PM4 + Partners Knowledge Articles

Customizing your PM4+ user experience for Consultants and Design Team

Content

Customizing your Workspace

Your workspace in PM4+ is predefined with activities and information lists that you and your company need to work efficiently in the PM4+ Partnership workspace. However, you can customize your workspace further by adding tiles, lists and links to information you frequently access.

In this section, you will learn how to add and maintain:

- Information tiles (with or without a count) for a customized view of a list
- New custom views of log lists to your tabbed list group
- Links to lists

Customizing your environment starts with creating a custom view of a log list. Please review the article on "Sorting and Filtering Lists" before you proceed.

Note: some capabilities may change with Microsoft platform updates. This document is current for product version: Microsoft Dynamics 365 for Finance and Operations (8.1) - Installed platform version: Update23 (7.0.5126.35370)

Customizing Tiles

## Creating an information tile

You can create tiles in your workspace to display different views of lists. You can also set an option for the tile to show the number of records currently in the list the tile represents. When the tile shows the record count, you can see quickly if and how many records are in the list. If you connect this feature to an activity, you know if you need to take an action.

The image below shows the actions for creating and updating information tiles:
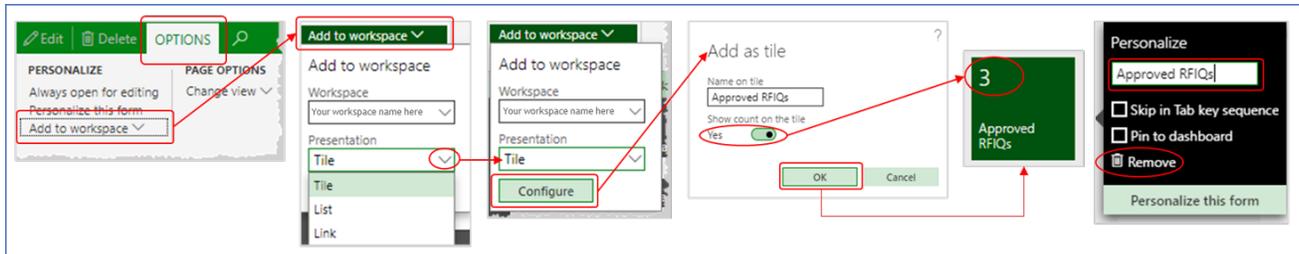
1. Create a custom view of a list as described in the steps in the topic "Filtering and Sorting lists".

2. In the action pane, select OPTIONS to open the Options tab.

3. In the PERSONALIZE group, open the Add to workspace drop-down menu.

4. From the Workspace drop-down menu, select the name of your workspace.

5. From the Presentation drop-down list, select Tile

6. Click Configure
   The **Add as tile** dialog opens.

7. Complete the **Name on tile** text box with the desired name.

8. To show the number of records in your list on the tile, set the **Show count on the tile** toggle to **Yes**

9. Click **OK**

10. Return to your workspace to confirm the tile was created.

11. Select the tile to test and confirm the record count.

Removing a tile or modifying a tile name
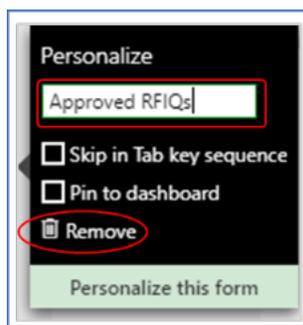
You can modify the name of any tile that you find in your workspace; however, you can only remove a tile that you have created.

1. Right-click the tile you want to remove or modify.

2. Select **Personalize** [.....*name of tile*....]
    The **Personalize** menu opens.

3. To change the name of a tile, update the text in the **Name** text box.

4. To remove the tile, click the **Remove** action link.

5. Click outside the menu area to close the menu.

Customizing Lists

Create a list

Lists appear as tabbed lists in your workspace.

1. Create a custom view of a list as described in the steps in the topic "Filtering and Sorting lists".

2. In the action pane, select **OPTIONS** to open the **Options** tab.

3. In the **PERSONALIZE** group, open the **Add to workspace** drop-down menu.

4. From the **Workspace** drop-down list, select your workspace name.

5. From the **Presentation** drop-down list, choose **List** from the list.

6. Click **Configure**
    The **Add as list** dialog opens.

7. Complete the **Name for tab** text box.

8. From the **List style** drop-down list, choose the number of columns to display in the list
    ("3" or "8").

9. In the **Columns** list, choose a field by selecting the checkbox so a check mark appears beside the **Field** name.

    Note: The fields that are most likely to be useful to add to the list appear at the top of the list of selections. For example, the global address book is the first table in a job contact list. Make your field selections in this section first.

10. Once you are satisfied with your selections, click **OK**

    Note: PM4+ displays an error message if you select too many fields. You cannot proceed until you remove the extra selections. To do this, review the list and de-select a field to remove it from the list. The checkbox beside the field name is cleared.

11. Return to your workspace to confirm the list was created and added to the bottom of tabbed lists.

12. Select the tab to review the records displayed.

    If you want to adjust the layout, see the subtopic "Changing a list you created" below.

Change a list you created

You can change the name of any list in your workspace; however, you can only delete a list that you created. As well, you can change column spacing, hide fields, and change the order for how a list appears in the tabbed list.

The image below shows the process for changing a list your created:
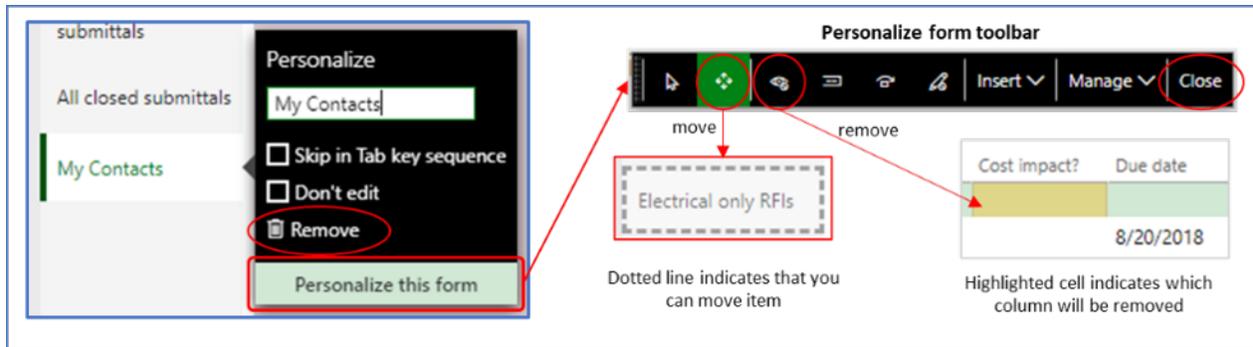
Rename or remove a list

1. Right-click the list you want to remove or modify.

2. Select **Personalize** '[.....*name of list*....]'
   The **Personalize** menu opens.

3. To change the name of a list, update the text in the **Name** text box.

4. To remove the list, click the **Remove** action link.

5. Click outside the menu area to close the menu.
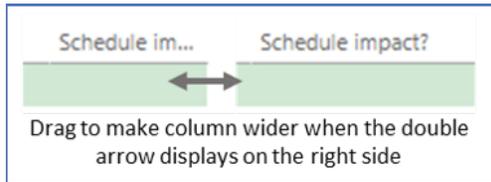
6. Refresh the view (**F5**).

Reorder a list item in the tabbed list group

1. Find the tabbed list you want to move and right-click on the name.

2. From the menu, select **Personalize** [.....*name of list item.*...]
   The **Personalize** menu opens.

3. Select Personalize this form

4. The **Personalize form** tool bar opens.

5. Select the **Move** button in the tool bar ( ).

6. Select the tab of the list you want to move until a dotted line appears around the name.

7. Click and hold the mouse pointer in the dotted line box around the name, and drag the item until it appears in the correct order in the list.

8. Release the mouse.

9. Click **Close** to close the toolbar.

10. Refresh the view (**F5**).

Adjusting the column size on a list

Drag to make column wider when the double arrow displays on the right side

1.   Find the column whose size you would like to adjust.

2.   Move the mouse to the column border until the pointer changes to a double-headed arrow (⟸⟹).

3.   Click and hold the mouse button and drag the mouse to make the column wider or narrower.

4.   Release the mouse button when the column is the desired size.

5.   Repeat the above steps until you are satisfied with the sizes of all the columns.

6.   Refresh the view (**F5**).

Move a column

1.   Find the tabbed list you want to adjust and right-click on the name.

2.   From the menu, select **Personalize** [.....*name of list item*....]

3.   The **Personalize** menu opens.

4.   Select Personalize this form

5.   The **Personalize form** tool bar opens.

6.   Select the **Move** button in the tool bar (⬕).

7.   In the list, select the column name you want to move until a dotted line appears around the name.

8.   Click and hold the mouse pointer in the dotted line box around the name, and drag the item until it appears in the correct column order.

     Note: A dark line appears to the left of each column when you drag the column being moved past that column's border. This action indicates the current position of the column you are dragging.

9.   When the column is in the correct position, release the mouse.

10. Repeat the above steps until your columns in the correct order.

11. Click **Close** to close the toolbar.

12. Refresh the view (**F5**).

Remove a column

1.   Right-click the list you want to modify.

2.   Select **Personalize** [.....*name of list*....]

3.   The **Personalize** menu opens.

4.   Select Personalize this form

5.   The Personal form toolbar opens.

6.   To remove a column, select the column to remove and click the **Remove** action link.

7.   Click outside the menu area to close the menu.

8.   Refresh the view (**F5**).