Edition Fundamentals

Planon Software Suite

Version: L100

Planon Building Connections

About this Document

Intended Audience

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

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol contains 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.
	Text preceded by this symbol refers users to other parts of the user documentation for more information.

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Starting the Planon application

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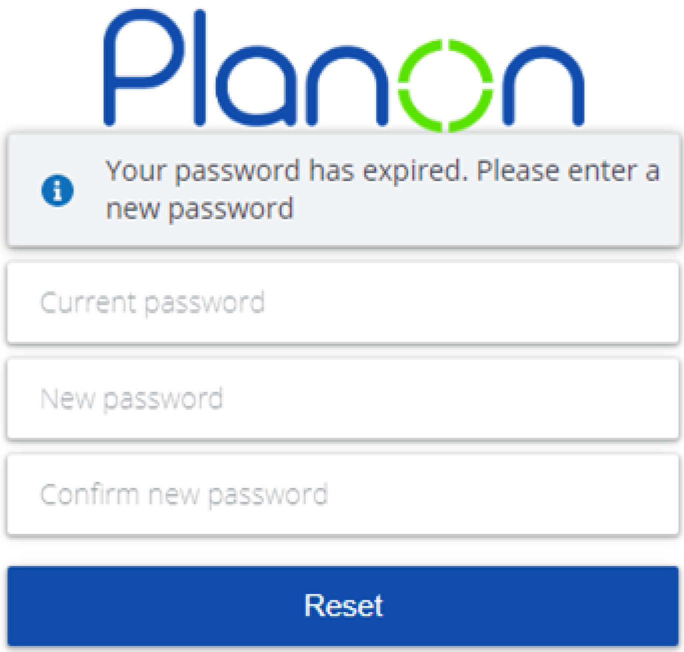
Procedure

1. Click the Planon Web Client URL.
2. In the login screen, enter your **User name** and **Password**.

3. Click **Login**.

- The login page appears in the language of the browser. If this language is not supported, the login page appears in the locale of the server.
- You can override this by configuration. For more information, see Configuring the login language.
- After logging in, the Web Client appears in the language of the user account.
  If your organization uses 'single sign on' to log in, you might not see the login page.

  If your password is reset, depending on the password settings, you will be prompted to change your password at the time of logging in.



- In the **Current password** field, enter your current password.
- In the **New password** field, enter your new password.
- In the **Confirm new password** field, re-enter your new password for confirmation.
- Click **OK**.

Logging out

You can log out of the Planon Web Client in three ways:

- Using the Log out button on your account information.

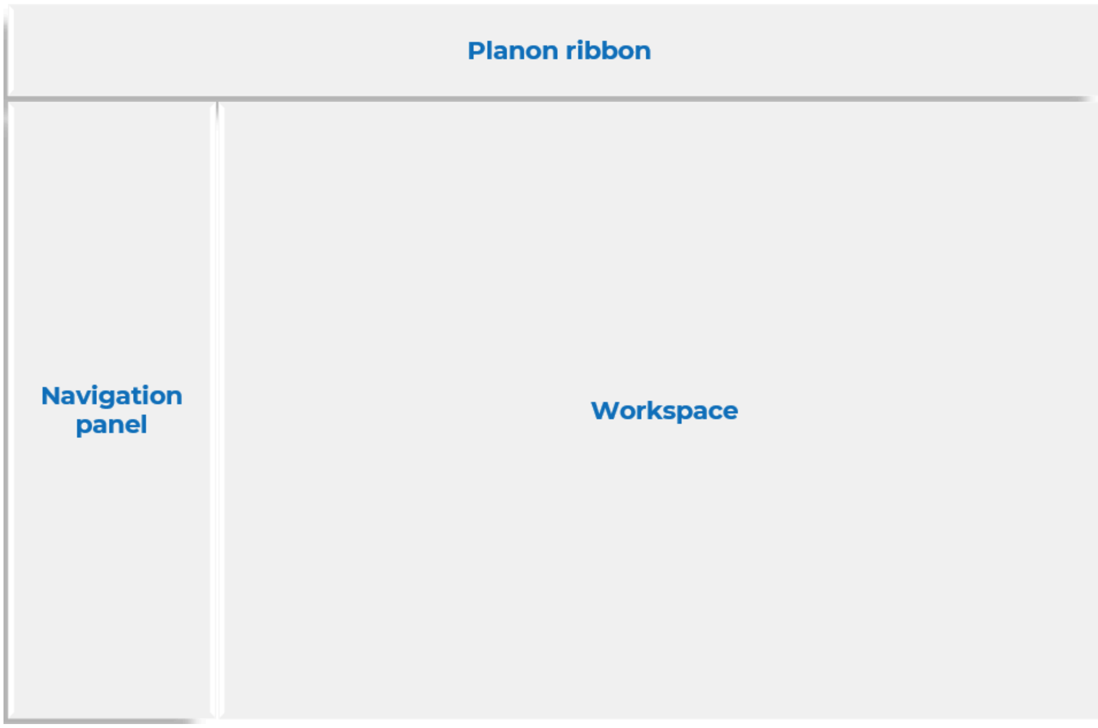
  This is the preferred way, as this frees your license.
- Closing the browser - the session will expire after a certain time, only then the license will be freed.
- If you do not use the application for a certain period of time specified by your administrator, you will be logged out automatically.

Overview

This topic describes the basic features of Planon and its various screen elements.

The Planon user interface mainly consists of these sections.

- **Planon ribbon**
- **Navigation panel**
- **Workspace**



Planon ribbon	The ribbon contains the navigation panel toggle button and the Planon logo on the left side and some generic features which work across the application. For more information about the options on the ribbon, see Planon ribbon.
Navigation panel	The navigation panel allows you to navigate through the different modules of the application. Click a navigation item to open the module in the workspace. For more information, see Navigation.
Workspace	The Workspace is that part of your screen where a user interface module such as the homepage or a TSI is displayed. For more information, see Homepage.

Multi tab browser support

- You can open Planon in multiple tabs on your browser.
- A single login works for all browser tabs.
- Only one module license is used for all tabs.

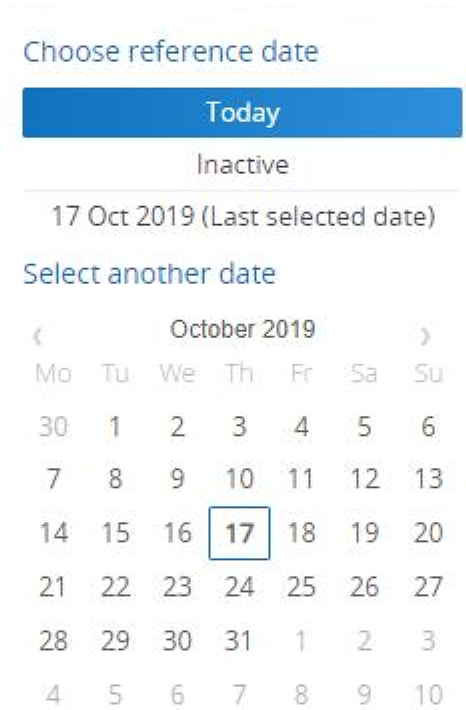
- When you open the application in different tabs, you can view the same or different TSIs from your navigation panel.
- This can be done by copying the URL to a new tab or right-clicking a TSI in the navigation panel and opening it in a new tab or a window.

Planon ribbon
Navigation panel
Accessibility
Homepage

Planon ribbon

The Planon ribbon contains general screen elements and functions that are applicable across the application.

- The **Planon** logo.
- The **reference date** button **Today** is selected by default. The **Choose reference date** option allows you to select a specific date from the calendar. The selected reference date is taken into account for all transactions across the application.
You can deactivate the reference date by selecting the **Inactive** option. The **Select another date** option enables you to select a different date as a reference date.



- Clicking the  button will redirect you to the alarms set for you.
- Clicking the  button will redirect you to the Planon Web Help. See: Help menu.
- Click My account to view/edit personal information.
- Click **Log out** to log out of Planon Web Client. Your license will be released and you will be redirected to the login screen.

Help menu
My account

Help menu

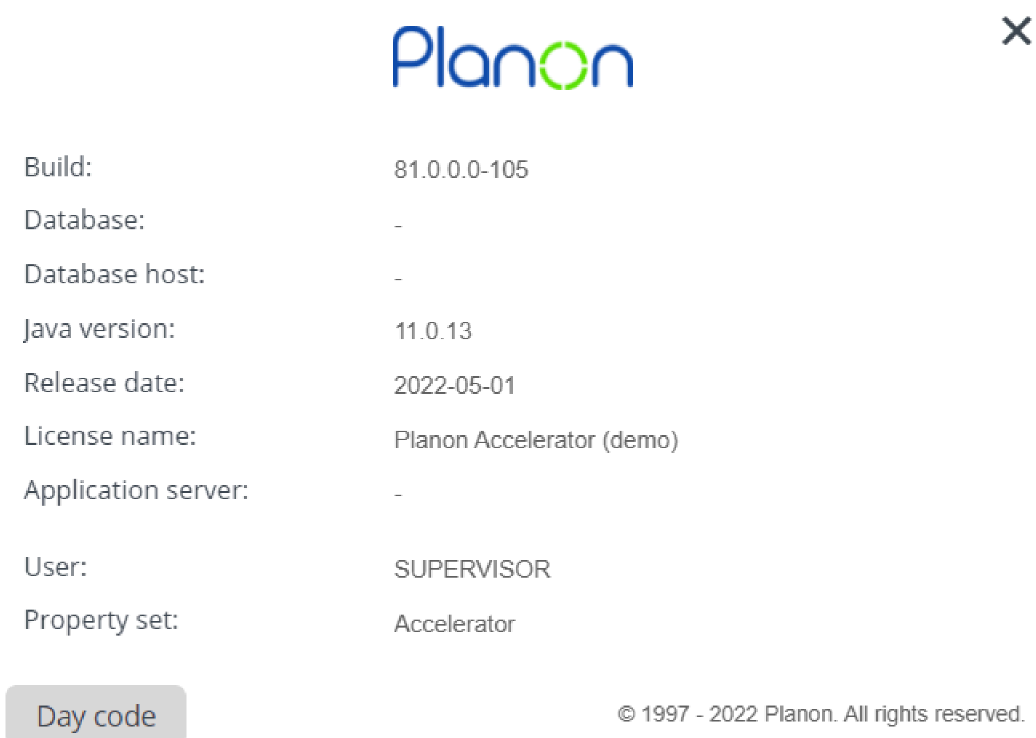
Planon features a **Help** button in the top-right corner that opens a menu providing access to information about the software and privacy statement of your company (GDPR legislation).

The options listed in the **Help** menu are:

- **TSI Help**: Enables you to view help information related to the TSI that is active on the screen. The option is visible only if a document/web page related URL is specified in TSI Help URL. If there is no URL specified, the option will not be visible in the menu.
- **WebHelp**: Enables a user to start and view the Planon WebHelp. The WebHelp is displayed in the language of the version of the WebHelp specified in the Help URL field (System settings).
- **Privacy statement**: Enables you to view the privacy statement of your company to be compliant with GDPR regulation. The privacy statement can be specified in **General settings** TSI > **Privacy Statement**. If there is no privacy statement specified, the option will not be visible in the menu. For more information about the Privacy Policy statement, see Privacy statement.
- **About**: Enables you to get information about the version of Planon you are using.

  Tip For information about the history of installed versions of Planon in your environment, see Creating a product version overview.

  - This information is important in the communication with Planon or to assess whether an update should be considered (based on the release date)



- **Keyboard shortcuts**: Enables you to view the available keyboard shortcuts in Planon. For more keyboard shortcuts, refer to Shortcut keys.

My account

The **My account** button in the **Account** menu allows you to edit your personal information.

If you click the **Edit** button in **My account**, you can change your password, edit personal data and other settings.

In **My account**, Planon provides several basic options.

Planon application managers can add or remove fields in this window in the Web Configuration TSI. For more information, see Making My account settings for end users.

- **Account details**. You can view your **User name**, **Password expiry date** and change your password with the **Change password** option.
- **Personal data**. You can edit your personal data, such as **First name**, **Surname**, **Email**, **Telephone**, **Property**, **Department** and **Photo**. You can also change your photo by dragging and dropping an image or by browsing for the right file.
- **My account settings**. You can specify settings such as **Theme**, **Use 24 hour notation?**, **Planon Language**, **Displayed unit of length** and **Autoselect first item in list**

Tip To view the changes, save and re-login to the account.

The name displayed in the **My Account** list is either derived from the account or the person linked to the account. This table shows the name that is displayed.

Account		Person		Displayed
User name	**Description**	**First name**	**Last name**	
WEASLY	Adam Weasly	Adam	Bilt	Adam Bilt
WEASLY	Adam Weasly	Adam		Adam
WEASLY	Adam Weasly		Bilt	Bilt
WEASLY	Adam Weasly			Adam Weasly
WEASLY		Adam	Bilt	Adam Bilt
WEASLY		Adam		Adam
WEASLY			Bilt	Bilt
WEASLY				WEASLY

The photo displayed on the **My Account** menu is determined based on this table.

Account - Photo	Person - Photo	Photo displayed in 'My Account'
Y	Y	Person-Photo
Y	N	Default image

Account - Photo	Person - Photo	Photo displayed in 'My Account'
N	Y	Person-Photo
N	N	Default image

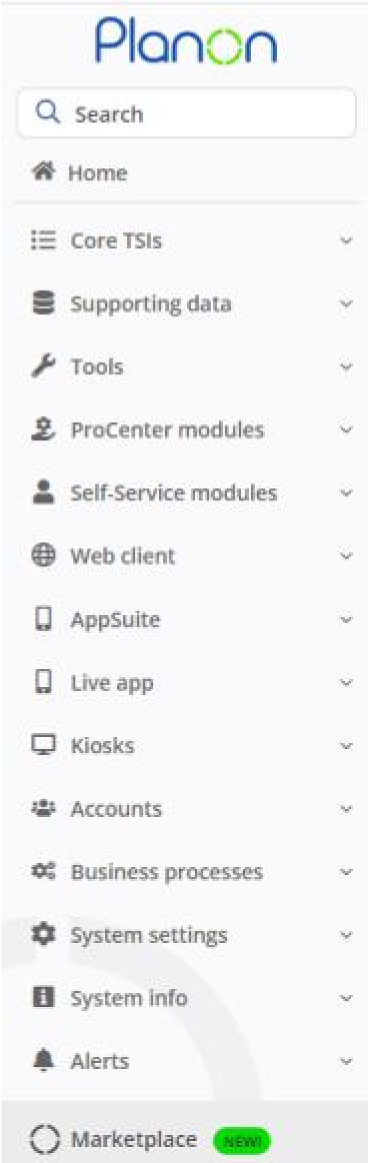
If no photo is selected in the **Photo** field, a default image appears. This placeholder displays one or two characters. This example shows which characters might appear in the default image.

Account - User name	Person - First name	Person - Surname	Displayed
WEASLY	Adam	Bilt	AB
WEASLY	Adam		A
WEASLY		Bilt	B
WEASLY			W

If **First Name** and **Surname** do not contain any value, then it means the fields are empty (none of them are system mandatory) or no person is linked to the account.

Navigation panel

The navigation panel displays the available navigation groups. Navigation groups typically include various functionality related navigation items (TSIs or URLs).



Instead of browsing for navigation items, you can search for them using the quick search bar 

.

For easy access, the search will remember your last five searched items and display them when you click in the search bar.

Navigation panel modes

Expanded and pinned: This is the default mode. In this mode, the navigation panel is always visible on the same plain as the workspace. It is pinned and all the TSIs are available to be opened in the workspace. You can collapse the navigation panel by clicking the  button.

The panel can be pinned, only if the screen resolution is more than 1200 pixels.

Collapsed: In this mode, the navigation panel is hidden. You can expand the navigation panel by placing the cursor on the  button. A floating navigation panel becomes available and allows you to do your actions on the navigation items, such as, opening a TSI in the workspace.

When you minimize your computer screen, the navigation panel is automatically collapsed. It returns to the previous mode when you expand it again.

The panel cannot be pinned if the screen is minimized or the screen resolution is less than 1200 pixels. In this state, the navigation panel is in the slide mode.

Accessibility

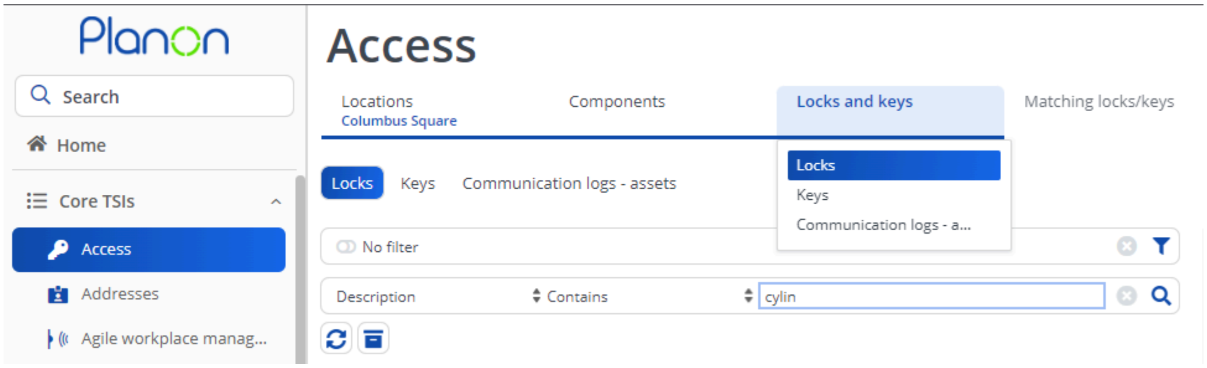
Planon is committed to making its software available to as many people as possible and subscribes to the Web Content Accessibility Guidelines.

This has resulted in a number of adjustments in navigating the software. The most important ones are listed here.

Navigation

To assist users in navigating through the application, Planon supports these features.

- Focus: The item in focus is clearly marked, by a solid block or a border



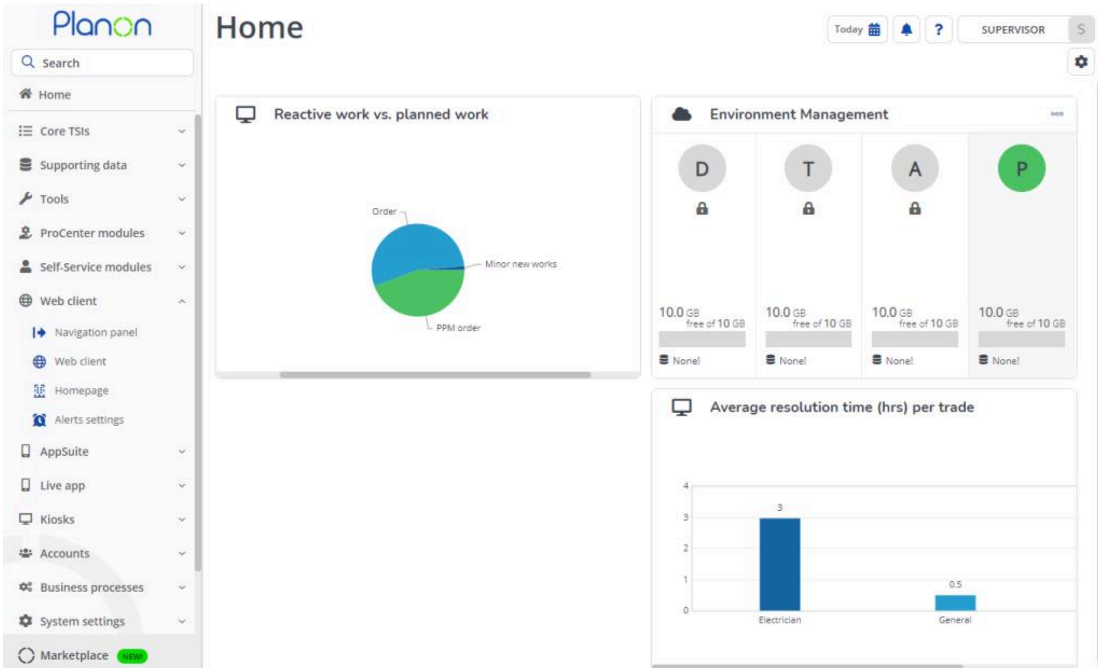
- Keyboard control:
    - TAB character moves through the application (or SHIFT+TAB to go back).
    - ENTER activates a feature or opens a menu.
    - Arrow keys navigate through a list.
- Quick jump: In the elements list, when the top node is selected, press a letter (combination) to *jump* to the location.
- Visual themes: Each user can choose a theme that provides the best possible visual experience. It is possible to create customized themes and there is a high-contrast theme.

  For more information, see System Settings > Theme.

Homepage

After logging in, the homepage is shown in the workspace.

This image displays the Homepage with several gadgets.



Gadgets

Gadgets

A gadget gives you quick access to vital information directly from your homepage. You can use the gadget library to configure the gadgets on your homepage. The library contains several predefined gadgets and allow you to customize your homepage with gadgets of your choice. Your application manager can create new gadgets if needed.

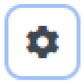
If filtering is configured for the gadgets, a bar with a generic filter icon appears on the homepage. If a gadget is actively using a filter, a yellow filter icon appears on the gadget. The search fields in the gadgets are read-only when using the generic filter. You can use a filter to get an overview for the selected gadgets based on the filter criteria.

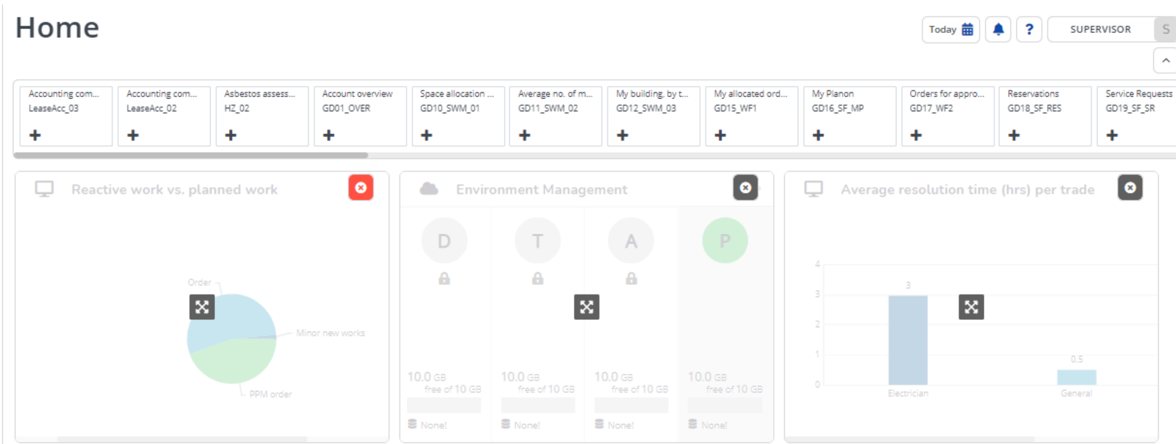
- You can select multiple values (using click selection or Shift + select) to filter on if the **In** operator is selected in the search fields. For more information, see Search block.
- For more information on configuring a generic filter, see Adding a generic filter for gadgets on the homepage.

Configuring gadgets on the home page

Configuring gadgets on the home page

Procedure

1. Click the **Edit mode**  button on the right. The gadget library appears and the existing gadgets on your homepage are unlocked.
2. The library displays all available gadgets.



3. Click on the + icon of a gadget to add it to the homepage.
4. To move the gadget around on the workspace, hold the gadget (with the four-arrowed cursor) and drag it to the required position.
5. To remove the gadget from the homepage, click the cross sign on the top right corner of the gadget.

   The gadget disappears from the homepage and moves back to the library.

6. Click the button, when you have finished configuring the homepage.

   The library is closed and the gadgets are locked on the homepage. The gadgets you selected from the gadget library are now activated.

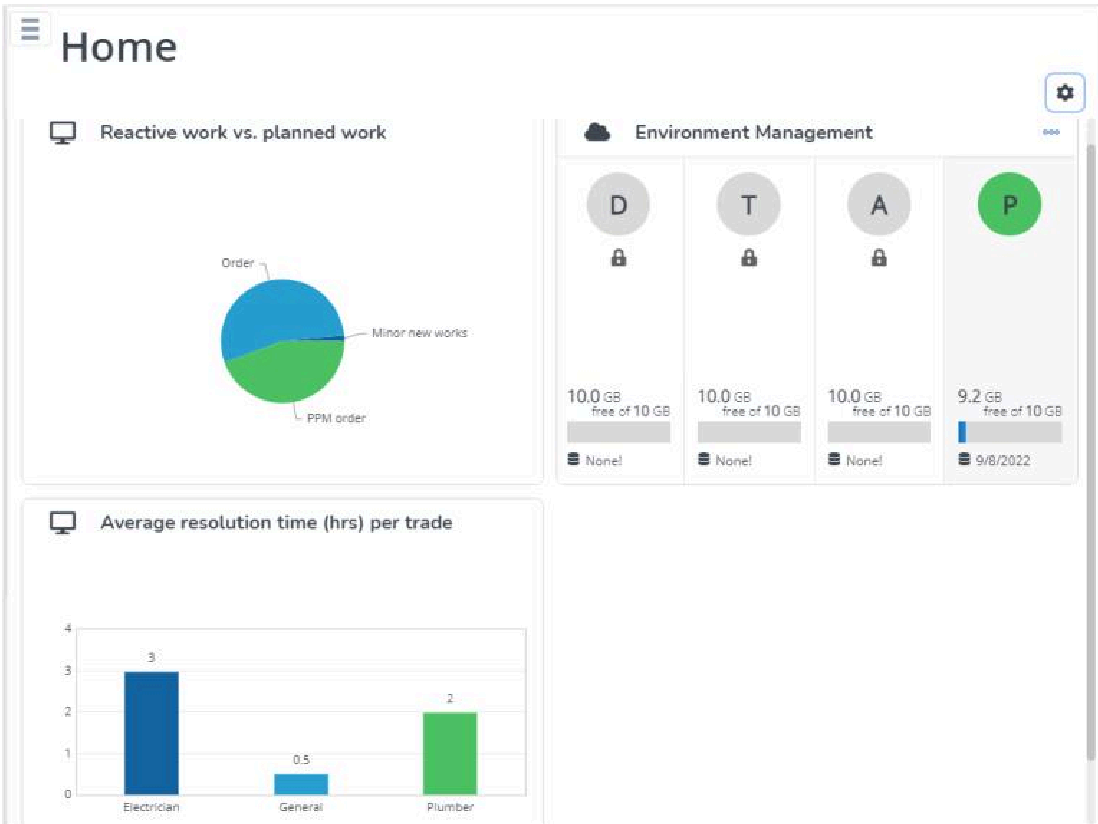
Tablet users

The Planon application offers an interface that runs on all desktops, laptops and tablets. This enables an optimal use of available space on screens with different resolutions (responsive behavior) and touch support on tablets.

The Planon application is built for the major mobile platforms such as Android, iOS and Windows.

Users such as field engineers, managers and self-service users can use Planon application on tablets to access and update information on the go.

The responsive Planon application runs on screens with a screen resolution higher than 960 px by 540 px (qHD resolution) and a minimum size of 7.9 inches.



For more detailed specifications and limitations for tablets, see Supported Configurations.

Getting started
Web Client menu
Basic navigation on a tablet

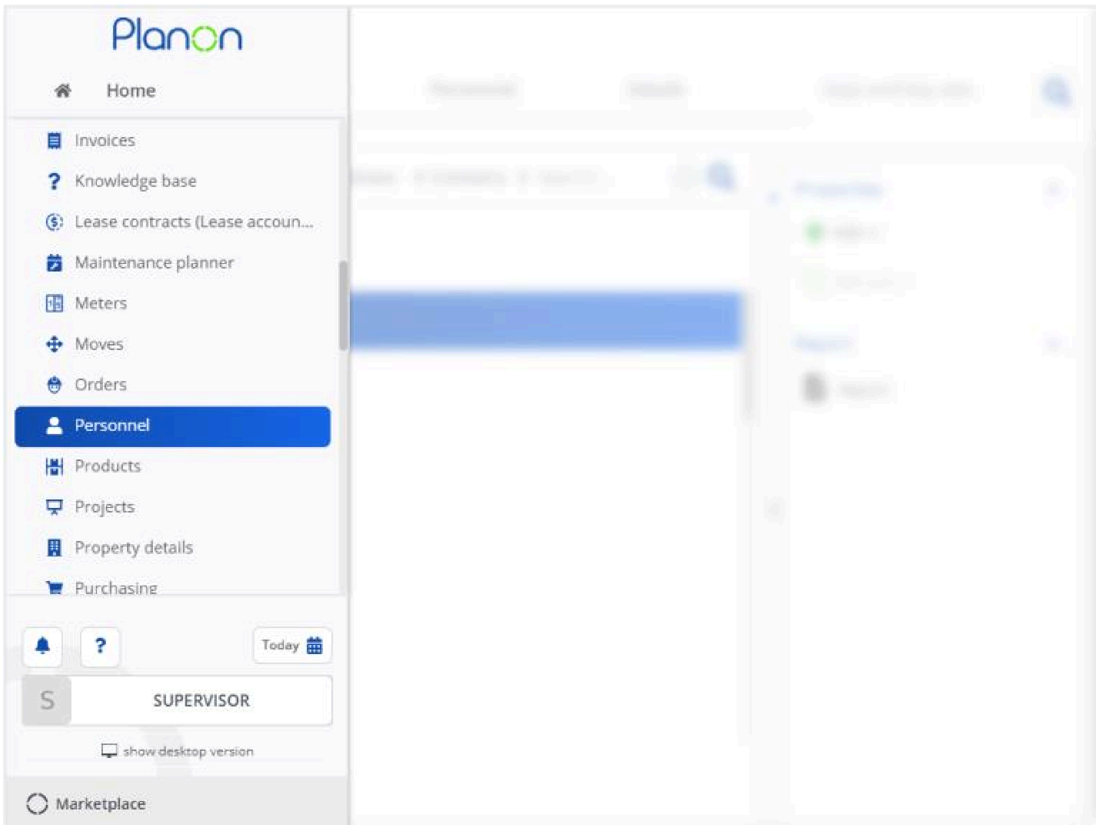
Getting started

Log in to Planon application on a tablet.

After the login, the homepage of the Planon application is shown full screen.

Web Client menu

The Web Client menu integrates the navigation panel and the ribbon into a single menu. It opens the navigation panel and the general functions. The Web Client menu appears as an overlay on the workspace.



Navigation panel on a tablet

- The navigation panel is shown when you open the Web Client menu.
- Tap a navigation group and then a navigation item. The corresponding module opens in the workspace and then the Web Client menu is hidden.

General functions

General functions such as user account details, the alarms button and other details are shown at the bottom of the Web Client menu. For more information about the general functions, see Ribbon > User account details

Show desktop version

Clicking this button allows you to open the desktop version of the Web Client

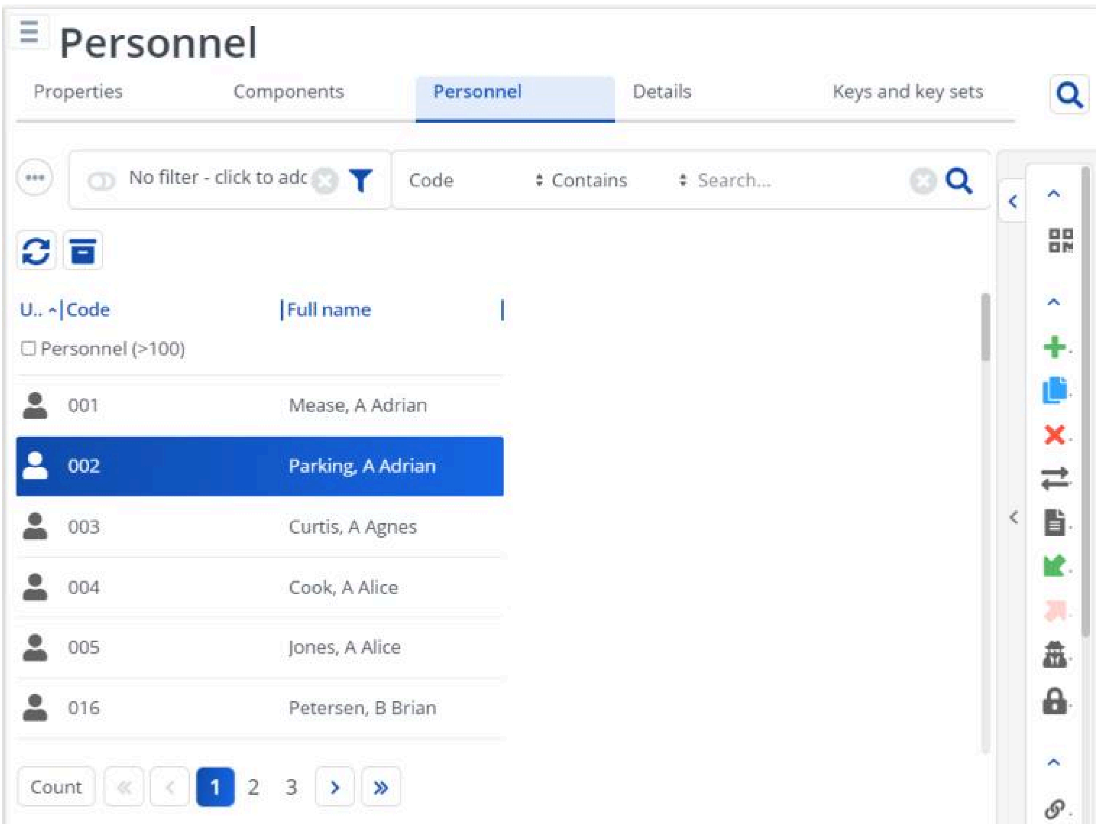
Basic navigation on a tablet

When you open a web client module on a tablet:

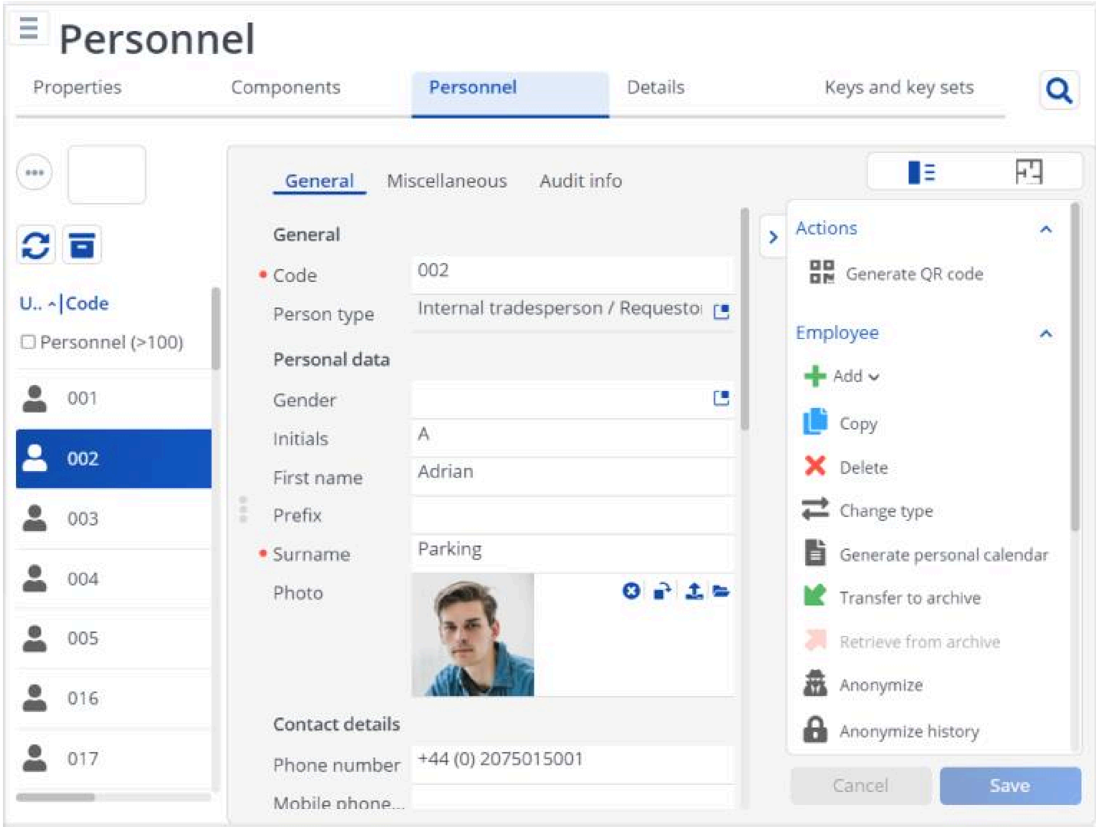
- the elements list is shown
- the data panel is hidden
- the action panel is shown minimized
- the quick search and filter panels are available

All these panels can be expanded and collapsed to optimize the available space on the screen. These user settings are stored for every selection level and step. Your settings are retained when you log in next time.

This image displays a module on a tablet with only the elements panel expanded. The action panel is collapsed, just displaying the icons.



This image displays a module with all three panels (elements panel, data panel and action panel) expanded on a tablet.



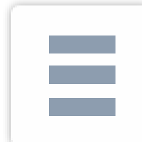
Elements panel on a tablet
Data panel on a tablet
Action panel on a tablet

Elements panel on a tablet

The elements panel appears, when you open a Web Client module on a tablet.

To view an element's details:

- Tap once to select the element. It allows you to perform an action, such as copy, link or change status.
- Tap again on the selected element to open the details in the data panel.

The element list toolbar can also be expanded and collapsed. Tap the  button to toggle the tool bar.

For more features of the elements panel, see Elements panel.

Warning Multiple selection of elements is not supported on tablets.

Data panel on a tablet

You can expand and collapse the data panel using the buttons on the center-left of the data panel. On the data panel, you can view/modify data. The keyboard on the tablet becomes available, if you want to add/change information on the data panel.

When the data panel is expanded, the quick search and the filter panel are minimized and the elements list is minimized.

The quick search and filter show a color if the filter is active. Click on the panel to access the quick search and the filter bar. At this moment, the data panel will be collapsed and the elements panel will be expanded.

For more features of the data panel, see Data panel.

Action panel on a tablet

You can expand and collapse the action panel using the buttons on the top-left of the action panel. Collapse the action panel for a full view of the data panel. When the action panel is collapsed, only the icons corresponding to the actions are visible.

For more information on actions, see Action panel.

Standard features

This chapter describes the standard features available across all the TSIs of Planon .

Planon supports working with several keyboard shortcut keys to perform certain actions in the application.

Tip For more information, see Shortcut keys.

Shortcut keys

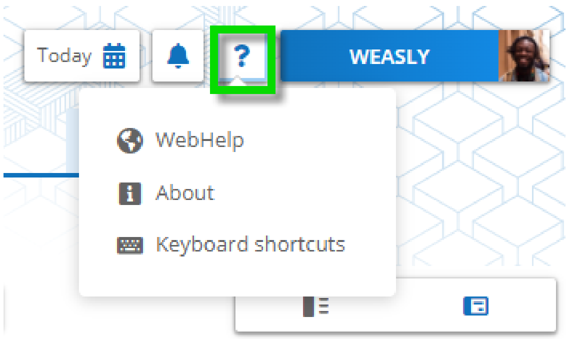
This topic helps you to know how to access the keyboard shortcut keys available in the application.

Procedure

To access the keyboard shortcut keys:

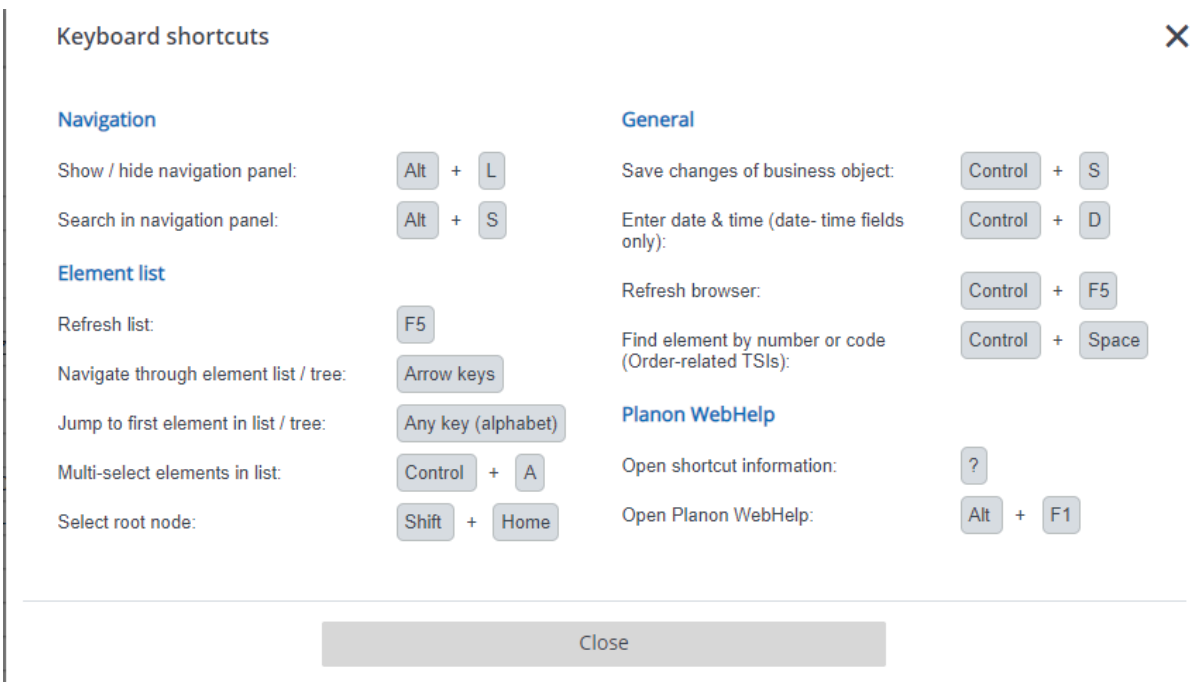
1. Click the help icon (?) on the top right corner .

   These options appear.



2. Click **Keyboard Shortcuts** from the list.

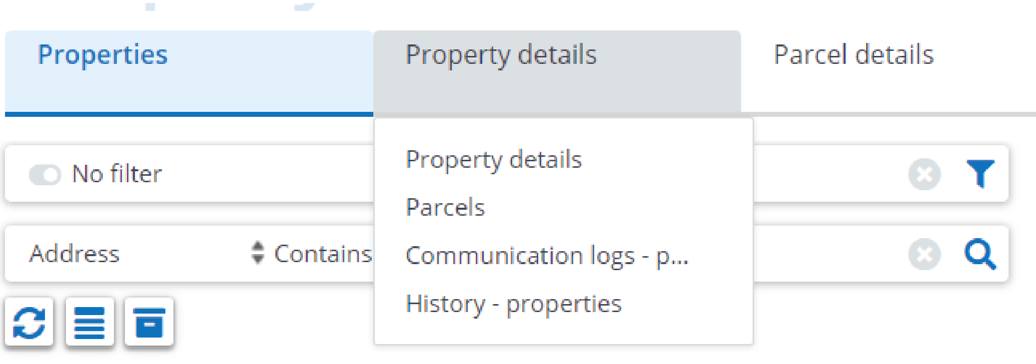
   The **Keyboard shortcuts** page appears.



Selection bar

The selection bar displays all the available selection levels of the TSI you have currently selected. On selecting a selection level, the corresponding selection steps appear.

When you position the cursor over a selection level, a list of selection steps on that level appear. You can also jump to a selection step by selecting it from this list. The currently active step on that level is highlighted in the list.



The selections steps are displayed only if there are more than one selection steps.

By choosing elements on each selection level, you can also pre-select and have only the required data shown.

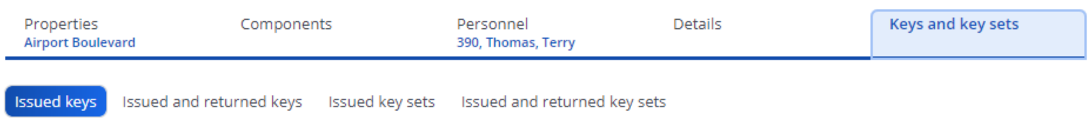
Elements panel

In Planon Web Client, the elements panel displays elements relevant to the TSI/step you are in. The elements differ with every TSI you open, and the selection levels you choose subsequently. An element can be a property, an asset, a contract, or a person.

An element that has been selected in the elements list is called an active element.

The column headers of the elements list remains visible while you scroll through the list. This functionality is supported in all browsers except in Internet Explorer 11.

When you move from one selection level to another, the selected element name in the previous level appears below the level name. If the text is too long, the full text is given in a tool tip.



The functions to influence the element list/tree view as a whole are placed in a toolbar above the element list. Using these actions, you can refresh the elements list, show archived items, and show list/tree view. When you use the **Show archived items** button, it changes color. Only the relevant functions for the elements panel that you have selected are shown. For example, you might find more order related actions in **Orders**.

You can do these in the elements panel:

- Resize the columns, by dragging the column header handles.
- Show/hide columns by right-clicking the column header and selecting the relevant options in the sub menu.
- Move viewing area up, down, left, or right by using the horizontal and vertical scroll bars.
- You can view the elements list in a tree or list view.

The selected view per TSI is remembered even after logging out.

Element hierarchy
Footer bar

Element hierarchy

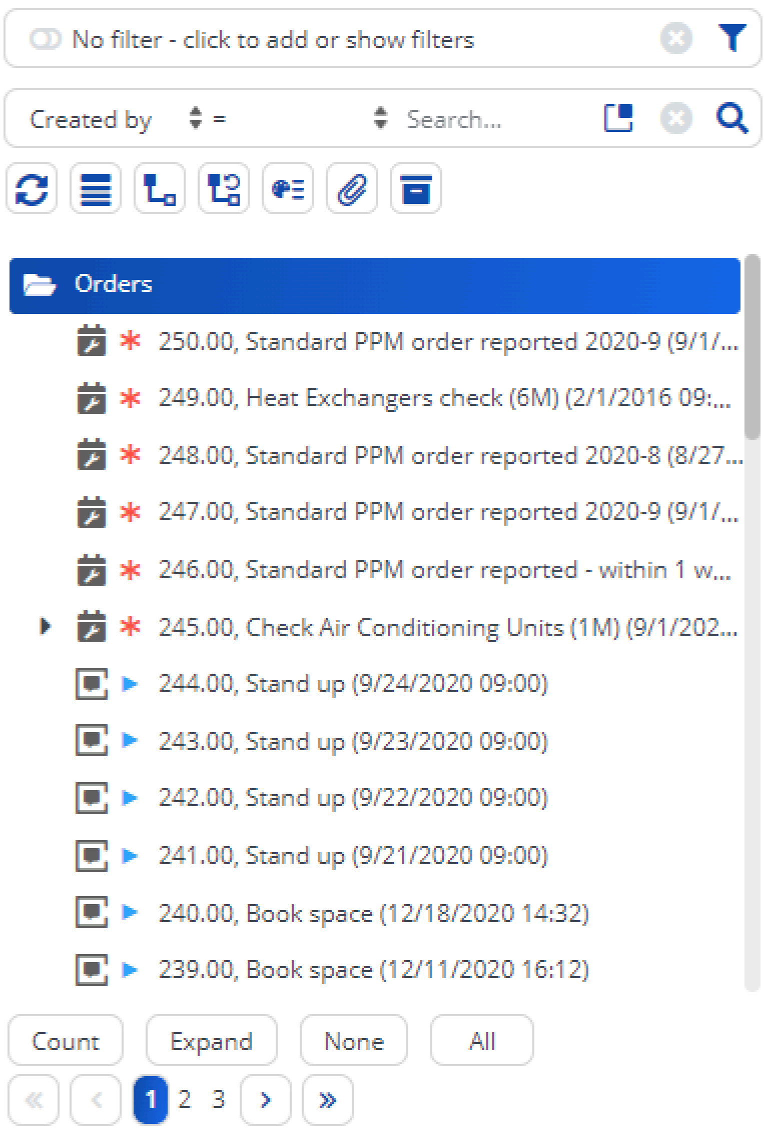
These are the element types in *Planon ProCenter*.

- Hierarchical elements
- Simple elements

Hierarchical elements are divided into sub elements.
For example, Department.

A simple element cannot be subdivided.
For example, Person.

The hierarchical elements in the elements list can be collapsed or expanded. The symbol in front of a hierarchical element's name indicates the presence of sub elements.



It is possible that sub elements inherit values from the parent element. The inherited data overwrites all data that will be automatically specified as a result of selections made on previous selection levels.

Footer bar

The footer bar has these functions.

- **Count** - Displays the total number of elements in the list.
- **Expand** - Expands all the sub elements in the element list.
- **All** - Selects all the elements in the element list.
- **None** - Deselects the selected elements.

Any action that refreshes the element list will collapse the expanded page.

The footer bar also displays pagination. It enables you to navigate between pages if the elements list is divided into multiple pages. Click the arrow buttons to go to the first, previous and last page or click the numbers to go to a specific page.

If your elements panel consists of a very large data set, please note that clicking the >> arrow to jump to the last page may take some time.

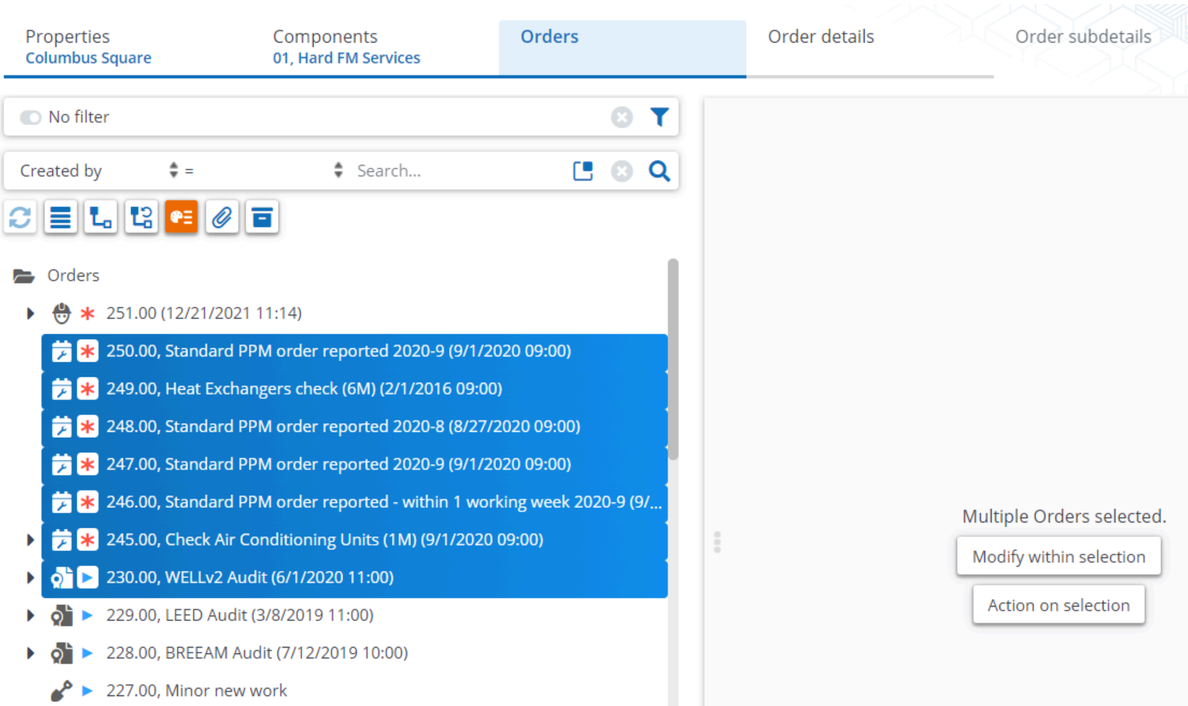
Action on selection

The **Action on selection** option allows you to perform a certain action or status transition for multiple elements at the same time. This option becomes available in the data panel when you select multiple elements in a TSI.

You can apply action on selection to elements of various system or user-defined types such as main/sub work orders, reservations, and so on.

Procedure

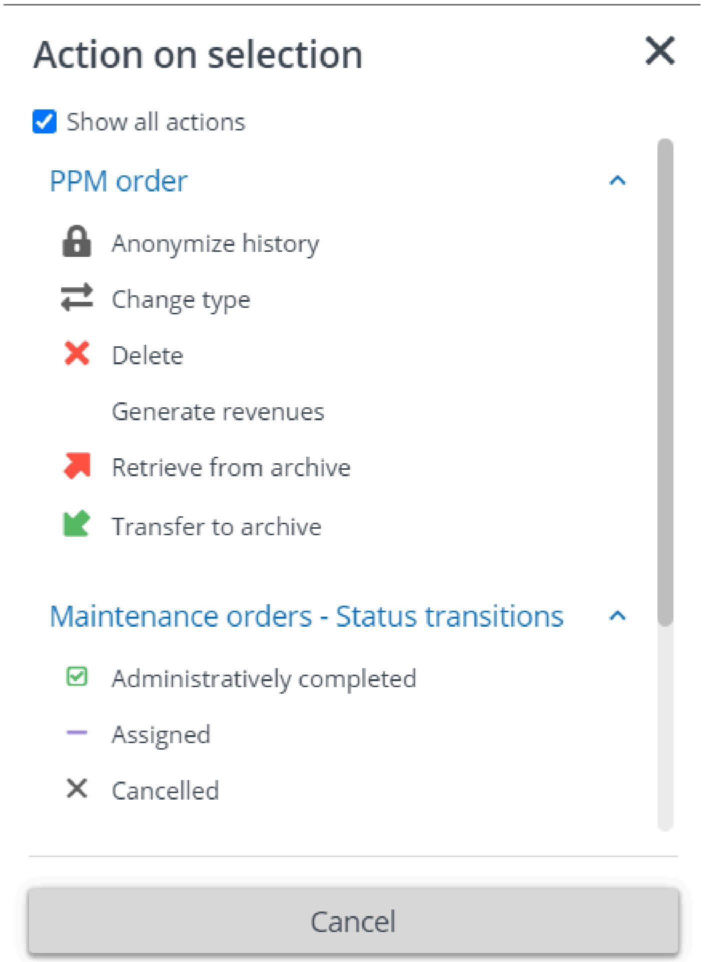
1. Select multiple elements to which you want to apply the action or status transition.



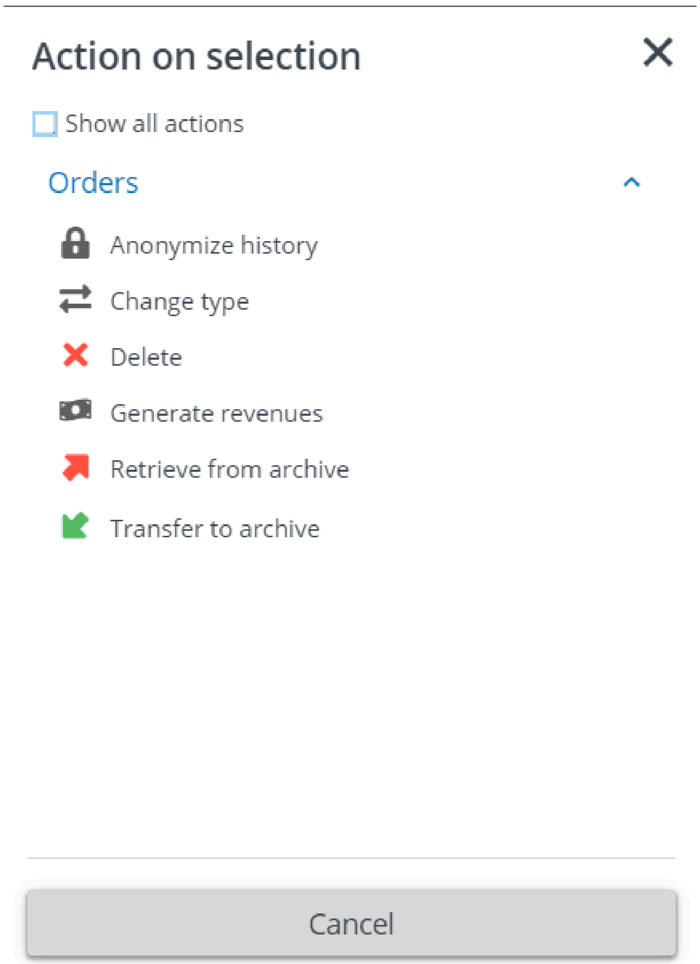
2. On the data panel, click **Action on selection**.

   The **Action on selection** dialog box appears and displays relevant actions available for the selected elements.

   In the dialog box, when selecting the **Show all actions** check box, all actions/status transitions available will be shown (including those that can be applied to some of the other types).



If you clear the **Show all actions** check box, only the actions available to all types in the selection will be displayed.



4. Select the action or status transition that you want to apply to the selected elements.

> Though some actions are not present in a TSI due to authorization, they may be displayed in the **Action on selection** dialog box, for the selected list.

A Question dialog box appears.

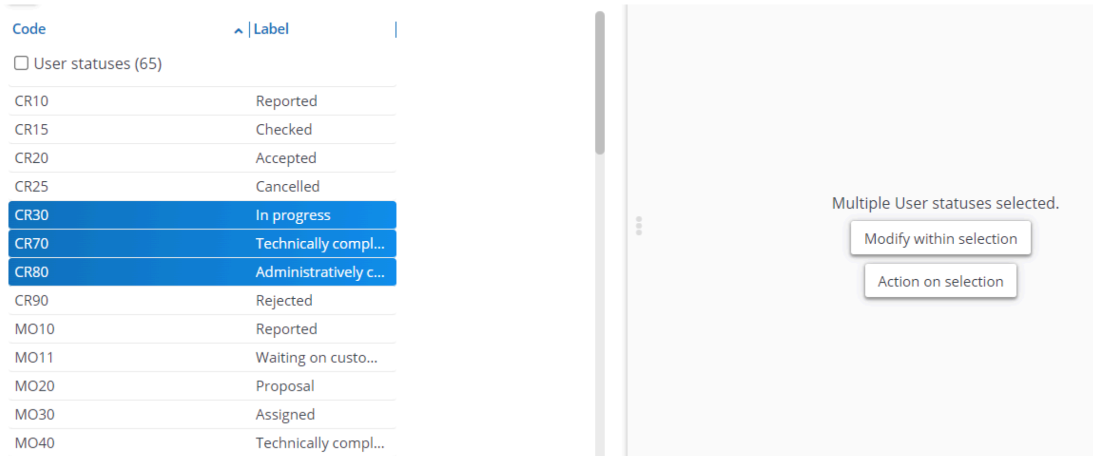
5. Click **OK** to continue. The items are processed, as displayed by a progress indicator.

   A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

   All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process, or select the **Select all** check box and then click **Process selection**.

Modify within selection

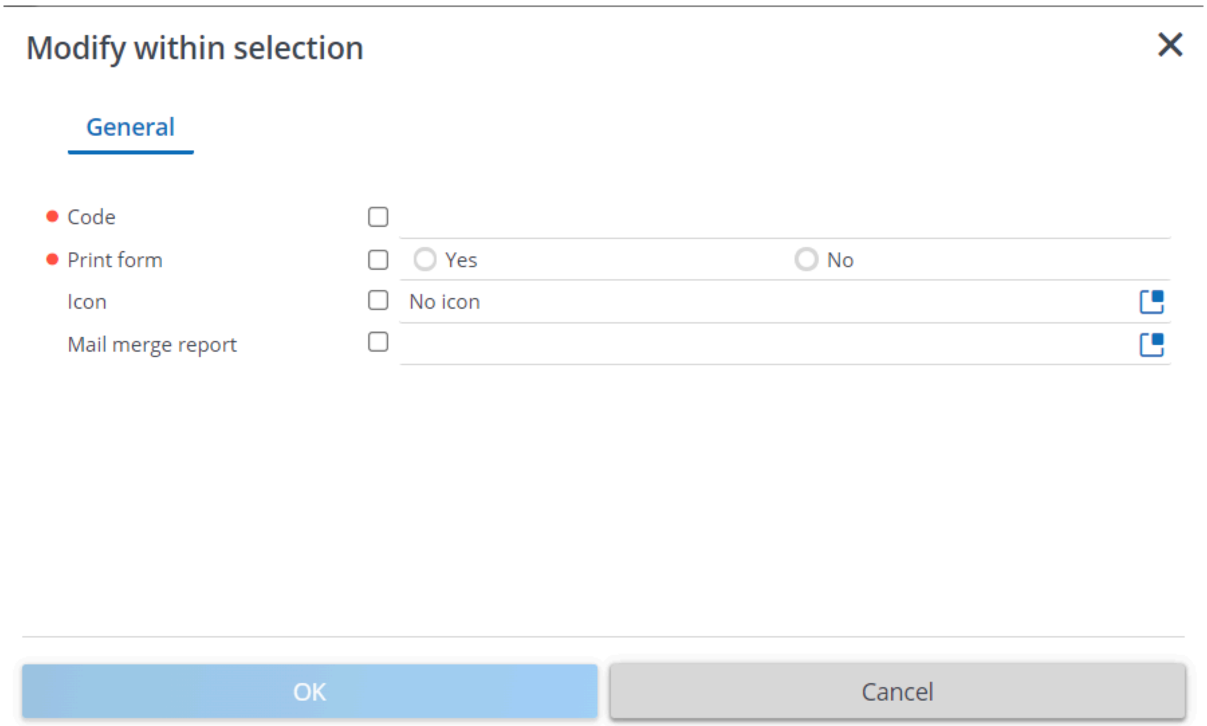
The **Modify within selection** option allows you to change the value of a field for multiple elements at the same time. This option becomes available in the data panel when you select multiple elements in a selection level in a TSI. You can change the values of all fields.



Warning To use **Modify within selection**, you must select elements of a single type. If a selection contains elements of different types (for example, a work order and a reservation), **Modify within selection** is not possible.

Procedure

1. Select the elements for which you want to change the field value. For example, the selected personnel have moved to another department and therefore you have to change the Department and Work address fields of these persons.
2. On the data panel, click **Modify within selection**.



3. Select the check box(es) of the field(s) you want to modify and enter the values in the selected fields.

   Warning

   It is possible to clear a field for multiple-selected elements. If you want to clear a field for multiple-selected elements, you have to select the relevant check box and leave the field empty.

   All fields whose check boxes are selected and in which no values are entered, will be cleared.

4. Click **OK** to proceed.

   The **Question** dialog box appears.

5. Click **OK**.

   A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

   All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process, or select the **Select all** check box and then click **Process selection**.

Select all

If you want to select all items in the elements list at once, you can click **All** at the bottom of the page.

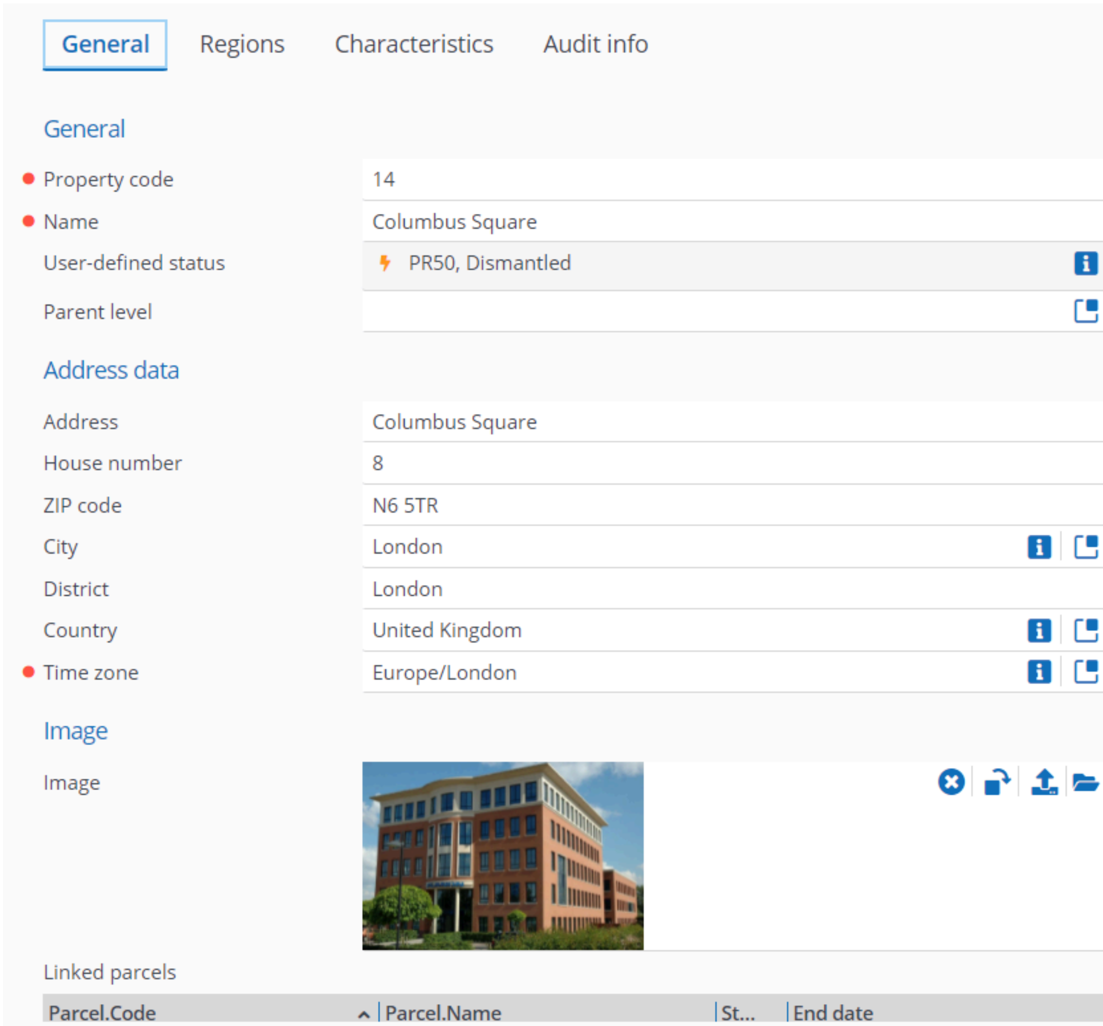
- When you click **All** or press CTRL+A, the root displays an *All selected* status.
- You can click the **Close** button to cancel the selection.
- While **Select all** is active, clicking in the list to select one or more specific items cancels the *All selected* status.

Select all does not act as a filter when navigating to the next level. It works like selecting the root node and then navigating to the next level. For some TSIs, such as Work Orders , you need to specify a filter to be able to navigate to the next level.

Data panel

The data panel displays the details of the selected element in the elements list.

In this example, you can see property data.

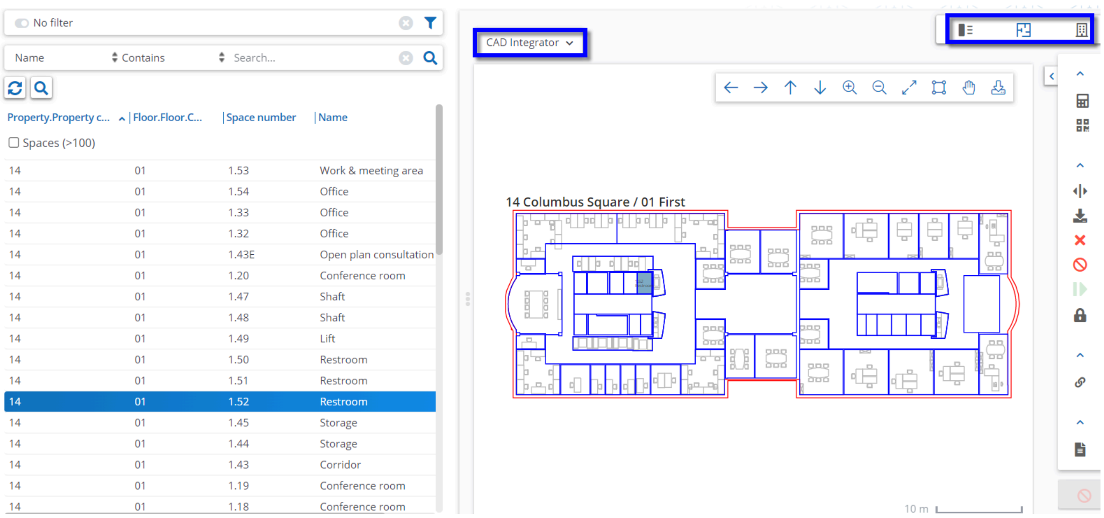


Detailed information about the selected element is grouped by headers in the data panel and the information is spread over different tabs. For example, **General** > **Address data** This allows you to find the information you need about the selected element easily.

On the data panel, fields marked with ● icon are mandatory fields. These fields must be filled in. If not, the changes cannot be saved.

The changes you made to the element data in the data panel can be saved or canceled.

Some TSIs can have different data views. You can switch views on the upper right, just below the selection levels and steps. For example, **Data view** and **CAD Integrator**.

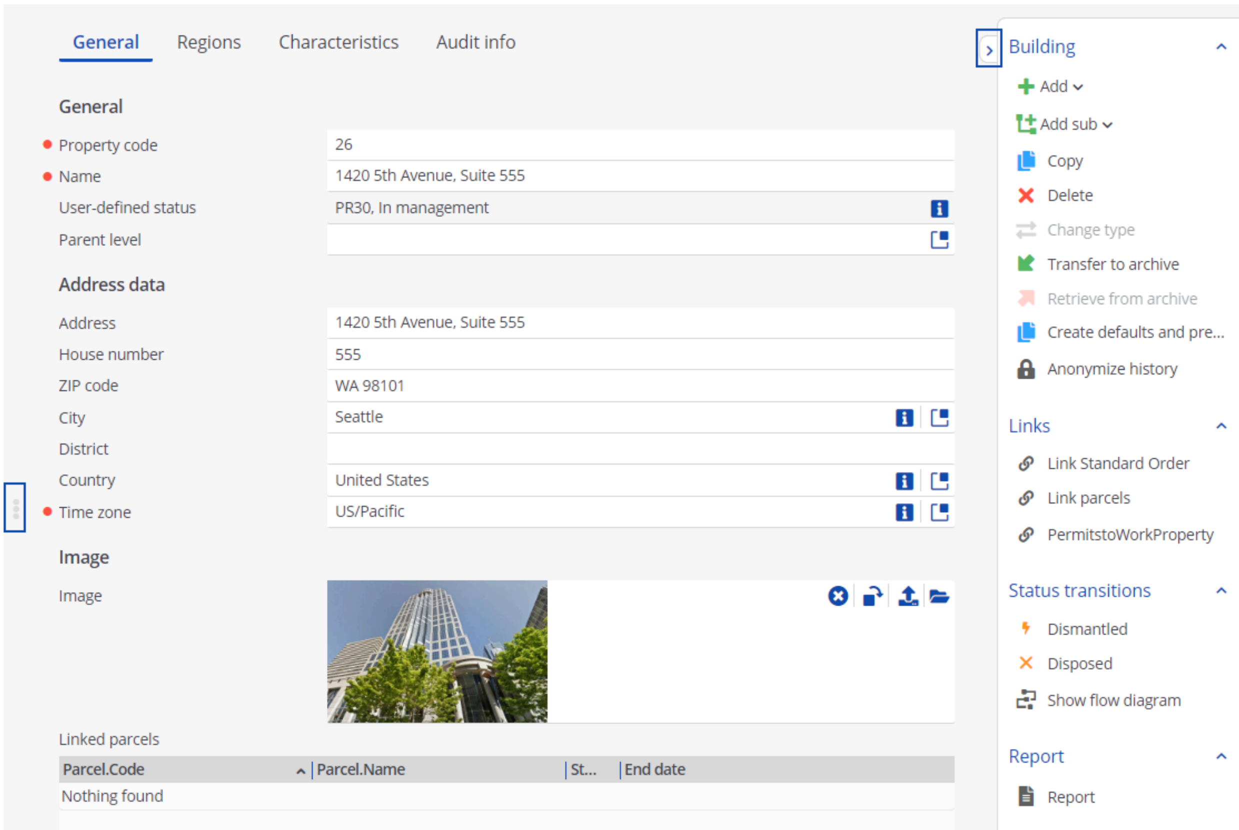


Panel resizing

Panel resizing

It is possible to resize the width of the data panel. The size of the data panel is stored for each step.

Panels have a minimum size and are dependent on the screen resolution. If you use a computer with smaller screen resolution or if the screen is minimized, the data panel size will remain the same but the elements panel will be resized. The handles shown in the image below allows you to resize the panel.



Uploading a file

On the data panel, fields with the icon indicate that you can upload files into Planon. Upload enables you to add additional related information in any file format such as pdf, jpg or docx. The procedure to upload a file is similar across Planon.

To upload a file

Procedure

1. Go to the field with the **Upload** option.
2. In the **Upload** field, you can drag a file directly from your local machine or browse to and select a file by clicking the **Upload** icon.

   > You can drag only one image at a time and only from your local machine.

3. If you click the **Upload** icon, an **Upload file** dialog box will appear.
4. Click the **Choose file** button to browse and select a file from your local drive.
5. Click **OK**.

   The file is now uploaded to the WebDAV location specified in System Settings.

After upload,

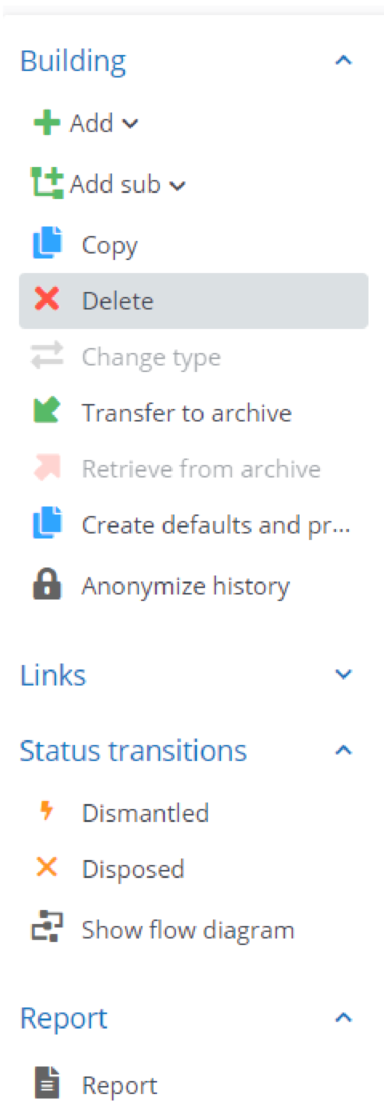
- For image type fields, the image is directly displayed in the data panel. You can use the **Clear / X** option to remove it. However, it will still reside in the WebDAV location.
- For document type fields, the **View** button is displayed. Depending on your browser settings, this button enables you to download or view the file.

Action panel

The action panel is available on the right and consists of all the actions that can be performed on a selected element.

Common actions available are **Add/Add sub, Copy and Delete**. The actions you see on the actions panel may differ and depend on the TSI and the business object you select.

This image displays the actions available in the TSIs.



Copy
Delete
Change type
View status flow

Copy

Copying an element is possible, if you have the appropriate authorization. When an element is copied, most corresponding data is copied, except the data that must be unique like the element code.

Delete

Deleting an element is possible, if you have the appropriate authorization.
Planon ProCenter asks you for a confirmation before an element is actually deleted.

Change type

Given the appropriate authorization, you can change the type of some elements.

For example, if you have to change the property type from *Wing*, to *Complex*, it can be done by using the **Change type** action.

Change type is only possible:

- For business objects for which it is possible to create user-defined business objects.
- If the action is available on the action panel.
- If both business objects have the initial (default) status.

For more information, see Field definer .

View status flow

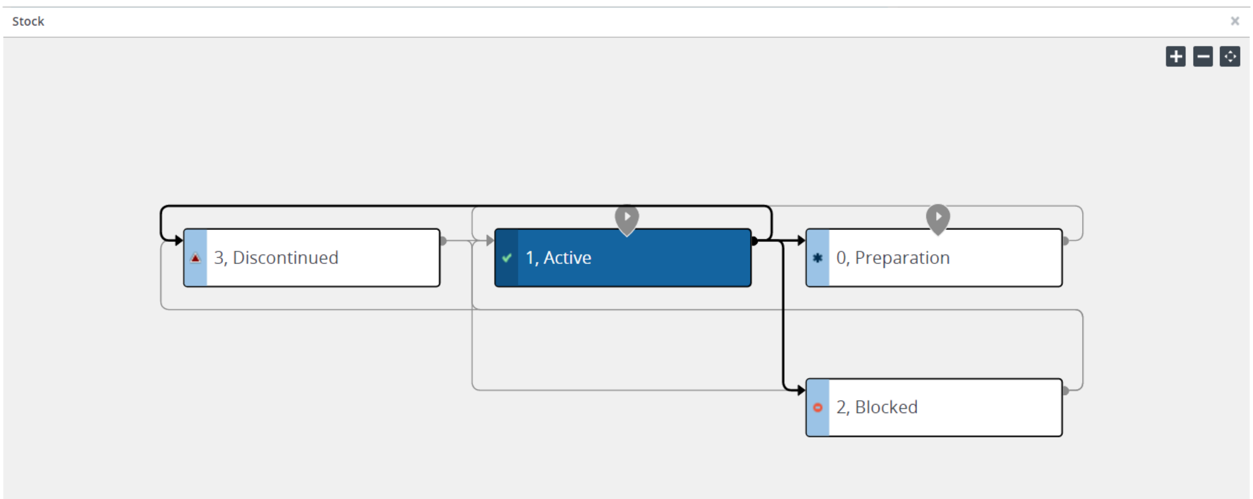
In Planon Web Client, you can view the complete status flow and the possible status transitions of elements such as, Reservations, Orders, Visitors, Contracts and so on.

The status flow diagram displays the current status and the possible transitions of a selected element. You can also view the initial status(es) and the status icons. The three buttons on the top right of the panel allow you to zoom in, zoom out and to perform a zoom-to-fit of the flow diagram.

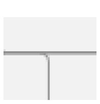
To view status flow of an element:

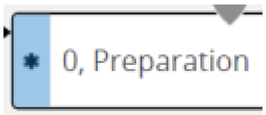
- Select an element in the element list panel.
- Click **Show Status flow** on the action panel.

The Status flow diagram appears on the view panel.



See this table, for a description of the components of the status flow diagram.

Components	Description
	The blue block indicates the current status of the element.
	The black arrow in the status flow indicates the current status transition. However, the grey arrows indicate possible status transitions of the selected element.
	The Grey lines indicate transitions that are currently not possible within the status flow.
	The bend in the line indicates from where the transition is coming.

Components	Description
	The blue bar in the status flow block displays the status icon. Here, the star indicates the **Preparation** status.
	This is the initial status marker. An element can have multiple initial statuses in a flow. You can start the element from any of these initial statuses.

Searching / filtering

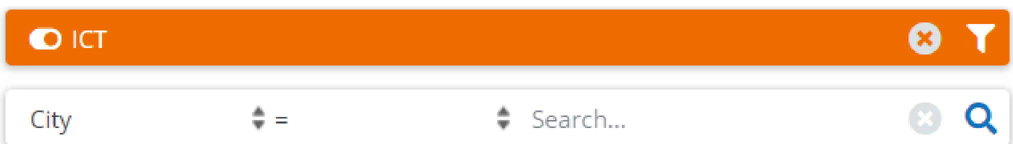
In Planon Web Client, searching can be done in various ways.

Search: This button is available at the top right of the screen and it provides a quick access for searching. Note that this feature is available only in some modules.

When you use this search option, it takes priority over an existing filter. Clicking the **Refresh** button will display the filter results again.

Use CTRL+space to search for an element.

Filter and search bar



The filter and search bars are available above the element list. You can define a search query using the search bar and then display data that is only relevant to you. The available search possibilities depend on the element you are currently working with.

You can use one specific field to search on. If required, you can also select a different search field, select an operator and specify a value. The following table describes the search operators in detail.

Search operators
Filter types
Using filters
Date-time operators
Relative filters using macros
Editing a filter
Copying a filter
Previewing changes in the existing filter
Deleting a filter

Search operators

Operator	Description
<, ≤, =, ≥, > <>, <> or empty	Logical operators that compare the search field with the search value.
%searchkey%	Operator that enables you to search for entries containing (parts of) the specific word (search key). You can use multiple search keys to fine-tune your result.
_	The underscore can be used as a wildcard for a single character. H_t finds: Hat, Hut, Hit.
Contains Does not contain	Operators that search for the presence of the search value in the search field.
Contains a value Does not contain a value	Operators that search for the presence of any value in the search field.
Starts with Does not start with Does not start with or is empty	Operators that search for the presence of the search value at the beginning of the search field.
Ends with Does not end with Does not end with or is empty	Operators that search for the presence of the search value at the end of the search field.
In Not in Not in or empty	Operators that search for the presence of a set of search values in the search field.
Between	Operators that search for a range of values in the search field. It includes both the start and end values.

For orders, using the search operator **Between** is not possible for alphanumeric fields containing only digits because it throws off sorting. To work around this issue, do not filter on **Number**, but add **No.** (SysOrderID) to the layout to filter on the (main) order.

Filter types

The following filters are used in Planon ProCenter.

- **Personal filters**: Personal filters for personal use can be added, managed and activated by the end user.
- **Temporary filter**: As the name suggests, a temporary filter is created for a current search and disappears when you click on any other filter. If you give a name to a temporary filter and save it, it becomes a personal filter.

- **Permanent filter**: A filter created with search criteria for a quick data selection in the elements list. Typically, your Application manager manages permanent filters.

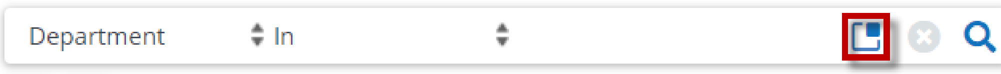
Using search operators
Examples of using multiple search operators

Using search operators

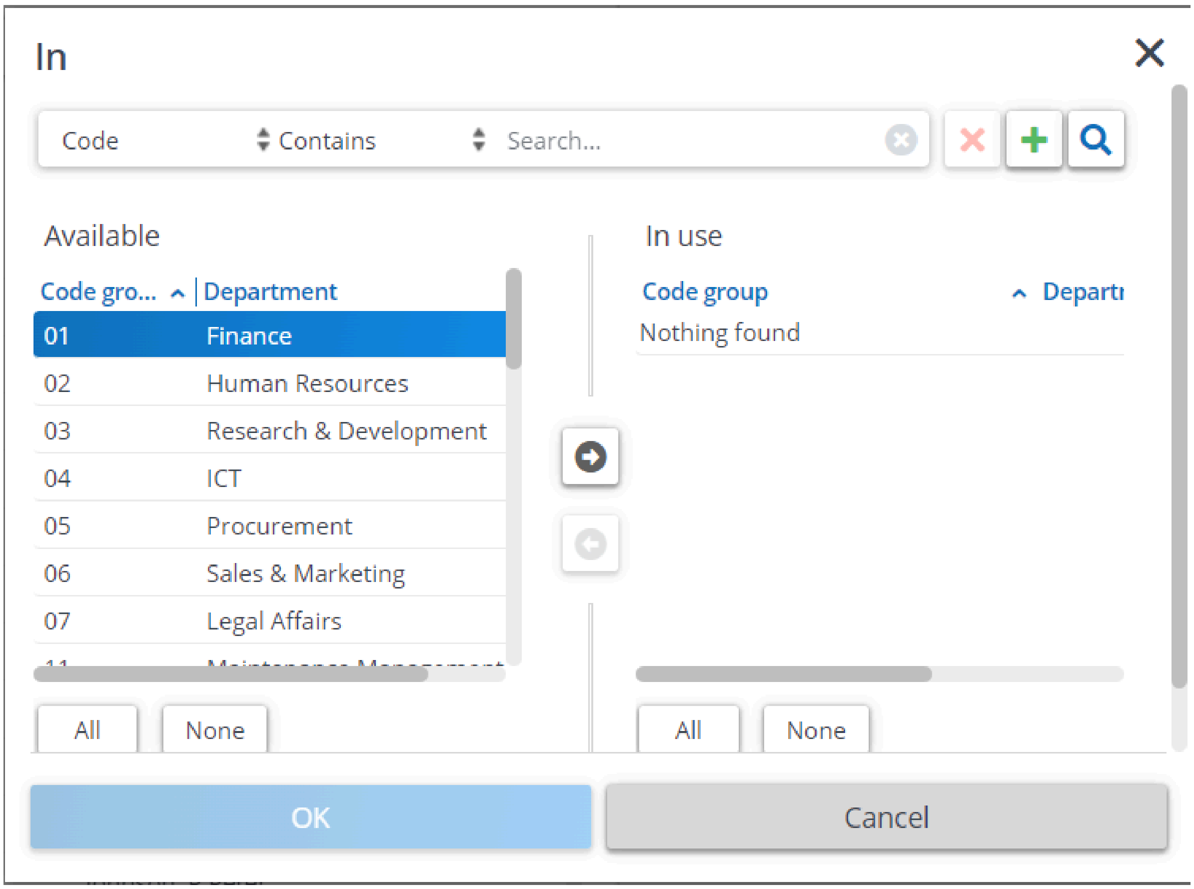
The following is an example for using the **In** operator in the Personnel TSI. Go to **Personnel**.

Procedure

1. In the search bar select **Department**.
2. In the next column, select the **In** operator.



Click the button to open the following dialog box.



Select the departments you want to include in your selection, move them to the **In use** section and click **OK**.

All persons belonging to the Central staff and Finance department are now displayed.

Warning Contrary to filters (refer to Using filters) it is not possible to save search queries that you perform via the search bar.
In addition, when performing a search request via the search bar, you can only select from a limited number of search fields. With filters, you can search on almost any field of an element.

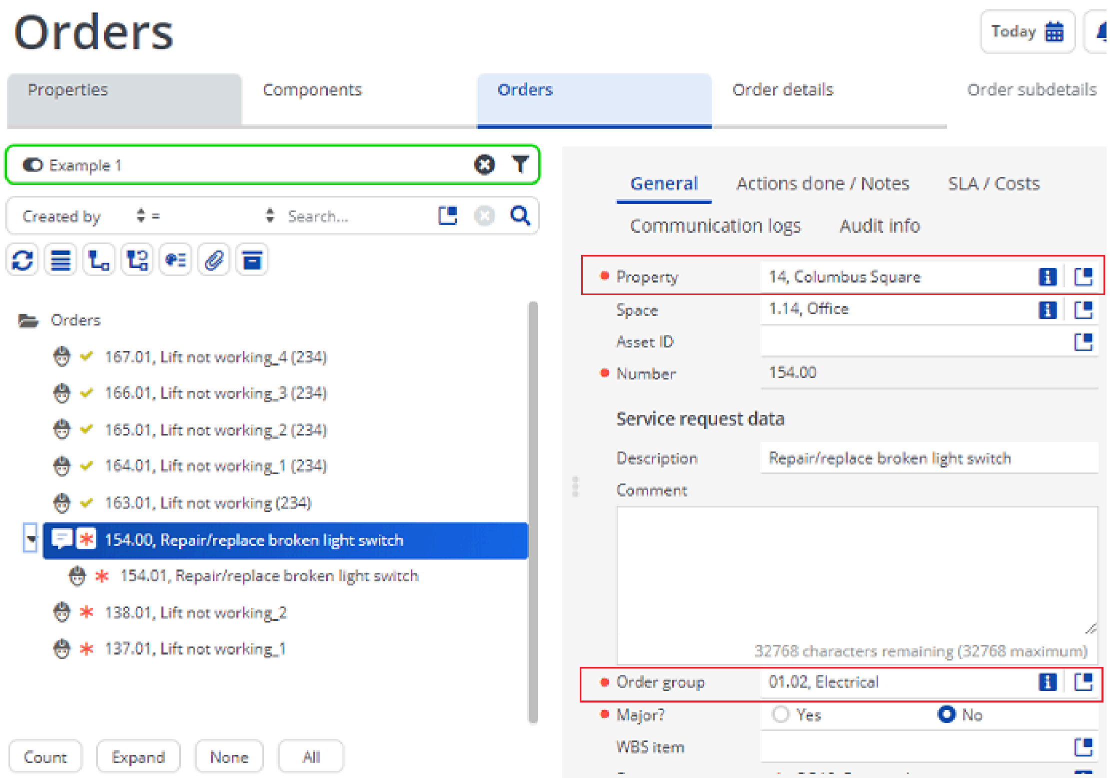
Examples of using multiple search operators

Order **154** contains **Order group 01.02** and **Property 14**. The following are the examples displaying the output when using different search operators with an AND/OR filter:

Example 1:

Filter on: Order Group = 01.02, Electrical **AND** Property = 14, Columbus square.

Result: Order 154 is shown in the elements list.

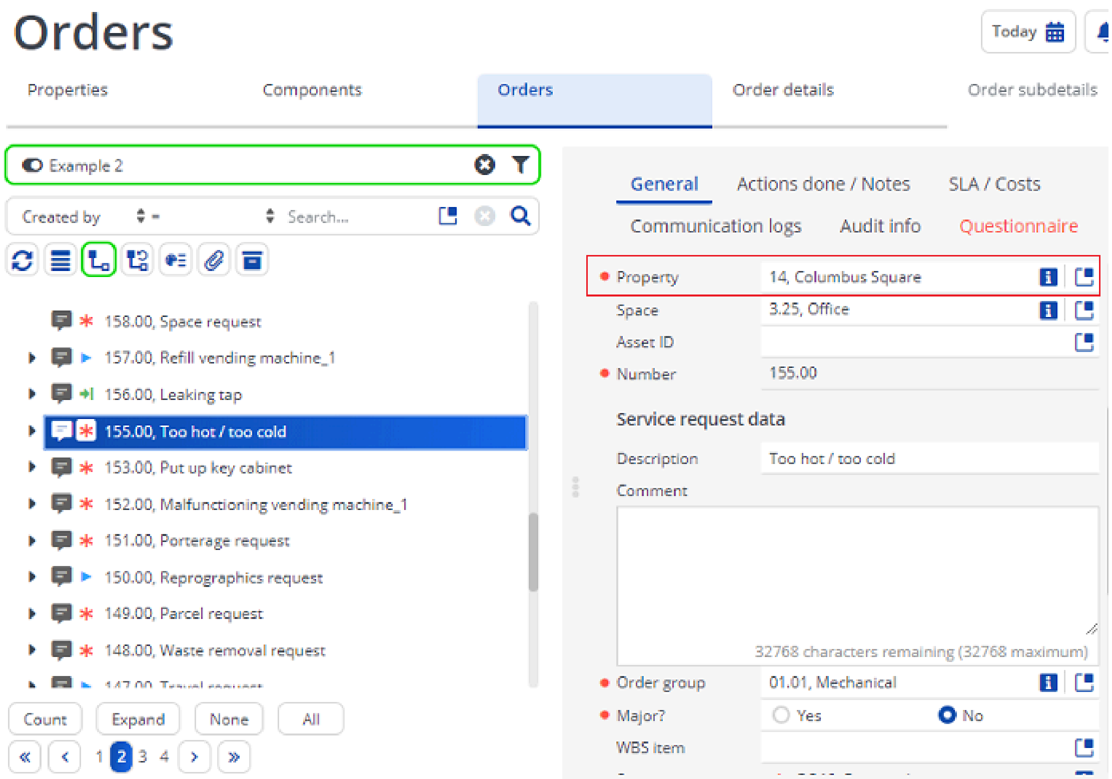


Example 2:

Filter on: Order group Not In or empty 01.02, Electrical **AND** Property = 14, Columbus square.

Result: Order 154 is not shown in the elements list.

Order 154 belongs to Order group 01.02 and Property 14. Here one of the filter specifies Not In (Order group 01.02) or empty, Order 154 is not listed in the set of records displayed although it belongs to Property 14. As we used **AND** filter the result should satisfy both statements(filters).

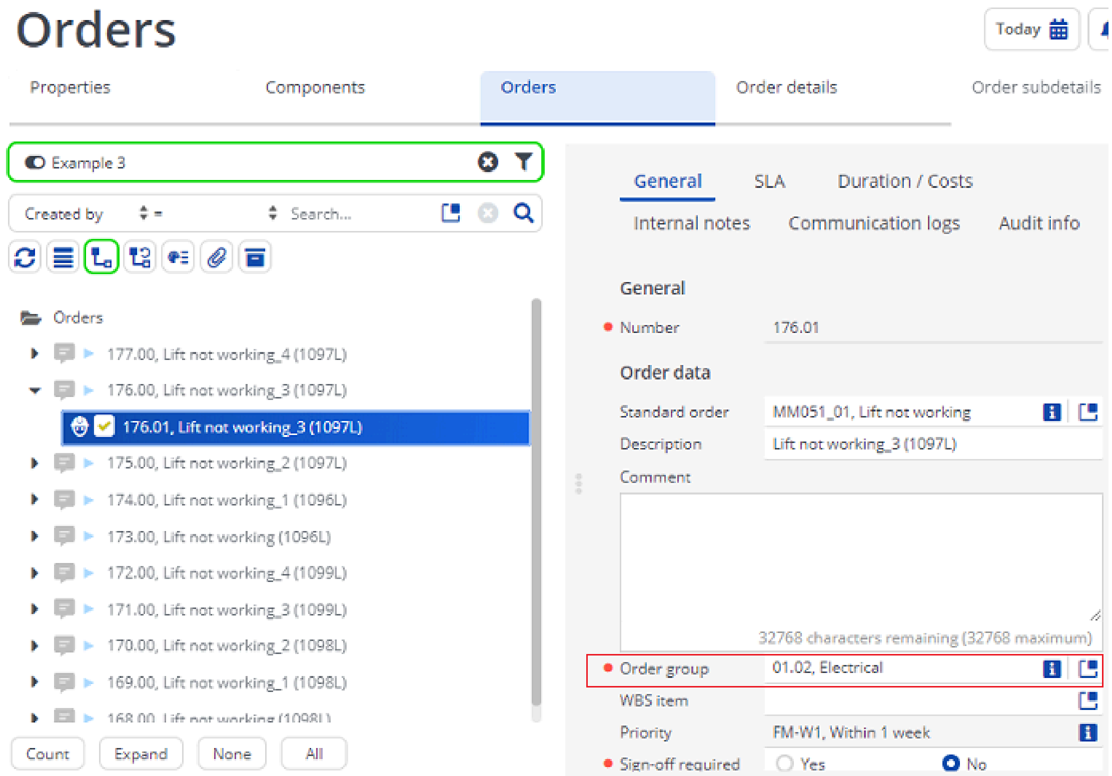


Example 3:

Filter on: Order Group = 01.02, Electrical **AND** Property Not In or Empty 14, Columbus square.

Result: Order 154 is not shown in the elements list.

The orders shown on the elements list are main orders, however, they are grayed out and their sub-orders show the correct filter data. The records displayed take into account the **Show related work orders** button.

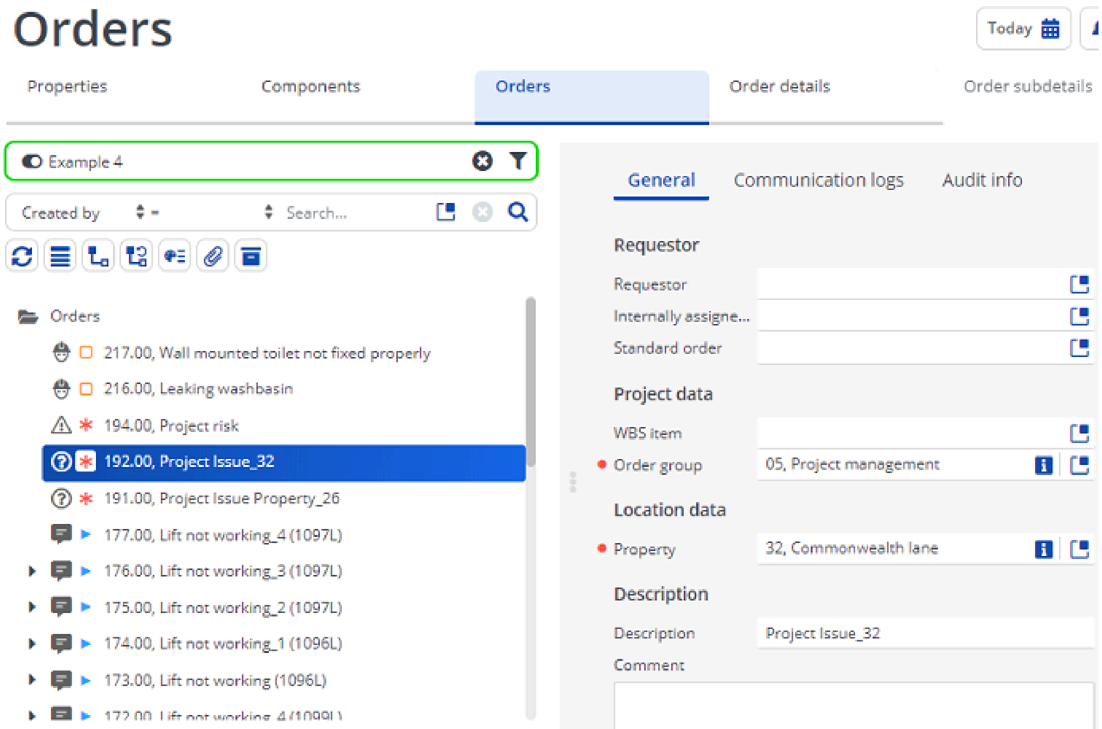


Example 4:

Filter on: Order group Not In or Empty 01.02, Electrical **AND** Property Not In or Empty 14, Columbus square.

Result: You see that none of the displayed records show for Property 14, and the order group 01.02, Electrical.

However, as this is an **AND** statement, it should have removed only those records that include both statements in the filter.



The following table clarifies the reason for output records when using **AND/OR** filters for **Not in or empty** search operators

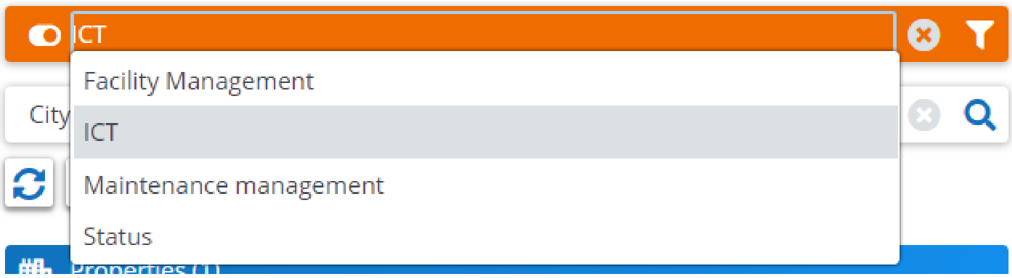
Number of records	Order group	Property	Reason for resulted record
Below are the set of records we have			
1	01.03	14	
2	01.03	15	
3	01.02	14	
4	01.02	15	
5		14	
6		15	
7	01.02		
8	01.03		
Filter on: Order group *Not In or Empty* 01.02, Electrical **AND** Property *Not In or Empty* 14, Columbus square			
2	01.03	15	Not in both (Order group 01.02 and Property 14)
6		15	Empty Ordergroup and not in Property 14

Number of records	Order group	Property	Reason for resulted record
8	01.03		Not in Order group 01.02 and empty property
Filter on: Order group *Not In or Empty* 01.02, Electrical **OR** Property *Not In or Empty* 14, Columbus square			
1	14	01.03	Not in Order group 01.02
2	15	01.03	Not in both
4	15	01.02	Not in Property 14
5	14		Empty Order group field
6	15		Applied both (not in Property 14, empty order group)
7		01.02	Empty property field
8		01.03	Applied both (empty prperty, not in Order group 01.02)

Using filters

A filter contains one or more selection criteria on the basis of which the user can select the data quickly and easily. You can save the filters in Planon Web Client, and use them without having to specify the selection criteria again.

You can activate a filter by selecting it from the filters pick list. Different filters are available at every selection level. On the filter bar, you can view, add, delete, edit and copy a filter by clicking the **Filter option** button. You can switch between filters or select **No filter**, if you do not want to use any filters.



Using the date-time filter criteria

Using the date-time filter criteria

You can filter on date and time using the date-time filter criteria. The date-time filter allows you to set a filter on dates as well as the required time if necessary. When you select a date-time field in the **Select filter criteria** dialog box and click the calendar button, you will see that the current time is displayed (as the ‘=’ operator is selected by default.)

For the time values set for each operator available in the date-time filters across the application, refer to the table below.

Click the **Today** button to set the current day, date and time in the date-time field in the **Select filter criteria** dialog box.

Date-time operators

Operator	Time value
=	Current time
<=	23:59
>=	00:00
>	00:00
<	23:59
Between	00:00(FROM) – 23:59(TO)
<>	Current time

Toggle a filter on/off
Adding an AND/OR filter
Using the AND/OR filter
Grouping filters

Toggle a filter on/off

The Filter on/off button allows you to toggle the filter on/off. You can also save the filter that you created earlier for future use.

The Filter button allows you to switch on or switch off the current applied filter while keeping it selected in the filter bar.

When you create a new filter, it is switched on by default.

Adding an AND/OR filter

Planon allows you to create filters and group them with AND/OR relations so that you can do an advanced filtering of data.

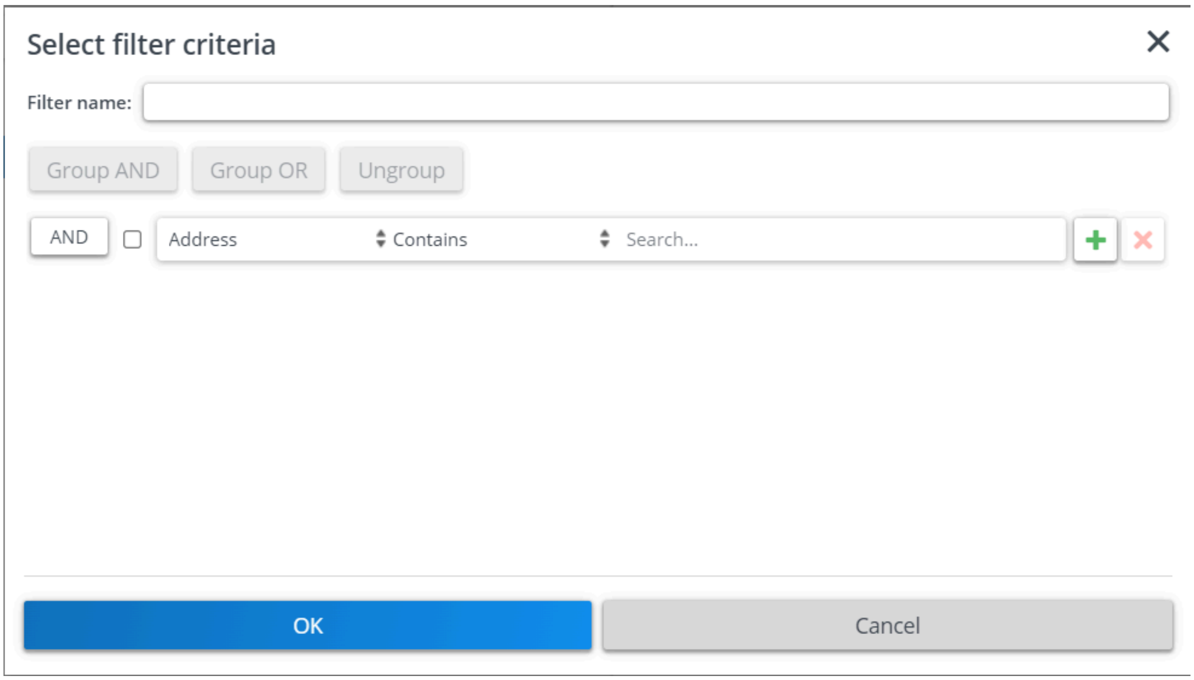
The filtering is available at every selection level and step in Planon.

Procedure

1. Select an element for which you want to specify a filter and click on the **Add filter** button on the filter bar.

For example, in **Personnel Management** > **Personnel,** click **Add filter** on the filter bar.

The **Select filter criteria** dialog box appears.



Two types of filtering methods are available:

- **AND** filter: This type of filter allows you to add multiple filtering criteria for your search. AND is selected by default.

On clicking the AND button, it switches to OR.

- **OR** filter: This type of filter allows you to set two different filter criteria for your search.

The filter criteria bar contains:

- A check box for grouping the filter criteria. Select the check box and click the **Group AND**/**Group OR** button.

- A list of fields available on the selected business object.

- The operator you want to use for filtering.

- Specific data available on the field that you selected for filtering.

- A plus button for adding additional filter criteria.

- A cross button for deleting the existing filter criteria.

Using the AND/OR filter

Procedure

1. When you want to use more than one filter criteria, use the AND button.

   To create an OR filter, click the **OR** button.
2. Enter a name for the filter in the **Filter name** field.
   If you do not give a name to the filter, it will be treated as a temporary

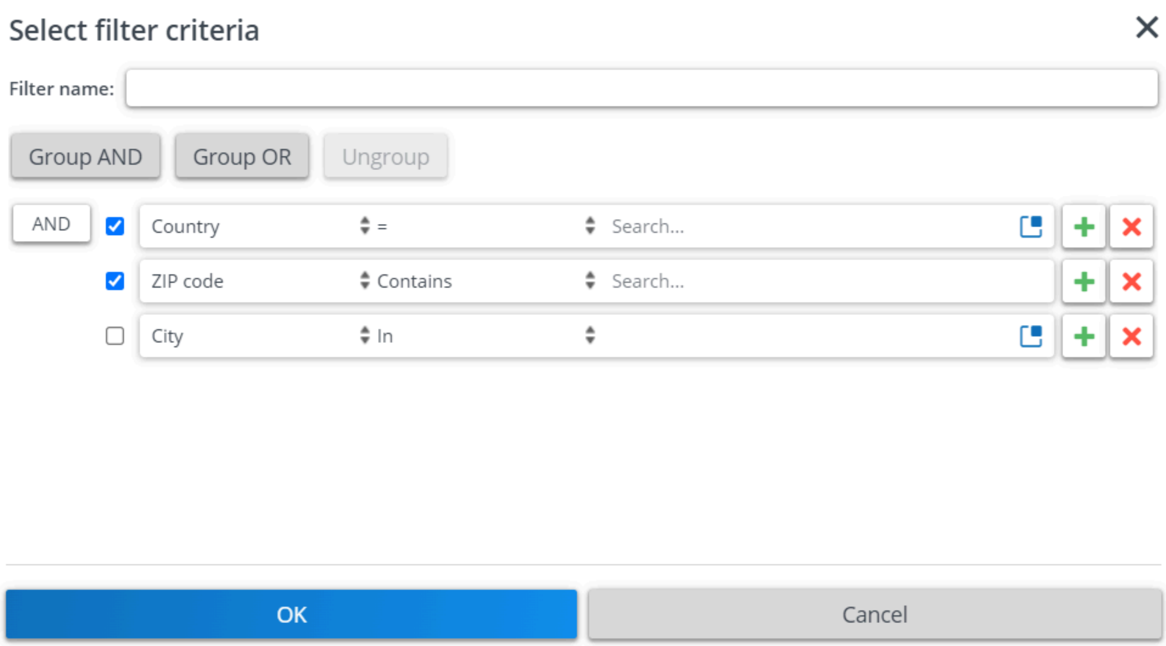
   filter and is deleted when you deactivate it.
3. Select the field for which you want to set a filter. For example, Person.
4. Select an operator, for example, '=.'
5. Fill in the person's name you want to filter on.
   If you want to add additional filter criteria, click the plus button and enter the filter options.
6. Click **OK**. An AND/OR filter is created.

Grouping filters

You can group the AND/OR filters. The filter criteria are grouped by selecting two or more criteria.

Procedure

1. Add multiple filter criteria by clicking the plus icon.



2. Select the check boxes of the filter criteria that you want to group.
3. Click **Group OR**. The selected criteria are grouped into a subset.
4. To ungroup, click the **Ungroup** button.

> You can group the filter criteria (only) up to three levels.

5. Click **OK**. The filter is now active.

> You can also add a filter on system fields such as System code, Update count, and so on.

Relative filters using macros

In some cases it may be convenient to define filters that enable you to filter out variable field data instead of fixed field data. This is called making relative filter selections. Relative filter selections are made by applying macros in filter definitions. Examples of variable field data are the current date-time and the current user.

Using macros in filter definitions on variable data saves you the trouble of having to adapt your filter definition every time you apply the filter.

A relative filter selection can consist these parts.

- A primary argument that defines the current date, current time, current user, current person or current property set.
- A secondary argument that defines the period of the relative filter (only applicable in date-time related filters).

Relative date-time filters
Primary and secondary arguments

Relative date-time filters

In the **Service Manager** TSI, you may want to know, on a regular basis, which orders have to be carried out on a particular day.
Or in the **Personnel Management** TSI you may want to retrieve the visitors for the current week or day.
For this purpose you can use a selection by date field.
It would be convenient if you were able to save a recurring selection such as this one, but if you enter the date the 'usual' way, you will need to change it each time you want to apply the selection.

You can define a relative filter from the current date-time in the date-time field. Here, relative means with respect to the current date and time. The system date is used for determining the current date and time.

A relative selection on date-time may consist of a primary argument that defines the current date and time and a secondary argument that defines the period of the relative filter.

Secondary arguments are entered after the primary argument. The two arguments are separated by a space. The secondary argument is followed by a number that indicates the number of times the specified period should be applied (e.g. &D5, &D#5). Both positive and negative numbers can be used. Note that a positive number is not indicated by a + sign.

Primary and secondary arguments are available in Planon ProCenter for date-time filter macros, check Primary and secondary arguments.

Primary and secondary arguments

Primary argument	Description
&DATETIME	Relative filter on the current (system) date-time. Can be used in date-time fields and in date fields. **Rounding of time**: You can round the start and end time using the following secondary macros: **&R15**, **&R30**, **&R60**. &R15 - rounds to the nearest 15, 30, 45, 00 hours. &R30 - rounds to the nearest 30 and 00 hours &R60 - rounds to the nearest 00 hours. **Example**: If the current time is 11:36 hrs, see how the time is rounded off using the macro(s): **&datetime &h1 &R15** - the time is rounded to 12:45. **&datetime &h1 &R30** - the time is rounded off to 13:00. **&datetime &h1 &R30** - the time is rounded off to 13:00.
&TIME	Relative filter on the current (system) time. Can be used on time fields. For example, Visitor's arrival/ departure time. You can round the start and end time using the following secondary macros: **&Time &R15** : rounds to the nearest 15, 30, 45, 00 hours. **&Time &R30** - rounds to the nearest 30 and 00 hours **&Time &R60** - rounds to the nearest 00 hours. **Example**: If the current time is 11:58 hrs, see how the time is rounded off using the macro(s): **&Time &R15** - rounds off to 12:00 hrs. **&Time &R30** - rounds off to 12:00 hrs. **&Time &R60** - rounds off to 12:00 hrs.
&STARTOFDAY	Relative filter on the current (system) date (assumes time = 00:00). Can be used in date-time fields and in date fields.
&ENDOFDAY	Relative filter on the current (system) date (assumes time = 23:59). Can be used in date-time fields and in time fields.
&REFERENCEDATE	Relative filter on the current reference date.
Secondary argument	**Description**
&Y (or: &YEAR)	Relative filter for defining a period in years.
&M (or: &Month)	Relative filter for defining a period in months.

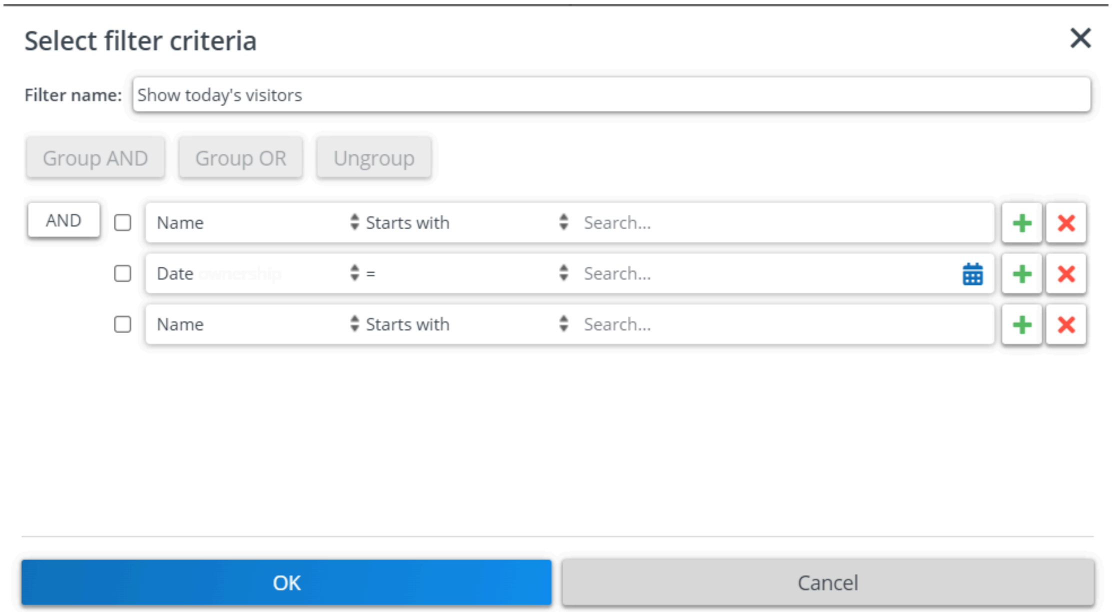
Secondary argument	Description
&W (or: &WEEK)	Relative filter for defining a period in weeks.
&D (or: &DAY)	Relative filter for defining a period in days.
&H (or: &Hour)	Relative filter for defining a period in hours.
&N (or: &Minute)	Relative filter for defining a period in minutes.
&Monday	Relative filter for defining a period in days following Monday in the week of the primary argument (= Monday before the primary argument.)
&FirstOfMonth	The first day of the month of the primary argument. This relative filter can be used, for example, to filter out the orders of the current month.
&FirstOfQuarter	The first day of the quarter of the primary argument. A filter on the first day/date of the current quarter of the current year preceded with **&datetime** primary argument.
&FirstOfYear	A filter on the first day/date of the current year. This filter returns 1-1-THISYEAR when preceded with **&datetime** primary argument.

Warning Secondary arguments must be preceded by a primary argument.

Examples of relative filters

- **Visiting date = &Startofday:** shows today's visitors
- **Visiting date between &Startofday and &Startofday &D1:** shows the visitors of today and tomorrow
- **&Startofday &Monday3** (or **&Startofday &Monday &D3**) means Thursday (00:00 h) of the week in which the current day falls.
  Note that a week starts on Monday, so if today is Sunday, this macro means last Thursday. If today is Monday, the macro means this Thursday.
- **&Startofday &FirstOfMonth-1** (or **&Startofday &FirstOfMonth &D-1**) means the last day of the previous month.
- **&Startofday &FirstOfMonth9** (or **&Startofday &FirstOfMonth &D9**) means the 10th day of the current month.

  Below is an example of a relative filter set on the **Visiting Date** field of a visitor.
- **&datetime &Firstofquarter** : shows October 1, 2018 when executed in Q4 2018.
- **&datetime &Firstofyear**: shows January 1, 2018 when executed in Q4 2018.



Warning Macros cannot be used in combination with fixed dates! So, a relative filter that includes an actual date will result in an error.

Special relative filters

Special relative filters

There is a number of special primary arguments that enable you to define relative filters for specific purposes. For a description of these filters, see the table below.

Primary argument	Description
&DATASECTION	Can be used to define a relative filter on the current property set.
&CODEGEN	In **Field definer**, authorized users can use the &CODEGEN macro to automatically generate codes (with max. length of 10 characters). Codes can be generated for business objects such as properties, persons and addresses. **Tip** For more information on using the &CODEGEN macro, refer to Field definer.
&USERNAME	Can be used to define a relative filter on the current user.
&USERID	Can be used to define a relative filter on the user ID code of the current user.
&PERSON	Can be used to define a relative filter on the person included in the Personnel Management TSI who is linked to the logged-on user. Authorized users can link a user ID to a person from the **Personnel** TSI in **Authorization** > **User groups**.
&Person.Property	Use this macro to display or filter on the property of the user linked to the account that is used. This macro only works for a property reference field.
&Person.Space	Use this macro to display or filter on the space of the user linked to the account that is used. This macro only works for a space reference field.
&Person.Address	Use this macro to display or filter on the address of the user linked to the account that is used. This macro only works for an address reference field.
&Person.Department	Use this macro to display or filter on the department of the user linked to the account that is used. This macro only works for a department reference field.
&Person.CostCenter	Use this macro to display or filter on the cost center of the user linked to the account that is used. This macro only works for a cost center reference field.

Editing a filter

Procedure

1. On the filter bar, select a filter you want to edit from the drop down list.
2. Click on the **Edit filter** button.
   The **Select filter criteria** window appears.
3. Edit the filter name or filter settings in this window.
4. Save the changes by clicking the **OK** button.

Copying a filter

Procedure

1. Select the filter you want to copy from the list in the filter bar.
2. Click **Copy** filter.

   The filter is copied and the name of the original filter appears with a number enclosed in parenthesis appended to it.

   > The copy filter button allows you to copy both your own user-defined (personal) filters and any predefined TSI user filters managed by your Planon administrator. Once you copy a predefined TSI user filter, the copy effectively becomes a personal filter.

Previewing changes in the existing filter

When you modify an existing filter by changing the filter criteria or adding more filter criteria, you can view the changes by clicking the Preview button in the **Select filter criteria** dialog box.

If the search results are satisfactory, save the changes on the filter and make it a new regular filter renaming it. You can also choose to save the changes on the same existing filter.

Warning You cannot copy a temporary filter.

Deleting a filter

Procedure

1. Select the filter you want to delete from the pick list in the filter bar.
2. Click on the **Delete filter** button.

   Planon ProCenter asks you to confirm before the filter is actually deleted.

Communication logs

Communication logs are records of communication regarding an item that is added to Planon . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.

For communication logs that were automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see Communication log fields .

You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Communication logs - reference date

Communication logs - reference date

Using a reference date with communication logs allows you to only view communication logs that are valid on that date. The reference date is set via **Reference date** button in the **Planon ribbon** and it is the current date by default. Clicking **Reference date** causes a date picker to appear from which you can select another date that is in the past or in the future.

You can deactivate the reference date by clicking **Deactivate reference date** in the Planon ribbon.

Reporting

The Reports tool is available on all the TSI selection levels and steps. It allows you to create reports for the selected data.

There are ready-made user report definitions available in the **Reports** dialog box > **User reports** tab. You can create three types of user reports: **Report**, **Data only**, **Mail merge**.

On some selection levels and steps, there are also system reports available on the **System reports** tab. System reports are the report definitions programmed by Planon. These definitions cannot be modified. You can, however, modify the report settings, if required.

Prior to creating a report, you must first select the TSI > selection level > selection step corresponding to the subject of the report. Data corresponding to these elements will be included in the report. For a description of the report field settings, refer to Report settings.

For example, if you want to generate a report on available workspace, go to Spaces & Workspaces > Workspaces and click **Report**.

- The report settings you configure are stored per report and per individual user. Next time you log in your personal settings are loaded again.
- When using the Planon application for creating reports, check your browser's pop-up blocker settings. The Planon site needs to be a part of the allowed sites of your browser's pop-up blocker otherwise reporting functionality, such as previewing a report, will not work properly.

Saving reports

This topic describes how you can save reports in Planon . Reports can be saved in several formats, such as CSV, PDF, HTML and XLS.

Procedure

1. Select the report you want to generate.
2. On the action menu, click **Save as**.

   The Save as dialog box appears.

   Refer to Save options for reports and select the appropriate options in the dialog box.
3. Click **OK**.

Save options for reports

Complete the following fields when saving a report:

Field	Description
Output	Specify the path where the report must be saved.
Save as	From the list, select the format in which you want to save the report. The available formats depend on the type of report you select. The following file formats are available for user reports: • CSV • HTML • PDF • XLS: Data only • XLSX: Data only The following file formats are available for system reports: • CSV • HTML • PDF • XLS: Data only • XLS: Formatted Single Sheet • XLS: Formatted Multiple Sheet • XLSX: Data only • XLSX: Formatted Single Sheet • XLSX: Formatted Multiple Sheet
Delimiter	Select a special character to separate the fields in the saved report. You can choose between semicolon (**;**) and comma (**,**). Available only for CSV output.
Output line break characters as	Allows you to give line break characters such as, Space, LF (Line Feed), CR (Carriage Return), CR\LF, . CR and LF are used to mark a line break in a text file. Windows uses CR/LF, Unix uses only LF and the MacOS (pre-OSX MacIntosh) uses only CR. Available only for CSV output.
Include header	Select **Yes** to include a header. Available only for XLS, XLSX and CSV output.
Wrap text for Excel	Select **Yes** if you want to wrap the text in the cell output. This feature is only available for XLS- and XLSX **data only** formats.

Exporting data to XLS / XLSX

When exporting data from Planon to Excel, the data is exported mapping the Planon format to Excel. This enables users to perform calculations in Excel without having to first reapply formatting.

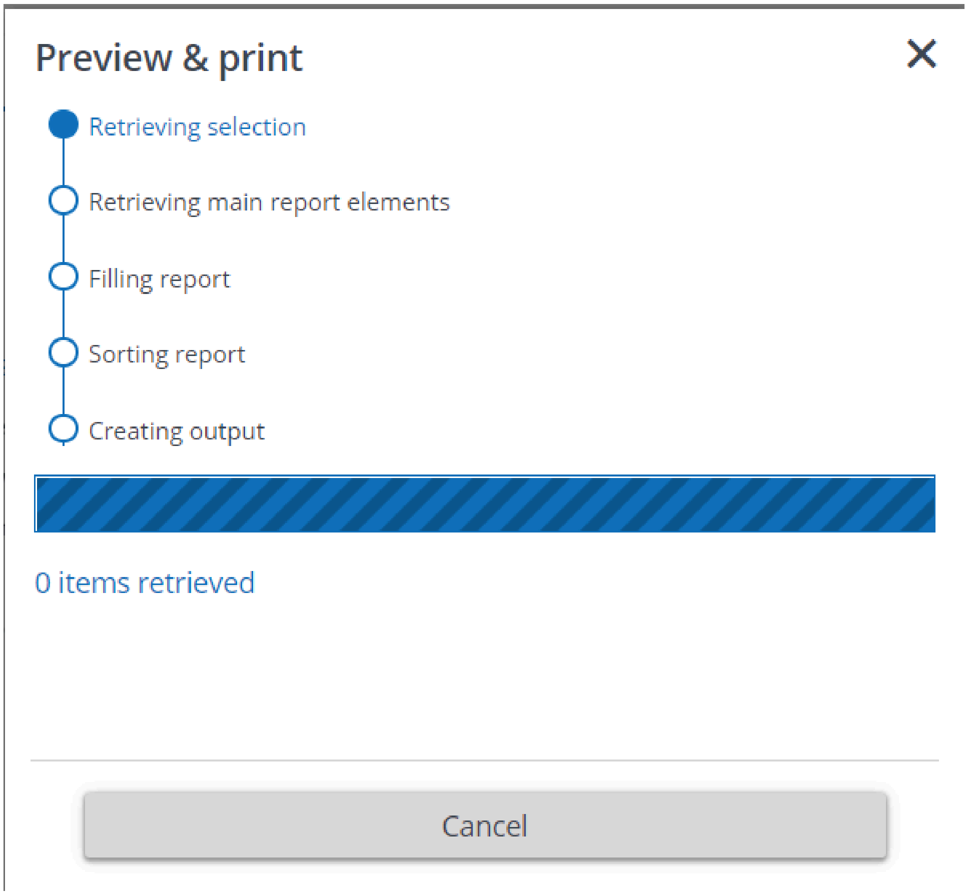
The mapping between Planon and Excel is as follows:

Planon field type	Excel cell format	Remark
Numbers	General	Not taking into account the Planon mask
Dates/date-time/time	Custom	Taking into account the Planon mask

- There is a difference in the way times are treated in Planon and Excel. Times are stored in numbers in Planon and the '0' is defined differently. This may cause unexpected results when comparing times in Planon and in Excel.
- Expressions, if the result is a number, date, date-time or time, will be formatted as specified above.
- Totals and group totals will be formatted as specified above.
- Group headers will not be formatted.
- Expressions, if the result is a number, date, date-time or time, without a Planon mask will be exported with the Planon java mask. This could differ from the Excel mask.
- Separators (date, decimal, thousand) are derived from the Excel user locale.

Previewing & printing reports

For user reports, when selecting the **Preview & Print** option, a dialog box indicating a step by step progress of report generation is displayed. The generation process also displays the number of elements being retrieved and filled. You can cancel the preview of a report while it is in progress by clicking **Cancel** or by just closing the dialog box.



Warning When a report contains more than 500 records, generating it may take a long time. When this happens, a warning message will be displayed notifying the user about this possible performance issue.

Report settings

The following table lists the fields available for report settings.

Field	Description
Print only selected element(s)	Using this option, you can narrow down the number of elements to be printed. Only elements that have been specifically selected from the list will be printed in the report.
Print user name	This option enables you to have your login name printed in the footer of the report.
Name	This option enables you to enter a name for the report.
Print drill down route	If you enable this option, the drill-down route displayed at the top of the elements list on your screen will also be printed in the header of your report.
Print titles and drill-down route on each page	By enabling this option, you have the report title and drill-down route printed on each page of the report.
Subtitle	If you would like to add a subtitle to your report, you can specify one in this field. The subtitle will be placed immediately below the report's main title.
Preview all documents as one file	The preview will be shown in one file for Word mail merge reports.

Archiving element(s)

In Planon Web Client, it is possible to transfer some elements, such as orders or visitors, using the **Transfer to archive** button. If you archive elements, the elements are no longer shown on the elements panel.

Once archived, the data of these elements cannot be modified.

If you need to modify an archived element, you must first retrieve it from the archive. It is, however, also possible to modify archived elements directly. For the required settings, contact your application manager.

If you want to archive multiple elements at the same time, use the Action on selection option.

To display the archived elements in the elements panel, click the toggle button or the **Show archived items** button.

History

Planon enables you to keep track of changes made to fields by enabling the **History** functionality. This includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. Your application manager can enable an automatic **History** option for individual fields in Field definer. For more information, see Configuring the history feature.

Any modification to the field's value will be saved automatically in a log file. The results of any field changes can be viewed on the **History** selection step of the relevant TSI.

With the appropriate authorization, you can also manually add a history of changes to the selected field, via the action panel. Any comments you want to make on changed data can be specified in the **Comment** field and subsequently saved. To enable history manually, see Adding history manually.

Following GDPR legislation, any personal data stored even in history records must be anonymized. To anonymize history in Planon , see Anonymizing history.

Viewing history logs

If automatic history has been enabled, any modification to a field's value will be saved automatically in a log file. The results of any field changes can be viewed on the **History** selection step. The following case shows how history is used in the Personnel TSI.

Case

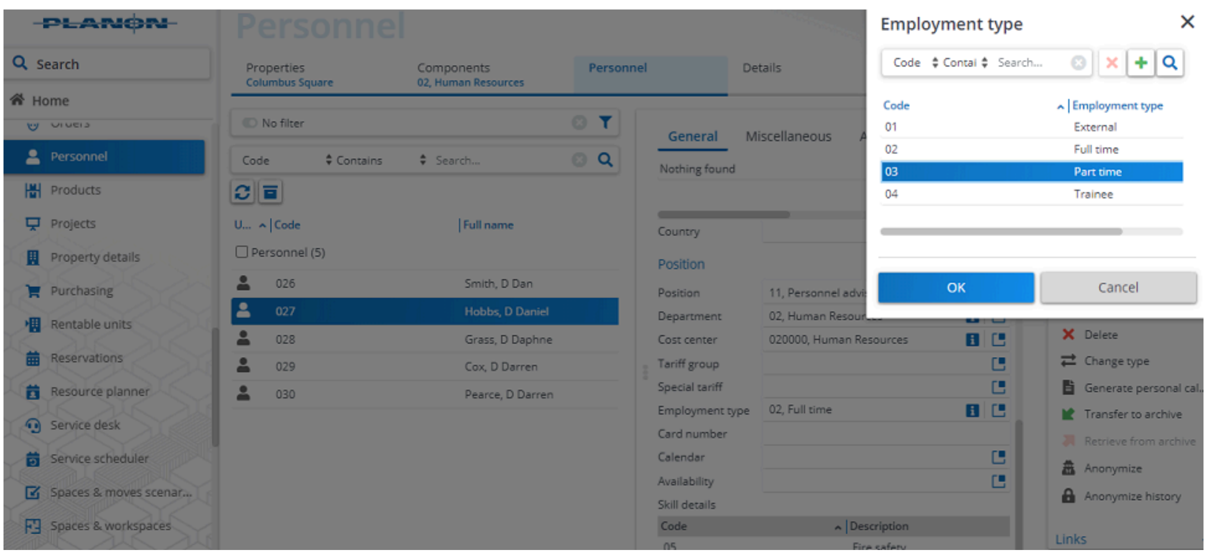
Employee Daniel Hobbs has a full-time contract but is now going to work part-time. You must adjust this in the Personnel TSI.

Procedure

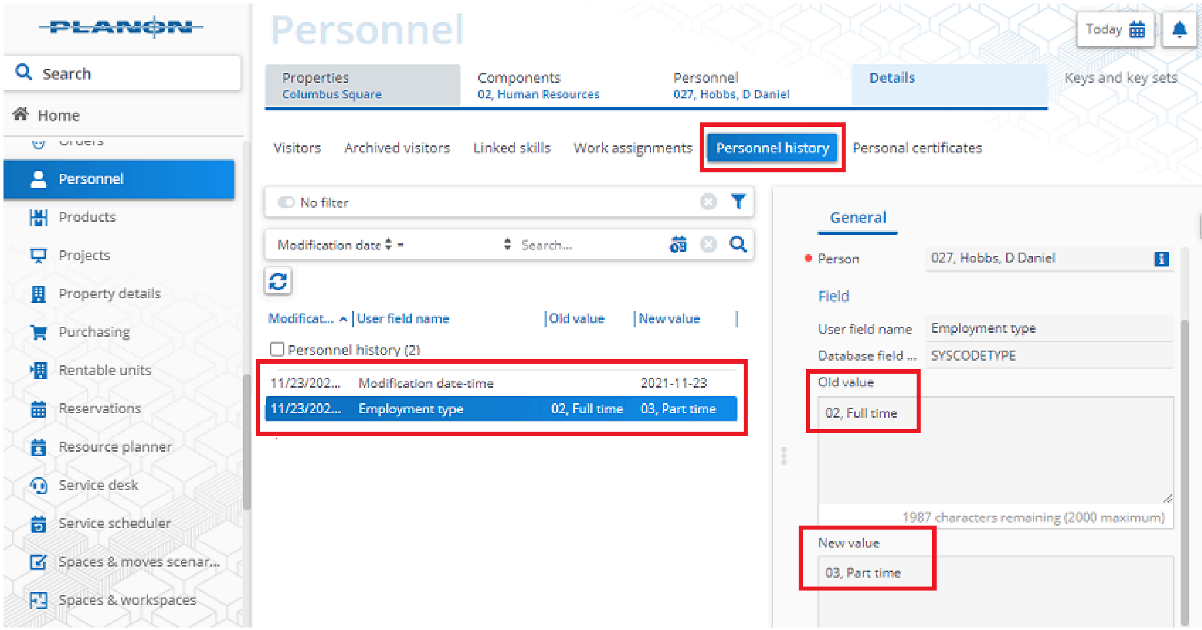
1. Select Daniel Hobbs.
2. Select the **Employment type** field. For this field, automatic history has been enabled.

> To enable automatic history for individual fields, see Field definer .

3. Change the value in the **Employment type** field from **Full time** to **Part time**.



4. Click **Save**.
5. Go to the **History** selection step to see the history of changes.


PLANON
Search
Home
Personnel
Products
Projects
Property details
Purchasing
Rentable units
Reservations
Resource planner
Service desk
Service scheduler
Spaces & moves scenar...
Spaces & workspaces
Personnel
Today
Properties
Columbus Square
Components
02, Human Resources
Personnel
027, Hobbs, D Daniel
Details
Keys and key sets
Visitors
Archived visitors
Linked skills
Work assignments
Personnel history
Personal certificates
No filter
Modification date
Search...
Modificat...
User field name
Old value
New value
Personnel history (2)
11/23/202... Modification date-time 2021-11-23
11/23/202... Employment type 02, Full time 03, Part time
General
Person 027, Hobbs, D Daniel
Field
User field name Employment type
Database field ... SYSCODETYPE
Old value
02, Full time
1987 characters remaining (2000 maximum)
New value
03, Part time

Adding history manually

With the appropriate authorization, it is also possible to manually add history by entering a comment.

Procedure

1. Select the field to which you want to manually add a comment.
2. Select the **History** selection step on the selection level.
3. In the action panel, click **Add**.
4. Enter a comment in the **Comment** field.
5. Click **Save**.

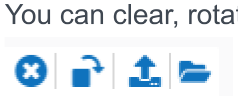
You have manually added history.

Field types

Planon ProCenter supports different field types. For an overview of field types refer to the table below:

Field type	Description
Text field	Enter free text. The length of the text field is limited.
Comment field	A comment field is used to enter comments of any length.
Reference / pick list field	Select an option from a predefined pick list. Instead of selecting a value from a pick list directly, you can select a value from a pick list through auto suggestions. The auto-complete feature allows you to enter partial text and displays matching results. You can then select the correct value from the suggested list. A maximum of (first) 10 items are displayed. Select one of the options from the results displayed. If you want to hide the list, press the ESC key on your keyboard, the cursor moves back to the end of the entered text. Each element in a pick list is linked to a code and description. In pick lists containing codes, however, you must enter a code. Do not use a description in these fields. It is possible to use search options in pick lists. You can search by the code and/or the element’s description. When performing a search request, it is necessary to select one of the available operators. For more information on the available operators refer to Search operators. In some pick lists, it is possible to use predefined filters. Use the radio buttons to select the appropriate filter option. In a multiple pick list, multiple options can be selected at the same time. An example of a multiple pick list is the **Person type** list. A person can have several roles (= **person types**) in Planon ProCenter, so it is possible to select more than one person type.
Numerical field	Enter numerical data.
Date field	Enter a date from a date picker. The following date formats are supported: For English users: mmddyyyy / mmddyy / mmdd For non-English users: ddmmyyyy / ddmmyy / ddmm If you do not enter the year, the current year is added to the date. You can also enter the date in numeric format in the **Date-time** field. The date is converted to the appropriate format automatically based on the regional settings of the user.

Field type	Description
	You can also press CTRL+D to insert the current date.
Time field	Allows you to enter the time using the built-in date picker. Time can be specified in hours, minutes and seconds.
Date-time field	Allows you to use the built-in picker to select a date and time. You can also enter the date and time in numeric format. For example, 10182012 14:40. For more details on entering a date in numeric format, see Date field. If you enter only the date, and not the time, and then tab out of the field, the time is displayed as 00:00. However, if you specify a default time, the time is calculated automatically and added.
	You can also press CTRL+D to insert the current date and time.
Multiple time zone field - property	If the multiple time zone functionality has been activated, data in date-time fields that is directly related to a property, will be derived from the property's time zone.
Multiple time zone field - user	If the multiple time zone functionality has been activated, data in date-time fields that is directly related to a user account, will be derived from the user's time zone.
Period field	A period can be specified in minutes, hours, days, weeks, months or years. A period field is often used in conjunction with date fields.
Link field	By means of a link field, a file that has not been created in Planon ProCenter may be linked, for example an AutoCADdrawing or a Microsoft Excel document. You can view this file by clicking the button. In Web Client, when WebDAV is used, the WebDAV location will not be displayed, only the folder excluding the folder specified in file location and file name will be displayed.
File upload field	Using a file upload field, a file can first be retrieved from a source location and then sent to a target location (specified in System Settings > File locations). Only the file path relative to the WebDAV location is displayed and not the full WebDAV location. See also Uploading a file.

Field type	Description
Life cycle aware fields	The fields which can have multiple life cycles are called life cycle aware fields. For example, Contract, Contract line and Rentable unit. The value displayed in the field depends on the reference date. When the reference date is turned off, the icons are highlighted in red color and a tooltip is displayed to warn the user.
Document (secure)	In the **Document (secure)** field authorized users can view a document that is stored at a secure file location, without accessing the actual secure file location itself. Users with **Read/Write** rights for this field can even upload documents to this secure location. The maximum file size is 20 MB. With **Read** rights users can view the document by clicking the  button. With **Read/Write** rights users can view the document and edit it in a temporary directory on their local machine. The edited document can then be uploaded back to the secure location via the folder button. Only the file path relative to the WebDAV location is displayed and not the full WebDAV location. **Application behavior**: • When you upload a document with the same name (again), it will overwrite the existing document and will prompt a warning message asking to confirm the action. • When you upload a new document (with a different name), it will overwrite the existing document on disk. • When you delete a document, it will not only be deleted from the record, but also from disk. • When you copy a record containing a secure document, also the document on disk will be copied.
Money field	Allows you to enter monetary amounts. Planon Web Client automatically adds the currency symbol and the required commas or decimal points. **Warning** Money fields accept and display values as per the defined number of decimal places.
Internet address field	Allows you to enter an Internet address in this field.
Image	This is a link field that allows you to link a file that has not been created, for example a drawing or photograph of a property. You can clear, rotate, upload or select an image file using the  buttons respectively. Planon supports the image types .jpg, .jpeg, .png, .gif, .tiff, .svg, .bmp, and .ico.

Field type	Description

To reduce overhead and improve scalability for viewing and downloading images, images are scaled while uploading. The original uploaded image is stored in WebDAV file location of Planon.

For the extensions .jpg, .jpeg, .png and .gif, the uploaded image is displayed as a thumbnail and if you click on the image, it is displayed in its full size. When you click another image file type, the file is downloaded for security reasons.

To download an image, place the cursor on the image > right-click >**Save image as** > specify **Path** and **File name** > click **Save**.

The displayed or downloaded image is a scaled image, not the original image you uploaded.

 Indicates that no image is selected.

 Indicates that the uploaded image is a document.

 Indicates that the selected image no longer exists.

Self-Service – an Introduction

Planon Self-Service (PSS) allows users to complete simple tasks more easily. These tasks can be started from the gadgets on their homepage. PSS can also be integrated into your intranet as a stand-alone product.

PSS is a collection of several web definitions that are linked to a site. A web definition is a web form through which functionality is made available for users. **Service Requests, Knowledge Base, Visitors, Reservations** are some of the PSS web definitions that are available as web forms.

The forms displayed on your site depend on how your company chooses to configure them for you. You can use the PSS features either through the Planon application interface or publish (integrate) all Self-Service web definitions via a self-designed intranet page of your organization.

For more information about the Planon application interface, refer to Planon application - an Overview.

What you see on your Self-Service screen is configured for you.

For example, if you are working for an educational organization, there may be different sites configured for the staff and students. A link on the intranet page takes you to the Self-Service screen that you want to use.

Contact your application manager for more information about customizing your PSS configuration.

Self-Service - Standard features

Planon Self-Service (PSS) web forms have a common structure. The print screens and information displayed in this document are an example of what a form could look like. Contact your application manager for customizing the forms.

Self-Service form

A Self-Service form is a web page that combines various blocks. A block is a section in a page.

The following table describes the generic pages and blocks available in PSS:

Page	Description
Add page	Allows you to add an element which then becomes available in the list page. For example, if you add a visitor using the **Visitor add page**, the visitor is listed in the **Visitor list page** and becomes available for the back office. An add page has an add block where you fill in the information to create a new element. The fields with an asterisk are mandatory. For example, you fill in the visitor data on the add block of the Visitor page. **Tip** For a description of the field types and the corresponding icons used, refer to Basic navigation in *Planon Web Client*.
Edit page	Allows you to edit the element details. For example, edit a visitor’s details. An edit page has an edit block where you can make modifications/edits and submit the changes. There are, however, some differences in the way the edit page works across the modules: **Tip** For more information, refer to *Self-Service Modules*.
List page	The List page consists of: - An **information block/help text** on the top of the page. The information block displays additional information or instructions specified for the page. - A **search block** that allows you to search for a specific element. Specify the search criteria in the search fields. - A **list block** that displays the available elements on the page. The list block displays search results in the form of rows. Clicking a row will display the details of the selected element in a detail block. If the number of results exceeds the number specified in the settings, navigation buttons are enabled.

Page	Description
	The Navigation buttons  display a count of the number of pages on the web form. The display of the page numbers is configurable by your application manager.
Confirmation page	Consists of a **confirmation block**. It displays the default text to confirm the action that you performed. For example, a confirmation is displayed when a new visitor is added.
Details page	Consists of a **details block**. It displays complete details of an element.

In PSS, there are some blocks that are available only with specific pages. The following table describes these specific blocks:

Page	Description
Order lines block	This block is available only in the Work orders page.
Upload block	The upload block is available in the Add/edit pages of **Service requests**, **Orders**, **Move request**, **Workflow** and **Reservations**
Communication logs block	This block is available in **Service calls** > Details page.
Question block	This block is available in **Service calls** and **Workflow**.

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.

  Warning 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.

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

Shortcut keys

Planon supports keyboard shortcut keys to perform certain actions in the application.

- Shortcut keys are not supported on tablets or mobile phones.
- Pressing the **?** on your keyboard (SHIFT+?) will display a dialog box containing (some of) the most important shortcuts. You can also display this dialog box by clicking  > **Keyboard shortcuts**.

The following lists display the most important keyboard shortcut keys that can be used in the Planon application.

General

Press key(s)...	To...
CTRL+F4	Quit the current browser tab
ALT+F4	Quit the browser
TAB	Navigate to the next screen element
SHIFT+TAB	Navigate to the previous screen element
CTLR+F5	Refresh your browser
ALT+F1	Open the configured Planon WebHelp. **Note**: An error is displayed if no webhelp is configured.
? (SHIFT+/)	Display a list of keyboard shortcuts in Planon
ALT+L	Open/close navigation panel
ALT+S	Activate searching in the navigation panel; puts cursor inside the search box.
CRTL+S	Save the record

Zoom in/out

Press key(s)...	To...
CTRL+	Zoom in (maximum font size 24 pt)

Press key(s)...	To...
CTRL-	Zoom out (minimum font size 6 pt)
CTRL 0	Reset font size
CTRL+scroll	Zoom in or out

Warning In Windows 10, the default zoom for the Google Chrome browser is set to 125%. Hence, elements in Planon may look larger in Chrome when compared to other browsers.

Data panel

Press key(s)...	To...
CTRL+D	Enter the current date-time in date-time fields (and also the user name in memo fields)
	Enter the current date (date fields only)
	Enter the current time (time fields only)
CTRL+C	Copy selected text
CTRL+V	Paste selected text
CTRL+X	Cut selected text
DELETE	Delete selected text
CTRL+Z	Undo (only changes in the active field)
HOME	Go to the beginning of the line
END	Go to the end of the line
CTRL+A	Select the field value (text) if cursor is placed in it.
	Select entire text in the page when cursor is not placed in a field
CTRL+HOME	Move the cursor to the beginning of the field (memo fields only)
CTRL+END	Move cursor to the end of the field (memo fields only)
Holding SHIFT +cursor movement (ARROW, HOME or END keys)	Select or extend the selection of text

Press key(s)...	To...
Holding SHIFT +CTRL+cursor movement	Select or extend the selection of text by word or text block
CTRL+LEFT/ RIGHT ARROW	Move cursor to the beginning of the previous or next word
LEFT/RIGHT ARROW	Move cursor within a field (only when field has focus)
UP/DOWN ARROW	Move up and down through editable fields
TAB	Move forward through fields and field buttons. Focus on info or pop-up buttons. Set a tab in a memo field
SHIFT+TAB	Move backward between fields and field buttons
CTRL+TAB	Go to the next browser tab
ENTER	Enter a new line in a memo field. Select the focused element.
HOME	Jump to the beginning of a row
END	Jump to the end of a row
Arrow keys	Navigate through the element list / tree
Any alphabet key	Jump to the first element in the list / tree starting with that key (alphanumerical). Pressing the key multiple times loops through all the elements starting with that key. On a non-paginated list / tree, it goes through all the opened nodes. On a paginated list / tree it only goes through the opened nodes of the current page.
SHIFT+HOME	Select the root node of a list or tree (grid and proxy panel)
F5	Refresh the elements list

Actions

Press key(s)...	To...
ESC	Cancel changes
CTRL+S	Save changes
CTRL+space	Find an element by its number or code. **Warning** The shortcut will only work if there is a **Find** icon () at the top right corner of the header. The shortcut is included in the following TSIs: • Work Orders • Assets • Personnel • Contracts • Invoices • Moves • Projects
RIGHT ARROW	Open the action drop-down list if there is more than one action
UP/DOWN ARROW	Navigate through action items

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