



PROJEQTOR **SCREEN CUSTOMISATION**

TECHNICAL DOCUMENTATION

VERSION: V 6.1

REFERENCE: PLUGIN – SCREEN CUSTOMIZATION

SUMMARY

INTRODUCTION	3
SETUP	3
GLOBAL STRUCTURE OF PLUG-IN	4
CHANGE FIELD ATTRIBUTES FOR...	5
CHANGE FIELD ATTRIBUTES FOR GIVEN TYPE	5
CHANGE FIELD ATTRIBUTES FOR GIVEN STATUS	6
CHANGE FIELD ATTRIBUTES FOR GIVEN PROFILE	7
EDIT FIELDS FOR AN ELEMENT	8
SELECT AN ELEMENT	8
EDIT EXISTING FIELD	8
CREATE FIELD	9
FORMATS	10
DROPDOWN LIST	10
CHANGE SIZE FOR TEXT AND NUMERIC FIELD	11
MOVE FIELD	11
ATTRIBUTES	11
DEFINE DEFAULT VALUE FOR FIELD	12
DEFAULT VALUE WITH EVALUATED FORMULA	12
CHANGE VISUAL ATTRIBUTES	13
DELATION	13
DELETE CUSTOM FIELD	13
RESET SCREEN DEFINITION	13
EDIT LIST	14
DEFINE NEW LIST FOR SELECT FIELD	14
THE CLASS	14
THE NAME	14
EDIT CUSTOM LIST CONTENT	15
DELETE CUSTOM LIST YOU CREATED	15
LIMITS AND CONSTRAINTS	16
PROGRESS SECTIONS SELECTION	16
PROGRESS SECTIONS CHANGE	16
CUSTOMIZABLE SCREENS	16
SEVERAL FIELDS ON SAME LINE	16
CHANGE HISTORY	17

INTRODUCTION

The objective of this document is to explain how to use the plug-in "screen customization".

With this plug-in you can, for a given screen:

- Change attributes of field: add "required", "hidden" or "read only" attribute
- Change size for text and numeric field
- Move field
- Create new field
- Define new list for select field
- Delete custom field you created
- Change attributes of field for given types, or for given status, or for given user profiles
- Define default value for field
- Create new Section
- Move / Hide section

You will find change history listing features at the end of this document.

SETUP

When acquiring a plugin, you get a .zip file. To install it, go to the Plugins Management screen.

Plug-ins

▼ installed plug-ins

	name	description	version	deployed date	deployed on	compatible since
	screenCustomization	Customization of screens	V6.0	02/01/2022	V9.4.2	V9.2.2
	translationApplication	TranslationApplication	V1.6	06/22/2019	V8.0.4	V6.5.0

▼ available plugins (local)

plug-ins (zip files) are searched in directory '/plugin'

no plugin available

add local plugin file

▼ available plugins (remote)

feature not available on this version

In the section of installed plugins, you have the list of plugins already in place with the version of the latter and on which version of ProjQtOr you installed it. Compatibility information is given.

In the available plugins section, click on the browse button to retrieve your .zip file.

▼ available plugins (local)

plug-ins (zip files) are searched in directory '/plugin'

	file	date	size
	screenCustomization_V6.0.zip	02/08/2022	490.8 KB

add local plugin file

Once the file is uploaded, it appears in a table.

Click on to install your plugin

Click on to view the plugin metadata.

Click on to cancel the installation of this plugin.

When the zip is installed, the application restarts. Go to the Plugin menu to access it.

GLOBAL STRUCTURE OF PLUG-IN


The plug-in screen has three parts:

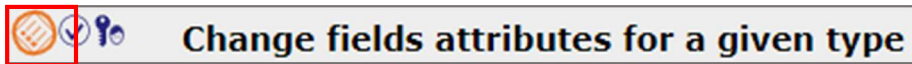
The screenshot displays the 'Screens customization' interface. The top bar includes a title 'Screens customization', a dropdown for 'element : Action', and a button 'Change fields attributes for a given ty'. Below this, there are checkboxes for 'reset screen to standard disposition', 'add new custom field', 'required', 'do not auto fill', 'read only', 'not hidden', 'unique', 'next on same line', and 'has default value'. The left panel shows a list of fields for 'Description', 'Treatment', 'Todo list', 'Linked Elements', 'Attachments', and 'Notes', each with a set of icons for configuration. The right panel shows a preview of the customized screen with sections for 'Description' and 'Treatment', each containing various form elements like text boxes, dropdowns, and checkboxes. Red arrows point from the text labels to the corresponding parts of the interface.

- On top: selection of element (screen to customize) and action buttons.
- On left: screen edition.
- On right: the result of the customization, as an example of what the screen will be.

CHANGE FIELD ATTRIBUTES FOR...

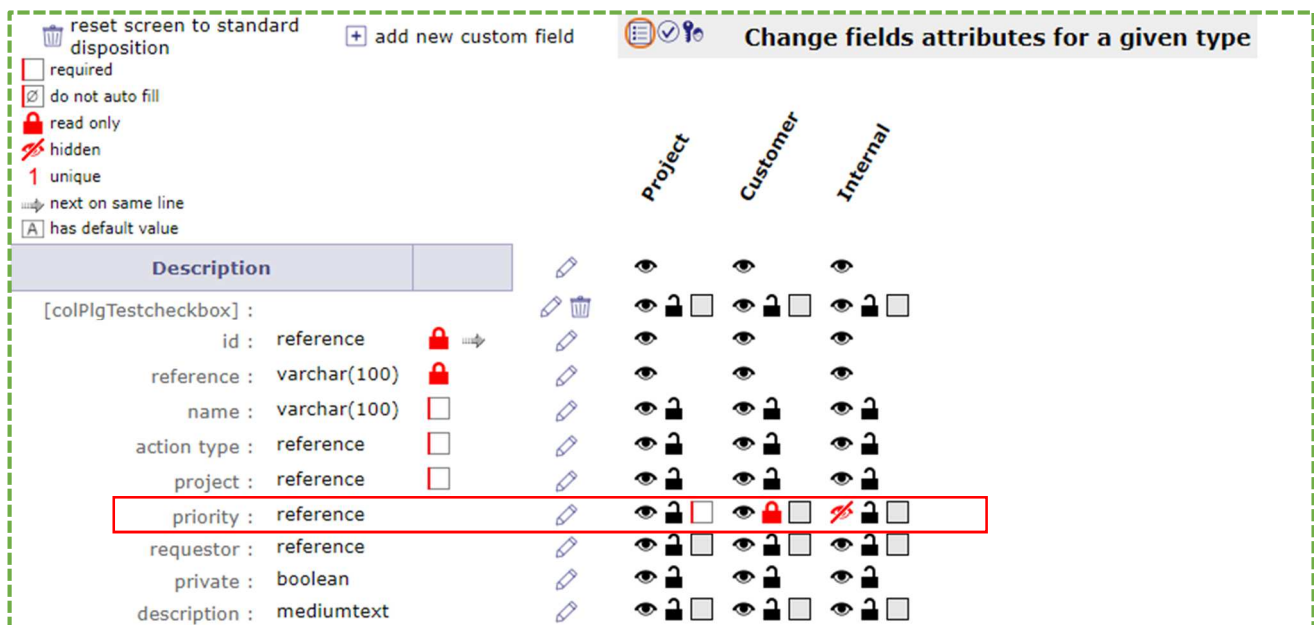
CHANGE FIELD ATTRIBUTES FOR GIVEN TYPE

Click on  in the upper section, to display the different types of the selected item.



You can define that some fields will be hidden or read-only or required for a given type.
Then just click on the corresponding attribute to enable or disable it.

Example for an action element:




	Project	Customer	Internal
id : reference			
reference : varchar(100)			
name : varchar(100)			
action type : reference			
project : reference			
priority : reference			
requestor : reference			
private : boolean			
description : mediumtext			

Field "priority" will be "required" for type "Project", "read-only" for type "Customer", "Hidden" for type "Internal"

Click on  to save the change.

Click on  to cancel the change.

CHANGE FIELD ATTRIBUTES FOR GIVEN STATUS

Click on , to display the different statuses of the workflow linked to the selected element.



You can define that some fields will be hidden or read only or required for a given status. Then just click on the corresponding attribute to enable or disable it.

Example for an action element:


reset screen to standard disposition
 add new custom field

Change fields attributes for a given status

☐ required
☒ do not auto fill
 read only
 hidden
1 unique
 next on same line
 has default value


Description		recorded	qualified	accepted	re-opened	assigned	in progress	paused
[colPlgTestcheckbox] :								
id : reference								
reference : varchar(100)								
name : varchar(100)								
action type : reference								
project : reference								
priority : reference								
requestor : reference								
private : boolean								
description : mediumtext								

Field “priority” will be “required” for status “recorded”, “read-only” for status “qualified”, “hidden” for status “accepted”

Click on  to save the change.

Click on  to cancel the change.

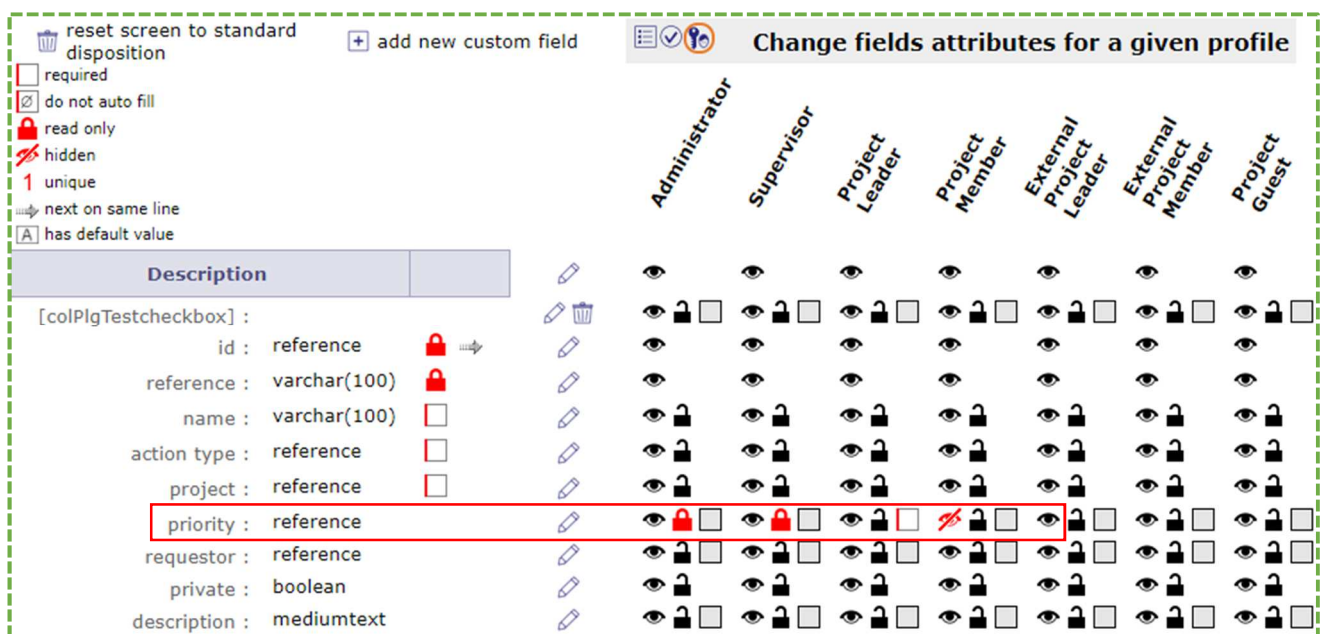
CHANGE FIELD ATTRIBUTES FOR GIVEN PROFILE

Click on  in the upper section, to display the different profiles.



You can define that some fields will be hidden or read-only or required for a given profile. Then just click on the corresponding attribute to enable or disable it.


Example for an action element:



		Administrator	Supervisor	Project Leader	Project Member	External Project Leader	External Project Member	Project Guest
reset screen to standard disposition								
<input type="checkbox"/> required								
<input checked="" type="checkbox"/> do not auto fill								
read only								
hidden								
<input type="checkbox"/> unique								
next on same line								
<input type="checkbox"/> has default value								
Description								
[colPlgTestcheckbox] :								
id : reference								
reference : varchar(100)								
name : varchar(100)								
action type : reference								
project : reference								
priority : reference								
requestor : reference								
private : boolean								
description : mediumtext								

Field “priority” will be “read-only” for profile “Administrator” and “Supervisor” and “required” for profile “Project Leader” and “hidden” for project member.

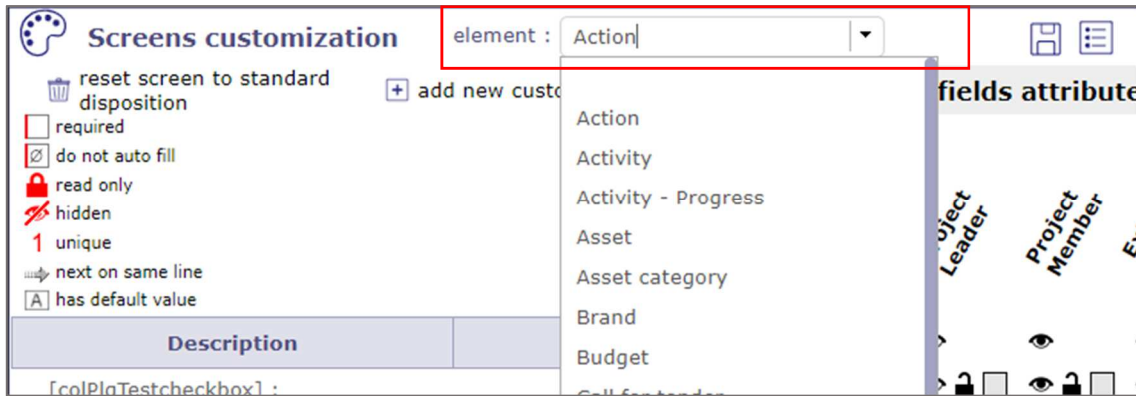
Click on  to save the change.

Click on  to cancel the change.


EDIT FIELDS FOR AN ELEMENT

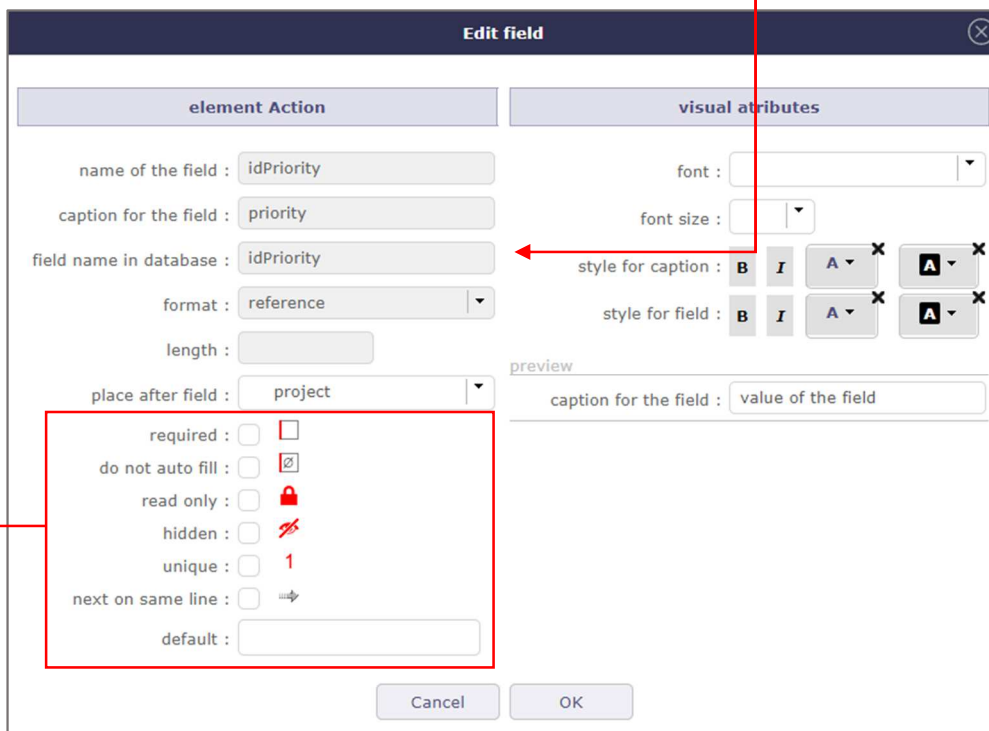
SELECT AN ELEMENT

Select an item on top list to display the corresponding data.



EDIT EXISTING FIELD

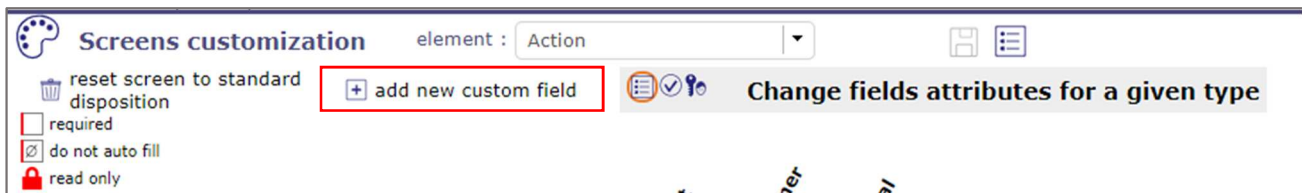
Click on edit button  for the corresponding field will open change pop-up. You cannot edit all attributes of existing fields. These fields will be **grayed out**.



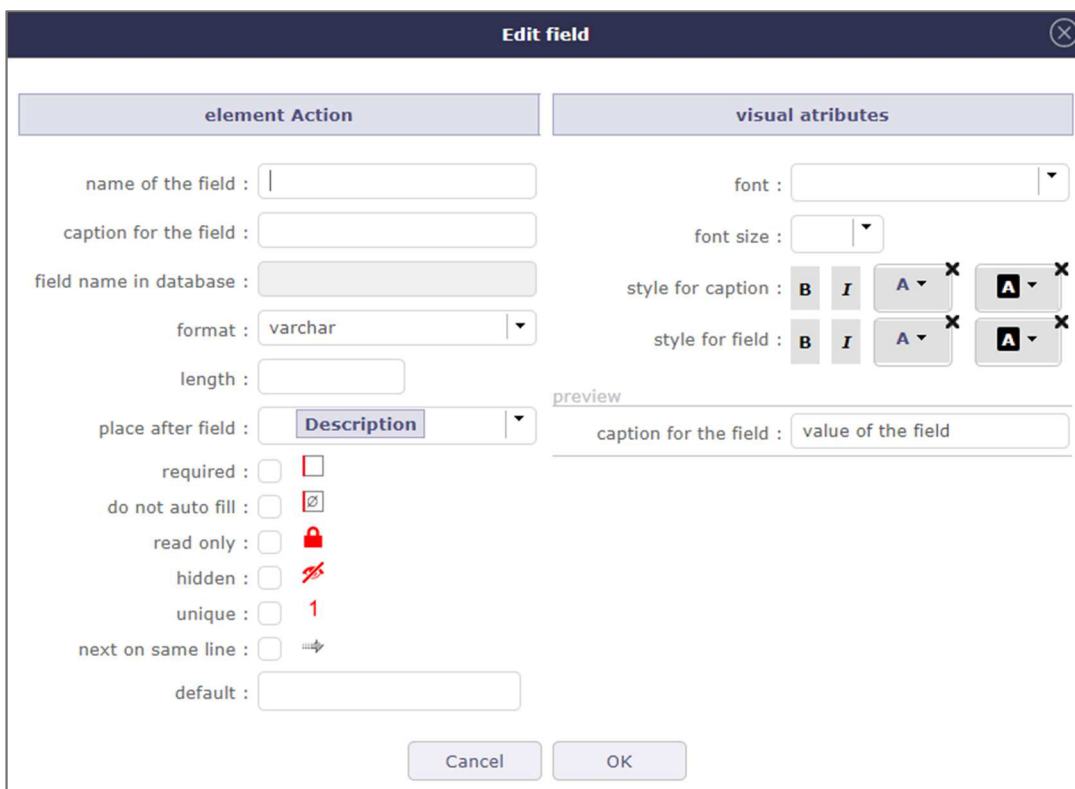
You can then check on of the corresponding attribute to apply it:

CREATE FIELD

Click on edit button  to add a new field.



This will open change pop-up.



You will then define properties of the field, with same behavior as for editing an existing field, except that you will not have to define field name.

Name of the field: Name your field

Field name must be alphanumeric, starting with alphabetic character in lowercase and without space. Only exception is field "Origin" that can be added to insert reference to external origin object.

Caption for the field: fill in the name of the new one that will appear on the screen

Field caption is not mandatory if you define a field name that correspond to an existing caption. It is even forbidden in this case.

Field name in database: you have no control over this field, it is created based on the name

FORMATS

Varchar: character strings

Medium text: writing space with a text editor

Reference: specific format for list

Int: Relatively large integer values

Decimal: Decimal value of 2 digits separated by a comma

Boolean: check box

Date: date format with display of a calendar

Datetime: date format with display of a calendar and time slots

Section: New section (as description, treatment...)

DROPDOWN LIST

You can create fields as lists with the **reference** format.

Name your fields name with the name of an existing object in ProjeQtOr that will serve as a list or a new list you defined, see: [edit list](#).

The data type must be "reference". This is a specific format that will be stored in database as int(12).

Example for calling a contact list

Name of the field / database: idContact

caption for the field: decision maker

field name in database: idContact

The screenshot shows a 'Validation' dialog box. It contains a table with the following data:

Field	Value
decision maker	[Dropdown menu]
status	<input checked="" type="checkbox"/>
decision date	[Date field]
origin	Steering

The dropdown menu for 'decision maker' is open, showing three options: 'external business leader one', 'external project leader one', and 'Steering'.

To create two fields referring to the same class, you must use the format yyyy__Xxxx.

Example for calling two resources list

For the first field:

Name of the field/ database: idResource

caption for the field: responsible

For the second field:

Name of the field: junior__idResource

caption for the field: junior responsible

CHANGE SIZE FOR TEXT AND NUMERIC FIELD

Then you can resize text (varchar) and numeric (integer, numeric or decimal) fields.

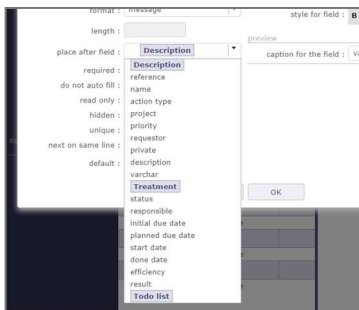
Pay attention that if you reduce size, existing data in the corresponding column may be truncated.

Length for varchar: maximum number of characters allowed – 4000-character max

Length for int: -2^{31} ($-2\ 147\ 483\ 648$) à $2^{31}-1$ ($2\ 147\ 483\ 647$) = 4 octets

Length for decimal: -2^{31} ($-2\ 147\ 483\ 648$) à $2^{31}-1$ ($2\ 147\ 483\ 647$) = 4 octets

MOVE FIELD



Place after field: to move the field after the corresponding field

You can for instance select “Description” section to move the field at first place.

Some fields are displayed on the same line and if may give weird result moving alter these fields.

You cannot create a field after the closed or canceled fields.

It will have to be created before, i.e., after done and then move the closed field or the canceled field.

ATTRIBUTES

Required: the field becomes mandatory

Do not auto fill: for required field, the value is not automatically set to default value (first item)

Read only: field cannot be modified

Hidden: field is not displayed

Unique: the field must have unique value

Next on the same line: will display the next field on the same line (without a caption).

That these attributes are exclusive: a field cannot be “required” and “hidden”

DEFINE DEFAULT VALUE FOR FIELD

Change the “default” value to enter value for the field on new items.

The default value is always a textual field.

For **Boolean field**, enter ‘on’ to set it checked by default.

For **Date, Date Time, reference type fields**, there is very little point in setting the default value as a static value on such fields so, the default value must not be filled in. An error message will notify.

If you just need it, enter it in textual field, just enter ‘2017-01-01’ as default value.

To have value that will be calculated, you will use the evaluated formula.

DEFAULT VALUE WITH EVALUATED FORMULA

It is possible to define an evaluated formula as default value.

Just enter ‘####EVAL####’ followed by some PHP code that will be evaluated. You just need to write an expression that can be evaluated as the value of a string.

If you write:

‘####EVAL####myEvaluationFormula’

then

\$value=myEvaluationFormula; must be a valid PHP expression.

Every function available in ProjeQtOr can be used as evaluation formula.

Evaluation formula	Evaluated value
####EVAL#### date('Y-m-d')	Current date
####EVAL#### addDaysToDate(date('Y-m-d'),7)	Current date + 7 days (next week)
####EVAL#### \$sqlList::getNameFromId('Profile',getSessionUser()->getProfile())	Get the name of the profile for current user
####EVAL#### (getSessionUser()->isResource)?getSessionUser()->id:null;	If current user is a resource, get its ID (for instance to set responsible)
####EVAL#### \$this->field1 + \$this->field2	Concatenation of field1 and field2

If you define a default value for a field that is “hidden” (always hidden, not hidden depending on type, status or profile), this field will be calculated on each save operation. So, default value then becomes a calculated value.

CHANGE VISUAL ATTRIBUTES

Edit field and change values for visual attributes on right part of edit pop-up.

The 'visual attributes' dialog box contains the following elements:

- font :** A dropdown menu showing 'Courier New'.
- font size :** A dropdown menu showing '12'.
- style for caption :** Buttons for bold (B), italic (I), text color (A with a color swatch), and background color (A with a color swatch).
- style for field :** Similar buttons for bold (B), italic (I), text color (A), and background color (A).
- preview :** A section showing the text 'caption for the field : value of the field'. The text 'caption for the field :' is highlighted with a red box.

You can change font and font size for both caption and field.


Then you can change some styling separately for caption or for field: bold, italic, text color, background color.

Note that some fields do not provide access to visual attributes such as sections or checkboxes.

The result will be displayed in the “preview” part.

DELETION

DELETE CUSTOM FIELD

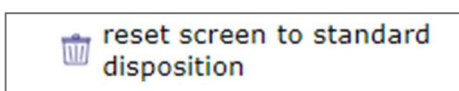
Click on delete button  that appears beside your custom field.

The screenshot shows a screen definition editor with a list of fields. A red arrow points to the field 'my field : varchar(100)'. To the right of the fields is a toolbar with icons for edit, delete, and visibility. The delete icon (trash) is highlighted with a red box.

A confirmation message will appear and field can then be removed. Pay attention that data existing in the corresponding column will be lost. You can only delete fields you added. Existing fields can only be hidden, never deleted.

RESET SCREEN DEFINITION


You can get back to standard version of the screen with dedicated button:

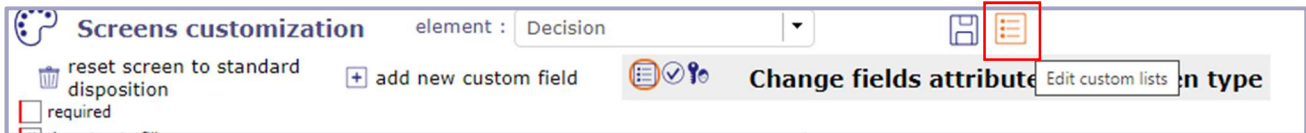


This will revert all changes made to the screen to retrieve the standard version of the screen.

Attention: that this will delete custom created fields, with all their data stored in the database.

EDIT LIST


Click on “custom lists” button  to access the custom lists management.



DEFINE NEW LIST FOR SELECT FIELD

The screen display changes to that dedicated to lists.



Click on “new list” button  to open the list creation pop-up.

Just define the class and the name of the list.

After creating the list, you can directly edit its content.

Add new custom list

class of the list :

It is the name of the new object class for your custom list.
This name must contain only alphabetic characters (without spaces) and must start with an uppercase.
Example : *MyList*
You will refer to this list creating a field named 'idClass' (in the example 'idMyList')

name of the list :

It is the name of the list as it will be displayed in edition screen for the list

Cancel

OK

THE CLASS

The class is the name of the new object class for your custom list.

This value must be a valid PHP class name and so contain only alphabetic characters (without spaces) and must start with an uppercase character.

Example: MyList.

You will refer to this list creating a field named 'idClass'. In the example: idMyList


THE NAME

The name is the name of the list as it will be displayed in edition screen for the list (see below).



EDIT CUSTOM LIST CONTENT

Just select your custom list if the selector.

Select list to edit :

My sponsor (MySponsors) 

My sponsor (MySponsors)



name

You will then be able to edit content of the list like any other list in ProjQtOr.

Custom lists

Select list to edit : My sponsor (MySponsors)

3 [menuMySponsors]

id

name

order

closed

1	Sponsor one		<input type="checkbox"/>
2	Sponsor two		<input type="checkbox"/>
3	Sponsor three		<input type="checkbox"/>

My sponsor

▼ Description

id #

name

sort order

closed ☐

DELETE CUSTOM LIST YOU CREATED

Select your custom list if the selector and click the delete

Pay attention that all data stores for this list will be lost.

You cannot delete a list used as a custom field in a screen: you have to remove it first.

LIMITS AND CONSTRAINTS

PROGRESS SECTIONS SELECTION

Progress sections are not included in main screen definition. They have their own selection in the list. For instance, for "Activity", "progress" section of activity cannot be changed through the "Activity" selection. You must select the "Activity - Progress" item in the list.

PROGRESS SECTIONS CHANGE

Due to very strict positions of fields in tabular view of progress sections, it is not possible to add new fields in these sections, nor to move fields in this section. All is possible is to change attributes of fields, for instance to hide some of them.

CUSTOMIZABLE SCREENS

Not all screens are available for customization. For instance, the parameters value lists are not available. This is mostly because these screens are very simple and do not need customization. But it is also because some technical structure has to be defined in standard framework for objects in order to be customizable. Most of the important objects have been processed, but some may be missing for your needs. Don't hesitate to post a request in ProjQtOr forum for an addition in the selectable items.

SEVERAL FIELDS ON SAME LINE

Sometimes, several fields are displayed on the same line.

For instance, "id" and "reference" are always displayed on first line.

If you hide one of these items or insert an item between them, you may face unexpected behavior... or not. Just try, but be aware that you may have to revert your change if something weird happens.

CHANGE HISTORY

Feature	Version	Compatibility ProjQtOr V°
Change the attributes "readonly", "hidden" and "required"	V1.0	V5.2.3
Change the size of a text (varchar) or numeric field		
Move a field		
Add a new field		
Delete a field		
Manage Custom Lists		
Change the attribute “hidden” depending item type		
Control of field name format (for new field)	V1.1	V5.2.3
Edit and customize labels	V1.2	V5.2.3
Reset customization to return to standard screen	V2.0	V5.2.3
Bug fixings	V2.1	V5.2.3
Hide a column if all elements are hidden	V2.1	V5.4.0
Hide a line if all elements are hidden		
Define a default value	V3.0	V6.0.3
Define attribute “hidden” depending on status of the item		
Define attribute “hidden” depending on profile of user		
Be able to hide a "label"		
Hide the label for hidden fields in a table display format		
Add WorkElement to customizable items (work part of tickets)		
Move the label with the fields in a table display format		
Bug fixings about moving a field in a table		
Hide headers for fields hidden by type	V3.1	6.0.6
Change the attribute "readonly" for a given type, status or profile	V4.0	6.2.2
Change the attribute "required" for a given type, status or profile		
Hide a section		
Hide a section for a given type, status, or profile		
Be able to specify the default value “on” for a boolean field		
Hide mandatory fields for a given type, status or profile		
Manage “readonly” with a default value as calculated field		
Anomaly when customizing Meeting if Live Meeting plugin is installed	V4.1	6.2.2
Manage sections: create new section / move section / hide section	V5.0	6.4.0
Style customization: style for caption and field (color, font, ...)		
Specify that next field is on same line		
Retrieve getFieldAttributes from parent	V5.1	
Forbid some key words (key, select, table, ...)		
Customization of Product Version fails		
Left part never completely displayed	V5.2	
Issue saving with PHP 5.3		
Adding a numeric field removes captions for others		
Own and up for a section field: fatal error		
When increase size of Activity name, cannot import name with new size		
Avoid some reserved word on name for fields	V5.3	
Possibility to create field "color		
Error when hiding "Restrict Type" Section		

Add a "Unique" attribute that verifies the uniqueness of the value	V6.0	V9.2.4
Indicate "calculated field" if default ### EVAL ### and read only		
Control unicity of field name (without case)		
Change label of multiline fields if first is hidden		
New attributes on objets not included on custo		
Fix potential issues on Contact custo		
Where remove field (or all) remove columnseletor		
Return to current object class		
On custom lists, remind name of class		
Impossible to move field ID		
Cannot change attributes for Activity Validated start date		
When moving field after other, bad place if _lib exists		
Attributes (hidden) on Project synthesis on Organization fails		
Cannot hide "project code"		
Manage _lib_		
Screen custo : create field with format decimal, length 10,4 => stored length is 10,0		
Error after adding Default Value		
Incorrect section name		
Default value for list not taken into account		
Trim default value for non string fields		