

Power users

Planon Software Suite Version: L100



© 1997 - 2023 Planon. All rights reserved.

Planon and the Planon logo are registered trademarks of Planon Software Development B.V. or its affiliates. All other product and company names mentioned herein are trademarks or registered trademarks of their respective companies. Planon Software Development B.V., its affiliates and/or licensors own the copyright to all Planon software and its associated data files and user manuals.

Although every effort has been made to ensure this document and the Planon software are accurate, complete and up to date at the time of writing, Planon Software Development B.V. does not accept liability for the consequences of any misinterpretations, errors or omissions.

A customer is authorized to use the Planon software and its associated data files and user manuals within the terms and conditions of the license agreement between customer and the respective legal Planon entity as soon as the respective Planon entity has received due payment for the software license.

Planon Software Development B.V. strictly prohibits the copying of its software, data files, user manuals and training material. However, customers are authorized to make a back-up copy of the original CD-ROMs supplied, which can then be used in the event of data loss or corruption.

No part of this document may be reproduced in any form for any purpose (including photocopying, copying onto microfilm, or storing in any medium by electronic means) without the prior written permission of Planon Software Development B.V. No copies of this document may be published, distributed, or made available to third parties, whether by paper, electronic or other means without Planon Software Development B.V.'s prior written permission.

About this Document

Intended Audience

This document is intended for Planon Software Suite users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols

Q	Text preceded by this symbol contains additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.
_	Text preceded by this symbol refers users to other parts of the user documentation for more information.

Table of Contents

Introduction9
Power users and user groups10
Concepts12
Reference date12
Archive
Reporting13
Modify within selection
Action on selection
Filters & Quick search
System Administrator
Home: Environment management21
Disk22
Logs
SSO
IP Whitelisting24
Accounts
User groups25
Users
Alerts settings
Alerts settings
Alerts
System info
Background actions
Log viewer
User sessions
System settings

Licenses
Scheduled tasks
Themes
Kiosk & panel license42
Kiosk & booking panel
Tools
Enterprise talk 44
Templates
Space & Reservation Manager46
Home46
Area per person by building (average)47
Net area per department47
Spaces by space standard (net area & count)47
Spaces by space type (net area & count)49
Bookings to be approved51
Planon Workplace Insights dashboards52
General
Deep dives54
Space & occupancy55
Spaces & workspaces55
Personnel
Mapping options
Sensor monitoring77
Sensor management
Profiles & targets
Moves
Moves
Move settings

CAD Integration
Drawing definition92
Add CAD business objects93
Add CAD business object mapping94
Import definitions96
Mapping between drawing & floor98
Run import98
Threshold values
CAD colors & hatchings100
Reservations
Bookings101
Booking analytics
Desk booking stats103
Desk utilization
Room booking stats
Room utilization107
Space data (space)
Calendars
Cities108
Property pick lists
Space pick lists
Workspace types
Base data (reservations)
Desk setup types110
Facilities110
Non-bookable periods
Reservation pick lists
Room layout

CAD import definitions
Sensor Integration
Sensor Management140
AppCenter147
Inbound (Raw) Messages147
Immeasurable148
Base data149
Properties & floors149
Spaces & workspaces150
Space category & type161
Workspace type163
Department163
Cost centers164
Define calendars164
Data onboarding166
Profile & targets167
Themes
Users
Alerts settings
My alerts171
Index172

Introduction

Planon Workplace Edition (PWE) is a cloud-based, turn-key, subscription software that will empower CRE and workplace teams to efficiently manage all workplace functions to deliver great employee experience, promote community engagement and optimize space use, built on a central platform.

On a high level, this document describes the capabilities, features, user groups and 'how to', which is a basis for understanding what users (power users / end users) can expect.

To be able to have a full understanding of PWE as power user, this document gives more insights and background information on setting up and maintaining the available features.

Per user group, the possible features are described, and references are made to help understand relationships.

Building users are excluded from this document, because they do not maintain any data - they make efficient use of what the Power users maintain in the application.

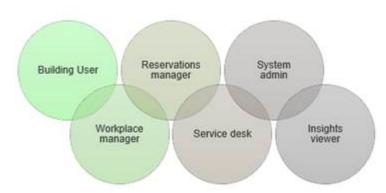
The following Power user personas will be described:

- System administrator (ITadmin)
- Space & reservation manager (Workplacemgr)
- Service desk (Servicedesk)
- Building administrator (Buildingadmin)

Power users and user groups

Planon Workplace Edition features a predefined set of user groups. Users can be associated with these user groups, and a user can be linked to multiple user groups, thereby expanding the range of functionalities available to the user. The following graphical overview depicts the user group setup:

Workplace Edition User Groups



Authorization Use-cases



In the given example, Margot is linked to two user groups, allowing her to access all authorized functionalities associated with the user groups "Workplace Manager" and "Reservation Manager."

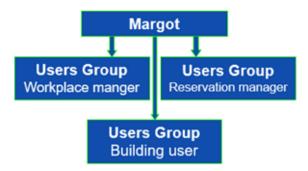
On the other hand, Saskia is categorized as a Building user, which grants her different authorizations and functionalities specifically designed for employee experience.

If there are only a few individuals responsible for maintaining the Planon Application, they can be linked to all available user groups. However, the decision of linking users to user groups ultimately lies with the organization.



In this use case, Margot, being both a power user in Planon and an employee utilizing the Building user functionalities, could potentially be linked to three different user groups. These user groups might include:

Authorization Use-cases





Concepts

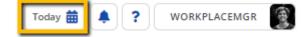
Planon encompasses a variety of functionalities that are present throughout the entire application.

This following sections provides detailed descriptions of the most relevant functionalities that users will encounter.

Reference date

In, for example, Spaces & Workspaces, a reference date can be set at various selection levels and steps to be able to retrieve specific time-dependent data.

For CAD Integrator, this means that the drawing (.orj file) to be displayed should belong to floor attributes that have a start date equal to or earlier than the reference date.



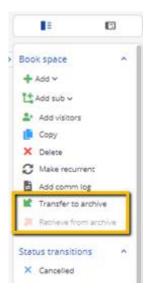
The reference date is set via the **Reference date** button in the Planon toolbar. By default, the reference date is the current date, and it is activated.

Clicking **Reference date** opens a date picker, from which you can select another date (in the past or in the future). Once a new reference date is selected, the color of the button changes and it displays the selected date.

Archive

In many TSIs you can archive elements from the list. For example, reservations that are completed and in the past. When you archive, you can view the archived items again and retrieve them from the archive when required.

Typically, the statuses appear as follows in the action list on the right side of the screen:



Use **Transfer to archive** to archive elements. The elements need to be in the correct system status, such as Completed, Canceled, etc.

When a record is archived, and you have opened the archive, you will see that **Transfer to archive** is greyed out and **Retrieve from archive** is enabled. If you want to retrieve a record, use the latter action and the record is retrieved from the archive.

You can always archive or retrieve from the archive.

In Planon, the action of 'Deleting' indicates that a record or data is permanently removed from the system and cannot be recovered. However, it is advisable to opt for archiving records instead of outright deletion.

To access the archive, you can click the button depicted in the following image. This button is available within each TSI where records can be archived. Upon opening the archive, you will have the option to specify the desired time period for which you wish to access the archived data.



Reporting

Reporting is available in the action panel of each TSI.

Rep	ort	^
\geq	Add form	
Ē	Report	

Reporting enables you to create forms (mail templates), reports (lists, operational sheets) and to show data only.

By using Reporting the user can create reports and save them for future usage. In some cases, predefined reports are available. You can copy these reports and alter them to specific requirements.

Reports are possible to:

- Preview & print
- Edit
- Save as
- CSV
- HTML
- PDF
- XLS: Data only
- XLSS: Data only

For more information about Reporting, we recommend to read the user manual, available via the **Planon Customer Portal > Product download**, or you can request it from your Planon contact.

In addition, the Planon Academy provides standard Reporting training, which are available on request.

Modify within selection

The **Modify within selection** action allows you to change the value of a field for multiple elements at the same time.

This option becomes available in the data panel when you select multiple elements in a TSIs selection level. You can change the values of all fields.

Code	∧ Label
User statuses (65)	
CR10	Reported
CR15	Checked
CR20	Accepted
CR25	Cancelled
CR30	In progress
CR70	Technically compl
CR80	Administratively c
CR90	Rejected
M010	Reported
M011	Waiting on custo
MO20	Proposal
M030	Assigned
MO40	Technically compl

To use **Modify within selection**, you must select elements of a single type. If a selection contains elements of different types (for example, a work order and a reservation), **Modify within selection** is not possible.

Procedure

- Select the elements for which you want to change the field value. For example, the selected personnel have moved to another department and therefore you must change the **Department** and **Work address** fields of these persons.
- 2. On the data panel, click Modify within selection.

Code Print form Con Mail merge report	O No
Icon 🗌 No icon	
Mail merge report	•
ок	Cancel

3. Select the check box(es) of the field(s) you want to modify and enter the values in the selected fields.

It is possible to clear a field for multiple selected elements. If you want to clear a field for multiple selected elements, you must select the relevant check box and leave the field empty.

All fields that have their check boxes selected but do not have any entered values will be cleared.

4. Click **OK** to proceed.

The **Question** dialog box appears.

5. Click OK.

A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

 All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process or select the Select all check box and then click Process selection.

Action on selection

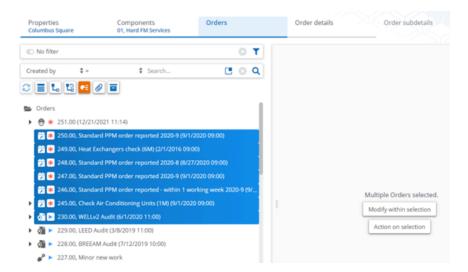
The **Action on selection** option allows you to perform a certain action or status transition for multiple elements at the same time.

This option becomes available in the data panel when you select multiple elements in a TSI.

You can apply **Action on selection** to elements of various system or user-defined types such as main/sub work orders, reservations, and so on.

Procedure

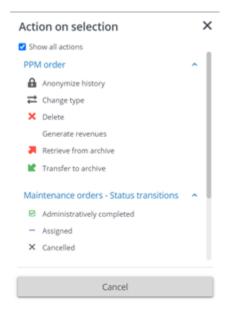
1. Select multiple elements to which you want to apply the action or status transition.



2. On the data panel, click Action on selection.

The **Action on selection** dialog box appears and displays relevant actions available for the selected elements.

In the dialog box, when selecting the **Show all** actions check box, all actions/status transitions available will be shown (including those that can be applied to some of the other types).



If you clear the **Show all** actions check box, only the actions available to all types in the selection will be displayed.

Action on selection	×
Show all actions	
Orders	^
Anonymize history	
➡ Change type	
× Delete	
Generate revenues	
📜 Retrieve from archive	
🖹 Transfer to archive	
Cance	

3. Select the action or status transition that you want to apply to the selected elements.

Though some actions are not present in a TSI due to authorization, they may be displayed in the **Action on selection** dialog box, for the selected list.

A Question dialog box appears.

 Click **OK** to continue. The items are processed, as displayed by a progress indicator.

A list of errors and warnings appears. You can save the error log by clicking the **Save as** button in the top-right corner of the window. This report is subsequently displayed in a new tab in your browser. Click the button next to each item in the error list to view more information about the error.

All items with warnings are displayed at the bottom of this window. Select the check box in front of each warning you want to process or select the **Select all** check box and then click **Process** selection.

Filters & Quick search

In Planon, searching can be done in various ways.

• Search: This box is available at the top right of the screen, and it provides quick access for searching. Note that this feature is not available in all modules.

When you use this search option, it takes priority over an existing filter. Clicking the **Refresh** button will display the filter results again.

- Use CTRL+space to search for an element.
- Filter and search bar

🖸 ІСТ			8 T
City	* =	🗘 Search	© Q

The filter and search bar is available above the elements list. You can define a search query using the search bar and then display data that is only relevant to you. The available search possibilities depend on the element you are currently working with.

You can use one specific field to search on. If required, you can also select a different search field, select an operator, and specify a value.

Operator	Description	
<, ≤, =, ≥, >	Logical operators that compare the search field with the search value.	
<>, <> or empty	search lield with the search value.	
%searchkey%	Operator that enables you to search for entries containing (parts of) the specific word (search key). You can use multiple search keys to fine-tune your result.	
-	The underscore can be used as a wildcard for a single character.	
	H_t finds: Hat, Hut, Hit.	
Contains	Operators that search for the presence of the search value in the	
Does not contain	search field.	
Contains a value	Operators that search for the	
Does not contain a value	presence of any value in the search field.	
Starts with	Operators that search for the presence of the search value at the beginning of the search field.	
Does not start with		
Does not start with or is empty		
Ends with	Operators that search for the	
Does not end with	presence of the search value at the end of the search field.	

The following table describes the search operators in detail.

Operator	Description
Does not end with or is empty	
In Not in Not in or empty	Operators that search for the presence of a set of search values ir the search field.
Between	Operators that search for a range of values in the search field. It includes both the start and end values.
	For orders, using the search operator Between is not possible for alphanumeric fields containing only digits because it throws off sorting. To work around this issue, do not filter on Number , but add No. (SysOrderID) to the layout to filter on the (main) order.

System Administrator

System Administrators will see the following Navigation panel:

Planon	Home	
Q Search		
🛱 Home		
 Accounts User groups Users 	Environment Manage D F F	A P
 Alert settings Alert settings Alerts 	~	
 System info Background actions Log Viewer User sessions 	 5.3 GB free of 10 GB free of € 2/9/2023 € 2/9/2023 	1.3 GB free of 10 GB 2/8/2023
 System settings Licenses Scheduled Jobs Kiosk & panel license Themes Kiosk & booking panel 	^	
 Tools Enterprise talk Templates 	*	

The navigation panel displays a set of Navigation groups with a set of Navigation group Items. In the following paragraphs each Navigation group and the related Navigation group items will be explained.

Home: Environment management

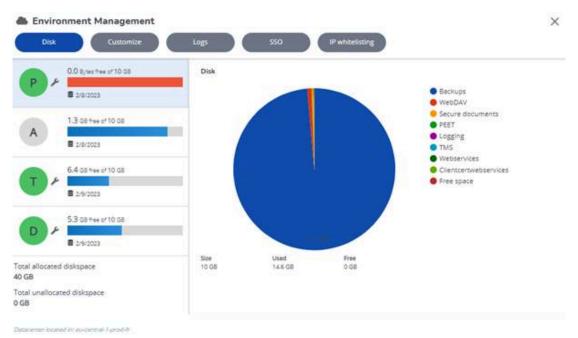
As System Administrator it is possible to use the Environment management Cloud

gadget. When you click on the ellipsis icon

, the gadget is opened.

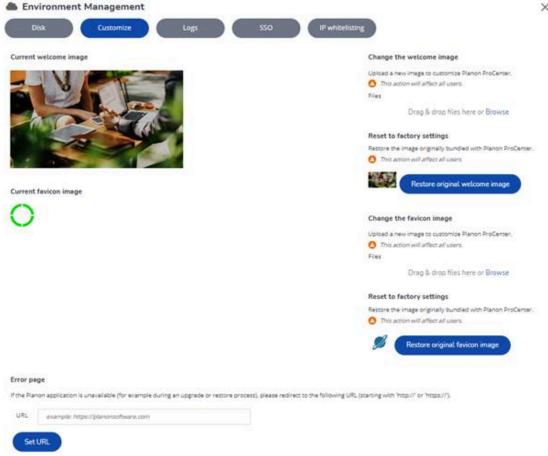
Disk

On the tab **Disk** the System administrator can view the usage of the disk size. Also, the location of the data center is defined.



On the tab Customize you can make changes or reset to factory settings related to:

- Welcome image
- Is the background image that is visible at the login page
- Favicon image
- A favicon is a graphic image (icon) associated with a particular Web page and/or Website
- Error page URL
- If the Planon application is unavailable (for example during an upgrade or restore process), please redirect to the following URL (starting with 'http://' or 'https://').



Logs

Here you can view and download different log files to investigate any strange behavior or performance. In some cases, it can be that Planon Support will ask for some logs. This is the place to get them.



SSO

When an organization will be using SSO (Single Sign On) functionality this is the place to set it up.

Disk Cus	gement tomize Logs	SSO IP whitels	ting	
. Single sign-on realm is:				
ON				
. Keycloak realm				
te following URL is for your Keyclol	ek login paga		Countral	ministrator password
Single sign-on is currently:			head ad	
Single sign-on is currently: On Authentication settings				
On	OpenID connect	Basic authentication	Form authentication	Access key
On Authentication settings Irroduct definition	OpenID connect	Basic authentication		
On Authentication settings moduct definition				
Authentication settings hoduct definition inarytics idk			Form authentication	Access key
On Authentication settings	0	2	Form authentication	Access key

IP Whitelisting

Environment Management Disk Customize Logs	SSO IP whitelisting
Feature not available Please contact Planon to acquire this feature.	
IP whitelist	
1950 (P Address 217.585.71.85	
Plunishing for this Planon instance is done using CDR notation.	
Theory if whereast	
Plane marry your (Prusing CDP resulting use a new line for each IP. For exemption (RE 1988.2 1997) (RE 1988.2 2017)	
CDR examples	
P	COR
192 MA A 200 A 292 MA 2 250 TS2 MA A 300 A 292 MA 2 250	
	192 100 10000 192 100 1 10000 192 100 1 10000 192 100 1 1000 192 100 1 1000 192 100 1 1000

Accounts

User groups

Users

User groups

Within **User groups** TSI the pre-defined and non-changeable user groups are created. Behind these user groups the authorization is set. The System Administrator can create users and link the users to a user group or groups. By selecting a user group, you can see in a list which users are linked to the selected user group:

User grou	ps			Т	oday 🛍 🌲 1
User groups	Users	User settings			
No filter - click to add or sh	now filters	0 1	General		
Description \$ Contains	s 🔹 Search.	0 0			3
0			General		
5			 System name 	PE_Administrator	
System name	Description	1	Users		
User groups (9)			User name	- Description	
Awmdataengineadmin	AWM - Data engin	e account	ITADMIN	Edition system administrator	
PE_Administrator	Edition system ad	ministrator			
PE_BI_Connector	Connect for Analy	tics			
PWE_BuildingUser	Building user				
PWE_FrontDesk	Front desk				
PWE_ReservationsManager	Reservations man	ager			
PWE_WorkplaceManager	Workplace manag	per			
PWI_BuildingAdmin	Workplace Insight	s building admin			
PWI_Viewer	Workplace Insight	s viewer			

Descending to the Users tab you will see the list of all users. Here you can:

- Add users
- Change / set passwords of a user
- Link a person (from the personnel table) to the user
- Link the user to 1 or more user groups

When adding a new user, the following aspects are important:

- User name (Can be an email address)
- Description of the user (can be the first and last name)
- Start date (the date from when the person will be granted access)
- Password never expires (when set to **Yes**, the user will need to change their password at some point).
- Department, Telephone and Address are fields that might already be populated to the linked person. If a person is not linked to the user, these fields can be used.
- Time zone (select from the list).

After creation of the user press save. Now a person (personnel list) can be linked to the user. Also 1 or more user groups can be linked.

User settings tab give the IT admin to define certain user settings. Such as:

- Language (English US or German are the current choices)
- The hour notation (24-hour notation or not)
- The displayed unit of length. Options are meters or feet. When the user, with unit of length is feet, all measurements, for example in space management, are in square feet or feet. This is auto calculated and reflects the square meter value of visa versa.
- Define the different email addresses

- Autoselect first item in list
- Yes: when the user is opening a list it auto-selects the first record in the list
- No: when the user is opening a list no selection is made

For example, Yes:

0

System name Description I User groups (9) Awmdataengineadmin AWM - Data engine account PE_Administrator Edition system administrator PE_BI_Connector Connect for Analytics PWE_BuildingUser Building user PWE_FrontDesk Front desk PWE_ReservationsManager Reservations manager PWE_WorkplaceManager Workplace manager PWI_BuildingAdmin Workplace Insights building admin PWI_Viewer Workplace Insights viewer

For example, **No**:

C

System name	Description
🖉 User groups (9)	
Awmdataengineadmin	AWM - Data engine account
PE_Administrator	Edition system administrator
PE_BI_Connector	Connect for Analytics
PWE_BuildingUser	Building user
PWE_FrontDesk	Front desk
PWE_ReservationsManager	Reservations manager
PWE_WorkplaceManager	Workplace manager
PWI_BuildingAdmin	Workplace Insights building admin
PWI_Viewer	Workplace Insights viewer

- Theme changes the look:
- 1– Planon Light

Planon	User gro	oups				today 🗰 🔺	? ITADMIN
Q. Search	Uter groups	Users	User semirgs				
R Hame			consporting ed.	-			
& Accounts	 No froe - choi to ad 	EN DIANA	General				🖟 User settings 🛛 🔺
Deergeoogs Unergeoogs Unergeoogs Alert settings System info System settings Xr tools	C User setting (1) () User setting (1) magnetic - -	-1	User Trensutation Streamstation Disconstruct Language Use S4-Annur Instantion Disconsynet and a dimergin Renyby entrait a dimergin Sendom's entrait a dimerses Servicest's annual address Consultations Consultations Consultations Autointement fright them in for Themin	1140403, genue system adm 1931 Organ VS Organ meteori C. 1946 T. Parch Light	 ○ to: ○ to: ○ to: 	0 2 0 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	445 Hourd Laterate Contrast Sectors Keport - Asset
	Court AV	None					Canan Saw

• 2 – Planon Dark

Planon 9. seeth	User gro	Users	User settings			Today 👪 🔺	7 ITADMIN	
4 Home			denne synthete ad					
& Accounts	No filer - cick to add o	the OT	General				User settings + Ast	
C then	User User matrix		Translator Partor ProCemen Language	RADMIN, Editors system administrator (*) nex. Engine util	0 No	0	Constant and	
 Alors settings 			Dep 24-hour notation	O 100				
O System into			Bigleyed unit of length Reply errol address				a legen	
C System settings			Senter's enail address Big email address			000		
🗶 Tools			Contact's entant address Automatics first larm in the Discover	C Yes 2 Planor Dark	0.5m	8		
							Coul	

• 5 – High contrast

Planon	User groups				Today 箇 🔺	? ITADMIN
Q Search	User groups Users	User settings				
f Home						
Accounts	3	General				• Uter settings •
Diergroups		. User	ITADMIN, Edition system adm	invitoration		+ Ast
😅 Ukers	User Unity name	Transletor	Cm	ie		Clear user screen settings
Alert settings	THOMIN	Planon ProCenter Language Use 24-hour notation	English L/S	0 ме	0 3	
O System info		 Displayed unit of length Broty email address 	meters.		Č	Report -
•C System settings		Sender's email address Box email address			C	
🗶 Tooh		Contact's email address				
		I Autoreset first item in list	Cites	O No		
		· There	5, High contrast		G	
	Court Al None					Canal See



This is a web form that is made available to create and modify users in a different way. The principle is the same as the **Users** tab in the TSI **User groups**. You can search for, add or edit users.

Planon	User gi	roups				tieday 🚞	٠	? ITADMIN	1
Q Search	User groups	Users	User settings						
R Hame			contestant at	-					
Accounts	 No froer - choi to 	AND THE C T	General					User settings	
I thergroups	0		+ User	7325/01 Editor typest administratio			8	+ 400	
@ liters	User Uter name	+1	+ frenesator	Tes	C to			D Reard Linkerian	
	C User settings (1)		Parior ProCerter Language	English US		8	0	Ceerson screen s	renp
Alert settings	ITACIANN		Use 24-hour notation	0 100	0.98			Report	
System info			 Displayed unit of length 	metery			*	B Aspert	
			Reply email address Sender's email address				2	D report	
 System settings 			Server's email address Box email address						
t Tools	-		Consetts errait address				6		
			· Autometect first issue in list	C.W.	O No		-		
			· Thems	1, Panon Light			B		
			Autometers first same in list		O 149				
	Court Al	Sone						Term 1	

Alerts settings

- Alerts settings
- Alerts

Alerts settings

If you have created multiple Alerts TSIs in your navigation panel, you can specify in **Alert settings** to which **My alerts** step you want users to navigate when they click the active **Alarm** button on the Planon toolbar. In Planon Workplace Edition, this is default set to **My alerts**.

Alerts

The Alerts TSI allows you to specify alarms and notifications for an action that is to be completed at a set time. Alerts uses data added in other TSIs. This is dependent on the business object for which the notification is selected.

Notification definition

The general properties of a notification comprising of a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

The notification definitions are added and maintained at Alerts > Notification definitions. Adding a Notification- / Notify once definition:

General Perfor	mance logging	Audit info	
General			
• Code			
Description			
 System status 	1, Inactive		1
Alarm info			
Recipients report			
 Alert condition 			
 Use reference date 	O Yes	C No	
Mail template			
Attachment mail tem			
Send attachment as P	O Yes	O No	
 Store mail attachment 	O Yes	O No	
User running the alert	ITADMIN, Edition	n system administrator	8 2
Planning			
Schedule			
Start date-time	20		ត
Last result			
Next run date	20		

Define code and name.

By linking users to a notification definition, you limit emailing notifications to accounts in Planon. By specifying a recipient's report*, you can extend this functionality to people that do not have a Planon ProCenter account.

(*Create recipient report example)

Alert condition: create and/or link the condition that you need for the notification to be activated.

Mail template is a template that can be linked that is used as the email that is being send.

Under **Planning**, schedule the frequency of checking when a notification needs to be sent.

Notify once definition

The general properties of the Notify once definition comprise a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked. The notification will only be sent once. To avoid unwanted email traffic, notification of subsequent matches of the condition will be skipped.

- If you delete and recreate the Notify once definition, the items for which a notification was already sent will be notified again.
- If you change the condition filter or choose another condition for the same business object definition, the items for which a notification is sent will not be notified again.
- If you change the condition to another business object definition, (Reservations first and then Persons) you will get all new matching items.

The Notify once definitions are added and maintained at **Alerts > Notify once definitions**.

Alarm definition

The general properties of an alarm comprising of a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

In Alerts, alarm definitions are added and maintained at Alerts > Alarm definitions.

See the following example of an alarm definition:

Do not forg

Do not forget to link the alarm definition to a user and set it to Active.

General Per	formance logging	Audit info		> Alarm definitions	^
General				+ Add	
Code	MP immeasurable	t)		X Delete	
Description	-			Sorward	
 System status 	0, Active		8	Poliward	
Alarm info				Links	^
• Icon	\$*0 \$*0		C		
Recipients report				Contraction of the second	
Alert condition	SWI_001		8 8	Status transitions	^
• TSI selection step	Measurement poi	nts	8 8	Inactive	
Planning				Show flow diagram	
• Check at login	O Yes	C No		Report	^
Schedule	Hourly			B Report	
• Start date-time	2/7/2023 07:0	9	1	Meport	
Last result	Execution OK: 0 it	ems found.			
Next run date	Lo 2/14/2023 11:	09			

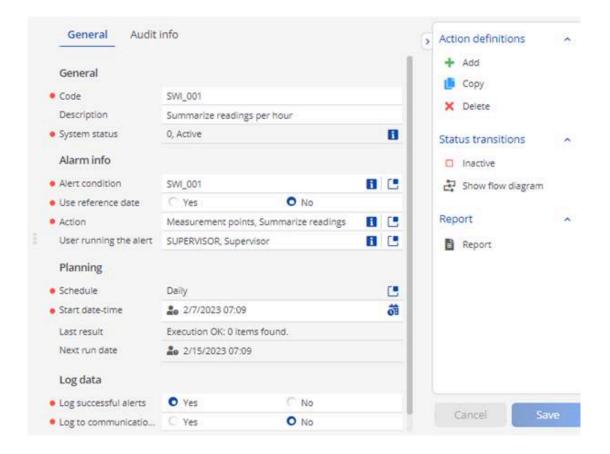
Action definitions

The general properties of an action comprising of a filter that defines a condition to be periodically checked and a schedule that determines how often and when the condition is checked.

In Planon ProCenter users can automatically perform actions based on a schedule.

In Alerts action definitions are added and maintained at **Alerts > Action definitions**.

See below an example of an action definition: NOTE: Do not forget to set the action to active.



System info

Background actions

Log viewer

User sessions

Background actions

Background actions are actions that take longer than 30 minutes to run on the Web Client. The maximum session time on the Web Client is 30 minutes. Consequently, if you are running actions that take longer than 30 minutes, there may be session timeout errors.

Log viewer

Log viewer enables you to view information, warnings, or errors regarding events (system feedback that may occur, for example, when importing a language file. This data

is particularly useful to the Planon Administrator, who can then use Log viewer to trace system activities and diagnose any problems that occurred.

C No filter		ं र	General Log message Audit info		Simple event logs
Application log type \$ Contains	Ø Search	0 Q			Simple event logs Resend event log email
C =			Source	import language	Transfer to archive
	Insertion + User User name		 Application log type 	INFORMATION	Retrieve from archive
import language	2/4/2022 2		Details		× Delete
import language	2/4/2022 2		Language file import of //Read: 92323 record	5,	
import language	2/4/2022 2		385 records were not 77380 records were n	imported, since they having issues. tot imported, since these were already corre	Report
import language	2/4/2022 2		0 records were not imp	ported, because they have not been translati seen imported because they are user-transla	ed. B Report
import language	2/4/2022 2				
import language	2/4/2022 2				
import language	2/4/2022 2				
import language	2/4/2022 2				
Import language	2/4/2022 2				
Import language	2/4/2022 2				
import language	2/4/2022 2				
import language	2/4/2022 2				
import language	2/4/2022.2				
Import language	2/4/2022 2				
import language	2/4/2022 2				
import language	2/4/2022 2				
Import language	2/4/2022 2				

Actions in Log viewer:

The following actions are available in Log Viewer.

- Delete
- Transfer to archive
- Retrieve from archive
- · Resend event log email

User sessions

The User Sessions TSI allows you to view all currently active Planon ProCenter user sessions as well as previous user sessions. This enables you to see who is currently logged on to the application and who was previously logged on and is subsequently logged off.

Log-on and log-off time stamps are recorded in both the server's and the user's time zone. To distinguish between the server's and the user's time zone, multi-time zone must be enabled.

System settings

Licenses

Scheduled tasks

Kiosk & panel license

Themes

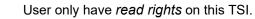
Kiosk & booking panel

Licenses

TSI **Licenses** gives insight into the licenses available within the customer's Planon environment.

There is an overview on:

- Licenses
- App Licenses
- Volume Licenses
- Product Licenses
- Solution Licenses
- Module License usage
- Excess License usage



Scheduled tasks

In **System settings** > **Scheduled tasks** you can view and modify the schedule for system jobs and task user extensions scheduled by the user in Planon ProCenter.

Dependent on the Edition (Insights or Engagement and possible add-on, e.g. C4C or C4A), tasks need to be set to active.

Schedul	ed task	Description	Used in
SYSACT	IONS	Triggers Action tasks	Alerts and Notifications
SYSALAI	RMS	Triggers Alarm tasks	Alerts and Notifications
SYSAWM	SYSAWMSUMMARIZEREADING measurement point reading (daily, weekly, monthly)		Agile Workplace Management (AWM)

Cleans up background actions. In general, data is deleted when in status <i>Completed</i> or <i>Con</i> older than 7 days. For PMFS and AppSuite, data is deleted only when in status <i>Completed</i> and <i>Sy</i> older than 7 days. System tasks for cleaning up data related to inbound & outbound messages. Deletes processed messages older than <i>1 day</i> . Forcessed means messages with the status:	Planon application PMFS / AppSuite npletedWithErrors and SysChangeDateTime is vsChangeDateTime is Event Connector
deleted when in status <i>Completed</i> or <i>Con</i> older than 7 days. For PMFS and AppSuite, data is deleted only when in status <i>Completed</i> and <i>Sy</i> older than 7 days. System tasks for cleaning up data related to inbound & outbound messages. Deletes processed messages older than <i>1 day</i> . GEProcessed means messages with the	vsChangeDateTime is
AppSuite, data is deleted only when in status <i>Completed</i> and <i>Sy</i> older than 7 days. System tasks for cleaning up data related to inbound & outbound messages. Deletes processed messages older than <i>1 day</i> . Frocessed means messages with the	
cleaning up data related to inbound & outbound messages. Deletes processed messages older than <i>1 day</i> . Frocessed means messages with the	Event Connector
Deletes processed messages older than <i>1 day</i> . GE Processed means messages with the	
messages with the	
•BOInboundRawMessage	e: Transformed
If there are Inbound raw messages with status <i>Failed</i> or <i>Queued</i>	with
the same message ID, they are skipped from deletion.	
•BOInboundMessage: Pro	ocessed
If a business event references an inbound message, it is skipped from deletion.	
	ne: Sent
	deletion. •BOInboundMessage: Pro- If a business event references an inbound message, it is skipped from

36

_

Scheduled task		Description	Used in
		•BOOutboundMessage: Trans	formed
	Q	If there are outbound raw messages with status <i>Failed</i> or <i>Queued</i> with the same message ID, they are	
		skipped from deletion. In addition, this task also deletes <i>Failed</i> messages for these business objects that are older than the Data	
		cleaner setting (default: 91 days).	
SYSEVENTLOG_CLEAN	NER	Cleans simple event log and linked event log entries.	Planon application
		Data is deleted when <i>SysInsertDateTime</i> is older than 7 days. Data is deleted in chunks of 100 records.	
		Orphan child records and all orphan records in PLN_EVENTLOG_BUSINESS are deleted in chunks of 10.000.	SOBECT
		This task runs for 20 minutes and then stops. If necessary, you can run it multiple times (by adjusting the schedule) to get rid of	
		a bulk of old records.	

Scheduled task	Description for Outlook (Exchange) appointments	Used in
SYSEXCHANGESYNCLOGCLE	ANoters cleaning Connect for Outlook synchronization logs	Exchange
SYSMOBILEFIELDSERVICES	Triggers action to receive messages from PMFS Movilizer Cloud	PMFS
SYSUPDATE_LFC_SNAPSHOT	IDetermination update of the Mongo DB. Should only be enabled when a successful initial export of the Mongo DB has been done (using Connect for Analytics).	Connect for Analytics
SYSMOVE_STUCK_BA_TO_EF	RECECts if a background action is stuck in a queue or is no longer running. Subsequently, the action will be set to the status "Completed with error". When starting this task, a warning	Planon application
	message appears, see: Multi-gear.	
SYSNOTIFICATIONS	Triggers Notification tasks	Alerts and Notifications
SYSNOTIFY_EVENTBASED	Triggers Event based notification definitions	Alerts and Notifications
SYSNOTIFY_ONCE	Triggers Notify once notification definitions	Alerts and Notifications
SYSNOVA_PMFS_CHECKER	Triggers the automatically retry of a failed background	PMFS AppSuite

Scheduled task	Description action for PMFS AppSuite.	Used in
SYSPMFS_CHECKER	Triggers automatically retrying of failed background actions for PMFS Movilizer	PMFS
SYSPPM_SCHEDULED_PROFI	ITESgers the generation of PPM orders	PPM
SYSSESSIONDATA_CLEANER	Deletes old session data (older than 7 days).	Planon application
SYSSUBSCRIPTIONCHECKER	Subscription checker Connect for Outlook	Exchange
SYSTASK_CLEANER	Triggers cleaning tasks. Data is deleted when in status <i>Notified</i> , <i>Executed</i> and <i>L</i> older than 7 days. The task will run using an SQL	Alerts and Notifications astStateChangedDateTime is
	statement for better performance.	
SYSTASKUSEREXTENSION	Triggers cleaning tasks user extensions	Connect for Building Advisor, Connect for Calendars
SYS_C4C_ARCHIVE_JOB	Triggers Archive tasks	Connect for Calendars
SYS_C4C_MAIL_REPORT_CLE JOB	Angers cleaning the mail reports	Connect for Calendars
SYS_C4C_REMOVE_OBSOLET JOB	T <u>Frigg</u> ers removing the outdated tasks	Connect for Calendars
SYS_APPS_CHECK_FOR_UPD	D &The cks for app updates in the Planon Marketplace. The task runs every 6	AppCenter

Scheduled task	Description	Used in
	hours (minimum); this is configurable.	
SYS_APPS_CONFIGURATION EVENTS	_Upgrades all Platform apps during a Planon upgrade.	AppCenter
	Do not deactivate this task!	

Themes

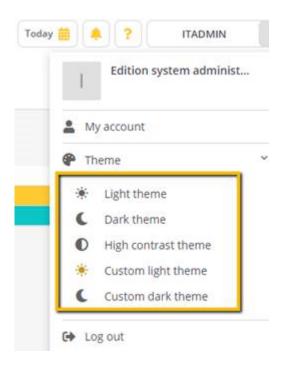
Create custom themes and branding logo.

Themes settings:

General Audit info			
Custom theme activated?	O Yes	O No	
Primary color of custom theme			0 🗄
Secondary color of custom theme			ි 😫

- Custom theme activated
- When set to **Yes** all the created settings will be available. The user can choose the preferred theme.
- Primary color of custom theme
- The chosen color will be used in different areas
- Secondary color of custom theme
- The chosen color will be used in different areas

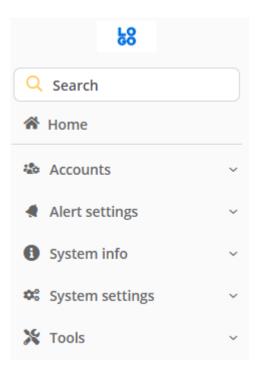
When set and active the user can choose between the following themes, meaning the original settings stay intact and available (use the non-custom theme to go back to the original theme):



Themes logo

Here it is possible to upload a customer logo that is available when printing and for the different themes. It can be that different color logos are required when using a dark or light theme.

When theme is activated, the Logo will appear in the top left corner:



Kiosk & panel license

Rich Inerial Court

In this TSI you need to create the records that are going to be used by the Kiosk / Room booking panels.

For Kiosk define a list of floors that are used for the Kiosk.

I IN THE CONTRACT	r shave filters		0 T	General		
date :	# Conterns	1 Seco.	0 9			
0				Not travulated		
				• Code Description	02,09	
foor Property Same	+ Proce Proce Name	Egener maturitiene		Description	The Concourse #32-05_bit Asian	
Cost transit (2)				+ Fast	15, Sm Repr	0.0
Compare the office parts	- Hich Steam	Gaerand		A Speen status	2 Usersed	
he Concourse #10.45	let fuer	Laterand In		Next translated		
wind .	Growing Search	Greened				
				maertan date sime	2. Urboliz 202018	
				Modificación deserme	An 12/0 (2022 20:20116	
				inserted by	BUILDINGADHIN, April (Inspire only)	1
				Modified by		

For Room booking panel define a list of reservation units that are used for room booking panels.

CONTRACTOR DAMEST	prove Titlers		0 T	General		
Chile	\$ Circlere	# Service	0 9	Statement of the second		
0				General Information		
	25	1.5	6	+ Cide	1 C	
	ne » Reservation unit_blame	Reservation unit Cade	System matus toane	Description	Meeting room - Perseus	
Roam Socking Panel Ice	rue (1)			· Reservation until	UTA Period.	8 8
Brances hell office park	Peteral	1013	Literand	· System status	2. Unimod	8
Brevene hill office party	99	1128-	Linewed -	Additional information		
and	Touch-down deep	1_30	Licensed	Appendiate and an appendix		
100	Aprile	1000	Lorned .	Internal data tine	A \$1500210708.08	
and .	By	0.08	Lieved	Molfocor-Jan.trea	4 8/15/2022 37/29/38	
				interfect by	If solving Edition system administratory	0

Kiosk & booking panel

You can enable end users to view, add, edit, or delete reservations via the Kiosk or Room booking panel touch screen.

First, you need to have a general definition and then you will be able to access the specific settings for Kiosk and Room booking panel. This definition is already available.

See detailed information in Kiosk & Room booking panel PSS definition where you can see what and how you can adjust the settings.

Kiosk & booking panel

🗇 No fitter - click to add or show fitters 🛛 🗘 🍸	General settings T	ranslations Environm	ental information	Environmental ranges Gen	eral Audit info
Code 🕴 Contains 🖡 Search. 🔘 🔍					
0	 Default reservation duration 		60 minutes		
~	 Authentication mode 		Mehual look	up.	
PSS definitions	 Sod order meeting room 		RES_02. Spece	e reservation (auto-approved)	
C3 01, Knsk & room booking panel	Standard sub-cleaning order Cleaning order statuses				
	Code Nothing found	- Name			
	 Std order flexible workspace 		R005, Desk re	servation (auto-approved)	
	 Cancel status meeting room 		RS40, Cancell	ed .	
	 Cancel status flex workspace 		RS40, Cancell	ed	
	 No. of person code characte 	rs on display	10		
	 Reservation statuses 				
	Code	- Name			
01, Kosk & room booking panel	R520	Confirmed			
B Kicak	Use person data for availabil	iny?	O Ves		○ No.
Room Booking Panel					

URL Kiosk

For each Kiosk a URL is required. In the Kiosk settings (see below) multiple settings can be set. These settings will be accountable for all Kiosks of the selected floor.

In his has not be still or provident O	Settings Coloring						
time I bream I territ. (3) Q. 3	Ere (4), Fact The		Trips / Auf Tori grad	particul in testin 842]		
PELindvisory	· Refeat sea (sea)		89.				
ES 17. Som & min having pare	· Appresentations?		O rec			0.64	
Construction of the Constr	· Eth marvature?		O 181			C 84	
	· Concel reservement		0.100			17 Mail	
	· Discompanies		O 1m			CAR	
	· Providencipler		0.111			Citie	
	Comparison set at some						
	· Draw spectric reservators	to wheth	O 100			1.64	
	· approving the vehiclose		Reservations of the	in which the second and			
	-						3
	Property Property state	+ Property laws	Free Cade	Proz Swine	tune		
Ch. Cl. Cont Lange Postering Lange	100	Barries to after peri	14	41.507	45 700		
B free	-	TreConsulter#10.00		21.50	the first		
A fair from the	- C - C - C - C - C - C - C - C - C - C	. weil	- 10	Grave Rep.	Souther		
	· Do-Hold Buch made and		780			0.50	
	· Danet much model worth as	and 10 - 1000	-0				

Also, the colors used on the kiosk can be adjusted to customers' requirements:

Chefter do tradicionative free Company I losers,	sent count		
0 10 PS petrices ED 19, taue A care summigree	Constructionserver Construction for two monopoly Constructions for two monopoly Constructions Construction Constructions Construction Constructions Construction Constructions Construction	 	000 000 000 000
O. Cont & number point Total Total Source Record Record			

When activating a floor on a Kiosk the following URL is used with the Building code and Floor code:

Example: https://<customer>-prod.planoncloud.com/kiosk/ksk/BP/01/ propertycode/floorcode

When activating a reservation unit on a room booking panel the following URL is used with the Building code and Room code:

Example: https://<customer>-prod.planoncloud.com/kiosk/rbp/BP/01/ propertycode/roomcode

Tools

Enterprise talk

Templates

Enterprise talk

The Enterprise Talk TSI enables users to import data from another application or data source into Planon ProCenter and to export data from Planon ProCenter to an XML/CSV.

Data onboarding

Users can be authorized for using Enterprise Talk. The data imported into or exported from Planon ProCenter, however, is not subject to authorization.

Enterprise Talk can be used to achieve the following objectives:

- To support a Planon ProCenter implementation process by importing data from legacy applications into Planon ProCenter.
- To interface Planon ProCenter with other applications by sharing information. For example, by interfacing a Financials Management

system with Planon ProCenter, you could import invoice amounts as actual costs into Planon ProCenter.

One example of an Enterprise Talk definition that is available in the Edition is the PWE_onboarding.

With this Import definition you can import a large set of data related to:

- City
- CostCenter
- Position
- Department
- SpaceCategory
- SpaceType
- SpaceStandard
- WorkspaceType
- UsrEmployee
- Occupancies

This list can be extended in the future, or a new definition can be created, for example to import measurement points.

Templates

This TSI holds the list of the standard templates that can be used for email notifications. These templates can be in HTML or docx format.

Example



Your booking has been confirmed.

Booking details

Number	<number></number>
Start date	<startdateandtime></startdateandtime>
End date	<enddateandtime></enddateandtime>
Building	<property></property>
Floor	<floor></floor>
Workplace	<reservationunit></reservationunit>
Comment	<comment></comment>

Regards.

Workplace team

Space & Reservation Manager

When you are a Space & Reservation Manager you will see the following Navigation panel (this user is a combination of the user groups 'Workplace Manager' and the 'Reservation Manager):

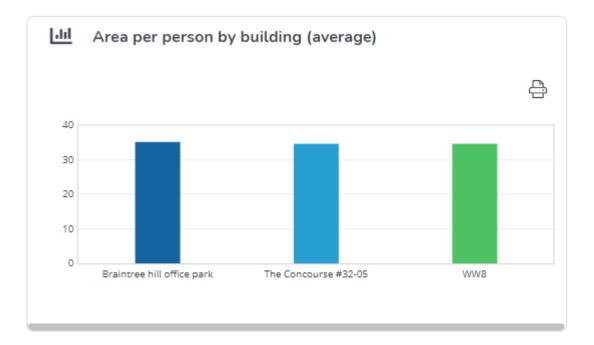


In the navigation panel a set of Navigation groups are available with a set of Navigation group items. In the following paragraphs each Navigation group and the related Navigation group items will be explained.

Home

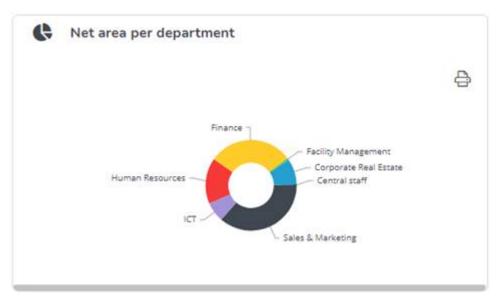
As Space & reservations manager the home page will present a fixed set of Dashboards. The titles of the dashboards are self-explanatory in most cases.

Area per person by building (average) Net area per department Spaces by space standard (net area & count) Spaces by space type (net area & count) Bookings to be approved Area per person by building (average)

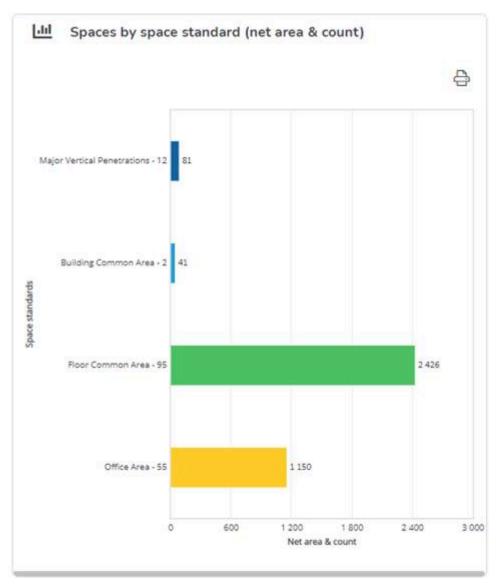


Net area per department

This chart shows the % net area allocated to departments of the total net area.



Spaces by space standard (net area & count)



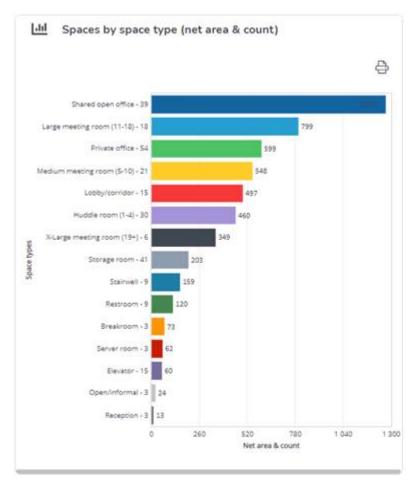
Based on the space standards defined it shows the number of spaces linked to a space standard and the net area combined.

When selecting a bar, for example Office Area, you can zoom in to a list report. Here you can see all 55 spaces and where they are located.

acetype i faatet			
			C (
			< 3 - 30 of 55 3
Property	Floor	Spece number	Name
21, Braintone hill office park	4m foor	1112	Private office
11, Braintrike hill office park.	4th Roor	9113	Private office
IT, Brannie hill office park	-Ach Roor	5154	Private office
IT, Braverae hill office park	-Ach Roor	11154	Private office
Cl, Snammer Hill office park	All form	1116	Private office
11, Snaintree hill office park	Alph Roper	8187	Private office
It, Braintree hill office perik	Act Roor	1118	Private office
1, Brantree foll office park	data Rodar	1119	Proate office
a, www.	Ground hoor	5539	Private office
1, Braintine Hill office park	4th Room	*****	Private office.
LE, WWR	Ground Roor	1134	Private office.
11, Braintree hill office park.	Adh Rope	9134	Private office
ra, www.	Ground foor	1136	Private office
1, Brannee hill office parts	4th Room	11.34	Private office
ti, wwit	Ground Roor	11.00	Private office
II, Braintree Hill office peril	Am floor	1139	Private office
33. WW0	Graund fear	1140	Private office

Spaces by space type (net area & count)

This dashboard presents the number of spaces linked to the defined space types. Per space type the total net area is summed up of all related spaces.



When selecting a bar, for example Huddle room, you can zoom in to a list report. Here you can see all 30 spaces and where they are located.

In Space details

Spaces \ Spaces

[] 음 1 - 30 of 30

Property	Floor	Space number	Name
WWB	Ground floor	1108	Eris
The Concourse #32-05	Sch floor	1108	Eris
Braintree hill office park	4th floor	1108	Eris
WWB	Ground Roor	1123	Saturn
The Concourse #32-05	5th floor	1123	Saturn
Braintree hill office park	4th floor	1123	Saturn
WWB	Ground floor	1129	Huddle room
The Concourse #32-05	5th floor	1129	Huddle room
Braintree hill office park	4ch floor	1129	Huddle room
WW8	Ground floor	1130	Huddle room
The Concourse #32-05	5th floor	1130	Huddle room
Braintnee hill office park	4ch floor	1130	Huddle room
wwe	Ground floor	1131	Huddle noom
The Concourse #32-05	Sch floor	1131	Huddle room
Braintree hill office park	4ch floor	1131	Huddle room
ww8	Ground floor	1132	Huddle room
The Concourse #32-05	5th floor	1132	Huddle room

Bookings to be approved

When your organization has defined that some bookings need approval, the space & reservation manager can see the list of all bookings to be approved. This list presents an auto search result. Searching for specific bookings can be done by searching by booking number and booking description.

Number			Search	
✓ Show more set	earch options			
				1 - 1 of 1

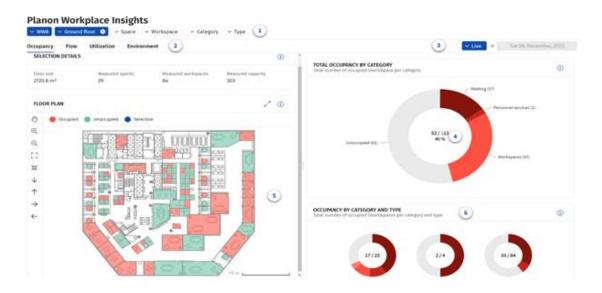
When selecting a record in the list below a new window will open where more details are presented of the booking where the booking can be **Approved** or **Rejected**.

 \times

Planon Workplace Insights dashboards

General

General



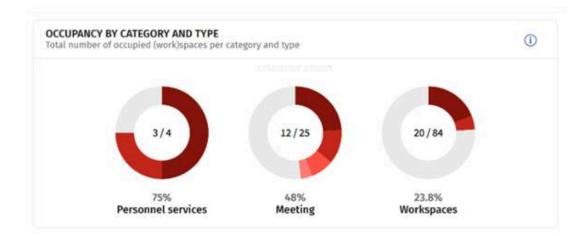
Live data

What's happening NOW?

Every minute, the dashboard is automatically refreshed to show you the most recent data.

That comes in handy when you want to understand the current status of occupancy, flow, and other variables, and to check if everything is working smoothly as it should.

Click the gif to zoom in



Past data

Discover trends

View data captured for a particular day, week, or month to discover trends and spot anything that is not looking quite right.

For example, for occupancy, see which spaces are **used often** and which ones are no one's favorite, and identify **peaks** and **duration of occupancy** of each space*.

With this knowledge, you can make accurate decisions to better leverage building space or solve any anomalies as soon as they arise, saving you money in the long haul.

* The same can be done with utilization, flow, and environment conditions.

Click the gif to zoom in.



Deep dives

Each Planon Workplace Insights module has a corresponding Deep dive section.

These are charts that have been specifically designed to enable workplace strategists to

- Analyze a broader trailing 12-month data set to make strategic decisions about their RE & workplace portfolio.
- Aggregate or combine data for multiple properties to get a bird's eye view of the selected portfolio.

• Benchmark properties to analyze time-based occupancy and net utilization metrics.

On each Deep dive set (e.g., Occupancy, etc.) you can filter on different aspects such as Property, floor, space category, etc. This will have an effect on all dashboards within the deep dive set.

When a filter is applied, the top-right corner of each dashboard displays an icon.

Space & occupancy

Spaces & workspaces

Personnel

Mapping options

Spaces & workspaces

This TSI is to set up your property portfolio and the related floors, spaces, and workspaces.

Properties

It starts with creating your property table. The property table has a hierarchy of three levels. In Planon Workplace Edition you can create:

- Site
- Building
- Terrain

Each type of object has its own set of data fields. In general, they are the same, but there are some differences. In this document we will focus on the type **Building**.

Spaces & workspaces	Protection of the local division of the loca	Disaster.			?
Chine consideration		T Bearing Descentions and of	2		7 ten
1 - Densery 1 - Densery 1 - Densery 0	6	4 •••••	r Tarana na marana	071*	+ ton prove + ton prove have + ton ton ton + ton + ton
		Satur Sanaharangka	1 millionagenet	•	 Pass Pass-aprica Pass-receive action
		Salara Sa Base Derry Draw	di barran in dia pan Barran Recola di una bas	n e n e	Balan barattara R. Josephia and State V. Danasti R. Danasti R. Danasti
		2 Franceson Franceson Generation Franceson The sector of states () - The ()	erena Dougo	n e	1 mm

Most of the fields are self-explanatory. The following fields are explained in detail:

- City: Choose a city from the list (**Base data** (space) > **Cities**)
- Country: Choose a country from the list (This list holds all possible countries including the Country code)
- Time zone: Choose the time zone that is applicable for the building (This is a predefined list of all possible time zones).
- Max allowed people: Define the number of Maximum allowed people in the building. This data is used when using People flow sensor on building level.
- Environmental profile: Define which Environmental profile is applicable for this building. When empty, the default Environmental profile will be used. When multiple profiles are available, choose the one that is applicable for this building. (User group Building Admin: Base data > Profiles & targets).
- Calendar: Define the Company calendar that applies to this building. When empty, the default calendar will be used. (Base data (space) > Calendars).

Components

The selection level **Components** holds the following selection steps:

- Floors
- Define for each building the floors that are available in the building. When adding a floor define the following:
 - Reference date (See Reference date)
 - The building
 - The floor (there is fixed list available)
 - The name of the floor is auto populated based on the description of the chosen floor
 - Floor sequence is auto populated by the chosen floor (for example, 3^{rd} Basement floor = -3, 6^{th} floor = 6)
 - Start date (based on set reference date) or can be changed on 'Floor attributes'
 - Max allowed people: Define the number of Maximum allowed people on the floor. This data is used when using People flow sensor on floor level. This can be added/adjusted on 'Floor attributes'
 - Font sizes: Here you can define the font sizes for the different attributes in the drawing. This will result in a better view of the data on the floorplan.

General Font sizes	-
Default font sizes for this	drawing
Unit of length	
Title font size	150
Legend font size	150
Space font size	46
Asset font size	127
Person font size	127
Fixed workspace font size	25
System fields	
Flexible workspace font size	407

• You can view details of the floor via data view or the floor in CAD integrator view:



Space categories

In this selection step you can group spaces based on the required cleaning work program - for example office and sanitary spaces.

Floors	Space categories	Space types	Departments	Cost centers	Space standards
O No	filter - click to add or sh	now filters			8 T
Code	\$ Con	tains	Search		8 Q
0					
Code		 Description 		l.	
🗌 Space	e categories (5)				
010		Office			
020		Meeting			
030		Circulation			
040		Personnel s	ervices		
050		Vertical pen	etration		

A space category can be linked to a space to group and report on it. This is used in for example:

Planon Workplace Insights Dashboards

CAD Integrator > Space mapping

Space types

In this selection step you can view or enter spaces with a specific type of space usage – for example offices, warehouses, or conference rooms.

Q

When spaces are linked to a space type it is possible to assign them to people/ employees. To be able to do so, the field **Assignable?** needs to be set to **Yes**. If there are workspaces related to this space the desks are also assignable. If the space is not assignable, the workspaces are also not assignable.

Floors	Space categories Space types	Departments
O No f	ilter - click to add or show filters	
Code	Contains Search	
0		
Code	 Name 	1
Space	types (16)	
01	Huddle room (1-4)	
02	Medium meeting room (5-10)	
03	Large meeting room (11-18)	
04	X-Large meeting room (19+)	
05	Private office	
06	Shared enclosed office	
07	Shared open office	
08	Restroom	

A space type can be linked to a space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- CAD Integrator > Space mapping

Departments

With this selection step you can filter spaces by department.

As Space & Reservations manager you can adjust this list. The departments table has a hierarchy of max 10 levels.

Floors	Space categories	Space types	Departments
O No f	filter - click to add or sh	now filters	
Code	Contains	\$ Search	
0			
🕂 Dep	artments		
-	00, Central staff		
	00.01, Corporate So	cial Responsibili	ity
- 11	01, Finance		
-	01.01, Control & Ac	counting	
	01.01.01, Corpora	ate Operational /	Audit
	01.02, Treasury		
	01.03, Fiscal Affairs		
	01.04, Risk Manage	ment	
	02, Human Resources	;	
•	03, Research & Devel	opment	

- 04, ICT
- 05, Procurement

A department can be linked to a (work-)space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- CAD Integrator > Space mapping

Cost centers

With this selection step you can filter spaces by cost center. Cost centers are units like departments which are used in cost accounting and to which costs can be charged.

As Space & Reservations manager you can adjust this list. The cost center table has no hierarchy.

Floors	Space categories Space types Departments	Cost centers
💿 No f	ilter - click to add or show filters	8 T
Code	🛊 Contains 👙 Search	8 Q
2 🖬		
Code	 Name 	
🖉 Cost d	enters (21)	
010000	Finance	
010100	Control & Accounting	
010101	Corporate Operational Audit	
010200	Treasury	
010300	Fiscal Affairs	
020000	Human Resources	
030000	Research & Development	
030100	Innovation	
030200	Manufacturing	
040000	ICT	

Space standards

In this selection step you can select spaces according to a hierarchical system of space standards. You can edit the main space standard and make changes to the hierarchy as required. By default, the Edition has the BOMA, US Standard list:

Floors	Space categories	Space types	Departments	Cost centers	Space standards		
O No f	ilter - click to add or sł	now filters			8 T		
Code	\$ Con	tains	Search		8 Q		
3							
😑 Spa	ce standards (9)						
- 🖿	BOMA, US Standard						
- 5	GBA, Gross Building	g Area					
-	🖶 GBA.MA, Measur	ed Area					
	📕 🗁 GBA.BCA, Build	ling Common Are	a				
	GBA.BCA.FC	A, Floor Common	Area				
	GBA.BRA, Building Rentable Area						
	🔻 🔚 GBA.BRA.FRA, Floor Rentable Area						
GBA.BRA.FRA.OA, Office Area							
	GBA.MVP, Major	Vertical Penetrati	ions				

The selection level **Spaces** holds the following selection steps:

Spaces

You can view details of the space via data view or the floor in CAD integrator view:



When a floor is created and linked to a property, spaces can be imported via the Cad Import (see CAD Integration). Advised for all Edition customers is to have the CAD Drawing be the source of all spaces that need to be in the application.

When spaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On space level, the following is possible:

- Add, change Space number (Advise not to do so if CAD drawing is the source)
- Add, change name
- Upload an image related to the space
- · Finishings, e.g. Floor-, Wall- and Ceiling finishes
- Actions available:
- Generate a QR code



- Go to: These are steps that lead you to another table with specific data related to the selected space.
 - Bookable unit
 - Measurement point
 - Space occupants
- Add, Copy, Delete, End, Resume space (Advise not to do so if CAD drawing is the source)
- Modify space usage: When selecting this action, it will ask for a modification date. This means that the change is applicable from that date. This can be in the past, today or in the future. The following fields can be adjusted via this action:
 - Department
 - Cost center
 - Space category
 - Space type
 - Space standard
 - Space capacity

Floor attributes

When a floor is created on Floor attributes some changes can be made. After a CAD Import of a floor (creating spaces) it will also display the Drawing locations used for the import.

On Floor attributes the following is possible:

- · Change the start date of the floor.
- Add the number of Maximum capacity.
- Define the font sizes.

Workspaces

Usage

This is the area where you can change specific usage of a space (via modify within selection or one by one). For example, changing the following data fields:

- Code
- Start date
- · Give an end date
- Change net area
- Department
- Cost center
- Space category
- Space type
- Space standard
- Space capacity

Dimensions

Certain dimensions might be applicable to maintain.

- Volume (fill in manually or it is auto populated based on value Clear height.)
- Clear Hight (when added value, it automatically calculates and populates the field Volume. If there is a value in the field volume it will be overwritten)

Workspaces

You can view details of the workspace via data view or the floor in CAD integrator view:



When a space is created via the Cad Import (see CAD Integration) and workspaces are within that space, they will be created on the selection step Workspaces. Advised for all Edition customers is to have the CAD Drawing be the source of all workspaces that need to be in the application.

When workspaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On workspace level the following is possible:

- Add, change code of the workspace (Advise not to do so if CAD drawing is the source)
- Add, change name.

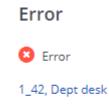
- Actions available:
 - Generate a QR code



- Go to: These are steps that lead you to another table with specific data related to the selected space.
 - Bookable unit
 - Measurement point
 - Workspace occupants
- Add, Copy, Delete, End, Resume workspace (We recommend not to do so if CAD drawing is the source)
- Modify
 - Workspace details
 - Occupancy data (only possible when related space is set to 'Assignable'.
- Make reservable
 - When made reservable a Flexible workspace (Also a reservation unit) is being created.
 - Use the 'go to' action to navigate to the related Flexible workspace

Bookings	Boolings		Decario					? WORKPLACEM	
🗇 Na Rher - cilo no acc or sho	in films			0 1	Flexible workspa			10	12
Provento E 14 C N n P D B Property Stame	+] Pear Name	\$ Secto		eties that active O	Property Four Space Tourispace	DL Branness hit affectants DL Britter VII JAK Shared office UJAK Deat Seal	0 2 0 0 2	Actions 12 Create QR code Go to	
Branne full office part	Ab foor	1.94	Destoin		Cole Nerre Intege	Call	0215	Masuramentos Ministere ener Mini	+

- Make unreservable
 - When you want to set a reservable desk to a non-reservable desk you may get this error message:



* Active reservations exist for fixed workspace 'Dept desk' via flexible workspace 'Dept desk'. Therefore, you cannot make the fixed workspace non-reservable. (RESM_E061)

When you go to the reservable desk and complete or cancel all reservations of this desk and archive them, the error does not appear again.

×

- 1. Select reservable desk
- 2. Go to Bookable unit
- 3. Navigate from reservation unit to bookings
- 4. Complete or cancel all related bookings (one by one or via action on selection)
- 5. Archive all related bookings (one by one or via action on selection)
- 6. Go back to the reservation unit / bookable unit
- 7. Go to Workspace details
- 8. Make unreservable

History

History is a table that contains data that relates to the selected record and what changes have been made in the past:

- When?
- By whom?
- Related record
- What field has been changed?
- Old value
- New value

Occupancies

When a space is assignable you can assign people to the space or to a workspace. The following fields can be populated:

- Space
- Workspace (when workspace is filled in the space will automatically be populated with the related space of the selected workspace).
- Start date.

- Proposed end date (when no end date, it will be assigned until a date has been given)
- Owner (employee from the personnel list)
- Position (Auto populated when data is linked to person in Personnel table)
- Required area (Auto populated when data is linked to person in Personnel table)
- Department (Auto populated when data is linked to person in Personnel table)
- Cost center (Auto populated when data is linked to person in Personnel table)
- Occupancy rate (by default 100 but can be changed)
- Define which day is a working day.
 - by default, Monday to Friday = working day
 - by default, Saturday and Sunday = non-working day

Usage

Also known as the Workspace details. Here you can change the following fields:

- Space
- Available area
- Start date
- Department
- Cost center
- Workspace type (base data
- Capacity (multiply by 100)
 - When capacity of desk is 1 person populate field with 100
 - When capacity of desk is 4 persons populate field with 400

Actions available:

- 'Go to' Personnel (navigate to the personnel record of the related person to the selected workspace occupancy).
- 'Go to' Workspace (navigate to the related workspace of the selected occupancy)
- Add, Copy, Delete

Personnel

This TSI is to set up your Personnel/contacts list and the related details.

See Properties.

Components

The selection level components have the following selection steps:

- Departments
- Employment types
- Positions
- Person types
- Organizations

All the above is detail that can be linked to a person record. The more you define in these lists, the more can linked to a person, the more details can be presented or can be reported on. For example, all the related data of a person can be auto populated when a request is made, a person is linked to a (work-)space occupancy. Reports number of personnel per department, etc.

Department

See Building Administrator.

Employment type

This is a list that holds the type of employment. It is up to the organization to define the final list. The Edition has defined a default list, which can be changed.

Code	 Employment type
Employment types (4)	
01	Remote
02	Hybrid
03	External
04	100% onsite

The Space & Reservation Manager can add, change, or delete employment types.

Positions

With positions you can define a list of positions that are applicable for the organization. Each position has the following fields:

- Code
- Position (= name)
- Required surface area
 - When a surface area is defined this will be used when a person is assigned to a space/workspace. There is a check if it will fit, for example:

Warning	×				
 Warning 					
2023-02-16					
* The Required area of the occupancy 3.25 exceeds the Available area of the workspace details, starting from (date - availability): 1/1/2022 : 2.7 (PN_A02039)					
* The requested Workspace does no requirements of 100; this exceeds th 100) starting from (date - availability)	e Capacity (multiply by				
2/16/2023 : 20 (PN_A02098)					
Proceed	Close				

Person types

A person type classifies how a person interacts with your organization's work processes. Examples of person types are internal coordinator, external contact person, supervisor, subcontractor, and so on.

You can define a maximum of 10 person types. The **Person types** selection step enables you to select the defined existing person types within your organization. You can link a person to a person type by selecting a person type in the **Person types** selection step and then selecting a person from the **Personnel** selection level.

You can also view personnel of a particular person type. To do so, select a person type from the Components selection level and then go to the Personnel selection level. The link between personnel and person types enables you to retrieve filtered pick lists in other TSIs that contain personnel of a particular person type.

This is typically used in work order management. When a request or work order is to be linked to an Internal coordinator you can choose from a list (personnel list). This list can, based on the linked person type to a person, filter on person type internal coordinator:

Order assignment	
Internal coordinator	

The list of all internal coordinators is presented: When you deselect the person type filter, all personnel will be presented.

Cook # Carceling		in the second				A CONTRACTOR OF		
		1 Cards	F Cardens		# Search.			= + Q
Para	ton type imemail blands	netor						
	Code	Futiente	Perstmane	Prove number	Cast cartar Cola	Consumer Name	Property Property code	Property
-		(marries () prim	100	+1016483-6812	010000	Corporate Real Estate		Burne
1	10	Massiey, M Saturh	Sarah	+1(408)775-2076	060000	Salar & Marketing	10 U	Bairnia
1	100	Hughet Hitro	\$rc	+31 667664718	010000	France		yout
4	123	Sobrean J Lina	104	+21.616.602050	040000	87	- 11	wwt
1	102	Harmon, H Brianna	Bianta	+31 667938726	010000	France	08	With
1	128	10445 10 Teddi	7468	+31 625423606	090000	Corporate Real Bases	48	www.
1	104	West William	1 hat	-21 633066175	010100	Control & Accounting	- 11	WHE
1	105	Levis Littlan	Willen	+31448115982	090000	Corporate Real Batera		WWE
5	104	Hall H Tria	fre.	+31 6340328313	960000	Saled & Marketing	48	wind
	107	Roberts, R.Alyroa	Alysta	+01468641291	010000	Finance		winit.
4	128	Johnson J Karen	Grat	+01670064621	290000	Corporate Real Estate	48	west.

Organizations

This table is to set up a list of all the 3rd party companies, e.g. caterer, service providers, technicians, etc. It can be seen as your vendor address list.

Here you can:

- Add
- Copy
- Delete
- Change
- Archive

The following layout is available:

	s Audit info	
General		
Code		
Address type		
Category		
User-defined status	CO10. Active	8 8
Address data		
Name		
Postal address		
House number		
ZIP code		
City		
Region/County		
Country		C
District Court		
Phone number		
Email address (general)		
Website URL		
Financial data		
Debit number		
Credit number		
Chamber of commerce no.		
Tax number		
Exemption Request		
Blocking		

Address type (fixed list of 10 types, works equal as the Person type list)

Address types

×

- Property management
 Customer
 Supplier
 Consultancy
 Authorities
 Utilities
 External coordinator
 Approved contractor
 Subcontractor
- Category (pick list to be maintained in Base data (space) > Property pick lists > ADRSOORT
- City (List)
- Country (list)
- Exemption Request (Y/N list)

• Blocking (Y/N list)

Personnel

This table holds all persons (Internal and External) that are created. This list can be created manually, via a bulk import or via an AD interface. The following layout is available:

General Audit info						
Code	1					
Person type						
Personal data						
First name	John					
Sumame	Jimenez					
Full name	Jimenez, J John					
Title	Dr.					
Initials	J					
Alias						
Image				이라보는		
Contact details						
Phone number +1(216)481-6812						
Mobile phone number	+1(216)481-6812					
Email	john.jimenez@planon.com					
Fax						
Card number						
Main enterprise						
Organization						
Location details						
Property 01, Braintree hill office park				8 8		
Space						
Occupancy assignments						
Space.Floor.Property.Name A Neighbor	hood.Code	Neighborhood.Name	Space.Space number	Space.Nar		
Braintree hill office park			V1_2428	Shared of		
Hide workspace location in app?	C Yes		O No			
Position						
Position	16, Project manager	8 8				
Department	09, Corporate Real Est	8 8				
Cost center	090000, Corporate Rei	8 8				
Employment type	02, Hybrid	8 8				
Tariff group	04, \$120 per hour			8 8		
Employment status						
User-defined status	PE10, Active			8		
Start date	1/1/2022					
End date				#		

Important fields to mention:

- Person type (choose from the list. This helps filtering the list of certain person types, for example the Internal Coordinator)
- Main enterprise (when the person is an external)
- Organization (when the person is an external)
- Property (the main location where the person is allocated to)

- Space (can be filled in from the list. Will be overwritten when person is assigned to space/workspace at 'Occupancy'
- Occupancy assignments (this is an overview of the assigned location of this person)
- Hide workspace location in app? (This is by default no, if Yes, then on the App colleagues are able to see where the persons (work-)space is located)
- Position (choose from list)
- Department (choose from list)
- Cost center (choose from list)
- Employment type (choose from list)
- Tariff group (choose from list), see Service Desk user group > Base data (Front desk) > Tariff groups)
- Start date (Start date of employment)

Details

The Selection level details has the following selection steps:

- Visitors
- History
- Occupancy

Visitors

In this selection step Visitors, it is possible to add a visitor or add a visitor to an existing reservation. When creating a visitor, the following layout is applicable:

General Audit info		
General		
Name visitor	Bart	
Organization		
Name internal visitor		
External visitor		
Outlook appointment		
E-mail		
Visitor for		
Person	44, Bradley, B Elizabeth	1
Property	01, Braintree hill office park	8
Meeting		
Anticipated visiting hours		
 Visiting date 	11/4/2022	曲
Expected arrival time	10:00	
Expected time of departure	13:00	
Visit data		
 Visitor status 	Registered	i
Actual time of arrival		
Actual time of departure		

- Name internal visitor (person from the personnel list)
- External Visitor (create external visitor or select external visitor)
- Each visitor can be created in a list so the details can be used for future references.
- When selecting an external visitor from the list the name of the visitor will be auto populated (<last name>, <first name>

First name	Contains	Search	0 (× (+)
ist name assen	General First name Last name Email Mobile phone number Phone number Organization Comment	Pietje Klassen 2000 characters remaining (2000 maximum)	External visitor + Add Copy X Delete Report Report
			Gancel Save

- Meeting (auto populated when adding visitor to reservation (reservation to be chosen before creating visitor).
- Actual time of arrival (auto populated with the time based on status change to **Arrived**.
- Actual time of departure (auto populated with the time based on status change to **Departed**.
- Workflow Visitor:

3, Departed	
a, ocporteo	1, Registered
	
• 4, Canceled	2, Arrived

History

History is a table that contains data that relates to the selected record and what changes have been made in the past:

- When?
- By whom?
- Related record
- What field has been changed?
- Old value
- New value

Occupancy

See Occupancies.

Mapping options

As a space manager, you can modify existing mapping settings or create new mapping settings for spaces in the 'Mapping options' TSI and make them available to the CAD Integrator user.

- 1. Go to the Mapping settings TSI.
- 2. On the action panel, click Add CAD mapping settings space / workspace.

3. In the data panel, complete the relevant fields.

- By default, use mapping settings field is set to **Yes**. If you select No, the user settings in the CAD Integrator settings will be applied.
- Only if the Use mapping settings field is set to Yes and the newly created CAD mapping is selected in CAD Integrator, will the selection in the new settings be applied. In all other cases, the user settings are applied by default. An exception to this rule is the color-based fields (Title color, Background color, Background color text points, Legend color and Highlighting color) in CAD Integrator settings. These settings will be applied to all space mappings.

4. Click Save.

You have created a CAD Integrator mapping for spaces.

There is a list already available as default in Edition:

CAD	mapping	settini	rs (base)	(23)
000	comb house	sernis	22 (Date)	(42)

Cost centers	SPACE_COST_CENTER
Departments	SPACE_DEPT
Departments (occupancy)	WORKSPACE_OCC_DEPT
Departments (workspace details)	WORKSPACE_DEPT
Departments Level 1	WORKSPACE_DEPT_LVL_1
Departments Level 2	WORKSPACE_DEPT_LVL_2
Departments Level 3	WORKSPACE_DEPT_LVL_3
Departments Level 4	WORKSPACE_DEPT_LVL_4
Level 1	SPACE_DEPT_LVL_1
Level 2	SPACE_DEPT_LVL_2
Level 3	SPACE_DEPT_LVL_3
Level 4	SPACE_DEPT_LVL_4
Occupancies Level 1	WORKSPACE_OCC_DEPT_LVL_1
Occupancies Level 2	WORKSPACE_OCC_DEPT_LVL_2
Occupancies Level 3	WORKSPACE_OCC_DEPT_LVL_3
Occupancies Level 4	WORKSPACE_OCC_DEPT_LVL_4
Space availability	SPACE_AVL_WS
Space categories	SPACE_CATEGORY
Space occupancy	SPACE_SPACE_OCCUPANCY
Space standards	SPACE_STANDARD
Space types	SPACE_TYPES
Workspace availability	WORKSPACE_WS_AVL
Workspace type	WORKSPACE_TYPES

Example - Department space mapping



_	Departments	Net area(m ²)	Count
	01,Finance	177.90	12
	02,Human Resources	96.42	4
	04,ICT	42.20	3
	06,Sales & Marketing	215.02	9
	09,Corporate Real Estate	54.39	2
	10,Facility Management	4.18	1
	Total	590.11	31

Sensor monitoring

Sensor management

Profiles & targets

Sensor management

Sensor management is the place where all sensor related data and connections are set up, maintained, and stored.

See Properties.

Locations

The selection level Locations gives the user the possibility, to filter on:

- Spaces
- Reservation units
- Workspaces
- Floors

From these lists you can navigate directly to the related measurement points*. Per selection step the user can use additional filters to get specific results, for example, show all spaces where space category is 'office'.

*Only the measurement points that are linked to the specific location are presented when you navigate to a sublevel.

The example below is a space, which is also a space on the 4th floor. But when you filter on floors and navigate down this will not be presented after navigating down. The measurement point is linked to a specific location type.

Location	
Property	
Floor	
Space	IAQ1_3, Shared office
Workspace	
Reservation unit	

When a selection is made based on filters the user can go directly to the Selection level 'Measurement points' or use the 'Go to' action Measurement points.

Go to	^
A Measurement points	

The AWM component that drives the data exchange and data processing. On the Data engine level, you* can specify the polling interval.

The connector communicates with the sensoring system to retrieve the occupancy data for a selected set of locations. There are two methods available for retrieving data: pull- or push strategy.

*The User group Building Admin can make changes to the Data Engine polling interval.

Connectors

The AWM connector configures the sensoring system API or Platform app in Planon.

Connectors can be made available for different types of sensoring systems.

If the sensoring system publish the Planon (REST) API, a 'Planon managed connector' must be added manually.

If an AWM Platform app is used, a 'custom managed connector' is required. (Most of the AWM Platform apps will add this connector type automatically).

A connector has different statuses that indicate whether it is available for Planon Software Suite. These statuses must be set manually.

The following list is an overview of the available connector statuses:

Status	Description
Active	In this status, the data engine system connects to the sensoring system.
Inactive	In this status, the data engine does not connect to the sensoring system. This is the default status (manually set).
Immeasurable	This status is assigned if the connector has a connection problem (system set).
	If a connection with the API fails, the Connector will retry polling twice. If this still fails, the status is set to immeasurable. This rules out unrelated temporary disturbances such as internet connection issues.
	When this happens, the administrators (email list) are notified about this issue.

The connectors can be created but is normally done by a Planon consultant. Most of the Connectors work in relation to the Connector apps. Within Editions only the Solution Center is allowed to set this up.

The Power users can make changes -not advised- or go to this location to check the status of the connector.

The Configurations & logging level contains three steps:

- Definitions
- Measurement point types
- Event logs

Definitions step

Field	Description
Code	Enter a code for the measurement point definition.
Name	Enter a description for the measurement point definition.

	Description
Connector	Select a connector from the list to which the measurement point definition should be linked.
Dimension	The unit of occupancy. Currently, the default value is always PP, Per person .
Comment	Enter notes (optional). The notes that you enter will be visible to the Planon administrator only.
Pre-reservation time (min)	Specify a time in minutes that denotes the pre-reservation time. Here, the status of the reservation unit is changed to 'Reservation imminent' before the start of actual reservation time.
	The purpose of this setting is to ensure that the location is not claimed shortly before a reservation starts.
Allowed delay reservation time	Specify a time in minutes that denotes the allowed delay in reservation time.
	During this time window, the location remains unavailable for reservation even though the reservation unit may be vacant.
	After the delay time has passed and the location remains vacant, the reservation status will be updated to 'No show'.
Start break 1-3	Specify the break start times (1-3).
	When idle time is detected and this coincides with a predefined break, the idle time is extended until the end of the break.
End break 1-3	Specify the break end times (1-3).
Idle time - no valid reservation (min)	Specify a time in minutes that denotes the idle time when temporarily leaving an un-reserved location. The location remains unavailable during the time frame specified.
Idle time - valid reservation (min)	Specify a time in minutes that denotes the idle time when temporarily leaving

_

Field Description a reserved location. The location remains unavailable during the time frame specified Check no-show events If this value is set to Yes for all measurement points linked to reservation units, AWM will check for no-show events and will carry out the configured actions. Change reservation end time (no-If set to **Yes**, the reservation end time will be changed to the time of the noshow event) show event if the following conditions apply: • A no-show event occurs Checking for no-• show events has been enabled In addition, the status of the reservation is changed to the configured status. If set to No, only the status will be changed. Check early departure events If this value is set to **Yes** for all measurement points linked to reservation units, AWM will check for early departure events and will carry out the configured actions. Change reservation end time (early If set to Yes, the reservation end time departure event) will be changed to the time of the early departure event if the following conditions apply: An early ٠ departure event occurs Checking for early departure events has been enabled In addition, the status of the reservation is changed to the configured status. If set to No, only the status will be

changed.

Field	Description
No-show statuses	This field lists the status that is assigned when a no-show event occurs.
Early departure statuses	This field lists the early departure status(es) linked to the definition.
No-check statuses	This field lists the status(es) in which the location should not be checked for reservation events.
Email address for notification*	When set to Yes , an email will be sent to the members of the Email address(es) (AlertEmailList) if the measurement point/connector is set to <i>Immeasurable</i> .
Email address(es)	Enter the email address of the person(s) who should receive an email alert when the measurement point definition is set to Immeasurable.
	To enter multiple email addresses, use a comma (,) or semi-colon (;) as separator.
	If this field is empty, the Connector's Email address(es) will be used instead. If both fields are empty, no notification can be sent at all.

Measurement point types

Using measurement point types is optional. This feature can be used for being able to filter on specific types of measurement points in the AWM Dashboard, such as: meeting rooms vs. conference rooms.

Field	Description
Code	Enter a code for the measurement point type.
Name	Enter a description for the measurement point type.

Event logs

• Note that events logged here are issues that are reported on the connector, not on the measurement point!

•	The log also displays useful information about the current and next
	polling cycle, the number of measurement points, and more.

Field	Description
Application log type	Displays the type of information that is logged:
	• Error
	Warning
	Information
Source	Displays the process causing the event.
Log message	Provides an overview of the event, if possible.
Details	Displays log details.
User	Displays the name of the user on whose name the process is executed.
Transferred to archive?	Indicates whether this log message is archived.

Measurement points

A representation of a location for which you want to measure and maintain occupancy data and, if applicable, environmental values. AWM only process locations to which a measurement point is linked.

Measurement points can be linked to any of the locations defined in Planon. A location can be a space, a reservation unit, a workspace, a property, or a floor.

A measurement point can have an Inactive or Active status, and these can be set manually. AWM only processes measurement points in the Active status.

The Planon application does not process data of individual sensors, but it expects the Sensoring system to accumulate this data on location level. Therefore, a measurement point in the Planon application represents a location and not an individual sensor.

There are three types of measurement point fields:

- Read only: these are system fields that are filled by the data engine.
- Configuration items: the values of these fields can only be edited when the measurement point is Inactive.
- Free changeable fields, which do not affect the processing of data.

The selection level has two selections step regarding readings:

- Readings: This is the list of every single reading that is recorded on a Measurement point
- Hourly summarized readings: Each night, all readings are summarized to hourly summarized readings.

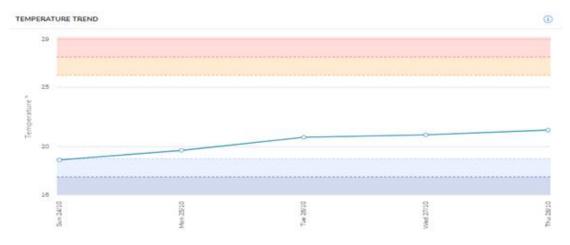
The latest reading is updating the data on the Measurement point (Live data).

With the hourly summarized readings, the system is able to create the historical data / dashboards.

Profiles & targets

Enviro	proten Environmental						taday 🗎
C No fiter				0.7	General Auditient	e	
Code	# Comains	1 Seath.		O Q			
0					General		
	+ [Name	10	lefoun?		· Code	INSIGHTS.	
Lote		150	HALIN'		· Norme	Insights profile for deep	dive charts
Cenvironmental	profiles(1)				· Default?	O fee	O Ne
INSCRITS	Frights profit	in fair cloney altern chants.	2		Boundary for (couparky		
					· Undercepacity	50	
					· Comfart score boundary	100	

Environmental Dashboards can show Environmental Targets (Boundaries), for example below:



The colors define the low and high targets on Environmental values. These targets can be set on Profiles & targets TSI.

An Environmental Profile is predefined in the accelerator. Profile with a set of Environmental Targets. This Profile is set to Default. There can only be one Default. On the Profile you can set:

Undercapacity

(used in Utilization Dashboards).

Define with Customer what their Undercapacity boundary is. For example: Undercapacity is set to 50.

When a space has a max capacity of 10 people and there are < 5 people counted in the space (by sensor) the space is "Underutilized".

When there are 5 to 10 people counted it is "In range". When the count exceeds 10 people, it is "Overutilized".



The Comfort Score Boundary

(used in Environmental Dashboards).

Define the customer's Comfort score boundary. For example: the total score of the comfort score is acceptable when 85. When the comfort score is < 85, the Bulb will be red.

OMFORT SCOP	RE				(
		£*	Temperature	100	
02.2	Pulses and the second	6	COr	100	
83.3	Below acceptable range	0	Humidity	50	
		050	VOCs	-	

When the comfort score is => 85 the Bulb will be green.

OMFORT SCORE					0
		8.	Temperature	100	
89.8 Within acceptable range		0	CO2	86.5	
		٥	Humidity	83	
		85	VOCs	-	

Target values

Per Profile a set of Environmental Targets can be set. There is already a predefined set available for the most important (shown in Dashboards) Environmental Targets.

Environmental profile.Code	Environmental profile.Name	Measurement point fiel High	~ Low	Margin	1
Target values (9)					
INSIGHTS	Insights profile for deep dive cha	Flow in			
INSIGHTS	Insights profile for deep dive cha	Flow out			
INSIGHTS	Insights profile for deep dive cha	Temperature	25	18	0
INSIGHTS	Insights profile for deep dive cha	Humidity (%)	70	40	10
INSIGHTS	Insights profile for deep dive cha	Sound	75	40	
INSIGHTS	Insights profile for deep dive cha	Light	100	0	
INSIGHTS	Insights profile for deep dive cha	VOCs	200	50	25
INSIGHTS	Insights profile for deep dive cha	Radon	400	0	25
INSIGHTS	Insights profile for deep dive cha	Carbon dioxide (CO2)	750	350	10

General Audit info	
General	
 Environmental profile 	INSIGHTS, Insights profile for deep dive charts
 Measurement point field 	Temperature
High	24
Low	18
Margin	1

These targets also define the range coloring on the floorplan, Bulb view with the values within range or not and Environmental values over time. Below example is on Temperature Value:

suparicy Plane Utilia	pation (Humanian)							• Day -+	1 Ser 25 Decem	Sec. 2001
<u>r</u> = 0	0.0.0			TEMPERATURE						
IELECTION DETAILS			iD.							
100 10204 746 11 1	telesconti (prote B1	Article and a second se		20.9 *	Week within acces	ptatus lange				
LOOR PLAN			2.0		1.575.1					
feronizione pri st	21 • Sector			TEMPERATURE OVE	A THE					
	L PERSONTS I	TTO STO								
		8 8 8								
				3						
				1			 			
				· #						
	Con all and	6 6								
	COLO DE	121								

Moves

Moves is a TSI that is designed to deal with regular moves of personnel.

A move starts with a move request including several move lines, which is directly added by an employee in **Moves** or via **Web Configuration**.

After assessment and approval of this move request, for example by a department manager, the request is passed on to the person who oversees the company's moves.

This person creates move orders for all personnel and assets that need to move.

By combining the move lines of one or more move requests and by assigning them to move orders, the move can be planned efficiently.

Moves

Personnel

Persons who are registered in the Personnel TSI.

Data on personnel includes information on a person's current space, workspace, department or cost center. If a person is moving to another space or building, a move request with move lines can be added in **Moves** which can be linked to this person. This person's move lines can subsequently be combined into move orders.

Move capacity

Building managers either employ internal staff to help with the relocation of people or they may hire external contractors. In any case, each property will have a maximum number of personnel that can be moved by the available relocation staff on a specific date.

In Planon, this is called **Move capacity**, a feature that allows you to specify and verify the available move capacity for a property / campus on a particular date and plan any moves accordingly.

In the **Move settings** TSI, you can enable a setting that takes the move capacity into account when adding move lines. For personnel move lines you can also specify from which property the capacity needs to be deducted in move capacity calculations.

Adding a move capacity record for a property

You can decide whether you want to consider the move capacity of a building when moving personnel. Move capacity is a property's maximum number of personnel that can be moved on a specific date.

- 1. Go to Components > Move capacity.
- 2. Click Add on the action panel.
- In the dialog box that appears, select the Property for which you want to add the move capacity and click OK.
- 4. In the data section, complete the relevant fields.
- 5. Click Save.
- 6. The Move capacity is added for the property on the specified date.
 - If there is no capacity specified for a property on a certain date, Planon will check the capacity of the main property and the capacity will be deducted from the main property accordingly.
 - The move capacity is updated based on the move lines added on the specified date. The used capacity and available capacity fields are also modified accordingly.
 - Any move capacity related warnings and errors are displayed only if the field Take capacity into account? is enabled in the Move settings TSI.
 - If a move order is generated from a move request's move line, the move line will be considered only once with regard to the move capacity.

Specifying move capacity via Move capacity wizard

If you want to specify the move capacity for a property, on multiple dates, it would be very time consuming to add the capacity details for each date. In that case, the Move capacity wizard enables you to create multiple capacity records for a property. In the Move capacity wizard, you can specify the move frequency, start-end date, and number of occurrences.

- 1. In the **Moves** TSI, go to the **Components** selection level and select the **Move capacity** step.
- 2. Click Create capacity via wizard on the action panel.
- 3. In the **Move Capacity Wizard** that appears, complete the relevant fields.
- 4. After completing the fields, click **OK**.

A warning is displayed that existing capacity records on the specified dates will be overwritten with the new capacity record. This overwriting process will run as a background action and will be logged in the log files.

Move capacity records are added for the selected property on the chosen dates.

Moves

This table gives a total overview of all:

- Move requests
- Move orders
- Orders

Move type	Description
Move request	A move request can be submitted when it is required that personnel move to a different location.
	Staff that is authorized to do so can create move requests in Planon ProCenter > Moves. Employees can also use the Self-Service Move request wizard to request a move. Move lines are added to the request, containing all the essential details on the move. After approval by a manager (status Approved), the move lines can be assigned to a standard move order.
Move order	Move orders are added by personnel who are responsible for planning moves. A move order can have suborders, but it cannot be a suborder itself.
	Move orders are added by authorized Planon ProCenter users at Move orders & requests.
	Move orders that are based on standard move orders can be used to combine the move lines of various move requests into a single move order. For this purpose, there is a special wizard available at Details.
	The whole move process can be monitored by means of status transitions. A move order and its move lines contain all the essential details for the move (dates, times, costs etc.).
Standard move request	A standard move request is a per-configured 'template that you can use to speed up the creation of move requests in the system.
	Users can apply standard move requests in Moves, after which a significant amount of move request data is automatically entered that would otherwise have to be entered manually.
Standard move order	A 'template' move order that can be used to speed up entering new move orders in Planon.
	Users can apply standard move orders in Moves, after which a significant amount of move order data is automatically entered that would otherwise have to be entered manually.

If you are planning a move for employee(s) within your organization, you must first create move lines for them, one line for each employee.

Move lines - personnel include details such as:

- · the date-time of the move
- the date until which the move is taking place
- the person with whom someone is going to move (if applicable)
- data on the current location of this person
- data on the new location of this person

Planon uses the selected Move date-time to check if a destination space is 'active' and available.

Typically, a move line is created to reserve / block a vacant (work)space for an employee. The employee will occupy that (work)space for a certain period in the future. The move line will prevent others from occupying it during the specified period.

Personnel move lines can be linked to both move requests and move orders. After they are planned in a move order, the move lines linked to the move request can no longer be modified, nor deleted.

However, the move lines linked to the move order can still be deleted. In that case, the move line in the request is retained.

Move settings

Move settings is a TSI where you can make various settings for the **Moves** TSI in Planon ProCenter and the **Move request wizard** in Planon Self-Service.

This section describes the various settings available in the Move settings TSI.

General move settings: settings related to the **Moves** TSI can be made on the **General** tab of the **Move settings** TSI. These settings include:

- Activation of automatic status transitions to (user-defined) move request statuses.
- Synchronization of move lines.



If no statuses are selected in the Automatic status transition to user-defined Planned statuses and Automatic status transition to user-defined Executed statuses sections, there will be no automatic status transitions for move requests.

To set automatic status transitions for move requests

Use the following procedure to set automatic status transitions for move requests to a Planned user-defined status.

- Go to Move settings > General tab.
- Under the Automatic status transition to user-defined Planned statuses section, open the Move settings - User-defined 'Planned statuses' pop-up.

The User-defined 'Planned statuses' dialog box is displayed.

- In the Available section, select the 'Planned' user-defined statuses to be assigned to move requests whose move lines have all been assigned to a move order.
- Click the right arrow button to transfer these statuses to the In use section.
- 5. Click OK.
- 6. Click Save.

You have now made status transition settings for move requests whose move lines have all been assigned to a move order.

Setting automatic status transitions for move requests

Use the following procedure to set automatic status transitions for move requests to a user-defined Executed status:

- 1. Go to Move settings > General tab.
- 2. Under the Automatic status transition to user-defined Executed statuses section, open the Move settings User-defined 'Executed statuses' pop-up.

The User-defined 'Executed statuses' dialog box is displayed.

- 3. In the Available section, select the 'Executed' user-defined statuses to be assigned to move requests whose move lines have all been completed.
- 4. Click the right arrow button to transfer these statuses to the **In use** section.
- 5. Click OK.
- 6. Click Save.

You have now made status transition settings for move requests whose move lines have all been completed.

CAD Integration

Before you can create a CAD import (see explanation later), the AutoCAD Drawings (adjusted to the CAD Drawing requirements) need to be uploaded into the CAD Inbox folder.

CAD Inbox

-PLANON-						Tosey 📓 🔺	? BALDINGADARI B
Q. Search	C Na Ner		0 1	(000000			
A Home	Default served a	4 Sarch.	000	General			File sproad -
115 General	0 8	-1		Name • Document	Drug file of Brander	4.5	. Denn
Deep Dives	EFRE uproved (1)						
12 1: Occupancy over time	OTL: Tet foor dwg						
2. Environment over the							
UP 3 Utilization over time							
ligt -4 UbRaction per weekd							
CAD integration -							
CAD shawing defensions							
4 CAD import definitions							
A CAD Inters							

- 1. Go to TSI CAD Integration > CAD inbox
- 2. Click Add
- 3. Upload a drawing (choose from a location)

Name		
Document	Drop file or Browse	1 📩 🛏

- 4. Click Save
- 5. Drawing is being uploaded in the CAD Inbox folder

When a drawing has an XREF drawing link, make sure you also upload the XREF to the same location.

Drawing definition

1

For detailed information about CAD Drawing definitions, refer to the WebHelp.

A CAD drawing definition defines the relation between the data in Planon and the information in the AutoCAD drawing. Follow these steps and detailed field explanation (minimum required) to create a correct CAD drawing definition.

Complete the following steps to create a CAD drawing definition.

Procedure

- 1. Go to TSI CAD Integration > CAD drawing definition
- 2. Click Add

General Audit info	0		
General			
• Code			
Description			
Drawing			
 CAD drawing 	Drop file or Browse		1 =
 Unit of length in drawing 	M, Meter		
 StabiCAD drawing 	O Yes	O No	
Space standard			
Area measurement stan			
Apply construction thres	() Yes	O No	

- 3. Define a code for the drawing definition (e.g., CD_BUILD).
- 4. Define a description for the drawing definition (e.g., CAD Drawing Building).
- 5. CAD Drawing: Select the drawing from the CAD Inbox. These should be uploaded as described in CAD Inbox (CAD Integration).
- 6. Define the correct Unit of length in drawing. This can be derived from the AutoCAD drawing.

Code	~ Label	1
CM	Centimeter	
FT	Foot	
IN	Inch	
м	Meter	
MM	Millimeter	

7. Click Save.

Add CAD business objects

You must specify the business objects to be imported from the CAD drawing into Planon. In addition to the business objects in Planon, you can also specify construction data such as pillars, holes and other constructional elements that need to be imported into CAD Integrator FM drawings or constructional drawings.

Procedure

- 1. Go to CAD drawing definitions > CAD business objects.
- 2. On the action panel, click Add [CAD linked ...]
- a. For Floors > CAD linked floors
- b. For Spaces > CAD linked spaces
- c. For Workspaces > CAD linked workspaces

- d. For Construction > CAD linked constructional data
- e. For Sensor zones > CAD linked spaces

CAD business objects (5) Construction data 01 01 Floors 01 Sensor zone 01 Spaces 01 Workspaces

Add CAD business object mapping

See the following example of CAD business object mapping per business objects.

1

For best UI presentation of the drawing in the dashboards, we recommend keeping the colors limited to dark grey.

Floors

Polyline classification - > 2, Gross

No field mapping required

General Audit info		
General		
 Unked business object 	Floors	
CAD layer	Planon_WPA_Fpoly	
Polyline settings		
 Polyline classification 	2. Gross	
Enclosed polylines	×1, Hole	
CAD Integrator settings		
Convert to CAD Integrator drawing	O Yes	O No
CAD Integrator color		
Display value	Planon_WPA_Fpoly, Floors	

Spaces

Polyline classification - > 1, Net Field mapping required

General Audit info		
General		
 Linked business object 	Spaces	
CAD layer	Planon_WPA_SPoly	
Polyline settings		
 Polyline classification 	1, Net	
 Enclosed polylines 	1. Space	
CAD Integrator settings		
 Convert to CAD Integrator drawing 	O Yes	() No
CAD Integrator color		
Display value	Planon_WPA_SPoly. Spaces	

Workspaces

Polyline classification - > 1, Net

Field mapping required

Work Spaces	
Planon_WPA_WPPoly	
1, Net	
1, Space	
O Yes	O No
Planon_WPA_WPPoly, Work Spaces	
	Planon_WPA_WPPoly 1. Net 1. Space Ves

Construction data

Destination CAD Integrator Drawing > **2**, **FM drawing** No field mapping required

Construction data
Planon_WPA_Floor
2, FM drawing
Planon_WPA_Floor, Construction data

Field mapping

Spaces and Workspaces do need a space number mapping and preferably a name.

CAD drawing definitions NL_NIJME_WW8, Nijmegen_		Details
CAD business object map	pping Field mapping	
🔊 No filter		े 🕇
Business object 🔹 =	Search	🖪 🛛 Q
C		
Business object.Name	▲ Field.Name	CAD layer.Description
🗊 CAD field mapping (2)		
Spaces	Space number	
Spaces	Name	

Import definitions

The following settings are important to have a seamless import based on the linked drawing and the linked Drawing definition.

CAD Import definitions

When creating a CAD import definition, follow the print screens with the correct settings. Below the print screens you will find some references of fields that are specific to the customer, such as File name, etc.

General Output options Se	eparator property-floor	Character property-floor	Audit info
General			
• Code	01		
Description	Demo - Simulator properties		
General import settings			
Create CAD metadata file?	O Yes	O No	
Global drawing definition	01, Demo - Simulator properties		8 8
 Property-floor retrieval 	1, Drawing-floor mapping		
 Effective on 	1, Start date of floor		
Date on which changes become effective	1/1/2022		苗
Allow auto-correction?	O Yes	O No	
 Import spaces (Y/N) 	O Yes	O No	
 Import workspaces 	O Yes	O No	
 Import persons (Y/N) 	1, No		
Standard move request			
 Import non-closed polylines 	O Yes	O No	
Log detail level	3, High		
Import location settings			
 File location of drawings 	CAD_Inbox		
 Include subfolders 	O Yes	O No	
 Delete input files (Y/N) 	O Yes	O No	
File name wildcard filter			
Start date for import file			曲
End date for import file			<u></u>
Last import log			-
Output location settings			
File location for output	CAD_Outbox	O No	-
 Overwrite output files (Y/N) 	O Yes	U NO	
CAD Integrator settings			
 Create CAD Integrator file 	O Yes	O No	
• Creation output folder structure CAD In	O Yes	O No	
 Update CAD Integrator FM drawing 	O Yes	O No	
Output location for CAD Integrator files	CAD_Outbox		5

- Create CAD metadata file? Set this to **Yes**. It will create an additional CAD Drawing that holds the UUID "Shared ID" which can be used for unique reference to sensor IDs.
- File name wildcard filter: this is up to the customer to define, but typically you can use the name of the drawing.

General	Output options	Separator property-floor	Character property-floor	Audit info
Folder optio	ns			
 Add month to 		O Yes	No	
• Add date to ou	utput folder	O Yes	No	
Subfolder op	otions			
 Add file as fold 	der to output subfolders	O Yes	O No	
• Add month to	output subfolders	O Yes	O No	
 Add date to out 	utput subfolders	O Yes	O No	
Name of his	tory (sub)folder			
History folder				
Enaco coocif	ic options			
Space specif	-			
Space code wi		-		
 New space size 	e or usage after data cha.	. O Yes	O No	
 Threshold new 	v space dimensions	0.1		m²
 Resume space 	s	Yes	O No	
 End spaces 		O Yes	O No	
Workspace s	settings			
Workspace co	de wildcard filter			
New workspace	e details after change	O Yes	O No	
• Workspace up	date area	O Yes	O No	
Resume works	spaces	O Yes	O No	
• End workspace	es	O Yes	O No	

Mapping between drawing & floor

Here, you will be able to select the correct drawing that is going to be imported and linked to the correct property and floor (of that building):

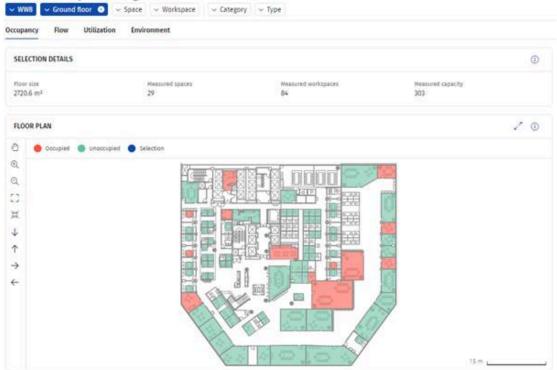
General Audit i	nfo	
General		
 CAD drawing 	WW6_Floor_0.dwg	
Property	WW6, WW6	8 8
Floor code	00, Ground Floor	8 8

Run import

When CAD Drawing definition is created and linked to the created CAD import definition. You can run verification first and when all is fine run the CAD import by clicking **Run CAD import**.

Check the logs and finally check the spaces in TSI Spaces. Check the result in the CAD Integrator view by selecting a space and viewing it in CAD Integrator. Check view on Workplace Insights > General. The drawings should appear when selecting the floor:

Planon Workplace Insights



Threshold values

Here, you can set threshold values for floors and space dimensions. These threshold values are used to determine whether new floor or space dimensions should be created automatically when new floor or space dimensions are imported via a CAD Integrator drawing.

If the set threshold values are exceeded after importing new floor or space dimensions from a drawing, new floor and space dimensions will be created in the database. If the threshold values are not exceeded, the existing floor and space dimensions will simply be overwritten.

Additionally, you can set a threshold value for the Space dimension and Space usage tolerance in the Difference tolerance - Space dimension and Space usage field. If the combined Space usage value exceeds the Space dimension value by the given threshold value, a warning is displayed. No warning is shown if the given threshold is not exceeded.

The standard settings are set to:

CAD import thresholds		
Floor size threshold	0.1	m²
 Space size threshold 	0.1	m²
Warning thresholds		
Difference tolerance - sp	0.1	m²

CAD colors & hatchings

The CAD Integrator hatch patterns TSI provides a predefined list of hatch patterns that you can apply to CAD Integrator space mapping in your drawings. You can apply hatch patterns for space mapping on the following elements:

- Departments
- Cost centers
- Space types
- · Space categories
- Tariff groups
- Space standards
- Free space attributes

You can add more hatch patterns to the list by using the Add action.

CAD Integrator coloring

0.74	Ster - chilosadd ar anais Sters			Not translated			Call International Action
		16- 1	• 1/	etan O olmati dipat tuta olmatika	124 274		 CAD integration polor n
1	814		• 0	Cor scheme		013	D Apot
:	314		0	earlyinge.			B veboz
1	134	-	- 24	NAME OF A DESCRIPTION O	3		
4	154						
\$	214						
8	234	Sec. 1					
7	252	200 million					
8	104						
1	014						
10	194						

CAD integrator hatching

CT is film-close	to add or phose filling to	0 1	General		GAD store stor hatch	
CHIN	E Service E Desite.	0 Q			+ Aut	
C			· Cole	ANE 21	Copy	
	+1 Hatchington	1.11	 Hach argin 	1	X Dente	
lothe			· Neth patient		A Desig	
CAD Integrator 7	harsh (\$7)		46.02.0.128		Report	1
MyGL8	Argu thei					
NVC/101	ANCI ITUM				B Report	
ANE DE LE CONTRACT	AND Steel					
Vidias	while Broman			alkis characters remaining (\$500 maximum)		
N3/34	Ards: Practic		· Head state	1		
NDD.	AND Fire brick		· Summ code			
v-dips.	alide triangle		Business stown type			
AND/DT	AND Land		- Bracian			
40.00	AND Auminum					
44.8214	Briti back elevation prepara.					
ABENC	Bell& Block elevation scretcher b					
122-201	and allock wavarian stretcher too			V////A		
WIRKER.	Standard brick elevation english					
A extra	Transact binds are adjust at each			V////		
a conc	Random dut and storie pattern					
A-RONE	Standard brick herringtione pats					
aland)	2x12 Parquet failing pattern of					
NOOR IN COMPLEX	Roof strings texture					
AR-RINE	Roof wood shake texture		Hatch name	ANG that		
AR-SAND	Random zot pattern		Opdate count	1 Y		

Reservations

Bookings

Bookings

This TSI is used for an overview and maintenance of the Reservation units (space and workspaces). Setting facilities, rules & policies. There is also an overview of bookings made on these units and/or desks, where possible visitors and catering can be added.

In the Edition, there are two types of reservation units:

- Space units
- Flexible workspaces

A reservation unit can be linked to a default company calendar to define its opening hours.

Space units

In Planon, any spaces that can be reserved are called space units. There is a wide variety of space units that can be registered, such as meeting rooms, conference rooms and classrooms. A space unit is always linked to a specific property. In addition, you can define facilities and desk configurations for space units. The space units that have desk configuration display the icon in the graphical planner's elements list. Refer to Facilities and Room layout.

Flexible workspaces

A workspace that is not defined as a fixed workspace, but which can be used for working is known as flexible workspace. For example, a lounge area. You can create flexible workspaces and make reservations for them.

In addition to the regular fields such as Code, Name, Property, etc. there are some important fields and action that have a functionality behind it.

- Space unit category: Here a required category can be given. See Base data (Reservations) > Reservation's pick list > Picklist: RESEENHSRT > Pick list items.
- **Facilities:** this is a list of facilities that are available in/at the reservation unit e.g., smart-board, conference phone, video camera. When facilities from the list are attached to the reservation unit the field will be automatically be set to **Yes**. If yes, you can view the attached facilities in the Information button of the field.

When facilities are linked, the end user can use the facilities field to search for units that have a certain facility in the room or at the desk.

For maintaining the Facilities list see **Base data** (Reservations) > Facilities.

• **Furniture layout:** With the furniture layout / room layout you can define what standard desk setup type it has. It defines the desk setup type e.g., Boardroom, U-shape, etc. with a possible image and the reconstruction time / costs.

See **Base data** (Reservations) >Room layout . You can define different standards per reservation unit, for example meeting room Blaze has a standard boardroom and standard U-shape desk setup type. The reconstruction times are different.

- No. of advance reservation days: Here you can define how many days in advance this room might be booked. For example, 14 days.
- **Max. reservation duration:** Here can be defined for how long you can book this unit. Typically for reservation units this is max 1 day.
- **Transition period (mins):** This is the time it takes to transform the space unit between 2 meetings. For example, desk set-up or cleaning and delivery catering.
- Link non-bookable period: In some cases, a space unit or flexible workspace can't be booked because of renovation, special event, etc. Non-bookable periods can be defined and be linked to the unit. For creating non-bookable periods see Base data (Reservations) > Nonbookable periods.

Bookings

At the selection level Bookings, you can create, modify, and maintain bookings on space units and flexible workspaces.

The reservations can be presented in a list view:

No filter - click to app or phow filters 💿 🍸	General Commilog	Cotts Audit info		1 E)
urber 1 Content 1 Sect. O Q				> Book space
NAB	Requestor		10000	
Contraction of the second s	Recentor	157, Williams, St Andrew	0 🙂	+ A00 ~
Orden	internally assigned by		<u>C</u>	14 ADE 340 -
E 64867 00. 8/24/2022 09/00	Department	01. Rinance	0 (*	🎝 Add Haltons
S4886.00.8/24/2028 09:00	Approver			Copy
E4048.00 8/04/0028 08/00	To be approved by			X Delete
64864.00. 8/04/2023 09:00				C Mala recurrent
E + 44043.00 8/24/2023 09:00	Reservation data			Add commilling
E44842.00, 8/24/2023 09:00	Diandant or dw			M Transfer to anthive
E4061.00. 8/24/2023 09:00	Description			2 Aprestutente
. 6.4960.00, 8/24/2023 08/00	Number	64967.00		
E 54464 00. 8/04/2020 09/00	· Start date & time	R 8/34/2028 08:00	8	Status transitions
SAME 00. 8/24/2028 09:00	· End data & sime	B #2#2023 17:00	8	X Canteried
E = \$4442.00, 8/34/2023 0H00	Number of people	1		O No show
54481.00, 8724/2020 08:00	Selected desk configuration			Early departure
E MARC.00. 8/24/2028 09:00	Recurrence proup			 No check
. SAUDRION, B-20/2022 09:00	Further (primeria			Company .
File Sauka co. 8/24/2025 09:00				2 Show from diagram
F = SALET.00. 8/34/3022 09:00				

or in the graphical planner:

Bookin		lassings		Deta	-14																		5ode	6 8)(*		?	Web	DRKPL	ACEM	58	(94)
Special and a	Δ Assecure	n ñr teach	e workspas																									1			Ð	
🗁 ha filar - cisk ta i	• • T	0 *	<) No fite	r - 1104	10 add or	• 0	T	Q																	ŝ	•		2		1	1	2
ode & description	Desi in	Capacity	Theat																													
			08.00				10:00			17.00				2,00			13:00			1400			16:00				600			17.0		
1205.Jerus		4.	0 40	00 1	\$ 30	45 Q	18	30	4	00. 5	1 30	1 45	00	15	30 4	5	00 15	30 4	8	00 18	30 4	45	00 11	\$ 30	4	00	a	30	45	00		0 4
1206. Kulper		1.																			20										1	
1207. Let		410																			_					1	10	4043	a		ï	
1208. Mercary		44											t		041110	10					100		1			-					ï	
1208 Oberon		A16								20	l en	111.00				1															ĩ	
1213 Perseus		4 10											-																		1	
1214. Rgel		\$ 20			i ataata																										1	
1215 Sirlue		A 14					-	1											1		E.	•									1	
(214.7aurus)		4.4	-		40408	_																									ĩ	
1103. Bace		4.10																													ĩ	
106. Bre		4.	1																												ï	

Points of interest on bookings:

- Set default filters available e.g., Today's reservations.
- Add sub order to reservations e.g., catering orders.
- Add visitors to the reservations.
- Make recurrent.
- Change statuses.

Booking analytics

Desk booking stats

Desk utilization

Room booking stats

Room utilization

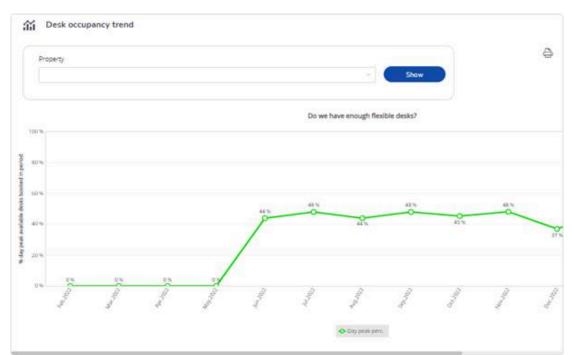
Desk booking stats

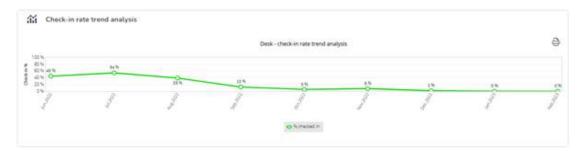
This page shows a set of desk related booking stats. See below a part of the dashboards available.

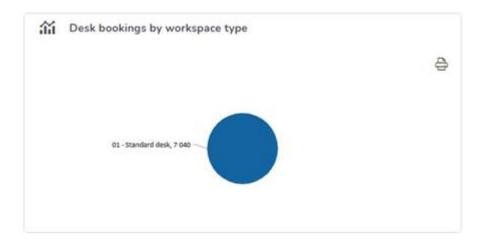
On top of the page there is a possibility to filter e.g., date, property, floor, department which will be applied on all dashboards.

In some dashboards you can zoom in for more details.









Desk utilization

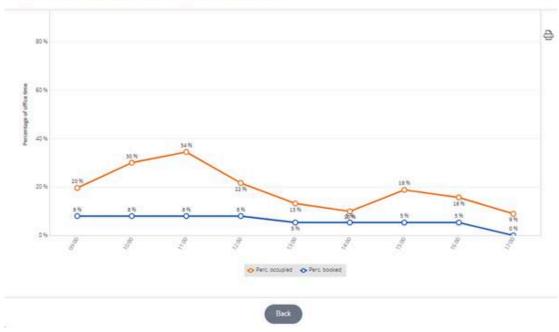
This page shows a set of desk related booking utilization dashboards. See below a part of the dashboards available.

On top of the page there is a possibility to filter e.g., date, property, floor, department which will be applied on all dashboards.

In some dashboards you can zoom in for more details.







Room booking stats

This page shows a set of room related booking stats. See below a part of the dashboards available.

On top of the page there is a possibility to filter e.g., date, property, floor, department which will be applied on all dashboards.

In some dashboards you can zoom in for more details.







Room utilization

This page shows a set of room related booking utilization dashboards. See below a part of the dashboards available.

On top of the page there is a possibility to filter e.g., date, property, floor, department which will be applied on all dashboards.

In some dashboards you can zoom in for more details.



Space data (space)

In this navigation group you will find a set of navigation center items that hold base data related to spaces.

Cities

Property pick lists

Space pick lists

Workspace types

Calendars

Large organizations and multinationals usually consist of multiple subsidiaries and regional branches. This can give rise to a great diversity in working days and opening and closing hours within the organization. Even within a single office building, the various reservable units may have different opening and closing times. This constitutes a challenge for the facilities management department that wants to implement and enforce company-wide rules for opening hours or cleaning hours.

You can configure as many calendars as required in the **Calendars** TSI. Since a calendar is a hierarchical business object, you can add multiple sub calendars to every main calendar. At level 2 of the hierarchy (the first sublevel), you only need to enter data that deviate from level 1. The same applies to calendars at level 3 (the second sublevel), which will inherit their data from level 2, etc.

You can link different calendars (or one of their sub calendars) to different business objects, such as properties and reservation units (space units and asset units). The dates and times of any orders you may add will be matched against the calendar that is linked to the reservation unit or to the property that is filled in on the order. If there are no calendars linked to the order's reservation unit or property, they will be matched against the default calendar.

Calendars			Teeley	? WORKPLACENG	1
Calendary Special dates Deviating hours					
Circles fine - click to edd or show finers	General Audit in	6		Celenders	2
Code # Conserve # Swinch. O Q				+ 400	
0 =	• Caros	21		It Add to the	
	 Cose group 	01		X Delete	
Ba Calendaria	Name	Company Calendar		Cupy	
01. Company Calendar	TopJavai			Copy	
02, People Rox Calendar	General working hours			Report	~
COOR, Default Calendar	General start time	09:00		D Report	
	General end time	17:90			
	Type of day				
	Monday	Working day	*		
	Tuesday	Incruing day	~		
	(Viednesday)	Working day	~		
	Thursday	Working day	~		
	#riday	incruing day	~		
	Security	han-variing day	~		
	Sunday	Non-working day	~		

Cities

End users can use the Cities pick list, for example, to specify the city where a property is located, or to specify the city for an address.

Cities						Today 📓 🌲	7 WORKPLACE	MGR
D No filter - pie	ik to add or show fitters		0 1	General			Cos	20
Cey	1 Contains 1	lainn	O Q	- HILLING CONT			+ A00	-
0 8				General Courtery			Ctoy	
	111			Country	NL Netherlands	0 (3	× Determ	
Cry D Croes (t)	+ Municipality	15		* City	Nimegen		0.00	
				Municipality	Gelderland		Report	83
Braintree				ReportCounty	Gelderland			
Auger augers	Gelderland			District			E faport	
Singadore								

Property pick lists

This list is to define the address categories. The list is used in the field Category: **Personnel > Components > Organization**.

ETAGECODE

This is to list the floors. There is an affixed list up to 50 floors. If more are required, they can be added here.

This is a list that can be used for defining the type of location, e.g., hospital, warehouse, office, etc.

OWNERSHIPTYPE

This is a list that can be used to define if a building is leased, owned, partly owned, etc. This list is used in the field Ownership: **Space & workspaces > Properties**.

Space pick lists

This is a list that can be used to set the different types of sensors, e.g., area counting, indoor air quality, etc..

This list is used in the link Space Sensor type: **Spaces & workspaces > Spaces**

Workspace types

In this table you can define the different types of Workspaces e.g., standard desk, team desk, flex desk, etc..

This list is used in the field Workspace type: **Spaces & workspaces > Workspaces**.

Base data (reservations)

In this Navigation group you will find a set of Navigation center items that hold base data related to spaces.

Desk setup types

Facilities

Non-bookable periods

Reservation pick lists

Room layout

Desk setup types

In this list, you can define a list of possible desk setups e.g., Boardroom, U-shape etc..

These setups can be used when setting up Room layouts.

Facilities

Here a list of facilities can be created to be linked to a reservation unit (space/desk). You cannot add facilities, but renaming is possible. There are 50 facilities possible. There is a set already defined in Edition. The other facilities can be used (by renaming) by the customer.

Per facility, you can define if the facility is available in the picklist facilities at the Space units / Flexible workspaces TSIs.

If the facility is only for meeting rooms, you can define this by setting the field to Yes.

Non-bookable periods

Meeting rooms are available in accordance to the connected calendars. The working days and the opening hours set in the calendar are the periods that a meeting room is bookable. Deviating days and times, if set in the calendar, are also considered.

With non-bookable periods you can define a list of periods when a meeting room is not bookable, for example special holidays (which can also be done in the calendar), but also renovation periods and special events.

When there are non-bookable periods defined, you can link them to reservation units. This can be done directly on the non-bookable period record, or on the space unit or flexible workspace.

Reservation pick lists

In this pick list you can define the different space unit categories, e.g., meeting room, conference room, board room, classroom, etc..

These can be used for filtering when linked to a space unit.

Room layout

Room layouts (or Desk configurations) can be created here directly linked to a space unit. Here you set up the following:

- Reservation unit (you can choose from the reservation units available)
- Set up of the room (List Desk setup type)
- Code and description
- Image
- · Reconstruction time and costs

Per reservation unit you can define multiple Room layouts with their specific details.

My alerts

If there are any alerts created and linked to you as a user, you can find the alerts here. When there is an alert in your screen (top right) you can click on the alarm bell, and you will be redirected to **My alerts**.

My alerts				5	clay 🛗 🛛 🧍	? WORKPLACEMO	4. W
I foo filter - choir to add or all-our filters	0.7	General					
Cool 1 Contains 1 Search.	Q	General	-1-			 Alarm statuses Show results 	~
1-1 Promy 8. 5. 5. Code	(Description	Cook Description	M linee			Report B Report	
() Alem matures (1)	1	· Persent	C. Yes	O teo			
12 1 12 W AD ADDAR	7	• Ringing	0 141	(C.967			
		· Shoose	C Yes	0 No			
		Snooped until Aart condition	An Manuartan a	and a summary still	8		
		bille rum, d'elements	77				

When there is an alert, you can see or do the following:

- You can view the alert (code and description)
- You can forward this alert and define to whom you want to forward it to.
- You can snooze the alert and define until when.
- You can check what the alert conditions are (why is this alert activated?)
- You can also see the number of results related to this alert.

Service desk

Planon	Home							Turky 🗰 👗 7 SARVACEDESA
L Search								
()mana	Visitor log							M Avg. no. of calls per weekday
Front deals	Voting Sale							
Base data (hort (hold)				-0.946		II Seath		0
My alerts -	v Sharman a	with splitters	1.00			222		· · ·
	Address states						1-10-21	
	Valler rame	Voting date	Arrival time	Departure time	Inset	Volter status		Army Armen Alterny Armen
	1000	110000	(238)	1246	distant distag	Departant		
	- Bart	110000		1908	Transmit Inviting	Sugarana a	F access	督 Work orders per month
	and .	11-0/2022	12:00	1245	Fightern Bradieg	Departed		
	Cel 2910	419(00)	00.00	10.00	Titabeth Bradwy	Pagetter with	a second	0
	Date:	********	10.00	10.00	disawers describes	Regmented	a second	1 1 1 1 1
	. 8140	114000	10:00	1 (cop)	Alcoheth dramay	Neptond	A returned	
	Dealling Streets	11.01000	19100	11.85	Janue Dark	Departed		10 <u></u>
	gang binahang	comment	10:05	12:00	Elsabeth Brading	Augusteral	A second	
	3100.3	#10/2029	00:00	1000	those traffer	Auguitariat	4 Arrest	And the bar and the set of the life bar his
	philip meaning	11.6.202	15.66	1939	dispert limiter	bornet		
	Visitors in 0	he building		20	Visitors arrivin	g today	e a	Le Visitors without assigned reception time

When you are a Service Desk Persona you will see the following Navigation panel:

In the navigation panel a set of Navigation groups are available with a set of Navigation group items. In the following paragraphs each Navigation group and the related Navigation group items will be explained.

Home

As Service Desk Persona the home page will present a fixed set of Dashboards. The titles of the dashboards are self-explanatory in most cases. Visitor log is not only a report but also a tool to manage your visitors.

Visitor log

This report gives the Power user the possibility to filter on expected and registered visitors, but also to create new visitor logs via the button **Add new visitor**.

Visiting date						
m/d/yyyy			midiyyyyr		Search 5	
 Show more : 	search options					
	1 (1)					< 1 · 10 of 16 >
And a second second second						7 - 10 01 10
Add new visitor						(1.100.10)
100000000	Visiting date	Arrival time	Departure time	Host	Visitor status	
fisitor name			Departure time			
lisitor name	Visiting date	Arrival time	and second second	Host	Visitor status	
Add new visitor Visitor name Alice Bart Brad	Visiting date	Arrival time	12:45	Host Elizabeth Bradley	Visitor status Departed	

A visitor record can be selected and details will be presented. These details can be edited, but it is also possible to change the status of the visitor to 'arrived'.

Visitor details	>
Visitor status	
Departed	
Names(s)	
Alce	
Organization	
Visiting date	
Friday, November 4, 2022	
Expected arrival time	
1230	
Expected departure time	
1245	
Host	
Elizabeth Gradiey	
Visiting location	
03. WWB	
Created by	
Elizabeth Bradiey	
Comment	

If a visitor is not registered, the service desk persona can add the visitor to the system directly via **Add new visitor**.

iames(s)	
You can add multiple visitor names here	
Organization	
	1. 1.
/isiting date (m/d/yyyy)	
6/1/2023	a
expected arrival time (hh:mm)	
	0
Expected departure time (hh:mm)	0
	0
fost	
/isiting location	
	>
created by	
Comment	

Front desk

Visitor

This user group is created for users such as receptionist, service desk or workplace coordinator that are responsible for managing following key tasks:

- Create & manage workplace/FM announcements
- Track and manage visitors entering/exiting the office building
- View, add, modify, assign and manage facilities issues
- Manage facilities related base data

Announcements

Use the Announcements feature to share office updates and policies with employees in real-time. Workplace Announcements can go live immediately, or you can schedule announcements. Each announcement has a built-in workflow to give users the opportunity to review it before publishing it on the portal for building users to see.

1. Navigate to Announcements TSI

- 2. Add News categories. Also known as Dossier.
- 3. System status must be in Activated status

Create workplace announcement

- 1. Navigate to Workplace news selection level
- 2. Click **Add** button. A pop-up screen will prompt the user to first select a news category that is related to the announcement being created. Select a category from the list.
- 3. Use the Information field to enter announcement details
- 4. Fill in the start and end date-time for the announcement. Start date-time determines when the announcement goes live. End date-time is used to take-down the announcement.
- 5. While not required, it is encouraged to upload an image related to the announcement as it will make the announcement more appealing to the employee when they log in to their web portal and therefore, more chance of them looking at it.
- 6. When ready, change the status of the announcement to **Publish** to make it available in the Workplace News self-service gadget.`

The end result of the announcement is visible for the building user and looks as follows:

Home



Visitor log

The launch item Visitor log can be used for:

- Adding visitors
- Adding visitors to reservations ٠
- Set status to: ٠
- Arrived 0
- Cancelled 0
- Departed 0

Visitor log

Visitor	log			Today 🛗 🔺	? SERVICEDESK	5
In the file - clock	a add withow Merci 💿 🍸	General			a Visitora	2
Expected a 2 -	I herb. 0 Q					<u> </u>
0		Visitor information			+ Add	
0		Tuping visition	Raul Decosts		4 Add to receivation	
Valler statue	 Expected antival time 	External visitor			Conv	
C Visitors (20		Organization			X Delete	
11 · ·	10:00	tuminer of people			Status transitions	
10	1000	Visit date & time			· Arrival	
m 0	12:00					
00	10:00	 Voting data Expected arrival time 	11/15/2002 72:00		6 Cancelled	
10	10:00	Expected time of incarture	1200		* Departent	
th o	00.00	Actual time of arrival	1949		2 Show flow shagram	
NO DE	06:00	Artual time of Reparture	10.42		Report	
110	12:00	Assigned receptor time		13		
n ·				1.00	B Report	
	10/00	Hast (visitor for)				
iù v	00.00	Person	A4, Bradhy, B Bradath	8 8		
K3 ×	09:00	Property	Ut, Branniae Hill office park	0 (3		
nin v	09/00	Department	01. Enance	0 8		
ete a	11.00	Mettig	54015.05 Supplier unt	0		
19 V	08:00	Status				
ete *	1230	· vistor status	Augstawar	0		
10 -	12:00					
ata 🐵	09/00					
in o	08/00					
101 0	11.00					
	lana -				Carrier Car	

Facilities issues

The Service desk persona can create facilities requests/issues in this Launch item but also manage the created facilities requests/issues created by building users.

Via the action menu the Front desk persona can add a request and/or order. Every request and order has a certain set of data fields. The following fields refer to lists / tables that can be maintained on the 'Base data (Front desk)' Navigation center group:

- ٠ Requestor
- Internally assigned by ٠
- Standard order •
- Order group •
- Priority ٠

- Internal coordinator
- Internal tradesperson
- External tradesperson

Requestor / Internally assigned by

The field requestor is auto populated based on the logged in user when the request is made via a web form or via Mobile. When creating a request via the front desk, you can type in a part of the name (for example **ken** and auto-suggest is triggered.

Requestor		
Requestor		
Internally assigned by	13, Kennedy, K Kimberly	
Department	36, Kennedy, K Derek	
Facilities request	91, Mckenzie, M Jeffrey	J

Also using the browse icon to the right of the field you can search a list as well.

	Contains	: 5	arch		0 × + 0
Person type: Requeitor All					
Property	Pull name	First name	Phone number	Cost center.Code	Cost center.Name
3	jimenez, j John	john .	+1(216)481-6812	090000	Corporate Revi Estat
2	Wood, W Tracey	Tracey	+1(507)245-9104	050000	Sales & Marketing
3	Harrison, H Deborah	Deborah.	+1(646)752-4519	010000	Finance.
4	Ontiz, O Sarah	Sarah	+1(209)432-9760	090000	Corporate Real Estat
5	Allen, A Susan	Susan	+1(215)768-3048	090000	Corporate Real Estat
6	Reynolds. R Jaime	jaime	+1(620(328-1384	060000	Sales & Marketing
7	Santiago, S Ryan	Ryan	+100100037-2757	010200	Treasury
	Semano, Sijoy	309	+1(201)472-3610	060000	Sales & Markoting
	Gonzalez, G Michele	Michele	+1(352)281-2127	010200	Treasury
10	Macoey, M Sarah	Sarah	+1(408)775-2376	060000	Sales & Marketing
0.000	Chambers, C Tiffany	Tiffany	+1(715)579-9871	100000	Facility Mahagement

Standard orders:

Standard orders is a list of standard requests/orders that have been defined for the Planon Workplace Edition. See more information on standard orders later in this chapter.

Priority:

When a request is made you can define a priority to the request, for example 2 days*. The field 'Request completion date' will be auto populated with calculated date. Say for example, the request is reported in Planon on **May 1**st **2023 at 09:13**, the priority is set to **2 days**, the field Request completion date will be populated with **May 3**rd **2023 at 09:13**. **Internal coordinator & Internal/external tradesperson**

These fields can be populated manually when creating a request/order, but also populated automatically when it is defined in the Default personnel/vendor assignment TSI. More will be explained later in this chapter.

Base data (Front desk)

The following modules are available for the front desk persona to maintain in order to optimize the process.

Default personnel assignments Default vendor assignment External visitors Measurement units Order groups Organization (Addresses) Standard orders

Priorities

Default personnel assignments

Defaults are values that will be specified automatically on the data tabs of the order, as soon as a specific property and order group - for which these defaults have been registered - is selected for the order.

You can define default values for coordinators/tradespeople, based on the default settings for the Order group business objects.

Per building/property you can define the default Internal coordinator and the internal tradesperson depending on a certain user group. For example:

Default internal co	ordinators per pro	perty & order group	Oefault internal tradesp	ecple (per p	rope	ty & order group Comm	runication logs History - properties		
🗇 No filter - click t	to add or show filten	i.			0.1	r	General			
Order group		2 Search.		0	0	2				
0							Default internal co	ordinators per property & order group		
	W25		1973				roperty	Braintree hill office park	8	1
Order group.Descrip Nothing found	1000 ×[9106	perty Name] Full name				· Person	2. Wood. W Tracey	B	
nocing route.							+ Order group	01.02. Electrical		

Properties Breintree hill office park	Default personnel per				
Default internal coordinate	rs per property & order group	Default internal tradespeople per prope	rty & order group Comm	unication logs History - properties	
No filter - click to add or	them filters	0 1	General		
Order group 🕴 +	C Search	C O Q			
c			Default internal tra	despeople per property & order group	
	111100000000000000000000000000000000000	N 40400 (1000)	* Property	Braintree hill office park.	0 0
Order group Description	. Property Name	Full name	* Person	15, Johnson, J Steven	8 8
Nothing found			* Order group	61.02. Electrical	8.0

With these settings and creation of a request on building 'Braintree hill office park' and an order group 'Electrical' the field Internal coordinator will get the value Tracey Wood and the internal tradesperson will be Steven Johnsson.

If this is set up correctly and for all buildings and order groups, the values of the 2 fields will always be correctly populated when changing building or order group.

Default vendor assignment

The principle of the default vendor assignment is equal to the above paragraph, only here we have to define an address (Organization) and possibly a person. The edition is using only the external tradesperson (not the external coordinator).

Default	vendor	assig	nment		Testay 🛄 🔺
Properties Brainstee hill office per	Default adde	estes per			
	linators per property &	order group 🚺	Default external tradespeople pr	property & order group	
37 No Mier - El OLIS A	id or show filters			General	
Address	1 -	I berth.	0 0	a —	
0				Default external tradespeople per pr	rsperty & order group
-			T Address Name	Property	
order group Destration	· Property Nar		Address Name	 Address 	
strong found				Contact person	
				* Order group	

External visitors

In External visitors, you can add and maintain a list of external visitors, which can subsequently be used in the external visitors' list.

When adding a visitor to the visitor log and selecting the field 'External visitor' you can also add and maintain the external visitor data here.

First name	;	Contains	\$ Search	0 × + 0
ist name assen		General		External visitor A
		First name Last name Email Mobile phone number	Pietje Klassen	Copy Copy Copy
	-	Phone number Organization Comment		Report
		Last visiting date	2000 characters remaining (2000 maximum)	Cancel Save

Measurement units

In this pick list you can define the different measurement units e.g. Meter, Liter, Joule, Bar, Celsius, etc. These can be used for filtering when linked to a record.

Order groups

Order groups are used to categorize orders systematically into logical groups. For example, Health safety, IT services, Mechanical, Electrical, FM services and so on.

Order groups

estiptori	\$ Contains
=	
Order groups	
· · · · · · · · · · · · · · · · · · ·	1
at.at. Nech	anycal
🛢 01:02. Dentr	icul .
DULL SAME	Ry.
1 01.04 Deat	ing.
B 01.05. Rema	rvella.
B 01.05. Cater	PHE .
📓 út.at. Storg	D'Management
B ands. Offer	Republication
01.0% Meet	ing Services
101.10. Week	Management
📓 01.11. Secur	75
関 01.12. Tram	porti
📓 (0), 1, 1, Porta	1 services
📓 (21.14. Repri	graphy.
📓 03.15. Balak	ing structure

An order group is a hierarchical element which can be divided into subgroups. You can create a maximum of five levels. When you add a new order group a Code is automatically generated. That also applies to suborder groups (Code group field).

Organization (Addresses)

Addresses and contact persons are linked together in the **Organization** TSI, which is the ideal tool to monitor and update address data.

The **Organization** TSI can help streamline all your address-related processes. Whether you want to add, modify, or delete address data, transfer addresses to the archive, or link contact persons to addresses: the standard Organization TSI offers plenty of functionality to do this.

Here you can register your 3rd party companies and their contact's details, which you can use, for example, for reference (as External tradesperson) on a work order.

Priorities

On creating an order, end users can select a priority from a pick list to specify the term within which an order must be carried out.

Proceed as follows to add a priority.

- 1. Go to Priorities.
- 2. On the action panel, click Add.
- 3. On the data panel, enter the Priority code and Description.
- 4. In the Period field, click the Select a value button.

The Period dialog opens.

- Select a duration for the priority: Minute, Hour, Day, Week, Month or Year. In the Quantity field, enter the appropriate number of instances for the selected time unit. You can also select Unspecified, if no period is selected.
- 6. Click Save.

You have added a new priority. The priority will be displayed in the elements list.

Prioriti	es				Today 🏙 🔺
In the filter - click to	add or show Niters	0	General		
C Priority code	* Description	1	General * Priority code Description	26 2 days	
26	2 days		Period	2.0 <i>ays</i>	8
H	High				
L.	Low				
M.	Medium				
0	Urgent				

Standard orders

In Planon, standard orders are a kind of 'template' orders, which end users can use to speed up the process of feeding new orders into the system. If an end user applies a standard order, much order data is automatically entered that he or she would otherwise have to enter manually.

End users will benefit from applying standard orders in TSIs such as facilities and bookings.

Planon defined for Planon Workplace Edition a list of standard orders to support the Edition processes such as bookings and the list of possible facilities issues via Planon Workplace App and Self Services.

Standard orders in PWE can have standard suborders and order lines. There is a list of standard orders available, with different defects, catering orders, but also general Planon facilities issues #. The Planon facilities issues standard orders that can be adjusted on the name to make them Customer specific.

Beside the standard set, you can define your own attributes to these standards, such as:

- Priority
- Order group
- Show in app?

Standard orders

- AT_01, Catering Order
- FM000, Generic facilities issue
- FM001, Too hot / too cold
- FM002, Broken elevator

🖶 FM002_02, Fix elevator

- 🕨 🗐 FM003, Broken furniture
- FM004, Need cleaning
- FM005, Waste bin full
- FM006, Leak (tap, toilet, pipe, etc.)
- FM007, Odor
- FM008, Flickering light
- FM009, Need IT support (laptop, printer, WIFI...
- FM010, Issue with catering
- FM011, Planon facilities issue 0
- FM012, Planon facilities issue 1
- FM013, Planon facilities issue 2
- FM014, Planon facilities issue 3
- FM015, Planon facilities issue 4
- FM016, Planon facilities issue 5

My alerts

If there are any alerts created and linked to you as a user, you can find the alerts here. When there is an alert in your screen (top right) you can click on the alarm bell, and you will be redirected to **My alerts**.

My alerts * ? WORKPLACEMER W Sec to film - clok to add or show films 0.1 General Alarm statutes 0 0 1 Concerns Con 1 Sect + Ston results 0 ÷ ~ 0 Coox 18. 18. 11. ICon I-1 Promy Destrue Des B Rapp forward. 0 %0 --14 . Ponent to Ropos O 111 Yes 0 No at 24 MAG .

When there is an alert, you can see or do the following:

- You can view the alert (code and description)
- You can forward this alert and define to whom you want to forward it to.
- You can snooze the alert and define until when.
- You can check what the alert conditions are (why is this alert activated?)
- You can also see the number of results related to this alert.

Building Administrator

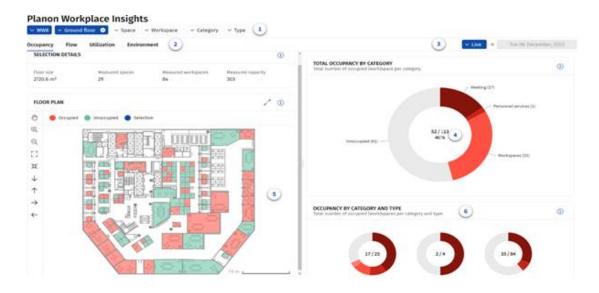
Building admin has access to the Navigation panel displayed on the left.

Planon			
Q Search			
😤 Home			
🛎 Insights dashboard	^		
⊡ General			
Lad Deep dives	^		
1: Occupancy			
Late 2.1: People flow (proper			
Ltd 2.2: People flow (floor)			
2.3: People flow (space)			
🗠 3: Utilization			
H 4: Environment			
♀ 5: Comfort scores			
6: Total occupancy			
E CAD integration	*		
Sensor Integration	~		
🔳 Base Data	~		
Alert settings	~		
A My alerts	~		

The Navigation groups **Workplace Insights** and **Deep Dives** are fixed and show results based on the data.

Insights dashboards

General



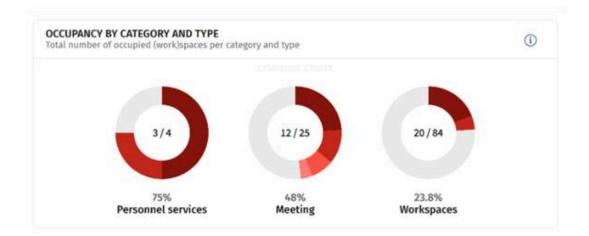
Live data

What's happening NOW?

Every minute, the dashboard is automatically refreshed to show you the most recent data.

That comes in handy when you want to understand the current status of occupancy, flow, and other variables, and to check if everything is working smoothly as it should.

Click the gif to zoom in



Past data

Discover trends

View data captured for a particular day, week, or month to discover trends and spot anything that is not looking quite right.

For example, for occupancy, see which spaces are **used often** and which ones are no one's favorite, and identify **peaks** and **duration of occupancy** of each space*.

With this knowledge, you can make accurate decisions to better leverage building space or solve any anomalies as soon as they arise, saving you money in the long haul.

* The same can be done with utilization, flow, and environment conditions.

Click the gif to zoom in.



Deep dives

Each Planon Workplace Insights module has a corresponding Deep dive section.

These are charts that have been specifically designed to enable workplace strategists to

- Analyze a broader trailing 12-month data set to make strategic decisions about their RE & workplace portfolio.
- Aggregate or combine data for multiple properties to get a bird's eye view of the selected portfolio.

• Benchmark properties to analyze time-based occupancy and net utilization metrics.

On each Deep dive set (e.g., Occupancy, etc.) you can filter on different aspects such as Property, floor, space category, etc. This will have an effect on all dashboards within the deep dive set.

When a filter is applied, the top-right corner of each dashboard displays an icon.

CAD Integration

Field mapping

CAD Inbox

Create drawing definitions

CAD import definitions

CAD Inbox

Before you can create a CAD import (see explanation later), the AutoCAD Drawings need to be uploaded into the CAD Inbox folder.

-PLANOM-						Tosey 🗰 🔺	? BUILDINGADNIN	0
Q. Search	C Na Ner		0 1					
n Home	Default samp 8 +	1 Surn.	C 0 9	General			* File sprivad	
L_ General	0.8	-1		Name Document	Dray file of Brance	4.6	. Deven	
Deep Dives -	EFRE uproved (1)							
12 1: Occupancy over time	OTL: Ten floor dwg							
4 2. from servers new till								
12 3 Usitation over time								
Let 4 UtiRation per weekd								
CAD integration -								
CAD shawing defensions								
4 CAD import definitions								
A CAD inters								

- 1. Go to TSI CAD Integration > CAD inbox.
- 2. Click Add
- 3. Upload Drawing (choose from a location)

Name		
Document	Drop file or Browse	1 1

4. Click Save

5. Drawing is being uploaded on the CAD Inbox folder

IMPORTANT: The file name of the drawing cannot contain spaces.

Not Correct: Building 5th floor.dwg

Correct: Building_5th-floor.dwg



• When a drawing has an XREF drawing link, make sure you also upload the XREF to the same location.

• When a new Drawing (updated) is to be stored in the CAD Inbox, delete the old record and create a new CAD Inbox file. We are looking for a better solution.

Create drawing definitions

For detailed information about CAD Drawing definitions, refer to the WebHelp.

A CAD drawing definition defines the relation between the data in Planon and the information in the AutoCAD drawing. Follow the following steps and detailed field explanation (minimum required) to create a correct CAD Drawing definition.

- 1. Go to TSI CAD Integration > CAD drawing definition
- 2. Click Add

General Audit info	0		
General			
• Code	Ľ		
Description			
Drawing			
 CAD drawing 	Drop file or Browse		1 =
 Unit of length in drawing 	M, Meter		
 StabiCAD drawing 	O Yes	O No	
Space standard			
Area measurement stan			
Apply construction thres	O Yes	O No	

- 3. Define a code for the drawing definition (e.g. CD_BUILD)
- Define a description for the drawing definition (e.g. CAD Drawing Building)
- 5. **CAD Drawing**: Select the drawing from the CAD Inbox. These should be uploaded as mentioned in paragraph 5.6.

6. Define the correct Unit of length in drawing. This can be retracted from the AutoCAD drawing.

Code	∧ Label	
CM	Centimeter	
FT	Foot	
IN	Inch	
М	Meter	
MM	Millimeter	

7. Click Save

Add CAD Business objects

You must specify the business objects to be imported from the CAD drawing into Planon. Besides the business objects in Planon, you can also specify construction data such as pillars, holes and other constructional elements that need to be imported into CAD Integrator FM drawings or constructional drawings.

Procedure

- 1. Go to CAD drawing definitions > CAD business objects.
- 2. On the action panel, click Add [CAD linked ...]
- a. For Floors > CAD linked floors
- b. For Spaces > CAD linked spaces
- c. For Workspaces > CAD linked spaces
- d. For Construction > CAD linked constructional data

CAD business objects (4)
Construction data
Floors
Spaces
Work spaces

Add CAD business object mapping

See the following example of CAD business object mapping per business objects.



For best UI presentation of the drawing in the dashboards, we recommend keeping the colors limited to dark grey.

Floors

Polyline classification - > 2, Gross

No field mapping required

General Audit info		
General		
 Linked business object 	Floors	
CAD layer	Planon_WPA_Fpoly	
Polyfine settings		
 Polyline classification 	2. Gross	
 Enclosed polylines 	×1, Hole	
CAD Integrator settings		
 Convert to CAD Integrator drawing 	O Yes	() No
CAD Integrator color		
Display value	Planon_WPA_Fpoly, Floors	

Spaces

Polyline classification - > 1, Net

Field mapping required: Field mapping

General Audit info		
General		
 Linked business object 	Spaces	
CAD layer	Planon_WPA_SPoly	
Polyline settings		
 Polyline classification 	1, Net	
Enclosed polylines	1, Space	
CAD Integrator settings		
 Convert to CAD Integrator drawing 	O Yes	O No
CAD Integrator color		
Display value	Planon_WPA_SPoly, Spaces	

Workspaces

Polyline classification - > 1, Net Field mapping required: Field mapping

General Audit info		
General		
 Linked business object 	Work Spaces	
CAD layer	Planon_WPA_WPPoly	
Polyline settings		
Polyline classification	1, Net	
 Enclosed polylines 	1, Space	
CAD Integrator settings		
 Convert to CAD Integrator drawing 	O Yes	() No
CAD Integrator color		
Display value	Planon_WPA_WPPoly, Work Spaces	

Construction data

Destination CAD Integrator Drawing > 2, FM drawing

No field mapping required

General Audit info	
General	
 Linked business object 	Construction data
CAD layer	Planon_WPA_Floor
 Destination CAD Integrator drawing 	2, FM drawing
CAD Integrator color	
Display value	Planon_WPA_Floor, Construction data

Field mapping

Spaces and Work spaces do need a space number mapping and preferable a name.

CAD drawing definitions NL_NIJME_WW8, Nijmegen		D business objects aces	Details			
CAD business obje	ct mapping	ield mapping				
🔘 No filter						۲
Business object	\$ =	Search			0	Q
C						
Business object.Nam	e ^ Fi	eld.Name	CAD lay	er.Descrip	otion	
🖾 CAD field mappi	ng (2)					
Spaces	S	pace number				
Spaces	N	ame				
	ness objects Details	_				
	ness objects Desails	_				
CAD drawing (GAD drawing definitions HTTDL THDL HTTDL	Norrg	Semeral Audit into				
CAD drawing definitions CAD drawing definitions EAD business object mapping CAD business object mapping	Desalle en Desalle Comp (Comp C	and a souther				
CAD drawing of Indones CAD drawing definitions CAD business object insepting CAD business	Desalle Control Con	netal				
CAD drawing definitions CAD business object memory Red memory CAD-business object memory Red memory	nessobjects Details	neral Ned business object	Won Spaces Won Spaces			
CAD drawing of Indones CAD drawing definitions CAD business object insepting CAD business	nessobjects Desalls	meral wed buciness object scription	Wurs Spaces Wors Space number			
CAD drawing definitions CAD business object mapping CAD business object mapping Teld mi Datiness object mapping Datiness object have CAD business object mapping CAD business object have CAD business obje	nessobjects Desalls	meral wed buciness object scription				
CAD drawing definitions CAD busis into, this CAD business object mapping Field on CAD business object mapping Field on CAD business object have CAD business object mapping (CAD field mapping (CAD fi	nessobjects Desalls	neral sorgoon Kd sinest object	Work Space number			
CAD drawing definitions CAD busis into, this CAD business object mapping Field on CAD business object mapping Field on CAD business object have CAD business object mapping (CAD field mapping (CAD fi	nessobjects Details spore C O Q Ga bit De De He bit De He bit Fer	neral sorgoon Kd sinest object	Work Space number			
CAD drawing of inters CAD business object mapping Field on CAD business object mapping Field on CAD business object mapping (Field on CAD business object have CAD files + \$ Search. CAD files + \$ Searc	nes objects Details	neral ked butiness object scription kid siness object sit spping unot	Work Space number			
CAD drawing of inters CAD business object mapping Field on CAD business object mapping Field on CAD business object mapping (Field on CAD business object have CAD files + \$ Search. CAD files + \$ Searc	nessobjects Details	nemal ked budiness object scription id stress object st appong unot D layer	Won Space number Spaces Space number			
CAD drawing of inters CAD business object mapping Field on CAD business object mapping Field on CAD business object mapping (Field on CAD business object have CAD files + \$ Search. CAD files + \$ Searc	nessobjetts Details Notifie (C O Q (C O Q (G C C C C C C C C C C C C C C C	neral ked butiness object scription kid siness object sit spping unot	Won Space number Spaces Space number			
CAD drawing definitions CAD busis into, this CAD business object mapping Field on CAD business object mapping Field on CAD business object have CAD business object mapping (CAD field mapping (CAD fi	nessobjects Details Notice COV COV COV COV COV COV COV COV	Ineral web business object scription Inf stress object ist approve party party busine D strong D strong S strong	Won Space number Spaces Space number			
CAD drawing definitions CAD business object mepping CAD business object mepping Teld me Dusiness object have CAD futures CAD futures CAD futures CAD business object mepping CAD business object have a constraint of the constraint object mepping CAD business object have a constraint of the constraint	nessobjects Details Notice COV COV COV COV COV COV COV COV	mental ward business object songoon Rd simess object st spong unon D system D sock D sock D sock	Won Space number Spaces Space number			
CAD drawing definitions CAD business object mepping CAD business object mepping Teld me Dusiness object have CAD futures CAD futures CAD futures CAD business object mepping CAD business object have a constraint of the constraint object mepping CAD business object have a constraint of the constraint	nessobjetts	Ineral web business object scription Inf stress object ist approve party party busine D strong D strong S strong	Won Space number Spaces Space number			
CAD drawing definitions CAD busis into, this CAD business object mapping Field on CAD business object mapping Field on CAD business object have CAD business object mapping (CAD field mapping (CAD fi	nessobjects Details Notice C. O. Q. C. O. Q. C. C. Pro- Pro	meral ked business object sorgsoon kid simess object sis boors D secon D sec	Won Space number Space number 1, Drawing Paron, WMA, WPBlock			
CAD drawing definitions CAD busis THICK THOS CAD business object mapping Field on C No filter Business object have - Seanth C Donness object have - Pield Nam C CAD field mapping (2) C CAD field mapping (2)	nessobjects Details Notice C. O. Q. G. C. Pro- P	meral keel business object scription keelss object sit sport particular D social D social Social	Won Space number Space number 1, Drawing Paron, WMA, WPBlock			

Define the CAD Layer where the (Work-) space number can be found in the drawing.



	Details	
CAD buisness object mapping		
O No filer D	T	
Bushess style	General Audit Info	
	General	
2	· Lintest business object	524015
assess object have - Pelitit have	Description	Spece number
7 CAD Reld Hepping (2) pages Spece number	Tield	
okos State number sates Name	Business object	Speciel
	• Fed	Space number
	Mapping	
	Source	7. Drawing -retrieve from XDec
	CAD layer	
	CAD SIGR CAD INTERNA	
	CAD default value	
	Default XML value	
	Display value	Spaces, Space rumber
	MEC	
	Start line End line	
	phone and a second s	
	XEATA	
	XData application name	egynt
		5000
Nith CAD Block	Graup code Occumente	1000 4
CAD drawing definitions CAD drawing definitions trying thematic tribung. CAD business objects Source	Осолганов	
CAD drawing defin	itions	
CAD drawing definitions CAD drawing definitions White thematic to Hears CAD business objects Savier		
CAD drawing definitions CAD drawing definitions tryint (thereast in theight) CAD business objects Server CAD business objects Server Server CAD Server Se	Itions Desails	
CAD drawing definitions AD drawing definitions trying (TRATILATE TO Holg) CAD business object mapping CAD business object mapping Notitar Business object + \$ Secth.	Courses	
CAD drawing definitions AD drawing definitions trini (1900) Aff to thing CAD business object mapping CAD business object mapping Notifier Statutes object = 1 (search. (1))	Courses	
CAD drawing definitions (AD drawing definitions (V) in (1900) Att it riving CAD business object mapping CAD business object mapp	Courses	-
CAD drawing definitions CAD drawing definitions Struct Thomas to be an applied CAD business object mapping No fitter No fitter Statiness object 1 is family. Statiness object Name CAD fueld mapping (1)	Courses	4
CAD drawing definitions try int (1900) Affect integral CAD business object mapping Notice No titer No	Courses	4 Spaces Spaces Spaces
CAD drawing definitions try int (1900-011) CAD business objects swine; CAD business object mapping CAD business object mapping	Courses	4 Space Space number
CAD drawing definitions try int (1900) Affect integral CAD business object mapping Notice No titer No	Courses	4 Spaces Spaces Spaces
CAD drawing definitions CAD drawing definitions Struct Thomas to be an applied CAD business object mapping No fitter No fitter Statiness object 1 is family. Statiness object Name CAD fueld mapping (1)	Courses	4 Spaces Space number Space number Spaces
CAD drawing definitions CAD drawing definitions CMD business object mapping CAD business object mapping No titer Business object 1 = 2 Search. () Statutess object Name CAD filed mapping (1)	Courses	4 Spaces
CAD drawing definitions (AD drawing definitions (V) int (1000 kt it intege) CAD business object mapping Notice No titler No titl	Courrence	4 Spaces Space number Space number Space number Unawing Reven with A_SBLOCK DNJ_faurreampel
CAD drawing definitions CAD drawing definitions Struct Thomas to be an applied CAD business object mapping No fitter No fitter Statiness object 1 is family. Statiness object Name CAD fueld mapping (1)	Courrens ICIONS Details Conversil Conver	4 Spaces
CAD drawing definitions try int (1900) Affect integral CAD business object mapping Notice No titer No	Courrence	4 Spaces Space number Space number Space number Unawing Reven with A_SBLOCK DNJ_faurreampel
CAD drawing definitions CAD drawing definitions CMD business object mapping CAD business object mapping No titer Business object 1 = 2 Search. () Statutess object Name CAD filed mapping (1)	Courses	4 Spaces Space number Space number Space number Unawing Reven with A_SBLOCK DNJ_faurreampel
CAD drawing definitions try int (1900) Affect integral CAD business object mapping Notice No titer No	Courses	4 Spaces Space number Space number Space number Unawing Reven with A_SBlock DNJ_faurreampel
CAD drawing definitions CAD business object mapping Teldinispong CAD business object mapping Teldinispong CAD business object in apping CAD business object in apping Business object in apping CAD business object	Courses	4 Spaces Space number Space number Space number Unawing Reven with A_SBlock DNJ_faurreampel

CAD drawing definitions as wpare, www. Norwager	CAD businets objects Talainet	Detail	N	
AD Susiness stips: mappi	ne Field mapping			
C No fiter		0 1	General Audit Info	
Business style # +	t last.	D Q		
2			General	
			Linead business object	Speces
rements of pinch Painteel	+ PostLharm		Description	Space number
CAD field mepping (2)		121	Field	
ACUTS .	Space number		· Dutimets abject	SDECES
eces	here.		Feig	Spece number
				april for the
			Mapping	
			· Silvroe	7. Drawing - retrieve from XDas
			CAD layer	
			CAD totols CAD attribute	
			CAD default value	
			Default MAL value	
			Display varue	Spaces, Space number
			MIDT	
			Start line	
			Drid line	
			XDATA.	
			XDate application name	ADVIT
			Discourse and the second s	
			Group code	1000

CAD import definitions

0

For detailed information about CAD Import definitions, refer to the WebHelp.

The following settings are important to have a seamless import based on the linked drawing and the linked Drawing Definition.

When creating a CAD import definition follow the print screen with the correct settings. Below the print screen you will find some references of certain fields that are specific to the customer, such as file name, etc.

	General Output options	Separator property-floor	Character property-floor Audit info			
	General					
	Code	01				
	Description	Demo - Simulator properties				
	General import settings					
	Create CAD metadata file?	O Yes	O No			
	Global drawing definition	01, Demo - Simulator properties				
	Property-floor retrieval	1. Drawing-floor mapping				
	Effective on	1, Start date of floor		1		
	Date on which changes become effecti	1/1/2022				
	Allow auto-correction?	O Yes	O No			
,	Import spaces (V/N)	O Yes	O No			
	Import workspaces	O Yes	O No			
	Import persons (Y/N)	1, No		1		
	Standard move request					
1	Import non-closed polylines	O Yes	O No			
1	Log detail level	3, High				
	Import location settings					
	File location of drawings	CAD_Inbox		-		
	Include subfolders	C Yes	O No			
	Delete input files (V/N)	C Yes	O No			
	Flie name wildcard filter					
	Start date for import file			苗		
	End date for import file			益	CAD Integrator settings	
	Last import log				Create CAD Integrator file	0
	Output location settings				Create CAD Integrator file Creation output folder structure C	0
	File location for output	CAD_Outbox		-	Update CAD Integrator FM drawing	-
	Overwrite output files (Y/N)	O Yes	O No		Output location for CAD Integrator	
					and a second the mode and mode and	-

- Create CAD metadata file? Set this to Yes. It will create an additional CAD Drawing that holds the UUID "Shared ID" which can be used for unique reference to sensor ID's.
- File name wildcard filter: this is up to the customer to define, but normally you can use the name of the drawing.
- Allow Auto-correction? To successfully run a CAD Import it is important that the drawings to be imported fulfill the proper requirements.

In order to check this, it is possible to run a CAD drawing verification. The result of this process is a log containing instructions to manually correct a drawing.

Manually correcting issues can be tedious and error prone. Sometimes it is also possible to automatically correct these issues while doing a verification.

This is how it works:

1. On your CAD import definition, set the field Allow auto-correction? to **Yes**. The status of this field (**Yes** or **No**) will be logged.

Before the drawing is auto corrected, it is first backed up. The location of the drawing backup is specified in **System settings > File locations > CAD Import auto-correction backups**. Here, you can retrieve the original drawings immediately after the CAD verification process. The backup location will also be shown in the validation log. While importing the CAD drawing, the verification process is triggered. This process is set up so that the correction and verification are handled in sequence. This allows for logging elements that could not be resolved automatically.

2. All elements that were corrected are logged (together with their AutoCAD handle ID).

Reducing drawing entities

To prevent blocking the CAD Import server in the Cloud, a maximum of entities for drawings has been implemented.

Importing CAD drawings has been restricted to a maximum of 300.000 entities.

To reduce the complexity and number of drawing entities, the Planon application can automatically reduce the number of entities by joining polylines. By doing so, multiple polylines will be reduced to one.

Process

- 1. During verification, if the number of entities exceeds 15.000, the joining process is started.
- 2. If, after joining, the drawing entities exceeds 300.000 entities, the user will be prompted to manually reduce the entities in the drawing (error in the verification log).

If the number of entities in a drawing exceeds 15.000 but is less than 300.000, a warning message is given in the verification log.

To assist in identifying the problem areas, the log lists the layers and blocks and their corresponding number of entities.

General Output options S	eparator property-floor	Character property-floor Audit info	
Folder options			
Add month to output folder	O Yes	O No	
 Add date to output folder 	O Yes	O No	
Subfolder options			
 Add file as folder to output subfolders 	O Yes	O No	
 Add month to output subfolders 	() Yes	O No	
 Add date to output subfolders 	O Yes	No No	
Name of history (sub)folder			
History folder			
Space specific options			
Space code wildcard filter			
 New space size or usage after data chan 	O Yes	O No	
 Threshold new space dimensions 	0.1		m²
 Resume spaces 	O Yes	O No	
End spaces	O Yes	O No	
Asset specific options			
 Remove simple assets 	O Yes	O No	
Fixed workspace settings			
Workspace code wildcard filter			
 New workspace details after change 	O Yes	O No	
 Workspace update area 	() Yes	O No	
Resume workspaces	O Yes	O No	
• End workspaces	O Yes	O No	

Mapping between drawing & floor

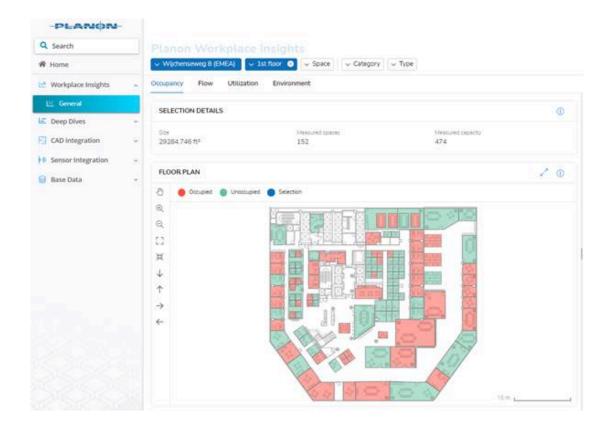
With this tab and fields, you will be able to select the correct drawing that is going to be imported and linked to the correct property and floor (of that building):

General Audit	info	
General		
 CAD drawing 	WW6_Floor_0.dwg	
Property	WW6, WW6	8
 Floor code 	00, Ground Floor	8 8

Run CAD import

When CAD Drawing definition is created and linked to the created CAD import Definition. You can run verification first and when all is fine run the CAD import by clicking **Run CAD import**.

Check the logs and finally check the spaces in TSI **Spaces**. Check the result in the CAD Integrator view by selecting a space and viewing it in CAD Integrator. Check view on Workplace Insights > **General**. The drawings should appear when selecting the floor:



Sensor Integration

Sensor Management

AppCenter

Inbound (Raw) Messages

Immeasurable

Sensor Management

Sensor Management is the TSI where the final connection is made between Planon spaces and the sensor system. To be able to get the final connection, complete the following steps to get the right results.

The tabs **Properties** and **Locations** are skipped, because these are fixed and a summary of data that is already mentioned earlier in this document.

Data engines

In **Data engines** there is already a Default Engine defined. Check the settings:

- Polling interval (sec) = 60
- Last response date-time = If that is today it seems to be running.

				Today 💼 🗎 🌲	? BUILDINGADMIN B
Properties	Locations	Data angines	Connectors Configura	tions & logging Measuremen	t points
Details					
C No fiter		0.7	General Audit info		Data engines
Code D C	Contains \$ Search	0 9			> Data engines
0			identification		- T AN
Code	+ Name	4	• Code 001		Report +
Data engines (1)			Name Default Comment		Report
001	Ortholt				
			1 500000 charao	ters remaining (\$00000 inautruins	
			Configuration		
			Polling interval (sec) 50		
			Synchronization		
			Last response date-ti \$/5/2021 10:10:31		



Make sure that the user AWMDATAENGINEADMIN is linked to the user group **Awmdataengineadmin – AWM – Data engine account**. As Supervisor user you can check this on TSI **Accounts**:

Q Search	User groups	Users	U	lser setting	3		
🕷 Home							
🗄 Core TSIs - Partner	No filter		0	Y	General		
	Description \$ Contr	ens 🗘 Search		Q.			
Supporting data - Partn.	·				General		
I≣ Tools	and the second s	scription	1	1	and the second se	windataengineadmin	
	Diller mount (23)	and some one	10		Users Oser name	10	
Accounts		sentials Edition Client Admin			AWMDATAENG/NEADA	Description	
						Vergesense Conne	
🌲 Accounts	Avendataenginea AV	VM - Data engine account			VERGESENSE	vergesense Conne	107
Connectors		VM - Data engine account			VEKUESENDE	vergesense Conne	tor -

Planon Workplace Insights is using **Connectors** for the connection with the measurement points of the sensor vendor to get readings into Planon.

Planon Workplace Insights is using **Connectors – Onboarding** to be able to auto onboard measurement points from the sensor vendor.

Custom managed connector

This section describes, at this moment, Customed Managed Measurement Point. This is because we deploy Insights mainly for customers that are using the mentioned Connectors, see also Connectors (Space & Reservation Manager).

Create the connectors via Action button Add Customed Managed Measurement Point.

When all steps above are taken, you should be able to fill in the fields as shown below, with of course the correct related data.

For example, the connector as shown below.

General	Error monitoring	Settings	Settings example	Settings schema	Audit info		
Identification							
• Code			AWM_SIMULATOR				
Name			Braintree hill office park				
Comment							
						500000 characters remaining (500000 maxin	num)
Data engine			001, Default				8
Connection							
Class name			com.awmconnector.polie	r.AWMSimulationSchedu	liedTask		6
App name			awmconnector				
App module na	ne		module				
Onboarding ref	erence		AWMSIMONBOARDER, AV	WM Onboarder - Planon	Braintree Boston	E	
Partner identifie	ar (planonsoftware.com				
System status			🕩 1, Active				8
Polling offset							
Poll every x cycl	es						
Alert on status	Immeasurable						
Email address(e	5)						

When creating a connector for Vergesense, the defined code for the connector is to be set in the **Connector app > Module settings**. For example, when you define the code as XXX_Vergesense, this code needs to be placed, as is, in the module settings of the app. See the following example:

General Settings exam	nple Settings schema Audit info	
General		
App module	connector	8
Description	Settings for the Vergesense Connector app	
 Sectings 		
// Settings for the Vergesense C { // Code of Measurement Point "measurementPointConnecto }	t Connector	

Configuration & logging

Within this selection level you need to define the Measurement point definition via button **Add Measurement point definition**.

Populate the following fields:

- Code
- Name
- Connector

Save the definition.

Properties	Locations	Ovia engines	Connectors dot, Religio convertor	Configurations & logging	Measurement points	Details	
Defendante Martu	veners port types - Event is	p.					
ID Neffer			0 1	General Audit info			
Cole	E Conteins	B. Search	0 9				
0				identification			
Sa_ = Code	1Rume			• Code	002		
Measurement poin				Name	Relage definition		
a	Relaga della						
						100000 sharacters remain	ning (500000 maximum)
				Ide one - no valid severvato	an (
				Configuration			
				· Corrector	(03), Relogia connertor		8

If you linked the Measurement point definition to a connector that is already active you cannot make any changes. To be able to make changes you need to inactivate the connector.

When you save the Measurement point definition, and the linked connector is inactive you can define Linked supplementary measurement points.

Business object	¢ -	\$ Search		C 0 × + Q
Available		In use		
lame	-	Name	~	
Rattery status (voltage)		Nothing found		
Carbon dioxide (CO2)				
Row In				
Now out				
free field 1 for vendor spec	sific re			
free field 2 for vendor spec	cific re			
free field 3 for vendor spec	cific re			
free measurement field 10	i			
iree measurement field 5				
ree measurement field 6		0		
Free measurement field 7		0		
ree measurement field 8				
Free measurement field 9				
Humidity (%)				
light				
Power level (kWh)				
Radon				
iound				
femperature				
/olatile organic compound	s (VOC)			
All None		All None		

In the Planon application, a measurement point is distinguished by its role.

A measurement point can be either of the following roles:

- Primary measurement point This is the main measurement point for collecting data (data of all subordinate measurement points is aggregated to this measurement point). A primary measurement point can be used to display availability (in Kiosk, CAD viewer, apps):
 - **Primary A**: the readings of the measurement point are used to determine the location's availability. Kiosk, CAD viewer, mobile apps will display the availability of the location based on the values of the measurement point.

Environmental readings of supplementary measurement points will be stored here for display in Kiosk or apps. The **Display availability** field will be set to **Yes**.

 Primary B: the reservation for a location rather than the measurement point reading is leading in determining its availability. Kiosk, CAD viewer, mobile apps do not use the measurement point but if the location is a reservation unit they display the reservation data. The values about occupancy on the measurement point do not need to be empty, they can still be used for insights into the space usage.

Environmental readings of supplementary measurement points will be stored here for display in Kiosk or apps. The **Display availability** field will be set to **Yes**.

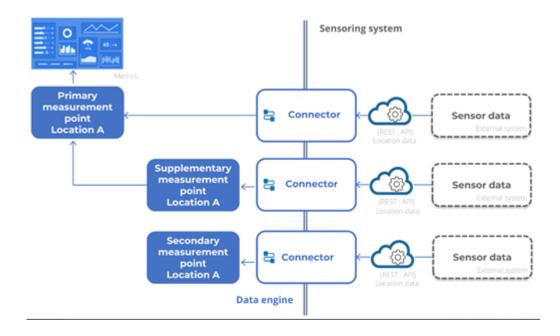
- Supplementary measurement point This type of measurement point is introduced to process data correctly when using multiple connectors per location. When doing so, it is important to ensure that data of one connector is not blocking the data of another connector. This is achieved by using supplementary measurement points. Its data is passed on to the primary measurement point (A or B). Supplementary measurement points are not used to record occupancy, but a set of environmental data:
- Free field 1/3 for vendor specific readings
- Battery status
- Carbon dioxide
- Humidity
- Light
- Noise
- Power level
- Temperature
- Radon
- Volatile organic compounds (VOCs)
- Particle matter (PM2,5 / PM10)
- Free measurement field 1-10

In order to know which data should be copied, you must link the data fields to the respective supplementary measurement point.

The readings of supplementary measurement points are stored at the primary measurement point. They are not stored on the supplementary measurement points themselves to ensure system performance.

Secondary measurement point

Rather than occupancy, this type of measurement point is meant for providing auxiliary information, such as whether the waste bin is full or for testing new sensors. Consequently, its data is not collected and aggregated to the primary measurement point.



Measurement points

In this Selection level the final connection is made between the location and the sensor. For a measurement point you need to know the following values (fields):

- General tab:
- Code = (Sensor ID received from vendor)
- Name = (Space code from Planon)
- Measurement point definition
- Configuration tab:
- Maximum capacity (no.) = Depending on the type of space (meeting room for example 8, desk normally 1)
- Property, floor, space = Only 1 can be linked to a measurement point.
- Time zone = auto populated when saved and set to active (based on time zone linked to building of the related space. When building has no time zone set, it will autofill with the Default Time zone).
- Calendar = auto populated when saved and set to active (based on Calendar linked to building of the related space. When a building has no Calendar set, it will autofill with the Default Calendar).
- **Reporting** tab (these need to be populated for the presentation on the Deep Dives Dashboards). These should be equal to the linked space.
- Property
- Floor

- Space category
- Space type

When Measurement point is created (saved) set the measurement point to Active.

When this last step is done, and all other connectors are active you should get the first results of readings in about 5 minutes.

Properties	Locations	Data engines	Connectors 003, Relogix connector
Details			
Readings Hourly s	ummarized readings Senso	re	
Houriy's	difficience resources served		
C No filter		Gene	ral Free measurement fields
C			
Occupan No	ormaliz ~	Identific	tation
	t readings (>100)	Measure	ement po 1030234, 22.203C
	4/2021 11:58	Period	
1 8/	4/2021 11:56	Reading	date/time 8/4/2021 03:47
0 8/	4/2021 11:50	Normali	zed date 8/4/2021 11:48
1 8/	4/2021 11:48	2 Previous	s normali 8/4/2021 11:32
0.8/	4/2021 11:32	Ochies	
1 8/	4/2021 11:30	Occupa	incy measurement
0 8/	4/2021 11:26	Occupar	ncy value 1
		0	hcy status 8/4/2021 11:48

AppCenter

This is the place where all apps are installed (Installing apps) and updated (Updating apps).

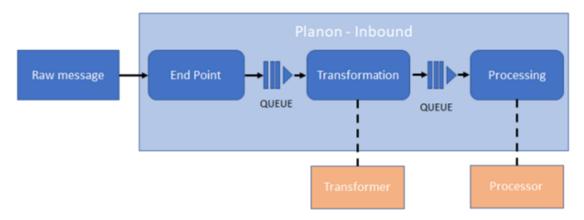
Inbound (Raw) Messages

Event connector is a gateway between third-party applications and Planon.

It is designed to process messages that are sent by another application, and which need to be processed in the Planon application, and vice versa. Consequently, there is an inbound stream and an outbound stream.

Inbound

A message can be anything in any format. Consequently, the Planon application needs to be instructed on how to specifically handle messages.



Typically, inbound messages need to be received, transformed and processed. Accordingly, Event connector consists of the following three TSIs (and business objects):

- Inbound raw messages
- Inbound messages
- Business events

Event connector can generically be applied to process all kinds of messages (data), that can subsequently be processed by the Planon application.

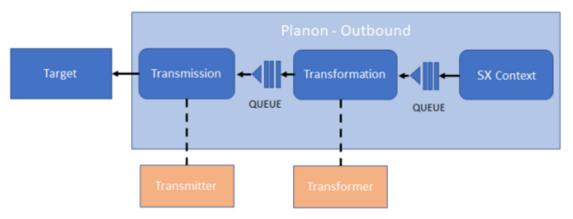
Outbound

Whenever a specific message is received, it will be queued for transformation.

Once transformed into an outbound message, it will be queued again for transmission. The result will be an outbound raw message.

Accordingly, Event connector consists of the following two TSIs (and business objects):

- Outbound messages
- Outbound raw messages



The outbound raw message will subsequently be sent to the target, which can be anything, such as: another application, email, log, REST API, another Planon endpoint...

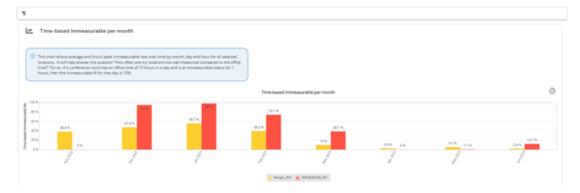
Immeasurable

This chart shows average and (hour) peak immeasurable rate over time by month, day and hour for all selected locations.

It helps answer the question "How often are my locations not well measured compared to the office time?"

For example, if a conference room has an office time of 10 hours in a day and is at immeasurable status for 1 hour, then the immeasurable % for that day is 10%.

Immeasurable



Base data

See the following list of TSIs that contain the base data section for Building admin.

Properties & floors

Spaces & workspaces

Space category & type

Workspace type

Department

Cost centers

Properties & floors

Properties are key for data onboarding. Depending on the scope you can create the required properties and related floors for the properties. The properties and floors can be created in the TSI Properties and floors.

Creation of Properties and floors can be done manually (advised when only a few) or via available SDI Import sheets (advised when large number of records are applicable)

The following fields are advised to populate to optimize the process of onboarding and getting the best results in the Dashboards:

- Property code
- Name
- Environmental profile
- Max allowed people
- Time zone
- Calendar

Spaces & workspaces

This TSI is to set up your property portfolio and the related floors, spaces, and workspaces.

Properties

It starts with creating your property table. The property table has a hierarchy of three levels. In Planon Workplace Edition you can create:

- Site
- Building
- Terrain

Each type of object has its own set of data fields. In general, they are the same, but there are some differences. In this document we will focus on the type **Building**.

terrere less transm	Broakersee			
Note: on task care feet	· · · · · · · · · · · · · · · · · · ·			- ten
ann Linne Linne (• Party and	P. Second States		* 1000,000000 * 1000,0000000000
Transiti	-		0.51.8	Austra + nor- tternat- # Con
	Satur Intel Administrative Progenia Administra	1 million and provide		Y (sax Y tank a print 2 tang tan anna
	anima Su	el desenar la cellas pero Seguras Reconse		-
	discover 14 mars	of union lane.	0 0	A Description
	a firecora Commente	transformer.	B (7	8
	i linear			1.000

Most of the fields are self-explanatory. The following fields are explained in detail:

- City: Choose a city from the list (**Base data** (space) > **Cities**)
- Country: Choose a country from the list (This list holds all possible countries including the Country code)

- Time zone: Choose the time zone that is applicable for the building (This is a predefined list of all possible time zones).
- Max allowed people: Define the number of Maximum allowed people in the building. This data is used when using People flow sensor on building level.
- Environmental profile: Define which Environmental profile is applicable for this building. When empty, the default Environmental profile will be used. When multiple profiles are available, choose the one that is applicable for this building. (User group Building Admin: Base data > Profiles & targets).
- Calendar: Define the Company calendar that applies to this building. When empty, the default calendar will be used. (Base data (space) > Calendars).

Components

The selection level **Components** holds the following selection steps:

- Floors
- Define for each building the floors that are available in the building. When adding a floor define the following:
 - Reference date (See Reference date)
 - The building
 - The floor (there is fixed list available)
 - The name of the floor is auto populated based on the description of the chosen floor
 - Floor sequence is auto populated by the chosen floor (for example, 3rd
 Basement floor = -3, 6th floor = 6)
 - Start date (based on set reference date) or can be changed on 'Floor attributes'
 - Max allowed people: Define the number of Maximum allowed people on the floor. This data is used when using People flow sensor on floor level. This can be added/adjusted on 'Floor attributes'
 - Font sizes: Here you can define the font sizes for the different attributes in the drawing. This will result in a better view of the data on the floorplan.

General Font sizes	-
Default font sizes for this	drawing
Unit of length	
Title font size	150
Legend font size	150
Space font size	46
Asset font size	127
Person font size	127
Fixed workspace font size	25
System fields	
Flexible workspace font size	127

• You can view details of the floor via data view or the floor in CAD integrator view:



Space categories

In this selection step you can group spaces based on the required cleaning work program - for example office and sanitary spaces.

Floors	Space categories	Space types	Departments	Cost centers	Space standards
O No	filter - click to add or sh	iow filters			8 T
Code	\$ Con	tains	\$ Search		8 Q
0					
Code		 Description 		l.	
🗌 Space	e categories (5)				
010		Office			
020		Meeting			
030		Circulation			
040		Personnel s	ervices		
050		Vertical pen	etration		

A space category can be linked to a space to group and report on it. This is used in for example:

Planon Workplace Insights Dashboards

CAD Integrator > Space mapping

Space types

In this selection step you can view or enter spaces with a specific type of space usage – for example offices, warehouses, or conference rooms.

Q

When spaces are linked to a space type it is possible to assign them to people/ employees. To be able to do so, the field **Assignable?** needs to be set to **Yes**. If there are workspaces related to this space the desks are also assignable. If the space is not assignable, the workspaces are also not assignable.

Floors	Space categories Space types	Departments
O No f	ilter - click to add or show filters	
Code	Contains Search	
2 🖬		
Code	 Name 	T
Space	types (16)	
01	Huddle room (1-4)	
02	Medium meeting room (5-10)	
03	Large meeting room (11-18)	
04	X-Large meeting room (19+)	
05	Private office	
06	Shared enclosed office	
07	Shared open office	
08	Restroom	

A space type can be linked to a space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- CAD Integrator > Space mapping

Departments

With this selection step you can filter spaces by department.

As Space & Reservations manager you can adjust this list. The departments table has a hierarchy of max 10 levels.

Floors	Space categories	Space types	Departments			
O No f	ilter - click to add or sh	now filters				
Code	Contains	\$ Search				
0						
Η Dep	artments					
•	00, Central staff					
	00.01, Corporate So	cial Responsibili	ity			
-	▼ ■■ 01, Finance					
•	01.01, Control & Ac	counting				
	01.01.01, Corpora	ate Operational /	Audit			
	01.02, Treasury					
	01.03, Fiscal Affairs					
	01.04, Risk Manage	ment				
	02, Human Resources	5				
•	03, Research & Develo	opment				

- 04, ICT
- 05, Procurement

A department can be linked to a (work-)space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- CAD Integrator > Space mapping

Cost centers

With this selection step you can filter spaces by cost center. Cost centers are units like departments which are used in cost accounting and to which costs can be charged.

As Space & Reservations manager you can adjust this list. The cost center table has no hierarchy.

Floors	Space categories Space types Departments	Cost centers
💿 No f	ilter - click to add or show filters	8 T
Code	🗘 Contains 🌲 Search	© Q
2 🖬		
Code	 Name 	
🗹 Cost c	enters (21)	
010000	Finance	
010100	Control & Accounting	
010101	Corporate Operational Audit	
010200	Treasury	
010300	Fiscal Affairs	
020000	Human Resources	
030000	Research & Development	
030100	Innovation	
030200	Manufacturing	
040000	ICT	

Space standards

In this selection step you can select spaces according to a hierarchical system of space standards. You can edit the main space standard and make changes to the hierarchy as required. By default, the Edition has the BOMA, US Standard list:

Floors	Space categories	Space types	Departments	Cost centers	Space standards		
O No f	ilter - click to add or sl	now filters			8 T		
Code	\$ Cor	tains	\$ Search		8 Q		
3							
🕒 Spa	ce standards (9)						
- =	BOMA, US Standard						
- 6	💌 늘 GBA, Gross Building Area						
-	🗢 🚘 GBA.MA, Measured Area						
	💌 🞥 GBA.BCA, Building Common Area						
	GBA.BCA.FCA, Floor Common Area						
	🔻 🔚 GBA.BRA, Building Rentable Area						
	💌 🚞 GBA.BRA.FRA, Floor Rentable Area						
	GBA.BRA.FRA.OA, Office Area						
	GBA.MVP, Major	Vertical Penetrati	ions				

The selection level **Spaces** holds the following selection steps:

Spaces

You can view details of the space via data view or the floor in CAD integrator view:



When a floor is created and linked to a property, spaces can be imported via the Cad Import (see CAD Integration). Advised for all Edition customers is to have the CAD Drawing be the source of all spaces that need to be in the application.

When spaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On space level, the following is possible:

- Add, change Space number (Advise not to do so if CAD drawing is the source)
- Add, change name
- Upload an image related to the space
- Finishings, e.g. Floor-, Wall- and Ceiling finishes
- Actions available:
- Generate a QR code



- Go to: These are steps that lead you to another table with specific data related to the selected space.
 - Bookable unit
 - Measurement point
 - Space occupants
- Add, Copy, Delete, End, Resume space (Advise not to do so if CAD drawing is the source)
- Modify space usage: When selecting this action, it will ask for a modification date. This means that the change is applicable from that date. This can be in the past, today or in the future. The following fields can be adjusted via this action:
 - Department
 - Cost center
 - Space category
 - Space type
 - Space standard
 - Space capacity

Floor attributes

When a floor is created on Floor attributes some changes can be made. After a CAD Import of a floor (creating spaces) it will also display the Drawing locations used for the import.

On Floor attributes the following is possible:

- Change the start date of the floor.
- Add the number of Maximum capacity.
- Define the font sizes.

Workspaces

Usage

This is the area where you can change specific usage of a space (via modify within selection or one by one). For example, changing the following data fields:

- Code
- Start date
- · Give an end date
- Change net area
- Department
- Cost center
- Space category
- Space type
- Space standard
- Space capacity

Dimensions

Certain dimensions might be applicable to maintain.

- Volume (fill in manually or it is auto populated based on value Clear height.)
- Clear Hight (when added value, it automatically calculates and populates the field Volume. If there is a value in the field volume it will be overwritten)

Workspaces

You can view details of the workspace via data view or the floor in CAD integrator view:



When a space is created via the Cad Import (see CAD Integration) and workspaces are within that space, they will be created on the selection step Workspaces. Advised for all Edition customers is to have the CAD Drawing be the source of all workspaces that need to be in the application.

When workspaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On workspace level the following is possible:

- Add, change code of the workspace (Advise not to do so if CAD drawing is the source)
- Add, change name.

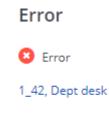
- Actions available:
 - Generate a QR code



- Go to: These are steps that lead you to another table with specific data related to the selected space.
 - Bookable unit
 - Measurement point
 - Workspace occupants
- Add, Copy, Delete, End, Resume workspace (We recommend not to do so if CAD drawing is the source)
- Modify
 - Workspace details
 - Occupancy data (only possible when related space is set to 'Assignable'.
- Make reservable
 - When made reservable a Flexible workspace (Also a reservation unit) is being created.
 - Use the 'go to' action to navigate to the related Flexible workspace

Reservation units	Boolings		woarie .						
······································	- fort			0 1	Flexible workspa			10	12
Provento L.1 C. N. Fr. P. D. W. Angenty Stame	Pear Name	\$ Sarrh.		e o o o	Property Poor Space Montechan	D1. Braining hit office parts D2. Bin floor 11. Julie Shared office 1. Jik Own own	0 C 0 0 C	Actions III Chees QR os Go to	•
Bairtne til office park	Ab for	1.8	Deut drief		Code Name Mage	Call	0215	Masurement Monispace de Monispace de Monispace de Acc + O Copy X Deales	ale .

- Make unreservable
 - When you want to set a reservable desk to a non-reservable desk you may get this error message:



* Active reservations exist for fixed workspace 'Dept desk' via flexible workspace 'Dept desk'. Therefore, you cannot make the fixed workspace non-reservable. (RESM_E061)

When you go to the reservable desk and complete or cancel all reservations of this desk and archive them, the error does not appear again.

×

- 1. Select reservable desk
- 2. Go to Bookable unit
- 3. Navigate from reservation unit to bookings
- 4. Complete or cancel all related bookings (one by one or via action on selection)
- 5. Archive all related bookings (one by one or via action on selection)
- 6. Go back to the reservation unit / bookable unit
- 7. Go to Workspace details
- 8. Make unreservable

History

History is a table that contains data that relates to the selected record and what changes have been made in the past:

- When?
- By whom?
- Related record
- What field has been changed?
- Old value
- New value

Occupancies

When a space is assignable you can assign people to the space or to a workspace. The following fields can be populated:

- Space
- Workspace (when workspace is filled in the space will automatically be populated with the related space of the selected workspace).
- Start date.

- Proposed end date (when no end date, it will be assigned until a date has been given)
- Owner (employee from the personnel list)
- Position (Auto populated when data is linked to person in Personnel table)
- Required area (Auto populated when data is linked to person in Personnel table)
- Department (Auto populated when data is linked to person in Personnel table)
- Cost center (Auto populated when data is linked to person in Personnel table)
- Occupancy rate (by default 100 but can be changed)
- Define which day is a working day.
 - by default, Monday to Friday = working day
 - by default, Saturday and Sunday = non-working day

Usage

Also known as the Workspace details. Here you can change the following fields:

- Space
- Available area
- Start date
- Department
- Cost center
- Workspace type (base data
- Capacity (multiply by 100)
 - When capacity of desk is 1 person populate field with 100
 - When capacity of desk is 4 persons populate field with 400

Actions available:

- 'Go to' Personnel (navigate to the personnel record of the related person to the selected workspace occupancy).
- 'Go to' Workspace (navigate to the related workspace of the selected occupancy)
- Add, Copy, Delete

Space category & type

Here the Building administrator can manage the lists of Space Category and Space types.

There are space categories defined in Planon Edition, but this list can be adjusted and maintained:

Space ca	tegories Space type	es
💿 No fi	ilter - click to add or show	w filters
Code		Contains
2 🖬		
Code	 Description 	
Space	categories (5)	
010	Office	
020	Meeting	
030	Circulation	
040	Personnel servic	es
050	Vertical penetrat	tion

Space types

Per Space category there are space types available. It is important to define the correct space type to the space category. A predefined list is available, but also here the Building administrator can adjust and maintain.

Image: Space category \$ = \$ Search. Space category \$ = \$ Search. Image: Space category \$ = \$ Name Image: Space category \$ Huddle room (1-4) \$ Search. Image: Space category \$ Huddle room (1-4) \$ Open (1-4) Image: Space category \$ Storage room (11-18) \$ Open/informal Image: Space category \$ Storage room \$ Storage room \$ Storage room Image: Space category \$ Storage room \$ Storage room \$ Storage room Image: Space category \$ Storage room \$ Storage room \$ Storage room Image: Space category	Space categories	Space types	
Code Name Space types (16) Huddle room (1-4) 01 Huddle room (1-4) 02 Medium meeting room (5-10) 03 Large meeting room (11-18) 04 X-Large meeting room (19+) 05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	O No filter - click to	add or show	filters
Code Name Space types (16) Huddle room (1-4) 01 Huddle room (1-4) 02 Medium meeting room (5-10) 03 Large meeting room (11-18) 04 X-Large meeting room (19+) 05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	Space category	\$ =	Search
Space types (16) 01 Huddle room (1-4) 02 Medium meeting room (5-10) 03 Large meeting room (1-18) 04 X-Large meeting room (19+) 05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainvell 13 Reception 14 Lobby/corridor 15 Open/informal	2 =		
01Huddle room (1-4)02Medium meeting room (5-10)03Large meeting room (11-18)04X-Large meeting room (19+)05Private office06Shared enclosed office07Shared open office08Restroom09Breakroom10Storage room11Elevator12Stainvell13Reception14Lobby/corridor15Open/informal	Code	~	Name
02 Medium meeting room (5-10) 03 Large meeting room (11-18) 04 X-Large meeting room (19+) 05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	🖾 Space types (16)		
03Large meeting room (11-18)04X-Large meeting room (19+)05Private office06Shared enclosed office07Shared open office08Restroom09Breakroom10Storage room11Elevator12Stainvell13Reception14Lobby/corridor15Open/informal	01		Huddle room (1-4)
04 X-Large meeting room (19+) 05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainvell 13 Reception 14 Lobby/corridor 15 Open/informal	02		Medium meeting room (5-10)
05 Private office 06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	03		Large meeting room (11-18)
06 Shared enclosed office 07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	04		X-Large meeting room (19+)
07 Shared open office 08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	05		Private office
08 Restroom 09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	06		Shared enclosed office
09 Breakroom 10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	07		Shared open office
10 Storage room 11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	08		Restroom
11 Elevator 12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	09		Breakroom
12 Stainwell 13 Reception 14 Lobby/corridor 15 Open/informal	10		Storage room
13 Reception 14 Lobby/corridor 15 Open/informal	11		Elevator
14 Lobby/corridor 15 Open/informal	12		Stairwell
15 Open/informal	13		Reception
-	14		Lobby/corridor
16 Server room	15		Open/informal
	16		Server room

Workspace type

Equal to Space types, there are also Workspace types. There is a predefined list, but it can be adjusted / maintained.

Workspace type

O No filter - click to add or show filters			
Code	Contains		
0			
Code	Description		
🖾 Workspace type	0		
01	Standard desk		
02	Team desk		
03	Desk w filing cabinet		
04	Desk w part wall		

Department

When the customer wants to connect a department to a Space the departments need to be available in the TSI **Departments**.

The Building administrator can create the list manually or via available SDI import sheets.

Departments			Today 🗰 🐥
No fiber - click to add or show fibers	General Audit info		
	Q General Cole Department Transfared name Language Description	01 Corporate Social Responsibility	
00101_Corporate Social Responsibility 00101_Corporate Social Responsibility 001_Provember 001_Provember 001_Procember 001_Procember 001_Social & Manueling 001_Social 001_Social & Manueling 001_Social 001_Social & Manuel	Deuton Englin US Relevants • Coler group Perrititeet Coler & hardwing Gib Integriter tracting Gib Integriter teching Gib Integriter teching	Corpores Socia Regionation Corpores Socia Regionation Corpores Socia Regionation 0.01 0.0-eners suff 0.02 0.0-eners suff 0.0-	0 C

Cost centers

When the customer wants to connect a cost center to a Space the cost center need to be available in the TSI cost center.

The Building administrator can create the list manually or via available SDI import sheets.

Cost ce	enters						Today 📓
No filter - click to	add or show filters		0 7	General Audit info			
Code	Contains	\$ Search	0 Q				
				Cost center			
Code	1.0			Code	010100		
	. Name			Name	Control & Accounting		
Cost centers (21)				Translated name			
10000	Finance			Language.Description	- Translation text		
10100	Control & Accounting			Deutsch	Control & Accounting		
nonon	Corporate Operational A	sta		English US	Control & Accounting		
10200	Treesury			Nederlands	Control & Accounting		
0000	Fiscal Affairs			Transferred to archive?	Cites	O No	
20000	Human Resources						
00000	Research & Development	4		Color and hatching			
00100	innovation			CAD Integrator color number			
90200	Manufacturing			CAD Integrator hatching			
40000	HCT .			CAD hatching preview			
50000	Procurement						
60000	Sales & Marketing						
60100	Marketing Communication	oms					
60200	Sales						
60201	Business Development						
70000	Legil Affairs						
80000	Health & Sefety						
80100	Risk Management						
90000	Corporate Real Estate						
00000	Facility Management						
110000	Maintenance Manageme	e-4		Remarks			

Define calendars

Discuss with the customer if there are different calendars required that hold different: The Building administrator can create the list manually or via available SDI import sheets.

- Working days
- Different start time & end time (e.g. opening hours of the building)
- Special dates (e.g. public holidays per country)
- Deviating hours (e.g. On weekdays opening hours are different than on Saturday)

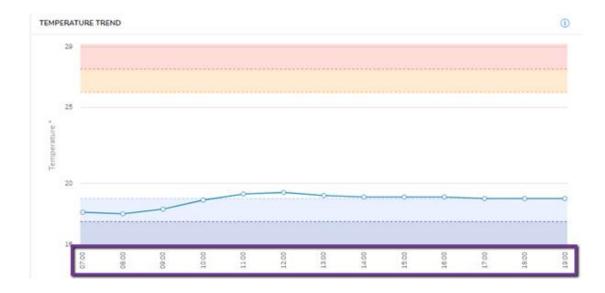
Based on discussions with customers, Calendars can be created manually.

The Company Calendar is used for the dashboards. It depends on the setting of the Company Calendar, linked to the building, for which hours in a working day the values are displayed in the Dashboard. For example, from 09.00 till 18:00 on Monday up to Friday. For a 24/7 company/building the working hours need to be set as:

- General start time: 00:00
- General end time: 23:59
- All days are a working day.

See the following sample Company calendar and result:

Calendars	Special dates	Deviating hours	
No filter	0 7	General Audit info	
Code Contains \$	Search 🔘 🔍		
CI		• Code	DC001
		Code group	DC001
Salendars Calendars		Name	Default Calendar
📓 01, Company Cale	ndar	Top level	
02, test calendar J	p	General working hours	
DC001, Default Ca	lendar		
		General start time	09:00
		General end time	18:00
		Type of day	
		Monday	Working day
		Tuesday	Working day
		Wednesday	Working day
		Thursday	Working day
		Friday	Working day
		Saturday	Non-working day
		Sunday	Non-working day



Data onboarding

Data onboarding

Users can be authorized for using Enterprise Talk. The data imported into or exported from Planon ProCenter, however, is not subject to authorization.

Enterprise Talk can be used to achieve the following objectives:

- To support a Planon ProCenter implementation process by importing data from legacy applications into Planon ProCenter.
- To interface Planon ProCenter with other applications by sharing information. For example, by interfacing a Financials Management system with Planon ProCenter, you could import invoice amounts as actual costs into Planon ProCenter.

One example of an Enterprise Talk definition that is available in the Edition is the PWE_onboarding.

With this Import definition you can import a large set of data related to:

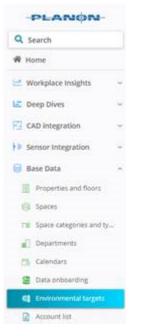
- City
- CostCenter
- Position
- Department
- SpaceCategory
- SpaceType
- SpaceStandard

- WorkspaceType
- UsrEmployee
- Occupancies

This list can be extended in the future, or a new definition can be created, for example to import measurement points.

Profile & targets

To be able to see the targets / margins on environmental readings and results the targets can be defined in this TSI.



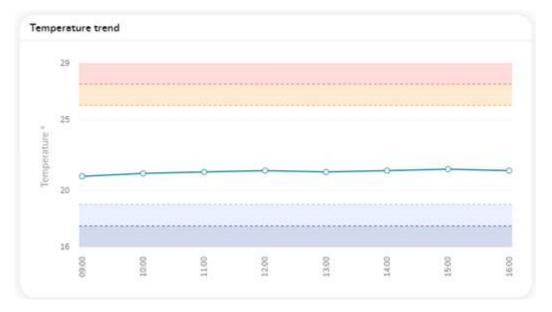
There is a default profile available, called INSIGHTS. When navigating to the **Target values** level you will find a predefined set of Environmental targets. Per target you can define/change the following:

- High
- Low
- Margin

See the following example for Temperature and the result in the dashboard:

General Au	dit info	
General		
Environmental pr	INSIGHTS, Insights profile for deep dive ch	i
Measurement poi	Temperature	6
High	22	
Low	20	
Margin	2	

Result:



Themes

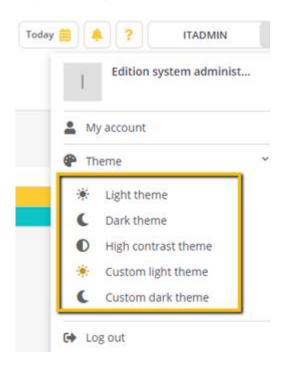
Create custom themes and branding logo.

Themes settings:



- Custom theme activated
 - When set to **Yes** all the created settings will be available. The user can choose the preferred theme.
- Primary color of custom theme
 - The chosen color will be used in different areas
- Secondary color of custom theme
 - The chosen color will be used in different areas

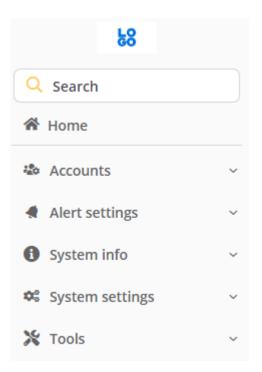
When set and active the user can choose between the following themes, meaning the original settings stay intact and available (use the non-custom theme to go back to the original theme):



Themes logo

Here it is possible to upload a customer logo that is available when printing and for the different themes. It can be that different color logos are required when using a dark or light theme.

When theme is activated, the Logo will appear in the top left corner:



Users

This is a web form that is made available to create and modify users in a different way. The principle is the same as the **Users** tab in the TSI **User groups**. You can search for, add or edit users.

Planon	User grou	ups				today 🚞		? ITADMIN	
Q Search	User groups	Users	User settings						
R Home			con proof ed.	_					
& Accounts	 No froe - cloi to and or 	PHO T	General					User settings	- 40
D Our groups	C User Uner name	-1	• Our	1730408, Billion system admi			0	+ 448	
d lines	C User settings (1)		Trensator Frence: ProCenter Language	fine English US	0.40		C	C Certaerscens	enp
 Alert settings 	TACMEN		Use 24-hour notation Displayed unit of length	O 195	(C No.			Report	- 53
O Systemielo			Reply email address				8	B feport	
OC System settings			Serder's enel address Bro email address				0		
🛪 Tools	-		Conserts email address Autorest first term in lat	C. YM	O to				
			• Thema	1, Paron Light			8		
								-	_
	Court A/ Non	•						Center	-

Alerts settings

If you have created multiple Alerts TSIs in your navigation panel, you can specify in **Alert settings** to which **My alerts** step you want users to navigate when they click the

active **Alarm** button on the Planon toolbar. In Planon Workplace Edition, this is default set to **My alerts**.

My alerts

If there are any alerts created and linked to you as a user, you can find the alerts here. When there is an alert in your screen (top right) you can click on the alarm bell, and you will be redirected to **My alerts**.

I foo fitter - chox to add or all-ow fitters	0.1	General				Alarm statuses	1.0
Cose I Contains I Swett.	0 Q					A Ston results	
σ	A Nevigation filter active	. 107	s Tr				
1-1 Promy 18. 14. 15. [Code	Destruction.	· Coox	MP lissues			Report	
ONert Datas (1)		Description				Report	
Ф 1 Ф 🗢 бе малин		· forward	C. Yes	O No			
and the set of the set		Forward to:					
		 Ringing 	O 141	0.90			
		e Snoose	C. 746	O No			
		Snooped umil	2.		at		
		Alart condition	MRD1, Measurement	point - Increase all a			
		bits n.m. of elements	77				

When there is an alert, you can see or do the following:

- You can view the alert (code and description)
- You can forward this alert and define to whom you want to forward it to.
- You can snooze the alert and define until when.
- You can check what the alert conditions are (why is this alert activated?)
- You can also see the number of results related to this alert.

Index

A

Accounts 25 Action on selection 16 Add CAD business objects 131 Add CAD Business Objects 93 Alert settings 29, 170 Alerts 29 Alerts settings 29 Announcement 114 AppCenter 147 Archive 12 Area per person by building 47

В

Background actions 33 Base data Building admin 149 Front desk 118 Reservations 109 Booking analytics 103 Bookings 101 Bookings to be approved 51 Building administrator 125

С

CAD business object mapping 94, 131 CAD colors & hatchings 100 CAD import definitions 136 CAD Inbox 129 CAD Integration 129 CAD Integration 91 Calendars 108 Cities 108 Concepts PWE 12 Cost centers 164 Create drawing definitions 130

D

Dashboard General 52, 126 Data onboarding 166 Deep dives 54, 128 Default personnel assignments 118 Default vendor assignment 119 Define calendars 164 Department 163 Desk booking stats 103 Desk setup types 110 Desk utilization 105 Disk 22 Drawing & floor Mapping 98 Drawing definition 92

Ε

Enterprise Talk 44 External visitors 119

F

Facilities 110 Facilities issues 116 Field mapping 133 Filters 18 Front desk 114

Η

Home 46 Environment management 21

I

Immeasurable 148 Import definitions 96 Inbound (raw) messages 147 Insights dashboards 126 Introduction Planon Workplace Engagement 9 IP Whitelisting 24

K

Kiosk & Booking panel 43 Licenses 42

L

Licenses 35 Log viewer 33 Logs 23

Μ

Mapping options 76 Measurement units 120 Modify within selection 14 Move capacity 87 Move settings 90 Moves 87, 87 My alerts 111, 123, 171

Ν

Net area per department 47 Non-bookable periods 110

0

Order groups 120 Organization Addresses 121

Ρ

Personnel 66 Moves 87 Planon Workplace Insights Dashboards 52 Power users & User groups 10 Priorities 121 Profile & targets 167 Profiles & targets 84 Properties & floors 149 Property picklist 109

Q

Quick search 18

R

Reference date 12 Reporting 13 Reservation picklist 110 Reservations 100 Room booking stats 106 Room layout 111 Room utilization 107 Run import 98

S

Scheduled tasks 35 Sensor integration 140 Sensor management 140 Locations 77 Sensor management Connectors 77 Event logs 77 Measurement point types 77

Measurement points 77 Sensor monitoring 77 Service deks Home 112 Service desk 112 Space & occupancy 55 Space & Reservation manager 46 Space & workspaces 55, 150 Space by space standard Net area & count 47 Space category & type 161 Space data 107 Space picklist 109 Spaces by space type net area & count 49 **SSO 24** Standard orders 122 System administrator 21 System info 33 System settings 34

Τ

Templates 45 Themes 40, 168 Threshold values 99 Tools 44

U

User groups 25 User sessions 34 Users 28, 170

V

Visitor log 112, 116

W

Workspace type 109, 163