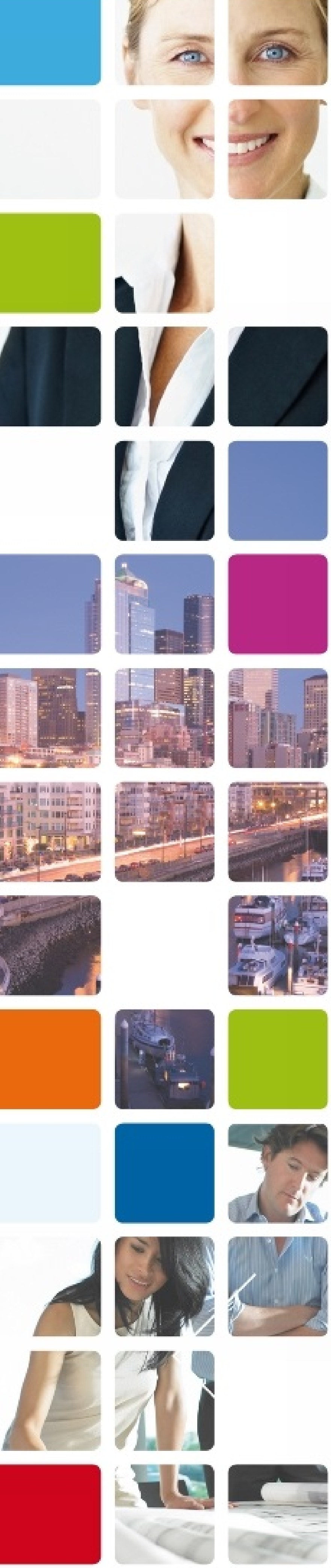


Essentials Edition

Version: 1.0

Fundamentals

Table of Contents

Starting Web Client

Logging in

To log in to Planon Web Client

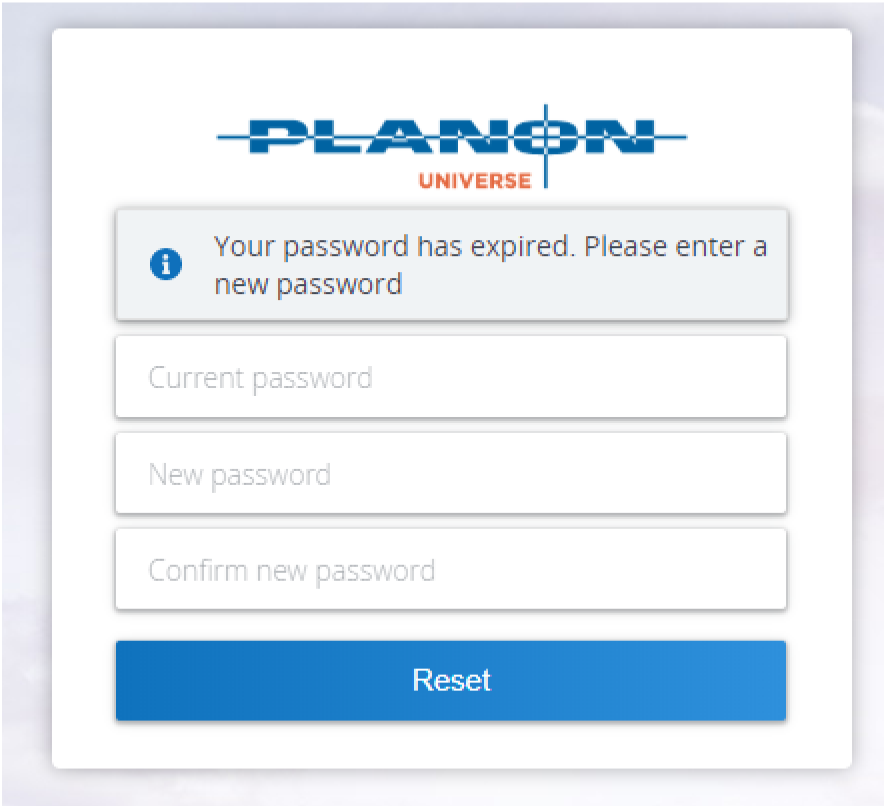
Procedure

1. Click the URL of the Planon Web Client.
2. On the login screen, enter your user name and password.

3. Click **Login**.

> The login page will be displayed in the language of the browser. If this language is not supported, the login page will default be displayed in English.

If your password is reset, depending on the password settings, you will be prompted to change your password at the time of log in. The following change password screen is displayed.



- In the **Current password** field, enter your password.
- In the **New password** field, enter your new password.
- In the **Confirm new password** field, retype your new password for confirmation.
- Click **OK**. You can now log in with your changed password.

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, you will be logged out automatically.

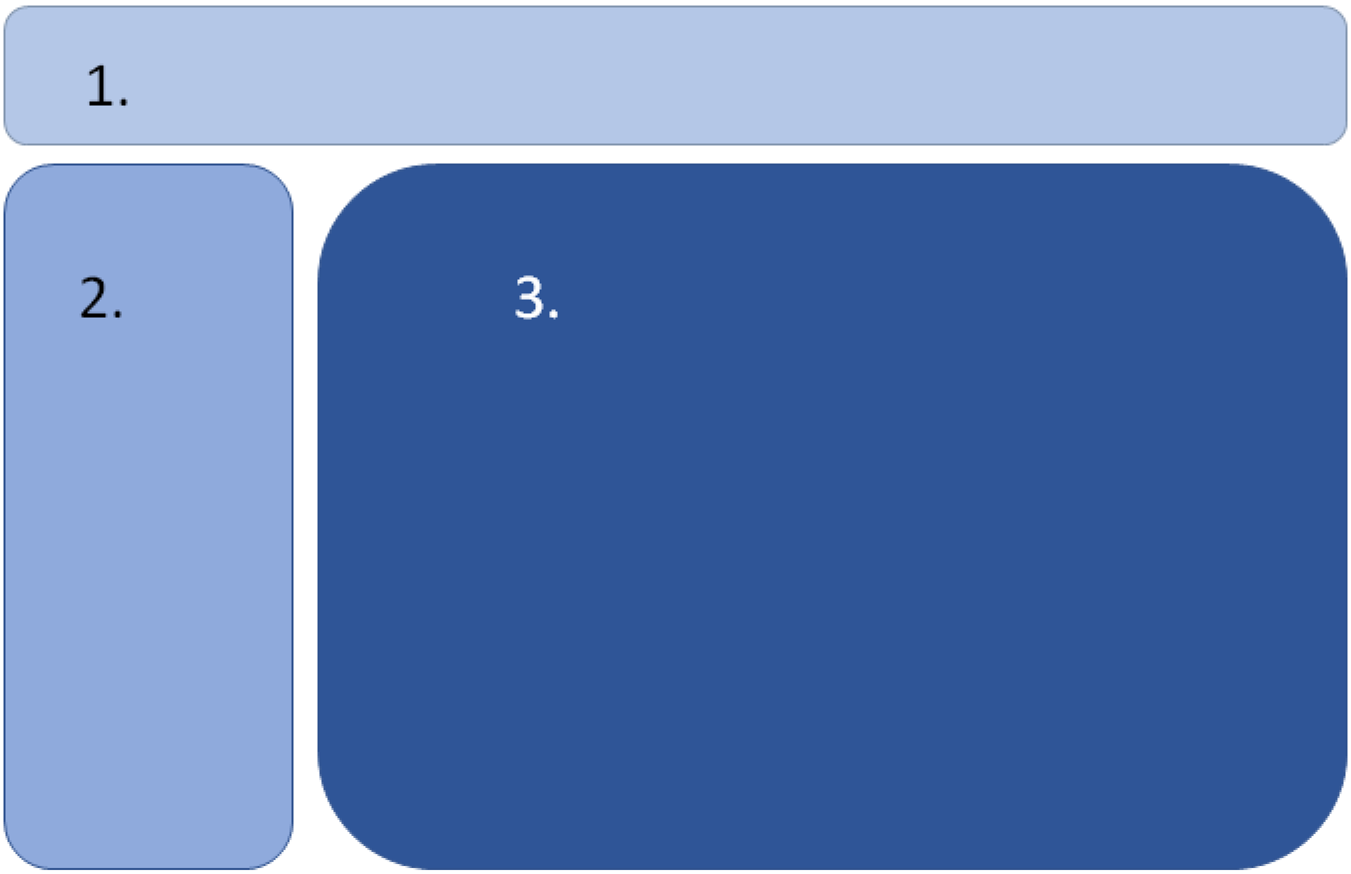
Overview

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

The Planon user interface mainly consists of three sections:

1. **Planon ribbon**
2. **Navigation panel**
3. **Workspace**

Following is the image that explains the Planon structure.



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, refer to 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, refer to 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, refer to Homepage.

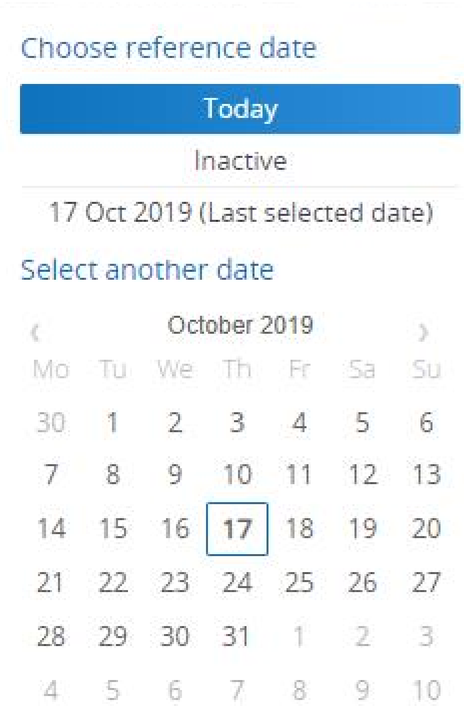
Multi tab browser support

- 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

The Planon ribbon contains the following 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 make the reference date inactive by selecting the **Inactive** option. The **Or select another date** option enables you to select another 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 Help menu.
- Click on 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

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 TSIs > **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 **System Settings** > **General** > **Help URL**.
- **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, refer to *Authorization* > *Privacy statement*.
- **About**: Enables you to get information about the version of Planon you are using.

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

My account

Planon features a **My account** button to allow users to edit their personal information. The button is available in the **Account** menu.

Using **My account**, a user can change his/her password, edit personal data and other settings by clicking the **Edit** button.

Planon provides the following basic options in the **My account** pop-up. The Planon application manager can add or remove fields to this pop-up by using Web Configuration .

- **Account details**

  The user can view his/her **User name**, **Password expiry date** and change password using the **Change password** option.
- **Personal data**

  The user can edit his/her personal data such as **First name**, **Surname**, **Email**, **Telephone**, **Property**, **Department** and **Photo**. Users can change their photo by dragging and dropping an image or by browsing for the right file.
- **My account settings**

  The user can change specify settings such as **Theme**, **Use 24 hour notation?**, **Planon Language**, **Displayed unit of length** and **Autoselect first item in list**.

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

The name displayed in the **My Account** drop-down is derived from the person or account. The following table indicates which name 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** drop down is determined based on the following table:

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

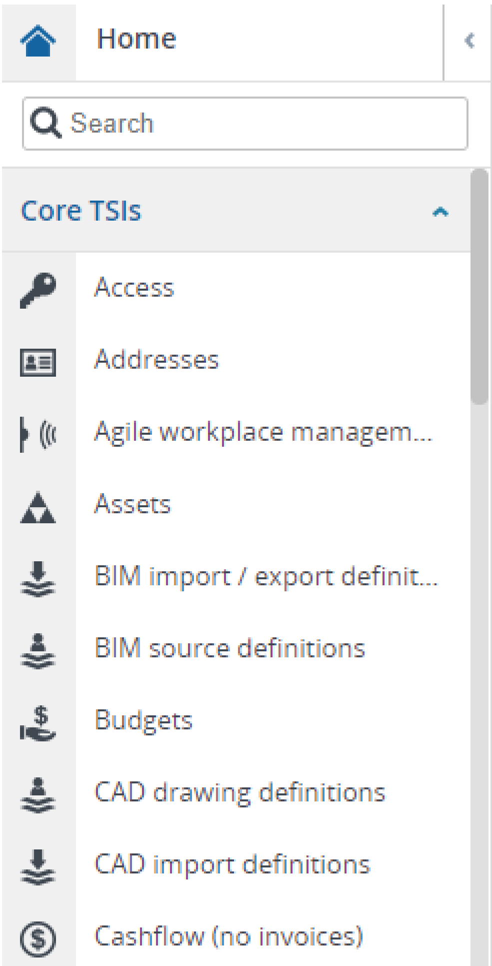
When the **Person-Photo** of the linked person does not have a value, then a default image will be displayed. This image placeholder will have a colored background with one or two characters. The following example shows which characters will be displayed in the placeholder:

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

When **Person - First Name** and **Person - Last Name** both do not contain any value, it means either the fields are empty (none of them are system mandatory) or there is no person linked to the account.

Navigation panel

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



Instead of browsing for navigation items, you can search for them using the quick search bar Search. The search will remember your last five searched items and will display them when clicking in the search bar.

There are two modes for the navigation panel:

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 on the button.

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

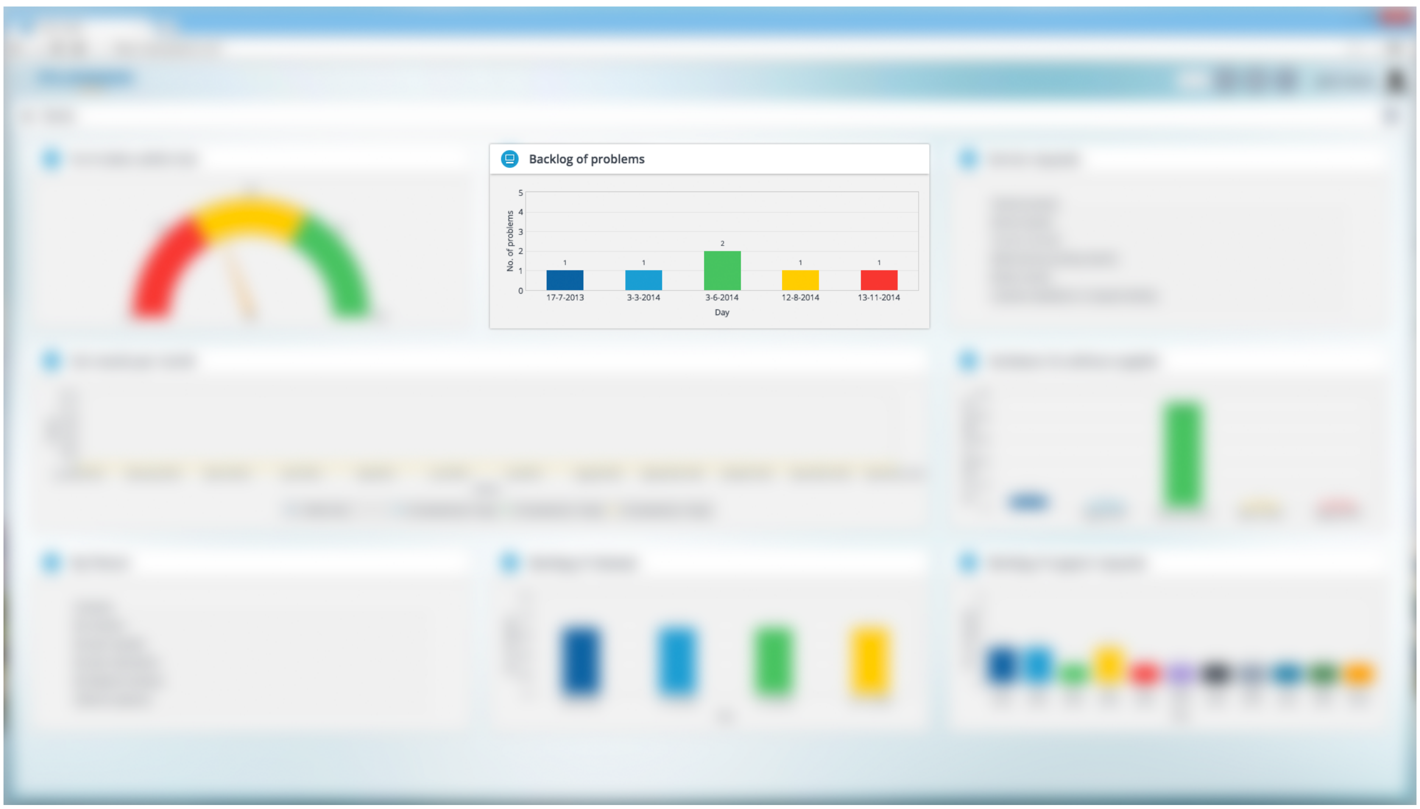
Collapsed: In this mode, the navigation panel is hidden. You can expand the navigation panel by hovering the cursor on the button. A floating navigation panel becomes available and allows you to do your actions on the navigation items, such as, opening a TSI in the workspace. To hide the navigation panel again, move the cursor out of the panel area. You can pin the panel to keep it expanded by clicking on the button. When you minimize your computer screen, the navigation panel is automatically collapsed. It jumps back to the previous mode when you expand it again.

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

Homepage

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

The following image displays the Homepage with several gadgets. You can see a gadget highlighted.



Gadgets

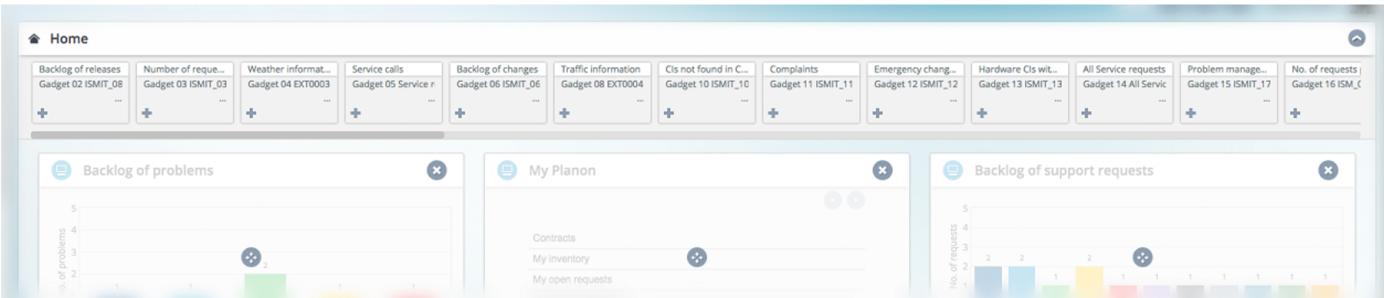
A gadget gives you quick and easy access to vital information directly from your homepage. You can configure the gadgets on your homepage by using the gadget library. The library contains several predefined gadgets and allow you to customize your homepage with gadgets of your choice.

Configuring gadgets on the home page

To configure gadgets on the homepage

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 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.

   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.

> The gadget library will be empty, if all the gadgets are added to the homepage.

Tablet users

Planon Web Client offers an interface that runs on all desktops, laptops and tablets. This enables an optimal use of space available on the screens with different resolution (responsive behavior) and touch support on tablets. The Planon Web Client is built for three major mobile platforms, Android, iOS and Windows.

Users such as field engineers, managers and Self-Service users can use Web Client on tablets to access and update information on the go.

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

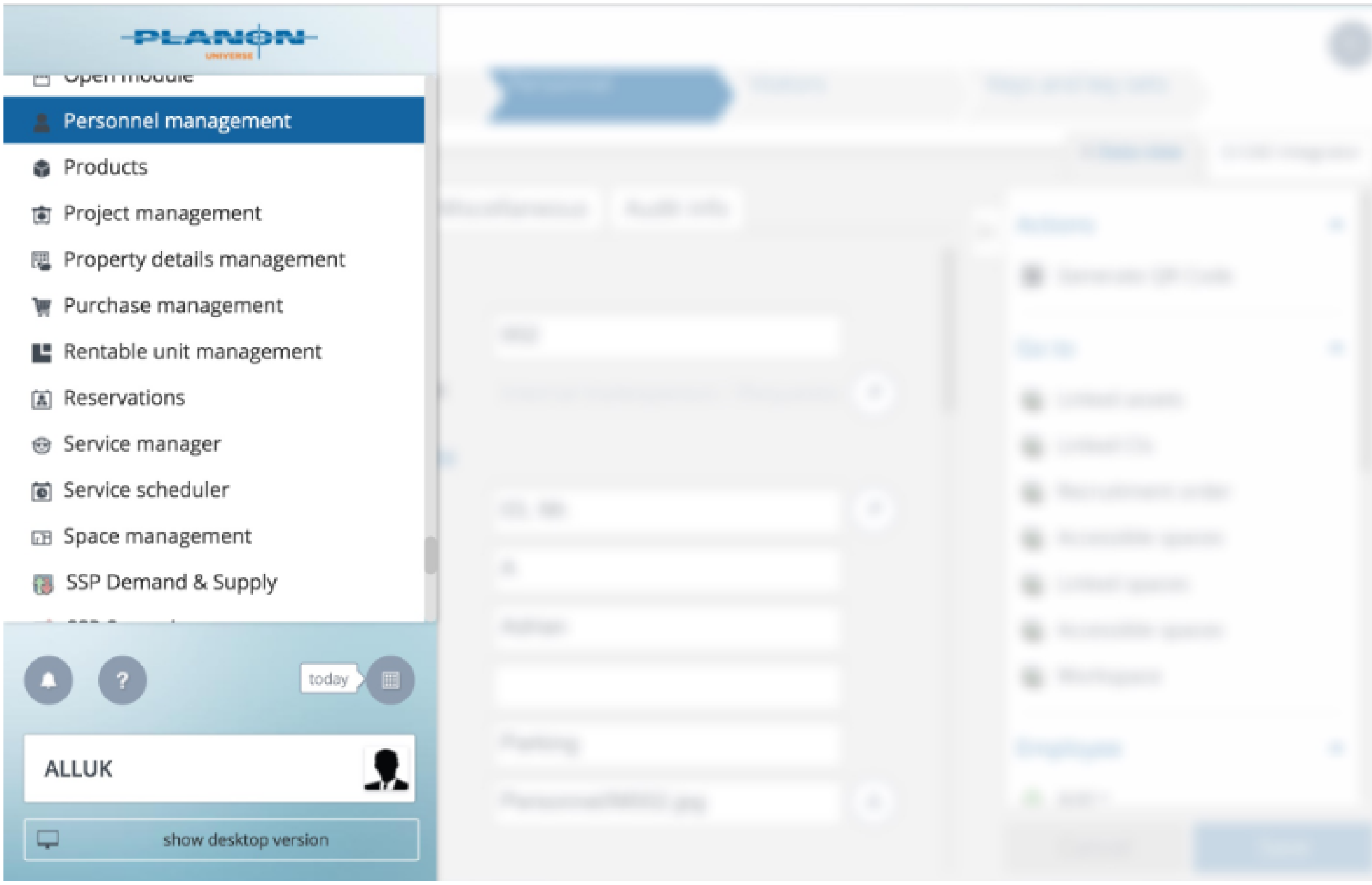
Getting started

Log in to Planon Web Client on a tablet.

After the login, the homepage of the Web Client is shown full screen.

Web Client menu

The Web Client menu represented by the button, integrates the navigation panel and the ribbon into a single menu. Tap this button to open 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

At the bottom of the Web Client menu, the general functions such as user account details, the alarms button and other details are displayed.

For more information about the general functions, refer to Ribbon > User account details.

The **Show desktop version** button enables you to open the desktop version of the Web Client.

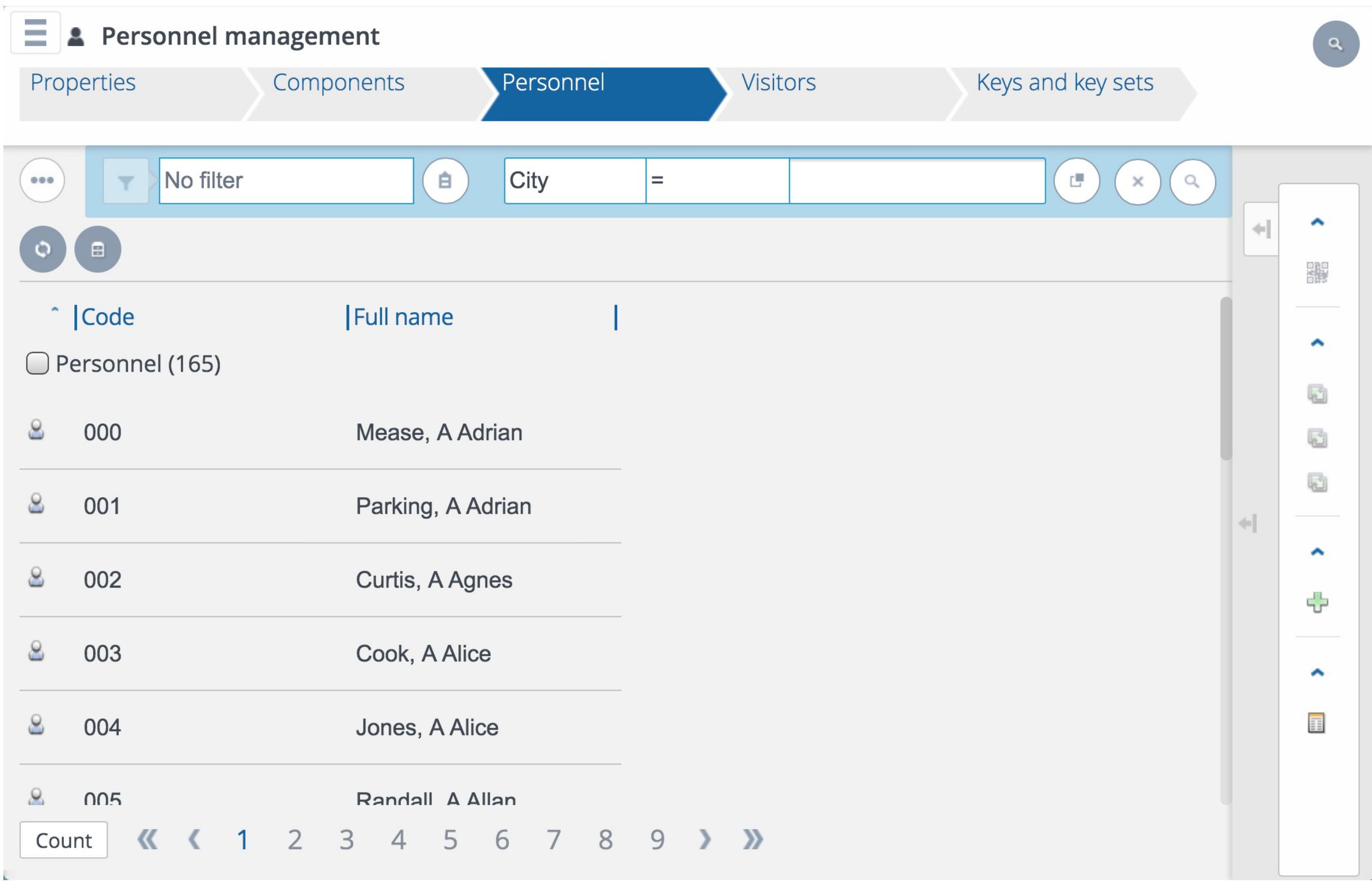
Basic navigation on a tablet

When you open a Web Client module on a tablet:

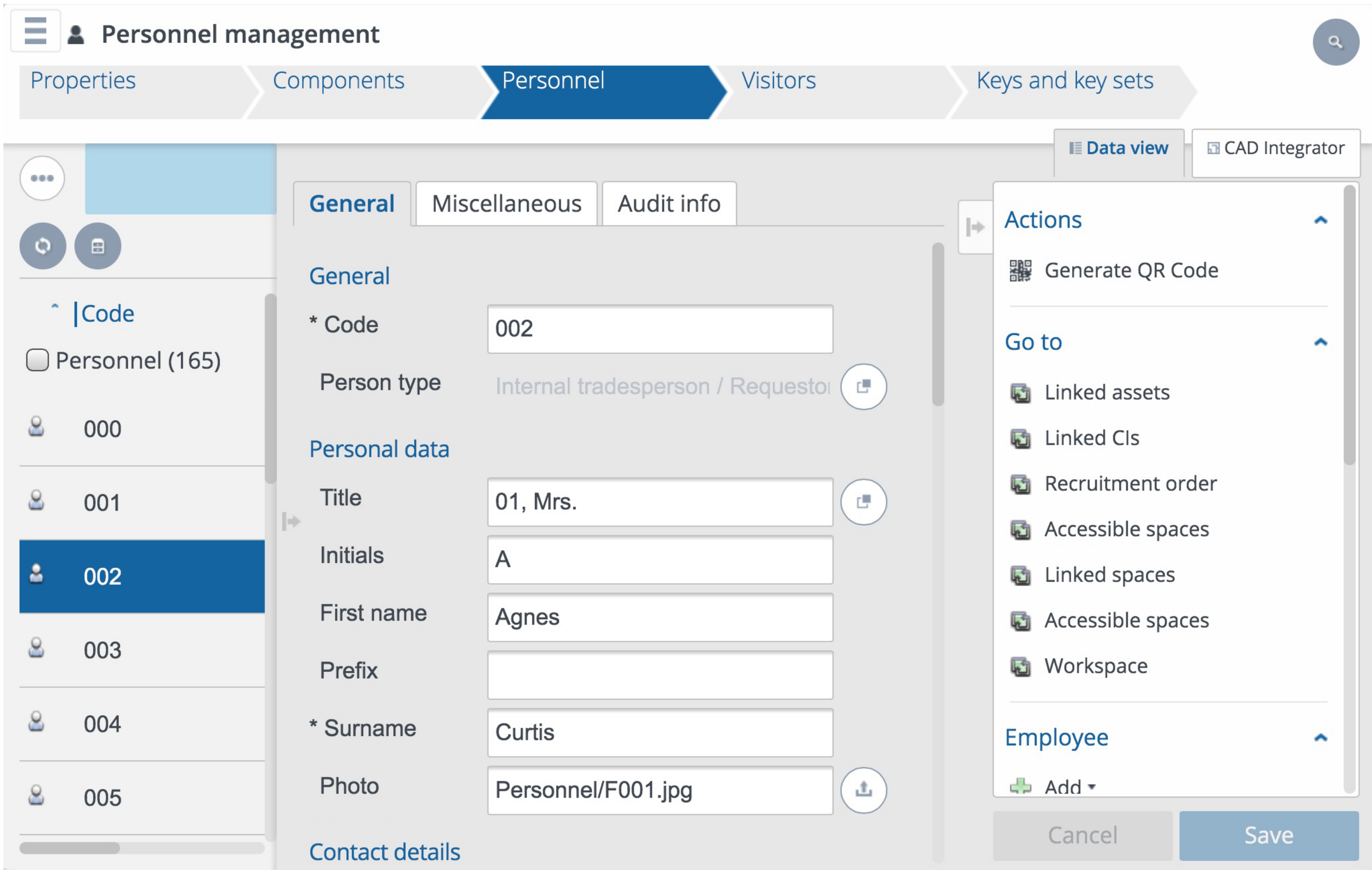
- the elements list is shown,
- the data panel is hidden,
- the action panel is shown minimized,
- the quick search and filter panels are available.

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. These settings are retained when you log in next time.

The following image displays a module open on a tablet with just the elements panel expanded. The action panel is minimized and only the corresponding icons are displayed.



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



Elements panel on a tablet

The elements panel is displayed, 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, refer to Elements panel .

> 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,
- 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

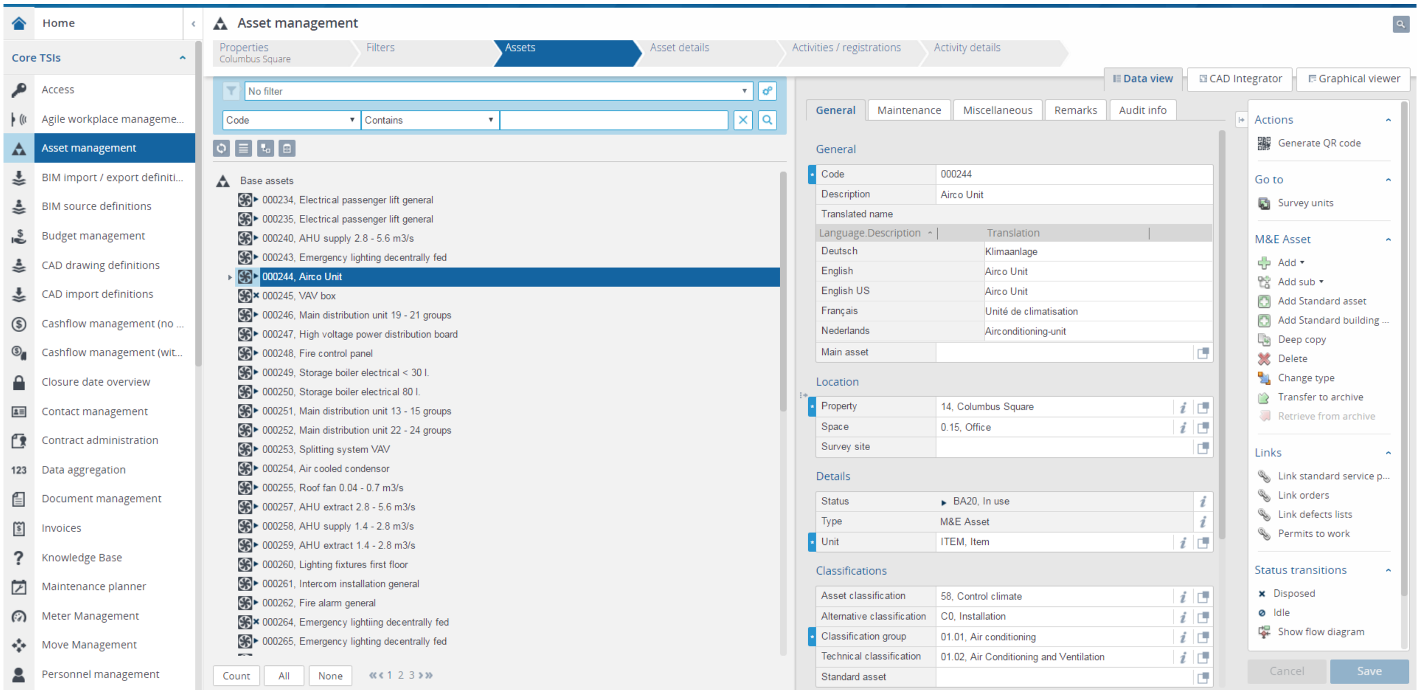
You can expand and collapse the action panel using the buttons on the top-left of the action panel. Collapse the action panel for a full view of the data panel. When the action panel is collapsed, only the icons corresponding to the actions are visible.

For more information on actions, refer to Action panel.

Standard features

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

Following is an example of a TSI in the Web Client:



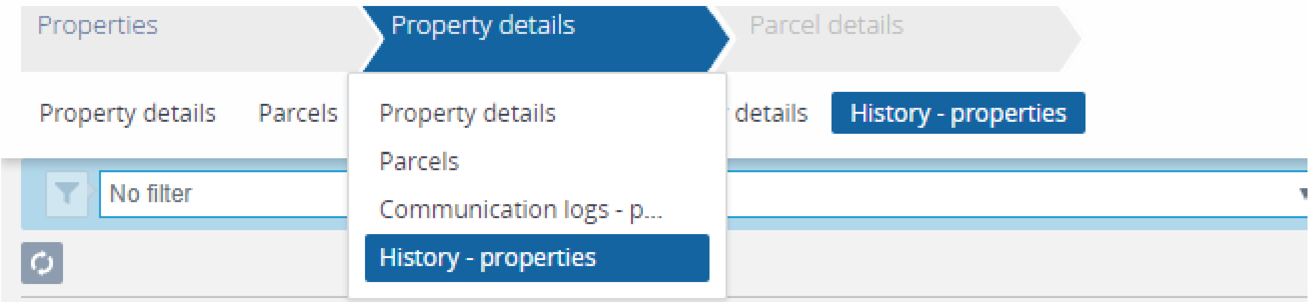
Planon ProCenter supports working with several keyboard shortcut keys to perform certain actions in the application.

For more information, refer to *Planon ProCenter-Shortcut Keys*.

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 are displayed.

When you hover over a selection level, a drop-down list of selection steps on that level will be displayed. You can also jump to a selection step by selecting it from this list. The currently active step on that level will be 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 make a preselection and have only the required data displayed.

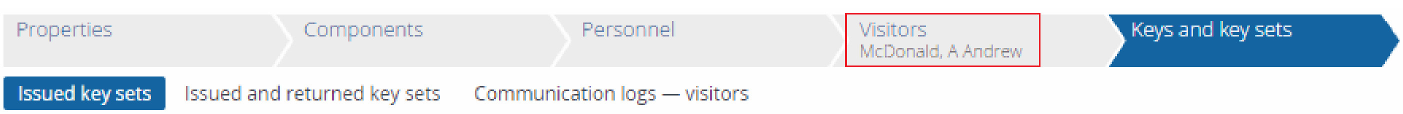
Elements panel

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 could be, for example, 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 will remain 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 the other, the selected element name in the previous level is displayed below the level name. If the text is too long, the full text is given in a tooltip.



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. Note that, only the relevant functions for the elements panel you are in are shown. For example, you may find more order related actions in **Service Manager**.

You can do the following 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 will be remembered even after logging out.

Element hierarchy

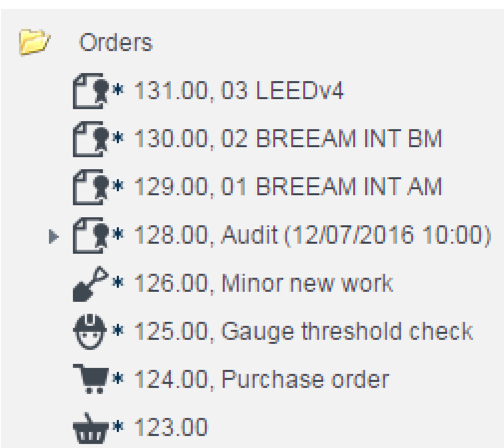
There are two element types in *Planon ProCenter*:

- Hierarchical elements
- Simple elements

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

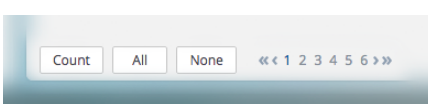
A simple element cannot be subdivided.
For example, Person.

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 will overwrite all data that would be automatically specified as a result of selections made on previous selection levels.

Footer bar



The footer bar has the following functions:

- **Count** - displays the total number of elements in the list.
- **All** - selects all the elements in the element list.

- **None** - deselects the selected elements.

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

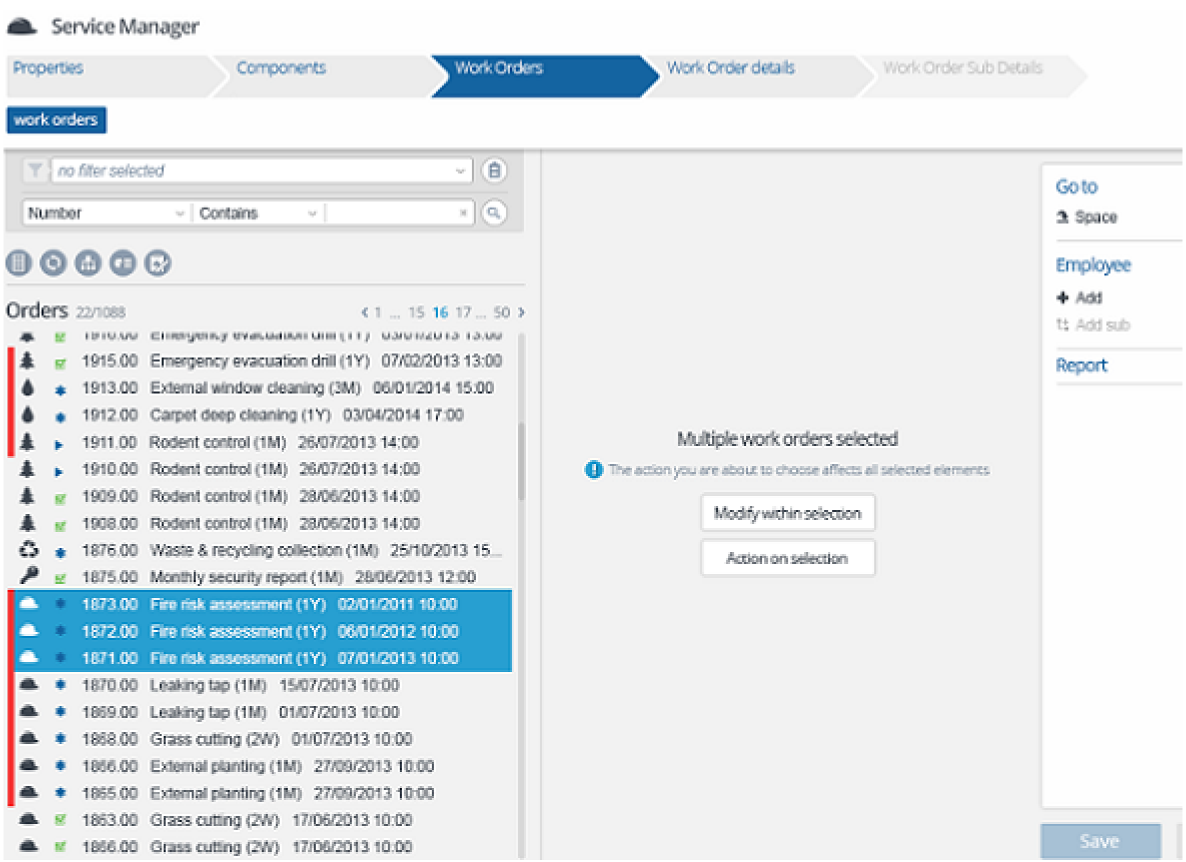
Action on selection

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.

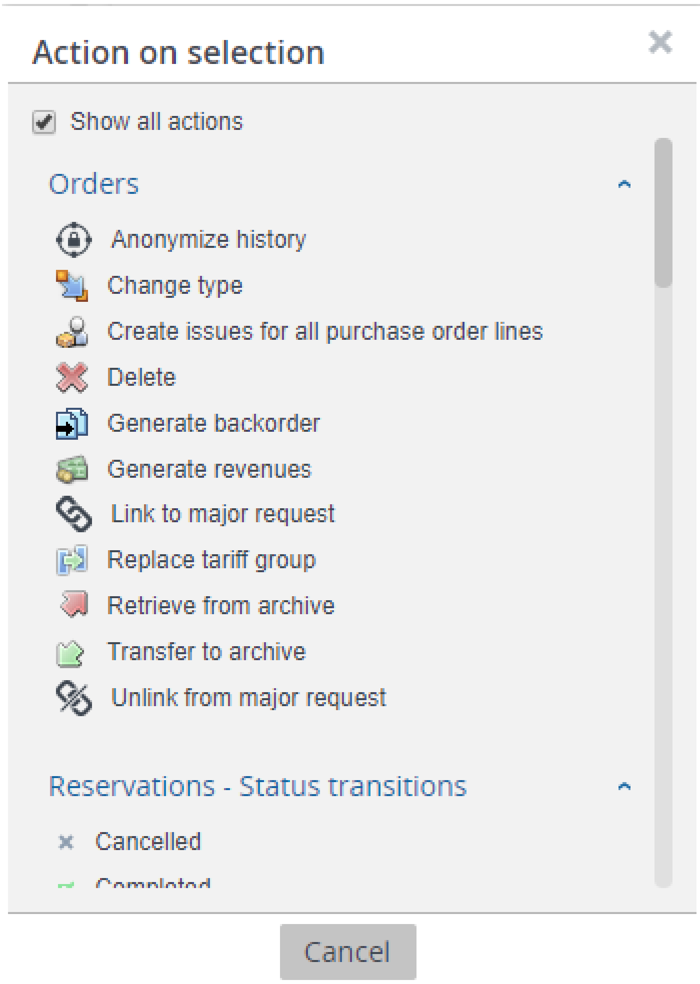
Procedure

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

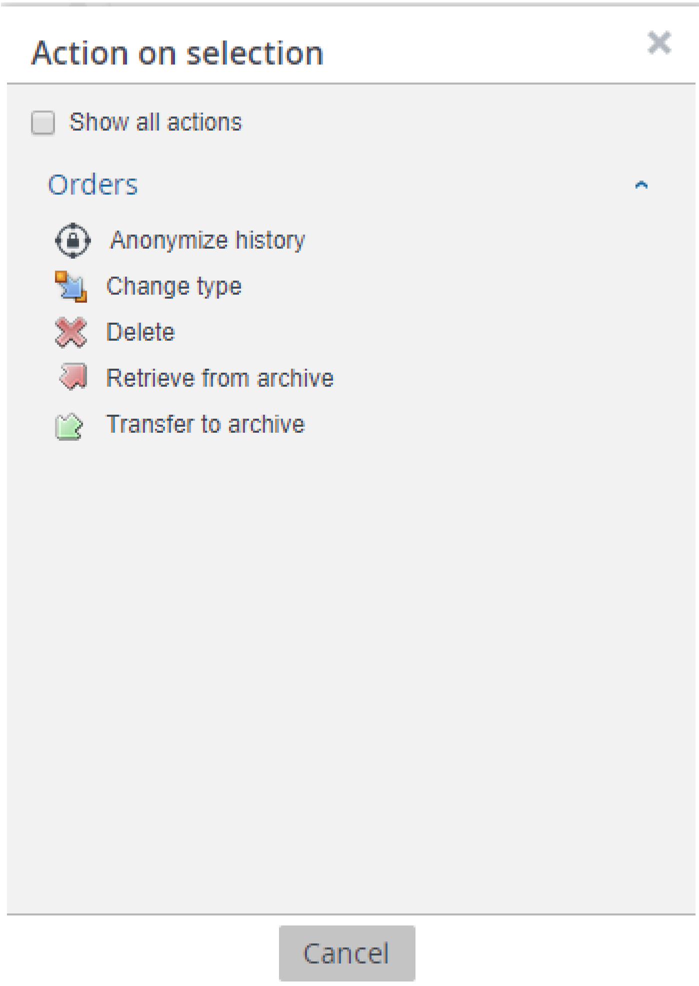


2. On the data panel, click **Action on selection**.
3. The **Action on selection** dialog box appears and displays relevant actions available for the selected elements.

   In the dialog box, the **Show all actions** option displays all actions/status transitions available for the selection as shown in the following image:



If you de-clear the **Show all actions** check box, only the actions available to all types in the selection will be displayed as shown in the following image:



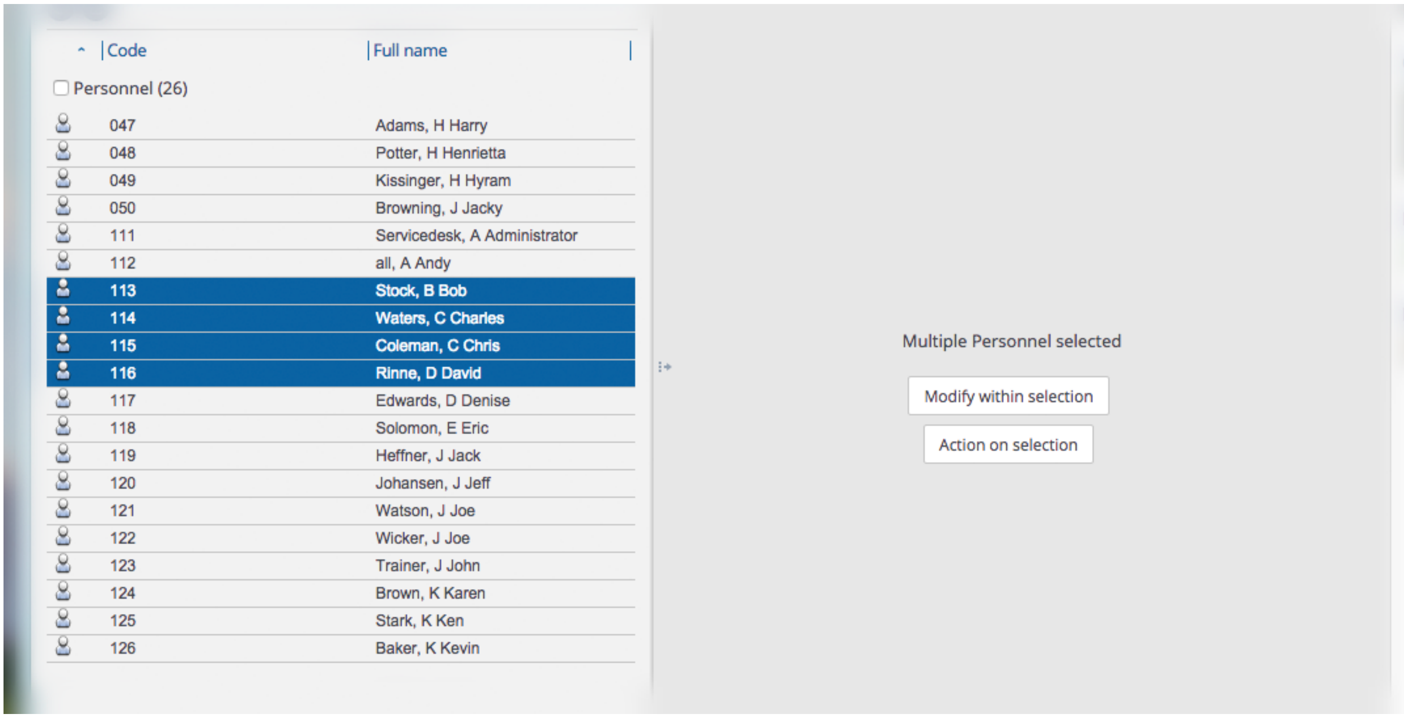
4. Select the action or status transition that you want to apply to the selected elements.
5. A **Question** dialog box appears.
6. Click **OK** to continue. The items are processed, as displayed by a progress indicator.

   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

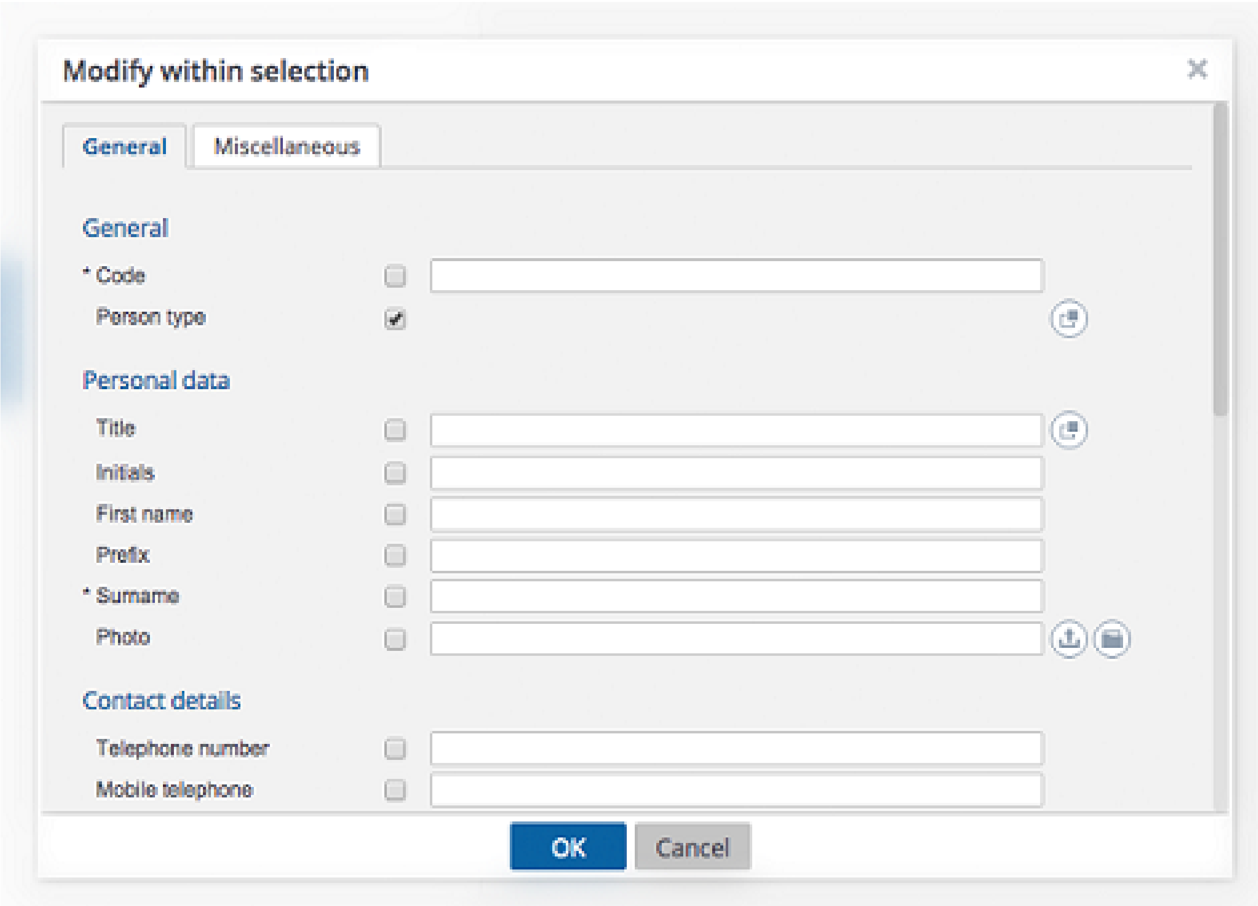
The **Modify within selection** option allows you to change the value of a field for multiple elements at the same time. This option becomes available in the data panel when you select multiple elements in a selection level in a TSI. You can change the values of all fields.



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 boxes of the field(s) you want to modify.
4. Enter field values in the selected fields.

   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.
5. Click **OK** to proceed. 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**.

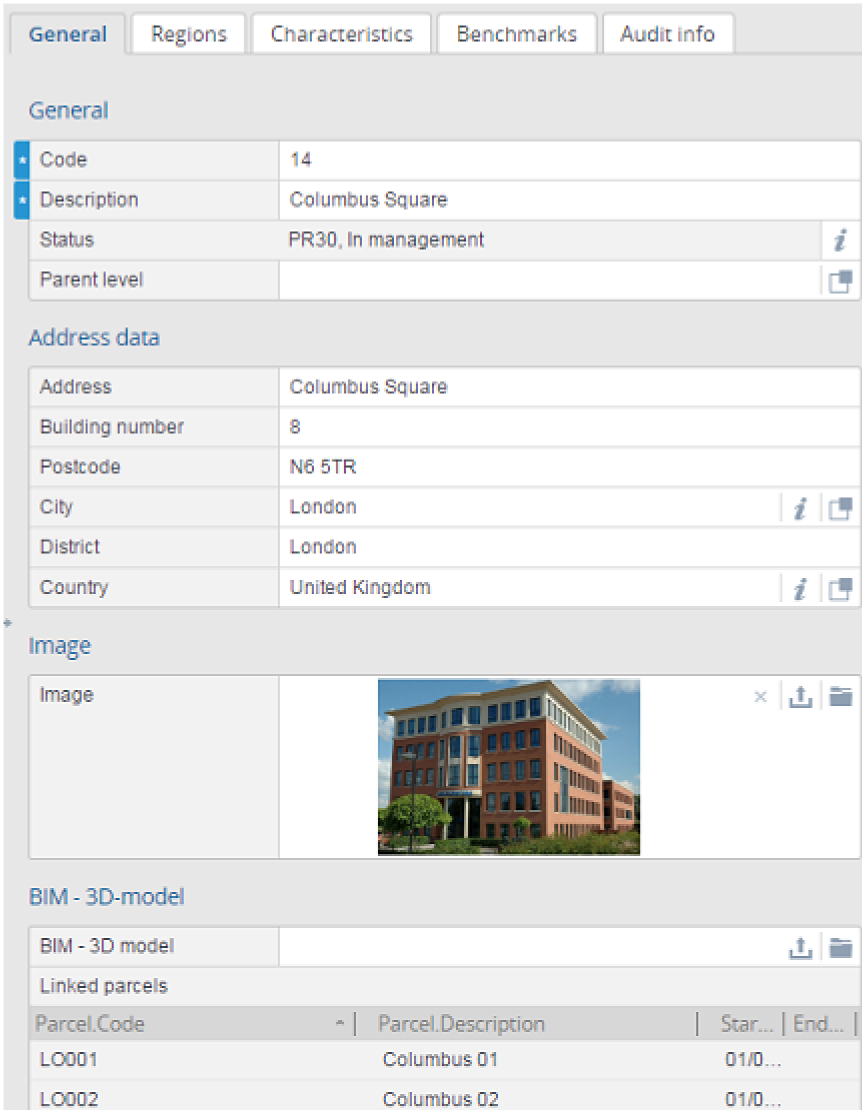
   It is possible to do calculations on number fields like add, subtract, divide or increase with a percentage.

   In case of a remainder when the integer is divided, the remainder is ignored and only the value of the quotient is considered. For example when 5 is divided by 2, the remainder, 1, is ignored.

Data panel

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

In the following example, you can see property data:



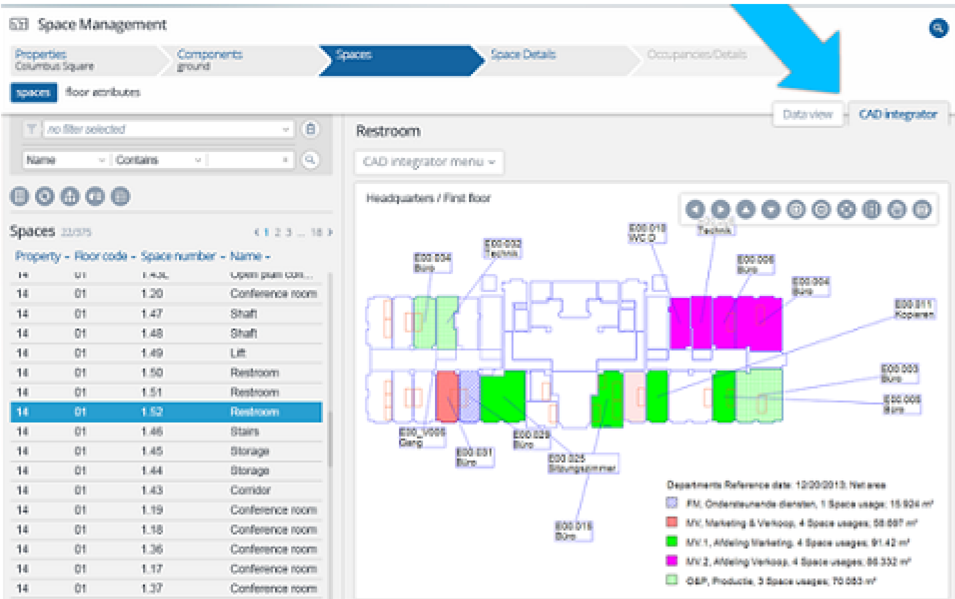
Detailed information about the selected element is grouped by headers in the data panel and the information is spread over different tabs. For example, **General** > **Address data**. This allows you to find the information you need about the selected element easily.

On the data panel, fields marked with an

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.

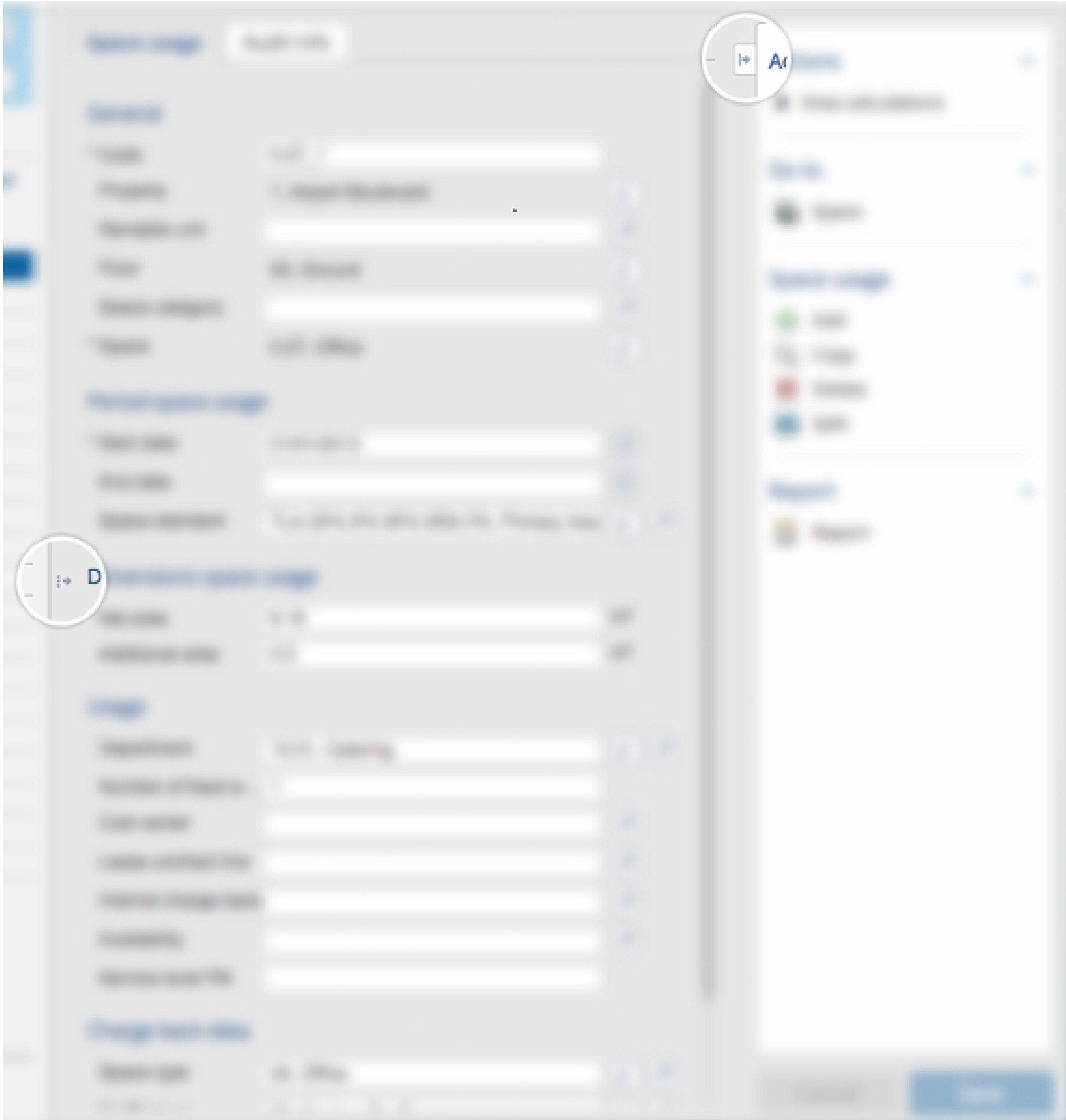
Some TSIs can have different data views. You can switch views on the upper right, just below the selection levels and steps. Example: **Data view** and **CAD Integrator**.



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, allow 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,

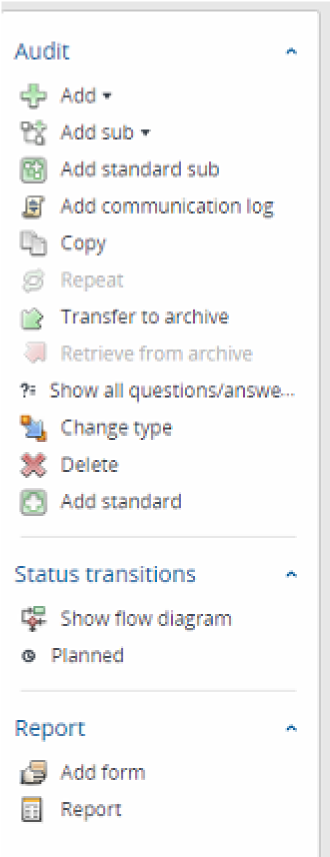
- For image type fields, the image is directly displayed in the data panel. You can use the **Clear / X** option to remove it. However, it will still reside in the WebDAV location.
- For document type fields, the **View** button is displayed. Depending on your browser settings, this button enables you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

The following image displays the actions available in **Service Manager** > **Work orders**.



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 element type

You can change the type of some elements, with the right authorization. For example, if you have to change the property type from a Wing, to a Complex, it can be done by using the **Change type** action.

View status flow

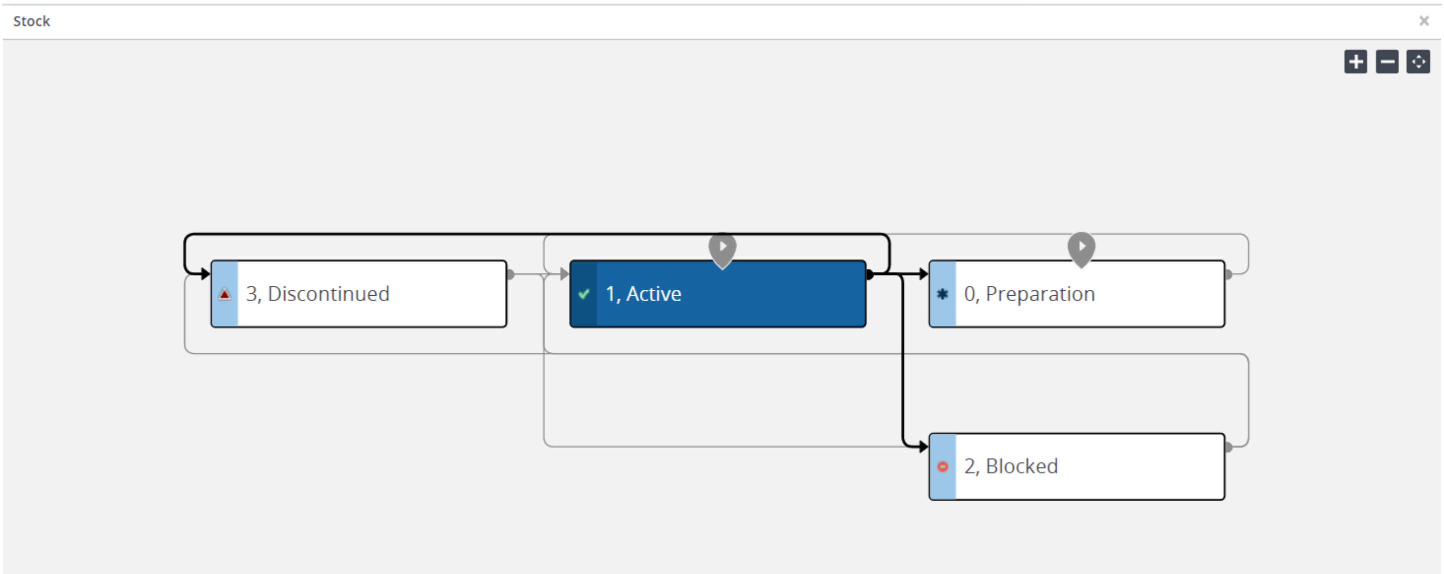
In Planon Web Client, you can view the complete status flow and the possible status transitions of elements such as, Reservations, Orders, Visitors, Contracts and so on.

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.

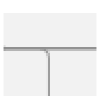
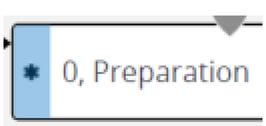
To view status flow of an element:

- 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.



Refer to the following 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.
	The blue bar in the status flow block displays the status icon. Here, the star indicates the **Preparation** status.

Components	Description
	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

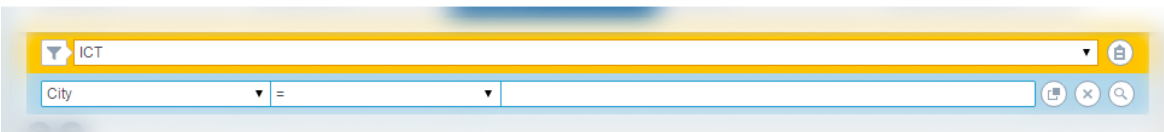
In Planon Web Client, searching can be done in various ways:

- **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

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.
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.

Operator	Description
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.

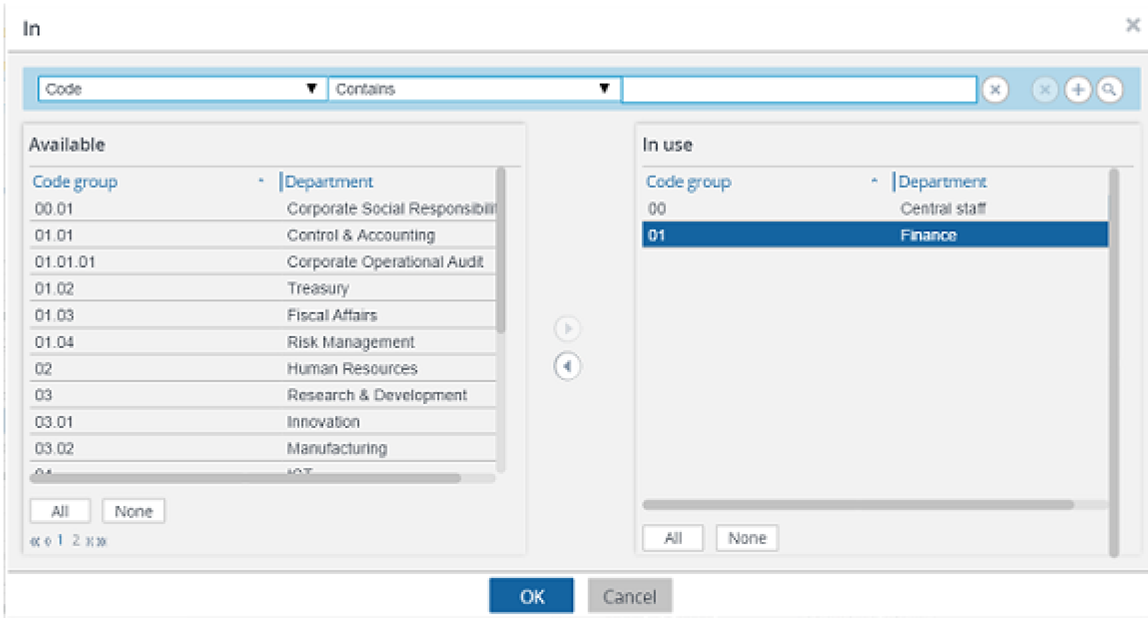
Using search operators

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**.

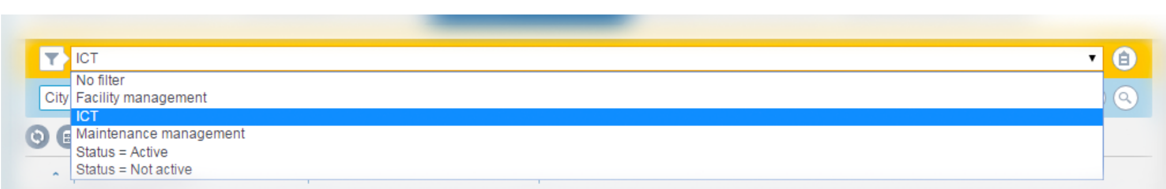
All persons belonging to the Central staff and Finance department are now displayed.

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.

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

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

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

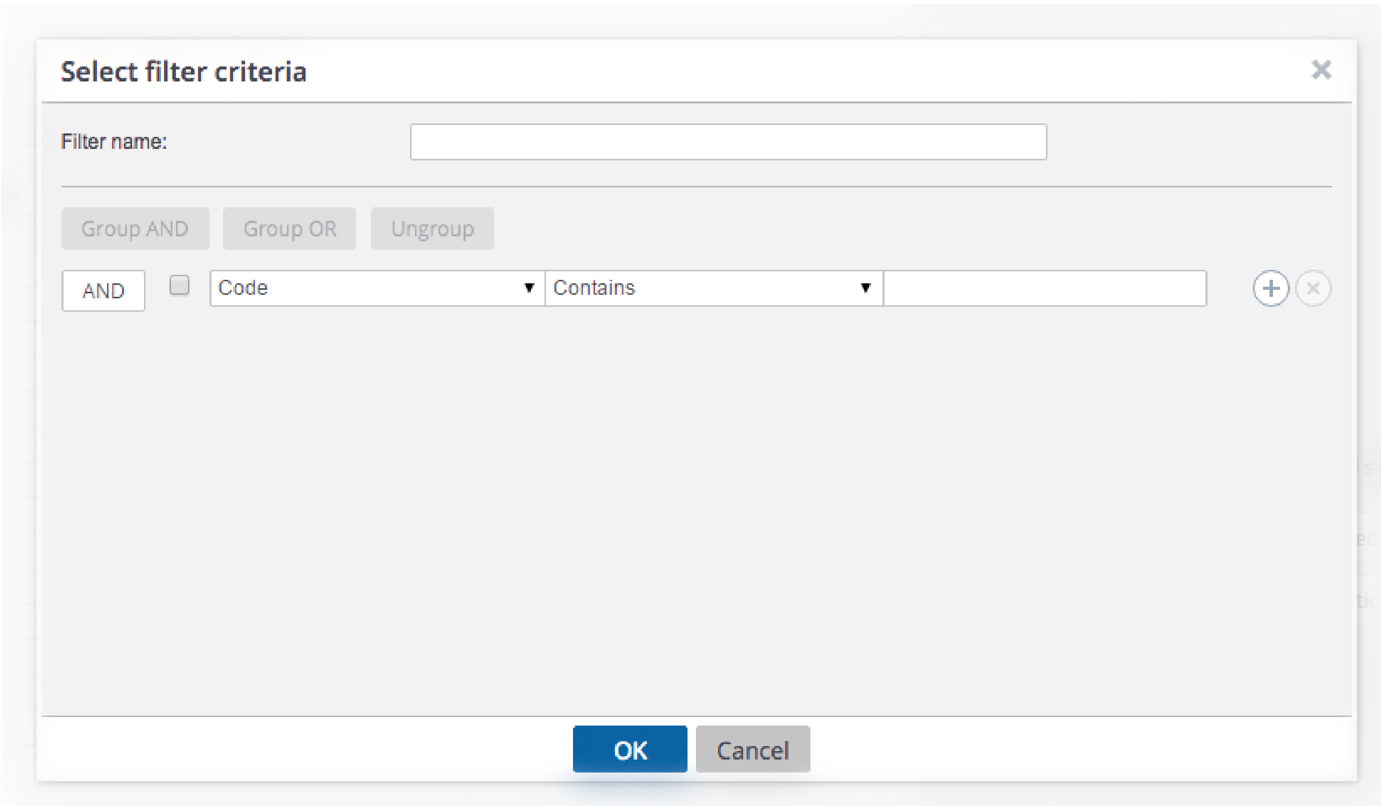
The filtering is available at every selection level and step in Planon ProCenter.

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 checkbox 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

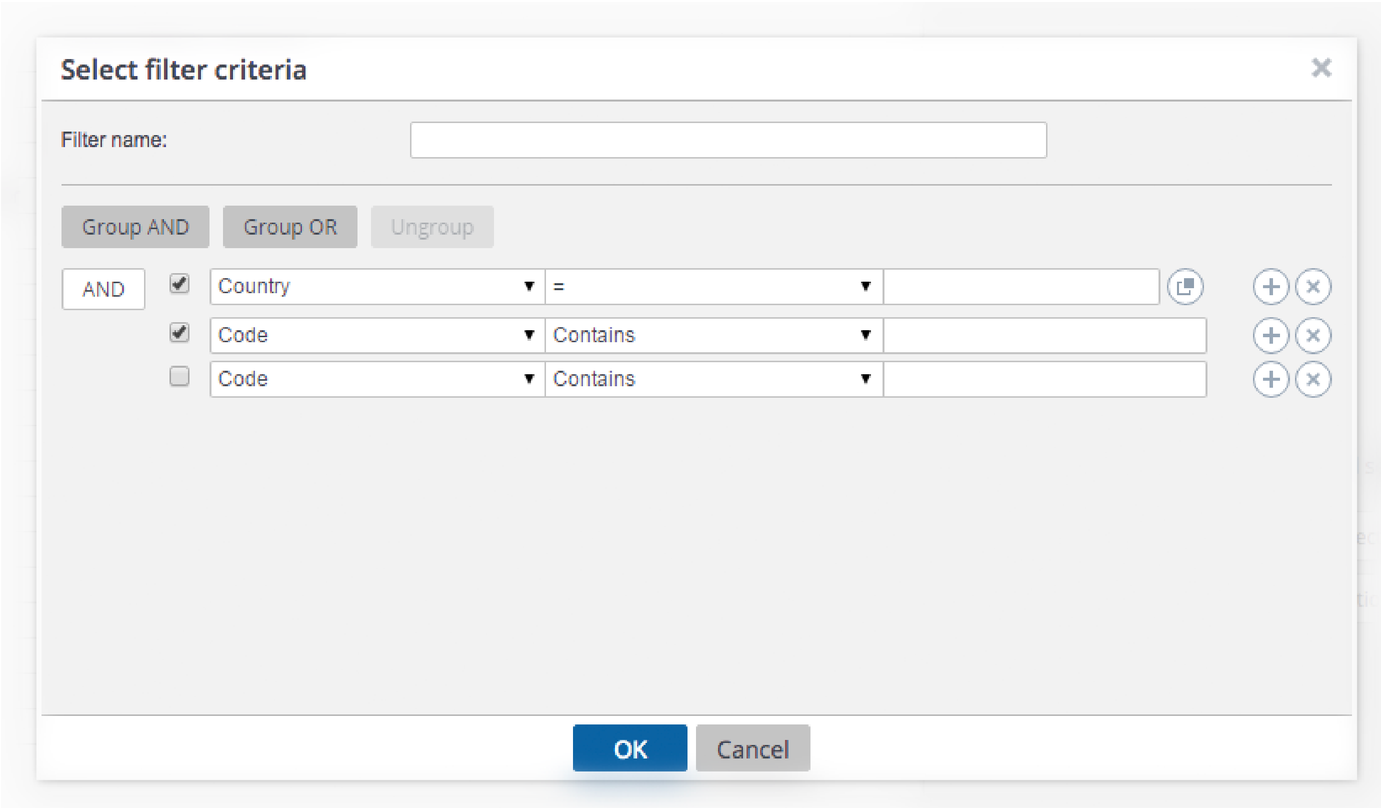
   filter and is deleted when you deactivate it.
3. Select the field for which you want to set a filter. For example, Person.
4. Select an operator, for example, '=.'
5. Fill in the person's name you want to filter on.
   If you want to add additional filter criteria, click the plus button and enter the 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 may consist of two 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

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.

Primary argument	Description
	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.
&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.

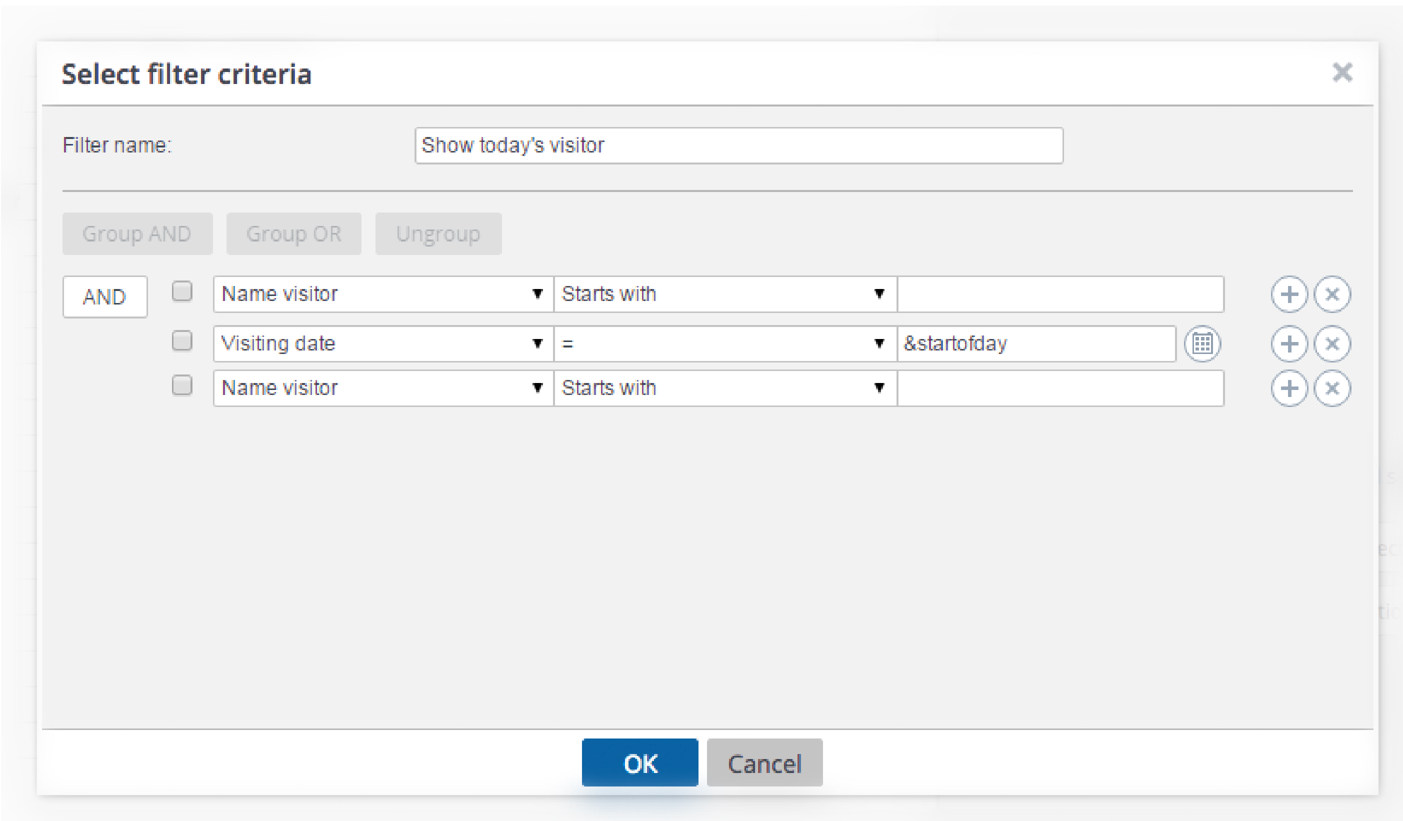
Secondary arguments must be preceded by a primary argument.

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.



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

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
&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.
&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. 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.

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 Essentials Edition . 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 etc.

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 types of elements in Essentials Edition , for example orders (all order types), properties, visitors, budgets, invoices and so on.

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

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 workspaces, 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 Web Client 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 Essentials Edition . 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. Semicolon (**;**) and Comma (**,**) are available as delimiters.
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.
Include header	Select **Yes** to include a header.

The **Delimiter** and **Output line break characters as** options are available only for CSV types. The **Include header** option is available for XLS, XLSX and CSV types.

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.

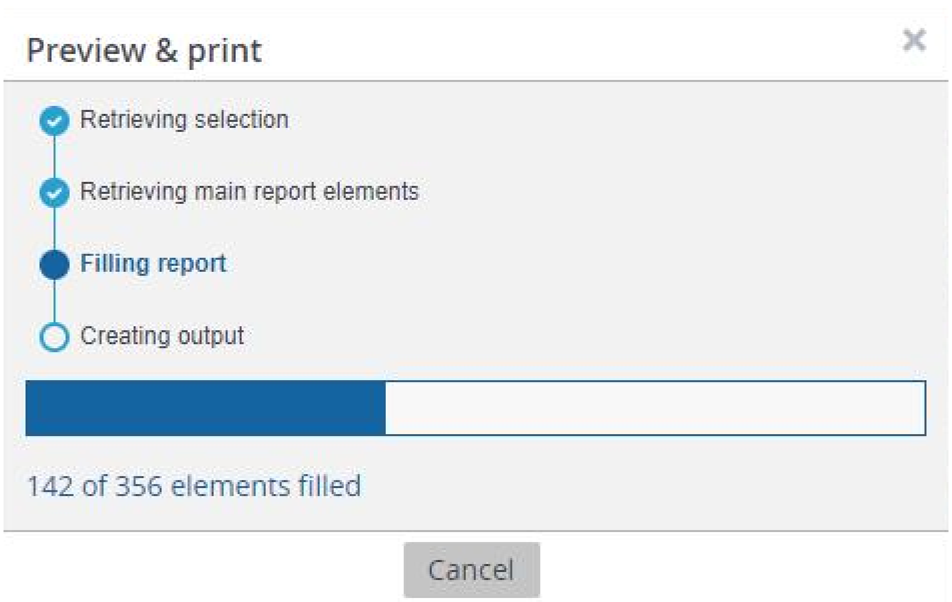
The mapping between Planon and Excel® is as follows:

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.



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.

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.

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. 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.

Field type	Description
	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.
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.
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**:

Field type	Description
	• 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. 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 in *Planon ProCenter*, for example a drawing or photograph of a property. You can clear, upload or select an image file using the  buttons respectively. Planon supports the image types .jpg, .jpeg, .png, .gif, .tiff, .svg, .bmp, and .ico. 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.  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.

The forms displayed on your site depend on how your company chooses to configure them for you. You can use the PSS features through the Planon Web Client interface.

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

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

Shortcut keys

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

> Shortcut keys are not supported on tablets or mobile phones.

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

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

Zoom in/out

Press key(s)...	To...
CTRL+	Zoom in (maximum font size 24 pt)
CTRL-	Zoom out (minimum font size 6 pt)
CTRL 0	Reset font size
CTRL+scroll	Zoom in or out

> 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
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

Press key(s)...	To...
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. 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 • Technical assets • Personnel • Contracts
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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