



# Web Configuration

## Planon Software Suite

Version: L105

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## 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.

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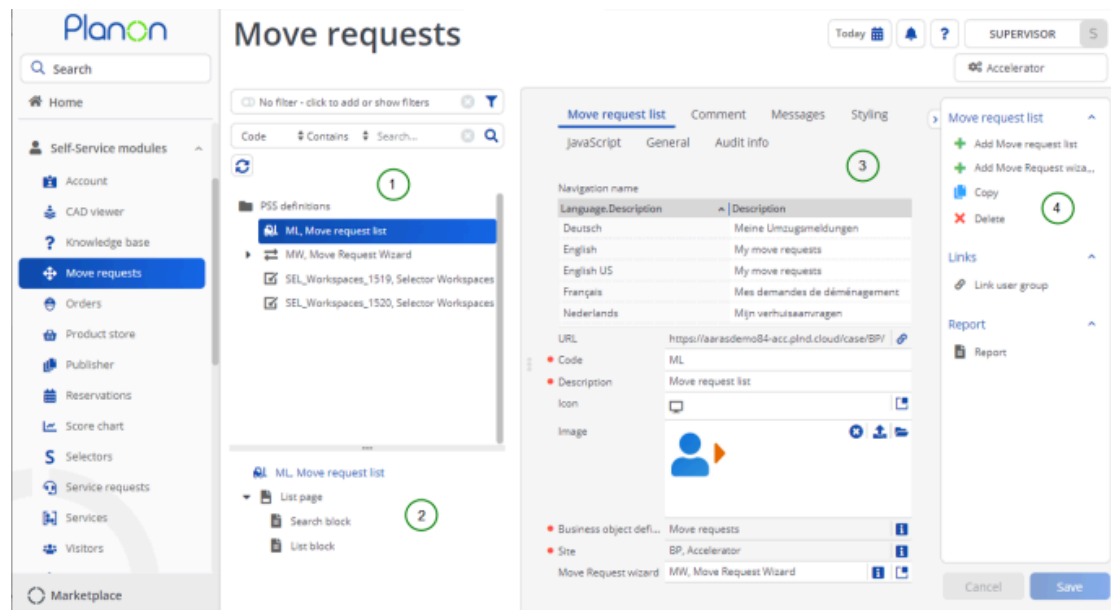
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# Web Configuration – Overview

Web Configuration allows you to configure web forms in accordance with your requirements.

The Web Configuration layout can be made available as a TSI on the Web Configuration Navigation Panel .

This image shows the Web Configuration layout.



- 
- |   |                       |
|---|-----------------------|
| 1 | Web definitions panel |
| 2 | Details panel         |
| 3 | Data panel            |
| 4 | Action panel          |
- 

Using Web Configuration , you can create web definitions for Visitors, Orders, Service requests, Reservations, Move requests and many more.

Web Configuration enables you to:

- add and configure sites
- add and edit web definitions for a specific usage of the end users
- link web definitions to a site
- import/export site definitions

- add detail and list pages for web definitions
- link user groups to pages.
- link Navigation Panel groups to pages
- add CSS styling to pages
- enable search features in list pages

# Web Configuration - Concepts

## Sites

A unique site can be created for a specific customer base. A service provider can create a site per customer.

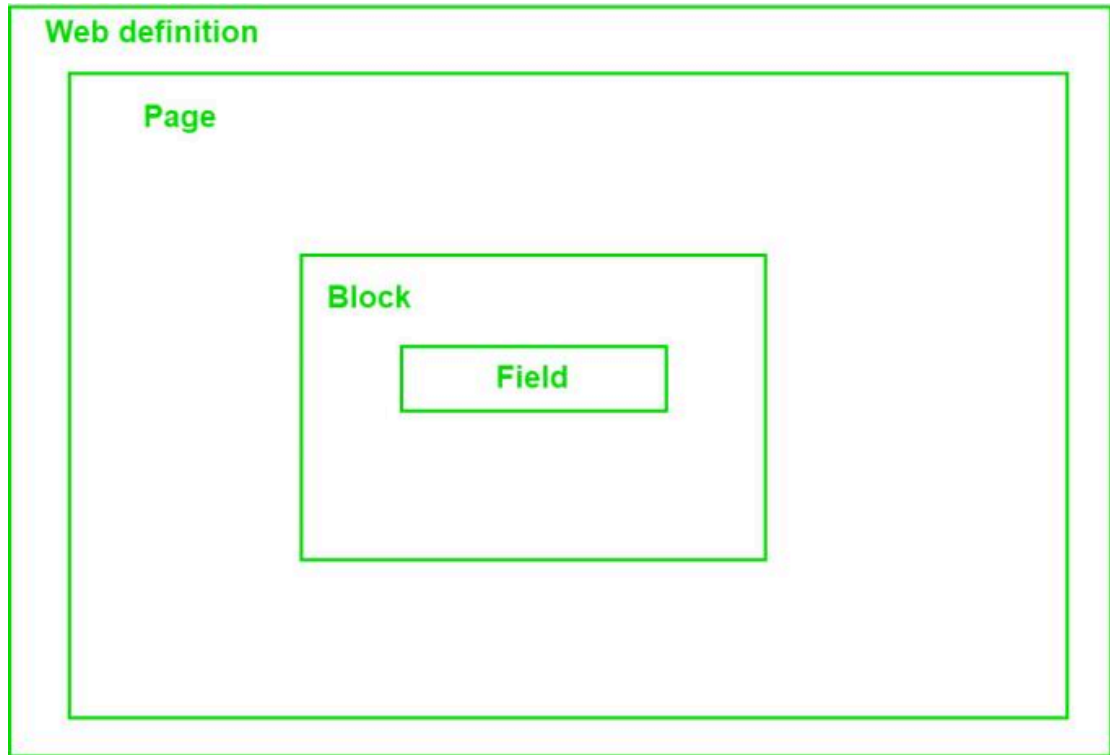
For example:

- an educational organization may want different sites for staff and students.
- A company can create two different sites - an internal site for employees, and an external site for customers.

Multiple sites can be added in a single property set. Sites are property set dependent. They can be shared within a specific property set, but will not work when imported into another property set. The web definitions linked to a site, however, can be shared across property sets.

## Web definitions

A web definition defines the content of a set of web pages. The image explains the structure of a web definition in Web Configuration .



A web definition can have one or more pages. A page can have one or more blocks and a block can have one or more fields or other content like text, chart or file upload options.

## Generic information

These generic features are available in all Web Configuration modules.


### List page

The Web Configuration **List page** is a generic page available across all the modules. On the **List page**, you can configure page titles, button names and field names. You can also specify a hint text that provides additional information or instructions to the end user.

Tabs	Description
Page properties	Allows you to change the page title. Select the check box of the language(s) for which you want to provide a customized translation. Enter the new title and click <b>Save</b> .
Help text	Allows you to add additional information to the user about how to use the page. Enter the help text in the required language(s). This help

Tabs	Description
Actions	<p data-bbox="803 247 1312 310">text will be displayed on the top of the Web Configuration page for the end user.</p> <p data-bbox="803 344 1289 407">Displays module-related action button(s), which you can make available to users:</p> <ul data-bbox="834 426 1182 1251" style="list-style-type: none"> <li data-bbox="834 426 1138 489">• <b>Add:</b> available in the <b>Visitors</b> module.</li> <li data-bbox="834 508 1174 571">• <b>Search:</b> available in the <b>Publisher</b> module.</li> <li data-bbox="834 590 1174 653">• <b>Submit:</b> available in the <b>Orders</b> module.</li> <li data-bbox="834 672 948 699">• <b>Back</b></li> <li data-bbox="834 718 1182 1251">• <b>Print all:</b> available in modules where pagination is available. For example, <b>Publisher, Reservations, Service requests</b>. This setting allows the end user to print all records of a list page in a Web Configuration module. You can configure the maximum number of records that can be printed by the user. The maximum allowed is 5000 records.</li> </ul> <p data-bbox="878 1270 1279 1436">This option can also be enabled for <b>Publisher charts</b>. If you select <b>Yes</b> in the <b>Is visible</b> field, a print button will be displayed on the selected publisher chart.</p> <ul data-bbox="834 1455 1190 1698" style="list-style-type: none"> <li data-bbox="834 1455 1190 1654">• <b>CSV export:</b> This feature is only available in the <b>Publisher</b> module. You can set the CSV delimiter option to either full stop (.) or comma (,)</li> <li data-bbox="834 1673 971 1701">• <b>Cancel</b></li> </ul> <p data-bbox="803 1719 1252 1782">You can configure the following action properties for the buttons:</p> <ul data-bbox="834 1801 1187 1864" style="list-style-type: none"> <li data-bbox="834 1801 1187 1864">• <b>Is visible Yes/No.</b> Select <b>Yes</b> to make the action</li> </ul>



Tabs	Description
Styling	<p>button available to the user.</p> <ul style="list-style-type: none"> <li>• <b>Label</b> - allows you to edit/change the label of the button.</li> </ul> <p>Enables you to override the default styling and apply your own specific styling.</p> <p>In the CSS box, specify your CSS for the site and all its definitions.</p> <div data-bbox="673 625 1321 711" style="border: 1px solid #0070C0; padding: 5px;"> <p> Only a valid CSS, compliant with the W3C standards is permitted.</p> </div> <p>CSS class names should all be in lowercase. The default CSS is defined in pss.css. This is the default style sheet delivered with PSS.</p>

The following example shows how a Planon default CSS can be modified to develop a custom CSS.

```
.pss_field div.pss_field_label{
display: inline-block;
width: 165px;
margin-right: 15px;
text-align: right;
font-size: 14px;
color: #404040;
float: left;
}
```

Custom CSS	Result
<pre>.pss_field_label { color: red; }</pre>	<p>Default CSS will be used because the custom CSS is lacking "importance".</p>

---

## Custom CSS

```
.pss_field_label { color: red !important }
```

```
.pss_custom  
div.pss_field_label  
{ color: red; }
```

## Result

Custom CSS will be used. All fields with the `.pss_field_label` class will be styled in red.

Custom CSS will be used, only the field description will be styled in red.

---

## List block

---

### List fields tab

Enter the fields for which results must be returned to the user. Click the **Add fields** button and select fields from the **Add fields** dialog box.

### Fixed filter

Click **Select a value** if you want to create a filter. Filtering is powerful functionality, for example to pinpoint the Reservation list definition to:

- A specific visitor
- A specific person

And so on...

For adding fields to the filter list, see [Field is missing from a fixed filter](#).

### Layout

Select the layout in which the results will be displayed: **Table** or **Field set**.

For more details, refer to [List layout](#).

### Max. number of rows

Specify the number of results to be displayed in the list block. If the number of results exceeds the number specified here, navigation buttons will be shown so the user can navigate through the results.

### Display number of results

Select **Yes** if you want to display a count of the results on the web form:



The count and navigation arrows will be displayed at the top of the list.

For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.

---


## Search block

A page that is displayed to enable users to search for specific information, such as co-workers (personnel), work orders, assets, products etc.

---

### Search fields


On the **Search fields** tab, specify the search fields you want to display.

 For reference fields, you can choose from two operators: = and **In**. With = (equal to), you can filter by one single criterion. With **In**, you can filter by multiple criteria at the same time.

### Search immediately

If you enable **Search immediately**, the search results will immediately be available to the user when displaying the form (in this case, the search will be non-specific).

If you select **No**, the user must click on the **Search** button to show the results in the list block.

 For improved usability, it is recommended to turn on **Search immediately**. However, this may impact the performance of the system.

### Field properties

#### Mandatory

If **Yes**, the search field requires a value in order to search.

#### Read only


If **Yes**, the search field is not editable for end users.

#### Is visible

If **No**, the field is not visible for end users \*

#### Split search string

Select **Yes** to enable searching on multiple search terms in random order.

 This selection is only applicable when **Contains** is selected in the **Operator** field.

#### Allow as HTTP parameter

If **Yes**, it is possible to fill a field via a parameter added to the URL.

Pinned by default?

Enables you to determine which fields should be pinned to the search form.

The first field in the configuration is always displayed to users and hence the **Pinned by default?** setting is **Yes** (and is invisible). For all other fields, this setting is configurable.

You can determine the order of fields by moving them up or down by using the respective button.

The first field in the configuration becomes **Pinned by default**. If this field is removed, the subsequent field becomes **Pinned by default**.

Note that implicit user settings are only created if the user manually pins or unpins a field on the search block.

Until that happens, all changes done in the Web configuration will be reflected on the user's form.

---





## List layout

You can configure the layout of a **List block** to specify how the results are displayed on the web page.

Knowledge base has a fixed layout. Other modules have two types of list layouts available:

### 1. Table

The results are presented in table format. Use this layout if you want to enable users to find a specific result in a list. For example, a specific person in a phone book.

Adams	John	+44 (0) 2075016055	
Adams	Harry	+44 (0) 2075015046	
Alkin	Richard	+44 (0) 2075016159	
Alkin	Matt	+44 (0) 2075015096	

### 2. Field set

The results are presented in a set of fields. Fields 1 and 2 are on the same line and the rest of the fields will be displayed below each other.

This layout is ideal for creating a compact row layout. For example, a photo on the left, and text on the right.

If you do not want to display the label of the first field, for example, **Photo**, you must clear its translation.

## Field properties

Select a field to display the **Field properties** tab.

The following field properties can be assigned to each field on the List page:

---

Field property	Description
<b>Is visible</b>	Select <b>Yes</b> to make the field available on the web form.
<b>Sort on field</b>	Select <b>Yes</b> to enable the sorting of list items. The default sort order of the fields is from top to bottom / left to right.
<b>Sort ascending</b>	Select <b>Yes</b> to sort the fields in the ascending order. If <b>No</b> is selected, the fields are sorted in the descending order.
<b>Deviating sort order</b>	<p>This is a numeric field which can be used to overrule the default sort order.</p> <ul style="list-style-type: none"><li>- Filling in a number, for example '1', will determine the priority of sorting.</li><li>- Filling in an equal deviating sort order, for example '1' in two fields, will sort these fields first by the filled in number and then according to the default sort order.</li><li>- Leaving some fields empty will sort these fields last, only after completing the default sort order.</li></ul> <p><b>Example:</b></p> <ul style="list-style-type: none"><li>- Field order in Web configuration: Number, Description, Reservation unit, Start date &amp; time, End date &amp; time, Requestor.</li><li>- Deviating sort order: Number = 2, Description = 3, Reservation unit = (empty), Start date &amp; time = 1, End date &amp; time = 1, Requestor = (empty)</li><li>- Sort order on the web form: Start date &amp; time, End date &amp; time, Number, Description, Reservation unit, Requestor.</li></ul>

---

## Additional SQL

Additional SQL statements can be used to construct customized SQL queries.

If the fixed filtering feature does not return the required result, you can extend this feature by constructing your own customized SQL queries in the **List block**, to display the required result.

For more information on additional SQL, refer to [Appendix – Samples of Additional SQL](#).



Using this feature requires in-depth knowledge of SQL statements.



For more information about the data structure of the database, see the [Planon data dictionary](#) (credentials required), an HTML page that contains detailed information of the Planon database and which is updated each time the data structure is changed.

The additional SQL statements are added to the WHERE clause of the query.

### Example

```
Select  
<column name>  
From  
<table name>  
Where  
<condition>  
<advanced SQL statements>  
Order by  
<column name>
```

Additional SQL statements must always start with AND or OR. If you want to filter on a field of the main table, you must prefix it with "MAIN\_TABLE.". For example, "AND MAIN\_TABLE.NAAM LIKE '%aa%'"

You can also use the following macros:

Macro	Description
&DATASECTION	Retrieves the current data section.
&PERSON	Retrieves the logged in person (the account needs to be linked to a person).
&PERSON.PROPERTY	Retrieves the property of the logged in user.
&PERSON.SPACE	Retrieves the space of the logged in user.
&PERSON.DEPARTMENT	Retrieves the department of the logged in user.
&PERSON.ADDRESS	Retrieves the address of the logged in user.

Macro	Description
&PERSON.COSTCENTER	Retrieves the cost center of the logged in user.

For example, `AND MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE SYSCODE = [&PERSON])`



You must write the macros within brackets. For example: [&PERSON].

## Context fields

In addition to using macros it also possible to use context fields. Context fields can be used when the field that you want to filter on is not available as a search field.

The syntax of a context field tag is as follows: [&system\_name\_of\_context\_field]



- The system name is case sensitive.
- Currently, only reference fields are supported.

### Example

For a Property field, use the following syntax: [&PropertyRef]

For filtering requestors based on a selected property, you can use the following SQL:

```
AND ((MAIN_TABLE.SYSCODEOBJ = [&PropertyRef]) OR ([&PropertyRef] = -1))
```

When the user did not enter a property, the OR statement will ensure that all requestors are displayed. If you leave out the OR statement, no requestors are displayed.



### Additional SQL for Reservation Wizard Planboard -

the Additional SQL for Reservation Wizard Planboard differs slightly from the way queries are usually constructed.

The planboard queries are on the table RESEENH (reservation units). However, since there is an underlying complicated query, you cannot use `MAIN_TABLE`, but must use `TABLE_1` which is derived from the ProCenter query.

Example:

```
and TABLE_1.NAAM LIKE '%roomname%'
```

This query would give all reservation units with a name like "roomname".

## Show / hide action buttons

By default, all actions on a Web Configuration form are visible. You can however hide actions. This is a generic configuration, available for actions in all modules. For example, the **Status changes** action buttons are only necessary for the reception desk and not for

registering visitors. In such a scenario, you can hide the buttons from the forms that are available for the non-reception desk workers.

To show/hide actions buttons

1. Open the module on which you want to show/hide the action buttons.  
For example, Visitors.
2. Click on the Details page.
3. On the data panel, click the Actions tab. The available buttons for the Details page are displayed.
4. Click an action that you want to show / hide. For example, Arrived.
5. To hide the button, select No in the Is visible field. The Arrived button is no longer displayed on the Visitors form.

## 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.



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.



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](#).



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

## CAD Viewer

In this Web Configuration module, you can configure how a CAD drawing should be displayed in the modules linked to the CAD viewer, such as Publisher.



End users cannot view CAD viewer independently on a Web Configuration form. It must always be linked to a Web Configuration module where CAD drawings can be viewed.



See [Configuring CAD Viewer](#) for more information.

# Configuring generic features

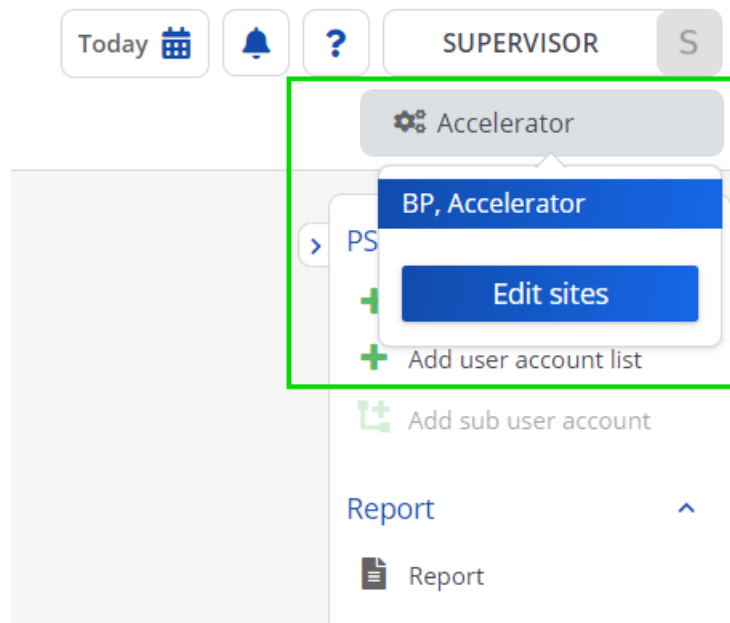
This section describes the configuration of generic Web Configuration features.

## Adding a site

The procedure to provide functionality to a specific group of users is listed here.

### Procedure

1. Click the Select site box at the top right of your screen.




2. Click the Edit sites button.
3. In the Sites dialog box, click Add on the action panel.
4. In the data section, complete the relevant fields. This table for a description of these fields:

---

Field	Description
Code	Enter a code to uniquely identify the site. The value you enter here will be part of the resulting URL.
Description*	Enter a description for the site.

Field	Description
<b>Redirect URL</b>	This is the default URL for redirecting the users after completing an action. It is possible overrule this URL by specifying a custom URL on the action of a web definition.
<b>Site URL*</b>	Enter the URL where the site is located. By default this is your root URL of the web server, for example: http://<host:port>/

5. Click Save.

 You can now continue to link user groups to the site and add / configure web definitions.

## Adding a web definition

### Procedure

1. Select the **Web Configuration** module to which you want to add a web definition.

**In Planon Accelerator, Web Configuration modules can be found on the navigation panel under the following navigation groups: ProCenter modules > Web configuration, Self-Service modules and Web client > Web client. The modules are distributed over various navigation groups depending on their use and purpose in Planon.**

2. On the action panel, click **Add**.
3. Specify a **Code** and **Description** in the data section.
4. Fill in any other (mandatory) fields.

**For more information about specific web definition fields, see the relevant field descriptions in the user documentation for that web definition. For example, a Homepage web definition has a completely different set of fields than a Reservation wizard web definition.**




5. Click **Save**.

## Configuring fields on a web definition


You can add or remove web definition fields or change the order in which they appear on a web page.



### Procedure


1. Select the module and corresponding web page for which you want to rearrange the web definition fields.
2. Expand the tree structure and select the page or block for which you want to make the changes.

3. In the data section, click the Add fields () icon.
4. Select one or more fields that you want to add and click OK. You can search for a field by its system name, name, or database name.
5. Click Save().
6. In the data section, click the Delete fields/bars () icon.
7. Select one or more fields that you want to delete and click OK.
 

**Use *SHIFT* or *CTRL* keys to select multiple fields in one go.**
8. Select the field(s) that you want to move and click the up/down/top/bottom buttons to change the order of the fields.

 The fields are displayed on the web form in the order you selected.


9. In the data section, select one or more fields that you want to copy.
10. Click the Copy selected items () icon.
11. Go to the block / web definition where you want to copy the selected fields and click the **Paste** () icon.

 • All field properties will be copied. For example, properties such as *mandatory*, *read-only*, *help texts*, *translations*, *styling & javascript*, *dynamic behavior* and so on.  
 • Before pasting, a validation is done to check if the field is available in the target destination. If any field properties of the fields are already present in the target location, they will be overwritten.

12. Click Save to apply your changes.

## Configuring icons in Self-Service modules

You can select custom icons for the web definitions you add in Self-Service modules. These icons will be displayed on the homepage, on the headers of gadgets created for these web definitions.

 For more information on the icons' file location, see **Web configuration > Uploading system images**.

### Procedure

1. Go to the Self-Service modules navigation group.
2. Select the module and the web definition for which you want to configure an icon.
3. In the Icon field, select a relevant icon for the Self-Service module.

4. Click Save.

The Self-Service web definition is displayed on the homepage with the custom icon.

## Configuring large text fields

Some text fields such as **Comments**, **Remarks** and **Question** fields can potentially contain a large amount of text. In order to keep the web page concise, text in these types of fields can be truncated.



This feature is available only for the **List block**, **Details block** and the **Expander block**.

### Procedure

1. Go to Web definitions, select a web definition, expand its hierarchical page structure, and then select a List / Details block.
2. In the data section, select the Comments field from the fields list. If the Comments field is not available, add it using the Add fields... button.
3. On the Field properties tab:

-> for a **List block**, enter a **Max. field length** value, for example, 250.

The text in the comments field on the web page is truncated to the number of characters specified in the **Max. field length**.

To view complete text, users can either visit the **Details** page or open a row expander (only in **Publisher**).

-> for a **Details block**, enter a **Min. field height** value, for example, 60.

In the **Enable expandable text**, select **Yes**, to truncate the text to the specified height. To read the entire text, a **More..** link is displayed below the truncated text. Click **Less** to return to a truncated text view.

Click **No**, to display the complete text.

4. Click Save to apply your changes.

## Using operators in search fields

You can narrow down search criteria, by configuring field operators.

Procedure

1. Go to Sites > Web definitions.

The following table lists the operators that are available per field type.

Operator	Field type		
	String / Extended string	Date- time / Date fields	Time fields
contains	x		
ends with	x		
=	x	x	x
>	x	x	x
>=	x	x	x
<	x	x	x
<=	x	x	x
does not contain or is empty	x		
does not end with or is empty	x		
<> or empty	x	x	x
does not start with or is empty	x		
starts with	x		
between		X*	



\* For Date-time / Date fields the **between** operator is a special case. The user will only be able to fill the date part of the field for both field types. The system then searches for all items from 00:00 hours on the first date field until 23:59:59 on the second date field.

## Hiding field values

To limit the number of fields on the screen you can hide information that is redundant to the user. If you are [Using macros](#) to auto-populate fields, information about the requestor is already known to the application. Instead of displaying this information on the **Service**

**request** page, you can choose to hide this information from the requestor, by setting the **Is visible** field to **No**.



This feature is available on all pages that allow user input.

### Procedure

1. Go to Sites > Web definitions.

#### Example

On the **Add block**, the **Property** field contains a macro as default value (&Person.Property). This macro renders the property of the requestor.

This is obvious information that has no added value to the user. You can hide this information by setting the **Is visible** field to **No**. Although the field is not displayed on the **Service request** page, the information will be available on the subsequent order in Planon ProCenter .

## Creating sections on a page

You can improve a form's layout, by adding bars to a page and thus creating sections. Sections help users to identify which fields belong together functionally.

This feature is available to multiple types of blocks: Add, Details, Edit.

### Procedure

1. Go to Sites > Web definitions.
2. Select a web definition and expand its structure in the details panel.
3. Select the appropriate block and in the data section click Add bar.
4. Move the position of the bar to the right location.
5. Enter a name for the bar and click Save.

The bar will appear on the web form.

## Sorting of lists

You can assign a sorting priority to the fields on a list page. This feature is available on every list block.

### Procedure

1. In Self-Service modules or ProCenter modules > Web configuration, select a relevant web definition.
2. Go to the List page > List block.

3. On the data section, go to the List fields tab and check which fields are available on this block.
4. Click the plus symbol and add more fields, as required.
5. Using the arrow buttons to set the sort order, by moving the fields up / down.

**The information on the Web Configuration form will be sorted in the order you select here.**

6. Click Save.

## Using macros to auto-populate fields on web forms

You can auto-populate data fields by using macros as default values.



This feature is available on search fields and on all pages that allow user input.

### Procedure


1. In ProCenter modules > Web configuration or Self-Service modules, select a relevant web definition. For example, Service requests.
2. On the Details panel, expand the node structure, for example at Add page > Add block and select a search field.
3. On the Field properties tab on the right, select the Default value field and enter a relevant macro.

**For example: in the Requestor field on the Add block > Default value field, enter the &PERSON macro, to default the requestor with the logged-in person.**


4. In the data section, select either of the fields from the following table.

Macro	To be used in	Displays...
	...	
&Person	Person field	The name of the person linked to the account (as reference field).
&Username	Any text field	The user name of the person linked to the account.
&UserID	Account reference field	The user name of the person linked to the account.
&Person.Property	Property field	The property of the person linked to the account.



Macro	To be used in ...	Displays...
&Person.Space	Space field	The space of the person linked to the account.
&Person.WorkSpace	Workspace field	The workspace of the person linked to the account.
		 If multiple workspaces are linked to a person, the first workspace of the person (depending on the occupancy on the reference date) is displayed.
&Person.CostCenter	Cost Center field	The cost center of the person linked to the account.
&Person.Address	Address field	The address of the person linked to the account.
&Person.Department	Department field	The department of the person linked to the account.

5. Click Save to apply your changes
6. If a user submits a service request, the fields you have configured will contain auto-populated data.

 Use these macros in the appropriate fields, otherwise the web page will display errors. Service requests are based on standard orders defined in Supporting data . Note that field values defined in the standard order overrule the macros used as default values in the service request.

## Dynamically updating the end date & time

You can configure a dynamic update of the end date & time on the search blocks of Orders, Service calls and Reservations, based on the start date & time of the search block. By default, the offset is set to one hour. If you manually change the end date, the new delta will be carried through. Example: if the default was

- Start date & time = 1/1/2016 12:00
- End date & time = 1/1/2016 13:00

and you manually change the end date & time to 14:00, a 2 hours offset will be maintained for further updates.

You can configure this feature for all **End date & time** fields in Orders (Add and Edit blocks), Reservations (Planboard casepart > Search block) and Service requests (Add and Edit blocks).

### Procedure

1. Go to Self-Service modules.
2. Select a web definition from Orders, Reservations or Service calls for which you want to configure the automatic updating of the end date & time.
3. Go to Add block, Edit block and/or Search block.
4. Select the End date & time field. If the field is not displayed, you must add it via the Add fields button.
5. On the Field properties tab, select Yes in the Relative to the start date-time? field.
6. Click the Save button.

In the relevant search blocks, the end date & time will be automatically updated when the start date & time is entered.

## Adding help text to a page

You can give end users additional information or instructions on how to use the page.

### Procedure

1. Go to Sites > Web definitions.
2. In the web definition panel, select a web definition.  
**The web definition structure appears in the details panel.**
3. Expand the web definition's node and select a page.
4. Click the Help text tab and enter the required information in the relevant language(s).



5. Click Save to apply the changes.
6. When the web page is reloaded on the browser, the Help text appears at the top of the page.

## Report an Incident

**i** You can apply basic HTML formatting to enhance the text. To include images in the Help text, apply the following format:  
``

## Adding help text to a section

You can give users additional information or instructions about how to use a section.

### Procedure

1. Go to Sites > Web definitions.
2. Select a web definition and expand its structure.
3. Select a block and - in the data section - select a bar.
4. Click the Help text tab and enter a text.
5. Click Save.
6. When the web page is reloaded on the browser, the help text appears below the section heading.

#### Information on request

**i** The coffee is not good. Please service the coffee machine.

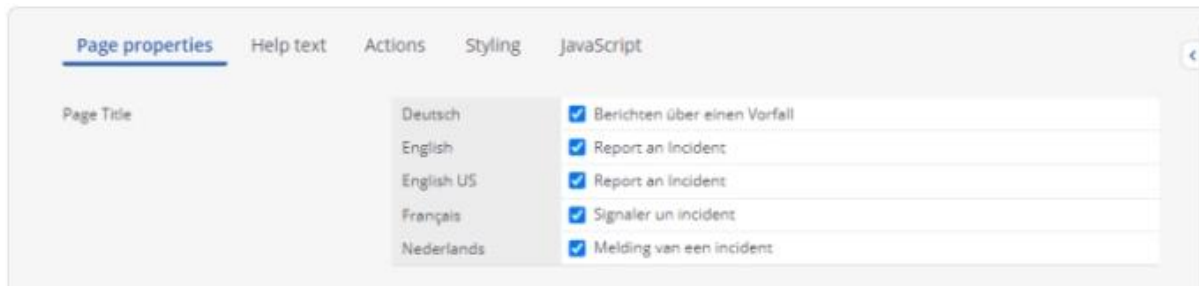
## Customizations via translations

You can enable users to customize the wording on their web definitions. This feature is available on almost every page definition for:

- Page titles
- Button names
- Field names

With this feature, you can override a default translation by specifying your own translation.

1. In the translation area, select the check box(es) of the language(s) for which you want to provide a customized translation.



2. Enter a translation text in the box.
3. Click Save and reload the web page.

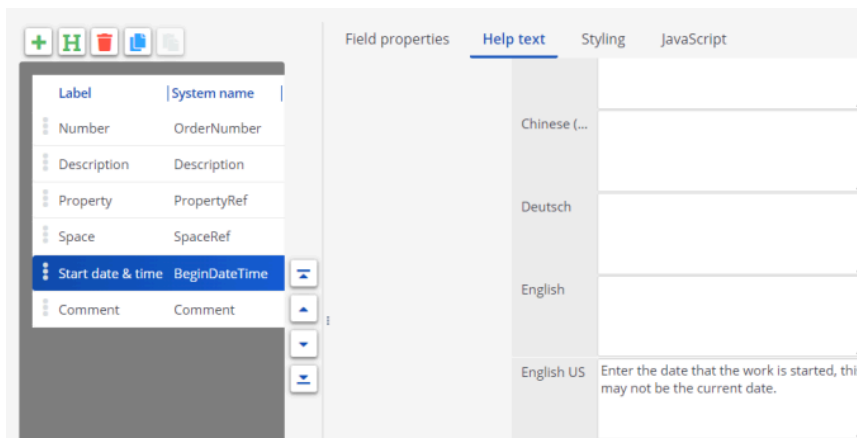
**The new translation will be visible for users using this language.**

## Specifying a hint text

You can provide context-specific help to an end user. This feature is available to fields on page blocks.

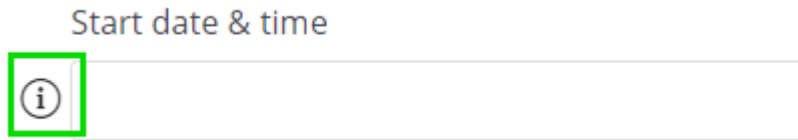
### Procedure

1. Go to Sites > Web definitions.
2. Select a web definition and expand its structure.
3. Select a block and in the data panel select a field from the grid.
4. Click the Help text tab and specify a text.

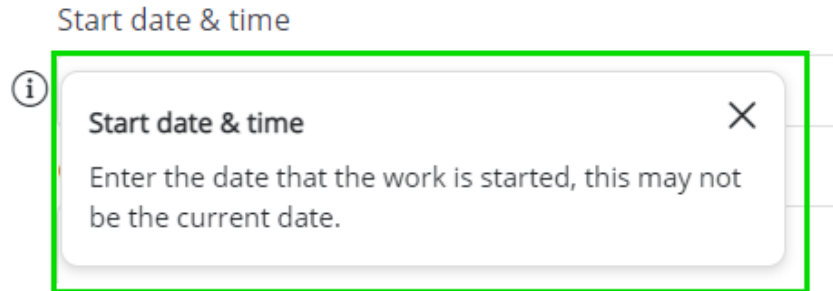


5. Click Save.

In the browser, an information icon in front of the field indicates that information about this field is available.



If the user clicks this icon, the text is displayed.




## Adding a placeholder text

You can give end users context sensitive instructions for completing a form. On the web form, the placeholder text will be displayed as “grayed out” text.

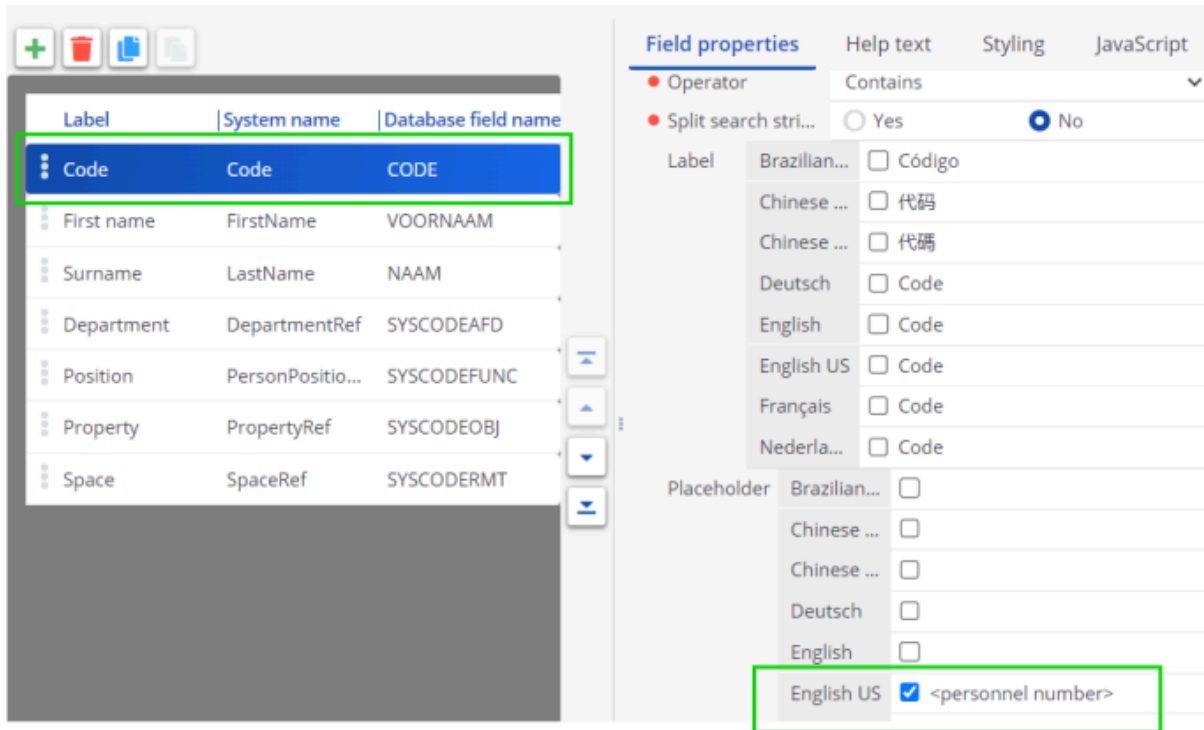
This feature is available for the following blocks, in all modules:

- Add
- Edit
- Search

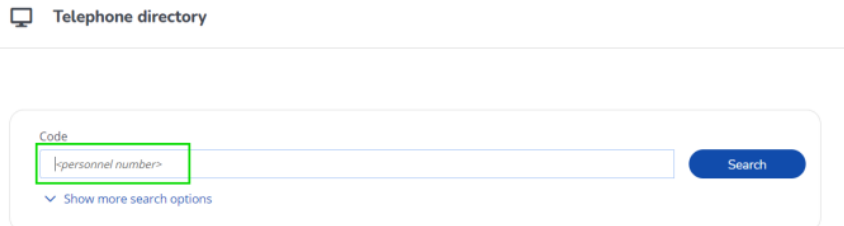
 This feature is built using the HTML5 placeholder attribute. Some browsers do not support this attribute (most notably IE9). Therefore, this feature is limited to browsers that natively support this attribute.

### Procedure

1. Go to Sites > Web definitions.
2. Select a web definition and expand its structure.
3. Select the appropriate block and in the data panel click the field for which you want to include a placeholder text.



4. Save your changes. Your placeholder text is now displayed in gray in the field where the user can enter a value.



## Uploading documents

You can allow users to attach and upload additional information to a web definition.

### Prerequisite

To enable users to upload files, you must first specify the file upload location in **System Settings > File locations > Settings for secure documents > Server upload location field**.

### Procedure

1. Go to Self-Service modules.
2. Select a service for which you want to configure the upload option.



This option is available for **Service requests, Orders, Move request, Workflow** and **Reservations** modules.

3. Select the required web definition.
4. Expand the hierarchical page structure and select the Upload block.
5. In the data panel, complete the relevant fields.

For a description of these fields, refer to [Document fields](#).



An error will be displayed if the file type in the Self-Service **Upload block** does not match the file type specified in **System Settings > Allowed File types**.

6. Click Save.



It is possible to drag and drop multiple files in the **Upload block**. You can simultaneously drag and drop a maximum of 50 files.

After uploading document(s), the name of uploaded document(s) is displayed as a hyperlink on the **Confirmation** page. Users can either view or download a document. Only secure documents can be viewed or downloaded.

You can add the **Document (secure)** field to a **List block, Details block** and **Expander block**, to display the name of the secure document as a hyperlink and allow users to view or download it.

## Making file upload mandatory

To ensure that an important step is not forgotten in the process of submitting a request, you can now make it mandatory for users to upload a file.

This greatly improves the process efficiency, because it means that users will no longer forget to upload files causing delays in process handling.

This feature is available for the following Self-Service modules (Add flow only):

- Service request
- Reservation wizard
- Move wizard
- Orders

### Procedure



This procedure applies to all of the above-mentioned modules.

1. Select your Self-Service module and go to Details panel > Add block > Upload block.
2. Here, set the **Mandatory file upload** field to **Yes**.
3. Click **Save**.

It will subsequently be mandatory for users submitting a request to include a file in order to continue submitting it.

## Adding additional SQL statements for filtering

You can add additional SQL statements for filtering content. This SQL statement can be added to a **Fixed filter** on a list block.

### Procedure

1. Select a web definition.
2. Expand its hierarchical page structure in the details panel.
3. Select List block.
4. Click the Additional SQL tab.
5. Type the additional SQL statement.
6. For example, `AND MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE CODE = '100001')`
7. Click Save.

**You have added an additional SQL statement to the fixed filter.**

## Linking web definitions to navigation groups

You can link a web definition to a navigation group, so that the web definition is displayed on the Planon navigation panel, in the relevant navigation group.

Example: you have a navigation group called **Financial Management** and want to add the **Capital projects** web definition.

1. Go to Self-Service modules to select the relevant module.
2. Select a web definition.
3. On the action panel, click **Link to navigation group**.

The **Link to navigation group** dialog box appears.

Select and move the relevant group(s) to the **In use** section.

4. Click OK.

The web definition is now displayed in the selected group(s), under its navigation name.

## Linking user groups to a web definition



You can link user groups to a web definition, in order to only allow authorized users to view this web definition.

**i** If you do not link any user groups to a web definition, users from all users groups will be able to access the web definition. By linking **at least one** user group to the web definition, you ensure that a user group must always be explicitly linked to gain access. Non-linked user groups will be denied access.

### Procedure

1. Select a web definition in Planon, on a relevant Self-Service action panel (this applies to any action panel in Planon for PSS web definitions, like for example ProCenter modules > Web configuration) .
2. On the action panel, click Link user group.

**The Link user group dialog box appears.**

3. Select and move the relevant user group(s) to the In use section.
4. Click OK.

The web definition is now only available to the selected user group(s).

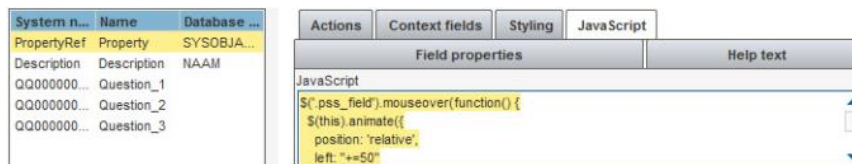
## Applying javascript

You can provide customization features to the Planon Administrator, who may enable javascript to change the way the web form is displayed.

**i** This feature is available to fields on page blocks. If you only want to clear a field value initially (first time you visit the page), it is recommended to configure the javascript on page level rather than on field level.

### Procedure

1. Go to Sites > Web definitions.
2. Select a web definition and expand its structure in the details panel.
3. Select a block and in the data panel select a field from the grid.
4. Click the Javascript tab and enter a script.



### Sample script

```
$('.pss_field').mouseover(function() {
```

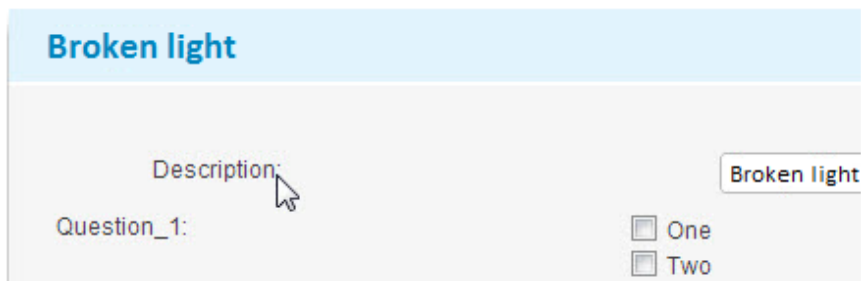
```

$(this).animate({
    position: 'relative',
    left: "+=50"
}, 1000, function() {});
});

$('.pss_field').mouseout(function() {
    $(this).animate({
        position: 'relative',
        left: "-=50"
    }, 1000, function() {});
});

```

5. Save your changes; check the result on the web form.



The form fields move horizontally on the screen when hovering your mouse over the field containing the javascript.

## Changing the styling of a web form

Web Configuration allows you to apply your own cascading style sheet (CSS) to a web form. By doing so, you can adjust its appearance to your requirements.

This section assumes that you have your own custom made CSS file, which is already published on a (web) server. You are also expected to know the exact names of the classes defined in the CSS file.

1. In Web Configuration , click on the web definition. This will show the general properties in the data section of the web definition.

In the **Stylesheet** field, enter the URL of the CSS file you want to use.

 If you leave this field blank, the web page will use the default CSS provided by Planon.

Each component in a web definition (such as a block, field, button, or hyperlink) contains a **CSS classes** field. Here, you can enter the names of the classes defined in your CSS file to apply these classes to the specific component.


2. Click Save.

## Editing CSS styling

It is possible to edit the default CSS styling and specify custom styling.

### Procedure

1. Click Select sites button on the top right of the application, below the Header.
2. Select Edit sites.  
**The Sites dialog box opens.**
3. Select the site for which you want to customize the CSS styling.
4. In the CSS field, edit the CSS for the site and all its definitions.
5. Click Save. Reload the web page to view the changes.

 Only valid CSS, compliant with W3C standards should be applied. CSS class names should all be lowercase.


## Specifying custom styling

The following example describes how you can apply your custom style to the **Description** field of a service request.

1. In the list, select the site for which you want to customize the CSS styling.
2. In the data section, in the CSS box, specify your custom CSS for the site and all its definitions.

```
CSS
.pss_header {font-color: white}
.pss_custom div.pss_field_label {color: red !important}
```

The following table provides an example of using custom CSS and its result in the browser.

 The default CSS is defined in `pss.css`, the default style sheet delivered with Web Configuration .

### Default CSS

```
.pss_field div.pss_field_label
{
  display: inline-block;
  width: 165px;
  margin-right: 15px;
  text-align: right;
  font-size: 14px;
  color: #404040;
  float: left;
}
```

Custom CSS	Result
<pre><code>.pss_field_label {   color: red; }</code></pre>	Default CSS will be used because the custom CSS is lacking "importance".
<pre><code>.pss_field_label {   color: red ! important }</code></pre>	Custom CSS will be used. <b>All</b> fields with the <code>.pss_field_label</code> class will be styled in red.
<pre><code>.pss_custom div.pss_field_label {   color: red; }</code></pre>	Custom CSS will be used, only the field <b>Description</b> will be styled in red.

3. Go to Web definitions level and select the web definition (in this example: service request).
4. Expand the node and select the Add page.
5. In the data section, select the Description field.
6. In the CSS classes field, type `pss_custom`.

System...	Name	Databa...
Propert...	Property	SYSOB...
Descrip...	Descrip...	NAAM

translation	
language	translation
English	Description
Nederlands	Omschrijving
Planon English	Description

System CSS classes	pss_field pss_fieldtype_addfield pss_fieldname_des
CSS classes	pss_custom

- Click Save to apply your changes.
- In the browser, reload the web page. The styling will only be applied to the specific element.

Light is broken


Property*:	<input type="text"/>	<a href="#">Select value</a>
Description:	<input type="text" value="Light is broken"/>	

The **Description** field displays in red.




## Uploading system images


### Prerequisite


To enable users to upload system images, you must first specify the upload location in System Settings > File locations > System images > .

 A system image is a file type that requires storage in a secure file location, because it may hold a security risk when it is uploaded. For example, SVG images that can contain JavaScript (JS). For security reasons, system images must have their own subfolder in the WebDAV location.

### Procedure

- Go to the Supporting data > System images TSI.
- On the action panel, click Add .
- In the Image field, click on the Select a file  icon to select an image from the server. To upload a new image, click on the Upload  icon. You can also drag and drop an image from your local machine in the **Upload** block or click  to remove it.

 You can only drag and drop one image at a time and only from your local machine. Only .jpg, .jpeg, .gif, .png and .svg (cannot be dragged and dropped) image formats are supported.

 By default, the uploaded image is saved in the `/systemimages/` folder in the **System images** path.

4. In the User-defined system name field, enter a name for the system image.

**In the Relative URL field, the uploaded image's name is appended to the predefined URL, for example: `/systemimages/image1`. This relative URL is bookmarkable and can be used in the Site CSS.**

5. Click Save.

The system image can be used in any customized PSS form, in both help texts and CSS. It can also be used in the Web Configuration > Web Content module and in mail merge templates. For more information on applying system images in CSS, see [Using system images in CSS](#).

## Using system images in CSS

It is possible to use system images in the CSS to customize a Self-Service form.

### Procedure

1. In Web configuration, click the Select site... button at the top right of your screen.
2. Select **Edit sites**.
3. Select the site where you want to use the system image.
4. In the site's **CSS** field, edit the CSS by using the system image's **Relative URL**.

**Example:** `.anyclassname { background-image: url("/systemimages/image1"); }`

For more information on how to create a relative URL, refer to [Uploading system images](#).

5. Click **Save**.

Refresh the web page to view the changes.

## Copying a web definition

You can reuse an existing web definition within a site by copying it.

Go to **Sites > Web definitions**, select a web definition.

### Procedure

1. In the Web definitions panel, select the web definition which is to be copied.
2. On the action panel, click Copy.

A copy of the web definition is created with a unique code and **(Copy)** as a suffix to the name of the web definition. You can change the code and the name of the web definition.

3. Make the necessary modifications in the data section and click Save to apply the changes.



The copied web definition remains linked to the same site. You cannot copy a web definition from one site to another.


The following table describes whether or not a Web Configuration web definition can be copied. It also specifies the special scenarios of copying some web definitions:

Web definition	Description
Web client	Yes
Homepage	Yes
External content	Yes
Service desk	No
Capital project management	Yes
Mobile field services	No, only one PMFS definition allowed per property set.
Space demand form	Yes
Mobile start page	Yes
Publisher	No
Service requests	Yes, as long as there is no sub selector for standard orders (added when the standard order field is used on the add or edit block).
Workflow	No
Reservations	Yes (Reservation list), No (Reservation Wizard)
Visitors	Yes
Orders	Yes
Knowledge base	Yes
Services	no
Move requests	Yes (move list), No (move request)

Web definition	Description
Selectors	Yes
Cloud Environment	Yes
Cloud Account	Yes
Cloud Exo	Yes

## Exporting a site's definition(s)

You can reuse a site's web definition(s) by sharing definitions across sites.

 Exporting web definitions is done using Configuration Transfer. See the Configuration Transfer documentation for more information.

## Importing a site's definition(s)

You can reuse a site's web definition(s) by sharing definitions across sites.

 Importing web definitions is done using Configuration Transfer. See the Configuration Transfer documentation for more information.

## Making forms dynamic

The purpose of this feature is to:

- dynamically build forms based on embedded javascript
- make forms lean and efficient
- prevent asking redundant questions

The dynamic behavior on fields is brought about by using javascript for:

- Boolean fields (Yes/No)
- Single select question fields
- Multi-select question fields

### Prerequisites

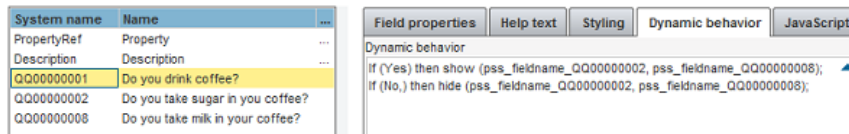
- A questionnaire must be linked and available on the **Questionnaire** tab.

### Procedure



1. Go to the web definition where you want to use the dynamic forms. For example, Service request.
2. At the bottom panel, click Add page > **Add block**.  
**The Add page details are displayed in the data section.**
3. Select the first question and click the Dynamic behavior tab.
4. Enter the following code:

```
If (Yes) then show (pss_fieldname_qq00000001, pss_fieldname_qq00000002);
If (No,) then hide (pss_fieldname_qq00000001, pss_fieldname_qq00000002);
```



5. If ([value1], [value2],....)then [show | hide | clear | hideandclear] ([fieldname1], [fieldname2], ....);  
If answer1, answer2, answerN is selected, then show/hide/clear/hide and clear fieldname1, fieldname2, fieldnameN.

This syntax is interpreted as:

“If the answer is 'No' or if no answer is given, hide QQ00000002 and QQ00000008.” Per function, you can indicate multiple elements. In the above example, the comma (,) after the answer No represents an empty answer. Alternatively, you could add a separate line per answer:

```
If (Yes) then show (pss_fieldname_qq00000001,
pss_fieldname_qq00000002);
```

```
If (No) then hide (pss_fieldname_qq00000001,
pss_fieldname_qq00000002);
```

```
If () then hide (pss_fieldname_qq00000001,
pss_fieldname_qq00000002);
```

**For questionnaires, the unique field names should be used. For Boolean fields, either use T (true) or F (false). The syntax is case-sensitive. The reference to the unique field names can be found on the Styling tab. The field name is prefixed by: pss\_fieldname\_**

**Behavior:** If the question is answered with Yes, both subsequent questions will be displayed. If the question is answered with No, Q2 and Q3 will remain hidden. If the question is answered with No, Q2 and Q3 will remain hidden.

6. Save your changes. The form has now been configured for dynamic behavior.

In your website, open the Catering request. Initially, the form will only display Q1 (since no answers are provided yet):

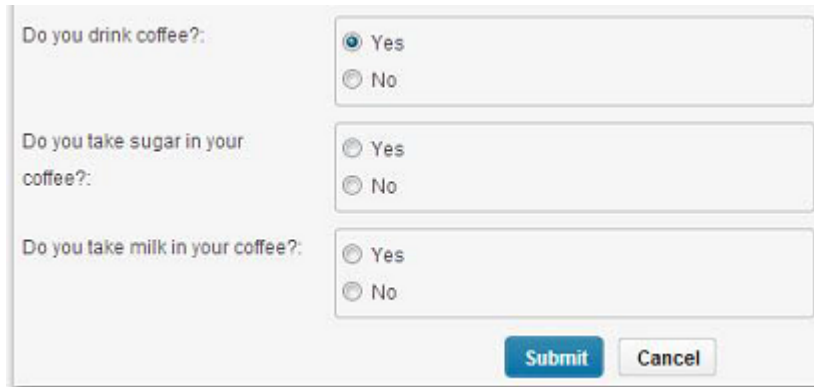


Do you drink coffee?:

Yes

No

If you click **Yes**, Q2 and Q3 will appear.



Do you drink coffee?:

Yes

No

Do you take sugar in your coffee?:

Yes

No

Do you take milk in your coffee?:

Yes

No

If you click **No**, Q2 and Q3 will remain hidden.



Do you drink coffee?:

Yes

No

### Adding comments in the script

You can add comments in the script by using `//`. Adding comments will make the script understandable. You can also disable a statement by using `//` in the beginning of the statement. In the following code snippet, first line is a comment. It provides a summary to the code snippet:

```
// if red, show X and hide Y and Z if (red) then show (pss_field_x); if (red) then hide (pss_field_y, pss_field_z);
```

In the following code snippet, the statement is disabled:

```
// if () then hide (pss_field_x, pss_field_y, pss_field_z);
```

The following functions are supported:

- **show**: Shows the element(s).

- **hide**: Hides the element (but does not clear the value of a field).
- **hideandclear**: Hides the element(s) from the form and clears the value of given field(s).
- **clear**: Clears the values for the given field(s).
- **optional**: Makes an element on the form optional. Click [Making elements optional or mandatory](#) for the procedure.
- **mandatory**: Makes an element on the form mandatory. Click [Making elements optional or mandatory](#) for the procedure.

[Making elements optional or mandatory](#)

[Dynamic behavior for multiselect fields](#)

## Making elements optional or mandatory

By using dynamic behavior properties you can determine whether to show or hide specific fields.

If required, you can make fields *optional* or *mandatory*.

### Optional / Mandatory

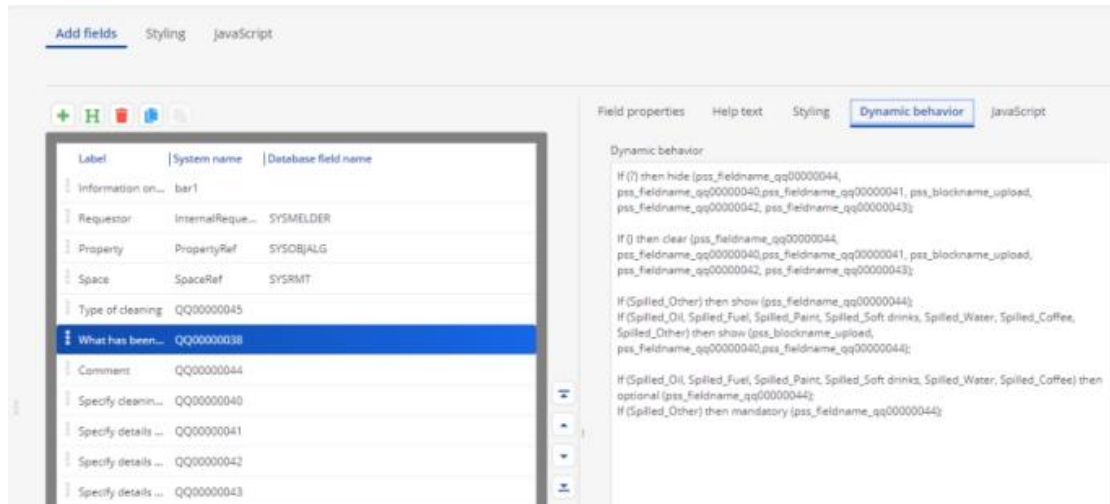
By including the function *optional* or *mandatory*, you ensure that the element becomes optional/mandatory on the form.



Please note that *optional* or *mandatory* functions:

- can only be applied to the questionnaire's **Question** fields;
- can only be applied to simple field types such as String, Integer, Boolean, Big decimal etc.;
- cannot be applied to Reference fields and File upload fields, due to technical limitations.

Example:



In the last row, it says that if you click any of the listed items except **Other**, an optional **Comment** field will be shown (QQ00000044):

What has been spilled?

- Water
- Oil / Fats
- Fuel
- Paint
- Coffee
- Soft drinks
- Other

Comment

However, if the user would click **Other**, a mandatory **Comment** field will be shown:

What has been spilled?

- Water
- Oil / Fats
- Fuel
- Paint
- Coffee
- Soft drinks
- Other

• Comment

## Making forms dynamic

### Dynamic behavior for multiselect fields

It is possible to specify multiple answer options for multi-select fields. The user can select one or all options. The user may even revert an answer on the form. Bear in mind the way javascript works:

For contrasting answers, the Show function overrides the Hide function:

```
If (Option1) then hide (pss_fieldname_qq0000002); If (Option2) then show  
(pss_fieldname_qq0000002);
```

When a user changes answer options, the script runs its logic again from top to bottom:

```
If () then hide (pss_fieldname_qq0000002, pss_fieldname_qq0000003);  
  
If (Green) then hide (pss_fieldname_qq0000002);  
  
If (Blue) then show (pss_fieldname_qq0000002);  
  
If (Blue) then hide (pss_fieldname_qq0000003);  
  
If (Green) then show (pss_fieldname_qq0000003);
```

If the user first selects Green and then Blue also:

- Field qq0000002 is hidden and field qq0000003 is shown.
- Then field qq0000002 is shown and field qq0000003 is hidden.

Subsequently, after deselecting Green, field qq0000002 is shown and field qq0000003 is hidden (nothing appears to change).



For more information, refer to [Making forms dynamic](#) .

## Questions remaining visible

A pitfall with dynamic behavior is that initially hidden questions are shown when clicking a check box and may remain visible when the check box is cleared again.

For example, a form with a multi-select question:

---

Question	Specify cleaning area
Answer options	Room Kitchen Toilets Mail room Other room

---

When "Room" is selected, another question "Specify room details" becomes visible:

---

<b>Question</b>	<b>Specify cleaning area</b>
Answer options	Room Kitchen Toilets Mail room Other room
Question	Specify room details
Answer options	A B C

---

Additionally, selecting "Kitchen" for the first question also makes a third question "Specify kitchen details" visible:

---

<b>Question</b>	<b>Specify cleaning area</b>
Answer options	Room Kitchen Toilets Mail room Other room
Question	Specify room details
Answer options	A B C
Question	Specify kitchen details
Answer options	A B C

---

Then when "Kitchen" is cleared, the question "Specify kitchen details" is expected to disappear but remains visible:

---

<b>Question</b>	<b>Specify cleaning area</b>
Answer options	Room Kitchen Toilets Mail room Other room
Question	Specify room details

Question	Specify cleaning area
Answer options	A B C
Question	Specify kitchen details
Answer options	A B C

Although this looks like an error, this is specified behavior. This pitfall is common, but it can be prevented by applying a simple rule when creating the dynamic behavior script.

The first line of the dynamic behavior script should hide all the other questions that are influenced (show or hidden) by the question at hand - If (?) then hide (...)

The question mark ? represents an empty or any answer option, and the ellipsis (...) should be replaced by all questions that are affected. This way, only one simple 'If ' statement is required to hide the questions. It can also handle future added answer options.

This line performs a 'reset'. It means: if nothing or anything is selected, then hide the affected questions. After those lines questions can be made visible again by calling the Show function. This solution prevents issues as described in this section.

### Making forms dynamic

# Configuring web definitions

This section describes the configuration of web definitions in Web Configuration .

## Web Client

The Web Client module represents an instance of the Web Client instance. The **Web Client** web definition specifies the URL for the Web Client and defines which homepage is shown.

## Creating a Web Client

### Procedure

1. On the navigation panel, go to Web client > Web client
2. On the action panel, click Add.
3. In the data section, complete the relevant fields.

For a description of these fields, refer to [Web client fields](#).

4. Click Save.

The Web Client definition is now created and appears on the web definitions panel.

## Removing Web Client buttons from the ribbon

**Precondition:** this feature is only available in Service Provider mode .



For more information on the Service Providers solution mode, see the user documentation: System Settings > General settings fields.

If required for your customer portal, you can remove the **Reference date**, **Alarms** and /or **Help** button(s) from the ribbon.

### Procedure

1. On the navigation panel, go to Web client > Web client.
2. Select the web client definition from which you want to remove buttons.
3. In the **Remove reference date button**, **Remove alarms button** and / or **Remove help button** fields, select Yes to remove the button(s) from the ribbon.



4. Click **Save**.

The button(s) are removed from the ribbon.

## Making My account settings for end users

You can enable end users to manage parts of their own user account information. End users can access the **My account** information by selecting the name of the logged-in user at the top right of their screen.

### Procedure

1. Go to Web client > Web client.
2. Select an existing web client definition or click Add on the action panel to add a new web client definition.
3. If you add a new definition, enter a Code and Description and click Save.

**A Personnel sub-web definition including a Details page and an Edit page is automatically added.**



The user groups for which the **Personnel** Web Configuration form is created, must be linked to persons. If not, the data from **Personnel** will not be displayed on the form.

On the **Details** page, you can configure:

- An **Account block**: the account details of the linked user account.
  - A **Personnel block**: the details of the linked person in **Personnel**. Click **Add fields**, to add more fields to the block.
  - An **Account settings block**: the user account settings of the linked person. Click **Add fields** to add more fields to the block.
  - A **Change password** block: the actions for the **Change password** dialog box. Cancel and Change password and log off are available by default.
4. On the Account settings edit block, configure the fields for the user account settings. Click Add fields, to add more fields to the block.
  5. Click Save.

**You have configured a Web Configuration form that end users can open to view their user account data, edit their Personnel details and change their password.**



Whether the data in this form is visible or not depends on the authorization settings of two business objects: **Personnel** and **Users**. If you want to authorize this form, you must take the fields from these two business objects into account. They may affect the accessibility of the data.



For more information on the authorization of business objects, refer to *Authorization > Specifying business object permissions*.

## Allowing users to add a new email address

To a certain extent and in compliance with regulation, users are in control of maintaining personal information that is stored in the application.

You can enable end users to add a new email address to their **My account** details.

1. Click the User accounts sub web definition that is linked to your Web client definition, to expand its details.
2. In the lower panel, on the Edit page, select the Account settings block.
3. On the Edit fields tab, make sure to add an email field.

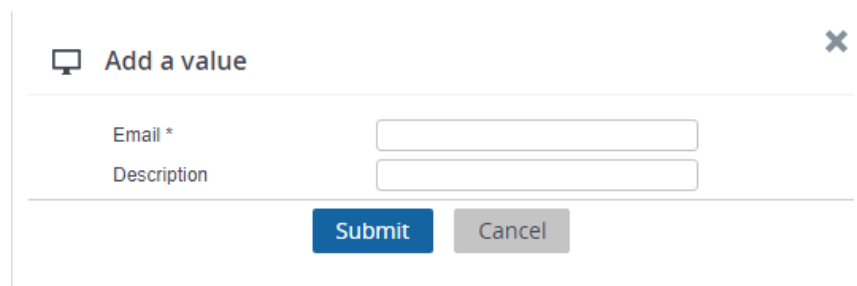
**For Account settings, the feature works for all email fields (and only there).**

4. Click Save to confirm your changes.

**Make a note of the selector that is automatically created for your User account definition. Its name is displayed on the Field properties tab.**

5. Go to Selectors and find and select the corresponding selector.
6. Set the Allow add action? and Allow edit action? fields to Yes.
7. Save your changes and log off/log on.

**When going to My Account, users will now see a plus symbol after the Email field that they can click to add a new Email and Description. These addresses will be stored in the Emails TSI (System info).**



The screenshot shows a dialog box titled "Add a value" with a close button (X) in the top right corner. Inside the dialog, there are two input fields: "Email \*" and "Description". Below the input fields are two buttons: "Submit" (in blue) and "Cancel" (in grey).

## Allowing users to choose a theme

You can enable users to choose a theme for their environment from Planon provided themes.

### Procedure

1. Go to Web configuration > Web client.
2. Click on the My account sub web definition that is linked to your **Web client** definition, to expand its details.
3. In the lower panel, on the Edit page, select the Account settings block.
4. Click on the Add fields icon.
5. In the Add fields dialog box, select the Theme field and click OK.
6. **Save** your changes.

Log off and log in again to see the **Theme** field. The **Theme** field will be available to users when they edit their **My account details**.

### My account settings

- Use 24-hour notation
  - Yes
  - No
- Contact's email address
  -
- Planon ProCenter Language
  - English US
- Displayed unit of length
  - meters
  - feet
- Autoselect first item in list
  - Yes
  - No
- Theme
  - 1, Planon Light
  - 1, Planon Light
  - 2, Planon Dark
  - 5, High contrast

## Homepage

Homepage is a Web Configuration module that enables you to create a homepage and configure it to display information from multiple sources, such as Web Configuration > Web Client or any external website on a single page. This page can be used “stand-alone” or as the homepage of the Web Client.

You can customize homepages to match user roles in an organization. For example, you can create dedicated homepages for managers and for service desk employees.

The information on the homepage is displayed in gadgets. Gadgets not only enable users to view information, but also to interact with it. Users can add, remove or rearrange gadgets as required.

## Creating a homepage

You can create a homepage to display (multiple) gadgets, either as a stand-alone page or as the Web Client homepage.

## Procedure

1. On the navigation panel, go to ProCenter modules > Web configuration > Homepage.
2. On the action panel, click Add.
3. In the data section, complete the relevant fields.

For a description of these fields, refer to [Homepage fields](#).

4. Click Save.

The homepage definition is now created and appears on the web definitions panel.

## Adding gadgets to the homepage

1. Go to ProCenter modules > Web Configuration > Homepage
2. Select a Homepage definition to which you want to add gadgets.
3. Click Gadgets and Add gadget on the Page properties tab.

Fill out the fields. See [Gadget - configuration](#), for a description of these fields.

4. Click Save.
5. The Homepage is now configured with gadgets.

## Assigning gadgets a fixed position on the homepage

You can fix the order and position of gadgets on the homepage. This will prevent end users from accidentally adding or removing any gadgets on that homepage.

### Procedure

1. Go to ProCenter modules > Web configuration > Homepage.
2. Select the Homepage for which you want to restrict the end user's access to gadgets.
3. Set the field Configurable by end user to No to impose the restriction.
4. Click Save.

The homepage will display the gadgets in a fixed position. End users cannot add or remove any gadgets.


## Adding a generic filter for gadgets on the homepage

By applying a generic filter, you can filter all gadgets on the homepage in one go by your own selected criteria.

You can configure generic filters that can be applied by end users to the gadgets on their homepage. There are two types: **Date-time** and **Selector**. The latter allows you to filter by an aspect of a business object, such as **Property**.


### Procedure

1. Go to ProCenter modules > Web Configuration > Homepage.
2. Select a homepage definition on whose gadgets you want to apply a generic filter.
3. Go to the Gadget filters tab.
4. In the Filter type field, select Selector or Date-time.
5. Complete the data fields. See Homepage fields for detailed information on these gadget filter fields.

 When choosing the **Selector** option, it is important to enter the correct selector code in the **Selector** field based on the filter criteria (field that you want to filter on) on the gadget. For example, if you want to filter the gadgets on the **Property** field, go to the **Publisher** module, select the gadget definition, in the **Search** block, copy the **Selector** value of the **Property** field and paste it in the homepage **Selector** field. This selector value must be same for all the gadgets that you want to filter on making it the common criteria.

6. Click Save.

**After refreshing the homepage, you will see a bar with a filter icon. When you click on the filter icon, you can choose specific criteria for the gadgets to be filtered on. Activate the filter by clicking OK. An active filter is marked on the homepage by an orange border. It is possible to activate multiple filters with different criteria. When hovering over the 'filter' icon on a selected gadget, a tool tip displays per gadget which filters apply.**

 This feature of showing an active filter on a gadget, does not apply to gadgets containing a **Publisher chart** for which the following **Appearance** settings are made on the **Chart** block: **Fullscreen** = **Yes** and **Show title when fullscreen** = **No**. The reason is that the 'active filter' functionality is part of the gadget title. So if the gadget title is not shown, the active filter icon is not shown either.

## Replacing the Planon logo with a custom logo

You can replace the Planon logo with a custom logo, for example your own logo. If you create dedicated web clients for your customers, you can also display their logo. You can select an existing logo from the available files or upload one.

### Procedure

1. Go to the Web Client TSI.
2. On the navigation panel, go to Web client > Web client.

3. Select the web client in which you want to replace the logo.
4. On the **General** tab, go to the **Logo** field and select an icon from the list with existing image files.
5. If you want to upload a new logo, click the **Upload** icon.
6. Click **Save**.

The Planon logo is replaced by the selected logo. An additional logo, 'Powered by Planon', will appear at the bottom of the navigation panel.



To remove an existing logo or to quit your replacement action, click the **Clear** icon. The Web Client will now display the default Planon logo.

## Self-Service modules

**Self-Service** modules enable you to configure web definitions that can be published as web forms on a homepage / portal. Using these web forms, end users can search for business information and submit reservations and requests. Self-Service web definitions can also be added to the gadget library of the home pages of relevant user groups.

In Planon Accelerator, these modules are available on the system administrator's navigation panel at **Self-Service modules**.

## Account

Account is a Web Configuration module that enables end users or account managers to create web definitions that are related to user accounts. You can add two types of web definitions here:

- The **User account list** web definition can be used to create an editable user account list on the navigation panel of application managers or people performing basic user account management.
- A **User account** web definition that is added as a sub to a **User account list**, to include a list of user accounts with personnel data.

## Configuring basic account management for application managers

You can set up and customize a **User account list** definition to enable application managers to do some basic user account management.



Preconditions:

- In **Planon ProCenter > TSIs**, the **PersonnelListLayout** has been added to the **Self-Service modules > Account > User account step**.
- the **Add sub user account** action and **Link navigation group** link are added to the **PersonnelAddEditDetails** layout.

### Procedure

1. Go to Self-Service modules > Account.
2. On the action panel, click Add user account list.
3. Enter a Code and Description for the web definition.
4. Click Save.

**A User account list definition is created.**

This is only a 'container' web definition. In order to configure a **User account list**, you must add a **Sub user account web definition**.



You can use various sub user definitions to represent user groups / departments.

5. On the action panel, click Add sub user account.
6. From the pop-up, select a personnel-related business object for which you want to have the data to be displayed on the form.
7. Click OK.
8. Enter a Code and Description for the sub web definition.
9. Click Save.

**An Add page, Details page and an Edit page are added to the sub account definition.**

On the **Add page**, specify the title, help text, and translations to be displayed on the web form. Also configure:

- the **Account block**: the account details of the linked user account.
- the **Personnel block**: the details of the linked person in **Personnel**.
- the **Account settings block**: the user account settings of the linked person.

**On the Details page, configure:**

- the **Account block**: the account details of the linked user account.
- the **Personnel block**: the details of the linked person in **Personnel**.
- the **Account settings block**: the user account settings of the linked person.
- the **Change password block**: the actions for the **Change password** dialog box. **Cancel** and **Change password and log off** are available by default.

On the **Edit page**, you can configure the fields for the user account settings. Also configure:

- the **Account block**: the account details of the linked user account.
- the **Personnel block**: the details of the linked person in **Personnel**.
- the **Account settings block**: the user account settings of the linked person.



On the on the **Add page** and **Edit page** > **Account block** > **User account groups** field , you can make settings to either include or exclude user groups from being offered for selection to the end user when adding / editing user data. This enables you to 'authorize' which user

groups can be linked to a user, without having to create authorization filters. There are two fields involved in making these settings:


- **User group filter behavior** field, select whether you want a filter based on inclusion or exclusion of user groups / users
  - In the fields **User groups to be included / excluded**, select the user groups that must either be included in or excluded from selection on the Add / Edit forms.
10. Go back to the User account list web definition and select a default reference to a sub account in the Default account reference field.
  11. Go to the User account list and select the List block, to make the necessary filter settings that determine which user groups / users will be displayed on the user account list.
  12. Select the User and user group filter behavior field and enter the filter method you want to use:
    - **Exclude** (is the default setting; selected user groups / users are not displayed)
    - **Include** (selected user groups / users will be displayed)
  13. In the fields User groups to be included / excluded and Users to be included / excluded, select the relevant user groups / users.


**User groups and users will either be displayed or not displayed on the User account web form in Planon ProCenter , according to the selected filter behavior. Example: you select the Exclude filter behavior and you select 'ADMIN' user groups and specific users, to prevent these from being viewed / added / edited by people who are only allowed to perform basic user account management. The settings work on the basis of the 'OR' principle: if persons are excluded as 'user' while none of their user groups are excluded, these persons are still hidden from display and cannot be selected.**

14. Click Save.

**You have configured a Self-Service user account list that can be opened by an account manager to view, add and edit personnel and user account data.**


To 'launch' the web definition, you have to link it to a relevant navigation group. For more information, see [Linking web definitions to navigation groups](#).

 If an account manager creates new user accounts via this user account list, the new users are automatically notified about this fact if you configure the following: create a mail merge template for the email notification and select it in the **Reset password report** field in System settings > Security.


-  • For generic information on (re)setting passwords via the Planon Web Client **Authorization** TSI, see *Authorization*
- For generic information on configuring mail merge templates, see the *Reports* user documentation.

## Working with a User account list



 Precondition: A **User account list** web definition has been configured and added to a relevant navigation group. In Planon Accelerator, a user account list with the title **Users** is published in the **Accounts** navigation group. For more information, see [Configuring basic account management for application managers](#).

The **User account list** functionality enables application managers to do some *basic user account management* in a single place. Administrators who require more extensive authorization functionalities should use the other navigation items in the **Accounts** navigation group, which may also require more extensive rights.

 For more information on working with authorization in Planon ProCenter, see the **Authorization** user documentation.

## Procedure

1. On the navigation panel, select the navigation group and navigation item where the user account list is published.

**In Planon Accelerator, you go to Accounts > Users.**

**A list of user accounts is displayed.**

2. Use the search bar to find a person by User name, Person, Department and User account group.
3. Click the Add button on the top left to add a new person.

**The fields displayed can be configured in the Details page and Edit page of the sub account created. For more information, see [Configuring basic account management for application managers](#).**

4. Click the Show inactive accounts button to view and edit the inactive users.
5. For every person, you have a set of actions that you can perform on that person. You can access these in the Show actions shortcut menu. The actions are given below:
  - **Anonymize** - You can anonymize the user.
  - **Reset password** - You can reset the user's password
  - **Reset 'forgotten password' attempts** - You can reset the number of forgotten password attempts. This option is only displayed if the reset forgotten password function is active in Authorization. For more information, see *Authorization > Clearing forgotten password attempts*.
6. Select a person. The details are displayed in the right pane.
7. Click Edit to change the person's details.
8. Make any necessary changes on the edit form.
9. Click Submit.


## CAD Viewer

With the **CAD Viewer** module you enable end users to view floor / space drawings in a Web Configuration form. It is not possible to use CAD Viewer independently in a [ph: PSS2] form. It must always be linked to a [ph: PSS2] module, such as Publisher, in which CAD drawings can be viewed.

Also see [Publisher CAD Viewer](#).


## Configuring CAD Viewer

You can configure the CAD Viewer's components and their appearance for Web Configuration modules, such as Publisher.

 In CAD Viewer, end users automatically get the option to download and print CAD Viewer drawings as PDF file. Space mapping in the floor drawings is supported. The PDF will have landscape orientation and a 'fit to page' size.

### Adding a CAD viewer web definition:

1. Go to Self-Service modules > CAD Viewer.
2. On the action panel, click Add.
3. Enter a Code and Description for the CAD Viewer.

 Configuring only one CAD viewer is supported per self-service form. Configuring more CAD viewers on one page will interfere with each other.

### A CAD Viewer definition is added.

4. Add translations for the navigation name.
5. On the various CAD Viewer text and tooltip blocks, set the **Print field labels** field to **Yes**, if you want to display the field labels in CAD Viewer. This field is only visible if fields are present on the block.
6. Fill in the other fields on the CAD Viewer blocks.
  - **CAD Viewer layout:** modify the default values according to your specifications. For field information, refer to [CAD viewer fields](#). On the **Actions > Action properties** tab, specify if you want to display the **Show constructional data** toggle button on the drawing. If you want to show the constructional data by default, just set the **Default value** field to **Yes**.
  - **Space tooltip:** configure a tooltip for spaces in the CAD drawing. If users hover their mouse over a drawing, the selected settings of space, space usage, person and inventory fields are displayed as a tooltip.
  - **Space text:** add the fields you want to show in the **Space text** block. For example, the **Space number**.
  - **Inventory tooltip:** add fields (inventory) that you want to show in the inventory tooltip. For example, **Asset**.

- **Workspace text:** add the fields you want to show in the **Workspace text** block. For example, the **Workspace number**.
- **Workspace tooltip:** add fields (workspaces) that you want to show in the workspace tooltip. For example, **Number** and **Name**.

Your **CAD Viewer** definition is complete.

## Knowledge base

Knowledge Base is a Web Configuration module that enables you to share knowledge base information via a web form. A knowledge base is a repository of frequently encountered issues, symptoms and their possible solutions.

A Knowledge base web form makes your existing knowledge base available to Web Configuration users. It contains three separate blocks:

- The **Search** block, defining the part of the page users use for searching through the knowledge base.
- Users can search by entering keywords or can browse through the knowledge base category structure.
- **Knowledge Base** will search by using the first ten keywords entered. It will ignore all keywords in the list of excluded keywords.
- The **List block**, defining the part of the page on which the list of knowledge base items is presented.
- The **Details block**, defining the page that is used for showing the information about a single knowledge base item.

### Knowledge base definition

The definition of a web page that allows end users to search for knowledge base items and read the items' details.



It is recommended to place **Knowledge Base - Category** above the **Search keywords** field, because if you type keywords in the **Search keywords** field, searching is done within the selected category.



For more information on knowledge base categories, see the *Knowledge Base* user documentation.

## Adding a Knowledge base definition

You can display knowledge base information via a browser.

### Procedure


1. Go to Self-Service modules > Knowledge base.
2. On the action panel, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Knowledge base definition.
4. Click Save.

A URL is created and your Knowledge base definition can now be further configured. For a description of the fields, refer to [Configuration knowledge base definition](#).

5. Click Save.

## Including HTML in Knowledge Base items

You can enable users to include a link to a web page or to use HTML formatting in their knowledge base items.

 This feature is available only for the **Symptoms**, **Solution**, and **Problem** fields on the **List block** and **Details block**.

### Procedure

1. Go to Self-Service modules > Knowledge base.
2. Select a web definition, followed by selecting a list block or details block
3. To enable using HTML features in your knowledge base items, select the relevant field(-s): Symptoms, Solution and/or Problem.
4. Specify the required HTML settings.

For a description of the fields, refer to [Knowledge Base - HTML fields](#).

5. Click Save to apply your changes.

## Move requests

In the **Move requests** module, you can add and edit the web definitions of the **Move request wizard** and **Move request list**. The **Move request wizard** and **Move request list** enable end users to add relocation requests for personnel and assets, via a web browser. They can also include specific items in the move request that are not registered in the Planon database.

## Move request list

A **Move request list** displays the move requests submitted by a user according to specific filtering criteria. End users can view, modify or cancel their submitted move requests. If you want to allow the editing of requests in the list via the wizard, you must link the **Move request list** to the **Move request wizard**.

## Adding a Move request list

You can add a web definition that enables end users to search and view information of a move request in a browser.

### Procedure

1. Go to Web definitions > Move Requests.
2. On the action panel, click Add Move request list.

3. In the data section, complete the relevant fields. For a description of these fields, refer to Move request list fields.
4. Click Save.

**The Move request list definition is now created and appears on the Web definitions panel.**

Continue to specify the web definition's details. For a description of the fields, refer to [Move request list - configuration](#).

5. Click Save.

**The Move request list definition is now ready for use.**

## Move request wizard


In principle, this web definition works 'out-of-the-box' and enables end users to add and edit a move request via Web Configuration . Once the wizard is added, you can further configure the various steps as required. See [Adding a Move request wizard](#) and [Move request wizard - configuration](#).

⚠ Although it is possible in the wizard to add a maximum of 100 move lines to a move request, this is not recommended for performance reasons. The **Move request wizard** is designed for relatively small moves with approximately 20 move lines. Extensive move operations are best prepared, planned and executed in Planon ProCenter > **Moves**.


The various steps on the wizard's tabs will guide users through the process of adding a move request. The wizard includes steps for adding *personnel*, *assets* and / or *special items* move lines. *Special items* are items that are not registered in the Planon database, such as personal belongings or items for which no registration is required. Users can include them in the move, by adding them on the **Move special items** tab.

The screenshot displays the 'Move request wizard' interface. At the top, there are five tabs: 'General information' (selected), 'Move persons', 'Move assets', 'Move special items', and 'Overview'. Below the tabs, the 'Description' field contains the text 'Move'. The 'Requestor' field is populated with '152 Adam Weasly' and has a dropdown arrow. A dropdown menu is open, showing a profile card for 'Department 04, ICT', 'Property 14, Columbus Square', and 'Phone number +44 (0) 2075012387'. Below this, there are three more dropdown fields: 'Internally assigned by', 'To be approved by', and 'Property' (which is currently set to '14, Columbus Square'). At the bottom of the form, there are three buttons: 'Cancel', 'Continue', and 'Done, go to overview'.

In edit mode, end users can select and edit existing move lines. Various buttons enable easy navigation through the editable move lines.

 To enable end users to select a space directly from a floor plan when they are editing, you can make settings on the list blocks of the relevant CAD Viewer space selector(s). For more information, see [Configuring space selection via CAD viewer](#).

By using the **OK and copy To space** button, you can copy the **To space** and **To property** values of a person move line to all the other person move lines created in that move request. The search options to the destination workspace is filtered by considering the context of the **To property** and / or **To space** fields.

 A move request created in the wizard is based on a standard move request. For more information on creating standard move requests, see [Standard orders](#).

## Adding a Move request wizard

You can enable end users to create move requests via a web-based wizard.


### Procedure

1. Go to Web definitions > Move Requests.
2. On the action panel, click Add Move request wizard.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Move request wizard - fields.
4. Click Save.

The **Move request wizard** definition is now added.


5. Continue to specify the web definition's details .

For a description of the fields, see [Move request wizard - configuration](#).

 In the Space selectors linked to in your **Move Requests wizard** configuration, you can specify whether inactive spaces must be displayed or not.

## Configuring a Draft status for move requests

By default, move requests created in the **Move request wizard** are directly visible to back-office staff in Planon ProCenter . Theoretically, this could cause problems if back-office staff send these move requests for approval, while the requestor is still busy editing the move request. In existing Planon configurations, you can prevent these problems by configuring a **Draft** status for move requests. By introducing this status, you will make clear to the back-office that they should refrain from action until a request is in the **Requested** status. *In Planon Accelerator, the Draft status will be pre-configured and readily available.*

 The newly configured **Draft** status and corresponding status transitions will be available both in Self-Service forms (Move request wizard) and in Planon ProCenter (back-office).



For this task, basic knowledge of configuration in Planon ProCenter is assumed. The below steps are just a rough outline of the configuration steps. For detailed information on configuration processes in Field Definer, Layouts , Web Configuration and Supporting data > Standard orders, please refer to the respective user documentation.

## Procedure

1. Go to Field definer and set the Orders business object under construction.
  2. At Business objects, select the *system* business object Move requests.
  3. At Details > Statuses, add a new user-defined Draft status.
  4. Return to Business objects and select the *user-defined* business object Move request.
  5. At Details > Status transitions, add two status transitions: from 'empty' to Draft and from Draft to Requested.
  6. At Business objects, select the user-defined business object Move request.
  7. In the data section, select the new Draft status in the Default status field and click Save.
  8. Set the Orders business object to Completed.
  9. Go to Business processes > Standard orders.
  10. In the elements list, select the standard move request that is used in the Move request wizard.
  11. In the Status field, select the Draft status as the initial status of the standard move request and click Save.
  12. Go to **Layouts** .
  13. Select the Move request business object that is used in the Move request wizard and go to the Layouts level.
  14. Set the appropriate layout under construction by clicking the padlock button.
  15. On the Status transitions panel, click the pencil button to edit.
  16. Select the status transition from Draft to Requested and drag it to the Status transitions panel.
  17. Click Save and set the layout to Completed by clicking the padlock button.
- The Draft status has been configured. The next steps are about displaying action buttons on the wizard's Overview tab.**
18. Go to Self-Service modules > Move requests.
  19. At PSS definitions, select the Move request wizard.
  20. At the lower section, select the Overview block.
  21. In the data section, select the Actions tab.

22. Select the Submit request button.
23. In the Reference to user status field, select a target status for the draft: for example Requested.
24. Set the Is visible field to Yes.
25. In the Label fields, add relevant labels for the Submit request status transition button.
26. Click Save.

#### The Draft status configuration is completed.

In addition to the **Submit request** button, the following action buttons can also be displayed on the **Overview** tab of the **Move request wizard**. To display these buttons, set their **Is visible** field to **Yes**.

- The **Save as draft** button saves the request as a draft version. It can be clicked by requestors as long as they are editing the move request. This button is commonly used in combination with the **Submit request** button.
- The **Submit request** button finalizes the request and - provided you have configured a **Draft** status - set the status to **Requested**, to inform the back-office that they can proceed.

 The **Submit request** button will not be visible if the status of the move request and the configured status of the button in the **Move request wizard** are same.

- The **OK, close wizard** button allows you to configure a workflow without a draft status. It will add a move request in the initial status of the standard order.
- The **Cancel this request** button deletes the end user's request form. None of the data entered will be retained.
- The **Print all** action button enables end users to print their move request.

 The labels of these buttons are translatable and can be modified to suit your requirements.

## Orders

Orders is a Web Configuration module that enables end users to add various orders (work orders, catering orders) and display them in a list.

Web Configuration Orders is split into two web definitions:

- Order list
- Orders

## Order definition

With an **Add work order** web definition end users are enabled to add, edit or view an order.



- An Order definition must be based on a standard order.
- End users can enter an amount/quantity of what they want to order on the order lines that are configured on the standard order.

## Adding an Order definition

Use the following procedure to enable end users to add or edit orders in a browser.

### Procedure

1. Go to Self-Service modules > Orders.
2. On the action panel, click Add work orders.
3. In the data section, complete the relevant fields. For a description of these fields, refer to [Orders - fields](#).
4. Click Save.

The Order definition is created and displayed on the Web definitions panel.

Continue to specify the web definition's details. For a description of the fields, refer to [Orders - configuration](#).

5. Click Save.

The Order definition is now ready for use.

## Order list definition

The **Add order list** definition can be used to configure a list of orders that users can use to view and edit their personal orders (e.g. My orders).

## Adding an Order list definition

Use the following procedure to enable end users to search and view orders in a browser.

### Procedure

1. Go to Self-Service modules > Orders.
2. On the action panel, click Add Order list.
3. In the data section, complete the relevant fields. For a description of these fields, refer to [Order list fields](#).
4. Click Save.

The Order list definition is created and displayed on the Web definitions panel. You can now specify the web definition's details. For more information about the fields, refer to [Order list - configuration](#).

5. Click Save.

The Order list definition is now ready for use.

## Product store

**Product store** is a Web Configuration module similar to an e-commerce site and enables users to:

- Get a complete overview of their product requisitions.
- View, search and add products from a catalog.
- Add and edit product requisitions.

## Adding a product store definition

### Procedure

1. Go to Self-Service modules > Product store.
2. On the action panel, click Add Product store.
3. Enter a Code and Description.
4. Select an Icon and an Image for the product store.
5. Select a Standard product requisition from the list.
6. Click Save.

**A Product store web definition with a Products list page, Product details page, and Add, Edit and Details pages is added.**

The following setting is available on the Product store web definition:

---

### Requisition policy tab

#### Cancel / change requisition allowed in status(es)

This setting allows users to cancel or change requisitions with a specific status. You can specify here for which statuses you want to permit cancellation or editing. If you do not enter statuses, users are not allowed to change or cancel a requisition at all.

---

## Configuring a Product details page

On the Product details > Details block, you can configure which product details and stock details are displayed.

From this page, end users can directly add products to their shopping cart and check them out to the **Requisition add page**.



### Procedure

1. Click and open the Products details page tree view.
2. On the Details block, click Add fields to add the fields you want to display on the Product details page. For example, Product size.

3. On the Stock items block, click Add fields to add more fields as required.
4. Click Save.

**The Product details page is configured.**

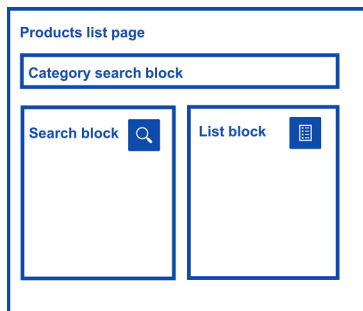
Action settings specific to the Product details page > Actions tab:

Action	Description
<b>Shopping cart</b>	 <p>This action displays the  icon on the Product details page. The shopping cart also shows the number of added items and the total price of the added products.</p> <p>If you selected <b>Yes</b> in the <b>Show price including tax / VAT</b> field on the <b>Products list page</b>, the total price displayed will include tax. If you select <b>No</b>, tax is excluded.</p>
<b>Check out</b>	<p>This action becomes available on the Products details page if at least one stock item is added to the shopping cart. On clicking <b>Check out</b> button, users are directed to the <b>Add page</b> where they can submit their requisition.</p>
<b>Back to store</b>	<p>Redirects users to the Products list page.</p>

## Configuring a Products list page

On the **Products list page**, you can configure a **Category search block**, **Search block** and **List block**.

The following illustration explains the structure of the Products list page as it is displayed to end users.



### Procedure

1. Click and open the Products list page tree view.



For information about the **Action** tab settings, refer to [Products list page-Action tab settings](#).

- On the Category search block > Main product categories field, select and add categories from the list.



You can add a maximum of seven main categories to the **Products list page** and a maximum of 3 levels for the product category structure. If you have added the main product categories, you cannot add the **Product group** search field in the **Search block**.

- In the Fixed filter field, add a filter for the product categories, if required.



For more information about how end users can search the Product list page, refer to [Searching on a Product list page](#) Searching on Products List page.

- On the Search block, add the fields based on which the user can search for products in the list. For example, Code, Description.
- On the List block, click Add fields and add the required fields that must be displayed.
- On the List fields tab, edit or add fields.
- Click Save.

**A Products list page is created.**

## Configuring the Add / Edit page

The **Add** and **Edit** pages of the **Product store** web definition have a similar structure. On the **Add / Edit** page, end users see the products that they added. This page displays the products from the shopping cart as *requisition lines*.

### Procedure

- Click and expand the Add page or Edit page tree view.
- On the Requisition lines block, click Add fields to add the fields you want to display on the requisition lines.
- On the Stock items block, click Add fields and add more fields, as required.
- On the Add block, configure the general requisition information, such as Requestor, Start date & time and End date & time.
- Click Add fields / bars to add more fields or bars.
- Click Save.

**The Add page is configured.**

Action settings specific to the Requisition lines block **Actions** tab:

Action	Description
<b>Add products</b>	Make this button available on the Add / Edit requisition lines page. On clicking this button, users

Action	Description
	will return to the Products list page where they can add more products.

## Adding a Product store list

If you add a **Product store list** page, you can configure a List page and a Details page for the end user.

### Procedure

1. On the action panel, click Add Product store list.
2. Enter Code and Description.
3. Click Save.

**The Product store list page is configured and displays the My requisitions page for the end user.**

### Configuring a Product store list page

On a Product store list page, you can configure search settings and create links to Product stores from this page.

### Procedure

1. Click the Product store list web definition.
2. In the Buttons section, click Insert button.
3. Select a Product store (button) holder from the list.
4. Click OK.

**A product store button holder is added to the Buttons section.**

5. Select the Product store button (holder) you just added and configure its action properties.
6. On the Product store ref field, link a Product store from the list. It is also possible to link an external Product store via a URL by adding a URL to the Product Store URL field.

**A product store button will now be available to users on the My Requisitions page. By clicking it, users can access the linked Product store(s).**

7. Select the Search block.
8. Click Add fields... and add the fields by which users will be able to search for requisitions.
9. On the List block, click Add fields and add the required fields.
10. Click Save.

**A Product store list page is configured.**

### Searching on a Product list page

On the **Product list** page, users can search for products in two ways:

- **Category search:** limits the product items to the selected category.
- **General search:** adds up to the selected category in the Category search block.

**Category search:**

1. A user selects a product category. Each category tab has a name and an icon representing the category. All products in the selected category and its subcategories are displayed.



The **Product store category icon** field must be added in Products > Filters > Product groups. Here, you can assign an icon to each product category. For more information, refer to *Products* in the user documentation.

The following example illustrates how the Product category search is done.

**Example:**

The product category has three levels:

- Level 1: Furniture
- Level 2: Chairs
- Level 3: Armchairs, Office chairs, Miscellaneous chairs.

If an end user is searching for a particular armchair, the armchairs from the **Furniture** level, the **Chairs** level and **Level 3** are displayed. However, no armchairs will be displayed, if one of the other Level 3 categories (Office chairs or Miscellaneous chairs) is selected.

**General search:**

All **Product catalog item** fields can be made available in the search, so that users can use it as an additional search to the category search.

A **Product group** is also available as a search field where you can search based on a specific product. This makes the search easy since you already know the product you require. The **Product group** field must be added to the 'Search block' to enable this search. For more information, see [Configuring a Products list page](#).



You can either use the **Product group** search field or **Category search** blocks but not both.

## Configuring the Product store list - Details page

On the Product store list > Details page, you can configure the Product requisition details page for requisitions that do not have a standard requisition corresponding with any linked product store.

**Procedure**

1. Click and open the Details page tree view.

2. On the Requisition lines block, click Add fields... and add the fields to be displayed for the requisition lines.
3. On the Details block, click Add fields... / bars and add the required fields / bars to be displayed for the requisition lines.
4. Click Save.

**The Product store list - Details page is configured.**

## Configuring the Details page

On the **Details page**, you can configure the **Product requisition confirmation page** and the **Details** block for the end user. The **Details** page displays the product requisition lines and their details.

### Procedure

1. Click and open the Details page tree view.
2. On the Requisition lines block, click Add fields... and add the fields to be displayed for the requisition lines.
3. On the Details block, click Add fields... / Add bar and add the required fields / bars to be displayed for the requisition lines.
4. Click Save.

**The Details page is configured.**

## Publisher

A Web Configuration module that enables you to create a report on a specific business object and configure this for display as a list on a website.

With Web Configuration Publisher you can, for example, create a company phone directory which can be made available to all staff via a site.

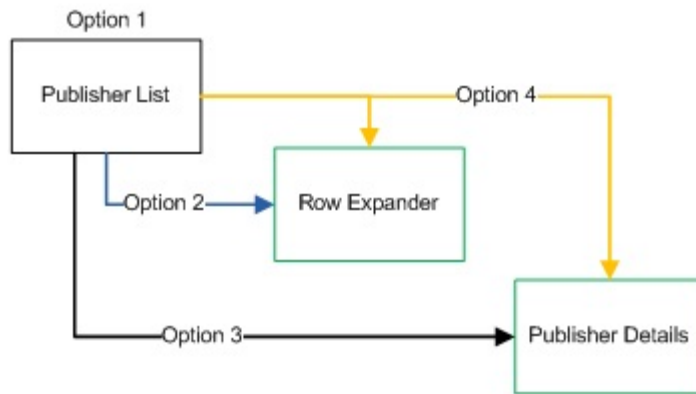
Web Configuration consists of various web form definitions which can be linked together as required.

## Publisher components

The Web Configuration > **Publisher** solution consists of the following components:

- Publisher list
- Row expander
- Publisher details
- Publisher chart

The three types of definitions shown in the image can be linked together in various combinations to provide a specific level of detail:



Example of a web form with row expander:

Code	Surname	Initials	
0000000002	Grootens	F.	1.
Surname: Grootens Initials: F.			2.
3. <a href="#">More details</a>   <a href="#">Occupancies</a>			
100001	Aalders	G.C.	4.
100004	Aarsenxx	T.B.	

A Publisher chart can be displayed as an independent unit on a website.

## Row expander

**Row expander** is a component in the Publisher infrastructure that is used to show additional details on a selected row in a list.

If configured and linked to a Publisher list, a row expander enables you to view additional details on a list item you have clicked. The results are displayed in the list itself, in an expanded list row.

Row expander should only be used to display additional information that is relevant to most users. For example, in a report on persons, the row expander is ideal to display a photo and contact information.

Do not use the row expander to display a lot of detailed information. Use the **Details** page instead.

For example, in a report on orders, you can use a row expander to display a name and description and have the rest of the detailed information displayed on the **Details** page.

If you have configured both a row expander and a **Details** page, the **More details** link is displayed on the row expander. When a user clicks the link, the **Details** page is displayed.

## Breadcrumbs



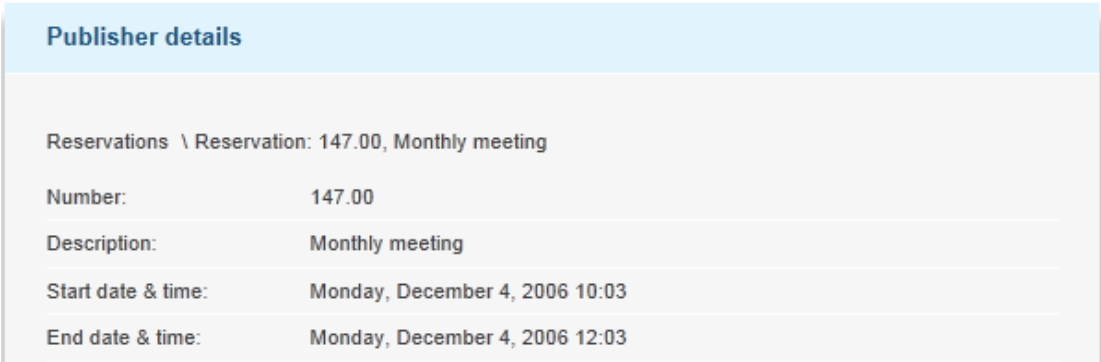
A breadcrumb trail is a navigation aid that helps you to keep track of your location while navigating pages.

You can configure breadcrumbs to display a trail of page names that users have selected to reach a particular page.

You can configure the breadcrumb text to be displayed. If no breadcrumb text is configured, the name of the page is not displayed in the breadcrumb trail. Breadcrumbs are displayed at the top left corner of the page.

You can also include a macro **[&SELECTION]** in the breadcrumbs. It will display the display value of the selected business object in the breadcrumbs.

For example, Reservation: [&SELECTION] will display *Reservation: 147.00, Monthly meeting* in the breadcrumb trail, where 147.00, Monthly meeting is the display value of the selected reservation.



The screenshot shows a light blue header with the text "Publisher details". Below the header is a breadcrumb trail: "Reservations \ Reservation: 147.00, Monthly meeting". Underneath the breadcrumb is a table with four rows of details:

Number:	147.00
Description:	Monthly meeting
Start date & time:	Monday, December 4, 2006 10:03
End date & time:	Monday, December 4, 2006 12:03

You can configure breadcrumbs for the **Publisher list** and **Publisher details** modules.

## Display document as link

Documents that are available via WebDAV will be displayed as a hyperlink so that users can click and download the documents.

The name of the document appears as a hyperlink (the path is not shown).

This works for the following files in the Documents file location ([System Settings](#)):

- Secure documents
- Document references
- Free fields of type Document

## Policy, guidance & safety notes

Dossiers | Documents



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Code	Description	Start date/time	Version	Document reference
PTW0006	Generic Asbestos Permit	7/14/2017 15:31	1.0	<a href="#">Chemical substance work permit.pdf</a>

Chemical substance work permit.pdf

This feature is available on read-only blocks:

- Details
- Confirmation
- Row expander
- Info block
- List block

## Charts

**Charts** is a Web Configuration component that enables you to create graphical data representations to be displayed in a portal or on a website.

Charts can be displayed as graphical subtypes of Publisher reports. The following types of charts are supported:

- Angular gauge
- Area
- Bar
- Candle stick
- Doughnut
- DualY
- Line
- Pie
- Radar
- Zoomline

Depending on the chart type, the following chart properties can be used:

- 2D
- 3D
- Bar horizontal
- Bar stacked

## Adding a Publisher list

The content of a Publisher report is dependent on the business object selected for the Publisher definition. For reasons of confidentiality, not all business objects are available for reporting in Publisher.

Use the following procedure to enable end users to view Publisher reports as a list in a browser:

### Procedure

1. Go to Self-Service modules > Publisher.
2. On the action panel, click Add Publisher list.
3. In the data panel, complete the necessary fields:
  - **Code**
  - **Description**
  - **Business object**
  - **Site**
  - **Auto-refresh content:** click **Yes** if you want your output content regularly updated following the refresh rate specified in **Auto-refresh time** (minimum refresh rate is 5 minutes).
4. Click Save.

A URL is created and your Publisher list is ready for use / further configuration. For a description of these fields, refer to [Publisher list - configuration](#).

## Adding a row expander


You add a row expander to enable end users to view additional details on Publisher list items without having to open a **Details** page. It can also be used to provide quick links to specific **Details** pages.



**Row expander** is only available at its parent Publisher list definition.

### Procedure

1. Go to Self-Service modules > Publisher.
2. Select a Publisher list definition and on the Publisher list tab find the Row expander field. .

Click the **Add child** button (  ) in front of the **Row expander** field.

The name of the row expander is populated automatically.

3. Click Save.

The row expander is added under the selected Publisher list definition in the web definitions panel.

4. Select the row expander.

**The code and description of the row expander are populated automatically.**

5. If required, change the code and description and click Save.

A URL is created and your row expander is ready for further configuration. For a description of the fields, refer to [Row expander - configuration](#).

6. Click Save.

Your row expander is now ready for use.

## Adding a Publisher details definition

You can enable end users to view additional details of Publisher list items.

### Procedure

1. Go to Self-Service modules > Publisher.
2. On the action panel, click Add Publisher details.
3. In the Business object definition dialog box, select the business object for which you are creating a Publisher details definition.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Publisher details - fields.
5. Click Save.

A URL is created and your **Publisher details** definition can be further configured as required. For a description of the fields, refer to [Publisher details - configuration](#).

6. Click Save.

Your details definition is ready for use.

## Charts prerequisites

**Charts** is a Publisher module. In order to display charts properly, the following steps are required.

[Adding default chart colors to site](#)

[Creating a Web client](#)

[Creating a homepage](#)

### Adding default chart colors to site

You can set the default chart colors to be used on site level. It is possible to override the default colors on web definition level.



Customers using Planon Accelerator can skip this step, as it is already configured. Continue with [Adding a chart](#).

## Procedure

1. Go to [Layouts](#) .
2. From the list of business objects, select [Sites](#) and go to the [Layouts](#) level.
3. In the element list, select [PssSite](#) and set it to [Under construction](#).
4. Click [Add fields](#).
5. In the [Unused fields](#) section, select all chart color fields and drag them to the layout panel .
6. Set the layout status back to [Completed](#).

**The chart color fields are now available to all sites. You can change the default colors as required.**

## Specifying colors for Dual-Y secondary Y-axes

Dual-Y combination charts can have a maximum of 5 secondary Y-axes.

The Y-axis can be enabled on the chart's **Appearance** tab.

The colors for these Y-axis are automatically assigned in a specific order:

- Secondary Y-axis 1 takes color 2
- Secondary Y-axis 2 takes color 3
- Secondary Y-axis 3 takes color 4
- Secondary Y-axis 4 takes color 5
- Secondary Y-axis 5 takes color 6



Color 1 is reserved for Primary Y-axis (if available).

In order to assign a unique color to each of the axis, you can specify colors 2 to 6 on the chart's **Colors** tab.

## Getting unique values

For Publisher DualY charts and queries containing X-axis sub it is important that the values for the X-axis column are unique - if this is not the case, data might not be shown.

If your query includes the **Name** of a property, and it is not unique within the set of properties, the data is shown but the chart 'behaves' unexpectedly.

You can prevent this situation by including an extra filter on property to ensure its uniqueness.

This is possible by using the **CONCAT** function, where 2 values are combined to generate a unique identifier, or by choosing a different field.

### Example

Let's assume the **Name** of properties in your set is not unique and the following query is used:

```
SELECT ADRES.NAAM as Xaxis,
ADRES.SYSCODE as Xaxiscode,
Count(ORD.SYSCODE) as YAxis,
15 as YAxis1Sec
FROM ORD
INNER JOIN ADRES on ORD.SYSADRUITV = ADRES.SYSCODE
WHERE ORD.NAAM IS NOT NULL AND ORD.STANDAARD = 'F'
AND ((1=1)
AND ( ( (ORD.BEHCODE = 'BP') AND (ORD.SYSADRUITV IS NOT NULL) ) ) )
GROUP BY ADRES.NAAM, ADRES.SYSCODE,ADRES.CODE
ORDER BY ADRES.NAAM
```

The query results in a duplicate value for the X-axis. To make the value unique, you should use **ADRES.CODE** or **CONCAT(ADRES.NAAM,ADRES.CODE)** to get unique X-axis values.

## Adding a Publisher chart

You can enable end users to view charts and support the analysis of data graphically.

### Procedure

1. Go to Self-Service modules > Publisher.
2. On the action panel, click Add Publisher chart.
3. In the Business object definition dialog box that appears, select the business object for which you are creating a Publisher chart definition.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Publisher Chart fields.
5. Click Save.

A URL is created and your chart definition can be further configured. For a description of the fields, refer to [Publisher Chart page - configuration](#).

6. After completing all fields, click Save.

Your charts are ready to be displayed. To display charts as gadgets in a portal, you must have a Web client and a Homepage configured. Subsequently, you can link your gadgets to your homepage.

## Adding a KPI chart

### Prerequisite

A KPI group is defined with contract(s) linked and threshold values defined for each contract. For all the information on adding a KPI group and threshold values, refer to *KPI charts* document.

KPI charts enable you to have informative view of the KPI results of a contract via an angular gauge chart and analyze contracts performance. Use the following procedure to add a KPI chart:

### Procedure

1. Go to Self-Service modules > Publisher.
2. On the action panel, click Add KPI chart.
3. In the data panel, enter a relevant Code and Description. Also select the appropriate KPI group. For more information on adding a KPI group, refer to *KPI charts* document.
4. Click Save.

A URL is created and your chart definition can be further configured.



In the Search fields, the **Contract** field is added by default, as this field is the primary search criteria. The field will be re-added when you remove it. Also in the Chart fields, the MsSQL query tab must contain a valid query to display the angular gauge chart and the ([&SEARCHFIELDS]) macro should always exist as a part of the query. For an example of MsSQL query, refer to [Chart examples](#).

When you click on the URL link, a Publisher chart pop-up appears. You can select a contract for which you want to see the KPI chart. Only the contracts linked in the **KPI charts groups** are displayed.

## Supported chart types in Web Configuration

The following section list the supported chart types.



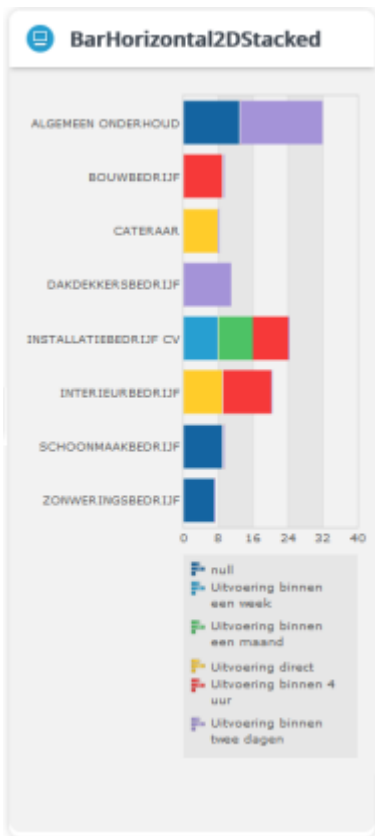
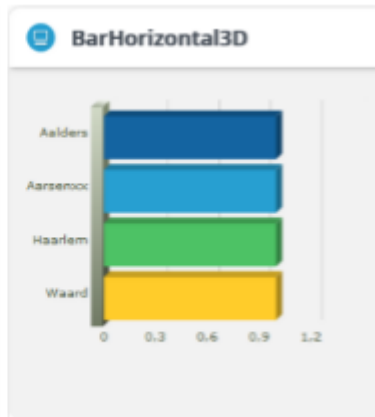
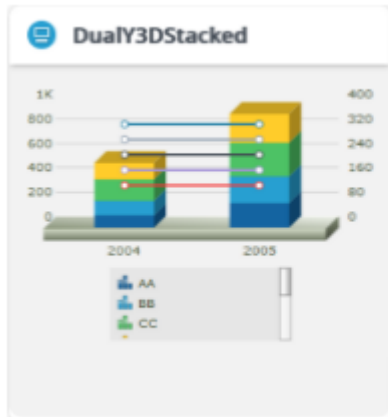
For an overview of availability of attributes per chart type, refer to [Attribute availability](#).

### Column and bar charts

Column charts and bar charts are used to compare the values of individual data points with one another. They help in bringing out the highs and lows of the data set very easily.







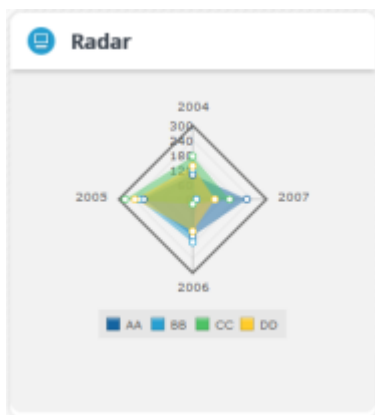
## Line and area charts

Line and area charts are used to show trends or performance over a period of time.



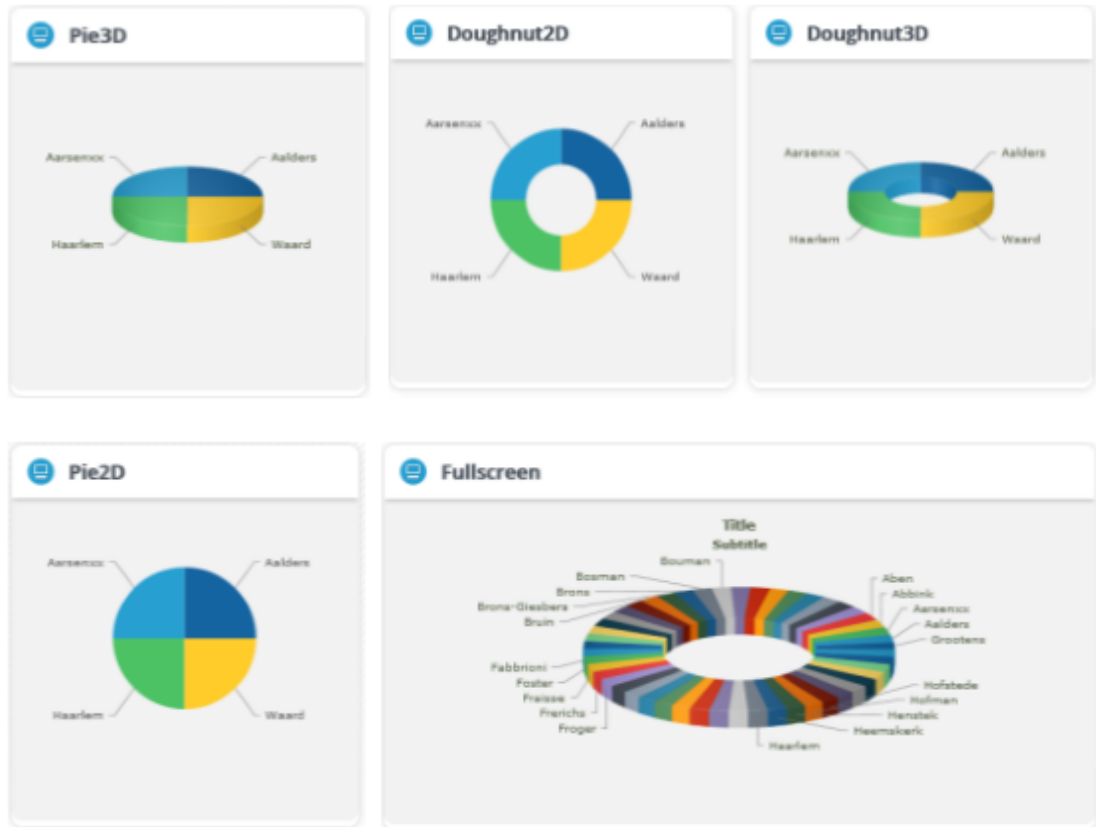
## Radar charts

A radar chart is a very effective tool for comparing multiple entities based on different characteristics. For example, they can be used for comparing various spaces based on their thermal efficiency per m2, space occupancy.



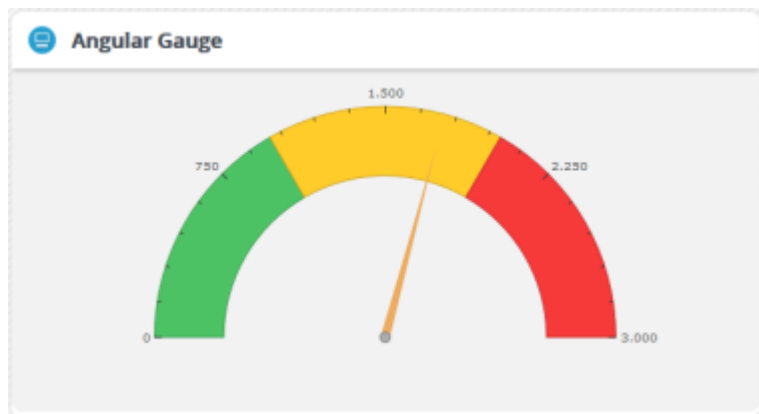
## Pie charts and doughnut charts (2D and 3D)

A pie chart is a circular chart divided into sectors, where the arc length of each sector, its central angle and its area is proportional to the quantity it represents.



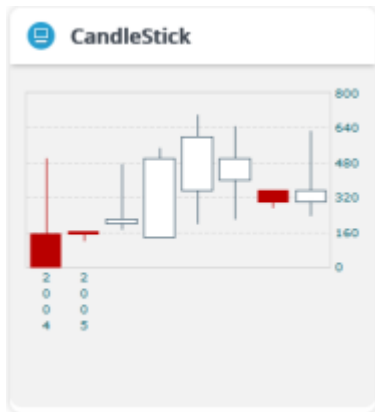
## Gauges

Gauges are value indicators that are used in dashboards, real-time monitors and reports. They are used to display Key Performance Indicators (KPIs), progress indicators and quantity indicators.



## Candlestick chart

Typically, the Candlestick chart is used for analysis of equity and commodity prices. In the ITSM domain, it could, for example, be used to show the range of open IT service calls. With a candlestick chart you can show the opening number, closing number, highest number, lowest number and the volume put together on a single chart.



## Publisher CAD Viewer

The Publisher **CAD Viewer** enables end users to view floor / space drawings in a Web Configuration form.

CAD Viewer has two blocks:

- **Search block:** enables you to configure a search page for a CAD drawing where end users can view a floor / space drawing with a specific mapping. At **Search fields**, the following search options can be made available to end users via the **Search options** tab > **Mapping** field:
  - Cost center
  - Availability
  - Department
  - Free space attributes 1 & 2
  - Space category
  - Space type
  - Space standard
  - Tariff group
- **CAD Viewer** block: displays the mapping for a specific property and floor in a CAD drawing. See [Publisher CAD Viewer fields](#) for more information on the fields. You can also configure **Details pages** for assets and spaces.

For more information on adding a CAD viewer selector, see [Adding a CAD Viewer selector](#).

## Reservations

With the Web Configuration **Reservations** module you enable end users to book reservation units, such as rooms, assets or flexible workspaces. It is also possible to include visitor registration and catering in reservations. End users can keep track of open reservations via their web browser.

### Reservation list

This web definition displays a list of reservations that were submitted by the end user. From this list, users can view, modify or cancel their reservations.

### Adding a reservation list

You can enable end users to search and view reservation information in a browser.

#### Procedure

1. Go to Self-Service modules > Reservations.
2. On the action panel, click Add Reservation list.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Reservation list fields.
4. Click Save.

The Reservation list definition is now created and displayed on the Web definitions panel.

Continue to specify the web definition's details. For a description of the fields, refer to [Reservation list details](#).

5. Click Save.

The Reservation list definition is now ready for use.

### Reservation wizard

The **Reservation wizard** web definition enables end users to quickly submit a reservation through a series of predefined steps.

The created reservations are based on standard reservations from Planon ProCenter. The wizard can be extended with additional steps for adding visitors and catering.

If you add a new **Reservation wizard** web definition, it automatically includes a **Planboard** subdefinition on the Web definitions panel.

If you select the **Reservation wizard**, you will see the **General**, **Planboard**, **Additional facilities**, **Visitors**, **Catering** and **Overview** pages displayed in a separate lower panel. Each of these pages includes one or more configurable blocks.

If you select the **Planboard** subdefinition, you will see the **Planboard** page and its blocks displayed in the lower panel.



To include catering to your reservation, the **Reservation wizard** requires the following configurations:

- Create a specific UDBO for catering orders in Field Definer > Order > Work Order.
- Link the specific UDBO created for catering orders to the **Order settings** (Field Definer > Order > Order settings > Reservations tab).
- Change the user type on the Standard catering order (use **Standard orders**) or create a new one based on the unique UDBO for catering orders.
- Link the Reservation wizard and Reservation unit(s) to the new/updated Standard catering order.

For more information, see [Reservations](#).

In the **Reservation wizard**, end users can select a room:

- from a planboard (Graphical view)
- from a list (List view (*Mobile only*))
- from a floor plan (Floor plan)

You can configure this in **Self-Service modules > Reservations** (see [Reservation wizard - configuration](#)).

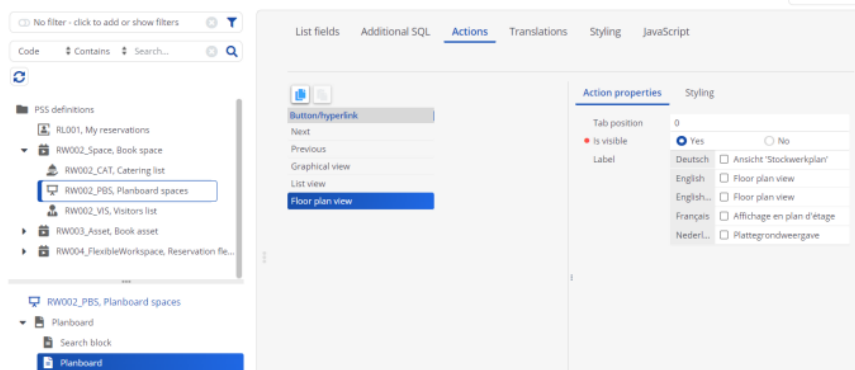
## Configuring the use of the floor plan in the Reservation wizard

Configuring using a floor plan includes some additional steps:

### Procedure

1. Go to **Self-Service modules > Reservations**.
2. Select the **Planboard spaces** web definition.
3. Select the **Planboard** block.
4. Go to the **Actions** tab.

Here you can make visibility settings (**Is visible** field, **Yes / No**) and determine the tab position of the views.



5. Go to the **List fields** tab and specify the **CAD Viewer reference** field.

The screenshot shows the 'List fields' configuration screen. On the left, a tree view under 'PSS definitions' shows 'RW002\_PBS, Planboard spaces' selected. The right pane has tabs for 'List fields', 'Additional SQL', 'Actions', 'Translations', and 'Styling'. The 'List fields' tab is active, showing a 'Fixed filter' '( (Space unit category = Meeting room) )'. A field 'CAD Viewer reference' is selected and highlighted with a green box, with its system name 'CAD\_V\_P, CAD viewer (publisher)' shown next to it. Below this, there are two red bullet points: 'Max. number of rows' set to 10 and 'Display number of results' set to 'Yes'. A table below lists fields with columns 'Label', 'System name', and 'Database field n...'. The 'Code' field is highlighted in blue. To the right, the 'Field properties' section is partially visible.

6. Select the **Search block**.

7. Make sure that the **Floor** field is available as search field.

The screenshot shows the 'Search fields' configuration screen. The left pane shows 'RW002\_PBS, Planboard spaces' selected, and the 'Search block' is highlighted in blue. The right pane has tabs for 'Search fields', 'Actions', 'Styling', and 'JavaScript'. The 'Search fields' tab is active, showing 'Search immediately' set to 'Yes'. A table below lists search fields with columns 'Label', 'System name', and 'Database field name'. The 'Floor' field is highlighted with a green box, showing 'FloorRef' as the system name and 'FK\_FLOOR' as the database field name. To the right, the 'Field properties' section is visible.

8. Go to **Self-Service modules > CAD viewer**.

9. Specify which reservation unit types end users can select in the floor plan.



**Select assets** is not supported and this option should always be set to **No**.

## CAD viewer

The screenshot shows the 'CAD Viewer' configuration interface. The left sidebar displays a tree view with 'CAD\_V\_P, CAD viewer (publisher)' selected. The main panel shows the 'CAD Viewer' configuration tab with various settings. A green box highlights the 'Select assets' option, which is set to 'No'.

Property	Value
Navigation name	Language.Description
Language	Deutsch
Language	English
Language	English US
Language	Français
Language	Nederlands
URL	https://yagiesl84-prod.plnd.cloud/case/BP/CAD_V_P
Code	CAD_V_P
Description	CAD viewer (publisher)
Business object definition	Floors
Site	BP, Accelerator
Select spaces	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select workspaces	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select assets	<input type="radio"/> Yes <input checked="" type="radio"/> No

10. Select the **CAD Viewer layout block** and specify a color in the **List highlight color** field. This color is used to show available reservation units (spaces or workspaces) in the floor plan of the Reservation wizard.

## CAD viewer

The screenshot shows the 'CAD Viewer' configuration interface. The left sidebar displays a tree view with 'CAD\_V\_P, CAD viewer (publisher)' selected. The main panel shows the 'CAD Viewer' configuration tab with various styling options. A green box highlights the 'List highlight color' field, which is set to a yellow color.

Property	Value
Width (px)	900
Height (px)	700
Partially fill orientation	Vertical
Overwrite CAD Viewer settings with sett...	<input checked="" type="radio"/> Yes <input type="radio"/> No
Legend font size	1.5
Text block font size	0.25
Title font size	1.5
Background color	[Color swatch]
Highlight color	[Color swatch]
List highlight color	[Color swatch]
Legend font color	[Color swatch]
Text block font color	[Color swatch]
Title font color	[Color swatch]

## Adding a Reservation wizard

Use the following procedure to enable end users to create reservations via a wizard.

### Procedure

1. Go to Self-Service modules > Reservations.
2. On the action panel, click Add reservation wizard.



3. In the data section, complete the relevant fields. For a description of these fields, refer to Reservation wizard fields.
4. Click Save.

The **Reservation wizard** definition and a **Planboard** subdefinition are created.

Specify the web definition's details. For a description of the fields, refer to [Reservation wizard details](#).

### *Configuring a Visitor definition*

If you want to enable users to add visitors to their reservation, or to edit / view, you must first add a **Visitors** definition to the **Reservation wizard** definition and then link the visitor.

#### **Procedure**

1. Go to the **Reservation wizard** definition.
2. In the **Visitors** field, click **Add sub** button to create and add a visitors definition. Although you can create multiple visitor definitions by clicking the **Add sub** button, only the last one is added to the **Reservation wizard** definition by default. By using **Select a value** button you can choose to change the visitors definition from the list displayed.
3. Click **Save**.
4. You can then go to the visitors definition in the tree structure, in the **Visitor** field select a visitor or visitor list by using the **Select a value** button.



The **Visitors** or **Visitors list** can be added in **Self-Service modules > Visitors**. For more information on adding a visitor, see [Visitors](#).

5. Click **Save**.
6. On the Reservation wizard's **Overview** block you can also configure a [Visitor list block](#) to summarize the visitors.
7. In order to display Visitor information for a recurring series, you can add the fields **Visitors** and/or **Parking area** to the **Repeated reservation list block**.

### *Configuring a Catering definition*

To enable users to select or add catering in the resulting web form, you must first add one or more **Order** definitions (one per type of catering order) and link it to your **Catering list** definition.

#### **Procedure**

1. Go to the **Reservation wizard** definition.
2. In the **Catering** field, click **Add sub** button to create and add a catering definition. Although you can create multiple catering definitions by clicking the **Add sub** button, only the last one is added to the **Reservation wizard** definition by default. By using **Select a value** button you can choose to change the catering definition from the list displayed.
3. Click **Save**.

4. You can then go to the catering definition in the tree structure, in the **Catering definitions for all rooms** field, browse for the catering order definition(s) that you want to add and move it / them from **Available** to **In use** and click **OK**.



The order definition for catering orders can be added in **Self-Service modules > Orders**. For more information on adding the catering definition, see [Adding an Order definition](#).

5. Click **Save**.
6. If you want to add 'room specific' catering, enter a relevant catering order definition in the **Definition for room specific catering** field.
7. On the **Overview** block of the wizard, you can also configure a **Catering list** block to summarize the catering orders.
8. In order to display catering information for recurring series, you can add the field **Catering** to the **Repeated reservation** list block.

### *Recurring reservations*

By clicking **Repeat this meeting** on the **Overview** block, end users can specify a repeat pattern. Recurrent information will be displayed on the Overview page, including any scheduling errors that may occur. This will allow users to fix issues for individual meetings.

### *Canceling reservations*

By clicking the **Cancel this meeting** button on the **Overview** block, end users can cancel a reservation.

If the reservation is recurring, a message is displayed asking if all the future reservations must be canceled. If you select **Yes**, all the future reservations from the selected reservations will be canceled.

## Selectors

A selector is a web definition that defines the 'behavior' of a reference field.

In Web Configuration , you can define selectors for various business objects.

You can manually add a selector. However, if a selector for a referenced business object is not present, it will automatically be created and added to the list of web definitions when adding a field of this type.

You can add selectors for:

- Field types such as 'pop-up' fields, 'search' fields and 'display value' fields on business objects.
- Standard orders

On a selector, you can configure the following:

- List page: configure a search block and a list block for the selector.

- Display text: configure a code, a name or any other simple field such as string, integer or big decimal as display text.



You cannot select reference fields or calculated fields as display text of a selector.

- Info block: configure fields for providing any additional information about a selected value.
- Auto-suggest: configure settings for auto-suggest results.
- CAD Viewer: configure a CAD Viewer on a details page or a row expander. A CAD Viewer can be configured on a selector for Personnel, Assets (simple) or Spaces web definitions.



By using the selector pop-up you can view, edit, add or delete selectors directly in the web definition on which they are used.

## Adding a selector

You can create a selector for a business object, for example to customize the display of reference fields of this business object.

### Procedure

1. On the navigation panel, go to Self-Service modules > Selectors.
3. On the action panel, click Add.
4. In the Business object definition dialog box, select a relevant business object and click OK.
5. On the data panel, complete the available fields for the new selector.

**For a description of these fields, refer to [Selector fields](#).**

6. Click Save.

**The selector that you have added can be referenced in a web definition. By default, the selector has a set of predefined blocks and fields. You can add or remove fields in these blocks.**



You cannot change the business object after it has been selected.

## Adding a fixed filter to a selector

You can add a filter to a selector, to only display relevant results for a business object's reference field.

A filter contains one or more selection criteria that you can use to quickly select and display a limited number of results.

For example, instead of displaying all assets, you display only the coffee machines.

### Procedure

1. Go to Self-Service modules > Selectors.

2. Choose a selector.
3. On the data panel, in the Fixed filter field, click on the Select a value icon.
4. In the Fixed filter dialog box, set relevant filter criteria. See Troubleshooting: Field is missing from a fixed filter, for information on adding fields to the filter list.
5. Click OK.
6. On the action panel, click Save.

**Users selecting this reference field on a web form, will see the filtered results, based on your selection criteria.**

## Configuring info fields

You can provide end users with additional information on reference fields, by configuring a selector.

For example, if users select a person in a reference field, you can have the photo, department or other details of this person displayed on the **Info block**. Additional information like this can help users to verify that the value that they are about to select, is correct.

### Procedure

1. On the navigation panel, go to Self-Service modules > Selectors.

**The following example shows how you can configure info fields, by using a selector on the Properties business object.**

2. Create a selector, for example on the following business objects:
  - **Properties**
  - **Spaces**
3. Click the selector for Properties, expand it and select the Info block.
4. Add the following fields:
  - **Image**
  - **Address**
  - **City**
  - **Postal code**



Currently, only the following image file type extensions are supported: JPEG, JPG, GIF, BMP, PNG.

5. Create a Service request definition and select the Add page.
6. Add the following fields:
  - **Description**
  - **Property** (the Properties selector is selected by default)
  - **Space** (the Spaces selector is selected by default)

7. Save the service request definition.
8. Open the corresponding web form and view the result.

**The info fields you added are displayed under the Property field.**

## Adding a CAD Viewer selector

You can configure a search block and a CAD Viewer block on a Publisher form.


### Procedure

1. Go to Self-Service modules > Selectors.
2. Find a relevant selector, either for personnel, spaces, workspaces or assets.
3. Click the selector.

#### **A CAD viewer block is available on the selector.**

4. In the CAD viewer web definition field, select a CAD viewer web definition.
5. In the Show inline field, select Yes to have the CAD viewer shown 'in line' on the web page itself. Select No, to have a button displayed on the field. Clicking this button will display the CAD viewer drawing.

**Only personnel / spaces / workspaces or assets that are linked to a drawing can be displayed.**


 Only one in-line CAD Viewer is allowed per Self-Service page.

## Configuring space selection via CAD Viewer

End users will not always know the number of the space they are looking for, but they may be able to recognize this space on a floor plan. To support this type of search on a web form, for example in the **Move request wizard**, you can configure the space selectors for CAD Viewer and use them in the Web Configuration forms.

### Procedure

1. Go to Self-Service modules > Selectors.
2. Select the relevant space selector.
3. Go to List block > Actions tab and select the Select from floor plan button.

 For the **Select from floor plan** action to be visible on the **List block**, make sure that the **Floor** field is added to the **Search block**.

4. At Action properties, select a relevant web definition in the CAD Viewer web definition field.
5. Set the Is visible field to Yes.
6. Click Save.

If end users open the Move request wizard to edit the space details for a person or asset, the pop-up in the Space field also displays a Floor plan view (after selecting a floor), next to the List view.

#### Select a value

The screenshot shows a search form with the following fields and values:

- Space number: 214
- Name: (empty)
- Property: 14 Columbus Square
- Floor: Second

A 'Search' button is located to the right of the Space number field. Below the fields is a link that says 'Show less search options'.



For more information on how the **Move request wizard** works, see [Move request wizard](#).

**i** Non-selectable spaces are shown with a gray overlay, for easy identification.

### Configuring workspace selection via CAD Viewer

End users will not always know the number of the workspace they are looking for, but they may be able to recognize this workspace on a floor plan. To support this type of search on a web form, for example in the **Move request wizard**, you can configure the workspace selectors for CAD Viewer and use them in the Web Configuration forms.

#### Procedure

1. Go to Self-Service modules > Selectors.
2. Select the relevant workspace selector.
3. Go to List block > Actions tab and select the Select from floor plan button.

**i** For the **Select from floor plan** action to be visible on the **List block**, make sure that the **Floor** field is added to the **Search block**.

4. At Action properties, select a relevant web definition in the CAD Viewer web definition field.
5. Set the Is visible field to Yes.
6. Click Save.

**When the end users open the Move request wizard to edit the workspace of the Move line, the pop-up in the Workspace field also displays a Floor plan view (after selecting a floor), next to the List view.**

For more information on how the **Move request wizard** works, see [Move request wizard](#).



Non-selectable workspaces are shown with a gray overlay, for easy identification.

## Configuring autosuggest

If you want to help users to find and select a value quickly, by providing a list of suggestions based on typed-in characters, you can configure *autosuggest* on fields populated by a selector.

### Procedure

1. Go to Self-Service modules > Selectors.

**The following example illustrates how you configure autosuggest by using a selector on the Properties business object.**

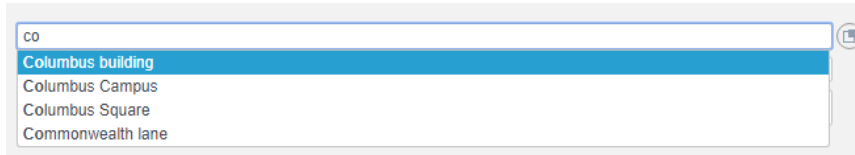
2. Create a selector on the Properties business object.
3. Go to the bottom panel displaying the web definition's structure and click the Autosuggest block.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Autosuggest fields.

**Example:**

<u>Autosuggest</u>	JavaScript
* Minimum number of characters	2
* Number of results	20
* Delay time	300

5. Click Save.
6. Create a Service request definition and select the Add page.
7. Add the following fields:

- **Description**
  - **Property** (the Properties selector is selected by default)
8. Save the service request definition.
  9. Open the corresponding web form and select some values to view the result:



## Configuring context-based filtering

Context fields are used to filter selector results, based on other field values present on the form. For example: filter spaces by a previously selected property.

### Procedure

1. On the navigation panel, go to Self-Service modules.
2. Select a module and web definition for which you want to configure context fields.
3. Select the block with the relevant reference field.
4. Select the reference field.
5. On the Context fields tab, select the field(s) to be used as an additional filter. The context field values are passed on to the selector. The selector can use these values as search fields or additional SQL.

<b>i</b>	For this to work, the search field must be available on the selector. For example, if you want to include a person's property in the <b>Person</b> selector, the search field <b>Property</b> must be available on the selector.
<b>i</b>	For more information on configuring context fields in combination with additional SQL, refer to <a href="#">Additional SQL</a> .
<b>i</b>	If the selector contains multiple search fields of the same type, only the first search field will be filled with the value of the context field. For example, if the selector contains two Property fields, only the first Property field will be taken into account. When using Context fields in additional SQL, all tags will be replaced with the value of the context field.

## Configuring the automatic completion of fields

Completion fields can be used to automatically populate other fields on a form after selecting a value in a selector. For example: a user selects a space in the **Space** field (selector) and the **Property** field is populated with the corresponding value on the form.

### Procedure

1. On the navigation panel, go to Self-Service modules.



2. Select a module and web definition for which you want to configure completion fields.
3. Select the block with the relevant reference field.
4. Select the reference field.
5. On the Completion fields tab, select the selector field(s) that should be automatically populated on the form.

If the form contains multiple fields of the same type, only the first field will be filled with the value of the completion field. It is not determined by the translated name or system name of the field. For example, if the form contains two **Property** fields, the first **Property** field on the form will be filled.

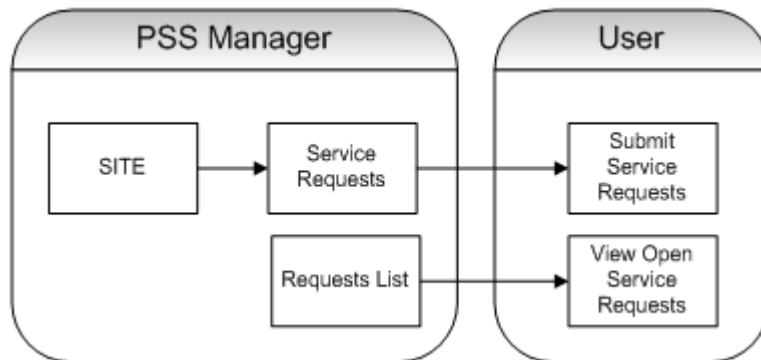


If you want to fill a specific **Property** field, make sure that you configure it as the first property field on the form.

## Service requests

**Service requests** is a Web Configuration web definition that is designed to enable end users to submit requests to a back-office.

**Service requests** enables staff to submit requests based on standard orders from Planon ProCenter via a web browser. These service requests can subsequently be processed and stored in the Planon database.



## Request list

A **Request** list displays the service requests submitted by a user according to specific filtering criteria (such as the logged-in user).

End users can view their submitted service requests.

## Adding a service request definition

You can set up and customize a service request definition to enable users to submit requests via a browser.

### Procedure

1. Go to Web definitions > Service Requests.
2. On the action panel, click Add Service request.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Service request definition.
4. Click Save.

**Your service request definition is created and appears on the Web definitions panel. You can now further specify the web definition's details. For a description of the fields, refer to [Service request - configuration fields](#).**

5. Click Save.

Your service request is now ready for use.

## Adding a request list

You can enable users to find and view the requests they have submitted. Typically, a request definition is created to provide an overview of submitted service requests for a logged on user. You can filter the results in such an overview by [Using macros to auto-populate fields on web forms](#).

### Procedure

1. Go to Web definitions > Service Requests.
2. On the action panel, click Add Service request.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Request list fields.
4. Click Save.

**Your Request list definition is created and appears on the Web definitions panel. You can now specify the definition's details. For a description of the fields, refer to [Request list - configuration](#).**

## Checking for duplicate requests

With this feature, you can prevent users from entering duplicate requests or redundant orders and you can increase the efficiency of order processing.

Duplicate requests can be checked on the basis of three different criteria:

- **Period** - if a period is specified, service requests based on the same standard order and linked to the same property, are checked for duplication in the specified period.
- **Asset** - based on asset and order status, you can define for which statuses a duplication check must be performed, if there is already a similar request (based on the same standard order) for that asset in the same property.

For example, you can decide to block a new service request if the submitted request is in the **Reported** status, since you do not want to have an issue reported twice. However, you would want to submit the call if the earlier call's

status is **Completed** or **Administratively completed** (since this suggests that the call is already fixed).

- **Space** - based on space and order status, you can define for which statuses a duplication check must be performed, if there is already a similar request (based on the same standard order) for that space in the same property. The application will check whether there is already a request with the same standard order and property for that space in specific statuses.

The procedure to check duplicate requests based on period, asset **or** space is as follows:

### Procedure

1. In Self-Service modules > Service requests, create or open a service requests definition.
2. Click the top node and click the Double requests tab.
3. In the data panel, complete the relevant fields.

**For a description of these fields, refer to [Double request fields](#).**

4. Click Save to apply your changes.

Property	Standard order	Space or Asset	Warning / Error
Green	Green	Green	Yes
Green	Green	White	Yes
Green	Green	White	Yes
Green	Green	Green	Yes
Green	Green	Red	No
Green	Green	Green	No
Red	Green	White	No
Green	Red	White	No
Green	Green	Yellow	No
Green	Green	Yellow	No
Green	Green	Green	No

**Legend**

Green = Values of new / existing request are the same.

Red = Values of new / existing request differ.

White = Values are the same (no value in both the old / new request).

Yellow = Values differ (existing request has no value, new request contains a value).

If an end user submits a service request that only meets green and / or white criteria, a warning or an error will be displayed.

## Import from Planon Self-Service 1


By using the **Import from Planon Self-Service 1** action, you can migrate PSS1 Service Call definitions to Web Configuration Service Requests.

The **Import from PSS1** action allows users to import multiple PSS1 Service Call definitions into Web Configuration .

The import tries to convert all the settings possible. If an item cannot be imported or if there are any items of PSS1 that are not in Web Configuration , it is logged in the **Comment** field of the new Web Configuration definition.

If a form is imported multiple times, the code of the web definition is postfixed with a number starting from 1. The length of the PSS1 code field and Web Configuration code field are 50 and 100 characters respectively.

The code of the web definition will be similar to - PSS1\_(Name of the pss1 form), example: PSS1\_ACunitblowingcoldair.

-  If there are any special characters in the PSS1 code, they will be removed to prevent crashes.
- The description of the web definition is same as the name of the PSS1 form.

## Importing service call definitions from Planon Self-Service 1

### Procedure

- Go to **Web definitions > Service Requests**.
- On the action panel, click **Import from Planon Self-Service 1**.
- Select one or more definitions to import and click **OK**.

**All the selected PSS1 definitions will now be imported into Web Configuration .**

## Linking questionnaires

You can provide response options on the web definition for service requests, to enable users to provide answers to questions specified by the Planon administrator.

### Procedure

- Go to Web definitions > Service Requests.
- On the action panel, click Add Service request.
- Create or open a Service requests definition.
- Select the Service Request node and click the Questionnaire tab.
- Specify whether you want to use the questionnaire that belongs to the linked standard request.
- You can also add another questionnaire (defined in Questionnaire Manager) to the service request definition, either as an addition or as an alternative. For a description of the fields, refer to Questionnaire fields.
- Click Save to apply your changes.



Do not delete or unlink questions in Questionnaire Manager. If you want to remove a question in Questionnaire Manager, you must first unlink it in Web Configuration .

## Linking standard orders

You can link a default standard order or - if required - multiple additional standard orders to a web definition (service request). The functionality of adding multiple, additional standard orders to a web definition will save you the trouble of having to configure a web definition for every individual standard order.



- For the Web Client's **Service Desk** it is necessary that each web definition refers to a standard order. This ensures that the standard orders are shown on the **Add panel** and enables service desk employees to create the actual service requests.
- If you add the **Standard order** field to the **Add block** or **Edit block** of your **Service request** definition, a special selector is automatically added to the web definition. For more information on the functionality of this special selector, see [Service request - configuration fields](#).

### Procedure

1. Go to Web definitions > Service Requests.
2. On the action panel, click Add Service request.
3. On the Service calls step select a service call for which you want to link the standard orders.
4. On the Service Request node, complete the relevant fields in the data section. For a description of these fields, refer to Service request definition.

The conditions that apply when linking additional standard orders are:

- The user-defined type of the additional standard requests must be identical to the default standard request.
  - The questionnaires linked to the additional standard requests must also be identical.
5. Click Save.

## Services

The Web Configuration **Services** module enables you to display popular services together on the home page, either in list form or as a graphic. Users can quickly access the respective **Services** web forms to find information or submit their requests for a service.

Examples of services: **Reservation wizard**, **Service requests**, **Reservations list** etc.

The **Services** web definition's **List page** consists of the preconfigured blocks **Standard order**, **Search** and **List block**, which are ready for use. You can, however, customize these blocks as required.

## Adding a web definition in Services

Use the following procedure to add and customize a **Service list** web definition.

### Procedure

1. Go to Self-Service modules > Services.
2. On the action panel, click Add.
3. In the data section, enter a Code, Description and, optionally, select an Icon.
4. In the Filter mechanism field, select the type of filtering method that best suits your configuration purposes:
  - **Basic** - select each individual service that you want to display.
  - **Advanced** - displays all services initially. Apply a filter method to narrow down the number of services on display.
5. If you selected Advanced, create a filter in the Advanced filter field, to only display the relevant services in the gadget.
6. Click Save.

**You have now configured a Services list that can be displayed in a gadget. The default is a list form, but you can also display the Services gadget with graphics. See [Configuring graphics for the Services gadget](#), for more information.**

## Configuring graphics for the Services gadget

You can select custom images for the Self-Service forms that are linked to a **Services** gadget on your homepage. To enable the display of these graphics on the **Services** gadget, use the following procedure.

### Procedure


1. Go to Services > List block
2. In the Layout field, select the Image option.
3. In the Image sizing field, adjust the image size by selecting either Stretched or Keep aspect ratio.
4. If you want to display a border around the image, enter a relevant number between 0 to 100 in the Image border(px) field.



Although the **Image** field is displayed for all services, the option on the layout can only be selected in the **Services** module.

5. Make sure that each web definition in the Services gadget has an image linked.
6. On the navigation panel, go to Self-Service modules.
7. Select a web definition for which you want to configure the image.
8. In the Image field, select a relevant image for the web definition.

9. Click Save.
10. Link an image to each web definition in the Services gadget.

 For the file location of images and additional information, see [Web configuration > Uploading system images](#).


The **Services** gadget displays the services with the selected images.

## Visitors

A Web Configuration module that enables end users to add visitors visiting an organization.

It enables reception desk employees to add and maintain the information of a list of visitors visiting an organization. They can specify the visitors' details such as planned visit date, the person to meet, and the expected arrival time. Based on the expected arrival time, the expected time of departure is automatically calculated and filled-in. If the visitor(s) directly show up at the reception, the reception desk employee can add the visitor and change the status to **Arrived** at the same time. The status of the visitor can also be modified to **Arrived**, **Departed**, or **Canceled** in the visitor list or in the visitor details page. For more information, see [Visitor - configuration fields](#).

It is also possible to configure the reservation of parking spaces for the visitor (if available and defined in Supporting data ).

 It is possible to speed-add the details of a group of visitors. With this feature, a reception desk employee can add the details of multiple visitors in one go. This can be done by entering the names of all the visitors separated by commas in the visitor's **Name** field. The reception desk employee can also copy / paste a list. However, you cannot specify parking spaces for visitors registered via speed-add.

## Visitor list

This Web Configuration web definition enables you to create a visitors list.

The list can be used by reception desk employees to quickly search visitors and update their information.

## Adding a visitor list

You can allow the end user to view a list of all visitors or search for a specific visitor. If users click on a search result, the **Details** page of the visitor opens. They can then update the status of the visitor to either **Arrived** or **Departed**. If a visitor does not show up, the status can be changed to **Canceled** by clicking **Delete**.

Users can also modify the visitor information by clicking **Edit**.

Use the following procedure to configure a visitors list and to enable end users to search / view visitor information in their browser.

### Procedure

1. Go to Sites > Web definitions > Visitors.



2. On the action panel, click Add visitor list.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Visitor list fields.
4. Click Save.

The visitor list definition is created and displayed on the Web definitions panel. You can now specify the web definition's details. For a description of the fields, refer to [Visitor list - configuration](#).

5. Click Save.

The visitor list definition is now ready for use.

## Adding a visitor

You can set up and customize a **Add visitors** definition to enable users to add a visitor via a browser.

### Procedure

1. Go to Sites > Web definitions > Visitors.
2. On the action panel, click Add visitors.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Visitor fields.
4. Click Save.

The visitor definition is created and displayed on the Web definitions panel. You can now specify the web definition's details. For a description of the fields, refer to [Configuration visitor fields](#).

5. Click Save.

The visitor definition is now ready for use.

## Adding a car park

You can add the following fields to the web form to allowing the reception desk employee to reserve a car park for a visitor:

- Property
- Start time parking
- End time parking
- Parking spaces
- Car park



Car parks are defined in **Web Configuration > Car parks**.

The following fields must be filled in for reserving a car park:

- Parking spaces
- Property
- Either Expected arrival/departure time or parking begin/end time

If these fields are configured, the reception desk employee can select the **Car park** check box. The **Car park** box is populated automatically with the first available car park. You can also choose a different car park from the list in the selection pop-up. The pop-up displays available parking areas sorted based on the search scope. The columns displayed in the pop-up can be configured in the **Parking area utilization** block. For more information, see [Visitor - configuration fields](#).

The selection of car parks is sorted based on the following criteria:

- Availability of requested parking spaces
- Priority of the car park
- Distance to the property
- Most available space



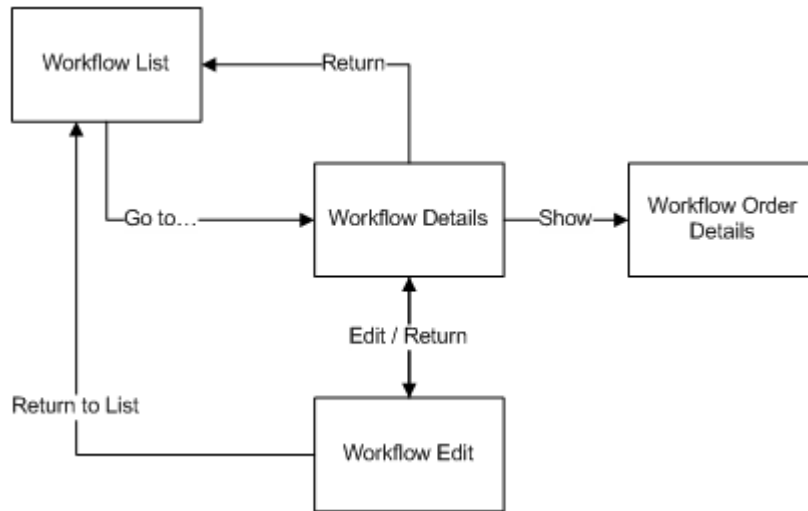
Car park details cannot be specified for the group of visitors registered via the **Speed add** feature.

## Workflow

The Web Configuration **Workflow** module allows you to specify a particular workflow for work orders. On the website, Web Configuration end users (such as internal tradespeople) can modify the status of their work orders.

In Web Configuration , the various roles in a workflow can be represented by separate web definitions. 'Internal tradesperson' is an example of such a role. Per workflow definition, various status transitions can be arranged, allowing the transition from one particular work order status to another.

Workflow consists of various web form definitions which can be linked together to reflect your process:



## Workflow list

**Workflow list** is a web definition that provides end users direct access to the orders assigned to them.

A workflow list is the initial entry point for end users who access their pending orders via a browser. Workflow can be configured for various cases, for example:

- managers approving leave requests
- purchase managers granting purchase requests
- maintenance engineers checking and acting on their maintenance orders

In a workflow list, you can add, edit and delete labor hours. Labor hours can be configured in two ways for end users:

- by enforcing the addition of labor hours to an order and thus make them mandatory.
- by preventing end-users to edit or delete existing labor hours.

### Adding a Workflow list

You can enable end users to view and modify their pending orders in a browser.



A **Workflow list** definition is based on the **Orders** business object.

### Procedure

1. Go to Self-Service modules > Workflow.
2. On the action panel, click Add workflow list.
3. Click the Workflow List node.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Workflow list fields.
5. Click Save.

**Your Workflow list definition is created. You can now specify the workflow list details. For a description of the fields, refer to [Workflow list - configuration](#).**

6. Click Save.

**Your Workflow list definition is now ready for use.**

### Adding Workflow details

You can enable end users to view the details of their assigned orders in a browser.



The Workflow details definition is only available on its parent Workflow list definition.

#### Procedure

1. Go to Self-Service modules > Workflow.
2. Select a Workflow list definition from the Web definitions panel.
3. On the action panel, click Add child - Workflow details.
4. The Business object definition dialog box appears.

The details are specified per user order type. Select the user order type that is relevant to this definition and click **OK**.

5. On the data panel, complete the relevant fields. For a description of these fields, refer to Workflow details fields.
6. Click Save.

**Your Workflow details definition can now be configured. For a description of the fields, refer to [Workflow details - configuration](#).**

7. Click Save.

The **Workflow details** definition is added to the selected Workflow list definition on the web definitions panel.

A URL is created. Your workflow details definition is now ready for use.

### Adding a Workflow edit definition

You can enable end users to edit the details of their assigned orders in a browser. You can, for example, allow maintenance engineers to update and save information about an order.

#### Procedure

1. Go to Self-Service modules Workflow.
2. On the action panel, click Add Workflow edit.

The **Business object definition** dialog box appears.

3. Select the relevant user order type for this definition.
4. Click OK.

5. In the data section, complete the relevant fields. For a description of these fields, refer to [Workflow edit fields](#).
6. Click Save.

A URL is created. Your **Workflow edit** definition is ready for further configuration. For a description of the fields, refer to [Workflow edit - configuration](#).

7. Click Save.

**Your Workflow edit definition is now ready for use.**

## Adding Workflow order details

You can make details of an order available to end users after they click an order in the list. The order details are displayed embedded in the **Workflow details** definition.



The information that is displayed through the Workflow order details is read-only.

1. Go to Self-Service modules > Workflow.
2. On the action panel, click Add Workflow order details.
3. Select the business object for which you want to display details and click OK.

**The Workflow order details definition appears in the list.**

4. On the data panel, complete the relevant fields. For a description of these fields, refer to [Workflow order details fields](#).
5. Click Save.

A URL is created. Your **Workflow order details** definition can be linked to a **Workflow details** definition. For a description of the fields, refer to [Workflow order details - configuration](#).



To display the Workflow order details in the browser, it must be linked to the Workflow details definition.


## Adding labor hours to a workflow

You can make labor hour information mandatory on saving / submitting an order:

1. Go to Self-Service modules > Workflow list.
2. Select the workflow list to whose details you want to add mandatory labor hour information.
3. On the action panel, click AddChild workflow details.
4. From the Business object definition dialog box, select a business object. For example, Order.
5. Click OK.
6. Enter a Code and Description for the subworkflow.

7. In the Blocks section, click Add sub details blocks ....
8. From the dialog box, select Labor hours.

**The Labor hours option is added to Blocks.**

9. On the Block properties tab, in the Workflow order details definition field, click the  icon.

**On the left panel, the Subdetails block is updated with the new Workflow order details for labor hours.**

10. On the left panel, expand the Workflow order details Labor hours. The Workflow order details AED is displayed.
11. Select the Workflow order details AED definition, to configure the mandatory labor hour settings.
12. On the Order details - add / edit tab, enter the relevant data.

**For the field descriptions, see [Workflow - Labor hour settings](#).**

### Allowing direct link to the workflow details page


A link to jump directly to the workflow details page of the selected order.

#### Procedure


1. Go to Self-Service modules > Workflow.
2. Select the required workflow definition.
3. On the Workflow list tab, enable the option Allow direct link to details page.

 For more information on the field, see [Workflow list fields](#).

4. Go to the Details page > Actions tab, the Direct link option is set to Visible.

 You can make it invisible, if you do not want to see the direct link button on the details page. For more information on the option, see [Workflow details fields](#).

5. Go to the workflow list, click the URL link and select an order.

**On the top right of your details page you will see an action button . When you click this button, it will provide the direct link to the details page of the selected order. The link can be copied to the clipboard and shared with others who have appropriate access.**

The direct link can also be included in a mail-merge form by using an expression in the report. The URL must have the following components:

```
"<Self-Service link>?&action=InitialDirectLinkAction&PK=<System code>&BT=UserOrderType
```

URL example:

https://customer-prod.cloud.com/case/CU/WFL1?  
&action=InitialDirectLinkAction&PK=553&BT=UsrOrder

Expression example:

```
"<replace by custom workflow list URL>" + "?&action=InitialDirectLinkAction&PK=" +  
formatNumeric(Orders.'System code', "#####") + "&BT=" + Orders.Type.'System  
name'
```

## Web configuration

**Web configuration** enables you to configure *ProCenter* web definitions and dashboards, based on Planon's Web Configuration technology.

Configured web definitions can be added as task specific interfaces (TSIs) to the navigation panels of relevant user groups. Dashboards can be published (as gadgets) on a homepage. In addition, there are web definitions that can be used to configure your own **Web content** or make links to **External content**.

In Planon Accelerator, **Web configuration** is available on the system administrator's navigation panel at ProCenter modules > Web configuration. The web definitions are categorized on various steps / tabs, where you can add and edit them.

Examples of configurable web definitions / dashboards: **Service desk**, **Capital projects**, **Agile Workplace and space management**, **REM dashboards**, **SUS dashboards** and many more.



- For information on Cloud dashboards and Environment management, refer to the *Cloud Services* user documentation.
- For information on configuring status flows refer to the *Status flows* user documentation.
- For Web client and Home page configuration, refer to [Web Client](#) and [Homepage](#).

## External content

With the Web Configuration **External content** module you can create a web definition to display information from external sources on the [homepage](#).

End users can add this defined external content as required. They can, for example, add approved news, weather or traffic sites as gadgets to their [homepage](#).



External content definitions link to external websites via their URLs. Check your company's external web site policy to determine whether the content can be displayed in a gadget.

## Defining external content

Use the following procedure to define external content for the [homepage](#).

## Procedure

1. Go to ProCenter modules > Web configuration > External content.
2. On the action panel, click Add.
3. On the data panel, complete the relevant fields.

For a description of these fields, refer to [External content fields](#).

4. Click Save.

**The external content is now available to be linked to a gadget.**

## Space demand form

The Web Configuration **Space demand form** module enables you to create a web form for Strategic Space Planning (SSP).

The Space demand form can be used by business unit managers to enter information such as fixed and flexible headcounts for SSP demand records.

## Configuring a space demand form

Use the following procedure to configure a **Space demand form**.

### Procedure

1. ProCenter modules > Web configuration > Space demand form.
2. On the action panel, click Add.
3. On the data panel, complete the relevant fields.

**For a description of these fields, see [Space demand form fields](#).**

4. Click Save.
5. Select the Space demand form and Thank you form web definitions to provide translations for labels, actions etc.
6. Save your changes.

**The Space demand form is now configured and ready for use.**

## Mobile start page

**Mobile start page** is a Web Configuration module that enables you to create a start page for a mobile phone.

You can configure the start page to display information on a mobile screen from Web Configuration or any external website.

## Creating a mobile start page



You can create a homepage for a mobile phone that displays information from Web Configuration or any external website.

### Procedure

1. Go to ProCenter modules > Web configuration.
2. Select the Mobile Start Page selection step.

**If this selection step is not available yet, add it to the TSI, or ask the responsible application manager to do it for you.**

3. On the action panel, click Add.
4. In the data section, complete the relevant fields.

For a description of these fields, refer to [Mobile homepage fields](#).

Click **Save**.

The **Mobile homepage** definition is now created and displayed on the web definitions panel.

End users can access the mobile home page by entering the URL in their mobile phone's browser in the format: ***http(s)://host:port/mobilestartdemo/<sitename>/<casepartname>***

## Service Desk

**Service desk** is a Planon ProCenter Web Client module that can be added to a Web Client site.

**Service desk** includes a **Search panel**, an **Add panel** and a **View panel**, which are pre-configured and ready for use. You can, however, customize these panels as required.

## Configuring the Service desk module for the Web client

Configuring **Service desk** for the Web client involves the following steps:

1. Link Service desk to a user group.
2. Link Service desk to a Navigation Panel group.
3. Customize the Search panel.
4. Link the Add panel to a Service list definition.
5. Link the View panel to a Service Desk Edit definition
6. Configure the navigation from Service desk to back-office TSIs.

## Linking Service desk to a user group

You can specify which user groups get access to **Service desk**.

### Procedure

1. Go to ProCenter modules > Web configuration > Service desk.
2. Select a Service desk web definition

3. On the action panel, click Link user group.  
**The Link user group dialog opens.**
4. Select the user group(s) who can have access to Service desk and move them to In Use.
5. Click OK.

## Linking Service Desk to a Navigation Panel group

You can link the **Service desk** module to one or more Navigation Panel groups to make it available to front office users.

### Procedure

1. Go to ProCenter modules > Web configuration > Service desk.
2. On the action panel, click Link to navigation group.  
**A dialog opens.**
3. Select the Navigation Panel group(s) to which you want to link Service desk and move them to In Use.
4. Click OK.

**Service desk is now linked and available in the selected Navigation Panel groups.**

## Customizing the Search panel

You can add fields and change filter settings in the Service desk **Search panel**. The search criteria entered in the **Search panel** will filter both the **Add panel** (new requests and reservations) and the **View panel** (existing requests and reservations).

### Prerequisite

The order fields must be set to in **In use** in **Field definer**.

**Properties, Spaces, Assets and Users** must be linked to the standard orders used on the **Service requests** and **Reservations** web definitions.



For more information, refer to *Field definer > Linking standard orders*.

### Procedure

1. Go to ProCenter modules > Web configuration > Service desk.
2. Select the Search panel block.  
**In the data section, the pre-configured search fields are displayed.**
3. Click the Add fields button to add more fields to the Search panel.
4. Select the field(s) you want to add and click OK.

**Optional: Add an additional search section via the Add bar button.**

Note: Fields are grouped in sections by separating them with a bar. The name of the bar is displayed as the section header.

5. Use the arrow controls to move a new field either to the Who, Where, What sections or any additional section.
6. On the data panel, change the relevant field properties and settings for each individual field as required. For more information, refer to Configuring Service Desk Search fields.
7. Click Save.



- In order to filter the add panel or view panel by a specific field, it must be added as (invisible) search field on these panels. • The more fields you use as filter criterion, the more complex the filtering will become for end users.

## Service list

You can link a **Service list** web definition to the **Add panel** in **Service Desk**, but also to other Web Configuration definitions. By doing so, you make sure that the order types (service requests and reservations) added by end users are based on relevant standard orders.

The **Service list** web definition can contain different types of web definitions. For **Service Desk** however, only service calls and reservations can be shown.

The **Service list** web definition that is linked to the **Add panel** in Service Desk consists of 3 blocks:

- **Standard order** block. This block is used to filter results, based on the fields of the related standard order. Only Order fields that are defined as 'In use' in FieldDefiner can be selected. If you want users to be able to filter standard orders in accordance with the **Search panel**, every field configured on the **Search panel** must also be configured on this block, as (invisible) search field.
- **Search** block. This block is used to add additional filter criteria to the web definition itself. All fields configured on the service request's or reservation wizard's web definition are shown.
- **List block**. In this block, you can configure the fields to be shown and make additional settings. Note that only fields of the web definition can be selected. By default, the **Service** field is selected, which shows the (translated) name of the standard order (if multiple web definitions exist for the same standard order, the (translated) name of the web definition is shown between brackets).

## Linking the Add panel to a Service list



- A pre-configured Service list is available for **Service desk** by default. Use this procedure only if you want to use a different Service list.

If you link the **Add panel** to a **Service list**, the service requests and reservations based on standard orders are added as follows:

- **Service calls** web definitions for service requests
- **Reservation wizard** web definitions for reservations



In order to enable filtering of the **Add panel** based on criteria entered in the **Search panel**, the fields that are defined on the **Search panel** should at least be present as (invisible) fields in the **Search standard order** block.

### Procedure

1. Go to ProCenter modules > Web configuration > Service desk.
2. Select the relevant **Service desk** web definition.
3. On the data panel, the default service list is displayed in the **Services add panel** field.
4. If you want to link a different service list, select it from the dialog box and click **OK**.
5. Click **Save**.

## Configuring the Service desk View panel

You can configure the **View panel** using a **Service Desk Edit** definition. This enables end users to view and edit existing service requests and reservations.

The **View panel** initially shows all existing requests and reservations in two tabs:

- **Service requests:** displays all non-archived main orders.
- **Reservations:** displays all non-archived main reservations.

You can also additionally define:

- which search fields /operators are used to filter the list.
- which fields are shown in the list.
- which fields / bars are shown on the **Details** page that is opened on clicking a row of an order in the **View panel**.

### Preconditions

- Only Order fields that are defined as 'In use' in Field definer can be selected for **Search**, **List** or **Details** blocks.
- In order to filter the **View panel** (Edit block) based upon the data entered in the **Search panel**, the same fields that are defined for the **Search panel** must be present on the **View panel**. They can be made visible through settings in Field definer.

### Procedure

1. Select the Service Desk web definition.
2. In the data section, open the dialog in the Services view panel reference field.
3. From the dialog box, select the relevant Service Desk Edit definition and click **OK**.

4. Click Save.

The **Service Desk Edit** definition is added as a sub to the **Service desk** web definition. You can now select the new **Service Desk Edit** definition and adjust its settings, enter translated navigation names and edit the related **List** page as required.

## Configuring navigation from Service Desk to back-office TSIs

To configure a 'jump' from the Web Client **Service Desk > View panel > Details** page to the back office TSIs - **Work Orders** or **Reservations**.

The purpose is to enable users to edit the selected service request / reservation, as required.

### To configure navigation for service requests

#### Procedure

1. Go to **Sites > Web definitions > Service desk > Service requests > Details**.
2. In the data section, click the **Actions** tab.
3. In the **Button / hyperlink** tab, select **To Work Orders**.
4. In the **Action properties** tab, click the reference button on the TSI for viewing/editing field.
5. Select **Work Orders**.
6. Click **OK**.

### To configure navigation for reservations

#### Procedure

1. Go to **Sites > Web definitions > Service desk > Reservations > Details**.
2. In the data section, select the **Actions** tab.
3. In the **Button / hyperlink** tab, select **To Reservations**.
4. In the **Action properties** tab, click the reference button on the TSI for viewing/editing field.
5. Select **Reservations**.
6. Click **OK**.

## Configuring navigation from Service Desk to back-office TSIs

To configure a 'jump' from the Web Client **Service desk > View panel > Details** page to the back-office TSIs - **Work Orders** or **Reservations**.

The purpose is to enable users (service desk employees) to *edit* the selected service request or reservation, after it is submitted.

### To configure a navigation action for service requests

## Procedure

1. Go to ProCenter modules > Web configuration > Service desk.
2. Select the relevant main Service desk web definition and expand the structure.
3. Select the sub web definition Service desk -edit > Service request list.
4. On the page/block panel, select the Details page.
5. On the data panel, click the Actions tab.
6. In the Button / hyperlink section, select **To Work Orders** .
7. On the Action properties tab, click the Select a value button in the TSI for viewing/editing field.
8. Select the relevant TSI, for example Work Orders .
9. Click OK.
10. Make sure the Is visible field is set to Yes.
11. In the Label field, select and edit translations as required.
12. Click Save.

### To configure a navigation action for reservations


## Procedure


1. Go to ProCenter modules > Web configuration > Service desk.
2. Select the relevant main **Service desk** web definition and expand the structure.
3. Select the sub web definition Service desk -edit > Reservations list.
4. On the page/block panel, select the **Details** page.
5. On the data panel, click the **Actions** tab.
6. In the **Button / hyperlink** section, select **To Reservations**.
7. On the **Action properties** tab, click the **Select a value** button in the **TSI for viewing/editing** field.
8. Select the relevant Reservations TSI.
9. Click **OK**.
10. Make sure the **Is visible** field is set to **Yes**.
11. In the **Label** field, select and edit translations as required.
12. Click **Save**.

## Web content

In the **Web content** module, you can create simple custom HTML pages to display your own content to the end user. You can enter custom HTML, CSS, JavaScript and

translations. These will be combined into an HTML page and published on the home page.

 Web content can be accessed from the **Homepage** or can be linked to a navigation panel group so that it can be accessed from there.

 The HTML, CSS and JavaScript tabs are limited to 32000 characters.


## Adding web content

Use the following procedure to create web content.

### Procedure

1. Go to ProCenter modules > Web configuration > Web content.
2. On the action panel, click Add.
3. In the data section, enter a Code and Description.

On the **HTML**, **CSS**, **Javascript** and / or **Translations** tabs, enter the relevant script. Based on the content provided in these tabs, the output is displayed in the **Web content** gadget on the homepage.

 You require HTML, CSS and Java knowledge to write a script that can be rendered and displayed in the browser. **JQuery** is supported and systems images can also be included in the pages.

4. Click Save.

**The content is ready to be displayed in the gadget on the homepage.**

### Example

The following image shows a few examples of code for HTML, CSS, JavaScript and Translation tabs:

HTML:

```
<h1> [&HeaderText] </h1>
<p> [&ParagraphText] </p>
<button onclick="showImage()">Show image</button>

```

CSS:

```
h1 {
color: red;
```

```

}

.room_image {
width: 25%;
height: 25%;
visibility: hidden; /* Here the image will be invisible */
}

Javascript:

function showImage() {

// Make the image element visible (jQuery is supported)

$( "img" ).css("visibility","visible");

}

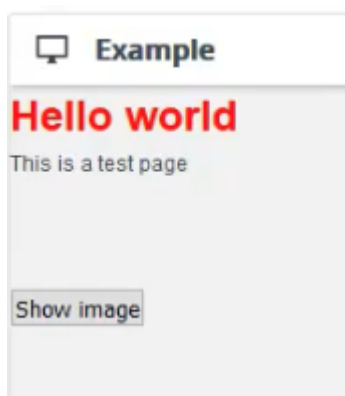
Translation for English:

HeaderText=Hello world

ParagraphText=This is a test page

```

The content is processed and displayed on the homepage as in the image shown below:



On the **Translations** tab you can provide translations for each language.

The format is "key=translation" separated by new lines. Example: HeaderText=Hello world.

You can use the key as a macro in the HTML or JavaScript tabs. The syntax for the macro should be [&key]. Example: [&HeaderText]. The macros in the HTML and



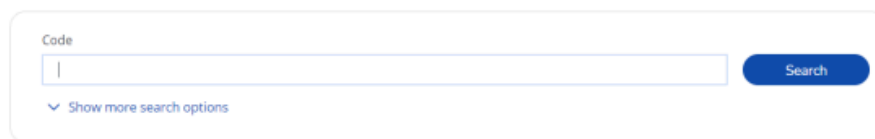
JavaScript tabs will be replaced with the translations belonging to the language of the logged in user.

## Meters

**Meters** is a Web Configuration module that allows you to configure the **Meter search list page**, **Meter details page** and **Meter readings - add page** that are published as a web form for end users. This web form allows end users to:

- view and search the list of meters
- view the details of a meter and the corresponding meter readings
- add new meter readings

### Meter search list



Code

▼ Show more search options

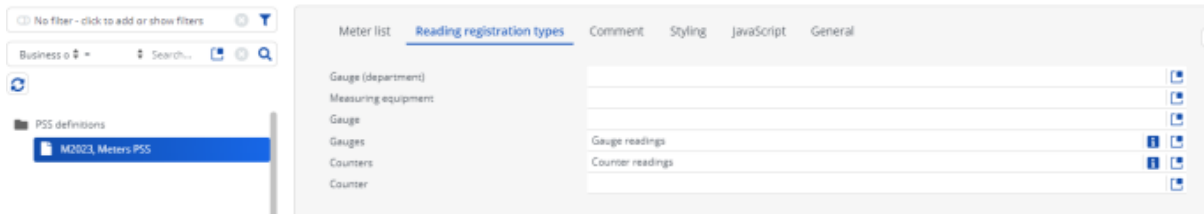
< 1 - 10 of 225 >

Code	Description	EAN code	Date-time of last reading	Value of last reading
0040	000244 Airco Unit - Temperature gauge			
0050	Storage Boiler 249- Hours run meter		11/19/2020 12:00	580
0051	Storage Boiler 250- Hours run meter		11/19/2020 12:00	580
0052	AHU (240) Volume counter		11/19/2020 12:00	190,000
0054	AHU (257) Volume counter		11/19/2020 12:00	210,000
0055	AHU (258) Volume counter		11/19/2020 12:00	225,000
0056	AHU (259) Volume counter		11/19/2020 12:00	160,000
0090	IKENSING2-1			
0096	KBOS-1			


## Adding a meter web definition

### Procedure

1. Go to ProCenter modules > Web configuration > Meters.
2. On the **PSS definitions** action panel, click Add.
3. In the data panel, enter a Code, Description and, optionally, select an Icon and **Image**. This image is used to start the **Meters** web form as a gadget on your homepage. For more information, see Homepage and Adding gadgets to the homepage.
4. Go to the **Reading registration types** tab.



This tab shows all available meter types as configured in Planon. You can set per meter type which type of meter reading should be linked to it, for example 'gauge readings' should be linked to 'gauges'. Now when end users add a meter reading to a meter in the resulting web form, Planon automatically uses the meter reading type as configured in the web definition.

 If nothing is configured on this tab, Planon will use the system reading type.

5. Save your web definition.

You can now configure the pages and blocks of this web definition. For more information see:

- [Configuring the Meter search list](#)
- [Configuring the Meter details page](#)
- [Configuring the Meter readings - add page](#)

## Configuring the Meter search list

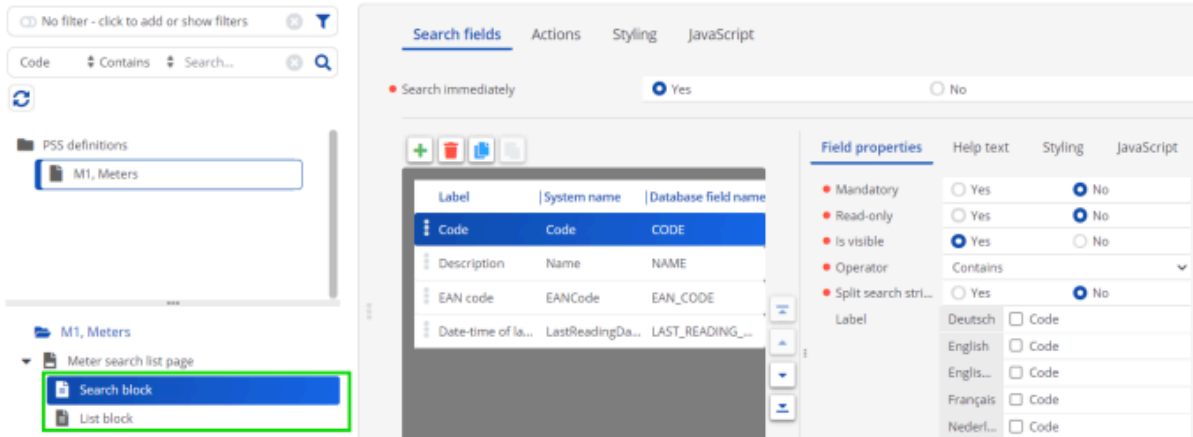
End users can quickly and easily search for a meter and the corresponding meter readings in a list of meters.

### Procedure

1. Go to ProCenter modules > Web configuration > Meters.
2. Select the meter web definition you want to configure.
3. Select **Meter search list page** and specify the page properties (title, help text and styling).
4. Configure the Search block and List block of the Meter search list page.

Here, you can specify the fields that you want to display in the Meter search list web form. For more information, see [Search block](#) and [List block](#).

# Web configuration



## Configuring the Meter details page

End users of the web form can view the details of a meter and the corresponding meter readings.

1. Go to ProCenter modules > Web configuration > Meters.
2. Select the meter web definition you want to configure.
3. Go to the Meter details page. This page consists of the following two blocks:
  - **Meter details block**
  - **Meter readings - list block**
4. Select the **Meter details block**.
5. Specify the counter and gauge fields that you want to display in the Meter details web form.
6. Select the **Meter readings - list block**.
7. Specify the counter reading and gauge reading fields that you want to display in the web form.

## Configuring the Meter readings - add page

End users of the web form can add a new meter reading or update/delete one of the latest meter readings.

1. Go to ProCenter modules > Web configuration > Meters.
2. Select the meter web definition you want to configure.
3. Go to the Meter readings - add page and specify the page properties (title, help text and styling).

4. Configure the Meter details block and Meter readings - add block. See the following steps.
5. Select the **Meter details block**.
6. Specify the counter and gauge fields that you want to display in the Meter details web form.
7. Select the Meter readings - add block.
8. Specify the counter reading and gauge reading fields that you want to display in the web form.

# Examples of Additional SQL

You can add your own additional SQL for advanced filtering, to be appended to the current filter, if the resulting filter on the **List block** is insufficient.

This is possible in almost every list block in Web Configuration , except for fixed lists such as the communication logs of a business object.

This chapter provides examples of additional SQL.

## On Request list:

```
AND MAIN_TABLE.NAAM LIKE '%aa%'

AND MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE CODE =
'100001')

AND MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE SYSCODE =
[&PERSON])

AND (MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE SYSCODE
= [&PERSON]) )

OR (MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE NAAM LIKE
'%bars%'))>
```

## Fixed filter: ( InternalCoordinatorPersonRef = 100011, Ahuis, T.J. )

```
OR (MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE SYSCODE =
[&PERSON]))

OR (MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE NAAM LIKE
'%bars%'))

AND (MAIN_TABLE.SYSMELDER IN (SELECT SYSCODE FROM PERS WHERE NAAM =
MAIN_TABLE.NAAM )
```

## On Publisher list of spaces:

The Join query should be replaced by subselect as shown in the following example:

## Normal query:

```
select * from RMT Inner Join RMTGBR
On RMT.SYSCODE=RMTGBR.SYSRMT
where 1=1 and (RMT.SYSCODE IN (SELECT SYSRMT FROM RMTGBR WHERE
( (EINDDATUM > CURRENT_TIMESTAMP))))
```

## Additional SQL query:

```
AND (MAIN_TABLE.SYSCODE IN (SELECT SYSRMT FROM RMTGBR WHERE
(EINDDATUM > CURRENT_TIMESTAMP) AND (RMTGBR.SYSRMT =
MAIN_TABLE.SYSCODE)))
```

## On parking area utilization:

```
AND TABLE_1.SYSCODE IN (SELECT FK_PARKINGAREA
FROM PLN_PARKINGAREAOFPROPERTY WHERE
PLN_PARKINGAREAOFPROPERTY.DISTANCE='1')
```

For linked properties:

```
AND TABLE_1.SYSCODE IN (SELECT FK_PARKINGAREA
FROM PLN_PARKINGAREAOFPROPERTY WHERE
PLN_PARKINGAREAOFPROPERTY.DISTANCE='1' AND FK_PROPERTY =
TABLE_3.SYSCODE)
```

## Variables

In addition to the SQL statements, the variables you can use in Web Configuration SQL are shown in the following table:

PSS1 Variables	PSS2 Variables
	= [&DATASECTION]
_USER	= [&PERSON]
_USERPROPERTY	= [&PERSON.PROPERTY]
_USERSPACE	= [&PERSON.SPACE]
_USERDEPARTMENT	= [&PERSON.DEPARTMENT]
_USERADDRESS	= [&PERSON.ADDRESS]
_USERCOSTCENTRE	= [&PERSON.COSTCENTER]

The following example shows the use of variables.

**GOAL:** "Show the order of the logged-in user, or the orders that have been repeated (by the back Office) for that user":

PSS1 "From" clause

```
AND ((SYSPERS = _USER) Or
SYSORD In (Select SYSCODE From ORD Where SYSPERS = _USER))
```

PSS2 "From" clause

```
AND ((MAIN_TABLE.SYSPERS = [&PERSON]) Or
(MAIN_TABLE.SYSORD In (Select SYSCODE From ORD Where SYSPERS =
[&PERSON])))
```


# Troubleshooting

---

Issue	Solution
The web definition tab is <not translated>	<p>The tab is user-translatable:</p> <p>Go to TSIs .</p> <p>Select the relevant <b>PssManager_Entry</b> (There may be more than one in your configuration). In Accelerator there are several entries based on PssManager_Entry, for example ProCenter modules - Web configuration, Webclient - Homepage, Webclient - Webclient and the TSIs for AppSuite settings.</p> <p>Go to the <b>TSI</b> level.</p> <p>Expand the tree structure and select the relevant layout.</p> <p>Click Jump to Layouts .</p> <p>On the data panel, note that the tab name is &lt;Not translated&gt;.</p> <p>Switch status to <b>Under Construction</b>.</p> <p>Add translations for the relevant languages and click <b>Save</b>.</p> <p>Switch the status to <b>Completed</b>.</p> <p>Refresh.</p> <p>(repeat this for all Layouts)</p>
Field is missing from a fixed filter	<p>Add the field to the layout.</p> <p>Go to Layouts .</p> <p>For Workflow list: select <b>Orders &gt; BaseOrder</b>. For Service Requests: select <b>Orders &gt; Requests</b>.</p> <p>Set the business object to <b>Under construction</b>.</p> <p>Add the field.</p> <p>Select the field, and make the following settings:</p> <ul style="list-style-type: none"><li>- <b>In selection</b> to <b>Yes</b>.</li><li>- <b>Default</b> to <b>Yes</b>.</li><li>- <b>Use in popup</b> to <b>Yes</b>.</li></ul>

Issue	Solution
Styling issue in IE	<p><b>Save</b> your changes.</p> <p>On the <b>Pop-up</b> tab, set the <b>For use in pop-up</b> option to <b>Yes</b>.</p> <p>Set the business object to <b>Completed</b>.</p> <p>Refresh the data.</p> <p>You can now select your field.</p>
Multi-language support for answer options	<p>Web Configuration web definition styling: looks as if the page is not rendered correctly.</p> <p>This issue may be caused by the “Compatibility view” introduced in IE8. This setting is enabled by default. To switch off this setting:</p> <p>In IE, on the <b>Tools</b> menu &gt; <b>Compatibility view settings</b>.</p> <p>Clear the <b>Display intranet sites in Compatibility View</b> check box.</p> <p>When configuring answer options (Questionnaire Manager), you can only enter the answer options in a single language.</p> <p>For answer options you can enable the option <b>Is user-translatable</b>.</p> <p>For more information on how to enable this setting, see Basics &gt; User translatable list values.</p>
Cannot get the <a href="#">placeholder</a> to display	<p>The browser does not support the placeholder attribute.</p> <p>Check your browser’s specifications and upgrade to a version or browser that does support this HTML5 attribute.</p> <p>See also: <a href="#">Adding a placeholder text</a></p>
I get unexpected results in my <a href="#">homepage</a> ...	<p>The <a href="#">homepage</a> UI may need to be reinstated by clearing the user’s settings.</p> <p>Go to <b>Authorization &gt; User groups</b></p> <p>Under <b>Settings</b>, select the user and click the <b>Clear user screen settings</b> button.</p>



Issue	Solution
<p>An error page appears when checking the URL by clicking the  button</p>	<p>The rendered URL is incorrect (this can happen for <b>homepage</b> and <b>Gadget</b>). You can manually amend the URL to make it work.</p> <p>The rendered URL is:  <code>http://&lt;server&gt;:&lt;port&gt;/case/&lt;site_code&gt;/&lt;start_page_code&gt;/</code></p> <p>Amend part of the Gadget URL:            Replace: <code>/case/&lt;site_code&gt;/&lt;homepage_code&gt;/</code>            With  <b><code>gadget/&lt;site_code&gt;/&lt;homepage_code&gt;/</code></b></p> <p>Do the same for <a href="#">homepage</a>, but then replace the URL with:  <b><code>homepage/&lt;site_code&gt;/&lt;homepage_code&gt;/</code></b></p>
<p>Sorting on number does not work</p>	<p>Add the field <b>SysOrderID</b> to the layout, make it invisible, and then sort accordingly.</p>

# Web Configuration – Field Descriptions

## Web client fields

---


Field	Description
Code	Enter a code to identify the web client definition. The value you enter here will be part of the resulting URL to access this Web client directly .
Description	Enter a meaningful name for this Web client.
URL	The URL of this Web client is populated automatically on saving the web definition. If the Web client is not rendered, see <a href="#">Troubleshooting</a> for a workaround.
Homepage	Select a relevant homepage from the list. This is the homepage that is shown to the user of this Web client.
Remove reference date button	By default, the reference date button is shown in the ribbon and this setting is set to <b>No</b> . If you define a web client for which the display of a reference date button is not required, select <b>Yes</b> .
Remove alarms button	By default, the alarms button is shown in the ribbon and this setting is set to <b>No</b> . If you define a web client for which the display of a alarms button is not required, select <b>Yes</b> .
Remove help button	By default, the help button is shown in the ribbon and this setting is set to <b>No</b> . If you define a web client for which the display of a help button is not required, select <b>Yes</b> .
Logo	Use this field to select or upload a custom logo for the web client.

---

## Homepage fields

Field	Description
<b>General</b>	
Code	Enter a code to identify the homepage. The value you enter here will be part of the resulting URL.
Description	Enter a description to identify the homepage.
Icon	Select the icon that must be displayed next to the title on the home page.
URL	<p>The URL of the homepage is created automatically when saving the homepage.</p> <p>If an error occurs when opening the Web client, see <a href="#">Troubleshooting</a> for a workaround.</p>
Configurable by end user	By default the homepage configuration is enabled for end users. With the gadget library, they can add and remove gadgets from their homepage. Select <b>No</b> if you want to disable homepage configuration.
Override JS	<p>Specify the location of the JavaScript file. This should be a URL to a file, with the following syntax:</p> <pre>http://mycompany.com/override.js</pre> <p>This file should be publicly available. In order to test its availability, you can request it in your browser.</p>
Override CSS	<p>Specify the location of the CSS file. This should be a URL to a file, with the following syntax:</p> <pre>http://mycompany.com/override.css</pre> <p>This file should be publicly available. In order to test its availability, you can request it in your browser.</p>
Gadget width	Specify width of the gadgets in pixels. The default settings are displayed.
Gadget height	Specify height of the gadgets in pixels. The default settings are displayed.
Page title	Enter a home page title in various languages. Select the check box of the language(s) for which

Field	Description
	you want to provide a title and enter the title in the corresponding text box.


 For more information, refer to [Customizing translations](#).

### Gadget filters


Filter type Select the type of filter you want to configure for gadgets (lists and charts) on the homepage: **Date-time** or **Selector**. The following macros are supported to set default values:

- &USERID - only for selectors of business object type User.
- &PERSON - only for selectors of business object type Personnel.
- &PERSON.ADDRESS - only for selectors of business object type Address.
- &PERSON.COSTCENTER - only for selectors of business object type Cost center.
- &PERSON.DEPARTMENT - only for selectors of business object type Department.
- &PERSON.PROPERTY - only for selectors of business object type Property.
- &PERSON.SPACE - only for selectors of business object type Space.

In **Date-time** filter types, all date-time macros (including rounding) are supported to set default values, for example: &DATE, &DATETIME, &STARTOFDAY. If you use the BETWEEN operator, a second field with a default value macro should be available.

 End users cannot use macros in their configured **Date-time** filters.

Selector In **Selector** filter types, you can filter on aspects of a business object. If you choose **Selector**, enter the selector by which gadgets must be filtered. The selector's code must match the selector code of

Field	Description
Operator configurable by end user	<p>the field(s) in the gadgets of your homepage. For example, if you have the <b>Property</b> field as search field on your gadgets, you have to provide the appropriate property selector code in this field so that there is a common field to filter on.</p> <div data-bbox="602 426 1317 543" style="border: 1px solid #00a0e3; padding: 5px;"> <p> You can find the right selector code in <b>Self-Service modules &gt; Publisher</b> by selecting a gadget definition that is on the homepage and going to its <b>search block</b>.</p> </div> <p>Select <b>Yes</b> if you want to allow end users to set the operators to be used in <b>Date-time</b> filters on the homepage. Select <b>No</b> if you only want back-office staff to set the filter's operators.</p> <ul style="list-style-type: none"> <li>• If you select <b>Yes</b>, an additional <b>Operator</b> field is displayed here for <i>back-office staff</i>, where they can select which operator must be applied to the filter: BETWEEN, =, &lt;, &gt;, &lt;=, &gt;= and &lt;&gt;.</li> <li>• If you select <b>No</b>, an <b>Operator</b> drop-down field is displayed on the gadget for <i>end users</i>. When selecting the date, they can select the operator: BETWEEN, =, &lt;, &gt;, &lt;=, &gt;= and &lt;&gt;.</li> </ul>
Operator	Select the operator to be applied. This field is only displayed if the setting <b>Operator configurable by end user</b> is set to <b>No</b> .
Label	Enter an appropriate label for the gadget filter in the selected language(s).
Selected date-time fields	Select the date-time field(s) to which the gadget filter operators should apply.
Applicable web definitions	Select the web definition(s) in which this gadget filter should be used.

## Custom settings



Not all of the attributes listed are available to all chart types. For an overview of availability per chart type, refer to [Attribute availability](#).

Special attributes are available for the following elements to enable you to customize charts:

## Numbers

---

<b>decimalPrecision= "value"</b>	By using this attribute, you can set the number of decimal places of the chart's numbers. Example: decimalPrecision="2"  12,231 → 12,23
<b>formatNumberScale= "value"</b>	Numbers are automatically scaled displaying K,M (Kilo, Million) and proper commas. If you do not want to truncate numbers use:  Example: formatNumberScale="0" 12,5K → 12,500
<b>formatNumber= "0"</b>	If you want to display full numbers without separators, use: Example: formatNumber="0" 12,500 → 12500
<b>decimalSeparator= "character"</b>	By using this attribute, you can set the decimal separator character  Example: decimalSeparator=","
<b>thousandSeparator= "character"</b>	By using this attribute, you can set the thousand separator character  Example: thousandSeparator="."
<b>numberPrefix= "character"</b>	This attribute enables you to specify a prefix to all the numbers visible on a graph. Example: numberPrefix="\$" all numbers on the chart are preceded by the \$ sign.
<b>numberSuffix= "p.a"</b>	This attribute enables you to add a suffix to all numbers visible on the graph. Example: numberSuffix="p.a" Numbers in a graph are followed by the letters p.a. (per annum)

---

## Color

---

<b>bgcolor = "HexColorCode"</b>	This attribute determines the background color of the entire body of the graph. You can change this value to that of any hex color code of your liking.
-------------------------------------	---

Remember that you do not need to assign a "#" at the beginning of the hex color code. That would be taken as a default.

Example: bgcolor="FFFFDD"

**canvasbgcolor=**  
**"HexColorCode"**

This attribute specifies the background color of the graph canvas.

Example: canvasbgcolor="FFDDDD"

**hovercapborder=**  
**"HexCode"**

If you have the showhovercap attribute containing the value 1, you can use this attribute to specify the border color of the hover box.

Example: hovercapborder="666666"

**divlinecolor=**  
**"HexCode"**

If you have opted to show any divisional grid lines on the graph canvas, then by using this attribute you can specify the hex color code for all such lines.

Example: divlinecolor="333333"

**legendboxbgcolor=**  
**"HexColorCode"**

For a Pie chart/doughnut, this attribute lets you set the background color of the legend box.

Example: legendboxbgcolor="F1F1F1"

**legendboxbrdrcolor=**  
**"HexColorCode"**

For a Pie chart/doughnut, this attribute lets you set the border color of the legend box.

Example: legendboxbrdrcolor="333333"

**navbtncolor=**  
**"HexColorCode"**

For a Pie chart/doughnut, this attribute lets you set the color of the navigation buttons (which appear to help us navigate through the legend if the legends number exceeds the display limit).

Example: navbtncolor="666666"

**pieshadowcolor=**  
**"HexColorCode"**

For a Pie chart/doughnut, this attribute lets you set the color of the pie shadow.

Example: pieshadowcolor="666666"

**anchorbrdrcolor=**  
**"NumericalValue"**

For a Line chart, this attribute sets the border color of the anchor that is drawn at the junction of two lines.

Example: anchorbrdrcolor="FF0000"

**anchorb bgcolor=**  
**"FFFFDD"**

For a Line chart, this attribute sets the background color of the anchor that is drawn at the junction of two lines.

Example: anchorb bgcolor="FFFFDD"

**gridbgcolor=**  
**"HexCode"**

If you have opted to show the grid background, then using this attribute you could specify the hex color code for the grid background.

Example: gridbgcolor="F1F1F1"

---

## Font

---

**basefont=**  
**"FontName"**

This attribute sets the base font family of the graph, that is: all the values and the names in the graph will be displayed using the font name provided here.

Example: basefont="Verdana"

**basefontsize=**  
**"ValidFontSize"**

This attribute sets the base font size of the graph, that is: all the values and the names in the graph will be displayed using the font size provided here.

Example: basefontsize="10"

**outCnvBaseFont=**  
**"Fontname"**

This attribute sets the base font family of the chart font which lies outside the canvas i.e., all the values and the names in the chart which lie outside the canvas will be displayed using the font name provided here.

Example: outCnvBaseFont="Arial"

**outCnvBaseFontSize**  
**= "0-72"**

This attribute sets the base font size of the chart i.e., all the values and the names in the chart which lie outside the canvas will be displayed using the font size provided here.

Example: outCnvBaseFontSize="10"

**outCnvBaseFontColor**  
**= "color"**

This attribute sets the base font color of the chart i.e., all the values and the names in the chart which lie outside the canvas will be displayed using the font color provided here.

Example: outCnvBaseFontColor="333333"

---

## Axis

---

**yaxisminvalue=**  
**"0"**

This attribute determines the lower limit of y-axis. If you do not specify this value, it is automatically calculated.

Example: yaxisminvalue="0"



<b>yaxismaxvalue=</b> "0"	This attribute determines the upper limit of y-axis. If you do not specify this value, it is automatically calculated.  Example: yaxismaxvalue="0"
<b>shownames=</b> "0"	This attribute can have either of the two possible values: 1,0. It sets the configuration whether the x-axis values (for the data sets) will be displayed or not. By default, this attribute assumes the value 1, which means that the x-axis names will be displayed.  Example: shownames="1"
<b>showvalues=</b> "0"	This attribute can have either of the two possible values: 1,0. It sets the configuration whether the y-axis numerical values will be displayed along with the columns, bars and the lines. By default, this attribute assumes the value 1, which means that the y-axis values will be displayed.  Example: showvalues="1"
<b>SkipIndex=</b> "NumericalValue"	This attribute helps you to skip the display of a certain range of x-axis values. For example, if you want to display the hits of a site obtained for a particular month graphically. If you were to write the date of each data set in the x-axis, the graph would not give you the required clarity. But, with the help of this option, you can set the graph to display alternate sets of x-axis names. For example, if you set this value to 2, the following x-axis names will be displayed: 1,4,7,10...  Example: SkipIndex="2"
<b>showPercentValues=</b> "1/0"	Whether to show percentage values in labels of the chart.
<b>showPercentInToolTip</b> ="1/0"	Whether to show percentage values in tooltip.
<b>showLimits=</b> "1/0"	Whether to show chart limit values. If not specified showYAxisValues attribute overrides this value.

## Behavior

<b>animation=</b> "1"	This attribute can have either of the two possible values: 1 or 0. A value of 1 (which is assumed by default if this attribute is not provided) indicates that the graph would be animated while it is being
--------------------------	--

rendered. And, the value 0 indicates that the graph is to be rendered in non-animated mode.

Example: animation="0"

**animspeed=**  
**"NumericalValue-**  
**Between1and10"**

If the graph is to be rendered in animated mode, then this attribute determines the speed of animation.

Example: animspeed="2"

**showhovercap=**  
**"1"**

This attribute can have either of the two possible values: 1,0. It sets the configuration whether the data set name and value will be displayed when the mouse is hovered over the data set.

Example: showhovercap="1"

**hovercapbg=**  
**"HexCode"**

If you have the showhovercap attribute containing the value 1, you could use this attribute to specify the background color of the hover box.

Example: hovercapbg="FFFFFFD"

**labelDisplay=**  
**"AUTO/WRAP/**  
**STAGGER/ROTATE/**  
**NONE"**

Using this attribute, you can customize the alignment of data labels (x-axis labels).

There are 5 options:

**AUTO:** By default, this attribute is set to AUTO mode which means that the alignment of the data labels is determined automatically depending on the size of the chart.

**WRAP:** If the text is too long to fit in one line, this option is used.

**STAGGER:** This option divides the labels into multiple lines.

**ROTATE:** This option rotates the labels vertically.

**NONE:** If no option is needed.

**slantLabels=**  
**"1/0"**

If you've opted to show rotated labels on chart, this attribute lets you set the configuration whether the labels will show as slanted labels or fully vertical ones.

**rotateValues=**  
**"1/0"**

If you've opted to show data values, you can rotate them using this attribute.

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## Lines

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**showgridbg=**  
**"1"**

This attribute can have either of the two possible values: 1,0. It sets the configuration whether the background of the grid will be shown or not.

	Example: showgridbg="1"
<b>numdivlines=</b> <b>"value"</b>	This attribute specifies the number of divisional grid lines that would appear on the graph. Example: numdivlines="3"
<b>linethickness=</b> <b>"NumericalValue"</b>	For a line chart, this attribute sets the thickness of the line drawn. Example: linethickness="2"
<b>AnchorScale=</b> <b>"NumericalValue"</b>	For a line chart, this attribute sets the percentage size of the anchor that is drawn at the junction of two lines. By default, the anchor is drawn at a scale of 100. To increase the anchor size, you need to increase this value; conversely, to decrease the anchor size, you need to decrease this value. Example: anchorscale="120"

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## Attribute availability

The following list provides an overview of attributes available per chart type:

Attribute	Bar Chart	Line Chart	Pie Chart
Bgcolor=""	✓	✓	✓
canvasbgcolor=""	✓	✓	✓
xaxisname=""	✓	✓	✓
yaxisname=""	✓	✓	✗
caption=""	✓	✓	✓
yaxisminvalue=""	✓	✓	✗
yaxismaxvalue=""	✓	✓	✗
Animation=""	✓	✓	✓
Animspeed=""	✗	✓	✗
basefont=""	✓	✓	✓
basefontsize=""	✓	✓	✓
basefontcolor=""	✓	✓	✓
shownames=""	✓	✓	✗
showvalues=""	✓	✓	✗
showgridbg=""	✓	✓	✓
gridbgcolor=""	✓	✓	✓
numdivlines=""	✓	✓	✗
divlinecolor=""	✓	✓	✗
showhovercap=""	✓	✓	✗
hovercapbg=""	✓	✓	✗
hovercapborder=""	✓	✓	✗
skipIndex=""	✓	✓	✗
legendboxbgcolor=""	✗	✗	✓
legendboxbrdrcolor=""	✗	✗	✓
navbtncolor=""	✗	✗	✓
pieshadowcolor=""	✗	✗	✓
Linethickness=""	✗	✓	✗
Anchorbrdrcolor=""	✗	✓	✗
Anchorbgcolor=""	✗	✓	✗
Anchorscale=""	✗	✓	✗

## Autosuggest fields

Field	Description
Minimal number of characters	Specify the number of characters that should at least be entered to trigger the autosuggest feature. The more characters you require, the more precise / restrictive the result set will be.  You can enter all characters that are specified for the display value. The search starts after the response time has passed.
Number of results	Specify the result size to be displayed to the user. The maximum size is 20 items.

Field	Description
Delay time	Specify the wait time before search results are compiled. The more wait time you enter, the less load there will be on the server. The default wait time is 300 milliseconds (0.3 second).

## Document fields

Field	Description
Upload tab	
Allow upload	Click <b>Yes</b> to allow users to upload documents. Click <b>No</b> to disable uploading documents.
Use communication log	Click <b>Yes</b> to include the uploaded file as a communication log to the resulting order. Click <b>No</b> to include the uploaded file as an order document to the resulting order.
Communication log type	Select a communication log type to categorize the uploaded documents.
File types	Specify the allowed file type(s). If you enter multiple file types, use a comma (,) as separator — spacing is not required.  Example : docx,txt,jpg  This field allows you to further restrict the types of files that users can upload. The types of files allowed to be uploaded in Self-Service is limited by the file types specified in <b>System Settings &gt; Allowed File types</b> (see also: <b>System file types</b> ).  For example, in <b>System Settings</b> , if '.doc' is the allowed file type and here you try to specify a '.txt' file, an error will display.
System file types	Displays the file types specified in System Settings. In Self-Service <b>File types</b> , you can only specify (a subset of) file types matching the ones displayed here.
Max. upload size (MB)	Specify the maximum file upload size. The maximum file upload size cannot exceed 20 MB.


---

Field	Description
Max. number of uploads	Specify the number of files that can be uploaded (range 1-50).
System max. upload size (MB)	This setting shows the current system wide allowed upload size for secure documents, as set in System Settings - File locations.
Label	A translatable label for the upload block; typically this is <i>Files</i> .
Help text	When you enter an instructions here, these will be shown as an Info icon for the upload field.

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## External content fields

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Field	Description
Code*	Enter a code to identify the gadget. The value you enter here will be part of the resulting URL. For example, G001.
Description*	Enter a meaningful name. The name you enter here is displayed as a link on your web page. For example, Service list gadget.
URL	The URL of the gadget is populated automatically when saving the gadget. Currently an error occurs when clicking the  button to open the page. See <a href="#">Troubleshooting</a> for a workaround.
Content URL	Specify a URL to the Web client or a website whose information is to be displayed in the gadget.

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## Gadget - configuration

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Field	Description
Header text	Specify a display name for the gadget.
Enter a description here...	Specify a description for the gadget. The description is displayed when the gadget is stored in the library.


Field	Description
Gadget content	<p>Select a web definition to be displayed in the gadget.</p> <p>An external content web definition can also be linked in this field to make the external content available to the end user.</p> <div style="border: 1px solid red; padding: 5px; margin: 10px 0;">  Note that not all web definitions can be displayed in a gadget.         </div>
Double row span	Select <b>Yes</b> to set the gadget with double row span.
Double column span	Select <b>Yes</b> to set the gadget with double column span.
Add to library	<p>Click <b>Yes</b>. The gadget is added to the gadget library. End users can add the gadget from the library to Home page.</p> <p>If you click <b>No</b>, the gadget will directly be available on the Home page.</p>

## Space demand form fields

Field	Description
Code*	<p>Enter a code to identify the <b>Space demand form</b>. This field can only contain alphanumeric characters. The entered value will be part of the resulting URL. For example, <i>SDF01</i>.</p>
Description*	<p>Enter a name, which will be displayed as a link on the web page. For example, <i>Demand entry form</i>.</p>
SSP Project Comment Field	Select a comment field from the list.
Space demand status	<p>Select a status from the list. The status shows demand records on the application. For example: <b>Inquire headcount</b>.</p>
Space demand change status	<p>Select a status to be changed once the user confirms the record. For example <b>Demand completed</b>.</p>

Field	Description
Required space demand area headcount fields	Select <b>Yes</b> to display the area fields on the application. Selecting <b>No</b> will not display these fields.

## Mobile start page fields

Field	Description
General tab	
Code	Enter a code to identify the mobile homepage.
Description	Enter a meaningful name.
Page title	Select the check boxes of the language(s) you want to provide with a title and then enter a title in the appropriate text box.
	<div style="border: 1px solid #00a0e3; padding: 5px; display: inline-block;">  For more information, refer to <a href="#">Customizing translations</a>.         </div>
URL	The URL of the mobile home page is created automatically when saving the homepage.

### Link 1 / Link 2 / Link 3 / Link 4 tabs

Navigation name	Select the check box of the language(s) you want to provide with a URL description and then enter a description in the appropriate text box.
URL	Select the check box of the language(s) you want to provide with a URL and then enter a URL in the field.

## Service Desk fields

Field	Description
General tab	
Navigation name	Enter the module name that is to be displayed when navigating the site. You can also provide translations in relevant languages.



Field	Description
URL	<p>The URL of the module is populated automatically when saving it. For <b>Service Desk</b> there is a URL provided when it is added to Web Configuration .</p> <p>Currently an error occurs when clicking the button to open the page. See <a href="#">Troubleshooting</a> for a workaround.</p>
Code*	<p>The default code to identify the <b>Service Desk</b> module. This default can be changed The value entered here is part of the resulting URL. For example, <i>SD01</i>.</p>
Description*	<p>The module name. The Service Desk default name can be changed.</p>
Icon	<p>Select an icon that is to be displayed next to the TSI name on the navigation panel and in the TSI bar.</p>
Site	<p>Displays the linked Web Client site to which the <b>Service Desk</b> module is linked.</p>
Services add panel	<p>Link a <b>Service list</b> definition to the <b>Add</b> panel, by selecting one from the dialog box. You can also add and link a new Service list definition by clicking the <b>Add sub</b> button.</p>
Services view panel	<p>Link a <b>Service Desk Edit</b> definition to the <b>View</b> panel, by selecting one from the dialog box. You can also add and link a new Service Desk Edit definition by clicking the <b>Add sub</b> button.</p>
Comment tab	<p>Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).</p>
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a></p>
JavaScript tab	

Field	Description
	Here you can provide a script for enabling dynamic forms.

## Service Desk Search fields

Field	Description
Selector	<p>Link a relevant selector to the reference field to define its behavior. For example whether it should appear as pop-up, auto-suggest or drop-down.</p> <p>Note: The Search fields for the Search panel are already linked to ready-to-use selectors. In order for the Search panel to work, these selectors should be the default selectors. You can check this in Web Configuration &gt; Web Definitions &gt; Selectors.</p>
Default value	If relevant, enter a macro to populate the field with a default value.
Read-only*	Specify if the field should be read-only or not.
Is visible*	Specify if the field should be hidden or displayed on the web page. Note: if a field is hidden it is still used for filtering.
Operator*	Select an operator for your filter. For Service Desk the default is '='.
Label	Displays the field labels in all languages. These can be modified as required.
Placeholder	If relevant, enter a 'placeholder' field value, to be displayed grayed out on the web site. Placeholders can be used to help end users understand what type of information should be entered.

## Selector fields

Field	Description
Code	Enter a code for the selector.
Description	Enter a description describing the behavior of the selector.

Field	Description
Icon	Select an appropriate icon for the selector.
Is default?	Specify whether this should be a default selector or not.
Fixed filter	Add a filter to the selector, to only display relevant results for a business object's reference field. See <a href="#">Adding a fixed filter to a selector</a> .
Allowed select actions	<p>Indicate the selector's display behavior:</p> <ul style="list-style-type: none"> <li>• <b>Pop-up and auto-suggest</b> : this option is selected by default.</li> <li>• <b>Pop-up</b> : use this option only if the user cannot know what to type. Do not use <b>Pop-up</b> for reference fields that are used as search fields. Use <b>Autosuggest</b> instead.</li> <li>• <b>Autosuggest</b> : use this option for search fields in pop-ups and on list pages.</li> <li>• <b>Drop-down</b> : use this option only if the drop-down list is less than 15 items.</li> </ul>
Business object definition	Displays the business object for which the selector is created.
Site	Displays the site for which the selector is created.
Only show active spaces?	<i>This setting is for Space selectors only.</i> Specify if you only want to show active spaces in lists ( <b>Yes</b> ) and pop-ups or the inactive spaces as well ( <b>No</b> ).
Linked web definitions	Lists the definition(s) in which the selector is used. When changing the selector, you can then assess which definitions are affected and need to be tested.

## CAD Viewer fields

Field	Description
CAD Viewer layout block	
Height (px)	Specify the required CAD viewer screen height in pixels.

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<b>Field</b>	<b>Description</b>
Width (px)	Specify the required CAD viewer screen width in pixels.
Partial fill orientation	Select an orientation for the fill layout for space mapping of spaces with multiple simultaneous space usage. For example, horizontal or vertical.
Overwrite CAD Viewer settings with settings from 'Floor attributes'?	Select <b>Yes</b> to use the text size and rotation angle of a drawing from the <b>Floor attributes</b> during the initial load. The text size and rotation angle can be modified later. This option is set to <b>No</b> by default.
Legend font size	Specify a font size for the legend in the CAD viewer.
Text block font size	Specify a font size for the text block in the CAD viewer.
Title font size	Specify a font size for the title in the CAD viewer.
Background color	Specify a background color for the CAD viewer drawing.
Highlight color	Specify a color to highlight the selected spaces in the CAD viewer drawing.
Legend font color	Specify a font color for the legend text to be displayed in the CAD viewer drawing.
Text block font color	Specify a text block color for the CAD Viewer drawing.

**Actions > Action properties tab - Show constructional data**

Default value	Select <b>Yes</b> to show constructional data by default for each floor plan that is opened. Select <b>No</b> if this not required.
Is visible	Select <b>Yes</b> to show the <b>Show constructional data</b> toggle button on all floor plans.
Label	Change the relevant translations for the toggle button label as required.


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## Knowledge base fields

Field	Description
Knowledge base tab	
Code	Enter a code for the knowledge base definition.
Description	Enter a description for the knowledge base definition.
Comment tab	Enter any remarks for future reference. These remarks are only visible to Planon Administrator(s).
Styling tab	In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.  For more information, see <a href="#">Customizing CSS styling</a> .
General tab	This tab displays the XML make-up of the web definition.

## Knowledge base - configuration

Page/block	Description
List page	On the List page you can: <ul style="list-style-type: none"> <li>• <a href="#">Change the page title</a>.</li> <li>• Customize <a href="#">the styling</a>, if required.</li> <li>• Add a <a href="#">Help text</a>.</li> </ul>
Search block	Specify the fields to be displayed on the initial page that is shown to the user. The user can perform a search using data entered in any of the fields displayed here.  Add the <b>Knowledge base category</b> field.  <b>Show images?:</b> Click <b>Yes</b> , Knowledge Base will display the images you link to each category.

 If you activate the **Enable image field for Self-Service Knowledge base categories** feature switch, the images will be retrieved from the **Image** field in **Knowledge base categories**, or else from the **Image URL** field. For more information on the image fields, refer to *Knowledge base Management*. For more information

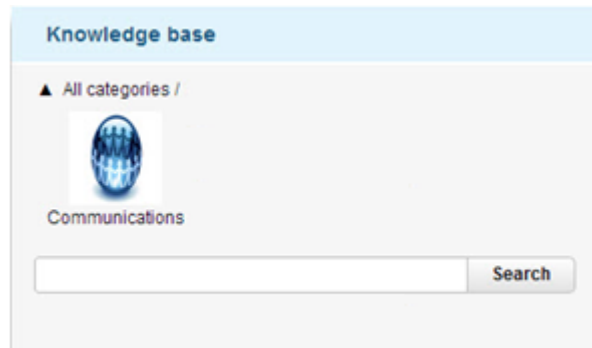
---

**Page/block****Description**

on the feature switches, refer to *System settings > Improved features*.

**Image width:** When showing an image for a category, Knowledge Base will resize it to the width specified here.

**Image height:** When showing an image for a category, Knowledge Base will resize it to the height specified here.

**List block**


Specify how the search results should be displayed to the user.

**Max Number of rows:** Specify the maximum number of results to be displayed on the page.

Display number of results: Click Yes if you want to display a count of the number of pages on the web form:

The count and navigation arrows will be displayed on top of the list.

**Fixed filter:** Specify the filter criteria to be used when performing a search.

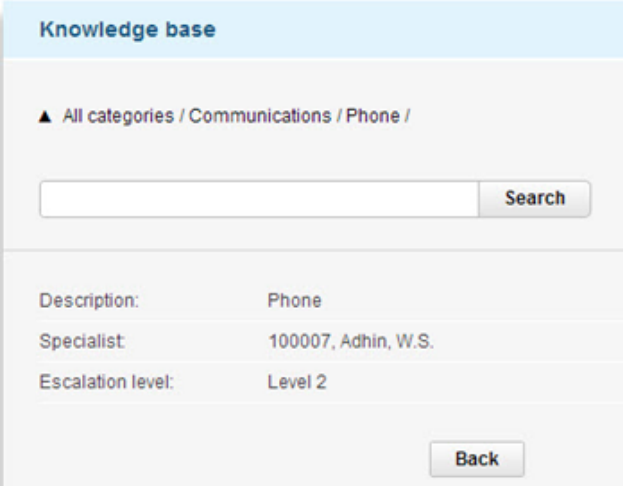
 For adding fields to the filter list, see [Field is missing from a fixed filter](#).

Add the following fields:

- Problem
- Symptoms
- Solution



For these fields you can also include HTML tags or a link. For more information, see [Including HTML](#).

The text specified in PPJC Knowledge Base will be displayed on the page.

Page/block	Description
Details block	<p>Specify the fields to be displayed on the result page that is displayed to the user after clicking an item in the List.</p> <p><b>Example:</b></p>  <p>If you include the <b>Problem, Symptoms, Solution</b> fields on the <b>Details block</b>, you can also include HTML tags or a link. For more information, see <a href="#">Including HTML</a>.</p>

## Knowledge Base - HTML fields

Field	Description
Escape HTML	<p>Click <b>Yes</b>, if you want to display text only. When using this option, only the first paragraph of the text will be displayed.</p> <p>Click <b>No</b>, if you want to enable displaying HTML. Valid HTML code will be interpreted and acted on by your browser. This will allow you to use HTML tags and HTML links in your <b>Symptoms, Solution, and Problem</b> fields.</p> <p><i>Example</i></p> <p><code>&lt;a href="http://www.yourcompany.com/"&gt;Your Company&lt;/a&gt;</code> is rendered as a link to a website, displayed as: <a href="#">Your Company</a>.</p> <p><code>&lt;b&gt;bold&lt;/b&gt;</code> is rendered as <b>bold</b>.</p>

Field	Description
	<div style="border: 1px solid red; padding: 5px;">  If you click <b>No</b>, it is not possible to configure the expandable text feature. </div> <p>If you click <b>No</b> in <b>Escape Html</b> and <b>Enable expandable text</b> fields, text in the text fields is displayed only till the first double <b>ENTER</b> key is encountered.</p>
Enable expandable text	Click <b>Yes</b> to truncate the text.
	<div style="border: 1px solid blue; padding: 5px;">  For more details, see <a href="#">Configuring large text fields</a>. </div>

## Move request list - fields

Field	Description
Move Request list tab	
Navigation name	The translated names of the Move Request list definition. These are the names that are displayed and used for navigation.
URL	The URL of the web definition is populated automatically when saving the web definition.
Code	Enter a code to identify the Move Request list definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name for the Move Request list.
Business object definition	The <b>Move request</b> business object is automatically populated in this field.
Site	Displays the Planon Web Client site to which the <b>Move Requests</b> module is linked.
Move Request wizard	Link the Move Request definition to a Move Request wizard.
Comment tab	
	Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).




Field	Description
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>

## Move request list - configuration

Page/block	Description
List page	Specify the page properties (page title, help text and styling).
List Block	<p>Specify which fields of the move request should be displayed on the list.</p> <p>See also: <a href="#">List block</a></p>
Search Block	<p>Specify the search criteria that will limit the move request's results in the list block.</p> <p>See also: <a href="#">Search Block</a></p>

## Move request wizard - fields

Field	Description
<b>Move Request wizard tab</b>	
Navigation name	The translated names of the Move Request wizard definition. This is the name that is displayed and used for navigation.
URL	The URL of the web definition is created automatically when saving the web definition.
Code	Enter a code to identify the Move Request wizard definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name for the Move Request wizard.

Field	Description
Icon	Select an icon to represent the Move Request wizard in home page gadgets and the Web Client navigation panel.
Business object definition	The <b>Move requests</b> business object is automatically populated in this field.
Site	Displays the Planon Web Client site to which the <b>Move Requests</b> module is linked.
Standard move request	Select the standard move request on which subsequent move requests must be based if they are created through the <b>Move Request</b> wizard.
	<div style="border: 1px solid blue; padding: 5px;"> <p> If you want to allow end users to save a move request as a draft, you must select <b>Draft</b> as initial status on the linked standard move request. You must also do some additional configuration. See <a href="#">Configuring a Draft status for move requests</a>.</p> </div>
Create move line for requestor?	Select <b>Yes</b> if you want to activate the automatic creation of a <i>personnel move line</i> for the requestor. The default value is <b>No</b> .

#### Move request policy tab

Cancellation / editing allowed in request status(es)	Specify the statuses in which users are allowed to cancel/edit move requests in Self-service.
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#### Comment tab


Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).

#### Styling tab


In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.

For more information, see [Customizing CSS styling](#).

#### Messages tab

Field	Description
	<p>In this tab you can customize the Planon messages and warning to suite your own configuration.</p> <p>This allows you to:</p> <ul style="list-style-type: none"> <li>• Change messages and/or translate them into other languages.</li> <li>• Specify a default answer for confirmation messages ( <b>Yes / No / Show confirmation</b> )</li> </ul> <p>Specify how to act on warning messages (<b>Ignore the message / Promote a warning to an error / Show the warning</b>).</p> <div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p> Invisible to the end users, the error/warning numbers are added as CSS class to the element in the resulting HTML. You can use this number to find the corresponding message in the <b>Messages</b> tab.</p> </div>

## Move request wizard - configuration

Page/block	Description
<b>General</b>	
General	Specify the page properties (help text, actions and styling).
Add block	Specify the fields that user may populate. Typically, this contains data about the move request.
Upload block	Specify the upload settings, for example if uploading is allowed, what the maximum upload size is, whether a communication log should be used and if so, which type.
<b>Move persons</b>	
Move persons	Specify the page properties (help text, actions and styling). In the <b>Show personnel move lines</b> field, selecting <b>Yes</b> will display the <b>Move persons</b> step on the move request wizard.
	<div style="border: 1px solid blue; padding: 5px; margin-top: 10px;"> <p> On the move request wizard, for <b>Move persons</b>, <b>Move assets</b>, <b>Special items for move</b> and <b>Overview</b> steps, you can select specific actions for the <b>Cancel</b> buttons. Two fields are available on the <b>Actions</b> tab for the</p> </div>

Page/block	Description
	<p><b>Cancel</b> button to configure this:</p> <ul style="list-style-type: none"> <li>• <b>Action</b> - Select one of the following options: <ul style="list-style-type: none"> <li><b>Delete the request</b> which deletes the move request completely.</li> <li><b>Set to cancel status</b>, which sets the move request to the selected cancel status.</li> </ul> </li> <li>• <b>Cancel status</b> - If <b>Set to cancel status</b> is selected in the <b>Action</b> field, you can select a relevant <b>Cancel</b> status in this field.</li> </ul>
	<p>You can configure the action to be performed for each step individually, based on your requirements.</p>
<p>Person move lines block</p>	<p>Specify the <b>Person move line</b> fields that end users can populate.</p>
<p>Move persons block</p>	<p>If required, configure the selector for personnel and configure the relevant <b>Edit</b> page / <b>Edit</b> block, <b>Add</b> page / <b>Add</b> block and <b>Details</b> page / <b>Details</b> block on this <b>Move Persons</b> block.</p>
<p><b>Move assets</b></p>	
<p>Move assets</p>	<p>Specify the page properties (help text, actions and styling). In the <b>Show asset / special move lines</b> field, selecting <b>Yes</b> will display the <b>Move assets</b> step on the move request wizard.</p>
<p>Asset move lines block</p>	<p>Specify the <b>Asset move line</b> fields that end users can populate.</p>
<p>Move assets block</p>	<p>If required, configure the selector for assets and configure the relevant <b>Edit</b> page / <b>Edit</b> block, <b>Add</b> page / <b>Add</b> block and <b>Details</b> page / <b>Details</b> block on this <b>Move assets</b> block.</p>
<p><b>Special items for move</b></p>	
<p>Special items for move</p>	<p>Specify the page properties (help text, actions and styling). In the <b>Show move's special items</b> field, selecting <b>Yes</b> will display the <b>Special items for move</b> step on the move request wizard.</p>
<p>Special item move lines block</p>	<p>Specify the <b>Show move's special items</b> fields that end users can populate.</p>
<p>Special items move block</p>	<p>If required, configure the relevant <b>Edit</b> page, <b>Add</b> page / <b>Add</b> block and <b>Details</b> page / <b>Details</b> block on this <b>Move special items</b> block.</p>

Page/block	Description
<b>Overview</b>	
Overview	The <b>Overview</b> step summarizes the move request details. Specify a help text that will be displayed at the top of the <b>Overview</b> . On the <b>Actions</b> tab, select the buttons that you want to have available on closing the wizard: <b>Submit request, OK, close wizard, Cancel this request, Save as draft, Print all</b> .
General information block	Specify the fields that users can populate. Typically, this contains data about the move request.
Move lines block	Specify the fields that users can populate. Typically, this contains data about the move request.
Communication logs	Specify the fields that end users can populate.
Order documents	Specify the fields that end users can populate.

## Order list fields

Field	Description
Order list tab	
Code	Enter a code to identify the Order list definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name for the Order list definition.
Business object definition	The <b>Work orders</b> business object is automatically populated in this field.
URL	The URL of the web definition is populated automatically on saving the web definition.
Linked order definitions	<p>Select one or more order definitions to allow the end user to add orders from and to the order list web form. To select the order definition, it first has to be created.</p> <p>For more information about adding an order definition, see <a href="#">Adding an Order definition</a>.</p> <p>By linking an order definition, the users can select a value (Order definition) from the drop-down list after</p>

Field	Description
	which the <b>Add</b> button on the order list web form is enabled.
Preselect first order in list	When you select <b>Yes</b> , the first order in the <b>Add list</b> will be selected automatically on the Web Configuration page.
Placeholder text order selection box	Enter a text (in your preferred language) that should prompt end users to select an order from the drop-down list field on the Web Configuration order form. For example, upon adding a catering order.
Comment tab	Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).
Styling tab	In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied. For more information, see <a href="#">Customizing CSS styling</a> .


## Order list - configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling).
Search block	criteria for finding orders. See also: <a href="#">Search block</a> .
List block	This block will display a list of orders. See also: <a href="#">List block</a> .
Details page	The details specified here will be shown as default details to be displayed if the standard order is missing a specific Order definition. Specify the page properties (title, help text and styling).

Page/block	Description
Details block	Specify the details to be displayed on the web form in the details block.
Order lines block	<p>Specify the order line details to be displayed for a selected order.</p> <p>You can add additional details to the order line by configuring free fields in <b>Field Definer</b> and adding those fields to the <b>Order lines block</b>. All types of free fields are supported. Although you can add multiple free fields to order lines, only 3 fields can be edited simultaneously.</p>

## Orders - fields

Field	Description
Order tab	
Code	Enter a code to identify the Order definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name for the Order definition.
Standard order	Select a standard order. When the order is linked to an order list, the sub orders of this standard order become visible in the on the order list The main standard order, however, is not visible in the Note that only sub orders of type work order will be displayed. These sub orders must also contain the standard order lines.
Business object definition	The <b>Work orders</b> business object is automatically populated in this field.
URL	The URL of the web definition is automatically populated when saving the web definition.
Search & select order lines	It is possible to present larger numbers of order lines on a form without losing performance. Select <b>Yes</b> to activate Search and select order lines. All order lines of the standard order are displayed to enable the user to search and select the relevant order lines and submit them. Only the selected order lines are copied to the form and hence, the process is fast.

Field	Description										
Comment tab	<p>If you select <b>No</b>, all order lines of the standard order are copied to the form. Once the user selects the order lines and submits them, the rest of the order lines must be removed by the system. This may lead to a poorer performance.</p> <div data-bbox="609 443 1317 632" style="border: 1px solid black; padding: 5px;"> <p> Required authorization: The action <b>Included selected standard order lines</b> of the <b>Catering order</b> business object must be added to the function profile of the end users. This will enable them to add extra order lines to an existing catering order.</p> </div> <p>Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).</p>										
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>										
Order policy tab	<table border="0"> <tr> <td data-bbox="318 1276 597 1339">Restrict adding / editing before start date?</td> <td data-bbox="735 1276 1349 1371">Specify if users are allowed to add / edit orders. By clicking <b>Yes</b>, you restrict adding or editing to a period before the order's start date-time.</td> </tr> <tr> <td data-bbox="318 1402 509 1465">Working days in advance</td> <td data-bbox="735 1402 1349 1497">Specify how many working days prior to the order's date of execution you allow users to add / edit orders.</td> </tr> <tr> <td data-bbox="318 1528 461 1556">Time of day</td> <td data-bbox="735 1528 1349 1602">Specify the hour by which users must have completed adding / editing orders.</td> </tr> <tr> <td data-bbox="318 1633 570 1717">Cancellation / editing allowed in order status(es)</td> <td data-bbox="735 1633 1349 1770"> <p>Users can only cancel orders that have a status that is specified here.</p> <p>If you leave this field empty, users will not be allowed to cancel an order.</p> </td> </tr> <tr> <td data-bbox="318 1801 540 1864">Time within parent reservation?</td> <td data-bbox="735 1801 1349 1892"> <p>Select <b>Yes</b> to restrict adding catering orders before or after the main reservation's start and end time. If this means that the catering order occurs outside</p> </td> </tr> </table>	Restrict adding / editing before start date?	Specify if users are allowed to add / edit orders. By clicking <b>Yes</b> , you restrict adding or editing to a period before the order's start date-time.	Working days in advance	Specify how many working days prior to the order's date of execution you allow users to add / edit orders.	Time of day	Specify the hour by which users must have completed adding / editing orders.	Cancellation / editing allowed in order status(es)	<p>Users can only cancel orders that have a status that is specified here.</p> <p>If you leave this field empty, users will not be allowed to cancel an order.</p>	Time within parent reservation?	<p>Select <b>Yes</b> to restrict adding catering orders before or after the main reservation's start and end time. If this means that the catering order occurs outside</p>
Restrict adding / editing before start date?	Specify if users are allowed to add / edit orders. By clicking <b>Yes</b> , you restrict adding or editing to a period before the order's start date-time.										
Working days in advance	Specify how many working days prior to the order's date of execution you allow users to add / edit orders.										
Time of day	Specify the hour by which users must have completed adding / editing orders.										
Cancellation / editing allowed in order status(es)	<p>Users can only cancel orders that have a status that is specified here.</p> <p>If you leave this field empty, users will not be allowed to cancel an order.</p>										
Time within parent reservation?	<p>Select <b>Yes</b> to restrict adding catering orders before or after the main reservation's start and end time. If this means that the catering order occurs outside</p>										




Field	Description
	<p>the parent reservation time, a warning message will be shown to the end user. The catering start and end time will be adjusted so that it remains within the parent reservation's time frame.</p> <p>If the reservation's start time is moved to two hours later, the catering will also start two hours later.</p> <p>Example: a reservation starts at 9:00 and ends at 16:00. The catering is ordered at 12:00. If the reservation is moved to 11:00 hours, the catering is automatically moved forward to 14:00 hours.</p> <p>If you adjust the reservation's end time, for example to 14:00 hours (the reservation is now scheduled from 11:00 to 14:00), this means that the catering order would be delivered after the reservation's end time. Hence, the start and end time of the catering order are also adjusted to keep it within the reservation's time frame.</p>

### Messages tab

In this tab you can customize the Planon messages and warning to suite your own configuration. This allows you to:

- Change messages and/or translate them into other languages.
- Specify a default answer for confirmation messages (**Yes / No / Show confirmation**)

Specify how to act on warning messages (**Ignore the message / Promote a warning to an error / Show the warning**)

 Invisible to the end users, the error/warning numbers are added as CSS class to the element in the resulting HTML. You can use this number to find the corresponding message in the **Messages** tab.

### Questionnaire tab

Use linked questionnaire of standard order?

Click **Yes** to use linked questionnaires. Click **No**, if you do not want to use questionnaires or if you want to use a custom questionnaire.

Other questionnaires

Here you can link a custom questionnaire. Select a questionnaire from the **Other questionnaires** dialog box. The questions of the selected


Field	Description
	questionnaire will be directly displayed on the Web Configuration form.

## Orders - configuration

Page/block	Description
Add page	Specify the title, help text, and translations to be displayed on the web form.
Add block	Specify the fields to be displayed on the web form for entering order data. Typically, this includes data about "Where and When".
Order lines block	<p>Specify the order details to be displayed to users when creating or submitting an order. Typically, this includes data about "What".</p> <p>You can add additional details to the order line by configuring free fields in <b>Field Definer</b> and adding those fields to the <b>Order lines block</b>. All types of free fields are supported. Although you can add multiple free fields to order lines, only 3 fields can be edited simultaneously.</p>
Details page	<p>Specify the title, help text, and translations to be displayed on the web form.</p> <p>This details page will be shown when the order matches the standard order of this Order definition. If there is no match, the default details of the Order list definition will be shown.</p>
Details block	<p>Specify the fields to be displayed when viewing information of an order.</p> <p>On clicking on an item in the list, the details will be shown. If the corresponding Order definition has details specified, these will be shown. If not, the details of the corresponding standard order will be shown.</p>
Edit page	Specify the title, help text, and translations to be displayed on the web form.
Edit block	Specify the fields that can be edited while editing the information of an order.





## Products list page - Actions configuration

Action settings specific to the Products list page **Actions** tab.


Action	Description
Shopping cart	<p>This action displays the  icon on the Product list page. The shopping cart also shows the number of added items and the total price of the added products.</p> <p>If you select <b>Yes</b> on the <b>Show price including tax / VAT</b> setting, the total price displayed will include tax. If you select <b>No</b>, tax is excluded from the total price.</p>
Check out	<p>This action becomes available on the Products list page, if there is at least one product item in the shopping cart. On clicking the <b>Check out</b> button, the user is led to the <b>Add page</b>.</p>
Cancel	<p>This action leads the user back to the Product store list (if accessed from the list), or to the redirect URL.</p>

## Publisher list - configuration

Page/block	Description
List page	<p>On the <b>List page</b> the following tabs are available:</p> <ul style="list-style-type: none"><li>• <b>Page properties</b>. See <a href="#">Customizations via translations</a>.</li><li>• <b>Styling</b>. See .</li><li>• <b>Help text</b>. See <a href="#">Adding help text to a page</a>.</li></ul>
Search block	<p>Select the fields to be displayed on the initial page that is shown to the user. The user can perform a search using data entered in any of the fields displayed here.</p> <p>If you click <b>Yes</b> in the <b>Search immediately</b> field, the search results will immediately be available to the user when displaying the form (in this case, the search will be non-specific).</p> <p>For usability, it is recommended to turn <b>Search immediately</b> on. However, this may impact the performance of the system.</p>

Page/block	Description
List block	Select the fields to be shown on the result page that is displayed after performing a search.
Publisher details	<p>If you want to enable users to view additional data from the same business element, specify a <a href="#">Publisher details definition</a>.</p> <div style="border: 1px solid #0070C0; padding: 5px;"> <p><b>i</b> You can also add a <b>Publisher details</b> definition by clicking the <b>Add child</b> button (  ) in front of the <b>Publisher details</b> field. The Publisher details definition is added under the selected Publisher list definition in the web definitions panel. You can configure its Details page and Details block. In this way, the Publisher details definition is available to its parent Publisher list definition only.</p> </div>
Row expander	<p>If you want to enable users to view further related details, specify a <a href="#">row expander</a> by clicking the <b>Add child</b> button (  ).</p> <div style="border: 1px solid #0070C0; padding: 5px;"> <p><b>i</b> If you are using a Field set layout, you cannot display a row expander.</p> </div>
Layout	<p>Select the layout in which the results will be displayed.</p> <p>For details on layouts, see <a href="#">List Layout</a>.</p>
Max number of rows	Specify the maximum number of results to be displayed on the page.
Display number of results	<p>Click <b>Yes</b> if you want to display a count of the results on the web form:</p> <div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 5px; margin: 5px 0;"> <p>1 - 10 of 117  </p> </div> <p>The count and navigation arrows will be displayed at the top of the list.</p> <p>For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.</p>

## Row expander - configuration

Page/block	Description																						
Expander page	<p>On the Expander page you can:</p> <ul style="list-style-type: none"> <li>• <a href="#">Change the page title</a>.</li> <li>• Customize the <a href="#">Styling</a> as required.</li> <li>• Add a <a href="#">Help text</a>.</li> </ul>																						
Expander block	<p>Specify the fields to be displayed when the user clicks a row to view further details.</p> <p>Customize the styling, if required.</p> <p>You can specify the dynamic behavior of the web form by including javascript.</p> <p>If you include a reference field, you can further specify details. For this, you need to specify a <a href="#">Publisher details definition</a> by clicking the <b>Add child</b> button (  ) in front of the <b>Details reference</b> field.</p> <p>This creates a link to another business object and allows you to add another dimension of detail:</p> <table border="1"> <thead> <tr> <th>Code</th> <th>Surname</th> <th>Initials</th> </tr> </thead> <tbody> <tr> <td>0000000002</td> <td>Grootens</td> <td>F.</td> </tr> <tr> <td>Address:</td> <td colspan="2">Airport Boulevard 101</td> </tr> <tr> <td>City:</td> <td colspan="2"><a href="#">Norg</a></td> </tr> </tbody> </table> <p>Click <b>Add links...</b> to include a link to a related business object. This link is displayed inside the row expander area. For example, a link to contracts:</p> <table border="1"> <thead> <tr> <th>Code</th> <th>Surname</th> </tr> </thead> <tbody> <tr> <td>0000000002</td> <td>Grootens</td> </tr> <tr> <td>Address:</td> <td>Airport Boulevard 101</td> </tr> <tr> <td>City:</td> <td><a href="#">Norg</a></td> </tr> <tr> <td colspan="2"><a href="#">Contracts</a></td> </tr> </tbody> </table>	Code	Surname	Initials	0000000002	Grootens	F.	Address:	Airport Boulevard 101		City:	<a href="#">Norg</a>		Code	Surname	0000000002	Grootens	Address:	Airport Boulevard 101	City:	<a href="#">Norg</a>	<a href="#">Contracts</a>	
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City:	<a href="#">Norg</a>																						
<a href="#">Contracts</a>																							

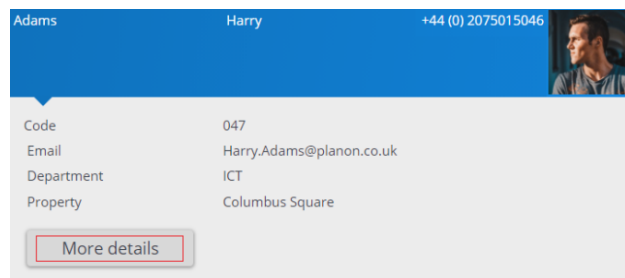
## Publisher details - fields

Field	Description
Code	Enter a code for the Publisher details definition.
Description	Enter a description for the Publisher details definition.

Field	Description
Breadcrumb tab	
Breadcrumb text	Select the check box for the language in which the breadcrumb should be displayed and specify the breadcrumb text.

## Publisher details - configuration

Page/block	Description
Details page	<p>On the Details page you can:</p> <ul style="list-style-type: none"> <li>• <a href="#">Change the page title</a>.</li> <li>• Add a <a href="#">Help text</a>.</li> <li>• <a href="#">Rename the button(s)</a>.</li> <li>• Customize <a href="#">the styling</a>, if required.</li> <li>• Add Association blocks.</li> </ul> <p>This enables you to display additional information, such as visitors linked to a person. On the webpage, association blocks are displayed below details. Per association block you can link another Publisher list or a <a href="#">Publisher chart</a>.</p>
Details block	<p>Specify the fields/bars to be displayed as details to the user.</p> <p>If you do not define a row expander, the <b>Details</b> page is displayed when the user clicks a row.</p> <p>If you define a row expander, the <b>Details</b> page is displayed when the user clicks the <b>More details</b> link on the row expander:</p>



In the **CAD Viewer reference** field, select the relevant CAD Viewer (as defined in the **CAD Viewer** business object in the **Self-Service** modules, see [Configuring CAD Viewer](#)). This CAD Viewer will be displayed when the user clicks the **More details** link. By default, the CAD Viewer displays the space or the fixed workspace of the selected person. If a person has multiple spaces or fixed workspaces, a drop-

Page/block	Description
	down list will be displayed so that the user can select the preferred one.

## Publisher Chart fields

Field	Description
Publisher chart tab	
Code	Enter a code for the Publisher chart definition.
Description	Enter a description for the Publisher chart definition.
Auto-refresh content	Indicate whether you want your output content regularly updated ( <b>Yes</b> ). For example: a dashboard that displays the current number of open work orders.
Auto-refresh time	Specify the refresh rate specified for the <b>Auto-refresh content</b> (in minutes - the minimum refresh rate is 5 minutes)
Breadcrumb tab	
Breadcrumb text	Select the check box for the language in which the breadcrumb should be displayed and specify the breadcrumb text. It is possible to use a macro in this field: <b>[&amp;SELECTION]</b> . For more information, see <a href="#">Breadcrumb</a> .

## Publisher Chart page - configuration

Page/block	Description
Chart page	On the Chart page you can: <ul style="list-style-type: none"> <li>• <a href="#">Change the page title</a>.</li> <li>• Customize <a href="#">the styling</a>, if required.</li> <li>• Add a <a href="#">Help text</a>.</li> <li>• Enable the <a href="#">Print all</a> option, to display a print button on Publisher charts.</li> </ul>
Search block	Specify the fields for which results are returned to the user when clicking Search in the Search page.  If you click <b>Yes</b> in the <b>Search immediately</b> field, the search results will immediately be available to

Page/block	Description
	<p>the user when displaying the form (in this case, the search will be non-specific).</p> <p>For usability, it is recommended to turn Search immediately on. However, this may impact the performance of the system.</p> <p>Allow as HTTP parameter: This feature is only available for reference fields and is available only on Service requests add fields and Publisher search fields. Select Yes on a reference field, to enable this field to be filled via a URL. The syscode of the data and the system name of the reference field you want to use in your form need to be added in the URL. When the parameter (Systemname1=syscode) is used in the URL, the reference field will be pre-filled on the Service request add fields or the Publisher search fields.</p> <p>The URL must have the following components: &lt;PSSlink&gt;? Systemname1=syscode&amp;Systemname2=syscode            URL example: http://&lt;server&gt;:18370/case/demo/RQ? PropertyRef=291&amp;DepartmentRef=26851</p>



 This feature cannot be used in a gadget or in Service Desk.

Chart tab

Fixed filter	Specify a filter for your chart definition. The filter will allow you to fine tune your result data. The chart query will take into account the selection you make here.
Sub list reference	To enable users to click in the chart area to zoom into chart details, you can add a Publisher sub-list.  You can configure this web definition as required. For more information, see <a href="#">Adding a Publisher list</a> .
Sub chart reference	To enable users to click in the chart area to zoom into chart details, you can add a Publisher sub-chart.  You can configure this web definition as required. For more information, see <a href="#">Adding a chart</a> .
Click action operation	Here, you specify how the details of a sub-list or sub-chart are displayed: <ul style="list-style-type: none"> <li>• Show in current frame: to show details in the current gadget.</li> <li>• Show in top frame: to display sub-chart/list in the top frame of your browser.</li> </ul>



Page/block	Description
Log query as event log	<ul style="list-style-type: none"> <li>• Show in parent frame: to replace sub-chart/list in the current web page.</li> <li>• Show in new browser window: to display sub-chart/list in a new browser tab.</li> <li>• Send javascript event: A postMessage containing a URL is sent to the parent frame. The URL can be used to create a customized representation.</li> </ul> <p>Click <b>Yes</b> if you want to log the query into the event log. The event log is available in <b>Supporting data &gt; Log Viewer</b>. This may be helpful in analyzing query performance.</p>
MSSQL query tab / Oracle query tab	<p>Charts are based on queries that are executed on the database. Depending on your database, you need to construct these queries on either the <b>MSSQL query</b> tab or on the <b>Oracle query</b> tab.</p> <p>Make sure to leave the (([&amp;SEARCHFIELDS]) and ([&amp;FILTERFIELDS])) on the tab.</p> <p>To include special, non-latin based unicode characters in chart queries, prefix the SQL code with 'N', for example: <b>N'###/#####'</b>. Without this prefix, the SQL server will interpret the special characters incorrectly and will display the special character part as '?????'.</p> <div data-bbox="602 1182 1317 1276" style="border: 1px solid red; padding: 5px;">  Constructing queries requires SQL knowledge. Make sure your query is performant. </div> <p>For samples of charts and SQL, see <a href="#">Chart examples</a>.</p>
Appearance tab	<p>Chart type</p> <p>Select the type of chart you want to create. The following chart types are available:</p> <ul style="list-style-type: none"> <li>• Angular gauge</li> <li>• Area</li> <li>• Candle stick</li> <li>• Bar</li> <li>• Doughnut</li> <li>• DualY</li> <li>• Line</li> <li>• Pie</li> <li>• Radar</li> <li>• Zoom line</li> </ul>

Page/block	Description
Chart sizing	<ul style="list-style-type: none"> <li>For more information on these chart types, see <a href="#">Supported chart types</a>.</li> </ul> <p>Indicate whether your chart dimensions should be adjusted relative to the website in which it is displayed.</p> <p>If you select <b>Relative</b>, the chart dimensions will scale relative to the website dimensions.</p> <p>If you select <b>Fixed</b>, the chart dimensions will remain as is when changing the website dimensions.</p>
Height	Specify the chart height. If you selected a fixed chart size, your value here should be in pixels. If you selected a relative chart size, your value should be a percentage (number only).
Width	Specify the chart width. If you selected a fixed chart size, your value here should be in pixels. If you selected a relative chart size, your value should be a percentage (number only).
Title	Specify a title for the chart.
Subtitle	Specify a subtitle.
X-axis label	Specify a name for the X-axis.
Y-axis label	Specify a name for the Y-axis.
Number prefix	Specify a prefix to be used preceding all numbers visible on a graph. Example: \$
Number suffix	Specify a suffix to be used for all numbers visible on the graph. Example: p.a (per annum, or yearly).
Show bar horizontally	Click <b>Yes</b> if you want to display the bars of a bar chart horizontally.
Show in 3D	Click <b>Yes</b> , if you want to display your chart in 3D. The chart will be displayed tilted, giving it a three dimensional appearance.
Show stacked	Click <b>Yes</b> , if you want to display the bars of your chart stacked on top of each other.
Show single Y-axis	Click <b>Yes</b> , if you want to display a single Y-axis for your chart.

Page/block	Description
	Click <b>No</b> , if you want to display a double y-axis for your chart.
Fullscreen	Click <b>Yes</b> , if you want to display your chart fullscreen.
Show title when fullscreen	Click <b>Yes</b> , if you want to display a title when displaying your chart fullscreen.
Custom settings	Specify any specific chart settings, for example: chart border, background, gradient fill, background image.  For examples and more settings, see > Configuring Charts or <a href="#">Custom Settings</a> .
Angular gauge dial settings	Specify any specific dial settings, for example: border and background, radius and rear extension, base width and top width, hover effect and more.  For examples and more settings, see <a href="https://www.fusioncharts.com/dev/">https://www.fusioncharts.com/dev/</a> > Configuring Charts or .
Secondary Y-axis 1-5	Specify the secondary Y-axis labels that will be used with DualY charts. The labels and their corresponding value need to be referenced in your SQL query. <pre>select Year as XAxis , bstack as XAxisSub , bstack as XAxisCode , bar as YAxis , 100 as YAxis1Sec , 150 as YAxis2Sec , 200 as YAxis3Sec , 250 as YAxis4Sec , 300 as YAxis5Sec</pre>

#### Additional tab

For angular gauges you should define two sets of ranges: unfiltered and filtered. The unfiltered ranges are used to display the query without taking into account the **Search** fields. This will likely result in a larger data set. The filtered ranges will take into account the **Search** fields, and as the expected result will be less than that of the unfiltered result, the range size will be less.

Page/block	Description
Start range unfiltered	The Search fields are optional. If no <b>Search</b> fields are defined, only the unfiltered configuration will be applied.
Low range unfiltered	Specify the starting position of the angular gauge dial. Typically it starts at 0.
Low range unfiltered	Enter the value for the low range. Angular gauges have three ranges: low, middle and high. Each range is marked by a specific color.
Middle range unfiltered	Enter the value for the middle range.
High range unfiltered	Enter the value for the high range.
Start range filtered	Specify the starting position of the gauge dial. Typically it starts at 0.
Low range filtered	Enter the value for the low range. Angular gauges have three ranges: low, middle and high. Each range is marked by a specific color.
Middle range filtered	Enter the value for the middle range.
High range filtered	Enter the value for the high range.
Render Y-axis as	Specify how to render the Y-axis. The available options are: <ul style="list-style-type: none"> <li>• Line</li> <li>• Area</li> <li>• Column</li> </ul>
Colors tab	Here you can specify chart-specific colors. If these are not specified, the default site colors are used.
Translations tab	Here you can provide a customized translation if required.
Styling tab	In <b>CSS classes</b> you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a

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## Page/block

## Description

reference to a CSS class that is specified on the site, this styling will be applied.

For more information, see [Customizing CSS styling](#).

Javascript tab

Here you can provide a script for enabling dynamic forms.

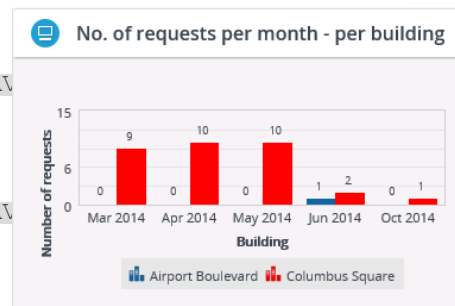
---

## Chart examples

The following table lists sample SQL (MSSQL) and resulting charts.

---

```
Select
Min(LEFT(Datename (Month, ORD.DATINGAVE
3)+Str(Year(ORD .DATINGAVE), 5))
As XAxis
,
Min(LEFT(Datename (Month, ORD.DATINGAVE
3)+Str(Year(ORD .DATINGAVE), 5))
As XAxisCode
, objalg.naam As XAxisSub
, objalg.syscode As
XAxisSubCode
, Count(ord.syscode) AS
YAxis
From ORD
, PLN_BODEFINITION
, OBJALG
Where
ord.fk_bodefinition_userdefined
= pln_bodefinition.syscode
And ord.sysobjalg =
objalg.syscode
And PLN_BODEFINITION.PNNAME
= 'UsrRequest'
And (([&SEARCHFIELDS]) and
([&FILTERFIELDS]))
And Year(ORD.DATINGAVE) =
2014
Group by
Year(ord.datingave)
, Month(ord.datingave)
, objalg.naam
, objalg.syscode
Order by
Year(ord.datingave)
```



```

, Month(ord.datingave)
, objalg.naam
, objalg.syscode

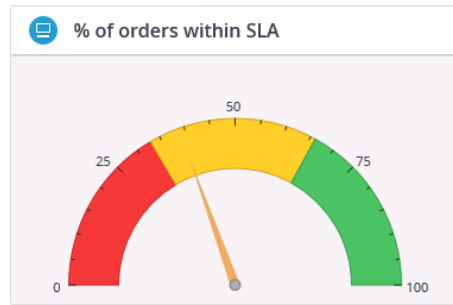
SELECT
(100 * SUM(CASE WHEN
ord.statdat5 is not
null and ord.statdat5 <=
ord.datgewger THEN 1
WHEN ord.statdat5 is
null and ord.statdat6 <=
ord.datgewger THEN 1
ELSE 0 END)
/
COUNT (ord.syscode)) as
GaugeValue
FROM
ord
, pln_bodefinition
, pln_bostate
WHERE
(ord.fk_bodefinition_userdefined
=
pln_bodefinition.syscode)
AND (ord.fk_bostate =
pln_bostate.syscode)
AND (pln_bodefinition.pnname
= 'UsrInternal Work
Order')
AND (pln_bostate.pnname <>
'Cancelled')
AND (ord.datgewger IS NOT
NULL)
AND ((ord.statdat5 IS NOT
NULL) OR (ord.statdat6 IS
NOT
NULL))
AND (([&SEARCHFIELDS]) and
([&FILTERFIELDS]))

```

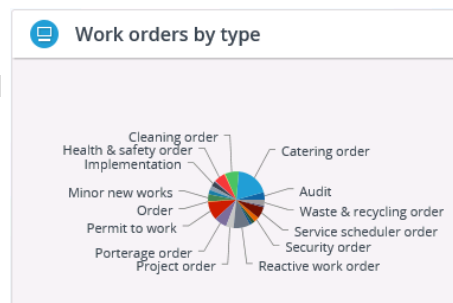
```

select
PLN_LANGBODEFINITION.TRANSLATIONTEXT
XAxis,
count(ORD_NOARCHIVE.SYSCODE)
YAxis
from ORD_NOARCHIVE,
PLN_BODEFINITION,
PLN_LANGBODEFINITION,
PLN_LANGP5DEFINITION
where
ORD_NOARCHIVE.FK_BODEFINITION_USERDEFINED

```



A gauge chart query is a number that is called GaugeValue.



```

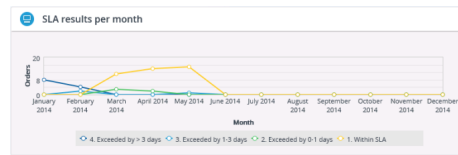
=
PLN_BODEFINITION.SYSCODE
and
PLN_LANGBODEFINITION.FK_LANGP5DEFINITION
=
PLN_LANGP5DEFINITION.SYSCODE
and
PLN_LANGP5DEFINITION.LANGUAGE_CODE
= 'ENG'
and ([[SEARCHFIELDS]]) and
([[FILTERFIELDS]])
group by
PLN_LANGBODEFINITION.TRANSLATIONTEXT

```

```

SELECT
monthtable.MONTHNAME_ENGLISH
+ ' ' + convert(VARCHAR,
monthtable.YEAR) XAxis
,monthtable.SLA XAxisSub
,count(data.value) YAxis
FROM (
SELECT MONTH
,MONTHNAME_ENGLISH
,YEAR
,SLA.SLA_result SLA
FROM PLN_FNDATE
INNER JOIN (
SELECT CASE
WHEN ORD.DATGEWGER >
ORD.STATDAT5
THEN '1. Within SLA'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) <= 1
THEN '2. Exceeded by 0-1
days'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) BETWEEN 1
AND 3
THEN '3. Exceeded by 1-3
days'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) > 3
THEN '4. Exceeded by > 3
days'

```



```

END SLA_result
FROM ORD
WHERE ORD.DATGEWGER IS NOT
NULL
AND ORD.STATDAT5 IS NOT
NULL
) SLA
ON YEAR = year(getdate()) -
0
group by MONTHNAME_ENGLISH
,MONTH, YEAR, SLA.SLA_result
) monthtable
left outer join (
SELECT month(ORD.DATGEWGER)
month
,year(ORD.DATGEWGER) year
,ORD.SYSCODE value
,CASE
WHEN ORD.DATGEWGER >
ORD.STATDAT5
THEN '1. Within SLA'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) <= 1
THEN '2. Exceeded by 0-1
days'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) BETWEEN 1
AND 3
THEN '3. Exceeded by 1-3
days'
WHEN ORD.STATDAT5 >
ORD.DATGEWGER
AND DATEDIFF(d,
ORD.DATGEWGER,
ORD.STATDAT5) > 3
THEN '4. Exceeded by > 3
days'
END SLA_result
FROM ORD
WHERE
ORD.DATGEWGER IS NOT NULL
AND ORD.STATDAT5 IS NOT
NULL
AND (([&SEARCHFIELDS]) AND
([&FILTERFIELDS]))
) data ON monthtable.SLA =
data.SLA_result

```



```

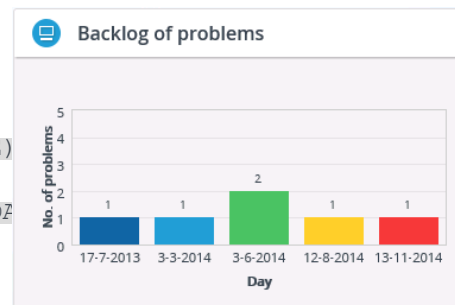
AND monthtable.YEAR =
data.year
and monthtable.MONTH =
data.month
WHERE monthtable.SLA IS NOT
NULL
GROUP BY
monthtable.MONTHNAME_ENGLISH
+ ' ' + convert(VARCHAR,
monthtable.YEAR),
monthtable.MONTH,
monthtable.SLA,
data.SLA_result
ORDER BY
monthtable.MONTH,
monthtable.SLA ASC

```

```

Select
replace (Min (
STR (CASE WHEN
STR (LEN (DAY (ORD_NOARCHIVE.DATINGAVE)
= 1 THEN
replace ('0'+STR (DAY (ORD_NOARCHIVE.DA
' ', '' )
ELSE
DAY (ORD_NOARCHIVE.DATINGAVE)
END) +'-'+
STR (CASE WHEN
STR (LEN (Month (ORD_NOARCHIVE.DATINGAVE) ) )
= 1 THEN
replace ('0'+STR (Month (ORD_NOARCHIVE.DATINGAVE) ) ,
' ', '' )
ELSE
Month (ORD_NOARCHIVE.DATINGAVE)
END) +'-'+
STR (YEAR (ORD_NOARCHIVE.DATINGAVE) , 4) ) ,
' ', '' ) As XAxis,
Count (ORD_NOARCHIVE.SYSCODE)
As YAxis
From
ORD_NOARCHIVE
Inner Join
PLN_BODEFINITION On
PLN_BODEFINITION.SYSCODE =
ORD_NOARCHIVE.FK_BODEFINITION_USERDEFINED
Inner Join PLN_BOSTATE
On PLN_BOSTATE.SYSCODE =
ORD_NOARCHIVE.REF_BOSTATE_USERDEFINED
Inner Join PLN_BOSTATE
PARENTSTATE On
PARENTSTATE.SYSCODE =
PLN_BOSTATE.FK_BOSTATE_SYSTEMPARENT
Where

```



When clicking a column, the following list appears

```

PLN_BODEFINITION.PNNAME =
'UsrProblem'
And PARENTSTATE.PNNAME <>
'Completed'
And PARENTSTATE.PNNAME <>
'Cancelled'
And (([&SEARCHFIELDS]) and
([&FILTERFIELDS]))
Group By
Year(ORD_NOARCHIVE.DATINGAVE),
Month(ORD_NOARCHIVE.DATINGAVE),
Day(ORD_NOARCHIVE.DATINGAVE)
Order By
Year(ORD_NOARCHIVE.DATINGAVE),
Month(ORD_NOARCHIVE.DATINGAVE),
Day(ORD_NOARCHIVE.DATINGAVE)

```

```

Additional SQL WHERE clause
in the Publisher list sub-
list
and exists (
select AAA.SYSCODE
from PLN_BODEFINITION AAA
where AAA.SYSCODE =
MAIN_TABLE.FK_BODEFINITION_USERDEFINED
and AAA.PNNAME =
'UsrProblem' )
and exists (
select BBB.SYSCODE
from PLN_BOSTATE BBB,
PLN_BOSTATE CCC
where BBB.SYSCODE =
MAIN_TABLE.REF_BOSTATE_USERDEFINED
and
BBB.FK_BOSTATE_SYSTEMPARENT
= CCC.SYSCODE
and CCC.PNNAME <>
'Completed'
and CCC.PNNAME <>
'Cancelled' )
and (
MAIN_TABLE.STANDAARD = 'F'
And
MAIN_TABLE.DELETED = 'F'
And
MAIN_TABLE.ARCHIEF = 'F'
And
MAIN_TABLE.REF_BODEFINITION
= 296)
And
Cast(MAIN_TABLE.DATINGAVE

```

Problems

1 - 2 of 2


Number	Description
2527.00	Paper keeps being jammed
2531.00	Paper keeps being jammed

```
as DATE) = Convert(Date,  
[&CLICKVALUE],105)
```

---

## Publisher CAD Viewer fields

---

Field	Description
<b>CAD Viewer reference</b>	Select a CAD Viewer definition from the list.
<b>Publisher asset details reference</b>	Select an asset details page or click on the  <b>Add sub</b> button. A default asset details page is automatically added. You can further configure/customize the page.
<b>Publisher space details reference</b>	Select a space details page or click on the <b>Add sub</b> button. A default space details page is automatically linked. You can further configure/customize the page.
<b>Publisher workspace details reference</b>	Select a workspace details page or click on the <b>Add sub</b> button. A default workspace details page is automatically linked. You can further configure/customize the page.

---

## Reservation list fields

---

Field	Description
Reservation list tab	
Code	Enter a code to identify the Reservation list definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name for the Reservation list.
Business object definition	The business object is automatically populated in this field.
URL	The URL of the web definition is populated automatically when saving the web definition

Comment tab

Field	Description
	Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).
Styling tab	In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied. For more information, see <a href="#">Customizing CSS styling</a> .

## Reservation list - configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling).
List block	Specify which fields of the reservation should be displayed on the list. See also: <a href="#">List block</a> .
Search block	Specify the search criteria that will limit the reservation's results in the list block. See also: <a href="#">Search block</a> .

## Reservation wizard - configuration

Page/block	Description
General	Specify the page properties (help text, actions and styling). Here you can also specify whether you want to use the <a href="#">site redirect URL</a> . If you want to overrule this URL, set <b>Use site redirect URL</b> to <b>No</b> and in the <b>URL</b> field, specify the required address. In the <b>Target</b> field you can further specify a specific frame in your URL address.
Add block	Specify the fields that user may enter information on. Typically this contains data about the reservation.
Planboard	Specify a help text that will be displayed at the top of the wizard's <b>Time and Location</b> step.

## Page/block

## Description

When making a room reservation, on changing the start date-time, the end date-time is automatically updated based on the macro specified in the **Planboard > Search block > Start date & time** field. By default, the difference between the start-time and end-time is maintained at one hour.

If you make the **End date-time** field read-only, the field will still be updated.

Here you can also specify whether you want to use the site redirect URL. If you want to overrule this URL, set **Use site redirect URL** to **No** and in the **URL** field, specify the required address. In the **Target** field you can further specify a specific frame in your URL address.

Planboard  
block


A planboard definition is automatically created. Select the **Planboard** definition in the web definitions panel to further configure it. For example, you can specify how users can select a room in the resulting web page. Depending on the configuration of the web definition, users can select a room from the planboard (**Graphical view**), list (**List view**) or floor plan (**Floor plan**). In the example below, users can select a room from the **Graphical view**.

	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
1.10: Sackla (5) More info									
1.17: Strauss (5) More info									
1.18: Tuukkanen (7) More info									
1.19: Pääsoja (5) More info									
1.20: DeLuca (5) More info									
1.24: Eklund (5) More info									
1.25A: Niemi (7) More info									
1.26B: Mäkelä (7) More info									
1.26: Oksanen (5) More info									
1.27: Schaubert (5) More info									

To configure this feature in the web definition, go to the **Actions** tab. There you can make visibility settings (**Is visible** field, **Yes / No**) and determine the tab position of the views.

The screenshot shows the configuration interface for the 'Reservations' web definition. The 'Actions' tab is active, and the 'Graphical view' is selected. The 'Action properties' section shows the following settings:

- Tab position: 0
- Is visible: Yes (selected)
- Label: Deutsch (selected)

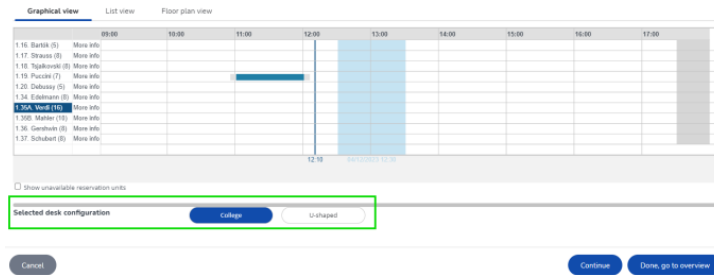
 The configuration for the floor plan view is slightly different and includes some additional steps. See [Configuring the use of the floor plan in the Reservation wizard](#).

## Page/block

## Description

Desk configuration block

If you select **Yes** in the **Include alternative desk configurations** field, the **Selected desk configuration** field will be available on the **Time and Location** tab of the Reservation wizard. The standard desk configuration and alternative desk configuration(s) of a reservation unit are displayed. The standard desk configuration is selected by default, but end users can select an alternative desk configuration:




If an alternative desk configuration is selected, a pop-up will appear asking to create suborders for changing the desk configuration.

Visitors

Specify a help text that will be displayed at the top of the wizard's **Visitors** step.


Visitors block

Click the Add child button (  ) to add a Visitors list definition. This new definition will be added as a sub-definition to the Wizard definition. You can further configure the Visitors list definition after selecting it in the web definitions panel. For information, see [Configuring a Visitor list definition](#). Link a visitor definition to your list. For configuring a Visitor definition, see [Configuring a Visitor definition](#).

Catering

Specify a help text that will be displayed at the top of the wizard's **Catering** step.

Catering block


Click the Add child button (  ) to add a Catering list definition. This new definition will be added as a sub-definition to the Wizard definition. You can further configure the Catering list definition after selecting it in the web definitions panel. For information, see [Configuring an Order list definition](#).

Link a Catering definition to your list. For configuring a Catering definition, see [Configuring a Catering definition](#).


Overview

The overview step summarizes the reservation details. Specify a help text that will be displayed at the top of the wizard's **Overview** step.


Page/block	Description
	<p>Here you can also specify whether you want to use the <a href="#">site redirect URL</a>. If you want to overrule this URL, set <b>Use site redirect URL</b> to <b>No</b> and in the <b>URL</b> field, specify the required address. In the <b>Target</b> field you can further specify a specific frame in your URL address.</p>
Repeated reservation list block	<p>When you are using the recurrence feature in Planon ProCenter , all meetings of the series are displayed in the top block on the web form. Here you can configure specific fields for the number of <b>Visitors, Car parks and Catering</b></p>
General information block	<p>This block displays general reservation information.</p>
Visitors block	<p>This block is used to display visitors linked to the reservation.</p>
Catering block	<p>This block is used to display catering linked to the reservation.</p>
Repeat pattern	<p>The <b>Recurrence</b> dialog box is a pre-configured dialog box; here you can only change the button names.</p>
Additional facilities	<p>Allows you to add the <b>Additional facilities</b> block in the <b>Reservation wizard</b>. Using this feature, the end user can reserve additional facilities (asset units) at the time of making a room reservation.</p> <p>On the <b>Block properties</b> tab, configure the additional facilities fields:</p> <ul style="list-style-type: none"> <li>• <b>Allow additional facilities:</b> Select <b>Yes</b>, to allow the available additional facilities to be displayed at the time of reserving a room.</li> </ul>

 The **Additional facilities categories** should be configured in the **Additional facilities categories** TSI. For more information, see [Additional facility categories](#).


- **Additional facilities standard reservation:** Select a standard reservation.
- **Max number of category rows:** Enter a number. For example, 7. The additional facilities categories will be displayed in 7 rows on the web definition. You can specify a maximum of 50 category rows. In the reservation wizard, all categories are displayed on the same page and if you have

Page/block	Description
	<p>more categories, a scroll bar will be displayed.</p> <ul style="list-style-type: none"> <li>• <b>Search scope:</b> Select a scope value from the list based on which the selection of the facilities will be made. You can select <b>All</b>, <b>Property</b> or <b>Complex</b>. Only additional facilities that are actually available for the selected scope will be displayed.</li> </ul>
	<div style="border: 1px solid black; padding: 5px;"> <p> For more information on configuring the additional facilities, refer to Supporting data &gt; <i>Additional facilities categories</i>. To know more information about the additional facilities fields in asset units, refer to <i>Reservations &gt; Asset units fields</i>.</p> </div>

## Reservation wizard fields


Field	Description
Reservation wizard tab	
Code	Enter a code to identify the Reservation wizard definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name.
Standard reservation	Select the standard reservation on which reservations created via the Reservation wizard will be based.
	<div style="border: 1px solid black; padding: 5px;"> <p> If a standard order is linked to a reservation unit (see <a href="#">Reservation unit fields</a>), Planon uses this standard order as the basis for the reservations created via the wizard. If there is no standard order linked to a reservation unit, Planon uses the value you enter in the <b>Standard reservation</b> in Self-Service.</p> </div>
Allow editing	<p>Specify how reservations booked through Self-Service can be added and edited:</p> <ul style="list-style-type: none"> <li>• Always (allowed to add/edit)</li> <li>• Today onwards: from the start of the current day (from 00:00 hours onwards).</li> <li>• Now onwards: from the current date time and onwards.</li> </ul>



Field	Description
Allow access from Connect for Outlook	<p>If a booking is not editable, users can only see the Overview page, and all buttons will be read-only, except <b>Done, go to overview</b>. By default this setting is <b>Today onwards</b>.</p> <p>Select <b>Yes</b> to allow the web definition to be accessed directly via Connect for Outlook, instead of via the Reservation list.</p>
Business object definition	<p>The <b>Reservations</b> business object is automatically populated in this field.</p>
URL	<p>The URL of the web definition is automatically populated when saving the web definition.</p>
Comment tab	<p>Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).</p>
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied. For more information, see <a href="#">Customizing CSS styling</a>.</p>
Messages tab	<p>In this tab you can customize the Planon messages and warning to suite your own configuration. This allows you to:</p> <ul style="list-style-type: none"> <li>• Change messages and/or translate them into other languages.</li> <li>• Specify a default answer for confirmation messages (<b>Yes / No / Show confirmation</b>)</li> </ul> <p>Specify how to act on warning messages (<b>Ignore the message / Promote a warning to an error / Show the warning</b>)</p>
	<div style="border: 1px solid #0070C0; padding: 5px;"> <p> Invisible to the end users, the error/warning numbers are added as CSS class to the element in the resulting HTML. You can use this number to find the corresponding message in the <b>Messages</b> tab.</p> </div>

Field	Description
Questionnaire tab	
Use linked questionnaire of standard order?	Click <b>Yes</b> to use linked questionnaires. Click <b>No</b> , if you do not want to use questionnaires or if you want to use a custom questionnaire.
Other questionnaires	Here you can link a custom questionnaire. Select a questionnaire from the <b>Other questionnaires</b> dialog box. The questions of the selected questionnaire will be directly displayed on the Web Configuration form.

## Request list fields

Field	Description
Request list tab	
Code	Enter a code to identify the web definition. The value you enter here will be part of the resulting URL (see the <i>URL</i> field).
Description	Enter a meaningful name. The name you enter here is displayed as a link on your web page.
URL	<p>When saving the web definition, the URL for the web definition will be displayed here.</p> <p>Format</p> <p><i>http://&lt;server&gt;:&lt;port&gt;/case/&lt;site code&gt;/&lt;web definition code&gt;/</i></p> <p>When you click the  button behind the field, the form is shown in a browser.</p>

### Comment tab


This tab contains an information field that is meant for Planon Administrators. End users will not be able to view the information stored in this field.




System information relevant to the web definition will be displayed here.

The Planon Administrator can also use this field to log information.


Field	Description
Styling tab	
CSS Classes	<p>Specify your customized CSS class. If this field remains empty, the default CSS styling will be applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>



## Service request fields

Field	Description
Service request tab	
Code	Enter a code to identify the web definition. The value you enter here will be part of the resulting URL (see the URL field).
Description	Enter a meaningful name. The name you enter here is displayed as a link in your browser.
Default standard request	Select a standard request on which the service request should be based by default.
Additional standard request(s)	<p>In some cases it is useful to have the option to choose other standard requests/orders which fill some fields with new information. Select one or more additional standard request(s) from the list that you want to link to the selected Service request.</p> <p>For example, if there is a default standard order called <b>Fix broken coffee machine</b>, there can be additional standard requests called <b>Clean coffee filter</b>, <b>Refill coffee</b> and so on.</p> <p>A special selector is created when adding a standard request to the <b>Add / Edit</b> page filters in turn displays the standard requests on the <b>Search</b> page on the web.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p> For more information on the special selector, refer to <a href="#">Configuring service request definition</a>.</p> </div>
URL	<p>When saving the web definition, the URL for the web definition will be displayed here.</p> <p>Format:</p>

Field	Description
Timeout enable buttons	<p data-bbox="729 254 1281 310"><code>http://&lt;server&gt;:&lt;port&gt;/case/&lt;site code&gt;/&lt;web definition code&gt;codeph&gt;</code></p> <p data-bbox="729 338 1321 401">If you click the  button behind the field, you can view the page in a browser.</p> <p data-bbox="729 436 1357 527">Enter the number of milliseconds, the default setting is 2500. Note that the <b>Submit</b> and <b>Cancel</b> buttons and other actions should be disabled.</p> <p data-bbox="729 548 1357 638">This setting will only be active when a questionnaire is linked to the service call, and dynamic behavior has been defined.</p> <p data-bbox="729 659 1357 716">This setting will give the application the time to apply the dynamic behavior of the questionnaire.</p>
Double requests tab	
Check for double requests	<p data-bbox="729 846 1308 936">Indicate whether you want to check for duplicate requests. Select <b>No</b>, if you want to allow users to report the same issue multiple times.</p> <div data-bbox="602 957 1317 1178" style="border: 1px solid #00a0e3; padding: 5px;"> <p data-bbox="602 968 1243 995"> This may be useful as an indication, for example:</p> <ul data-bbox="639 999 1281 1163" style="list-style-type: none"> <li data-bbox="639 999 1281 1062">• To elevate the priority of a request; the higher the number of incidents, the higher the urgency.</li> <li data-bbox="639 1066 1281 1163">• To assess whether the incident pertains to a specific location or whether this applies to a larger area (a space vs. a floor)</li> </ul> </div> <p data-bbox="729 1192 1333 1318">Select <b>Yes</b> if you do not want multiple people to report the same issue. Subsequently, specify the manner in which the website should respond to the user.</p> <div data-bbox="602 1339 1317 1461" style="border: 1px solid #00a0e3; padding: 5px;"> <p data-bbox="602 1350 1260 1444"> Checking for double requests may be useful if you want to prevent users to unnecessarily raise new requests for issues that are already reported.</p> </div>
Double request error type	<p data-bbox="729 1476 1333 1539">Select the error type to be displayed when a duplicate request is encountered. Available values:</p> <ul data-bbox="729 1543 1333 1669" style="list-style-type: none"> <li data-bbox="729 1543 1333 1606">• <b>Error:</b> Select <i>Error</i> to display an error (the user cannot continue).</li> <li data-bbox="729 1610 1333 1669">• <b>Warning:</b> Select <i>Warning</i> to display a warning (the user can continue).</li> </ul> <p data-bbox="729 1686 1308 1749">If a duplicate occurrence is found, the application returns a warning or an error.</p> <p data-bbox="729 1766 1308 1822">For more information, see <a href="#">Checking for duplicate requests</a>.</p>

Field	Description
Double request detection	<p>When checking for duplicate requests, you must indicate how to perform the check.</p> <p>Select <b>Period</b> when checking for a specific time frame. During this time frame, users will receive either an error or a warning.</p> <p>Select <b>Asset</b> when checking for a specific asset and status.</p> <p>For more information, see <a href="#">Checking for duplicate requests</a>.</p>
Double request - order status	<p>Select the order status that will prompt an error or warning.</p> <p>For more information, see <i>Double request detection</i> and <a href="#">Checking for duplicate requests</a>.</p>
Questionnaire tab	<p>Specify whether you want to display question fields on the web form.</p> <p>Under Other Questionnaires you can also select custom questionnaires. When selecting a custom questionnaire, you can specify the location of questionnaire on the <b>Add</b> page.</p>
Comment tab	<p>Specify any remarks that are important to note down for future reference. The remarks entered here are only visible to the Planon Administrator(s).</p>
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>
Messages tab	

 You can include dynamic form behavior for Questionnaires. For more information, see [Making forms dynamic](#).


Field	Description
	<p>In this tab you can customize the error, warning and confirmation messages to suite your own configuration. This allows you to:</p> <ul style="list-style-type: none"> <li>• Change messages and/or translate them into other languages.</li> <li>• Specify a default answer for confirmation messages (<b>Yes / No / Show confirmation</b>).</li> <li>• Specify how to act on warning messages (<b>Ignore warning / Upgrade warning to error / Show warning</b>).</li> </ul>
	<p> If you select to 'show warning' message configured here, you must remove the help text configuration for this page (Confirmation page &gt; Help text).</p> <p> Invisible to the end users, the error/warning numbers are added as CSS class to the element in the resulting HTML. You can use this number to find the corresponding message in the <b>Messages</b> tab.</p>

General tab


This tab displays XML make-up of the web definition.

## Request list - configuration


Page	Description
List page	Here you define the initial page that is displayed to the user.
Search block	<p>Specify the fields for which results are returned to the user when clicking <b>Search</b> in the <b>Search</b> page.</p> <p>If you click <b>Yes</b> in the <b>Search immediately</b> field, the search results will immediately be available to the user when displaying the form (in this case, the search will be non-specific).</p> <p>For usability, it is recommended to turn <b>Search immediately</b> on. However, this may impact the performance of the system.</p>

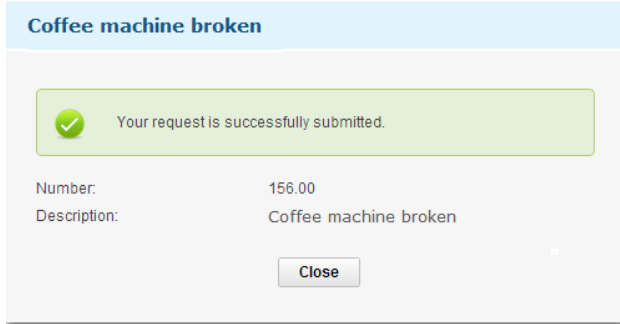

Page	Description
List block	Specify how the search results should be displayed to the user.
Fixed filter	Specify the filter criteria to be used when performing a search. For adding fields to the filter list, see <i>Field is missing from a fixed filter</i> .
Layout	Select the layout in which the results will be displayed. For details on layouts, see <a href="#">List Layout</a> .
Max. number of rows	Specify the number of results to be displayed on a single web page. If the number of results exceeds the number specified here, navigation buttons will be displayed on the web form to navigate through the list.
Display number of results	Click <b>Yes</b> if you want to display a count of the results on the web form:  The count and navigation arrows will be displayed at the top of the list. For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.
Details page	At page level you can specify: <ul style="list-style-type: none"> <li>• Page title</li> <li>• Help text</li> <li>• Button names</li> </ul>
Details	When clicking on an item in the list, the details will be shown.  In the “My requests list”, when clicking on an item in the list, a details page will be shown.  Depending on whether the standard order of the selected order is the same as the standard order of a Service Request definition, the details page as specified for that Service Request definition will be shown.  If the standard order of the selected order is not the same as the standard order of the Service Request definition or if the field is left empty, the details page of the Request List definition is shown.

# Service request - configuration fields

Page/block	Description
Add page	<p>Specify the title, help text and translations to be displayed on the initial <b>Service request</b> form. You can also select the actions you want the user to be able to perform after adding a service request. The following actions are available:</p> <ul style="list-style-type: none"><li>• <b>Submit</b> - adds the service request.</li><li>• <b>Save and add another</b> - to add multiple service requests without having to close and reopen the form. When clicking this action, the current request is saved and a new request is created with the same standard order.</li></ul> <div data-bbox="609 955 1318 1045" style="border: 1px solid #0070C0; padding: 5px;"><p> When using this option, the user cannot create a request of different standard order.</p></div> <ul style="list-style-type: none"><li>• <b>Save as draft</b> - saves the request as a draft version.</li><li>• <b>Update draft</b> - if you have made any changes to a draft and you do not want to save it yet, then you can update the draft.</li><li>• <b>Delete draft</b> - delete the draft version of the request.</li><li>• <b>Cancel</b> - the service request is not added.</li></ul>
Add block	<p>Specify the fields to be displayed and or styling to be used on the initial form.</p> <p><b>Standard order</b> field: If you add the field to the <b>Add</b> block, a <i>Special selector</i> is automatically added to the <b>Service request</b> web definition. This special selector has the functionality of a <a href="#">normal selector</a> with the addition that it only displays standard orders that are linked to the web definition (default &amp; additional standard orders). These standard orders can then be filtered further on the web using the <i>context field</i> functionality.</p>



Page/block	Description
	<p>Allow as HTTP parameter: This feature is only available for reference fields and is available only on Service requests add fields and Publisher search fields. Select Yes on a reference field, to enable this field to be filled via a URL. The syscode of the data and the system name of the reference field you want to use in your form need to be added in the URL. When the parameter (Systemname1=syscode) is used in the URL, the reference field will be pre-filled on the Service request add fields or the Publisher search fields. The URL must have the following components: &lt;PSSlink&gt;? Systemname1=syscode&amp;Systemname2=syscode            URL example: http://&lt;server&gt;:18370/case/demo/RQ?PropertyRef=291&amp;DepartmentRef=26851</p>
Upload block	<div data-bbox="609 793 1317 888" style="border: 1px solid red; padding: 5px; margin-bottom: 10px;">  This feature cannot be used in a gadget or in Service Desk.         </div> <p>Specify whether to allow uploading files for the <b>Service request</b></p> <p>When allowing uploading documents, specify whether the uploaded file will be added as a communication log or as an order document.</p> <p>You can limit the file size and file type of documents to be uploaded.</p> <p>In addition, you can also limit the maximum number of documents to be uploaded (ranging from 1 to 50). By default, the maximum limit is set to 5 .</p>
Edit Page	<p>Specify the title, help text and translations to be displayed on the edit form.</p>
Edit Block	<p>Specify the fields to be displayed and or styling to be used on the edit form.</p> <p>Note: if you add the <b>Standard order</b> field to the <b>Edit</b> block, a <i>Special selector</i> is automatically added to the <b>Service request</b> web definition. This special selector has the functionality of a <a href="#">normal selector</a> with the addition that it only displays standard orders that are linked to the web definition (default &amp; additional standard orders). These standard orders can then be filtered further on the web using the <i>context field</i> functionality.</p>

Page/block	Description
Confirmation page	<p>In addition, you can also limit the file size and file type of documents to be uploaded.</p> <p>A default text is displayed to inform the user that the request was submitted successfully.</p>
	
	<p>Here, you can also specify whether you want to use the site redirect URL (see <a href="#">Adding a site</a>). If you want to overrule this URL, set <b>Use site redirect URL</b> to <b>No</b> and in the <b>URL</b> field, specify the required address. In the <b>Target</b> field you can further specify a specific frame in your URL address.</p>
Details Block	<p>Displays details of the order when the user clicks a result from the <b>Confirmation</b> page.</p>
Uploaded communication logs	<p>Specify how uploaded communication logs are displayed on the <b>Confirmation</b> page.</p>
Uploaded order documents	<p>Specify how uploaded order documents are displayed on the <b>Confirmation</b> page.</p>
Details page	<p>Specify the details to be displayed when referenced from a Request list.</p>
Details block	<p>Specify the details to be displayed when referenced from a Request list.</p>
	<div style="border: 1px solid #0070C0; padding: 5px;">  For more information on referencing request list details, see <a href="#">Request list fields</a>.         </div>
Uploaded communication logs	<p>Specify how uploaded communication logs are displayed on the <b>Details</b> page.</p>
Uploaded order documents	<p>Specify how uploaded order documents are displayed on the <b>Details</b> page.</p>

## Questionnaire fields


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Field	Description
Use linked questionnaire	Indicate whether you want to show questions linked to the standard order. Click <b>No</b> to remove linked questions of the standard order.
Other questionnaires	Select the questionnaire whose linked answer options you want to make available to the end user. You can combine the standard order questionnaire and another questionnaire.

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## Duplicate requests fields

---

Field	Description
Check for double requests	Click <b>Yes</b> to enable the duplicate request check on the selected request.
Double request - error type	Select the type of warning or error that you want to display if a duplicate request is encountered.
Double request detection	Select the criterion by which you want to filter duplicate requests: <ul style="list-style-type: none"><li>• Asset</li><li>• Period</li><li>• Space</li></ul>
Double request - order status	Select the order status(es) on which the check for duplicate requests will take place.
	<div data-bbox="599 1419 1317 1545" style="border: 1px solid black; padding: 5px;"> The <b>Order status</b> is intended to be used in combination with the <b>Asset</b> and <b>Space</b> detection methods.</div>
Double request period	Select a checking period from the list: <ul style="list-style-type: none"><li>• Unspecified</li><li>• Minute</li><li>• Hour</li><li>• Day</li><li>• Week</li><li>• Month</li></ul>

Field	Description
	<ul style="list-style-type: none"> <li>Year</li> </ul> <p>Enter a <b>Quantity</b> for the selected period. During the specified time frame, an error or warning will be displayed if a double request is found.</p>
	<div style="border: 1px solid black; padding: 5px;"> <p> The <b>Double request period</b> field is used in combination with the <b>Period</b> option in the <b>Double request detection</b> field.</p> </div>

## Visitor fields

Field	Description
Visitor tab	
Code	Enter a code to identify the visitor. The value you enter here will be part of the resulting URL.
Description	<p>Enter a meaningful name.</p> <p>The name you enter here is displayed as a link in your browser.</p>
URL	The URL of the web definition is populated automatically when saving the web definition.
Comment tab	
	Specify remarks, if any, for future reference. The remarks entered here are only visible to the Planon Administrator(s).
Messages tab	
Default action	<p>Specify how warning messages must be displayed if a visitor is added outside working hours / days. You can select one of the following options:</p> <ul style="list-style-type: none"> <li><b>Show warning</b> - A warning is displayed. Users can skip the warning and proceed to the next step.</li> <li><b>Upgrade warning to error</b> - An error is displayed. In this case, users can only move</li> </ul>

Field	Description
	<p>to the next step if they take action first.</p> <ul style="list-style-type: none"> <li>• <b>Ignore warning</b> - No warning message is displayed. This is the default option.</li> </ul>
Styling tab	<p>In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>




## Visitor - configuration fields

Page/block	Description
Add page	<p>Specify the title, help text, and translations to be displayed on the web form. You can also select the actions you want perform after adding a visitor. The following actions are available:</p> <ul style="list-style-type: none"> <li>• <b>Submit</b> - adds the visitor.</li> <li>• <b>Submit and set status to arrived</b> - the status of the visitor is immediately changed to <i>Arrived</i> upon adding the visitor. This option is also valid when adding multiple visitors at the same time.</li> <li>• <b>Save and add another</b> - to add multiple visitors at the same time.</li> <li>• <b>Cancel</b> - the visitor is not added.</li> </ul>
Add block	<p>Specify the fields to be displayed on the web form for entering the visitor's data.</p> <p>On the <b>Visitor name &gt; Speed add</b> field select <b>Yes</b> to enable the reception desk employee to enter details of multiple visitors easily in one go. After submitting or saving the form, a visitor is created per name with the details filled in all the fields.</p>

Page/block	Description
	<p>If you select <b>No</b>, the speed add feature will not be available to the user.</p> <p>On the <b>Speed add selector</b> field property, select a selector, for example, comma, to separate the names in the <b>Visitor name</b> field.</p> <p>You can also add fields for reserving a car parking space for a visitor.</p> <p>For more details, see <a href="#">Adding a car park</a>.</p>
Parking area utilization	<p>Specify the car park related fields that are to be displayed on the web form when you choose to have a car park. You can specify details such as: opening time, closing time, distance, number of parking spaces and available parking spaces.</p> <p>In the <b>Fixed filter</b> field, you can create a filter based on which the car parks displayed are pre filtered.</p>
Details page	Specify the title, help text, and translations to be displayed on the web form.
Details block	Specify the fields to be displayed when viewing information of a visitor.
Edit page	Specify the title, help text, and translations to be displayed on the web form.
Edit block	Specify the fields that can be edited while editing the information of a visitor.


## Visitor list fields

Field	Description
Visitor list tab	
Code	Enter a code to identify the visitor list definition. The value you enter here will be part of the resulting URL.
Description	Enter a meaningful name. The name you enter here is displayed as a link in your browser.
URL	The URL of the web definition is populated automatically when saving the web definition.

Field	Description
Visitor Reference	<p>Select a visitor definition by clicking . If you do not select a visitor definition, the end users will not be able to view and edit visitor's information.</p> <div style="border: 1px solid #0070C0; padding: 5px;"> <p> You can also specify a Visitor definition by clicking the <b>Add child</b> button ().</p> </div>

## Visitor list - configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling).
Search block	<p>The initial page that is displayed to the users when they want to view orders assigned to them.</p> <p>If you click <b>Yes</b> in the <b>Search immediately</b> field, the search results will immediately be available to the user when displaying the form (in this case, the search will be non-specific).</p> <p>For usability, it is recommended to turn <b>Search immediately</b> on. However, this may impact the performance of the system.</p> <p>On the <b>Search fields</b> tab, specify the search fields you want to display initially.</p> <p>On the <b>Actions</b> tab, customize the name for the available actions.</p> <p>On the <b>Styling</b> tab, specify the custom styling.</p>
List block	<p>Specify the fields for which results are returned to the user when clicking <b>Search</b> on the <b>Search</b> page.</p> <p>On the <b>Actions</b> tab &gt; <b>Action properties, Is visible</b> select <b>Yes</b> for the status transitions, <b>Arrived</b> and <b>Departed</b>. The <b>Arrived</b> button is available on the visitor form only when the visitor status is <b>Registered</b>. The <b>Departed</b> button is available only when the visitor status is <b>Arrived</b>.</p>
Fixed filter	<p>Specify a filter. Filtering provides a powerful functionality to pinpoint the Visitor list definition to:</p> <ul style="list-style-type: none"> <li>• A Specific visitor</li> <li>• A specific person</li> </ul> <p>For adding fields to the filter list, see <i>Field is missing from a fixed filter</i>.</p>

Page/block	Description
	For fields on a list block you may include JavaScript to influence the dynamic behavior of question fields.
Layout	Select the layout in which the results will be displayed.  For details on layouts, see <a href="#">List Layout</a> .
Max. number of rows	Specify the number of results to be displayed on a single web page. If the number of results exceeds the number specified here, navigation buttons will be displayed on the web form to navigate through the list.
Quick status transition allowed	Select <b>Yes</b> to enable the reception desk employee to change the status of a visitor in a quick and easy way. This is helpful while registering the status of large groups of visitors. If you select <b>No</b> , the status action buttons will not be available on the Visitor form.
Display number of results	Click <b>Yes</b> if you want to display a count of the number of results on the web form:    The count and navigation arrows will be displayed at the top of the list. For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.

## Workflow list fields


Field	Description
Workflow list tab	
Code	Enter a code for the workflow list definition.
Description	Enter a description for the workflow list definition.
Allow direct link to details page	Select <b>Yes</b> if you want to enable a direct link access to the workflow details page.
Comment tab	



Field	Description
	<p>Specify any remarks that are important to note down for future reference. The remarks entered here are only visible to Planon Administrator(s).</p> <p>In <b>CSS classes</b> you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p>
General tab	This tab displays the XML make-up of the web definition.

## Workflow list - configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling).
Search block	<p>The initial page that enables users to view orders assigned to them.</p> <p>If you click <b>Yes</b> in the <b>Search immediately</b> field, the search results will immediately be available to the user on displaying the form (in this case, the search will be non-specific).</p> <p>For usability, it is recommended to turn <b>Search immediately</b> on. However, this may impact the performance of the system.</p> <p>On the <b>Search fields</b> tab, add the search fields you want to display initially.</p> <p>On the <b>Actions</b> tab, customize the names of the available actions.</p> <p>On the <b>Styling</b> tab, specify the custom styling, if any.</p>
List block	Add the fields for which results are returned to the user when clicking <b>Search</b> on the <b>Search</b> page.
Fixed filter	<p>Create and add a filter. Filtering provides powerful functionality to pinpoint the Workflow list definition to a:</p> <ul style="list-style-type: none"> <li>• specific work order type</li> <li>• specific person, and so on...</li> </ul> <p>For adding fields to the filter list, see <i>Field is missing from a fixed filter</i> field in <a href="#">Troubleshooting</a>.</p>

Page/block	Description
	For fields on a list block you may want to include javascript to influence the dynamic behavior of question fields.
Layout	Select the layout in which the results will be displayed. For details on layouts, see <a href="#">List Layout</a> .
Max. number of rows	Specify the number of results to be displayed on a single web page. If the number of results exceeds the specified number, buttons will be displayed on the web form to navigate through the list.
Display number of results	Click <b>Yes</b> to display a count of the results on the web form:  The count and navigation arrows are displayed at the top of the list. For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.

## Workflow details fields

Field	Description
Workflow details	
Code	Enter a code for the workflow details definition.
Description	Enter a description for the workflow details definition.
Workflow list definition	The name of the parent Workflow list definition is populated automatically.
Allowed status	Select the statuses that will be available to the end users. The details of orders that are assigned an allowed status can be viewed by end users.
Questionnaire tab	
Use linked questionnaire of standard order?*	Click <b>Yes</b> to use linked questionnaires. Click <b>No</b> if you do not want to use questionnaires or if you want to use a custom questionnaire.
Other questionnaires	Here you can link a custom questionnaire.

Field	Description
Actions tab - Direct link	
Is visible	Specify if the <b>Direct link</b> button must be visible or not on the details page of a workflow form. <b>Yes</b> is selected by default.
Comment tab	
Comment	Specify any remarks that are important for future reference. These remarks are only visible to Planon Administrator(s).
Styling tab	
	In CSS classes you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.  For more information, see <a href="#">Customizing CSS styling</a> .
General tab	
	This tab displays the XML make-up of the web definition.

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## Workflow details - configuration

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Page/ block	Description
Details page	<p>Click the <b>Add actions...</b> button to select the allowed status transitions.</p> <p>On the <b>Action properties</b> tab, you can link a customized <i>Workflow edit definition</i> per status transition. For status transition actions, selecting <b>Yes</b> in the <b>Status transition only</b> field will enable end users to skip the confirmation page on the workflow details page.</p> <p>You can add a Help text to the status transitions, which will be displayed on the transition arrow:</p>

**Page/  
block**

**Description**

Actions	Action properties	Help text	Styling
<ul style="list-style-type: none"> <li>UsrCancelled-nl</li> <li>UsrCompleted-nl</li> <li>UsrInProgress-nl</li> <li><b>UsrReported-nl</b></li> <li>UsrCancelled.UsrCompleted-nl</li> <li>UsrCancelled.UsrInProgress-nl</li> </ul>		<p>Help text</p> <p>English</p> <p>Click this status transition to edit the current order. &lt;br&gt;By clicking this status, the status is not promoted.</p>	

**Edit**

Click this status transition to edit the current order.  
By clicking this status, the status is not promoted.

Click **Add “sub details” blocks...** to add details. These details will be displayed as embedded in the [Workflow details](#) page.

You need to define a **Workflow order details** definition per type of **Order details** you want to display. *Example:*

If you want to display **Labor hours** embedded in order details, you must link a **Workflow order details** definition on the **Labor hours** business element here.

Code	Description	Page properties	Help text	Actions	Styling
PSS modules (8)					
bnv	bnmv				
SEL0002	User statuses				
SEL0008	Properties				
<b>WFD</b>	<b>My details</b>				
WFE	Edit definition				
WFL	My open Orders				
WFOD	Order Details				
WFOD2	Man-hours details				

Language	Translation
English	Workflow details
Nederlands	Workflowdetails
Planon English	Workflow details

Block properties	Styling
Workflow order details ...	WFOD2, Man-hours details

**Workflow details**

Number: 10.00  
 Description: Building a plasterboard wall  
 Comment (details): Work in progress

**Man-hours**

Code	Description	Number of hours
mh001	Worked hours	12


In Progress

Edit

Completed

Page/ block	Description
Details block	Add the required fields. Note that these fields are displayed as 'read-only'.

## Workflow - Labor hour settings

Field	Description
Minimum number of labor hour lines	<p>Specify a minimum number of labor hour lines.</p> <p>If users edit an order in the <b>Workflow</b> module, they cannot submit the order, unless the minimum number of labor hour lines is added. For example, if the setting on this field is a minimum of 2 lines, the user must enter at least 2 lines, before submitting the order.</p>
Minimum number of hours per line	<p>Enter a minimum number of hours per line or leave it empty. If the field is left empty, there are no restrictions for the value entered on the labor hour lines.</p> <p>If this field contains a value, it means that the tradespeople must enter a number of labor hours equal to or above the set minimum. If they edit an order in the <b>Workflow</b> module, they cannot submit the order lines unless the minimum number of hours per line is added. For example, if the setting is 2 hours, each labor hour line should include at least 2 hours, before submitting the order.</p> <p>This field accepts 'zero' and negative values. In case of negative values, -10 is less than -5. So, if -5 is entered as minimum value, then -1, 0, 0.5, 1 can be entered on the labor hour lines but not -10 or empty value.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> Negative hours are an exception and are usually used for correction purposes.</p> </div>
Allow edit of existing labor hours	Select <b>Yes</b> to allow the user to edit the existing labor hours. If you select <b>No</b> , editing existing labor hours is not possible.
Allow delete of existing labor hours	Select <b>Yes</b> to allow the user to delete the existing labor hours. If you select <b>No</b> , deleting existing labor hours is not possible.

## Workflow edit fields



Field	Description
Workflow edit tab	
Code	Enter a code for the <b>Workflow edit</b> definition.
Description	Enter a description for the <b>Workflow edit</b> definition.
Questionnaire tab	
Use linked questionnaire	Click <b>Yes</b> to use linked questionnaires. Click <b>No</b> if you do not want to use questionnaires or if you want to use a custom questionnaire.
Other questionnaires	Here you can link a custom questionnaire.
Comment tab	
	Specify any remarks that are important for future reference. The remarks entered here are only visible to Planon Administrator(s).
Styling tab	
	In <b>CSS classes</b> you can specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.  For more information, see <i>Customizing CSS styling</i> .
General tab	
	This tab displays the XML make-up of the web definition.

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## Workflow edit - configuration

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Page	Description
Edit page	Specify the page properties (title, help text and styling).


Page	Description
Edit block	<p>The initial page that is displayed to the users if they want to edit the details of their assigned orders.</p> <div style="border: 1px solid #0070C0; padding: 5px;"> <p> Make sure you only add editable fields to the grid.</p> <p> To allow users to add comments to an order, add the <b>Communication logs</b> field. Communication logs allow for an information exchange on the order.</p> </div> <p>Add a <i>hint text</i> to a field on the grid to explain its purpose.</p> <p>On the <b>Styling</b> tab, specify your customized CSS class. If this field remains empty, the default CSS styling is applied. If this field contains a reference to a CSS class that is specified on the site, this styling will be applied.</p> <p>For more information, see <a href="#">Customizing CSS styling</a>.</p> <p>On the <b>Javascript</b> tab, provide your script for enabling dynamic forms.</p>
Question block	<p>Specify the styling for the question block.</p> <p>See <a href="#">Customizing CSS styling</a>.</p>

## Workflow order details fields

Field	Description
Code*	Enter a code for the <b>Workflow order details</b> definition.
Description*	Enter a description for the <b>Workflow order details</b> definition.

## Workflow order details - configuration

Page/block	Description
List page	Specify the page properties (title, help text and styling).
List block	Specify the (order detail) fields to be listed on the order. Add fields to the form as required.

Page/block	Description
List fields tab	
Layout	<p>Select the layout in which the results will be displayed. For details on layouts, see <a href="#">List Layout</a>.</p>
Max. number of rows	<p>Specify the number of results to be displayed on a single web page. If the number of results exceeds the specified number, buttons are displayed on the web form to navigate through the list.</p>
Display number of results	<p>Click <b>Yes</b> if you want to display a count of the results on the web form:</p>  <p>The count and navigation arrows are displayed at the top of the list.</p> <p>For usability, it is recommended to turn the navigation count on. However, this may impact the performance of the system.</p>
Actions tab	<p>You cannot edit the names of actions here as this definition will be embedded as part of the details definition.</p>
Translations tab	<p>Provide a customized translation of the standard message “no results found”.</p>
Styling tab	<p>Specify the styling for the list block. See <a href="#">Customizing CSS styling</a>.</p>



# Index

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