection steps, click the plus sign.

   the Add or remove steps dialog opens.

7. Select the ResourcePlannerOrderStep and move it to the Selected section.

8. Click OK.

9. Click the padlock symbol to set the TSI to completed.

You proceed by linking a relevant TSI user filter to the selection step you just added.

10. On the navigation panel, go to ProCenter modules TSI filters.

11. On the elements panel, select the relevant Orders business object (Base, System or User-defined).

12. Go to Filters > User filters.

13. On the action panel, click Add.

14. Set the criteria you want to use for the TSI user filter on the Unplanned panel and click OK.

Example: a filter on the Orders business object for Properties from Europe Africa and the Middle East (EMEA region).

15. On the action panel, click Group filter.

16. At Available, select the Resource Planner unplanned orders selection step.

17. Click OK.

The configured TSI user filter can now be selected and applied on the Unplanned panel of all Resource planner planboards.

Creating a layout for the Resource planner configurations TSI

In *Planon Accelerator*, the **Resource Planner** configuration is complete and ready to use. The following information gives some background on the configuration and can be used for additions and changes that suit your preferences.

In order to work with the **Resource planner configurations** TSI, the layout must be configured as follows:

Procedure

1. Go to **Layouts** .

2. On the All business objects selection level, select Resource planner configurations.

3. On the Layouts selection level, select the ResourcePlannerConfiguration layout and put it under construction by clicking the padlock icon.

4. Add the following fields to the layout: Code, Name, Owner, Fields for 'Unplanned' panel, Filter for 'Unplanned panel', Allow planning of overtime?, Allow overlapping work?, Fields for planboard tooltip, Start time of planboard, End time of planboard.

You may also want to add bars, to place the fields in logical sections.

5. Click Links on the action panel.

6. Add the Link teams action to the layout and click Save.

7. *Optional*: if you want to enable planners to link specific user groups or users to the ResourcePlannerConfiguration layout, add the Link user groups and / or Link users actions to the layout and click Save.

If no users or user groups are linked via these links, the standard authorisation will apply.

8. Set the layout to Completed by clicking the padlock icon.

   You have now created the layout for the Resource planner configurations TSI.

> ℹ️ For more information on creating layouts, refer to *Layouts* .

Customizing tooltips

Resource planner has a default setting for displaying tooltips, showing the order code, description, type, status and icon. It is, however, possible to customize the tooltip content. This is done by defining a customizable list in the **Resource planner configuration**. The customizable list determines which order fields are displayed in the tooltips on the planboard. Only the first 10 extra fields that you add will be displayed. Depending on your preferences, you can link a different tooltip customization to each planboard.

P r o c e d u r e

1. Go to Resource planner configurations.
2. On the Planboard settings tab > Fields for planboard tooltip field, select the Select a value icon.

   The Fields for planboard tooltip dialog window is displayed.

3. Click Add on the action panel to define a new customizable list.
4. Enter a description for the customizable list.
5. Add the fields that you want to display in the tooltips to the In use section.
6. Adjust the order of the fields as required, by moving fields up or down.
7. Click Generate display value and click Save.
8. Click OK.

Configuring the tabs of the Resource planner slide-out panel

With the correct license and configuration it is possible to configure order details on a separate slide-out panel within Resource Planner. This will save planners the trouble of going to the **Work Orders** TSI to view this data.

You can configure the display of details on planned or unplanned work in Resource Planner, for example the display of order lines and communication logs.

P r o c e d u r e

1. Go to ProCenter modules > **TSIs** .

2. On the elements panel, select the Resource Planner TSI (In Planon Accelerator: Core - Resource Planner).

3. Click the padlock symbol to set the TSI under construction.

4. Select the Resource planner details tab.

5. At the selection steps, click the plus sign.

   the Add or remove steps dialog opens.

6. Select the steps you want to display as tabs on the Resource Planner slide-out panel and click OK.

7. Click the padlock symbol to set the TSI to Completed.

8. Log out and log in to Planon ProCenter to view the result in the Resource Planner TSI.

> ℹ The following step can be configured especially for the **Service providers** solution mode: **Subcontractor lines**.

Configuring unavailability of resources

If you want to display various types of unavailability for team resources on the **Resource Planner** planboards, you must configure user-defined business objects, status transitions and layouts for the **Resource activities** business object.

P r o c e d u r e

1. Go to Field definer .

2. On the Business objects selection step, select the Resource activities business object and set it to Under construction.

3. Add user-defined business objects for unforeseen unavailability, for example Illness, Training and Holiday.

> ℹ For information on creating user-defined business objects, see *Field definer > Creating user-defined business objects*.

4. Create a user-defined default status and status transitions for these user-defined business objects.

> ℹ For information on creating user-defined statuses, see *Field definer > Creating user statuses*.

5. Select an icon for each user-defined business object. This icon will also be displayed on the planboards.

The default icon for unavailability is: ⃠.

Icons such as 🏷, ⬜, ☼ or similar are suggested for specific (user-defined) resource activity types, such as 'Illness', 'Training' and 'Holiday'.

6. Set the business object to Completed.

7. Go to Layouts to create simple layouts for the user-defined business objects.

8. On the Details panel, select Yes in the For use in pop-up field to make the business object available for selection when creating an unavailability record in the Resource Planner.

> ℹ️ For information on creating layouts, see *Layouts* .

> ℹ️ Recommended fields to add to the layouts are: **Start-date time**, **End date-time**, **Person**, **Description** and **Comments**.

The user-defined business objects can now be used to manage unforeseen unavailability in Personnel and on the Resource Planner planboards.

Configuring a map view in Resource Planner

With the correct license and configuration it is possible to configure a map view on the Resource Planner planboard.

You can add a toggle button that will display a geographical map. The map view will support planners in making an efficient and realistic planning per resource (i.e. tradespeople, engineers), by showing the geographical locations of their last known, current and / or future work assignments.

> ℹ️ Make sure that the appropriate *license* is used in System settings > Licenses

Procedure

1. Go to Planon ProCenter > **TSIs** .

2. On the elements panel, select the Resource Planner TSI (In Planon Accelerator: Core - Resource Planner).

3. With the Resource Planner selection step selected, click the padlock symbol to set the TSI under construction.

4. At the Step settings tab, go to the Linked step actions field and click the Select a value icon.

5. Move the Activate map view step action to the In use section and click OK.

6. Click the padlock symbol to set the TSI to Completed.

7. Log out and log in to Planon ProCenter to view the result in the Resource Planner TSI.

The Activate map view button is available on the toolbar in Resource Planner.

> ℹ️ For more information on the map view in Resource Planner, see Displaying a map view on the planboard.

Configuring resource allocations

Within Resource Planner, Planon provides an additional *licensed* feature that allows for pre-allocating periods to resources (tradespeople / engineers), which can be used for (bulk) planning of work assignments. This means that you can first allocate resources to specific periods on the graphical planner and 'drag & drop' the actual work into these allocated periods later. Once planned and assigned, the resources themselves will have control over which work assignment they pick up first within the allocated periods.

This task will take you through the configuration process. It is assumed that the required license is already registered in Planon.

Procedure

1. In Planon ProCenter , navigate to Field definer .

2. On the **Business object level**, select **Resource planner configurations**.

3. On the action panel, select **Under construction**.

4. On the action panel select **Business object settings**.

5. In the Resource planner configuration settings dialog, set the field **Activate 'Resource allocation' planning behavior?** to **Yes**.

6. Click **Save** and **Close**.

7. On the action panel, select **Completed**.

8. Next, on the navigation panel, navigate to the **Resource planner configuration** TSI.

9. Make sure that the fields **Fields for 'Allocated orders'** and **Fields for 'Allocated work assignments'** are available on the layout. If not, add them to the **Resource planner configurations** business object in the **Layouts** TSI.

You will need these fields to be able to add *columns* (fields) to the Allocated panel in Resource Planner. It is up to you which Order fields and Work assignment fields must be displayed there.

10. In one or both of these fields, you can click the **Select a value** icon to open the relevant configuration pop-up.

11. On the action panel, click **Add** to create a new configuration, or select an existing configuration for editing (in that case proceed with step 13).

12. Fill in a **Description** and adjust the **Overrule default tree view sorting?** setting as required.'

13. On the **Available panel**, select the fields you want to add as columns to the layout of the **Allocated panel** and move them to the **In use** section. For example: **Number**, **Description**, **Status**, **Effort**.

14. On the action panel select **Generate display values**.

15. Click **Save** and **OK**.

    The columns for orders / work assignments are now available on the Allocated panel of this Resource planner configuration.

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