

Planning board

 Language: [Deutsch](#) · [English](#)

Planning board

Graphical resource planning on a timeline – resource/booking BO, wizard, relative date expressions and Groovy formatting.

HOW-TO

APPLICATION DEVELOPER

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APPLIES TO NUCLOS 4.2026.X

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What is a planning board?

The **planning board** (also called *resource planning*; menu *Configuration Planning board*) is a graphical interface for **capacity and deployment planning** of arbitrary resources on a timeline – people, machines, vehicles, rooms, workstations or production lines.

It supports day-to-day operational planning and makes **utilization and bottlenecks visible at a glance**: who or what is booked when, where is capacity still free, where do appointments overlap? The planning board thus replaces manually maintained planning tables and calendars with an always up-to-date, interactive view directly on your business data.

Basic principle

The planning board relates two kinds of business content:

- **Resources** – what is being planned (e.g. employee, machine, vehicle). They form the **rows** of the board.
- **Bookings** – the concrete allocation of a resource over a period (e.g. holiday, maintenance, project assignment, production order). They appear as **coloured bars** on the time axis.

In addition, **milestones** (points in time), **relationships** between bookings (succession/dependencies, GANTT) and **background events** (e.g. public holidays) can be displayed. Different booking types can be kept on the same resource – e.g. holiday, sickness and project times of an employee – each visually distinguishable.

Freely configurable

- display of resources, bookings and legend,
- time window and granularity (hours/days/weeks),
- highlighting of periods (weekends, holidays) and bookings (colours),
- context functions, milestones and GANTT view,
- permissions.

Use by end users

- move and extend bookings via **drag & drop**, rebook between resources by dragging into another row,
- create, copy and delete directly on the board, edit via double-click through the detail form,
- bulk-edit several bookings at once,
- convenience: choose period and time unit, switch axes (resources/time), filter resources and bookings, restrict to "only my entries" on shared boards, export/print the view,
- the personal display is kept per user; the board can refresh automatically at configurable intervals.



Automation

With [rules](#) bookings can be generated automatically (e.g. production orders from customer orders) or checked and notified on create/change/move/delete.

Configuration (example: utilization plan)

1. Resource and booking BO

Create a **resource BO** (e.g. employee) and a **booking BO** with a reference to the resource plus *date from/to* (optionally *time from/to*).

Mitarbeiter

Projekt

Projekt Auswahl

Verkaufschance Auswahl

Datum von

Datum bis

»41727691«

40001 div. Konstruktionsarbeiten / AU 2944

03.07.2023

07.07.2023

Booking BO for planning.

2. Wizard: name, label, BOs

The wizard guides you through internal name, label/menu path and selecting the resource BO (with sort field) and booking BO (with relationship).

Wizard Plantafel

Overview

1. Komponente erstellen

2. Beschriftung

3. Ressourcen-Businessobjekt

4. Planelemente

5. Erweiterte Einstellungen

6. Fertig

Ressourcen-Businessobjekt

Ressourcen-Businessobjekt konfigurieren

Businessobjekt für Ressource

Mitarbeiter

Sortierfeld

oberbegriff

Standard Zeitraum von (HEUTE)

.m[

) z.B. "-1m.m[+14t" für den 15. des vorherigen Monats

Standard Zeitraum bis (HEUTE)

+6m.m]

) z.B. ".j]" für den 31.12. des aktuellen Jahres

Zeitraum von, abhängig von Attribut

Zeitraum bis, abhängig von Attribut

(t=Tag, w=Woche, m=Monat, j=jahr Funktionen: "+"=addieren, "-"=subtrahieren, "="=Anfang/Ende setzen, mit "t" bzw. "j")

☒ Wochentage anzeigen

☐ Feiertage anzeigen

Businessobjekt für Feiertage

Datum des Feiertags

Name des Feiertags

Bemerkung (optional)

Sprache	Beschriftung Ressource	Tooltip Ressource	Beschriftung Legende	Tooltip Legende
British English	\$(oberbegriff)		Mitarbeiter	
Deutsch	\$(oberbegriff)		Mitarbeiter	

Relative date expressions for the period

The default period is calculated relative to **TODAY** (evaluated left to right):

Character	Meaning
+ / -	add / subtract
. [or .]	jump to start [or end]
t / d	day
w	week
m	month
j / y	year

Period	From	To
current month	.m[	.m]
current year	.j[	.j]
until end of next month	.m[	+1m.m]
until 15th of next month	.m[	+1m.m[+14t

In the table below you define the display and legend; field content via variables, e.g. resource \${strnachname} \${strvorname}, booking \${grunderderbuchung}.

4. Plan elements & successor relations

Here you configure the displayed entries. **Successor relations** (e.g. critical path) are based on a BO with two reference fields to the booking BO and are drawn as a connection. Optional: staged view, milestones.

Script code (Groovy) for formatting

In the advanced settings two methods can be provided:

- `formatCell(clct, cell)` – formats cells (resource/booking): `cell.color`, `cell.text`, `cell.toolTip`.
- `formatBg(clct, interval, bg)` – formats the background: `bg.color` (`interval.start/interval.end` are Date).

```
def formatCell(clct, cell) {
    if (clct['meinFeld'] == 5) {
        cell.color = "#ff9999";
        cell.toolTip = "Text";
    }
}

def formatBg(clct, interval, bg) {
    if (interval.start <= new Date()) {
        bg.color = "#ffccff"
    }
}

ODER
import java.text.SimpleDateFormat
def formatCell(clct, cell) {
    Date currentDate = new Date();
    def formatter = new SimpleDateFormat("dd/MM/yyyy");
    String formattedDate = formatter.format(currentDate);
    if (clct['halbertag'] == true) {
        cell.color = "#ee8625";
        cell.text = clct['intmitarbeiter']+" (" +clct['von'] + " halber Tag " +clct['uhrzeit']+" )";
    }else{
        cell.color = "#398db7";
        cell.text = clct['intmitarbeiter'] + " (" +formattedDate+" - " +clct['bis']+" )";
    }
}
```



Notes

Attributes are accessed via `clet['field']`, colours as `Color` or hex string `"#rrggbb"`. The methods must be **entered manually** in the settings under *rule for formatting resource/booking* (no dropdown). Missing properties only surface at runtime.

Related pages



Embedding a planning board in a layout

Into the layout.

[Open](#)



Rule sets

Automation.

[Open](#)