

Organize (PA)

This page describes project navigation and explains how to add, move, rename, duplicate, edit, and delete items in navigation.

Project navigation is the hierarchy of information in a project. The hierarchy is displayed as a Project Tree, and items in the hierarchy are called *nodes*. To add nodes to the Project Tree, you use the *Navigation Builder*.

The following image shows the Project Tree and Navigation Builder.



Important Concepts

These are some important concepts about creating navigation.

Node Types

A project's navigation can contain the following kinds of nodes:

- **Location nodes**—For example, these nodes can represent campuses, buildings, or floors.
- **Device nodes**—For example, these nodes can represent VAV units or AHUs.
- **Reports module**—This node is used to generate reports.
- **Alarms module**—This node is used to view alarms.
- **Schedules module**—This node is used to view and edit events.
- **Page Include modules**—These nodes allow you to include a DGLux5 page or external web page in your project.

Device Templates and Relativization

Device nodes are different from all other node types, in that each device node must be assigned to a *device template*. A device template is a data-driven graphic that you design once and reuse for multiple devices.

When you create a new template, you must set a master device for the template. This step is necessary because device templates make use of a concept known as *relativization*. Relativization converts a data metric's absolute path to a relative path and then makes changes to the non-relative part of the path. This process allows the same data metrics, such as damper position and temperature, to be used for different devices in different instances of a template.

Only the master device's metrics are available to the relativization process. For any non-master device, only metrics that match the master device's metrics can be used. Therefore, when you set a master device for a template, you might want to choose the device that has the most metrics. See also: [Bindings](#)

How to Open the Navigation Builder

The following interactions open the Navigation Builder:

- Click **Organize** on the home page, as shown in the following image.



- Choose the **Manage Navigation** tab at the top of the screen, as shown in the following image.



How to Manage Nodes

This section shows you how to add, rename, move, duplicate, edit, and delete nodes. It also contains a reference for node properties.

How to Add a Location Node or Module Node

A location node represents location content in your project. A module node represents other content such as reports, alarms, schedules, and external content.

To add a location or module node to your project:


- In the Navigation Builder, choose the  **Navigation** tab or the  **Module** tab, and drag a location node or a module node into the Project Tree, as shown in the following image.



The node is added to the Project Tree.

How to Create a Device Template and Add Device Nodes

To create a new device template and also add some device nodes associated with it:

1. In the Navigation Builder, choose the  **Template** tab, and drag the **New Template** node onto the Project Tree, as shown in the following image.



A Template Node dialog appears.


2. Specify a name for the new template, as shown in the following image.



3. Optionally, add an icon for the new template. See [Navigation Node Properties](#).

4. Under **Device Selection**, select some devices that will use this template, as shown in the following image.



5. To specify a master device, click the  key icon next to that device.



Note


Next to each device, a green or red bar shows the number of metrics that match the master device, followed by the total number of metrics.

6. Click **Add**.

The device nodes appear in the Project Tree, and the new template appears in the Navigation Builder.

How to Add Device Nodes Using an Existing Template

To add device nodes using an existing device template:

1. In the Navigation Builder, choose the  **Template** tab.
2. Drag the template's node from the Navigation Builder to the Project Tree.

A Template Node dialog appears.

3. Specify the device or devices that you want to add.
4. Click **Add**.

The device nodes appear in the Project Tree.

How to Rename a Node

You can rename a node in two ways.

How to Rename a Node via the Project Tree

To rename a node via the Project Tree:

1. Double-click the node name.
2. Type a new name, and press Enter or Return.

How to Rename a Node via the Node Editor

To rename a node via the Node Editor:

1. To open the Node Editor, right-click the node and choose  **Edit**.
2. Enter the new name, and click **Apply**.

How to Move a Node

You can move a node in two ways.

How to Move a Node via Drag and Drop

You can move nodes and change their hierarchy levels via drag and drop. To control node hierarchy levels, you use a blue line indicator that appears when you begin dragging a node. If the blue line is vertically centered on the target node, the dragged node becomes a child of the target node. If the blue line is aligned above or below the target node, the dropped node becomes a sibling of the target node.

The following image shows an example of adding a location node that will be a child of the target node.



The following image shows an example of adding a location node that will be a sibling of the target node.



To move a node via drag and drop:

1. Begin dragging the node.
2. Watch the blue line indicator, and drop the node when the blue line is aligned where you want it.

How to Move a Node Up and Down

The following interactions move a node up or down without changing its hierarchy level:

- Right-click the node, and choose **Up** or **Down**.
- Select the node, click the **Menu** icon, and choose **Up** or **Down**.

How to Sort Nodes

When one or more nodes are selected, the following interactions sort the nodes alphabetically:

- Right-click a selected node, and choose **Sort Ascending** or **Sort Descending**.
- Click the **Menu** icon, and choose **Sort Ascending** or **Sort Descending**.

How to Duplicate Nodes

When one or more nodes are selected, the following interactions duplicate the selected nodes:

- Right-click one of the selected nodes, and choose **Duplicate**.
- Click the **Menu** icon, and choose **Duplicate**.

How to Edit Nodes

To edit one or more nodes:

1. In the Navigation Builder, select the node or nodes that you want to edit.
2. To open the Node Editor pop-up, right-click a selected node and choose **Edit**.
3. Use the Node Editor to edit properties. See [Navigation Node Properties](#).
4. Click **Apply**.

Your changes are saved.








Tip

To cancel your changes without saving, click **Close**.

How to Delete Nodes

When one or more nodes are selected, the following interactions delete the selected nodes:

- Right-click one of the selected nodes, and select  **Delete**.
- Click the  **Menu** icon, and choose  **Delete**.

Navigation Node Properties

The following navigation node properties can be edited.

Property	Purpose
Name	Sets the name of this node. Affects the Project Tree and project navigation.
Icon	Sets the icon of this node. Affects the Project Tree and project navigation. Overrides the icon for this node's template, if applicable. To set an image, drag the image file from your computer to the area specified, or click the specified area and browse to the file.
As Popup	Sets whether this content opens as a page or a pop-up window. Pop-up windows open in floating or tabbed panels in front of the currently open page. Pages replace the previously open page.
Geo Lat	Sets the latitude of a location. This property is related to a feature that is not implemented in Project Assist 2.0, version 10.
Geo Lon	Sets the longitude of a location. This property is related to a feature that is not implemented in Project Assist 2.0, version 10.
Template (Devices only)	Sets which template this device is assigned to.
Path (Devices only)	Specifies the path to this device.
Include Type (Page Include modules only)	Sets whether this node opens a DG5 file or an external URL.
Include Path (Page Include modules only)	Sets the DG5 path or external URL that this node opens.

How to Manage Device Templates



This section shows you how to preview, duplicate, edit, and delete device templates. It also contains a reference for device template properties.

See also: [How to Create a Device Template and Add Device Nodes](#).

How to Preview a Device Template

If you have started designing a device template graphic, you can use the Navigation Builder to preview the device template with the master device's data.

To preview a device template:

1. In the Navigation Builder, choose the  **Template** tab.
2. Hover over the device template, and click the  **Settings** icon, as shown in the following image.




3. Choose  **Preview**.


How to Duplicate a Device Template

When you duplicate a device template node in the Navigation Builder, you also duplicate the graphical device template associated with that node.

To duplicate a device template:

1. In the Navigation Builder, choose the  **Template** tab.
2. Hover over the device template, and click the  **Settings** icon, as shown in the following image.





3. Choose  **Duplicate**.
4. Specify the path for the master device of the new template, if the path is different.

How to Edit a Device Template

In the Navigation builder, you can edit a device template's name, icon, or master device path. See [Device Template Properties](#).

To edit a device template:

1. In the Navigation Builder, choose the  **Template** tab.
2. Hover over the device template, and click the  **Settings** icon, as shown in the following image.



3. Choose  **Edit**.
4. Edit the device template properties. See [Device Template Properties](#).

How to Delete a Device Template

You can delete a device template from the Navigation Builder.

To delete a device template:

1. In the Navigation Builder, choose the  **Template** tab.
2. Hover over the device template, and click the  **Settings** icon, as shown in the following image.



3. Choose  **Delete**.

Device Template Properties

The following device template properties can be edited.

Property	Purpose
Name	Sets the name of this template. If you change the name, the devices that already use this template are updated.
Icon	Sets the icon that represents the template. If you change the icon, the devices that already use this template are not updated. Affects devices the Project Tree and project navigation. Overridden by the device icon, if applicable. To set an image, drag the image file from your computer to the area specified, or click the specified area and browse to the file.
Path	Sets the path to the master device for this template.

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