PROJEQTOR
SCREEN CUSTOMISATION

TECHNICAL DOCUMENTATION

SUMMARY

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.

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 ProjeQtOr you installed it. Compatibility information is given.

In the available plugins section, click on the browse button to retrieve your .zip 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
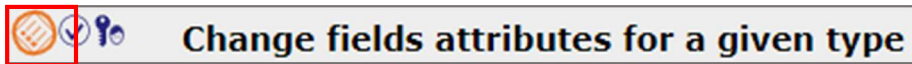
The plug-in screen has three parts:

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:

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:

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

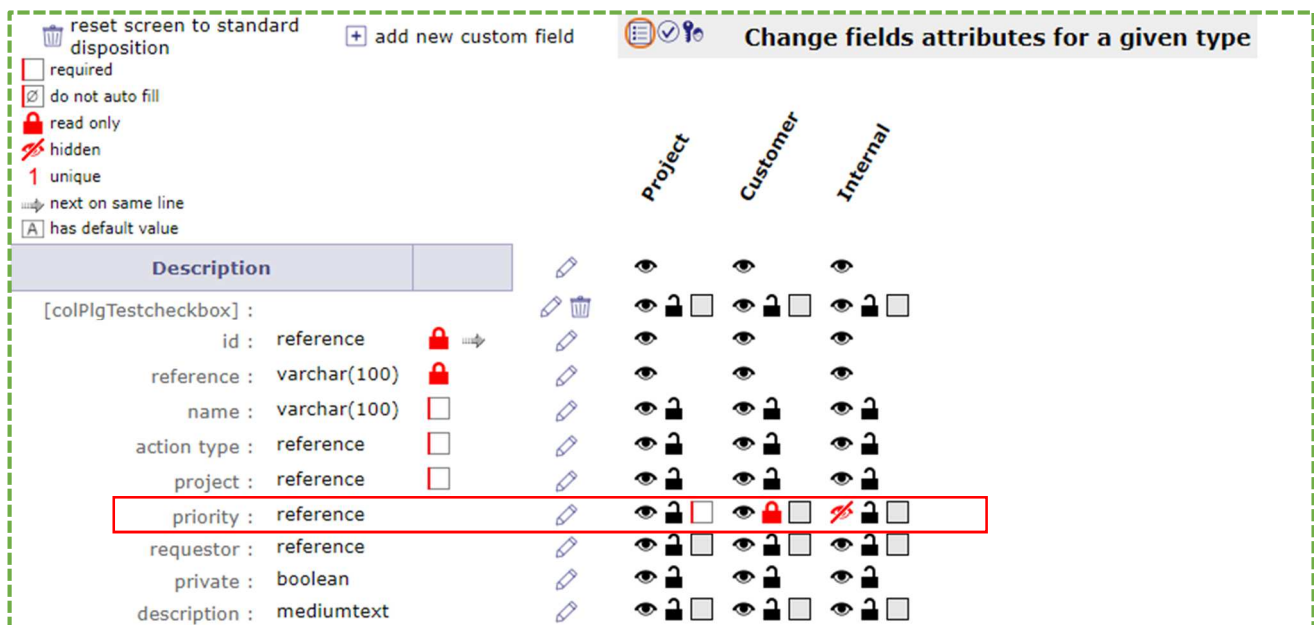Click on 💾 to save the change.

Click on ↺ to cancel the change.
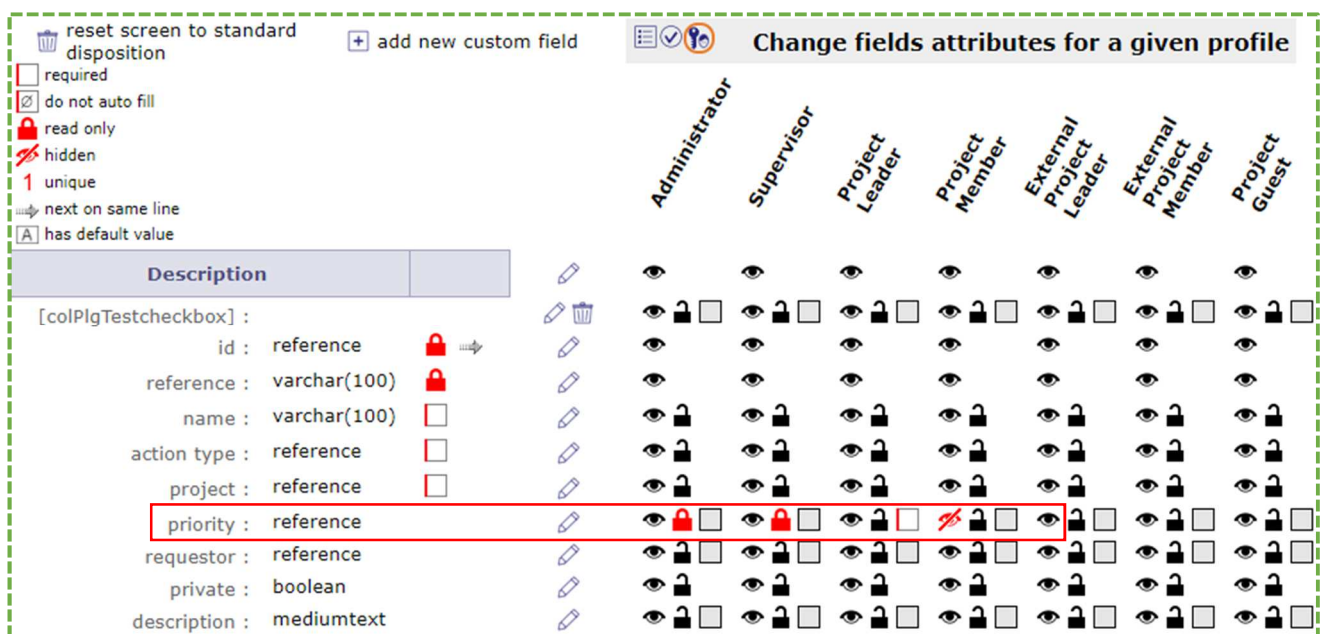
CHANGE FIELD ATTRIBUTES FOR GIVEN PROFILE

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:

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.
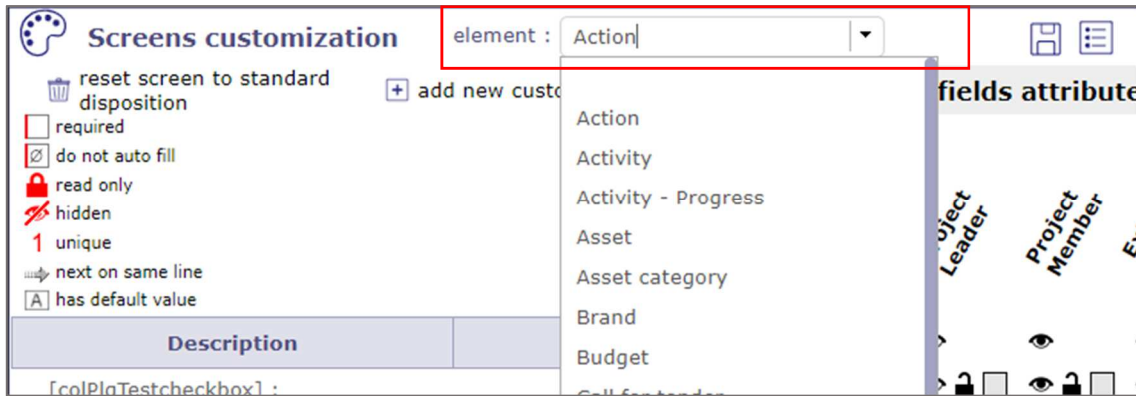
EDIT EXISTING FIELD

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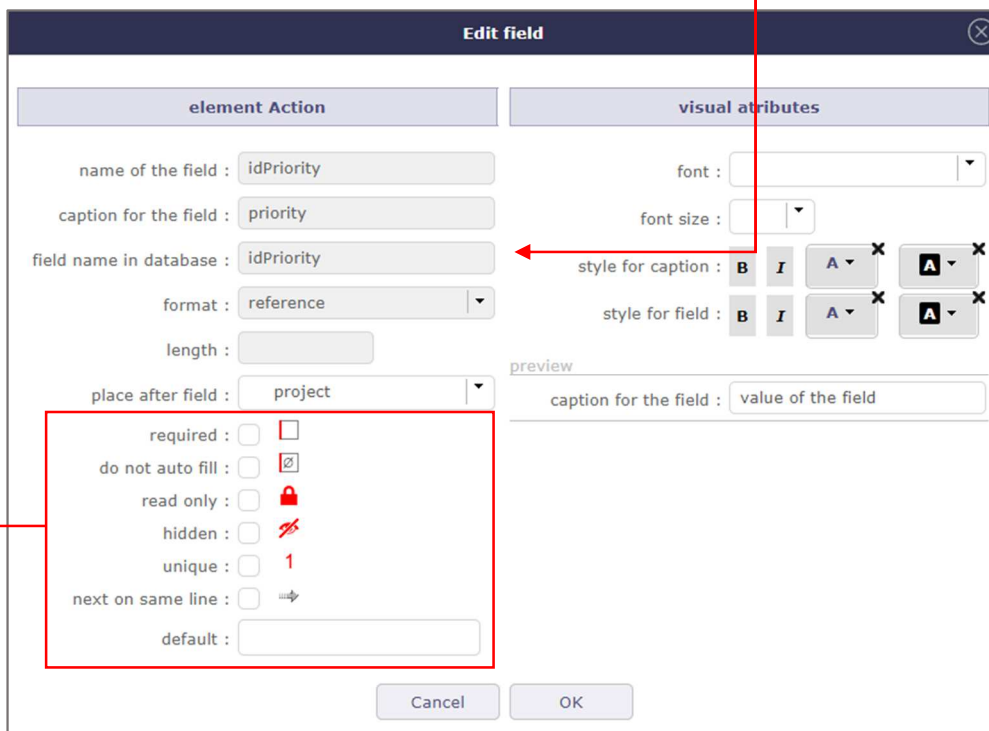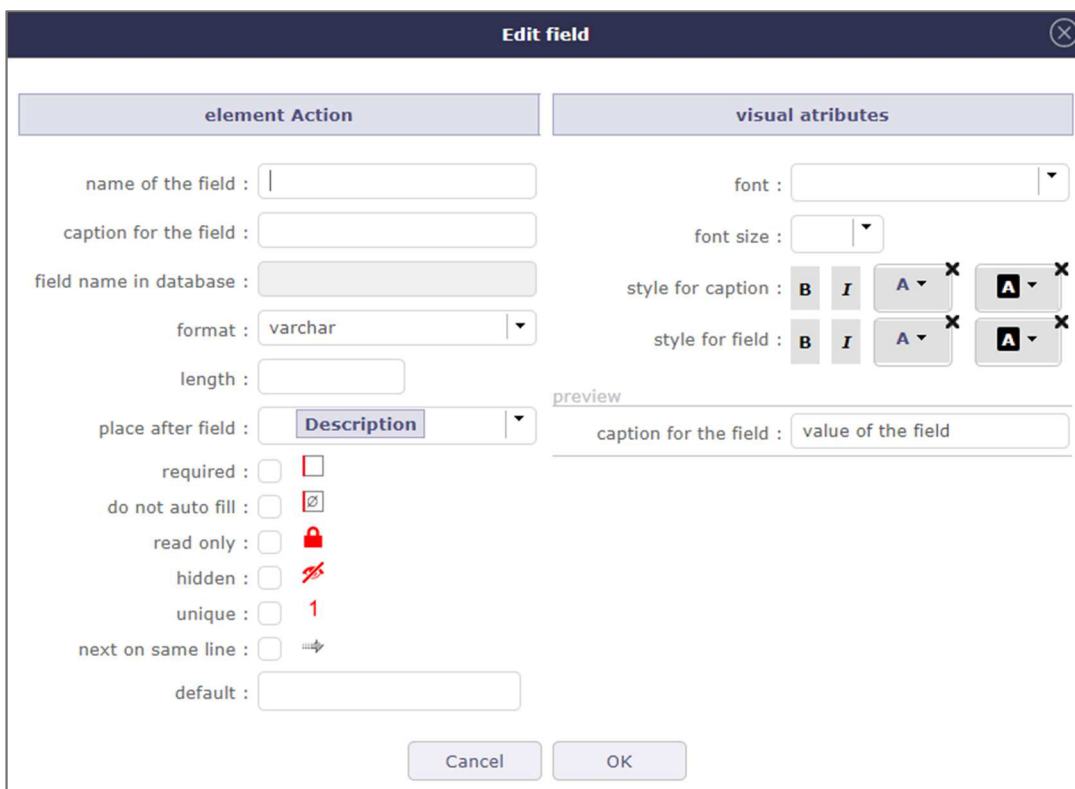
You can then check on of the corresponding attribute to apply it:

CREATE FIELD

Click on edit button [+] to add a new field.
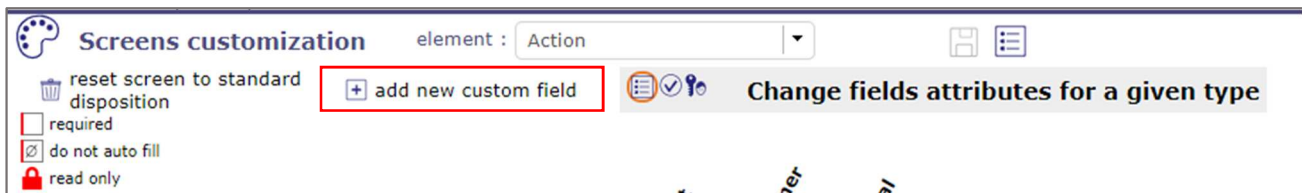
This will open change pop-up.

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

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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

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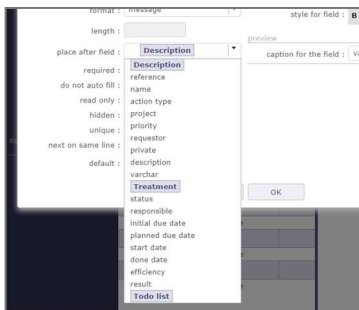
Place after field: to move the field after the corresponding field

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 en change values for visual attributes on right part of edit pop-up.

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.

DELATION

DELETE CUSTOM FIELD

Click on delete button 🗑 that appears beside your custom field.

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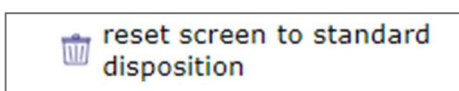
This will revert all changes made to the screen to retreive the standard version of the screen.

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.
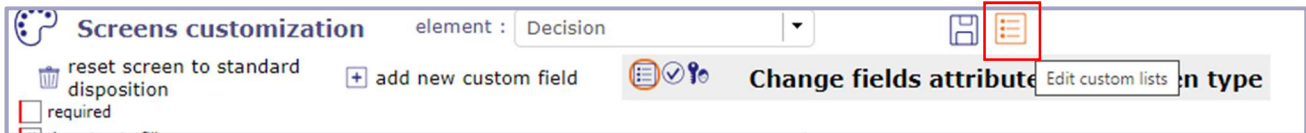
DEFINE NEW LIST FOR SELECT FIELD

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.

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.

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Example: MyList.

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

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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.

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

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 ProjeQtOr 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 ProjeQtOr 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	V5.3	
Avoid some reserved word on name for fields		
Possibility to create field "color		
Error when hiding "Restrict Type" Section		

Add a "Unique" attribute that verifies the uniqueness of the value		
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	V6.0	V9.2.4
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		