



# Saved Time with Saved Layouts

**How-to & best practices**

Caroline Gadonas, Youssef Mhimra, & Erol Ogunc

# Your Presenters



**Caroline Gadonas**  
Senior Enterprise Customer  
Success Manager



**Youssef Mhimra**  
Application Support  
Engineer, Prism



**Erol Ogunc**  
Team Lead, Prism  
Application Support

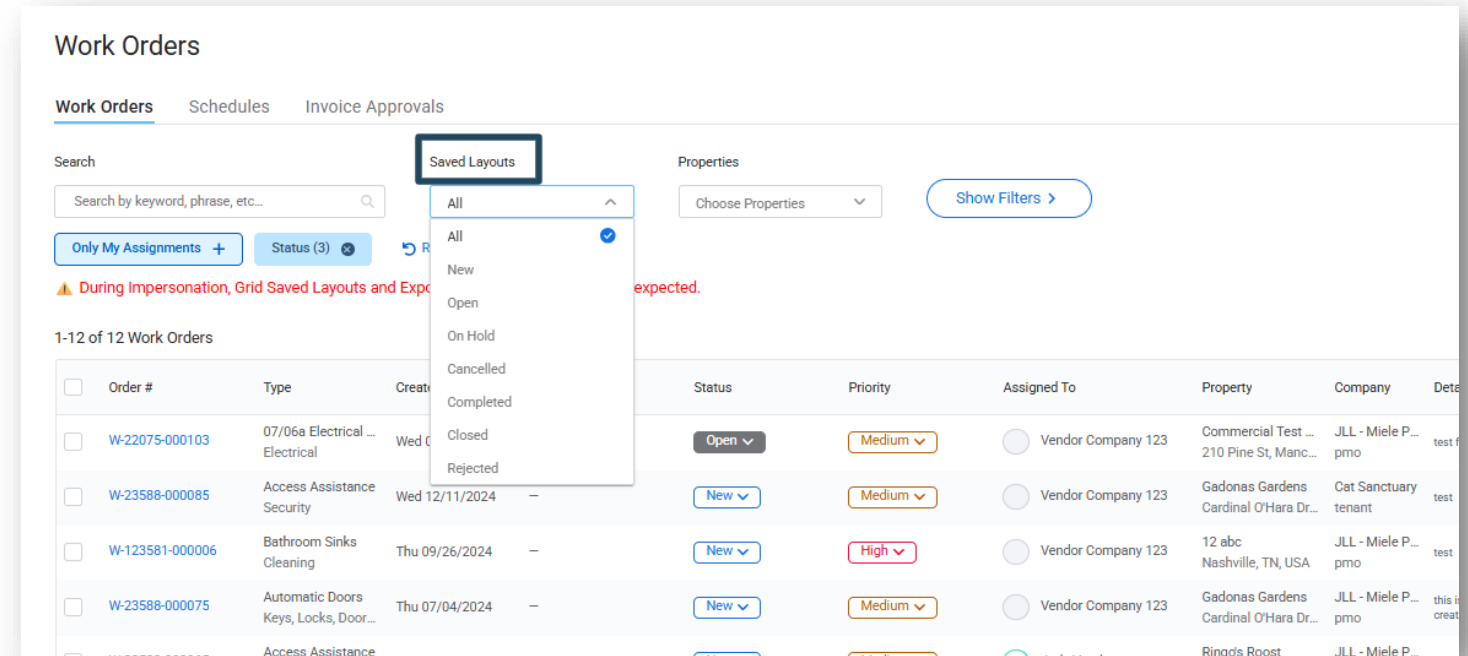
# Agenda

- What are saved layouts?
- Why would I want to use saved layouts?
- How can I create, update, or delete saved layouts?
- FAQs
- Q&A

**Saved Layouts:** What are they,  
and why would I want to use  
them?

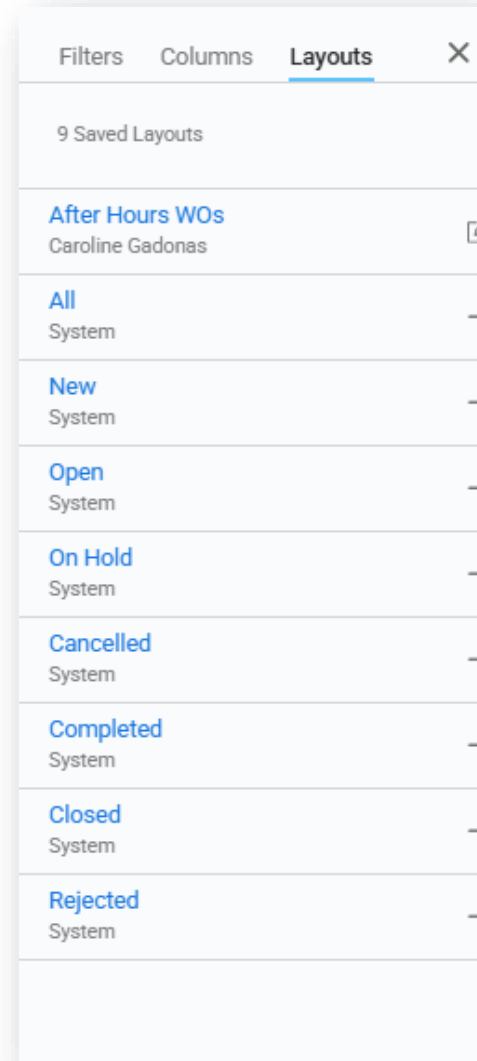
# What are **saved layouts**?

- **Saved layouts** are a tool available in most Prism modules, including, but not limited to:
  - Work Orders
  - Inspections
  - My Properties
  - Equipment
- Some modules have **system** saved layouts (pre-loaded into Prism)
- Otherwise, users can **create their own** saved layouts



# Why would I want to use **saved layouts**?

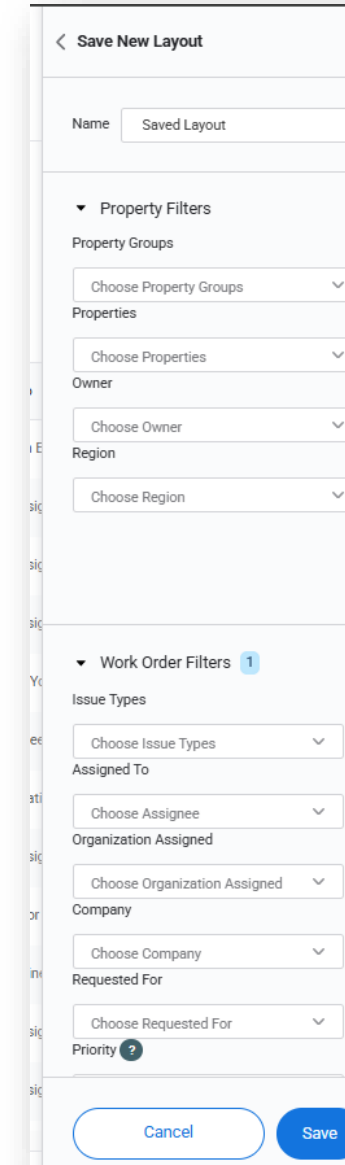
- Remove the need to manually configure multiple filters
- Easily switch between different datasets with a single click
- Ensure key columns are always visible
- Simplify workflows for you & your team



# How to Create Saved Layouts

# How to Create Saved Layouts

1. Click **Show Filters**
2. To filter the data displayed (ex: specific statuses, issue types, etc), select the specific **Filters**
3. Select the Columns tab:
  1. Check the boxes for the columns you want to display.
  2. Uncheck the boxes for columns you want to hide.
  3. You can rearrange your columns in the Work Order search grid.
4. Click **Save Layout** at the bottom of the Filters tab
5. Enter a **Name** for your Saved Layout and click **Save**.



The screenshot shows a 'Save New Layout' dialog box with the following fields and sections:

- Name:** A text input field containing 'Saved Layout'.
- Property Filters:**
  - Property Groups:** A dropdown menu with 'Choose Property Groups'.
  - Properties:** A dropdown menu with 'Choose Properties'.
  - Owner:** A dropdown menu with 'Choose Owner'.
  - Region:** A dropdown menu with 'Choose Region'.
- Work Order Filters 1:**
  - Issue Types:** A dropdown menu with 'Choose Issue Types'.
  - Assigned To:** A dropdown menu with 'Choose Assignee'.
  - Organization Assigned:** A dropdown menu with 'Choose Organization Assigned'.
  - Company:** A dropdown menu with 'Choose Company'.
  - Requested For:** A dropdown menu with 'Choose Requested For'.
  - Priority:** A dropdown menu with a question mark icon.

At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.



# How to Edit or Delete Saved Layouts

## To Edit:

1. Select the layout you'd like to edit in **Saved Layouts**
2. Click **Show Filters** and adjust the **Filters** or **Columns** as needed.
3. Click **Layouts**, then select the current layout.
4. Make any additional changes (ex: name, additional filters) you may need.
5. Click **Save**.

## To Delete:

1. Click **Layouts**.
2. Scroll to the bottom of the list and select **Remove**.

The screenshot shows the 'Edit Layout' dialog box with the following fields and options:

- Name:** After Hours WOs
- Property Filters:**
  - Property Groups:** Choose Property Groups
  - Properties:** Choose Properties
  - Owner:** Choose Owner
  - Region:** Choose Region
- Date Range:** MM/DD/YYYY to MM/DD/YYYY
- Related Work Type:** Choose related work type
- Project:** Choose Project
- Batched:** Is Batched
- Vendor Estimation Request:** Choose...
- Suspended Assignee:** Choose...

At the bottom, there are three buttons: **Remove** (with a trash icon), **Cancel**, and **Save**.

# Ideas for Saved Layouts

# Ideas for Saved Layouts

## Work Orders

- Identify work orders missing billable charges
  - Status = Completed, Closed
  - Charges = No
  - Expected Billing = Yes
- Manage vendor estimates
  - Status = New, Open, On Hold
  - Vendor Estimation Request = Yes
- Identify work assigned to suspended companies
  - Status = New, Open, On Hold
  - Suspended Assignee = Yes

# Ideas for Saved Layouts

## Equipment

- Identify equipment that may need to be replaced soon
  - Has Life Expectancy = Yes
  - Remaining Life = 0-1 Years

## Insurance

- Identify certificates with upcoming expiration
  - Upcoming Expiration = Next 30 Days, Next 60 Days

# FAQs

# FAQs

## **Are saved layouts I create visible to other users?**

- Layouts are stored for users' personal use and does not appear for other users by default.
- Users can create and manage their own saved layouts independently, allowing for personalized data views without affecting others' configurations.

## **How many saved layouts can I create?**

- Users can create an unlimited number of saved layouts in Prism!

## **Are saved layouts accessible on mobile?**

- Saved layouts are available on desktop only.
- However, users can still apply several filters while on the mobile app.

# Resources

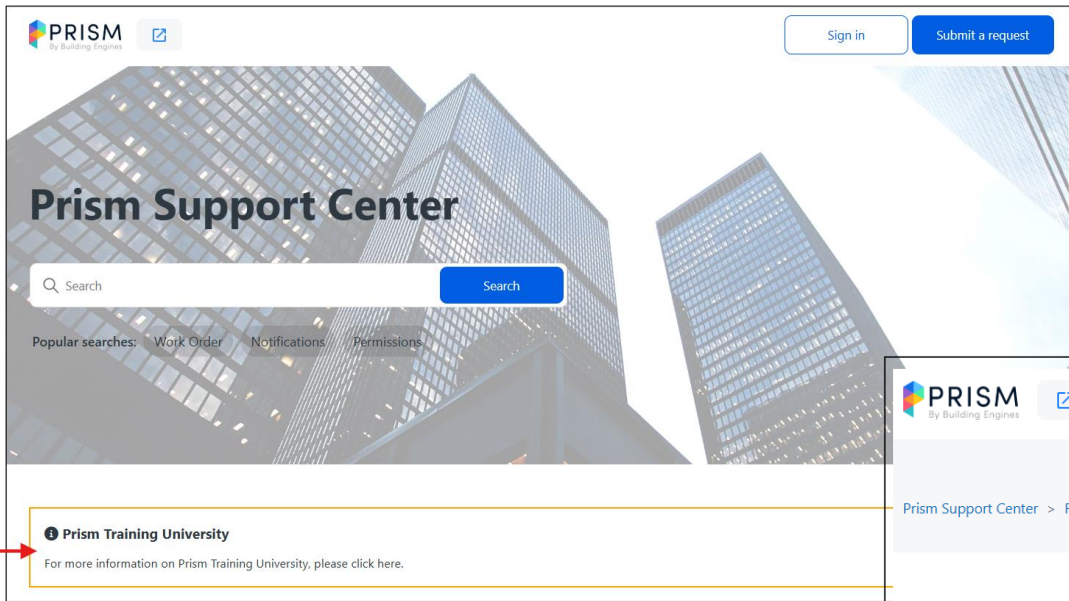
# Prism Support Center

- For additional materials and support, please visit the Prism Support Center which can be found on the bottom left-hand side of [Prism](#)

The screenshot displays the Prism Support Center interface. On the left, a navigation menu lists various features: Building Engines, Create Work Order, Admin, Reporting, My Files, My Properties, My Spaces, My Users, My Equipment, My Companies, Accounting, RealAccess, and Support. The 'Support' link at the bottom is highlighted with a red box, and a red arrow points to it from the left. The main dashboard area shows a welcome message 'Welcome, Erol' and a 'Hide Filters' button. Below this, there are filters for 'Property Groups' and 'Properties'. The dashboard is divided into several sections: 'Unassigned Work Orders' (999+), 'Work Orders On-Hold' (1), 'My Work Orders' (0), 'Upcoming' (0), 'Unacknowledged Work Orders' (0), and 'Urgent and High Priority SLA' (3). Each section contains a list of work orders with details such as 'Access Assistance', 'Grace Kim', '33 Arch Street - Meters', and 'Created: 2/19/2025 7:45 ...'. The 'Urgent and High Priority SLA' section shows a work order for 'Cleaning - After Hours' by 'Erol Ogunc' with a status of 'Urgent'.

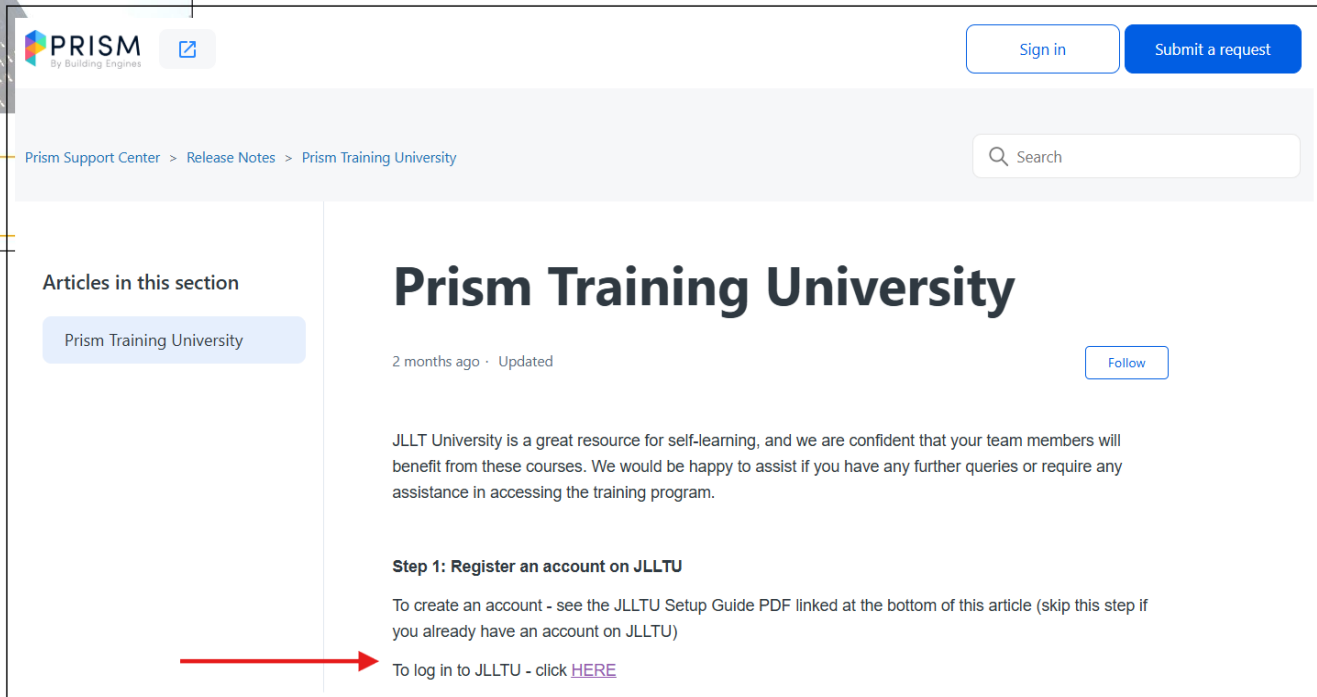


# Prism Training University



**Step 1:** Start at the Prism Support Center and select Prism Training University at the top of the page

**Step 2:** Then, select the link “click HERE” to navigate to Prism Training University



# Q&A

# Disclaimer

The information contained in this document is proprietary to Jones Lang LaSalle and shall be used solely for the purposes of evaluating this proposal. All such documentation and information remains the property of Jones Lang LaSalle and shall be kept confidential. Reproduction of any part of this document is authorized only to the extent necessary for its evaluation. It is not to be shown to any third party without the prior written authorization of Jones Lang LaSalle. All information contained herein is from sources deemed reliable; however, no representation or warranty is made as to the accuracy thereof.

