# Power users

Planon Software Suite

Version: L100

Planon

Building Connections

# 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

| | |
|---|---|
| | 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

# 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.

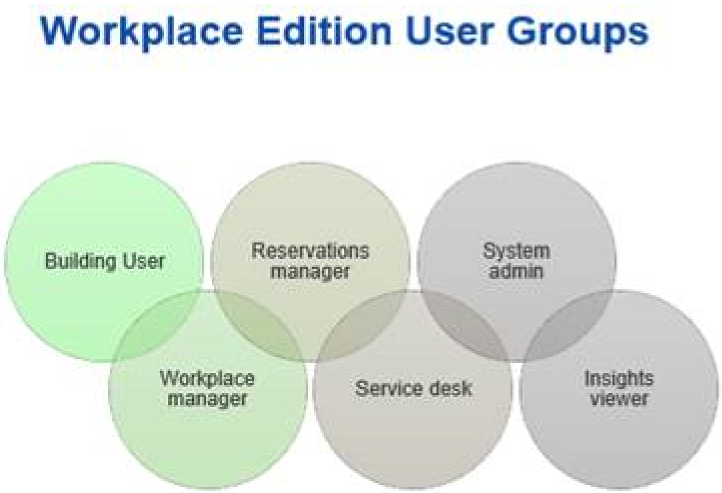
Building users are excluded from this document, because they do not maintain any data - they make efficient use of what the Power users maintain in the application.

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:





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.

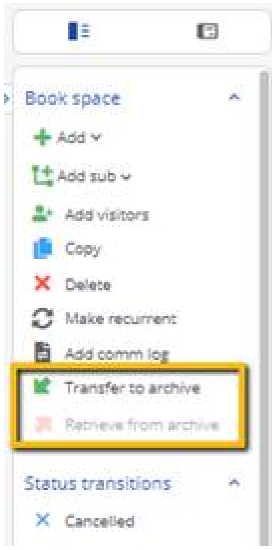

The reference date is set via the **Reference date** button in the Planon toolbar. By default, the reference date is the current date, and it is activated.

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.

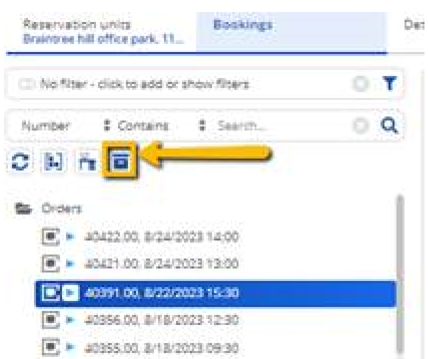
You can always archive or retrieve from the archive.

---

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.

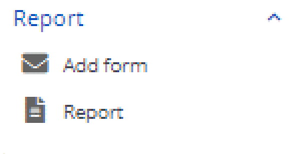
---

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.




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

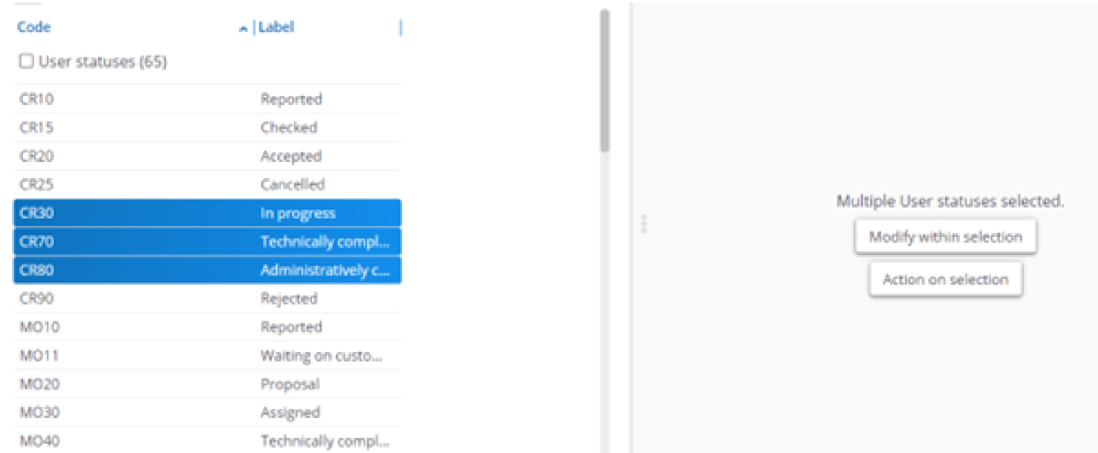
For more information about Reporting, we recommend to read the user manual, available via the **Planon Customer Portal** > **Product download**, or you can request it from your Planon contact.

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.

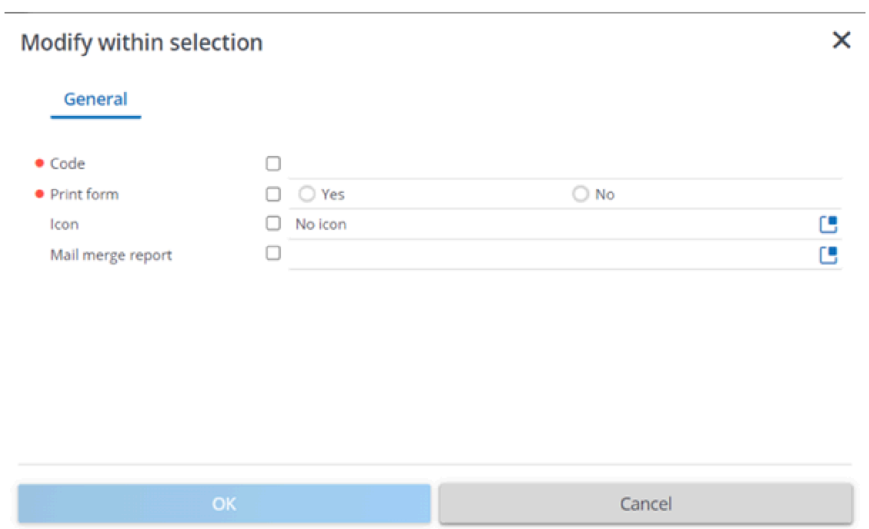
This option becomes available in the data panel when you select multiple elements in a TSIs selection level. You can change the values of all fields.




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

1. 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**.




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.

6. 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

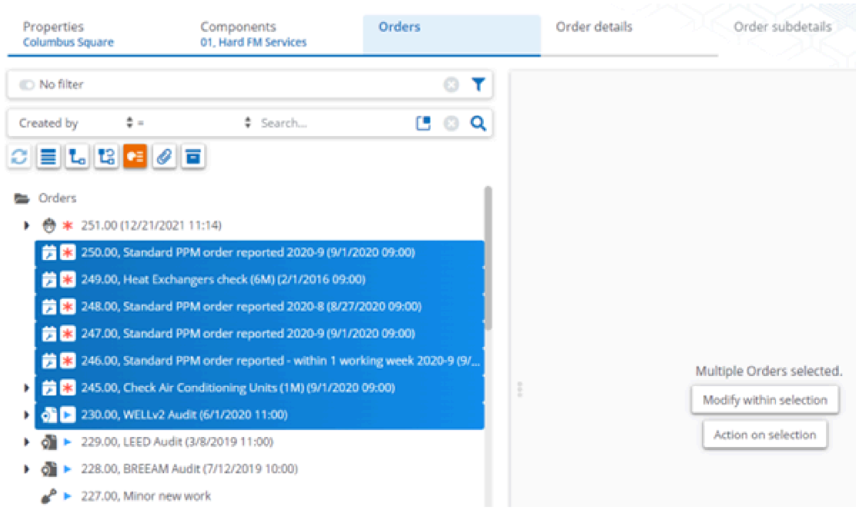
The **Action on selection** option allows you to perform a certain action or status transition for multiple elements at the same time.

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

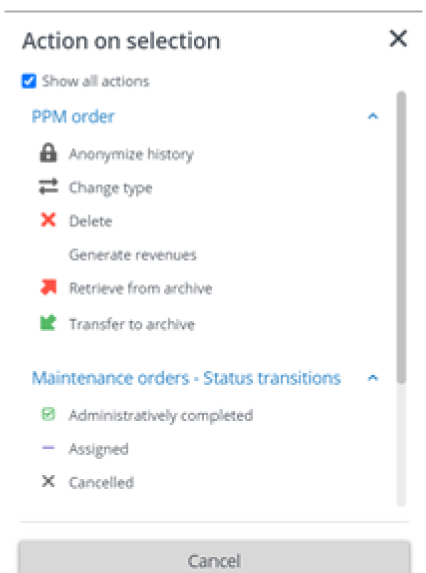
1. Select multiple elements to which you want to apply the action or status transition.



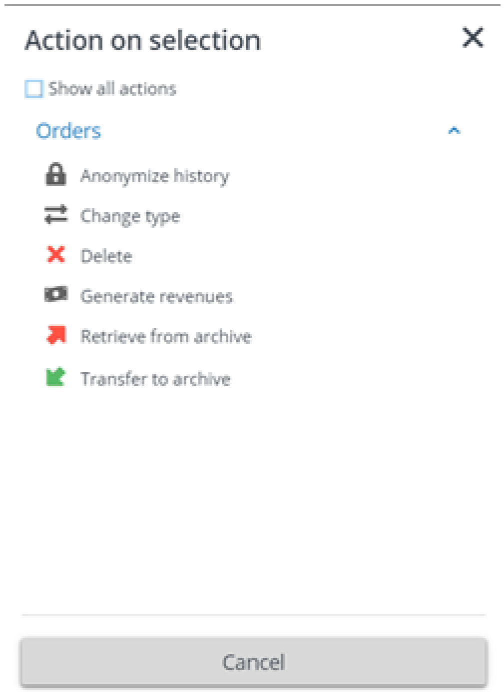

2. On the data panel, click **Action on selection**.

   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.




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.

4. 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.

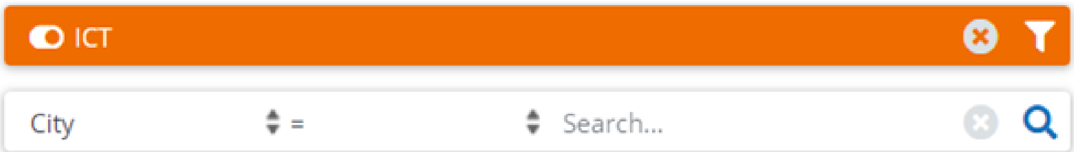
# Filters & Quick search

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




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.

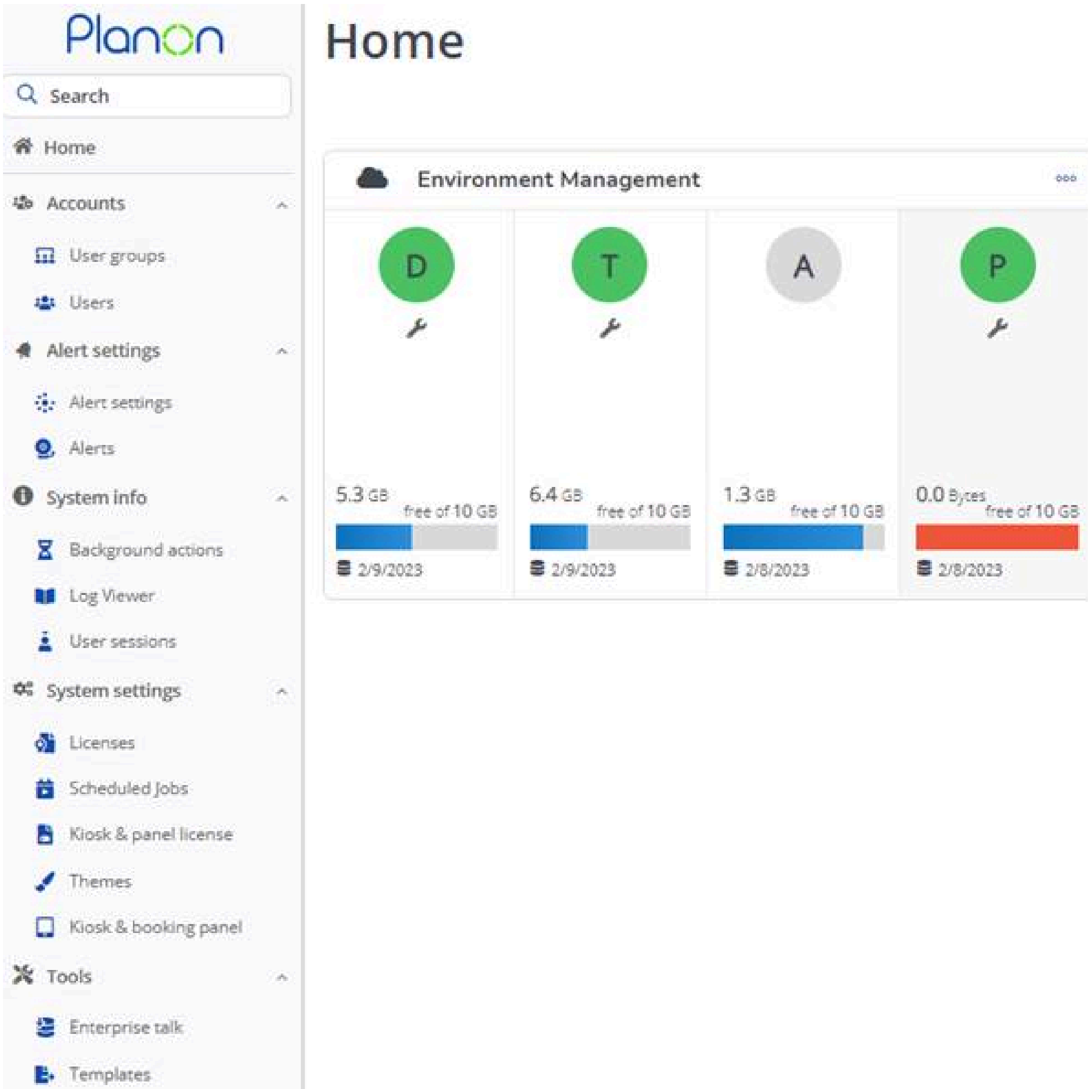
The following table describes the search operators in detail.

| Operator | Description |
|---|---|
| <, ≤, =, ≥, ><br><>, <> or empty | Logical operators that compare the search field 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.<br>H_t finds: Hat, Hut, Hit. |
| Contains<br>Does not contain | Operators that search for the presence of the search value in the search field. |
| Contains a value<br>Does not contain a value | Operators that search for the presence of any value in the search field. |
| Starts with<br>Does not start with<br>Does not start with or is empty | Operators that search for the presence of the search value at the beginning of the search field. |
| Ends with<br>Does not end with | Operators that search for the presence of the search value at the end of the search field. |

| Operator | Description |
| --- | --- |
| Does not end with or is empty | |
| In<br>Not in<br>Not in or empty | Operators that search for the presence of a set of search values in the search field. |
| Between | Operators that search for a range of values in the search field. It includes both the start and end values.<br><br>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:



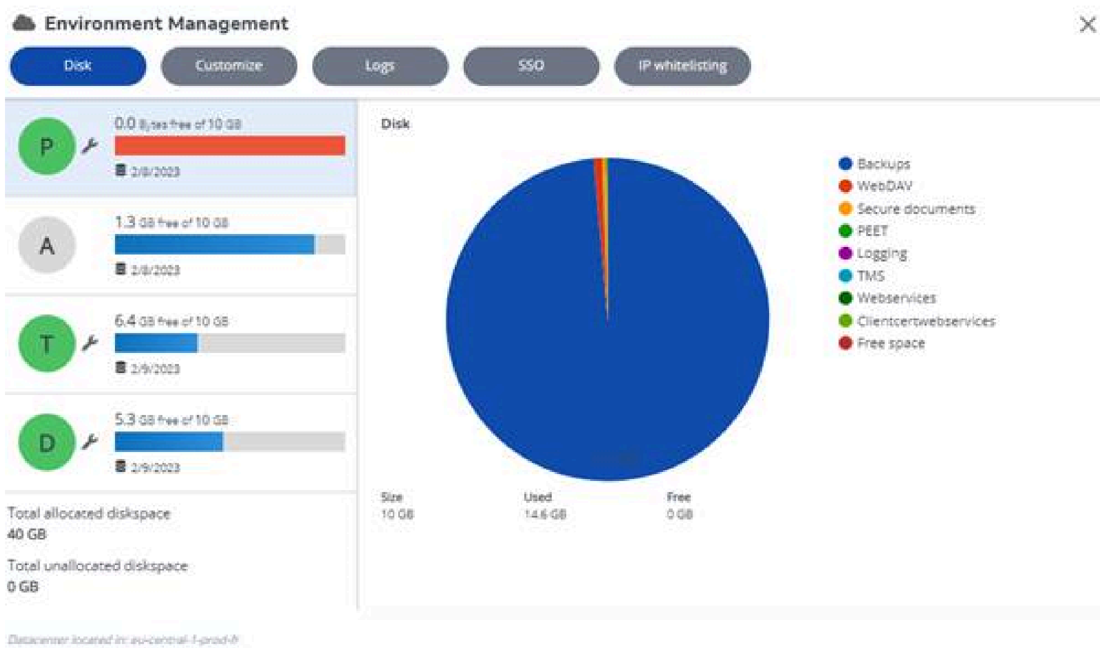

The navigation panel displays a set of Navigation groups with a set of Navigation group Items. In the following paragraphs each Navigation group and the related Navigation group items will be explained.

## 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.

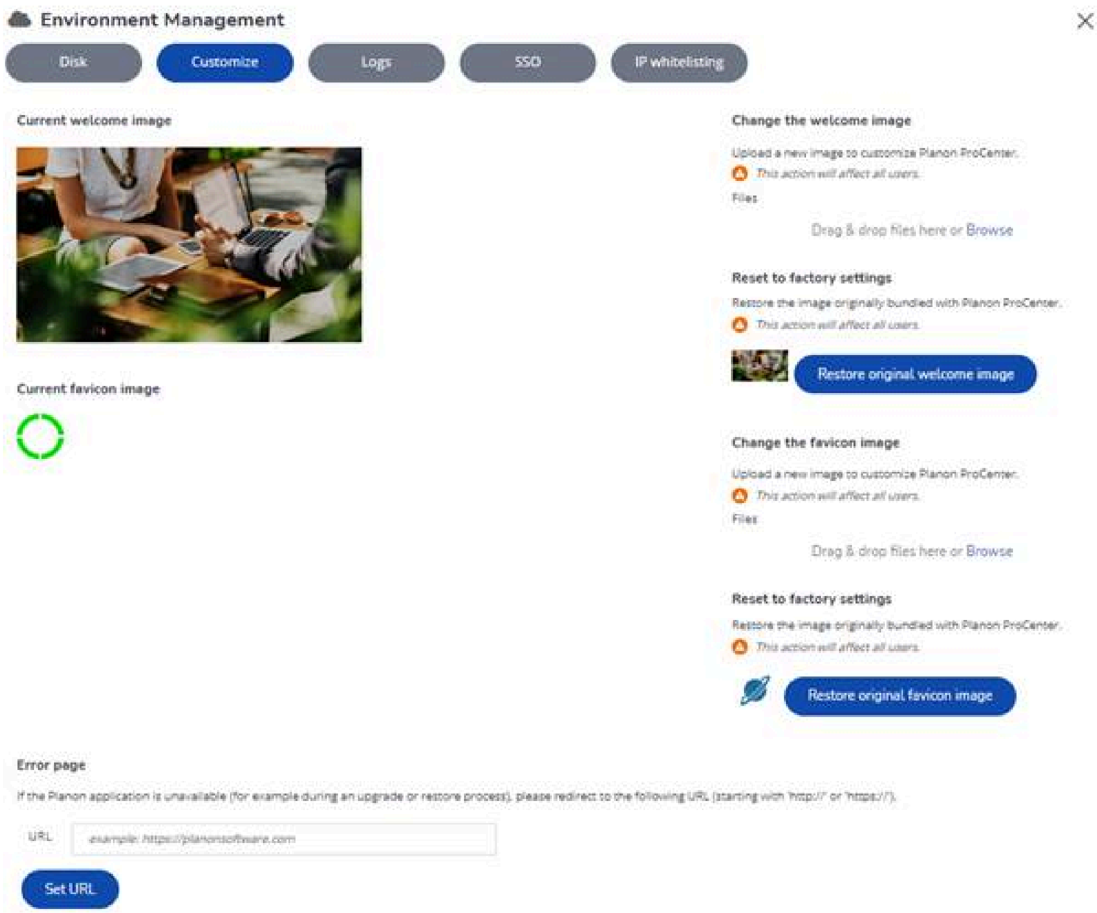
# Disk

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



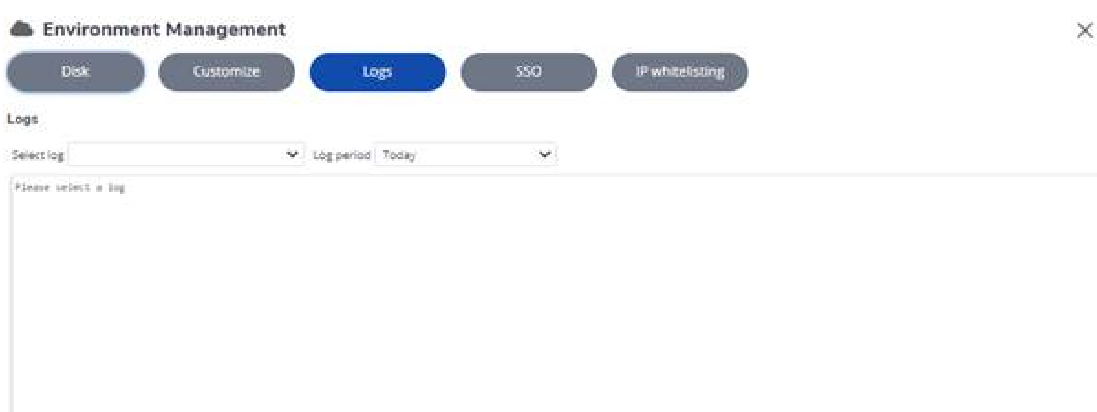

On the tab **Customize** you can make changes or reset to factory settings related to:

- 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://').



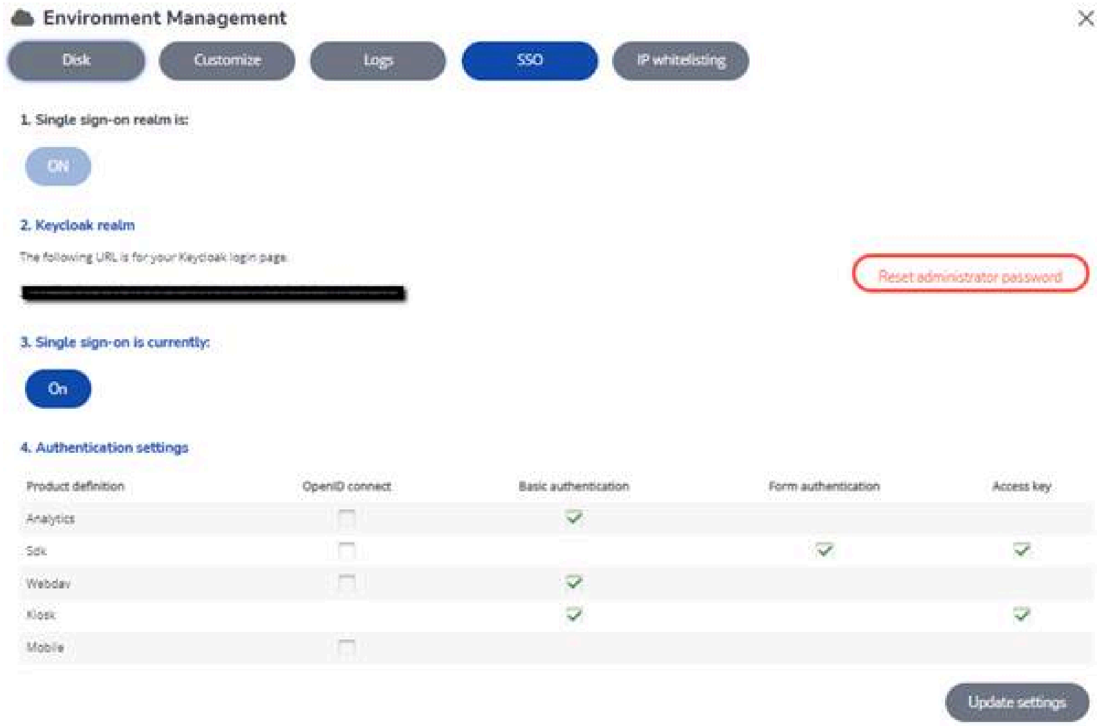

# Logs

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.

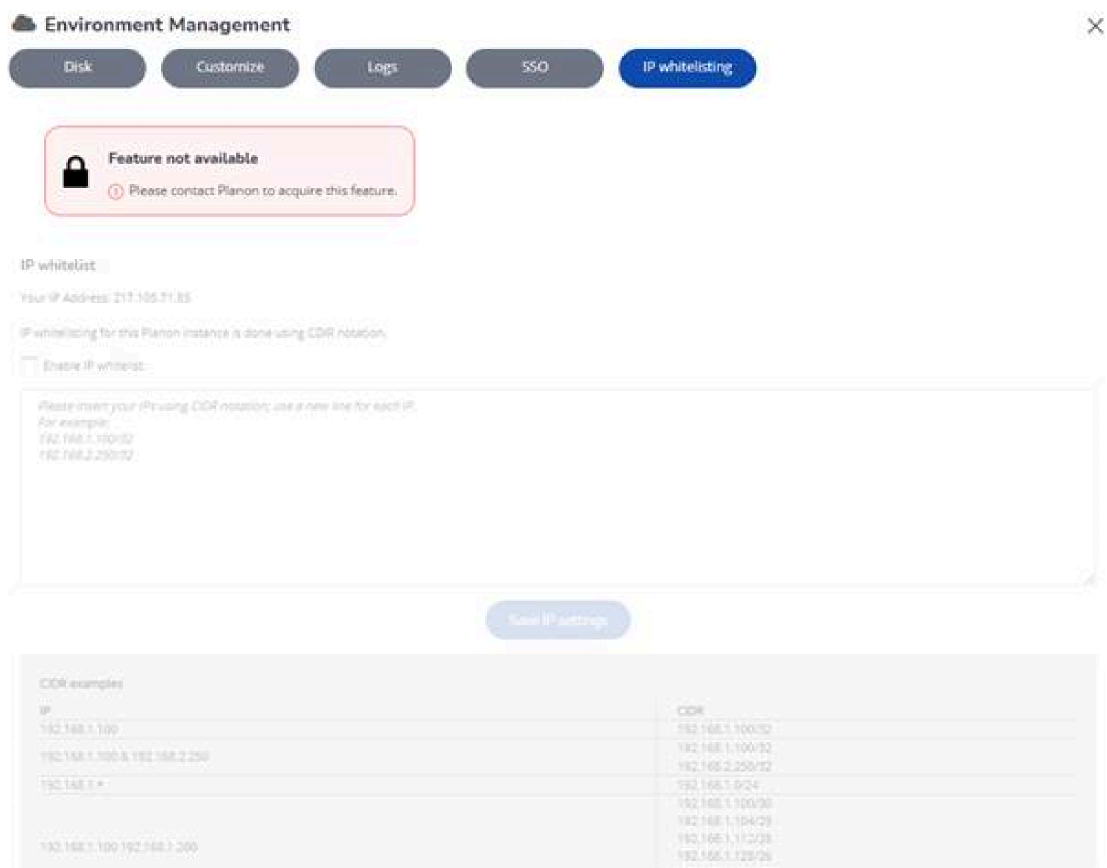


# SSO

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




# IP Whitelisting



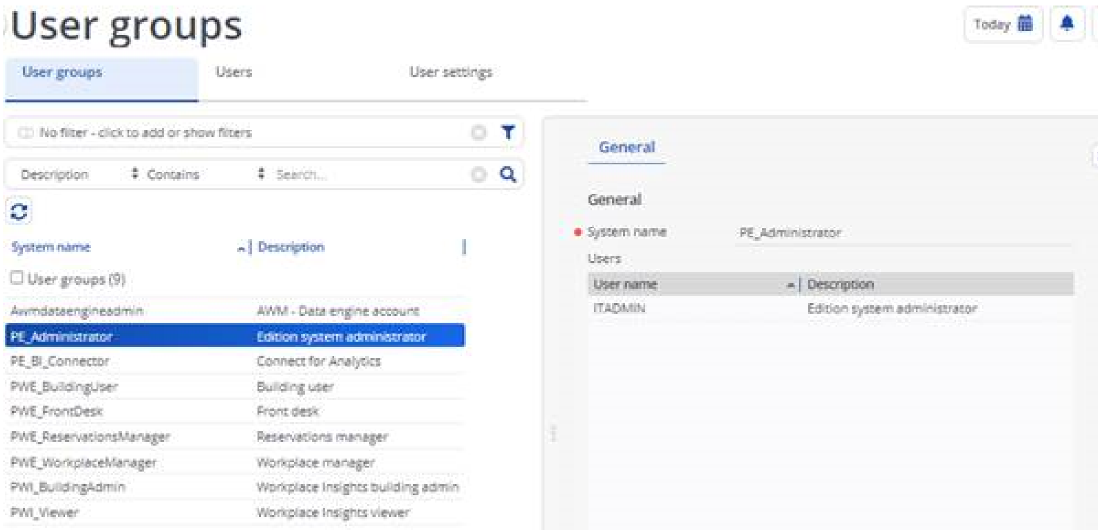

# Accounts

*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:




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).

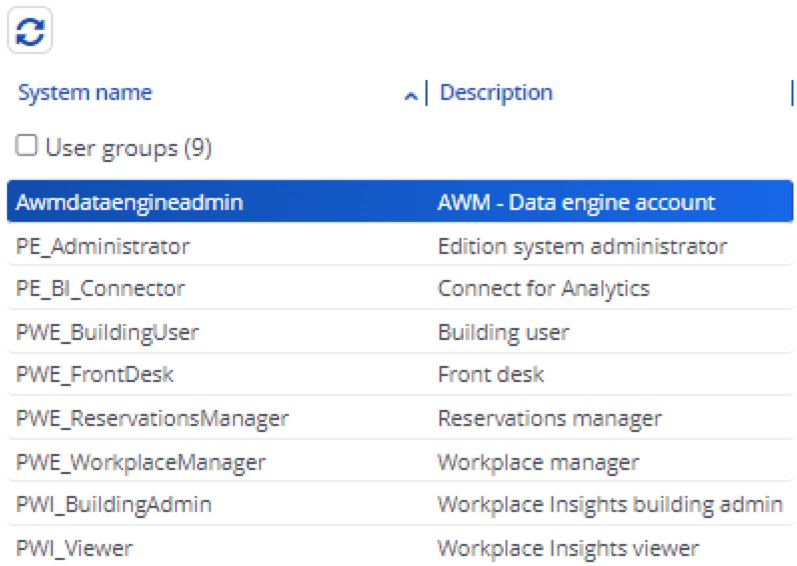
After creation of the user press save. Now a person (personnel list) can be linked to the user. Also 1 or more user groups can be linked.

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

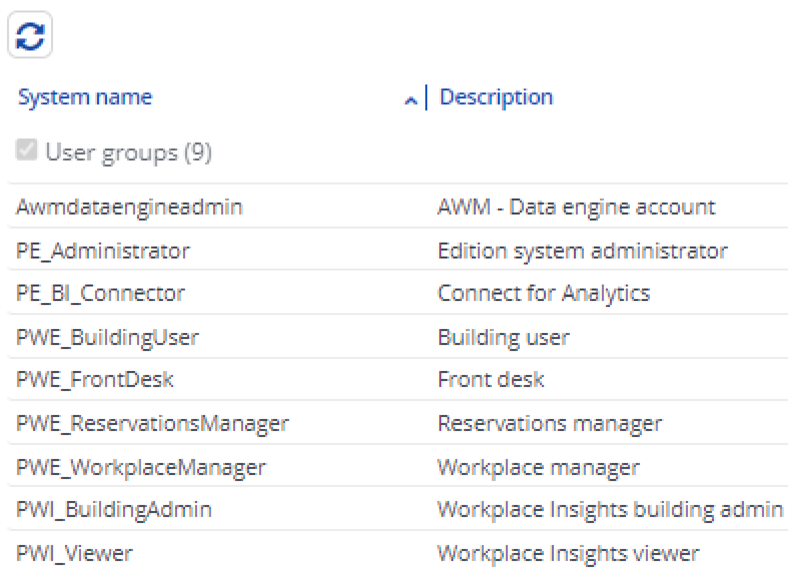
- Language (English US or German are the current choices)
- The hour notation (24-hour notation or not)
- The displayed unit of length. Options are meters or feet. When the user, with unit of length is feet, all measurements, for example in space management, are in square feet or feet. This is auto calculated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

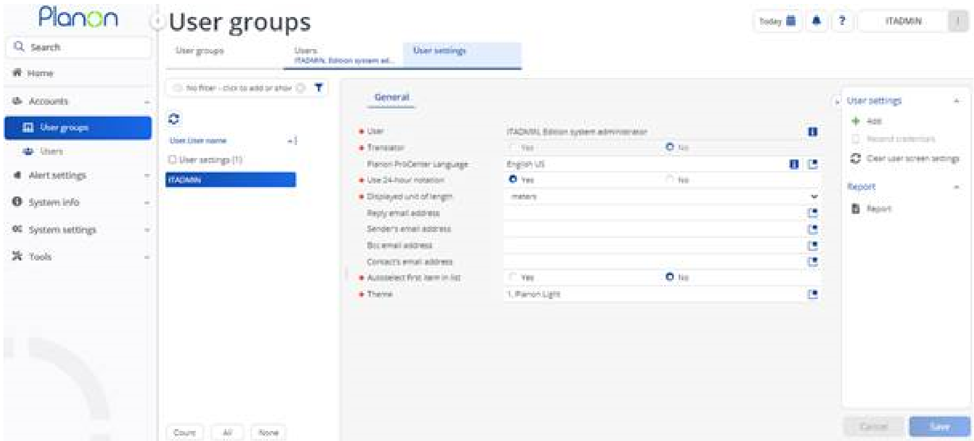
For example, **Yes**:



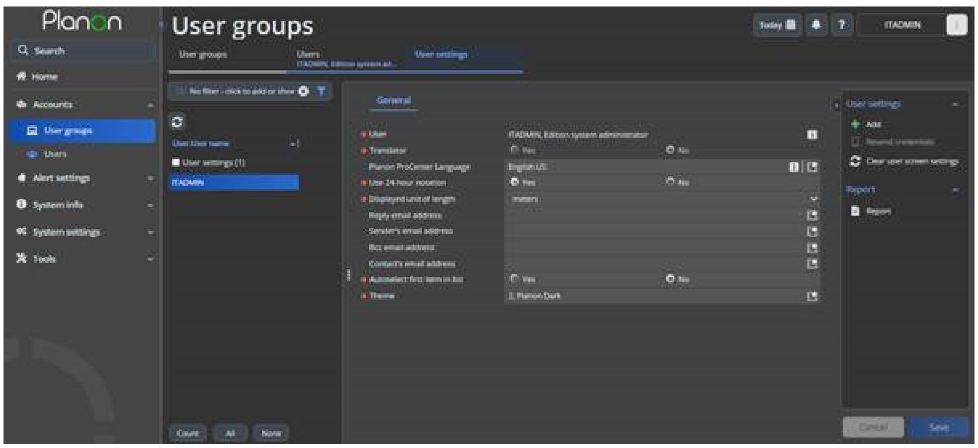

For example, **No**:



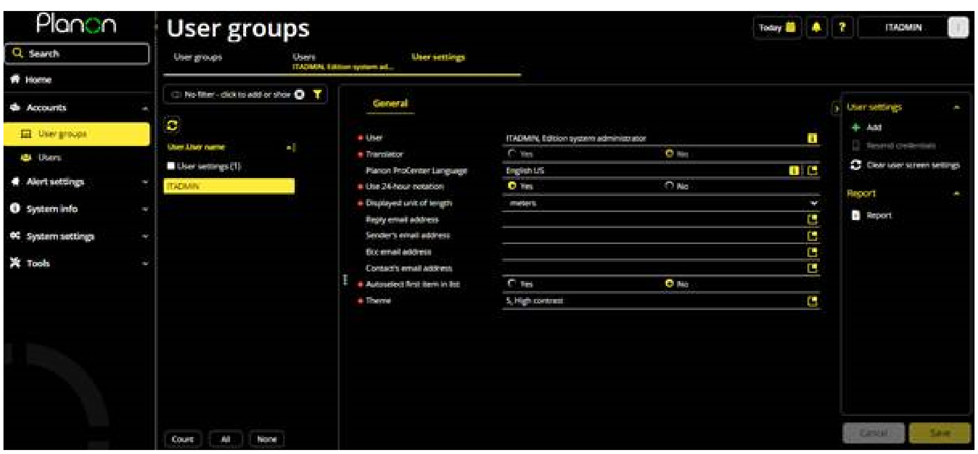

- Theme changes the look:
  - 1– Planon Light




- 2 – Planon Dark

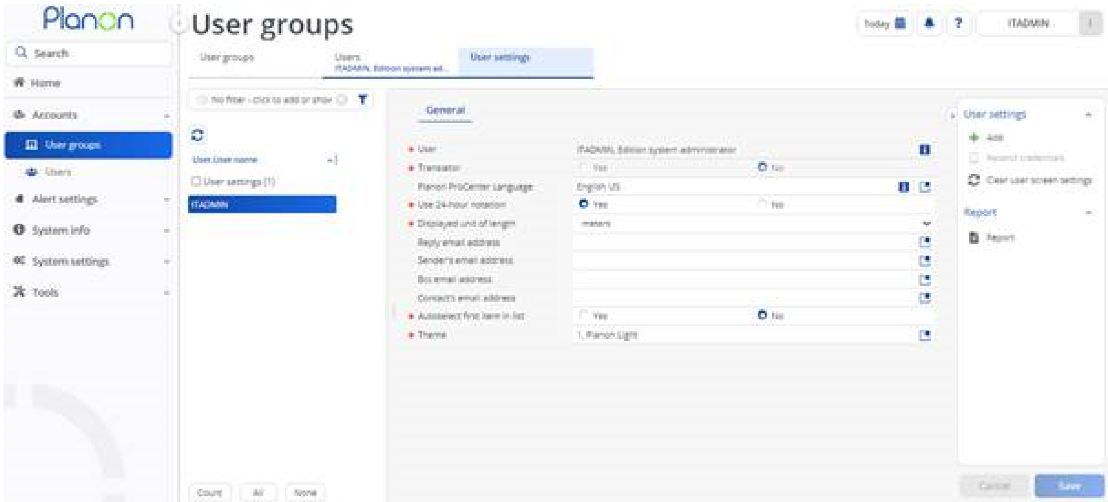



- 5 – High contrast




# 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.




# 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

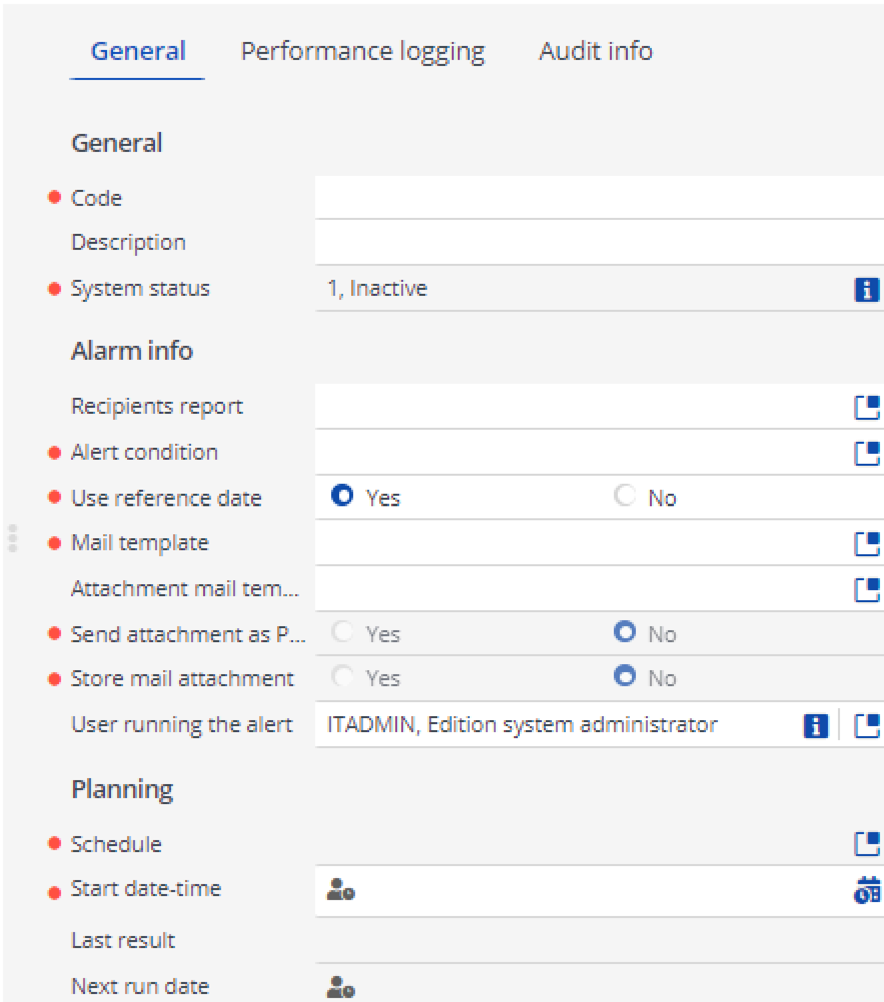
The Alerts TSI allows you to specify alarms and notifications for an action that is to be completed at a set time. Alerts uses data added in other TSIs. This is dependent on the business object for which the notification is selected.

### 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:




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.

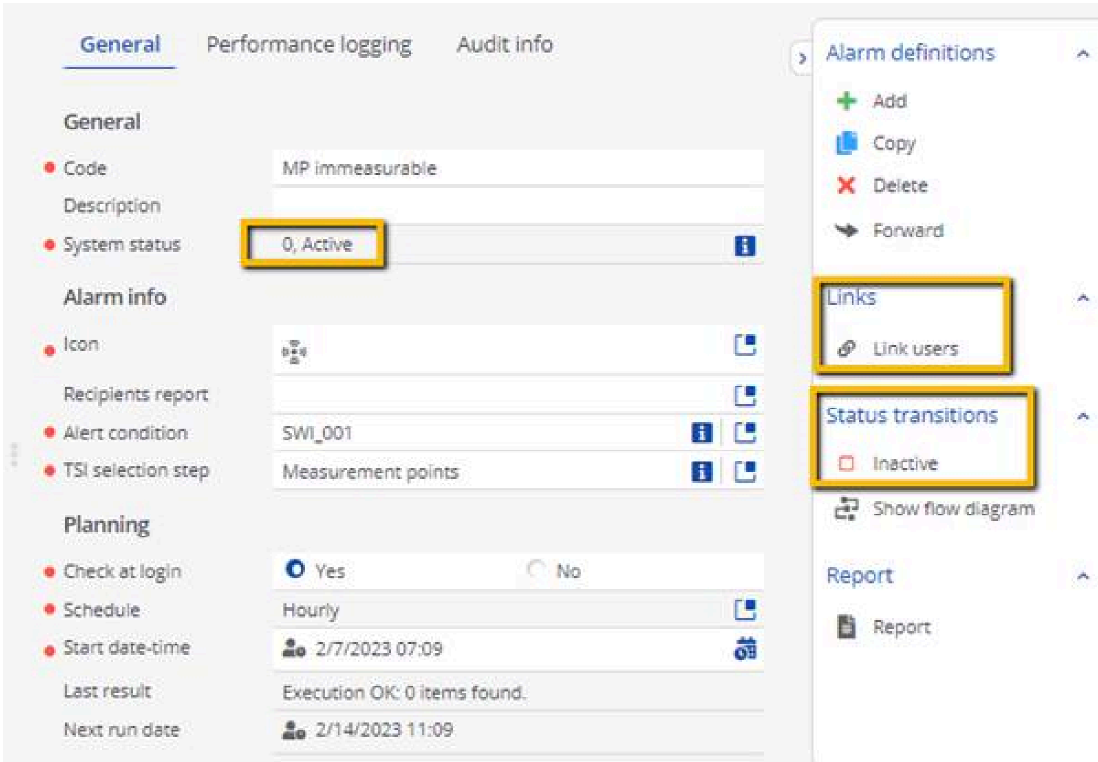
In Alerts, alarm definitions are added and maintained at **Alerts** > **Alarm definitions**.

See the following example of an alarm definition:

---

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

---



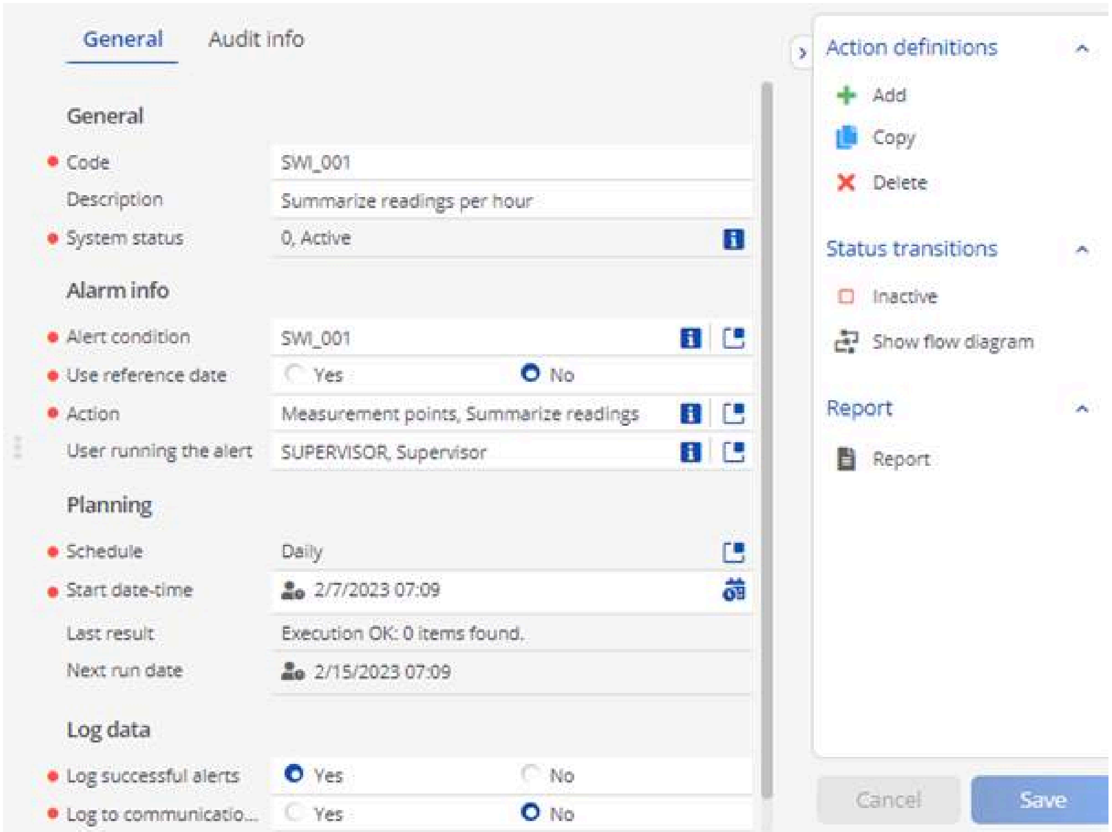

## Action definitions

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

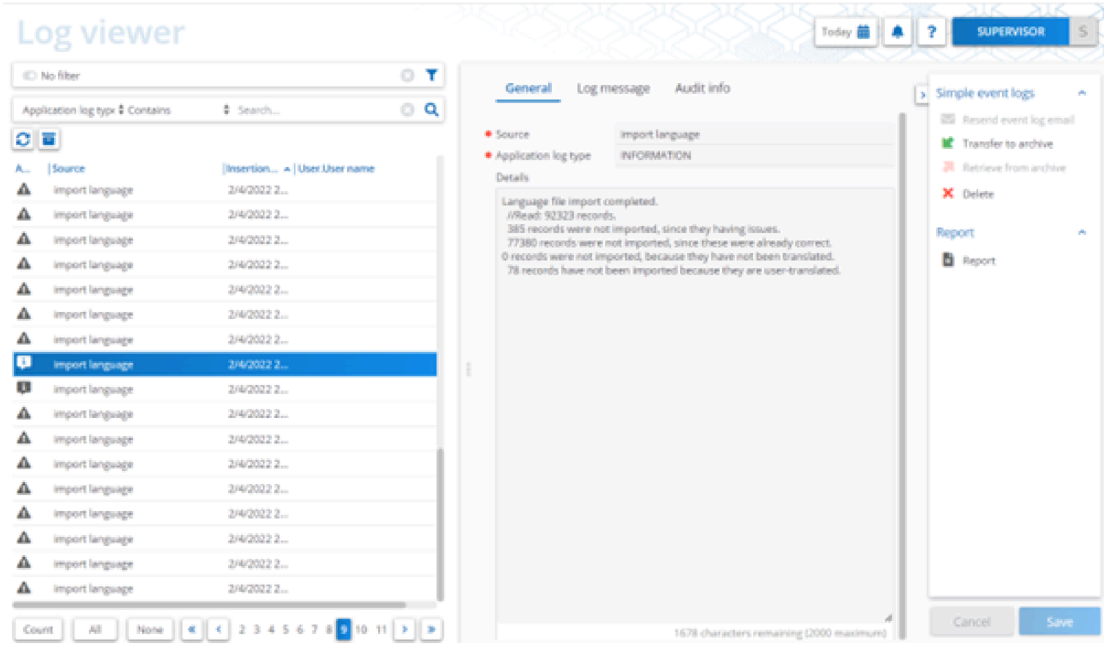


## Background actions

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.




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

*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

User only have *read rights* on this TSI.

## 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.

| Scheduled task | Description | Used in |
|---|---|---|
| SYSACTIONS | Triggers Action tasks | Alerts and Notifications |
| SYSALARMS | Triggers Alarm tasks | Alerts and Notifications |
| SYSAWMSUMMARIZEREADINGS | Summarizes measurement point reading (daily, weekly, monthly) | Agile Workplace Management (AWM) |

| Scheduled task | Description | Used in |
|---|---|---|
| SYSBACKGROUND_ACTION_CLEANER | Cleans up background actions.<br>In general, data is deleted when in status *Completed* or *CompletedWithErrors* and *SysChangeDateTime* is older than 7 days.<br>For PMFS and AppSuite, data is deleted only when in status *Completed* and *SysChangeDateTime* is older than 7 days. | Planon application<br>PMFS / AppSuite |
| SYSINBOUNDMESSAGE_CLEANER<br>SYSINBOUNDRAWMESSAGE_CLEANER<br>SYSOUTBOUNDMESSAGE_CLEANER<br>SYSOUTBOUNDRAWMESSAGE_CLEANER | System tasks for cleaning up data related to inbound & outbound messages.<br>Deletes processed messages older than *1 day*.<br>Processed means messages with the status:<br>•BOInboundRawMessage: *Transformed*<br>If there are Inbound raw messages with status *Failed* or *Queued* with the same message ID, they are skipped from deletion.<br>•BOInboundMessage: *Processed*<br>If a business event references an inbound message, it is skipped from deletion.<br>•BOOutboundRawMessage: *Sent* | Event Connector |

| Scheduled task | Description | Used in |
| --- | --- | --- |
| | •BOOutboundMessage: *Transformed*<br><br>If there are outbound raw messages with status *Failed* or *Queued* with the same message ID, they are skipped from deletion.<br><br>In addition, this task also deletes *Failed* messages for these business objects that are older than the Data cleaner setting (default: 91 days). | |
| SYSEVENTLOG_CLEANER | Cleans simple event log and linked event log entries.<br><br>Data is deleted when *SysInsertDateTime* is older than 7 days. Data is deleted in chunks of 100 records.<br><br>Orphan child records and all orphan records in PLN_EVENTLOG_BUSINESSOBECT are deleted in chunks of 10.000.<br><br>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. | Planon application |
| SYSEXCHANGEAPPOINTMENTTOOS | Triggers synchronizing **Connect** | Exchange |

| Scheduled task | Description | Used in |
|---|---|---|
| | for **Outlook** (Exchange) appointments | |
| SYSEXCHANGESYNCLOGCLEANUP | Triggers cleaning **Connect for Outlook** synchronization logs | Exchange |
| SYSMOBILEFIELDSERVICES | Triggers action to receive messages from **PMFS Movilizer Cloud** | PMFS |
| SYSUPDATE_LFC_SNAPSHOT_DATALAKE | Triggers a daily 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_ERROR | Detects 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".<br><br>When starting this task, a warning message appears, see: Multi-gear. | Planon application |
| 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 |

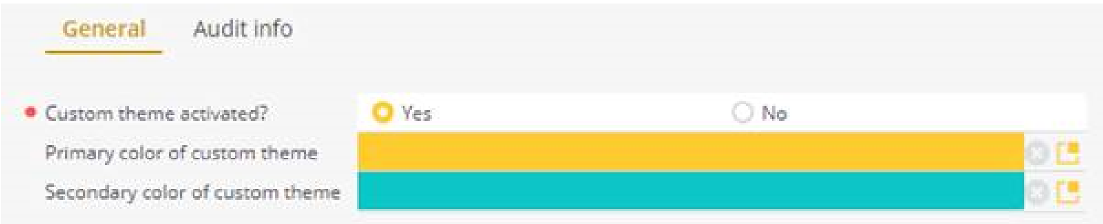
| Scheduled task | Description | Used in |
|---|---|---|
| | action for PMFS AppSuite. | |
| SYSPMFS_CHECKER | Triggers automatically retrying of failed background actions for **PMFS Movilizer** | PMFS |
| SYSPPM_SCHEDULED_PROFILES | Triggers the generation of PPM orders | PPM |
| SYSSESSIONDATA_CLEANER | Deletes old session data (older than 7 days). | Planon application |
| SYSSUBSCRIPTIONCHECKER | Subscription checker Connect for Outlook | Exchange |
| SYSTASK_CLEANER | Triggers cleaning tasks.<br>Data is deleted when in status *Notified*, *Executed* and *LastStateChangedDateTime* is older than 7 days.<br>The task will run using an SQL statement for better performance. | Alerts and Notifications |
| 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_CLEAN_JOB | Triggers cleaning the mail reports | Connect for Calendars |
| SYS_C4C_REMOVE_OBSOLETE_JOB | Triggers removing the outdated tasks | Connect for Calendars |
| SYS_APPS_CHECK_FOR_UPDATE | Checks 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.<br><br>Do not deactivate this task! | AppCenter |

## Themes

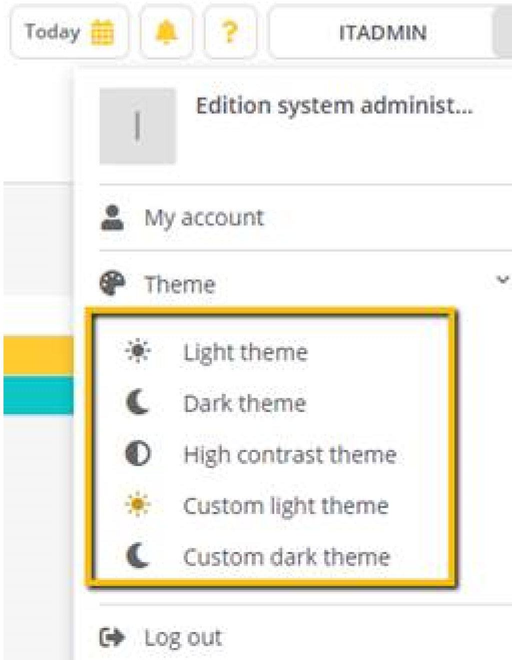
Create custom themes and branding logo.

### 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

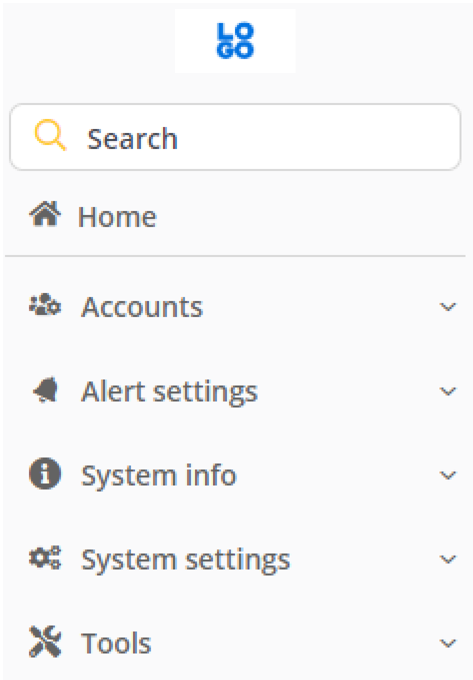
When set and active the user can choose between the following themes, meaning the original settings stay intact and available (use the non-custom theme to go back to the original theme):




## 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.

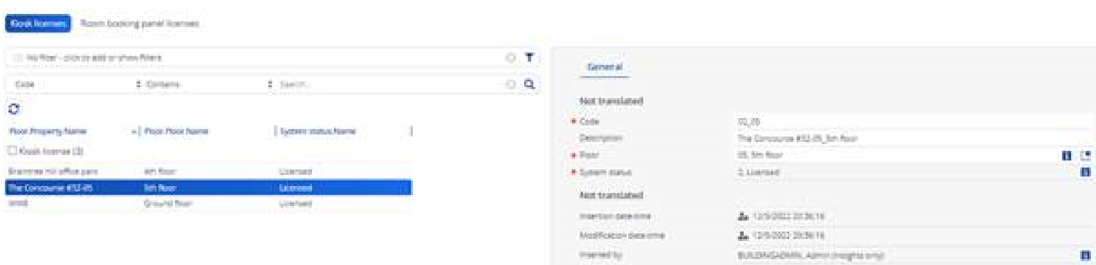
When theme is activated, the Logo will appear in the top left corner:



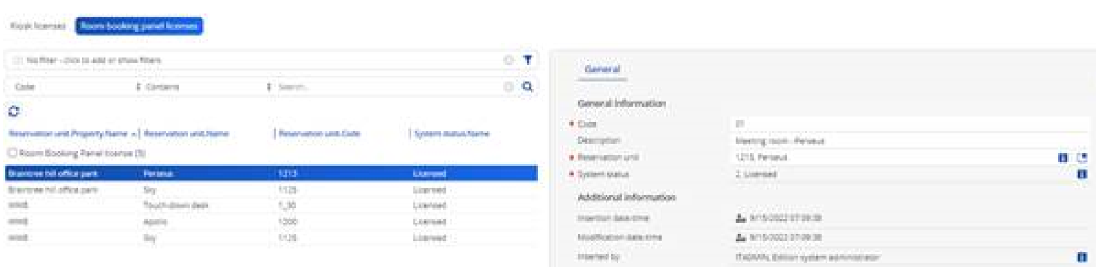

## Kiosk & panel license

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.



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

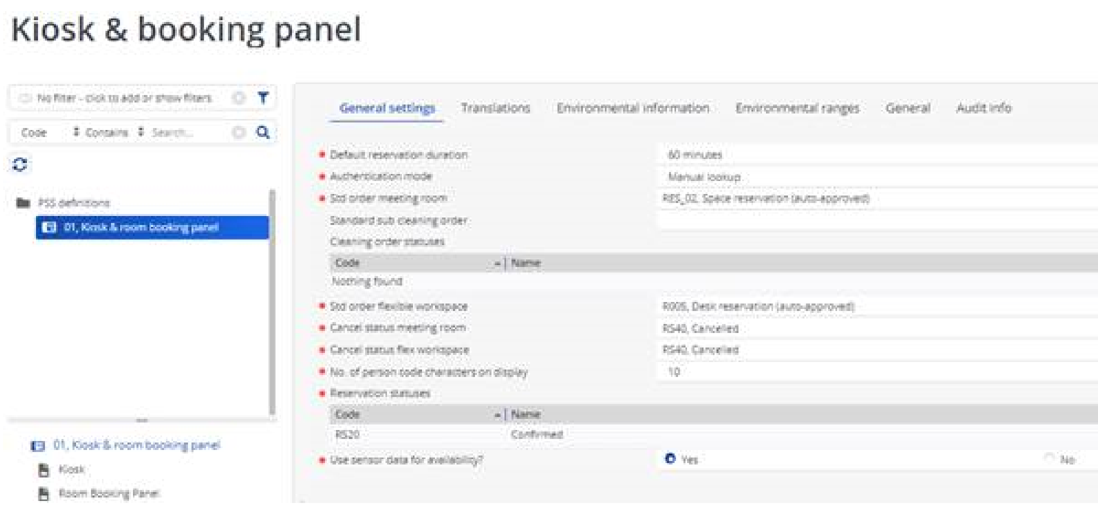


# Kiosk & booking panel

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

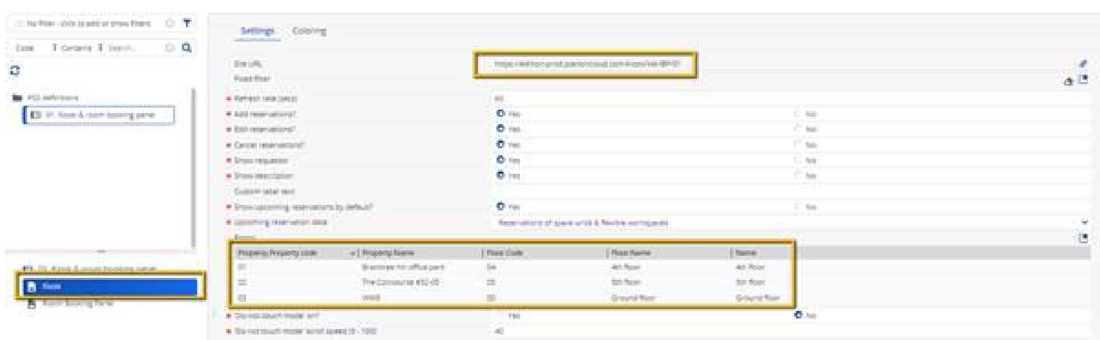
First, you need to have a general definition and then you will be able to access the specific settings for Kiosk and Room booking panel. This definition is already available.

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




## 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.



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

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

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:

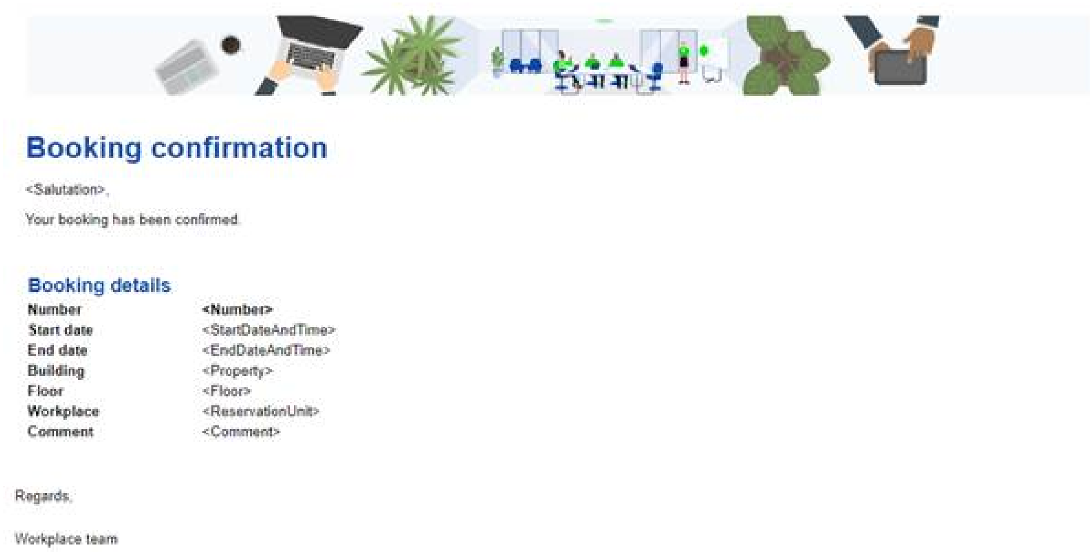
- City
- CostCenter
- Position
- Department
- SpaceCategory
- SpaceType
- SpaceStandard
- WorkspaceType
- UsrEmployee
- Occupancies

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**



### Booking confirmation

<Salutation>,

Your booking has been confirmed.

#### Booking details

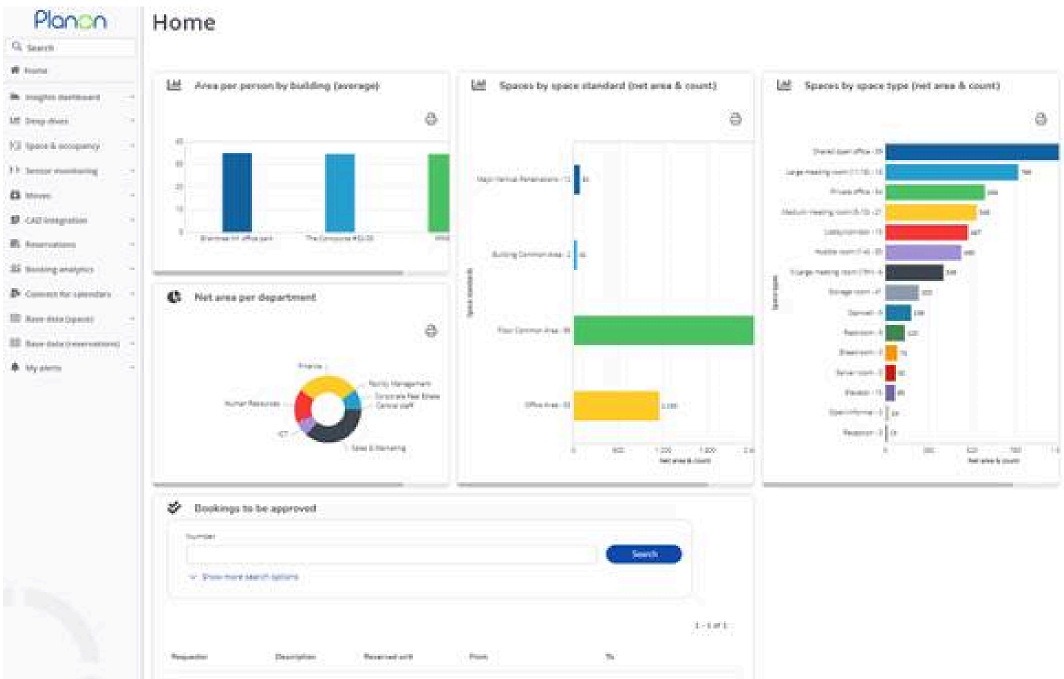
| | |
|---|---|
| **Number** | **<Number>** |
| **Start date** | <StartDateAndTime> |
| **End date** | <EndDateAndTime> |
| **Building** | <Property> |
| **Floor** | <Floor> |
| **Workplace** | <ReservationUnit> |
| **Comment** | <Comment> |

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)*

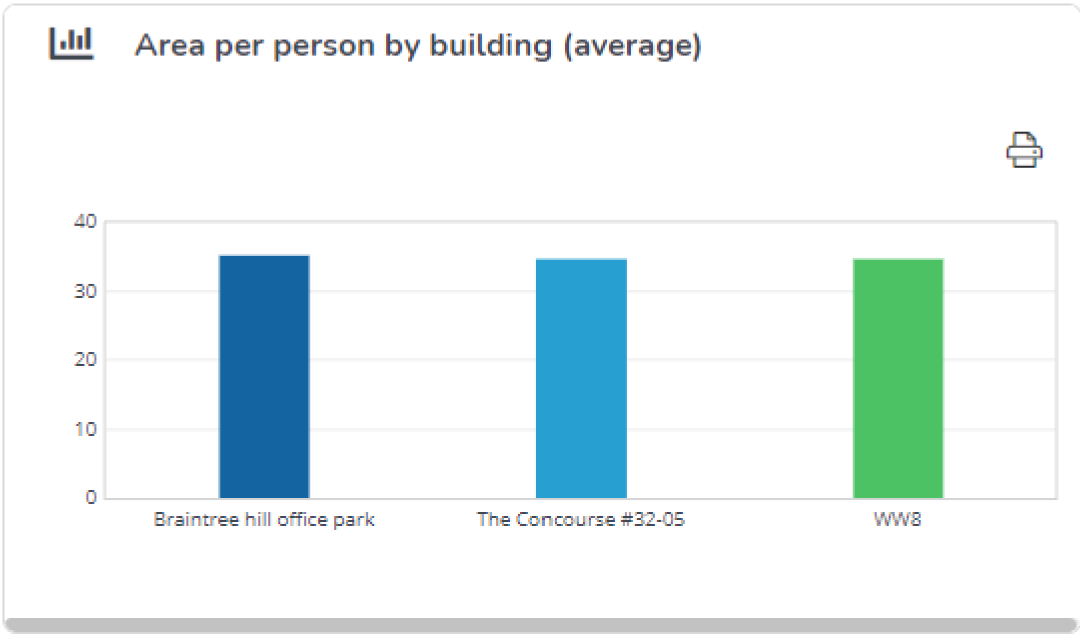
*Net area per department*

*Spaces by space standard (net area & count)*

*Spaces by space type (net area & count)*

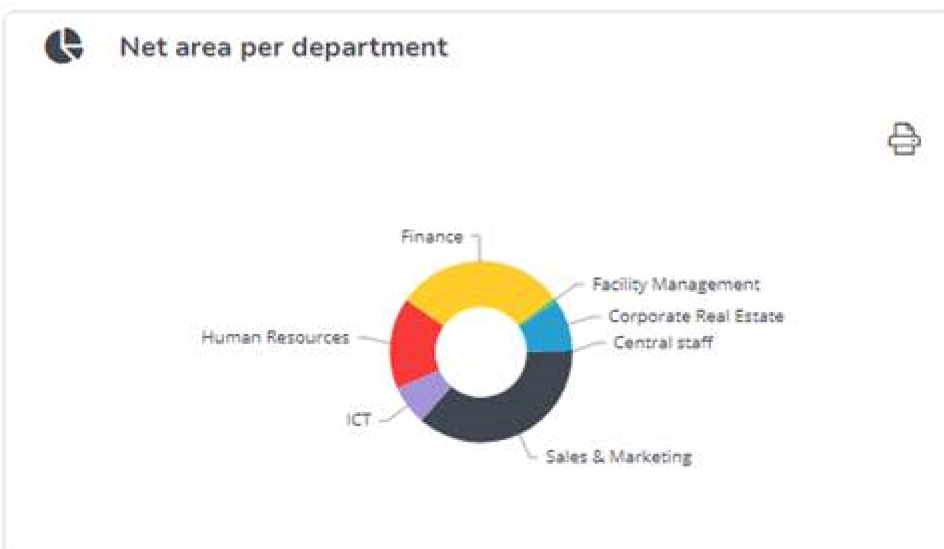
*Bookings to be approved*

## Area per person by building (average)



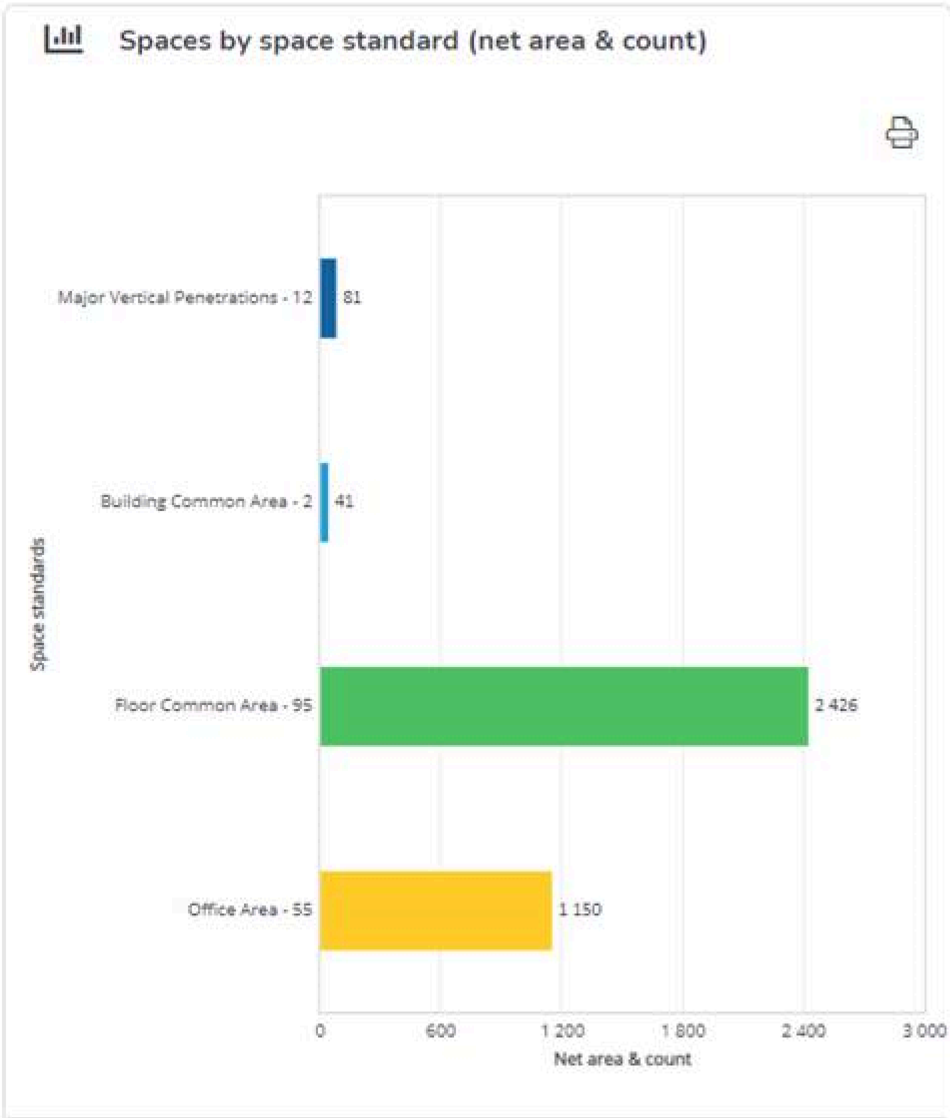

## Net area per department

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

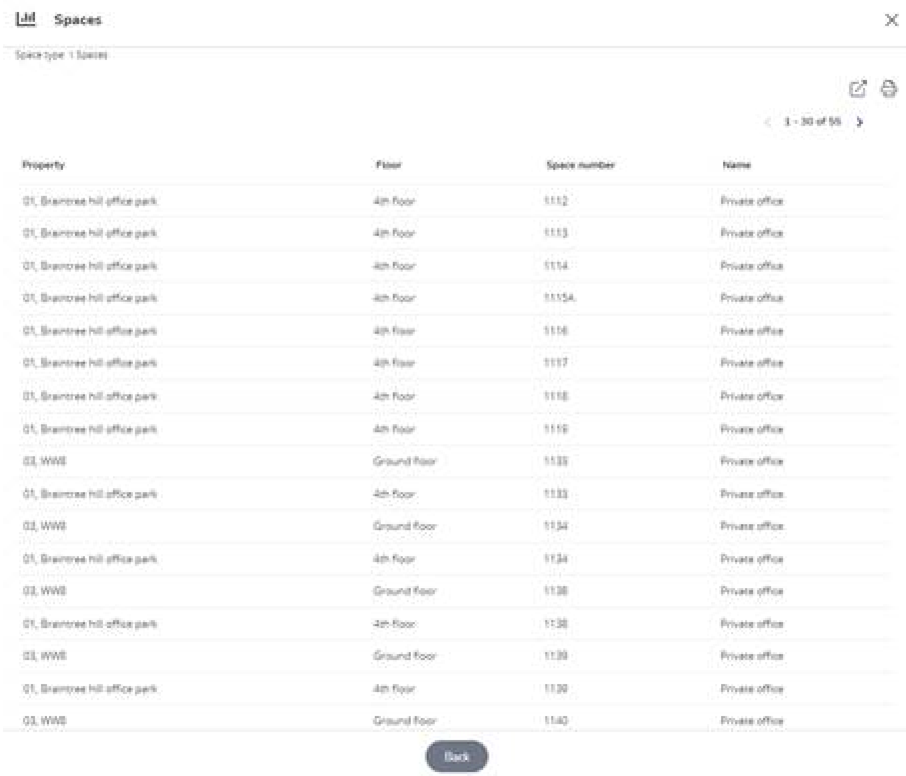



## Spaces by space standard (net area & count)

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

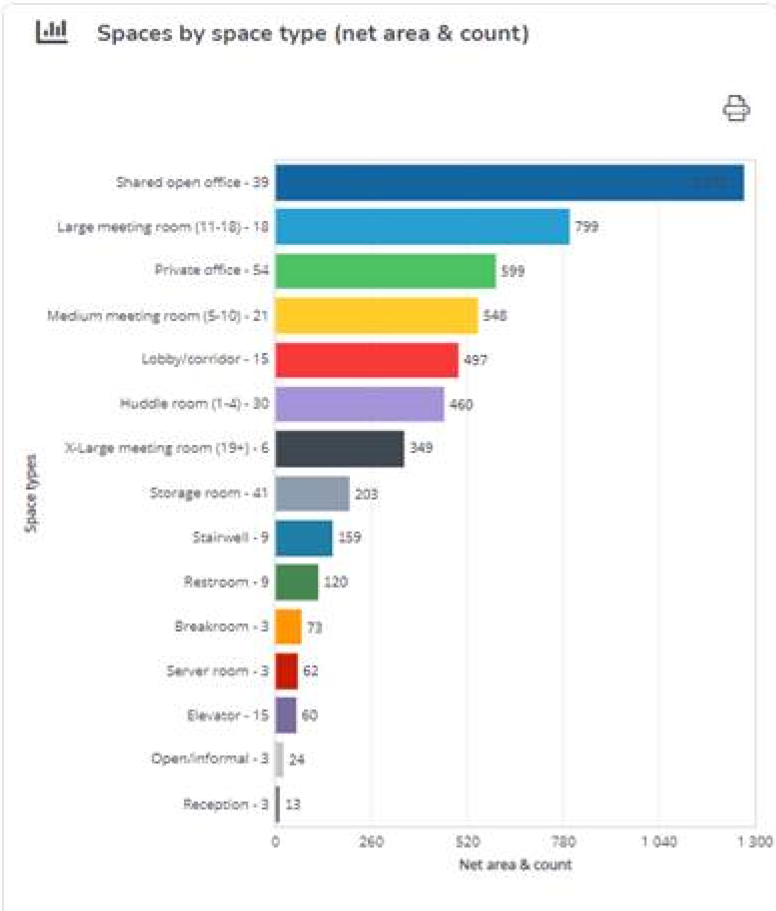



When selecting a bar, for example Office Area, you can zoom in to a list report. Here you can see all 55 spaces and where they are located.

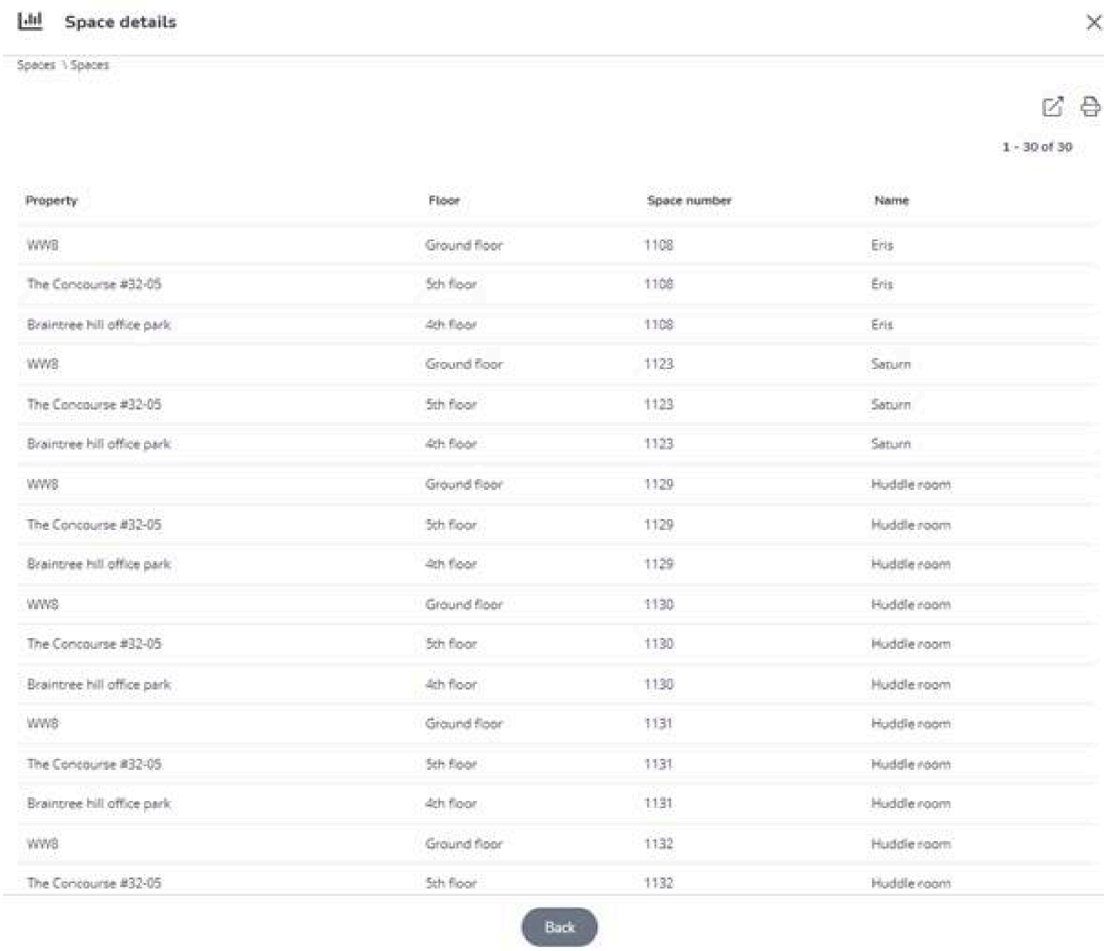



## Spaces by space type (net area & count)

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.




| Property | Floor | Space number | Name |
|---|---|---|---|
| WWB | Ground floor | 1108 | Eris |
| The Concourse #32-05 | 5th floor | 1108 | Eris |
| Braintree hill office park | 4th floor | 1108 | Eris |
| WWB | Ground floor | 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 | 4th floor | 1129 | Huddle room |
| WWB | Ground floor | 1130 | Huddle room |
| The Concourse #32-05 | 5th floor | 1130 | Huddle room |
| Braintree hill office park | 4th floor | 1130 | Huddle room |
| WWB | Ground floor | 1131 | Huddle room |
| The Concourse #32-05 | 5th floor | 1131 | Huddle room |
| Braintree hill office park | 4th floor | 1131 | Huddle room |
| WWB | 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.

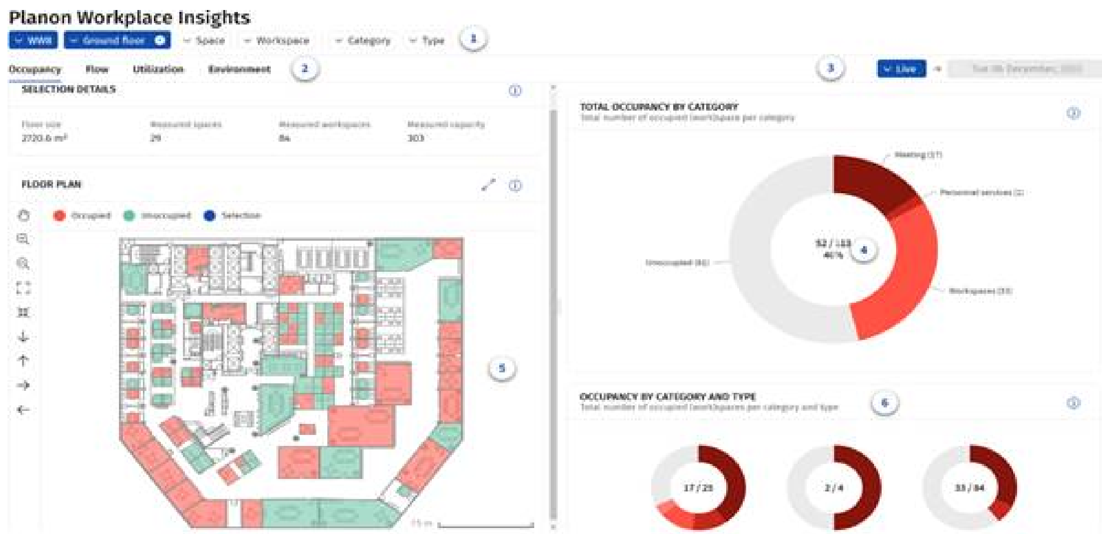

| Requestor | Description | Reserved unit | From | To |
|---|---|---|---|---|
| Adam Miles | | 1103 - Blaze | 12/14/2022 07:23 | 12/14/2022 08:23 |

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**.

# Planon Workplace Insights dashboards

*General*

## General



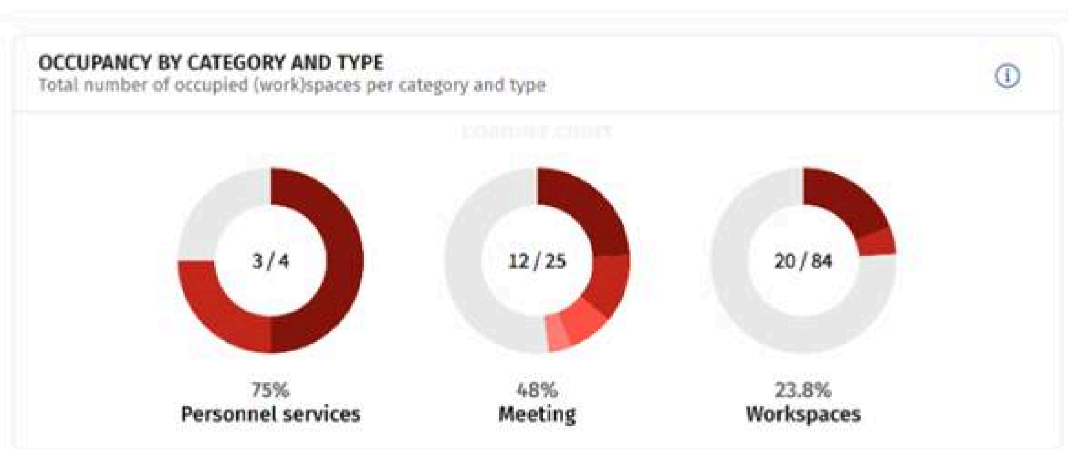
## *Live data*

## 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

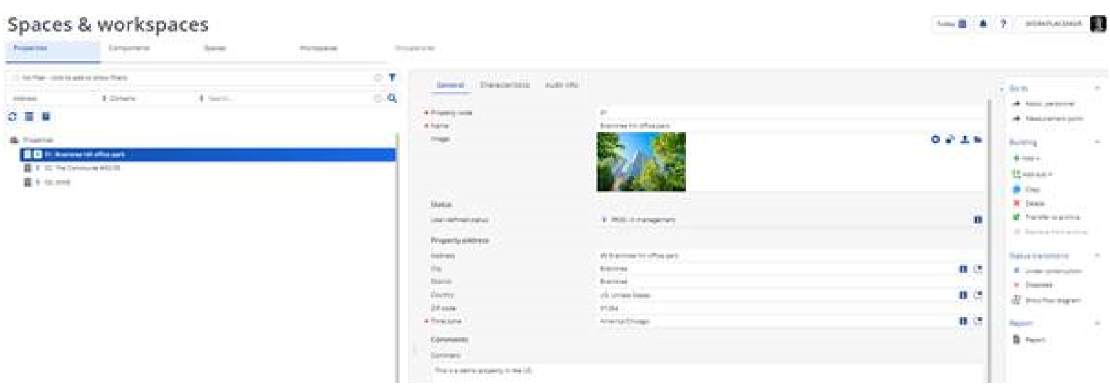
This TSI is to set up your property portfolio and the related floors, spaces, and workspaces.

### 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**.



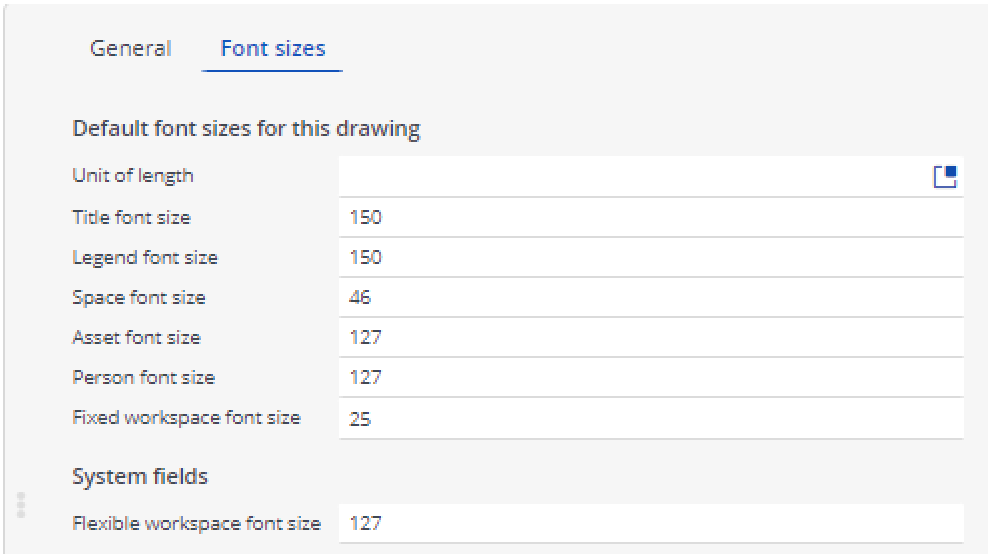
Most of the fields are self-explanatory. The following fields are explained in detail:

- 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:

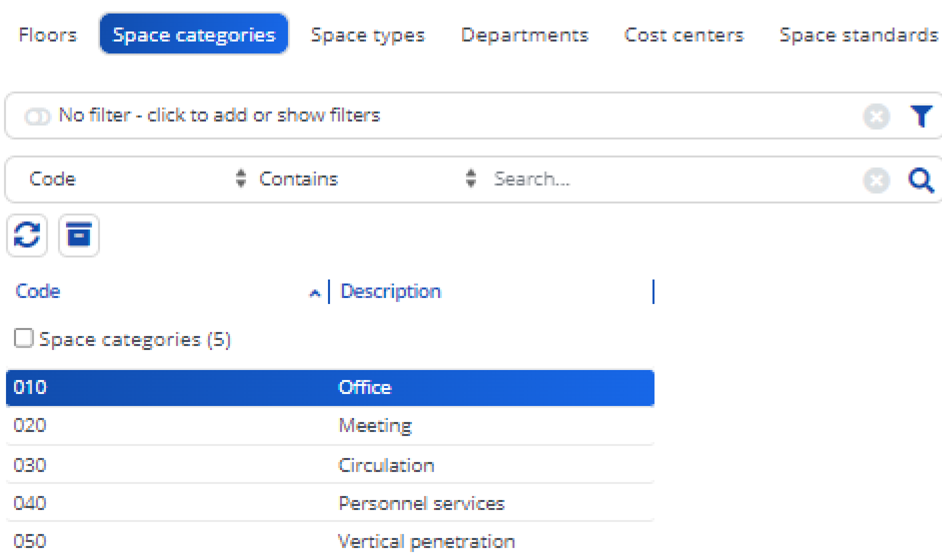
- Floors
  - Define for each building the floors that are available in the building. When adding a floor define the following:
    - Reference date (See Reference date)
    - The building
    - The floor (there is fixed list available)
    - The name of the floor is auto populated based on the description 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.




- ◦ 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.




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

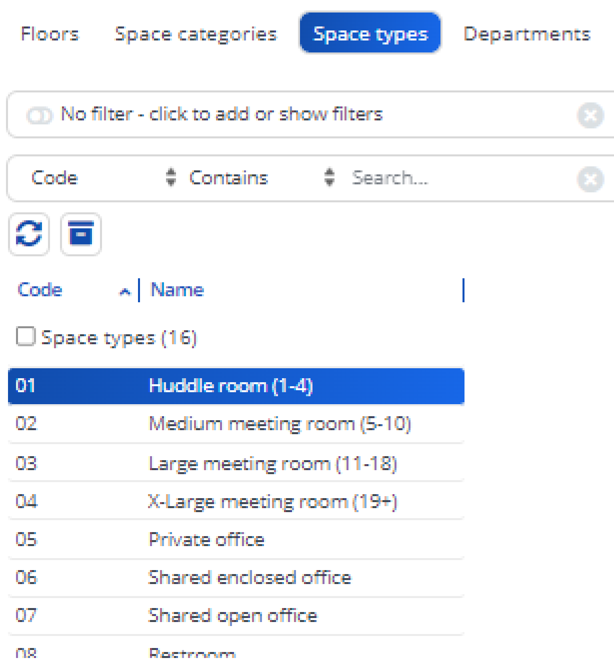
- Planon Workplace Insights Dashboards

- **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.

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.



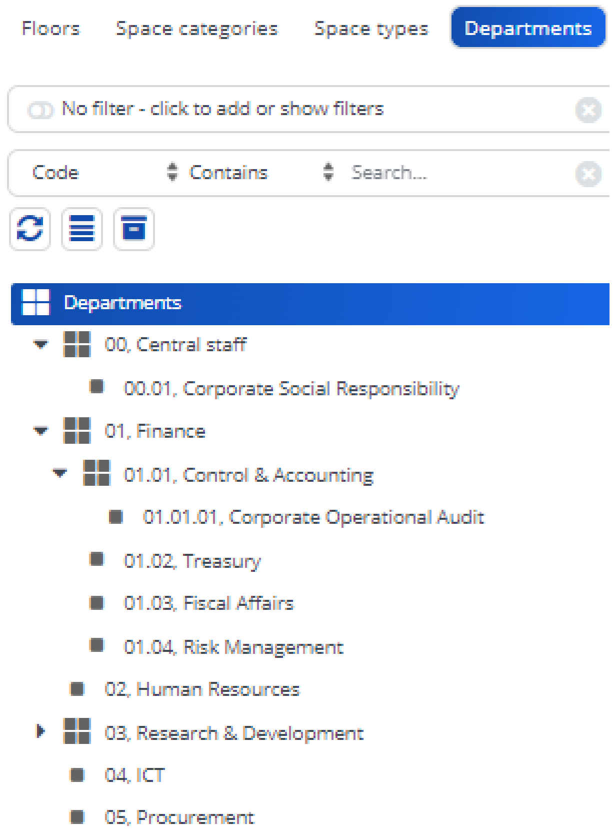

A space type can be linked to a space to group and report on it. This is used in for example:

- 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.



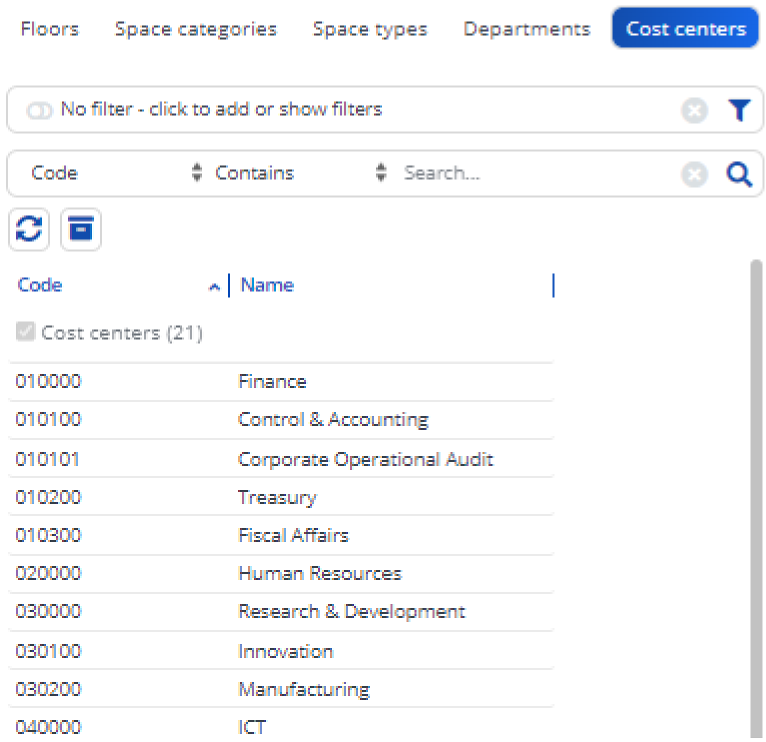

A department can be linked to a (work-)space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- **CAD Integrator** > **Space mapping**

## Cost centers

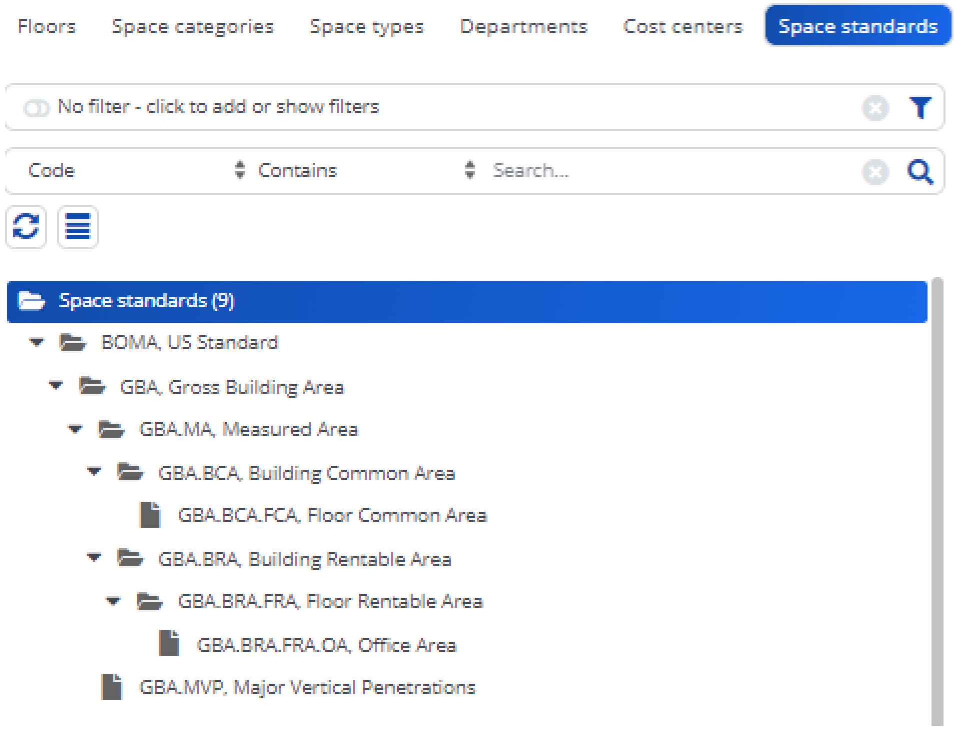
With this selection step you can filter spaces by cost center. Cost centers are units like departments which are used in cost accounting and to which costs can be charged.

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




## 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:




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.

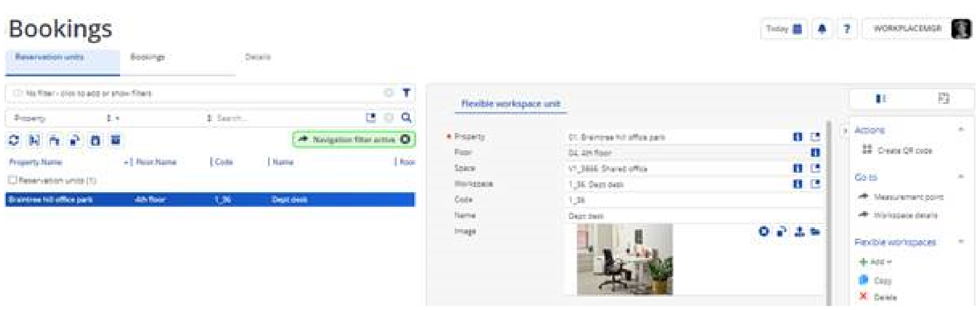
When workspaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On workspace level the following is possible:

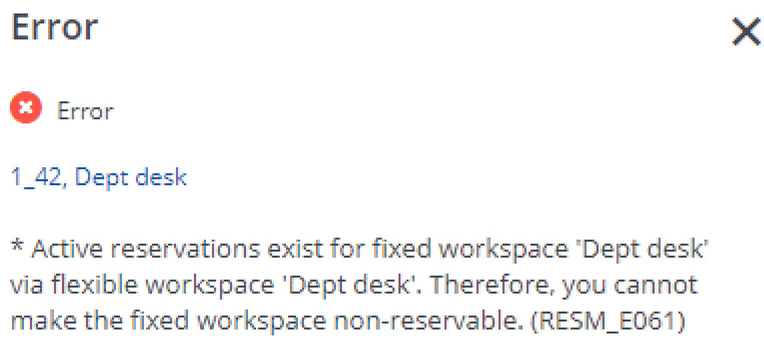
- Add, change code of the workspace (**Advise not to do so if CAD drawing is the source**)
- Add, change name.

- 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




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




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:

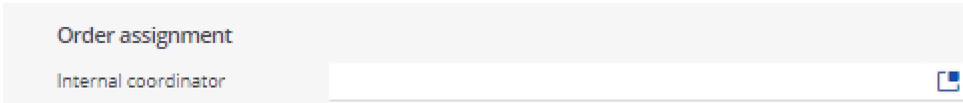

## Person types

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.

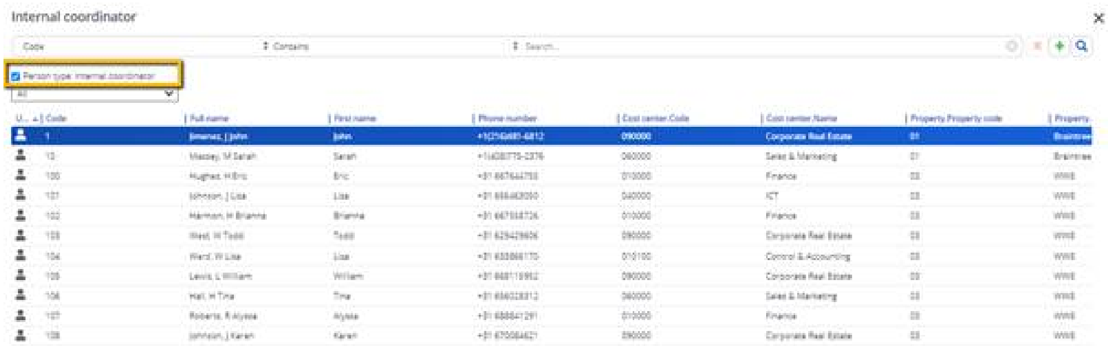
You can define a maximum of 10 person types. The **Person types** selection step enables you to select the defined existing person types within your organization. You can link a person to a person type by selecting a person type in the **Person types** selection step and then selecting a person from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




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



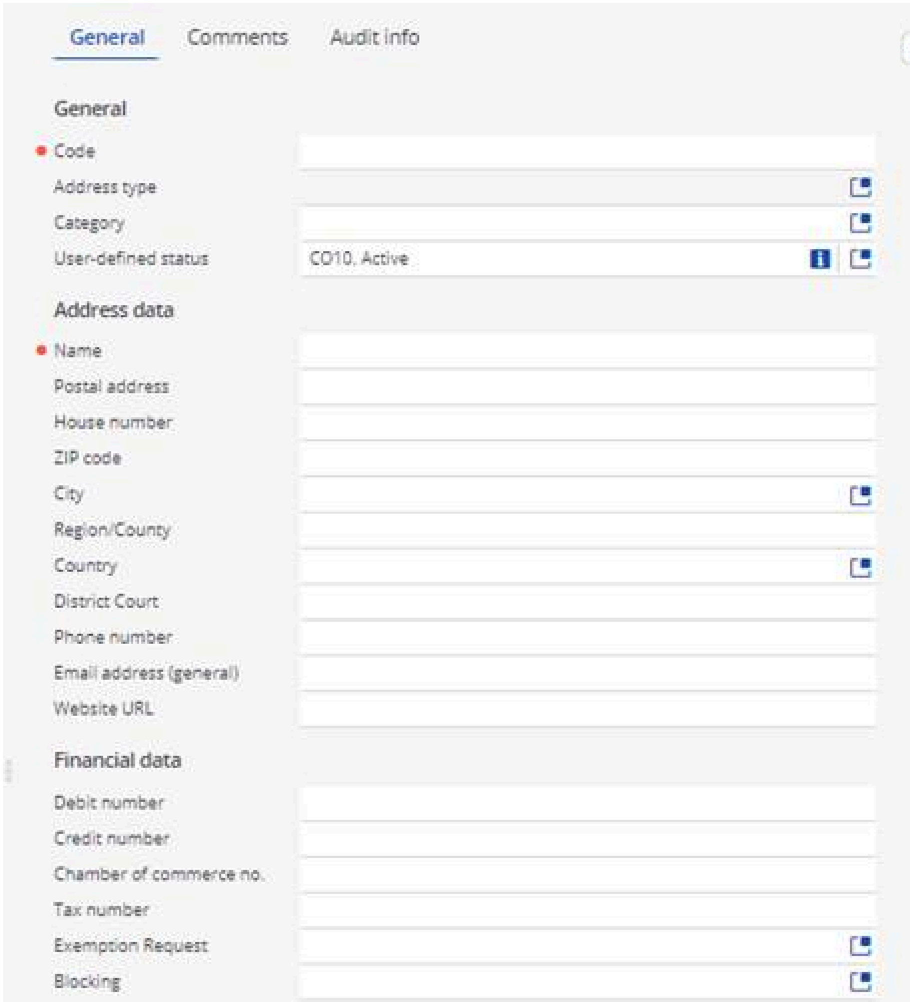

## Organizations

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.

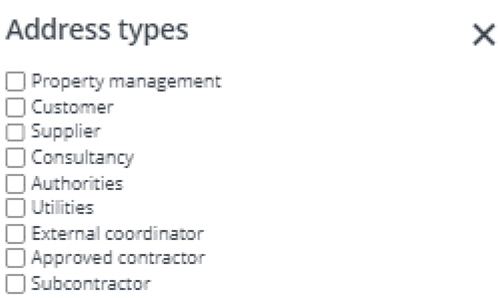
Here you can:

- Add
- Copy
- Delete
- Change
- Archive

The following layout is available:




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

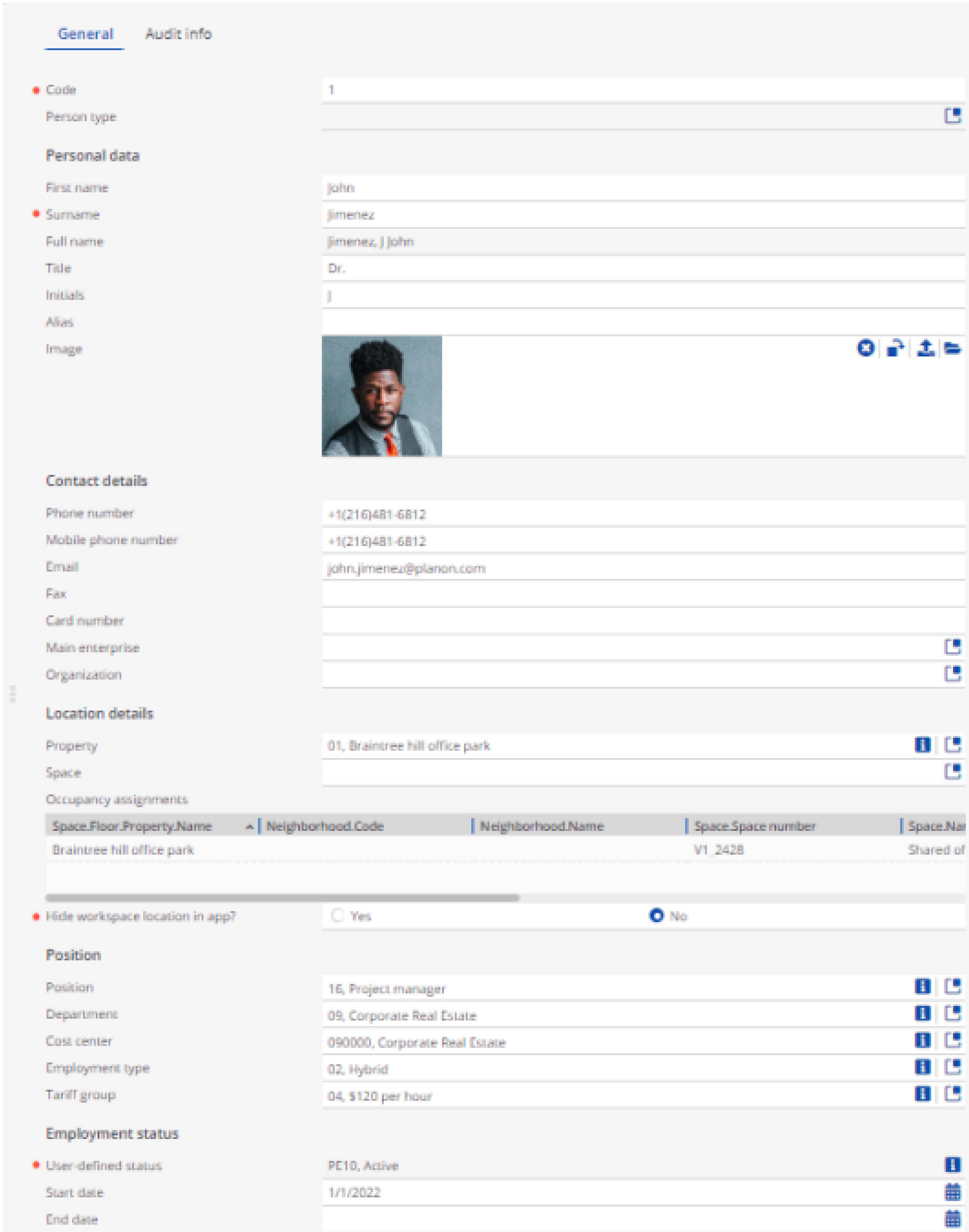



- Category (pick list to be maintained in **Base data** (space) > **Property pick lists** > **ADRSOORT**
- City (List)
- Country (list)
- Exemption Request (Y/N list)

- 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:




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)

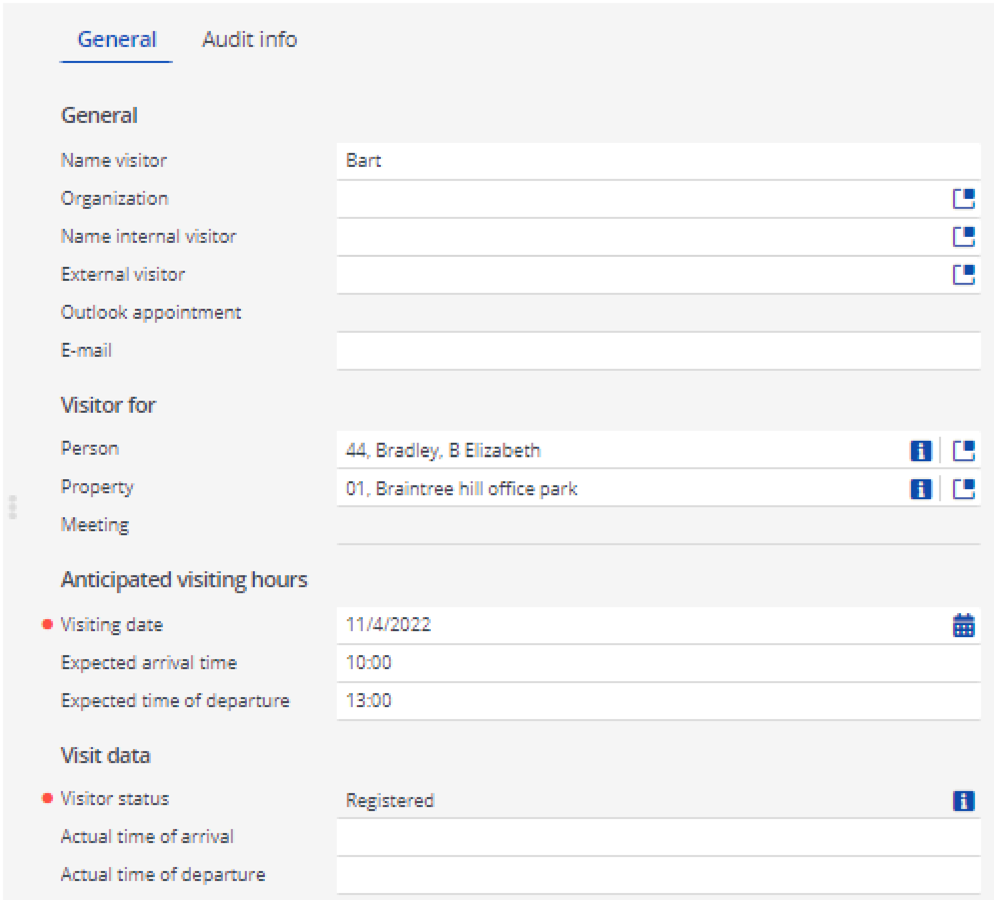
## Details

The Selection level details has the following selection steps:

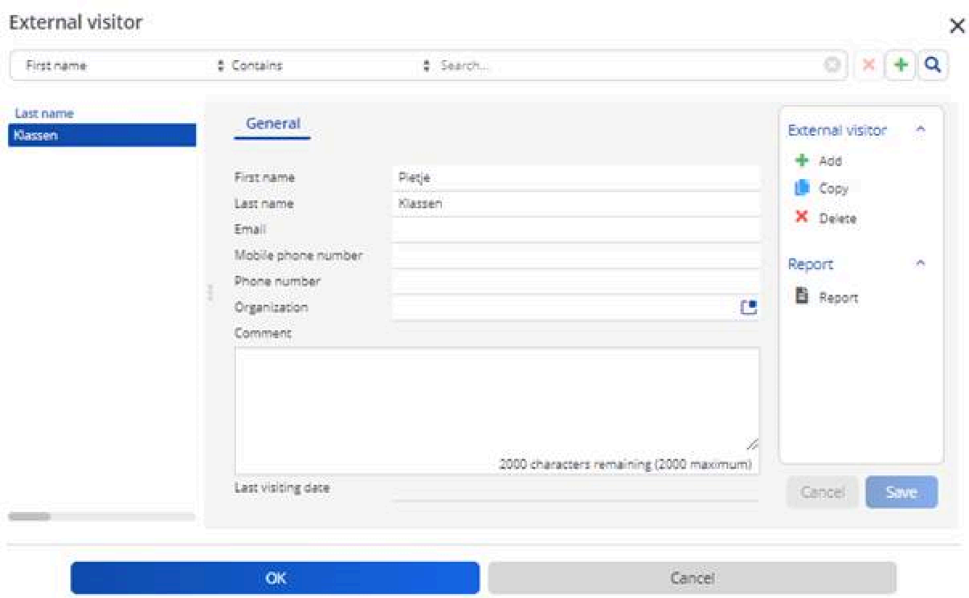
- Visitors
- History
- Occupancy

**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:

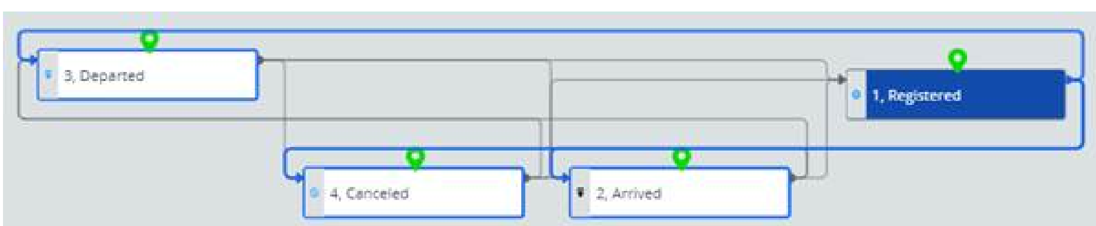



- Name internal visitor (person from the personnel list)
- External Visitor (create external visitor or select external visitor)
    - Each visitor can be created in a list so the details can be used for future references.
    - When selecting an external visitor from the list the name of the visitor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




- ◦ 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:




**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 settings (base) (23)

| | |
|---|---|
| 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**


| Space mapping 'Departments Reference date': 2/17/2023 | | | |
|---|---|---|---|
| | Departments | Net area(m²) | 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

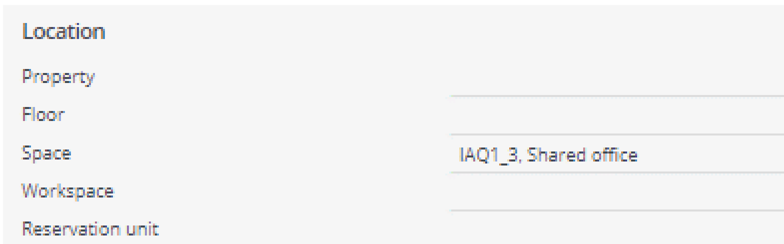
The selection level Locations gives the user the possibility, to filter on:

- Spaces
- Reservation units
- Workspaces
- Floors

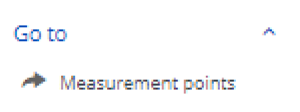
From these lists you can navigate directly to the related measurement points*. Per selection step the user can use additional filters to get specific results, for example, show all spaces where space category is ‘office’.

*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.




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.




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).<br><br>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.<br><br>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. |

| Field | 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.<br>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.<br>During this time window, the location remains unavailable for reservation even though the reservation unit may be vacant.<br>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).<br>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-show event) | If set to **Yes**, the reservation end time will be changed to the time of the no-show event if the following conditions apply:<br>• A no-show event occurs<br>• Checking for no-show events has been enabled<br>In addition, the status of the reservation is changed to the configured status.<br>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 departure event) | If set to **Yes**, the reservation end time will be changed to the time of the early departure event if the following conditions apply:<br>• An early departure event occurs<br>• Checking for early departure events has been enabled<br>In addition, the status of the reservation is changed to the configured status.<br>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 *Immeasurable*. |
| 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.<br>To enter multiple email addresses, use a comma (,) or semi-colon (;) as separator.<br>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:<br>• Error<br>• Warning<br>• 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.

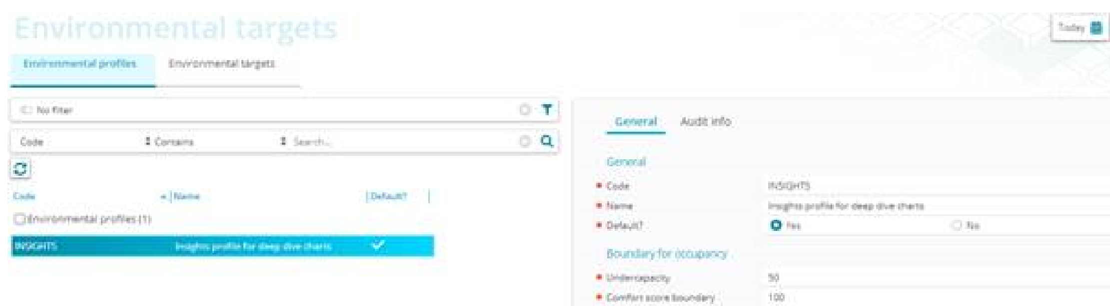
The selection level has two selections step regarding readings:

- 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.

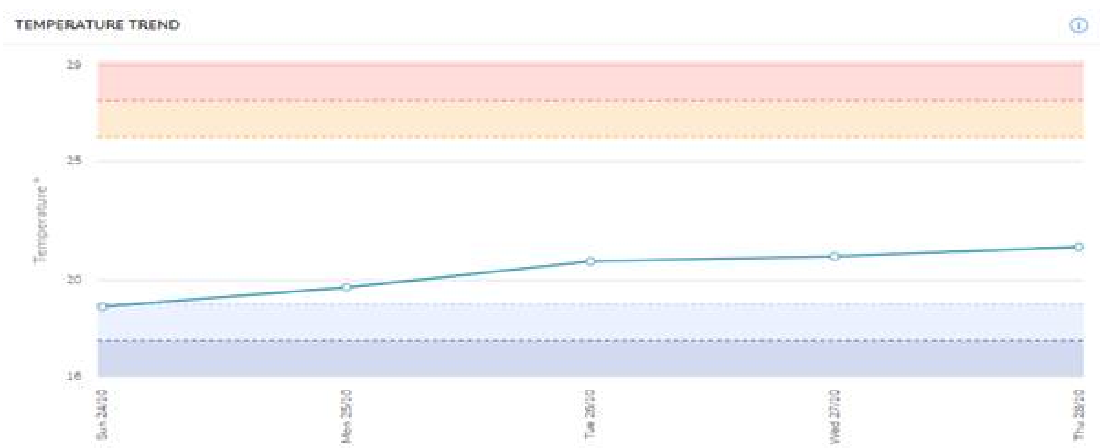
The latest reading is updating the data on the Measurement point (Live data).

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

# Profiles & targets




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.

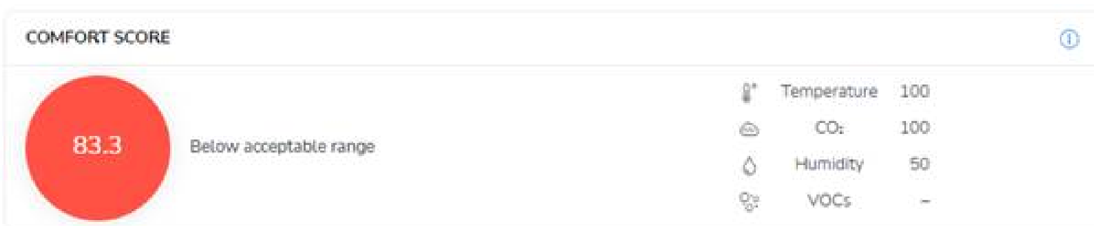
When a space has a max capacity of 10 people and there are < 5 people counted in the space (by sensor) the space is “Underutilized”.

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

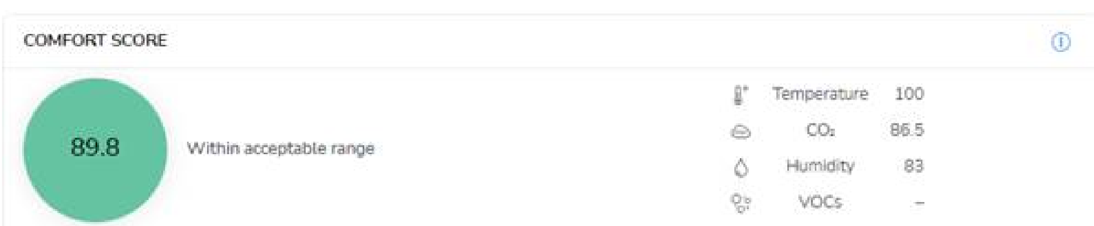

## The Comfort Score Boundary

(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.




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



## 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.

Target values (9)

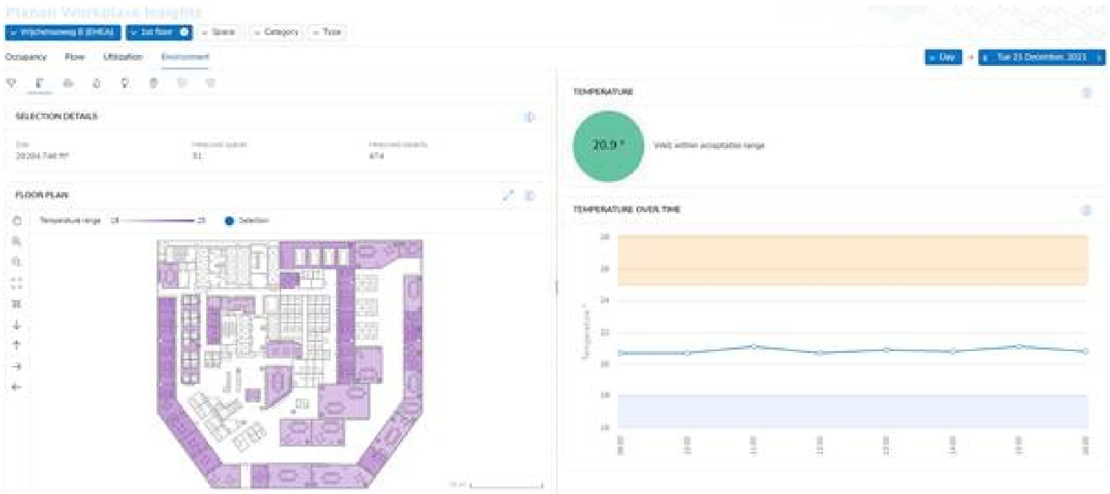
| Environmental profile.Code | Environmental profile.Name | Measurement point fiel... | High | Low | Margin |
|---|---|---|---|---|---|
| INSIGHTS | Insights profile for deep dive cha... | Flow in | | | |
| INSIGHTS | Insights profile for deep dive cha... | Flow out | | | |
| INSIGHTS | Insights profile 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:



# 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.
3. 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.<br><br>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.<br><br>Move orders are added by authorized Planon ProCenter users at Move orders & requests.<br><br>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.<br><br>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.<br><br>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.<br><br>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. |

## Details - Move lines

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.

1. Go to **Move settings** > **General** tab.
2. 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.

3. 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.
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 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.

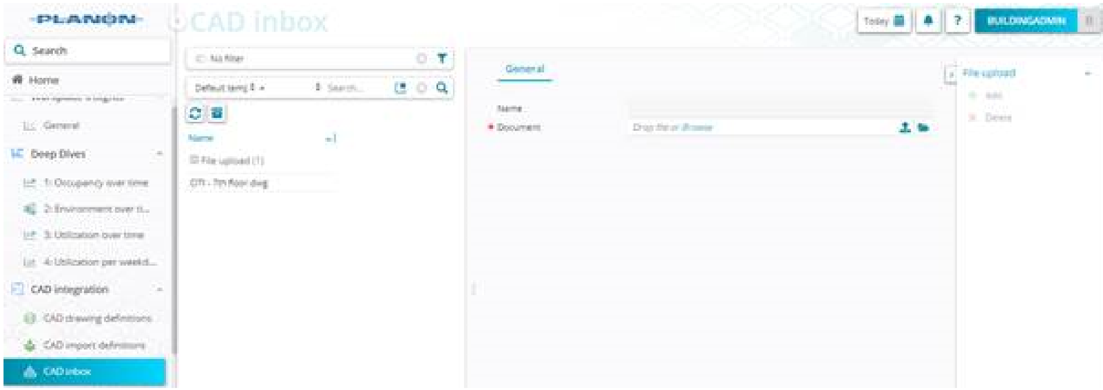
   The User-defined 'Executed statuses' dialog box is displayed.
3. In the Available section, select the 'Executed' user-defined statuses to be assigned to move requests whose move lines have all been completed.
4. Click the right arrow button to transfer these statuses to the **In use** section.
5. Click **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**




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


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

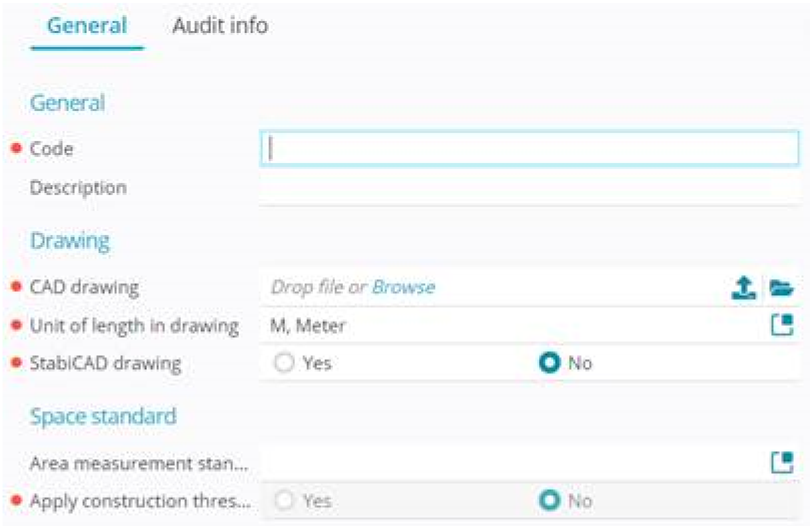
For detailed information about CAD Drawing definitions, refer to the WebHelp.

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**




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.


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 |
| Floors | 01 |
| Sensor zone | 01 |
| Spaces | 01 |
| Workspaces | 01 |

# Add CAD business object mapping

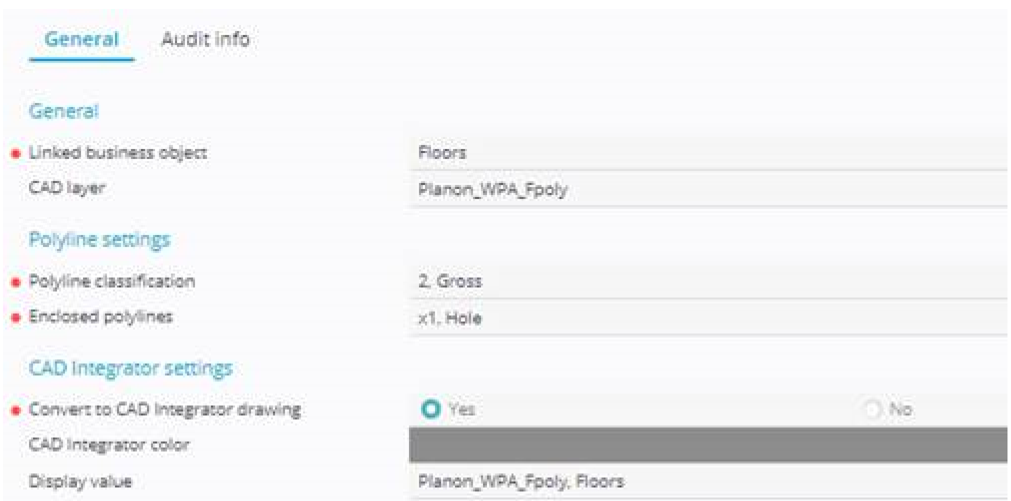
See the following example of CAD business object mapping per business objects.

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

## Floors

Polyline classification - > **2, Gross**

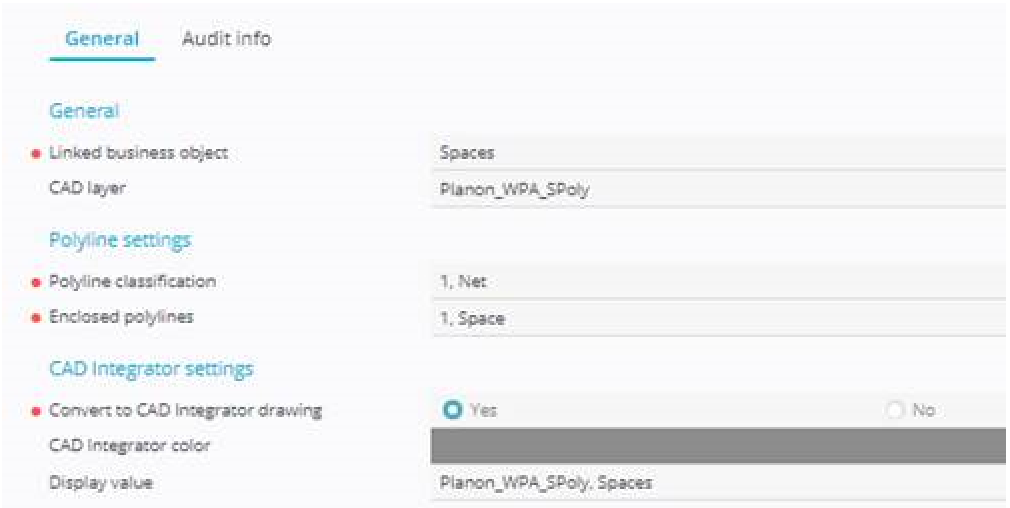
No field mapping required




## Spaces

Polyline classification - > **1, Net**

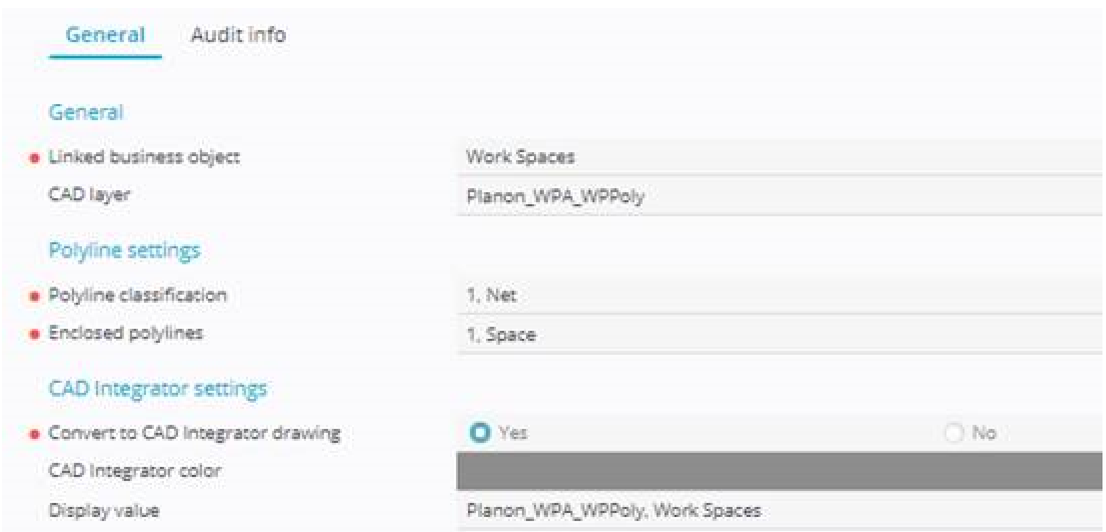
Field mapping required




## Workspaces

Polyline classification - > **1, Net**

Field mapping required



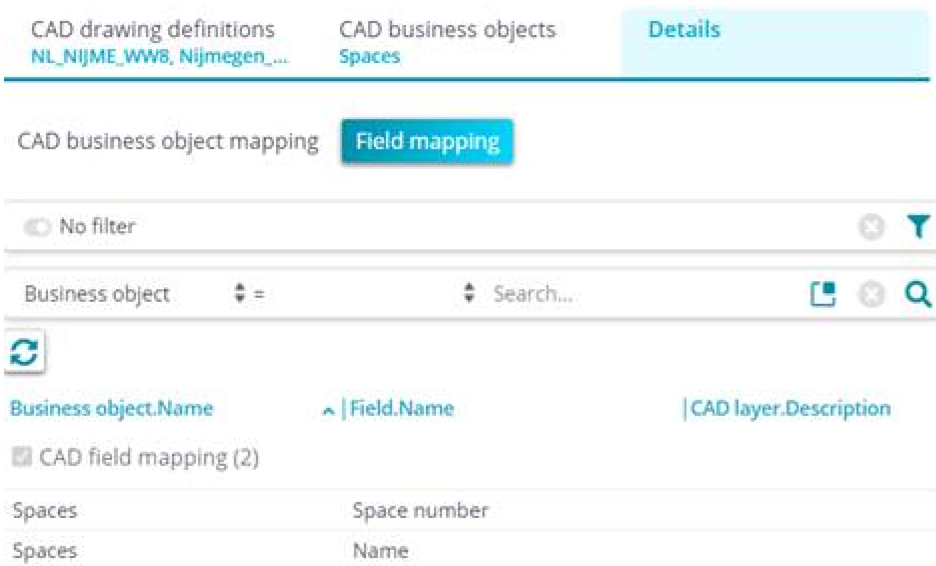

## Construction data

Destination CAD Integrator Drawing > **2, FM drawing**

No field mapping required


### Field mapping

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

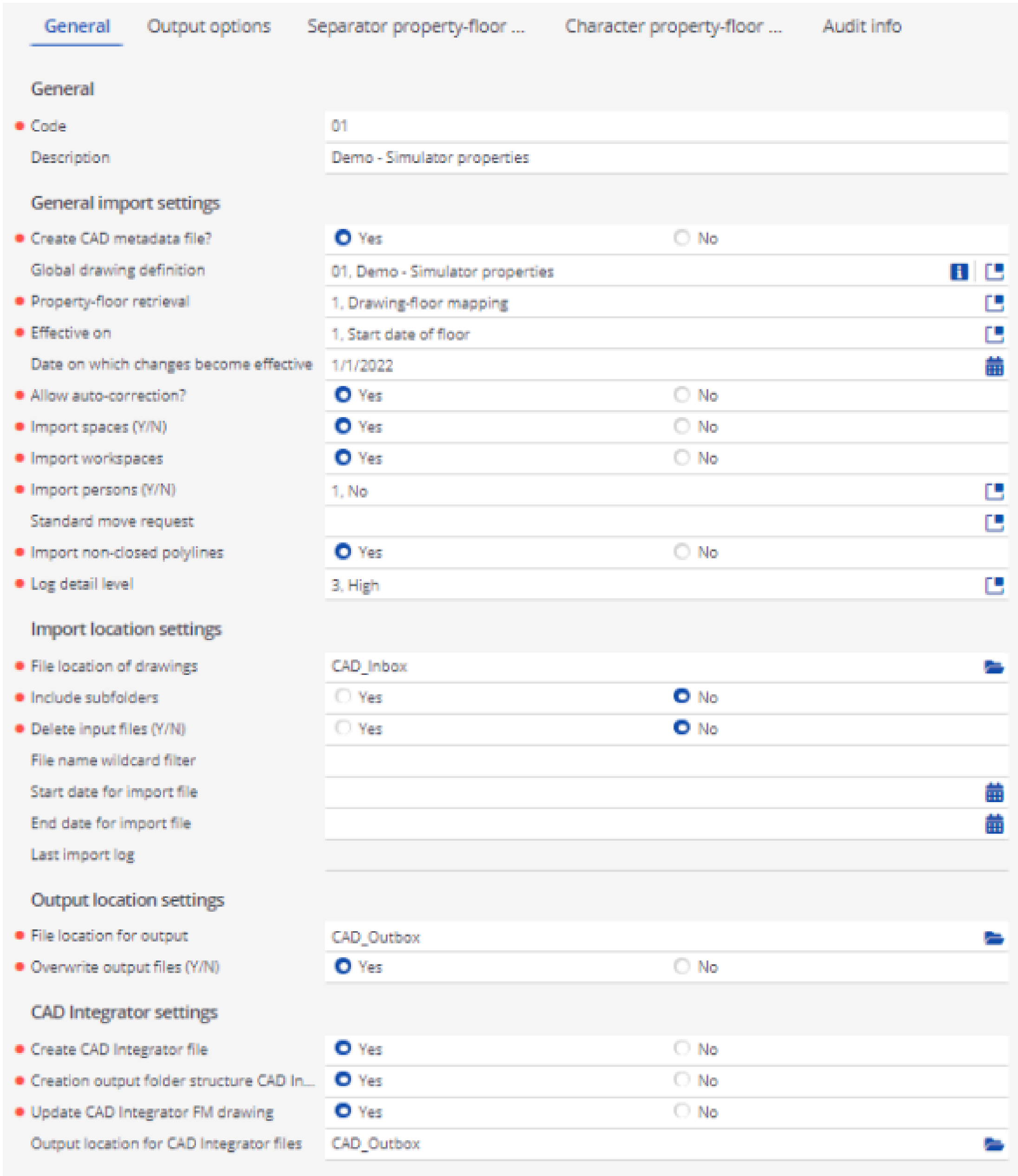



## Import definitions

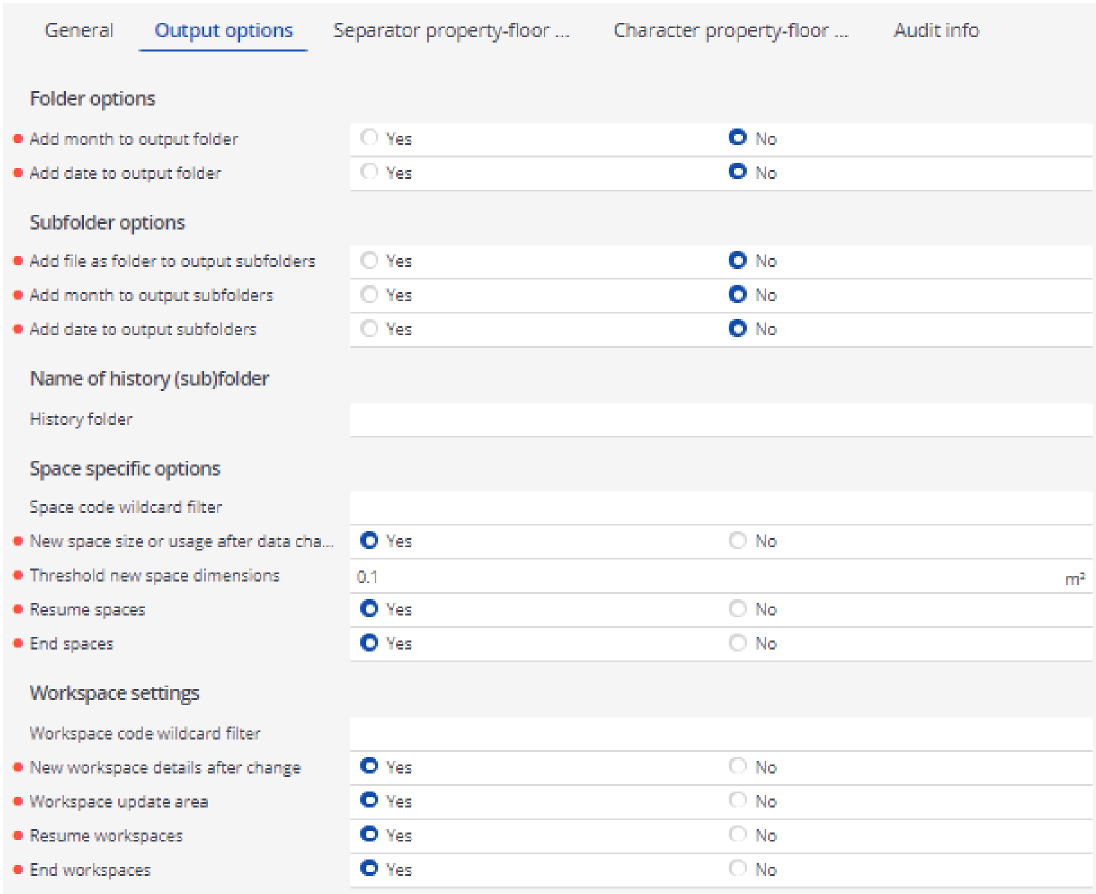
The following settings are important to have a seamless import based on the linked drawing and the linked Drawing definition.

### 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.

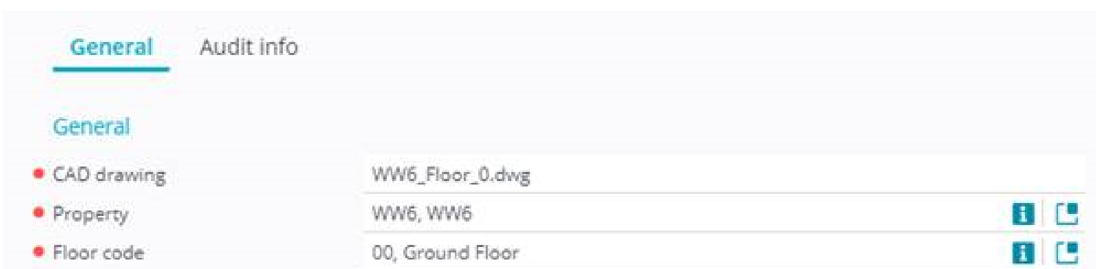



- Create CAD metadata file? Set this to **Yes**. It will create an additional CAD Drawing that holds the UUID “Shared ID” which can be used for unique reference to sensor IDs.
- File name wildcard filter: this is up to the customer to define, but typically you can use the name of the drawing.




## Mapping between drawing & floor

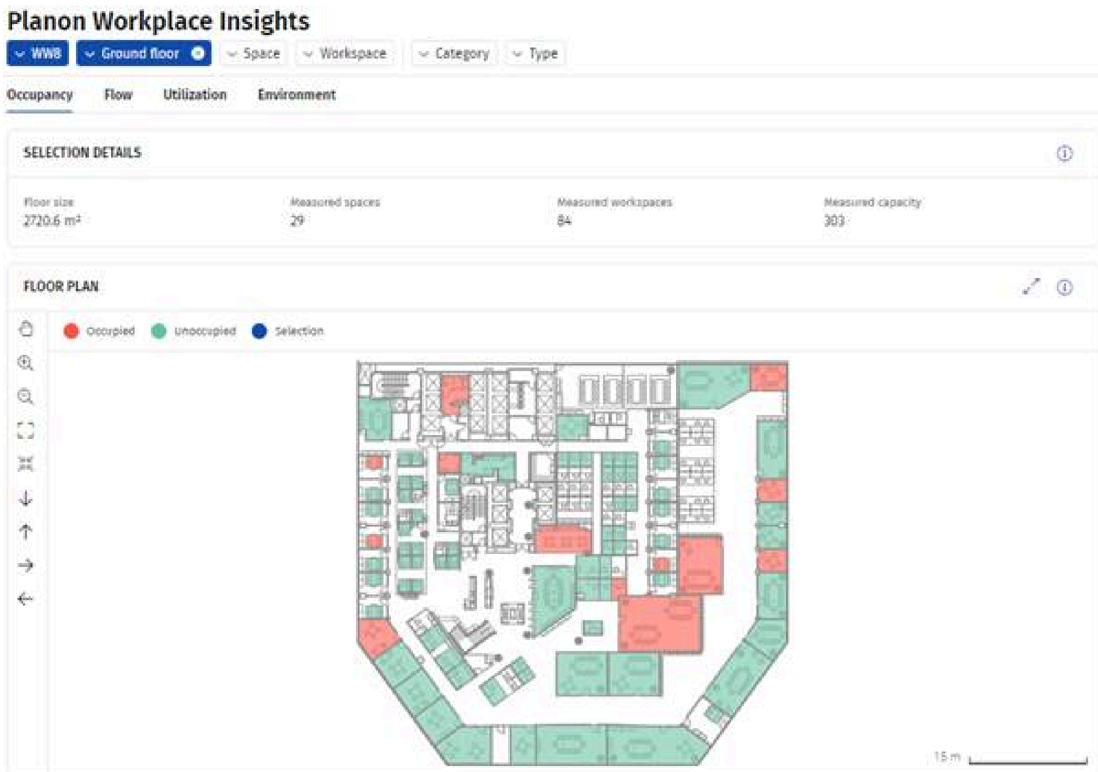
Here, you will be able to select the correct drawing that is going to be imported and linked to the correct property and floor (of that building):




## 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:



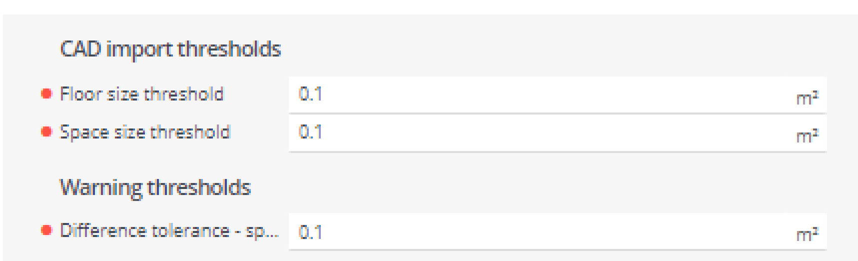

# Threshold values

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:



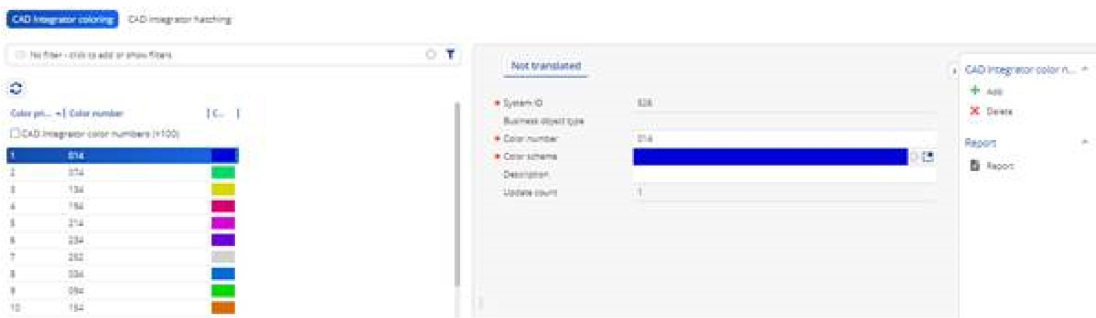
# CAD colors & hatchings

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:

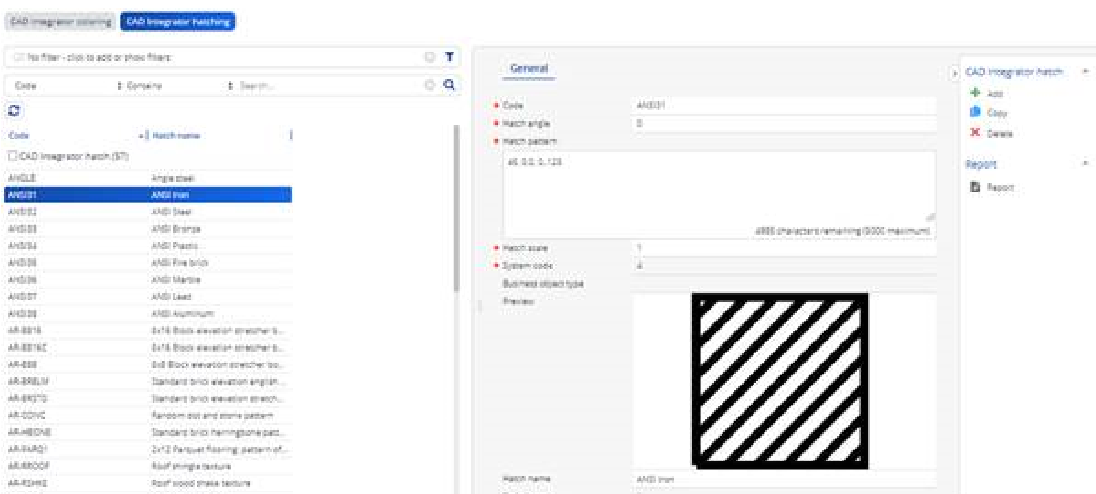
- Departments
- Cost centers
- Space types
- Space categories
- Tariff groups
- Space standards
- Free space attributes

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

CAD Integrator coloring



CAD integrator hatching



# Reservations

# 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.

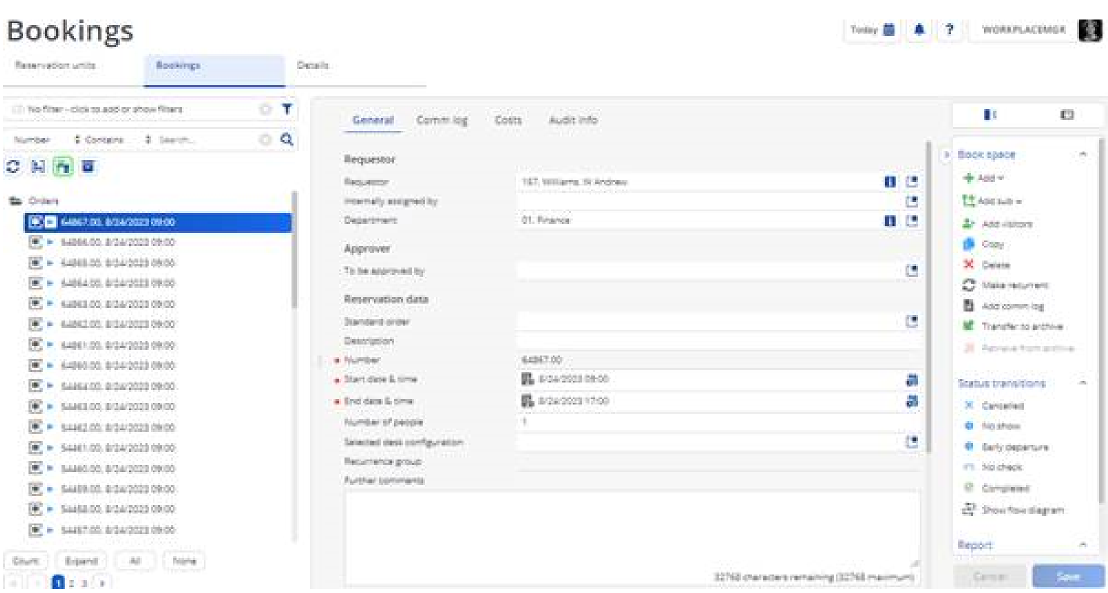
- **Furniture layout:** With the furniture layout / room layout you can define what standard desk setup type it has. It defines the desk setup type e.g., Boardroom, U-shape, etc. with a possible image and the reconstruction time / costs.

  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) > Non-bookable periods.

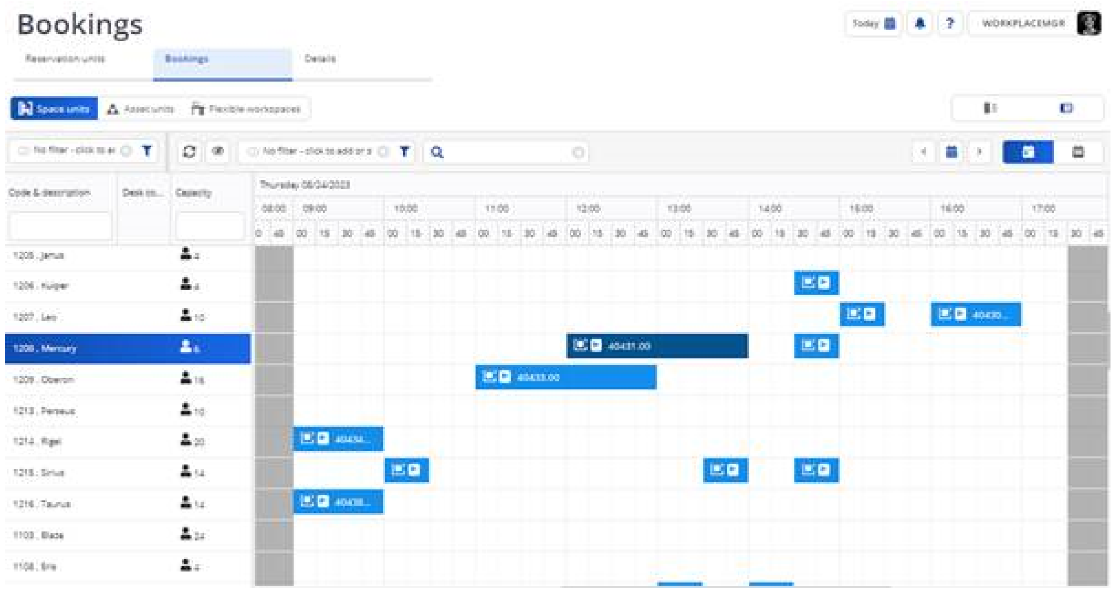
## Bookings

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:




*or* in the graphical planner:




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



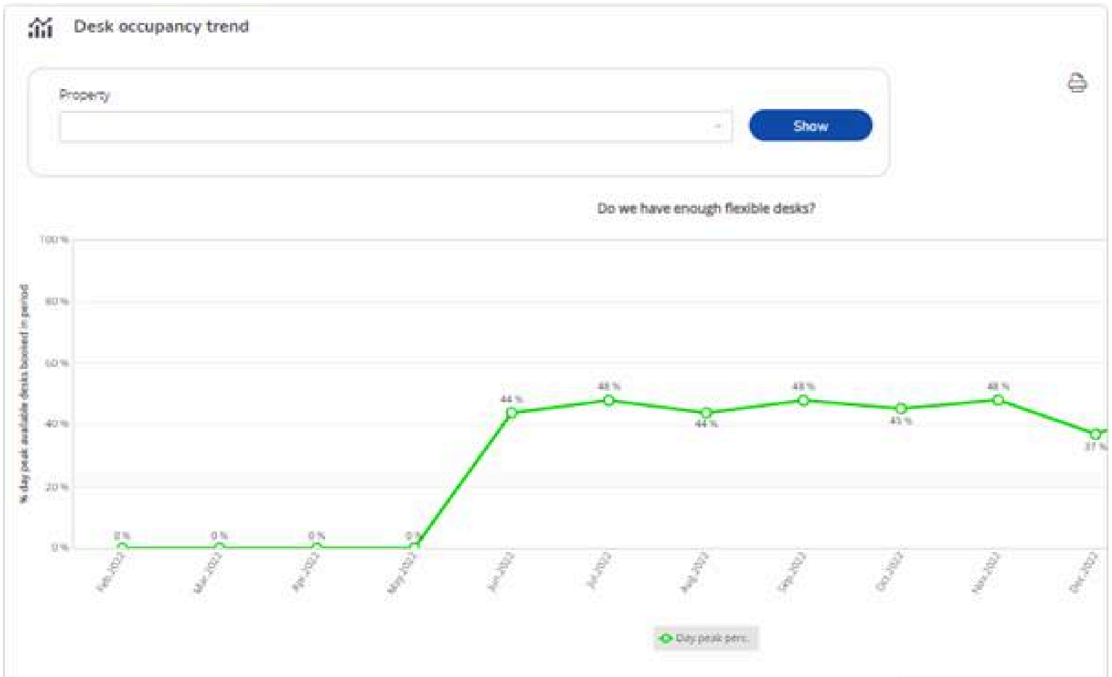
## Desk booking stats

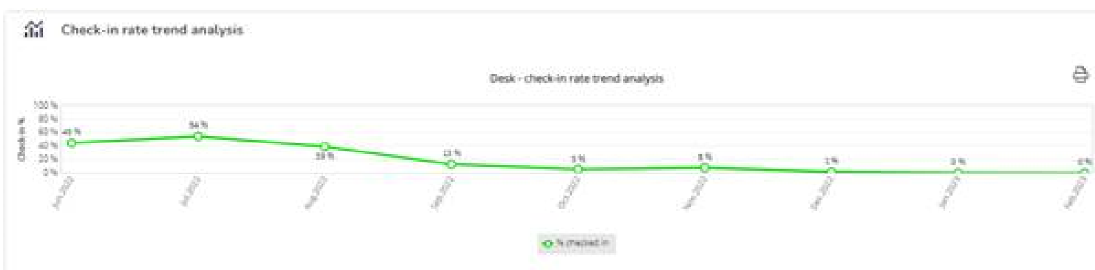
This page shows a set of desk related booking stats. See below a part of the dashboards available.

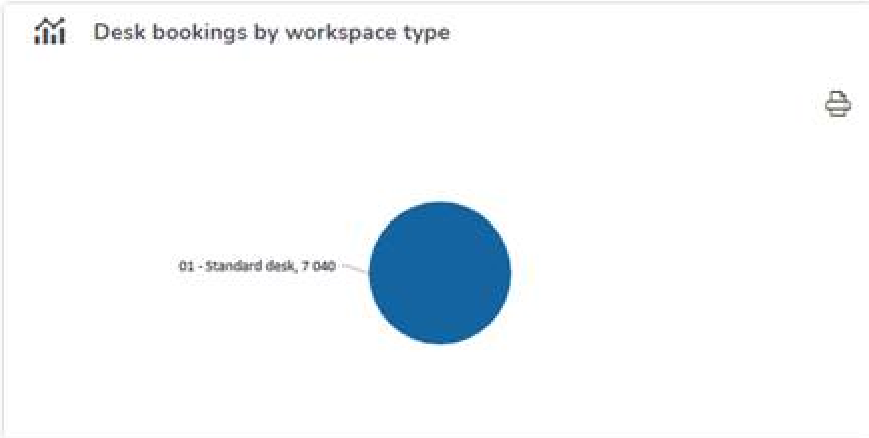
On top of the page there is a possibility to filter e.g., date, property, floor, department which will be applied on all dashboards.

In some dashboards you can zoom in for more details.


No-show trend analysis per month
Desk - no-show trend analysis per month
Booked
No show events


Desk occupancy trend
Property
Show
Do we have enough flexible desks?
% day peak available desks booked in period
100 %
80 %
60 %
40 %
20 %
0 %
Feb 2022
Mar 2022
Apr 2022
May 2022
Jun 2022
Jul 2022
Aug 2022
Sep 2022
Oct 2022
Nov 2022
Dec 2022
Day peak perc.


Check-in rate trend analysis
Desk - check-in rate trend analysis
% checked in

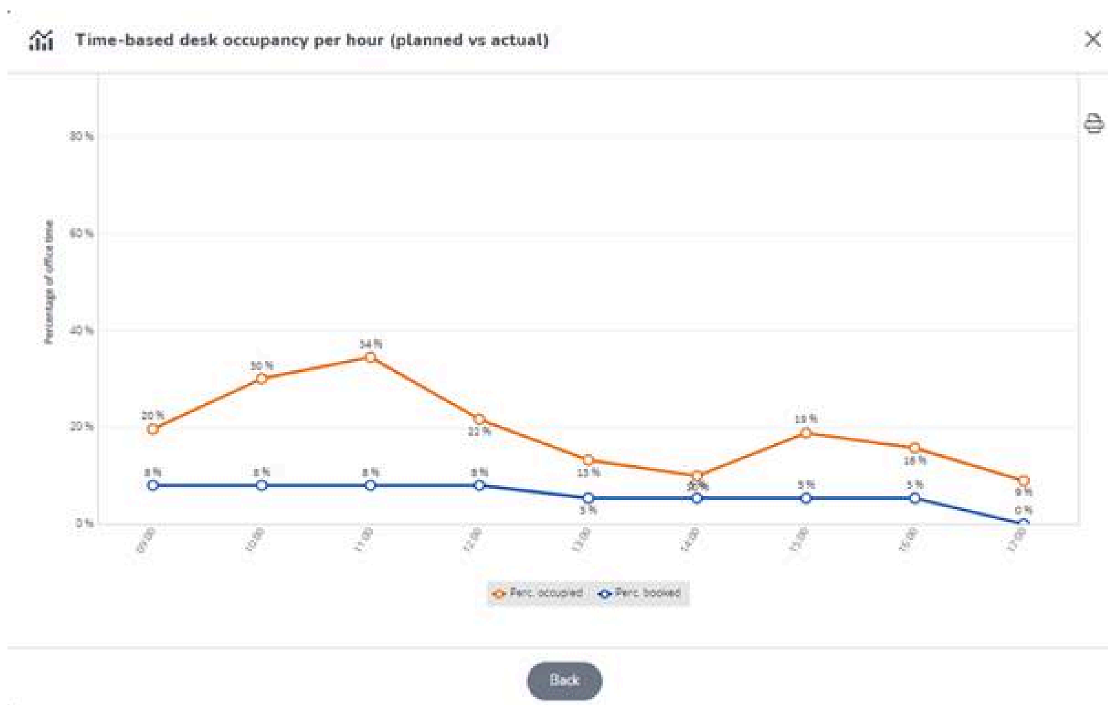



# Desk utilization

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.

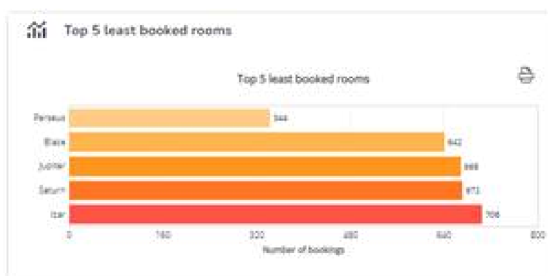


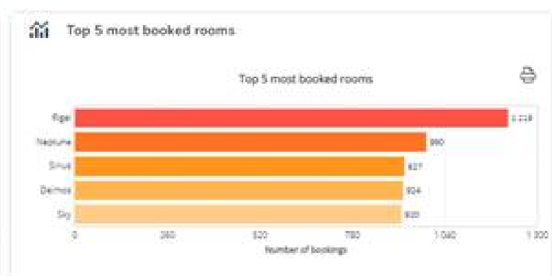

# Room booking stats

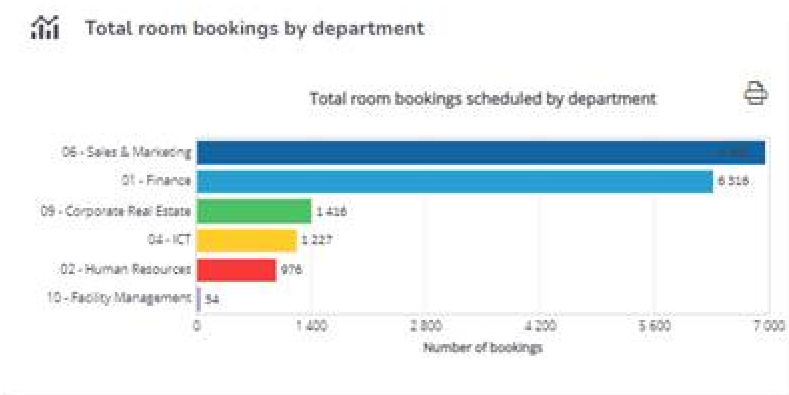
This page shows a set of room related booking stats. See below a part of the dashboards available.

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.

*Calendars*

*Cities*

*Property pick lists*

*Space pick lists*

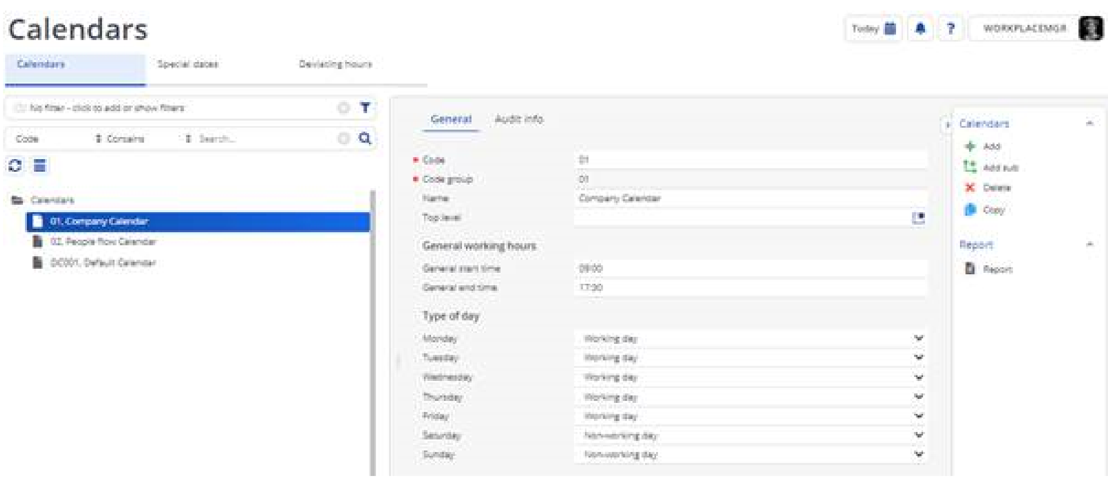
*Workspace types*

## 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.

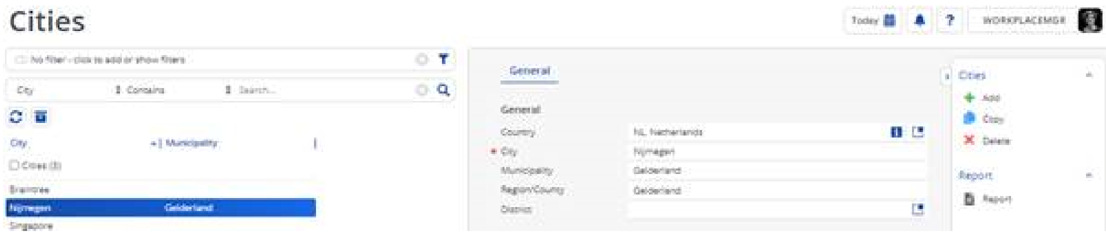
You can configure as many calendars as required in the **Calendars** TSI. Since a calendar is a hierarchical business object, you can add multiple sub calendars to every main calendar. At level 2 of the hierarchy (the first sublevel), you only need to enter data that deviate from level 1. The same applies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




## 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.




## 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

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

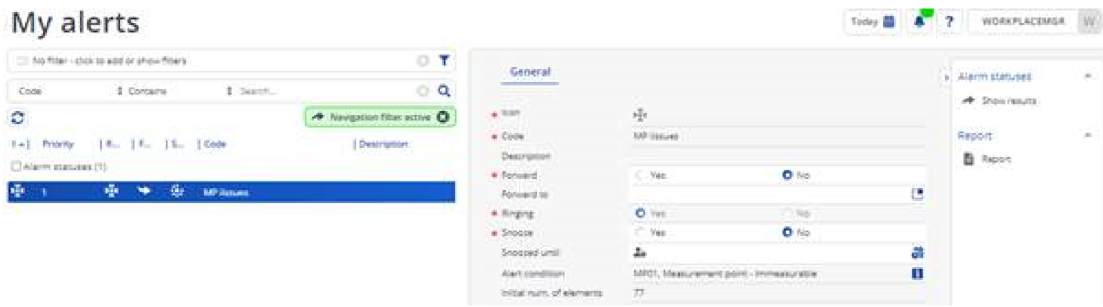
Room layouts (or Desk configurations) can be created here directly linked to a space unit. Here you set up the following:

- 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**.

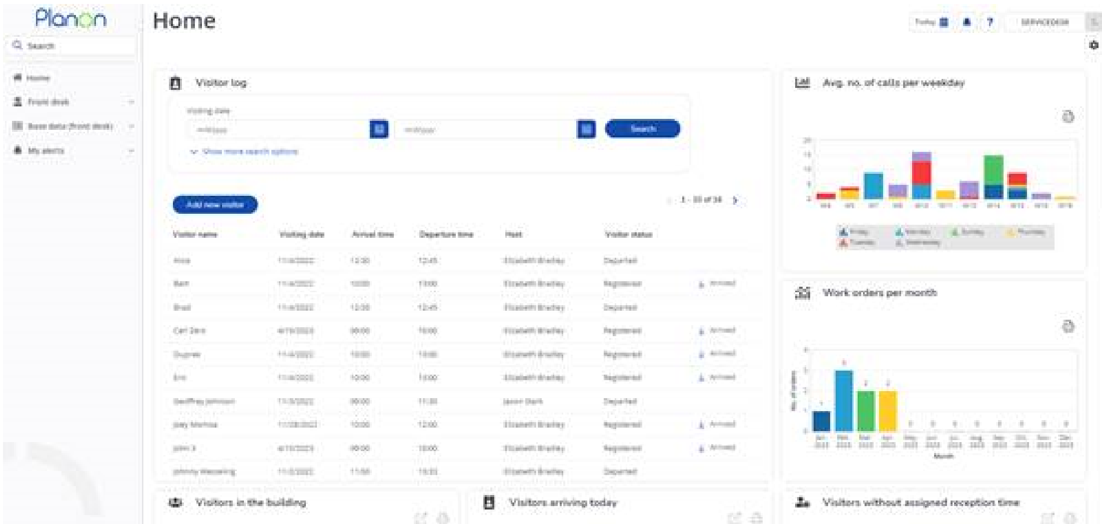



When there is an alert, you can see or do the following:

- 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

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



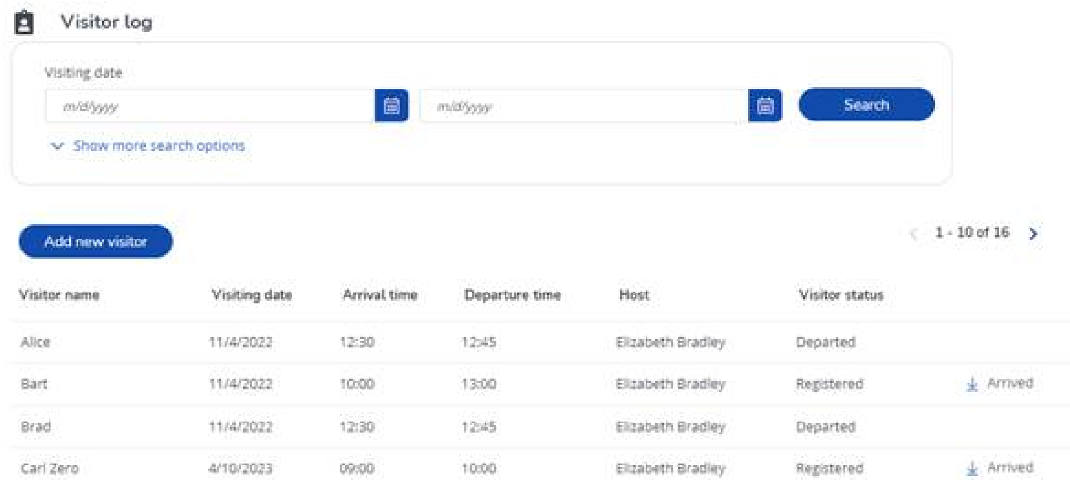

In the navigation panel a set of Navigation groups are available with a set of Navigation group items. In the following paragraphs each Navigation group and the related Navigation group items will be explained.

## Home

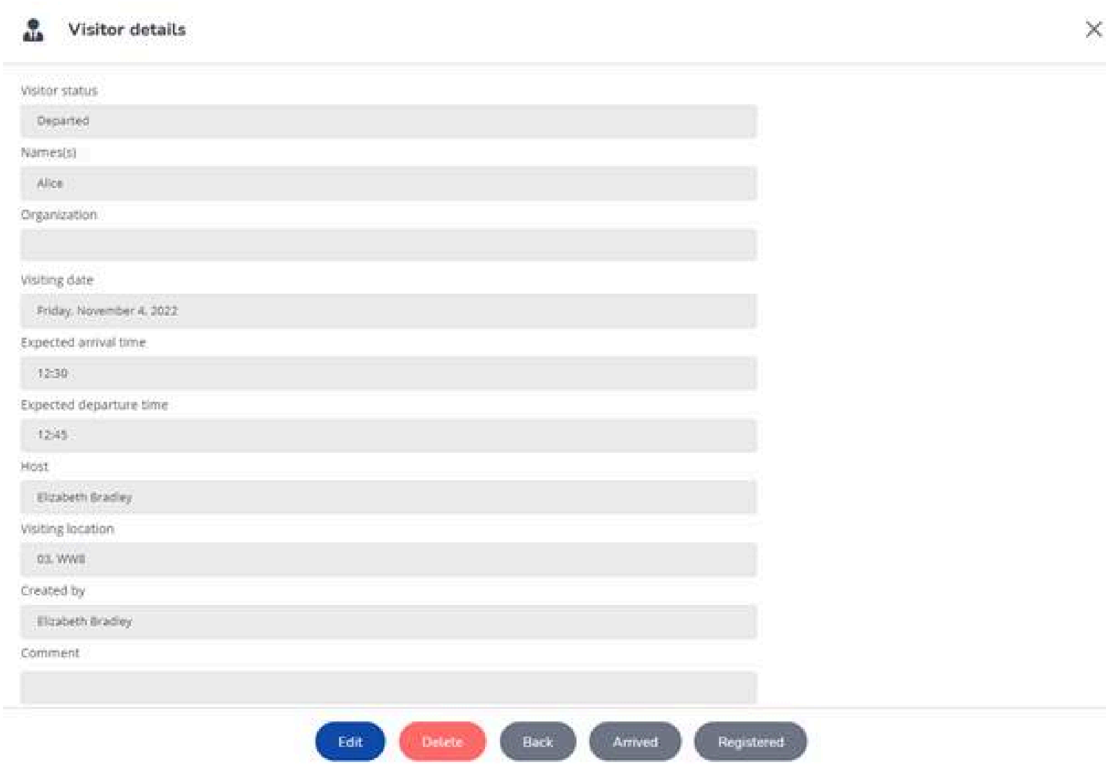
As Service Desk Persona the home page will present a fixed set of Dashboards. The titles of the dashboards are self-explanatory in most cases. Visitor log is not only a report but also a tool to manage your visitors.

## Visitor log

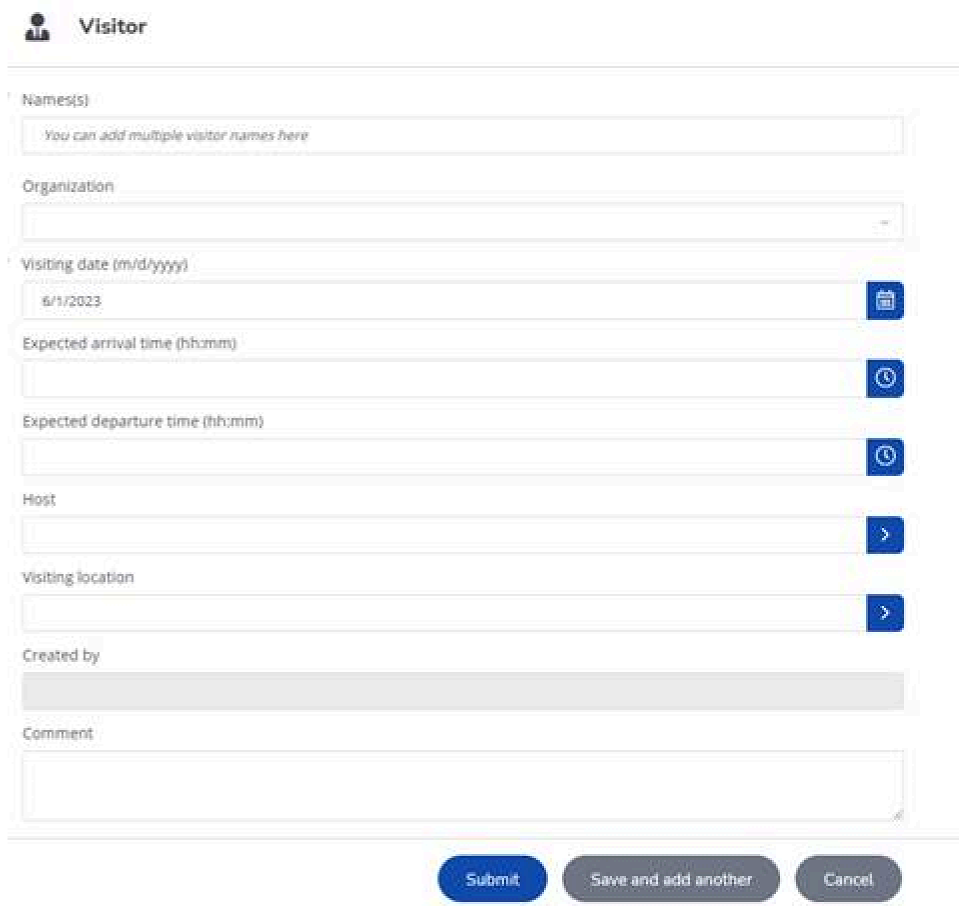
This report gives the Power user the possibility to filter on expected and registered visitors, but also to create new visitor logs via the button **Add new visitor**.




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'.




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




# Front desk

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.

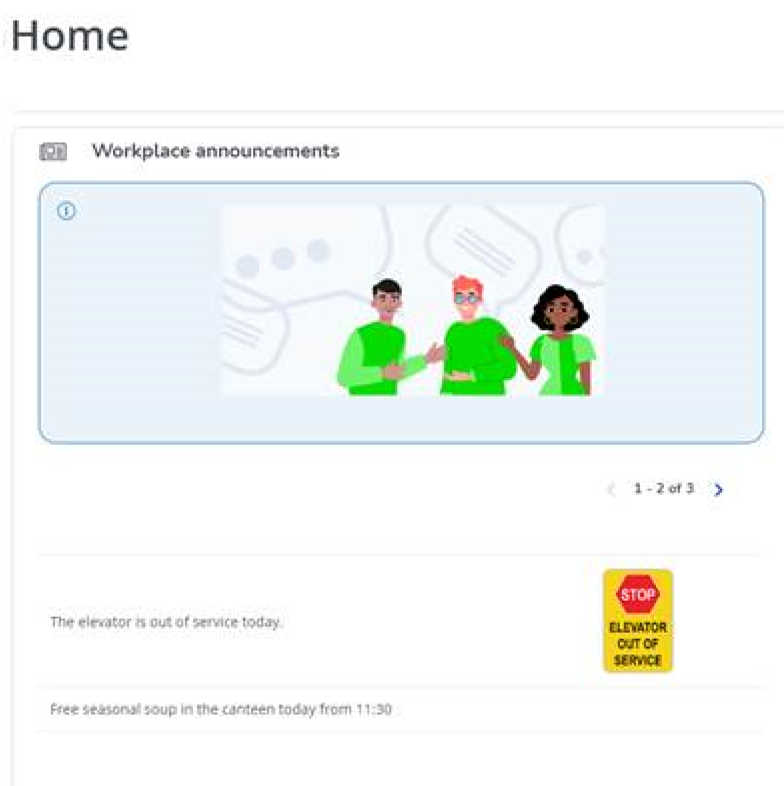
1. Navigate to **Announcements** TSI

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.`

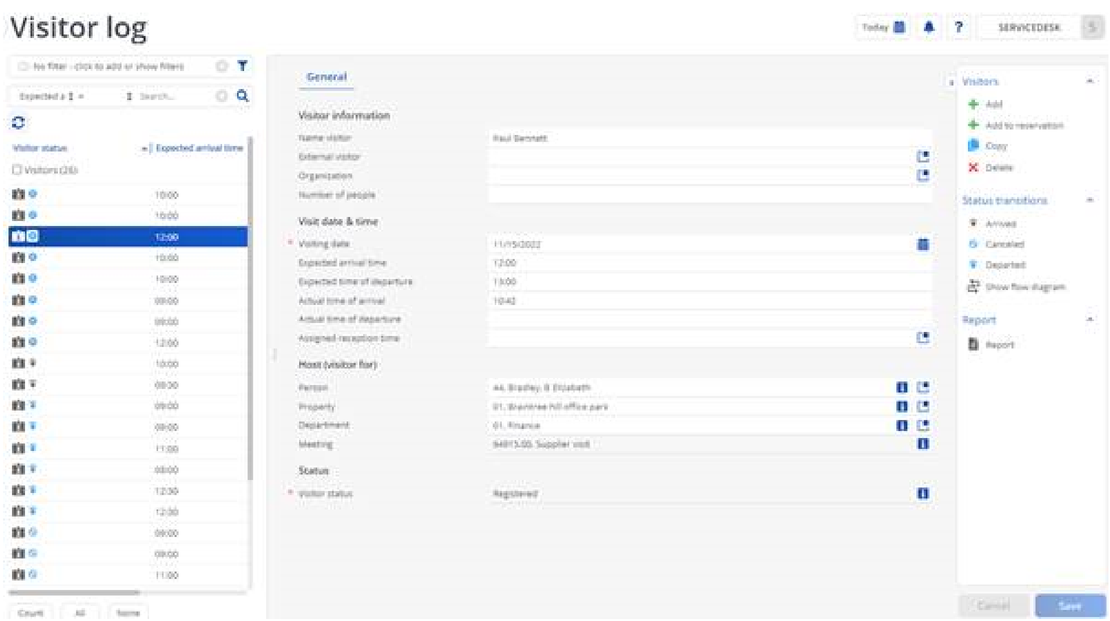
The end result of the announcement is visible for the building user and looks as follows:



# Visitor log

The launch item Visitor log can be used for:

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




# 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.

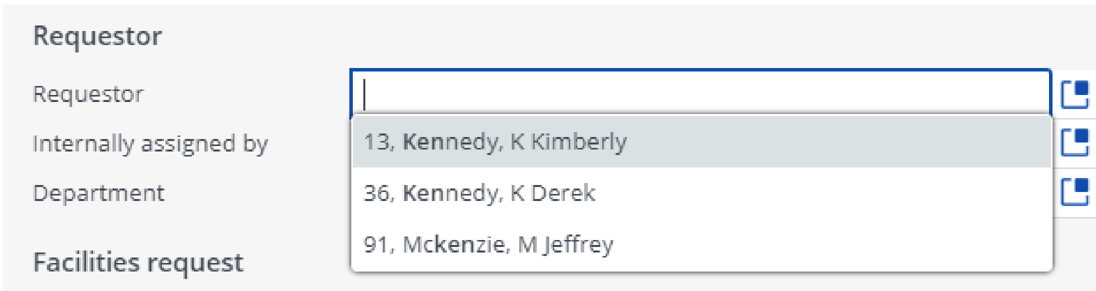
Via the action menu the Front desk persona can add a request and/or order. Every request and order has a certain set of data fields. The following fields refer to lists / tables that can be maintained on the ‘Base data (Front desk)’ Navigation center group:

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

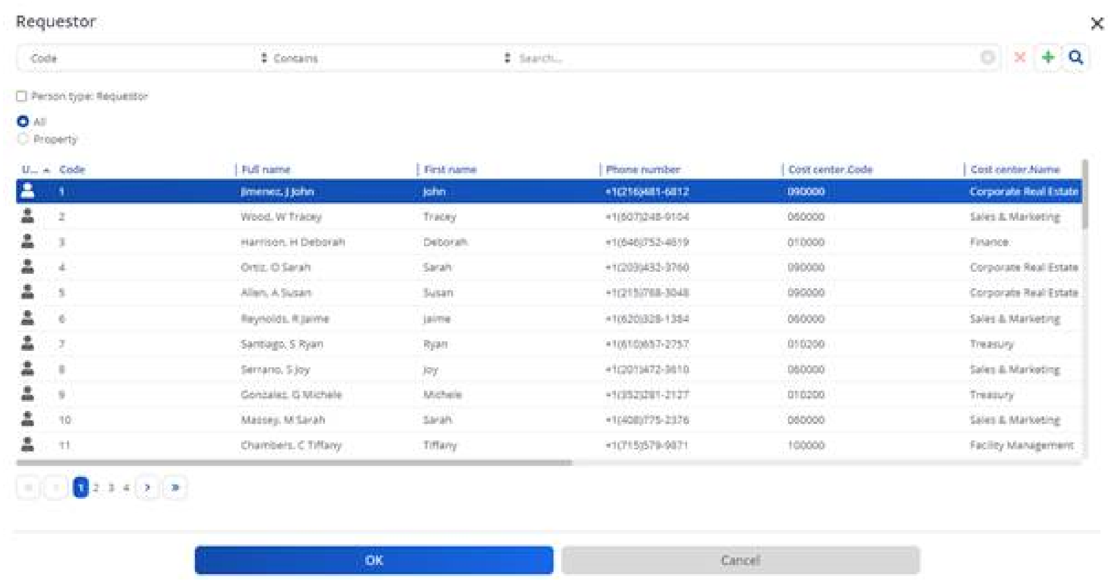
- Internal coordinator
- Internal tradesperson
- External tradesperson

**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.




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




**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*

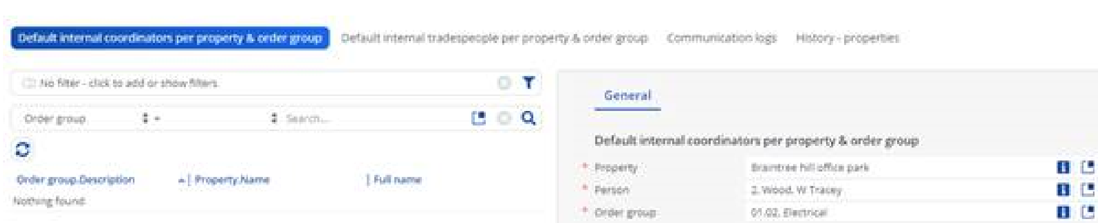
Priorities

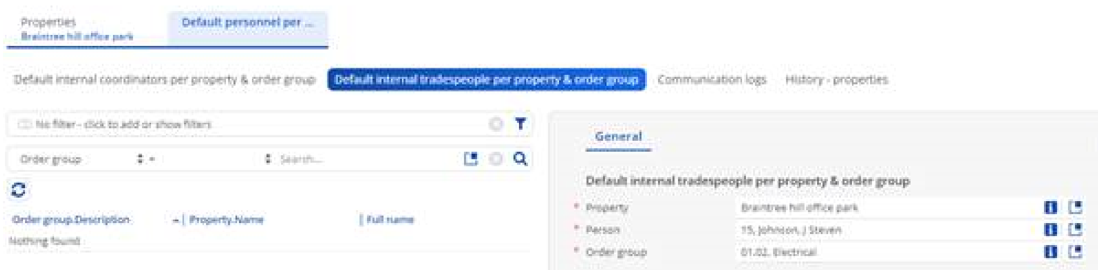
## Default personnel assignments

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:



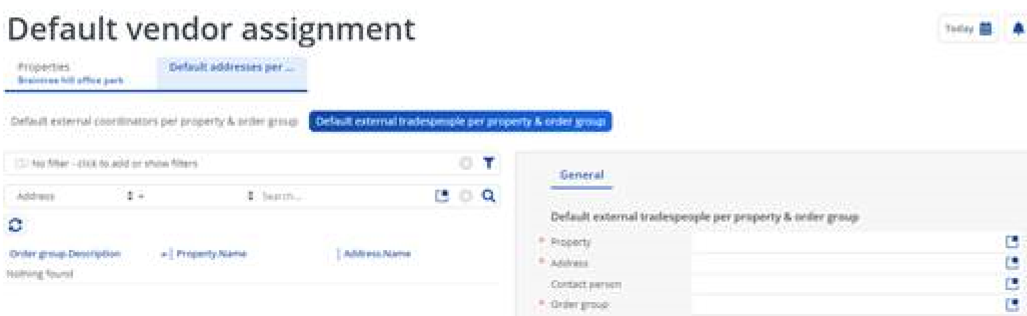



With these settings and creation of a request on building ‘Braintree hill office park’ and an order group ‘Electrical’ the field Internal coordinator will get the value Tracey Wood and the internal tradesperson will be Steven Johnsson.

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

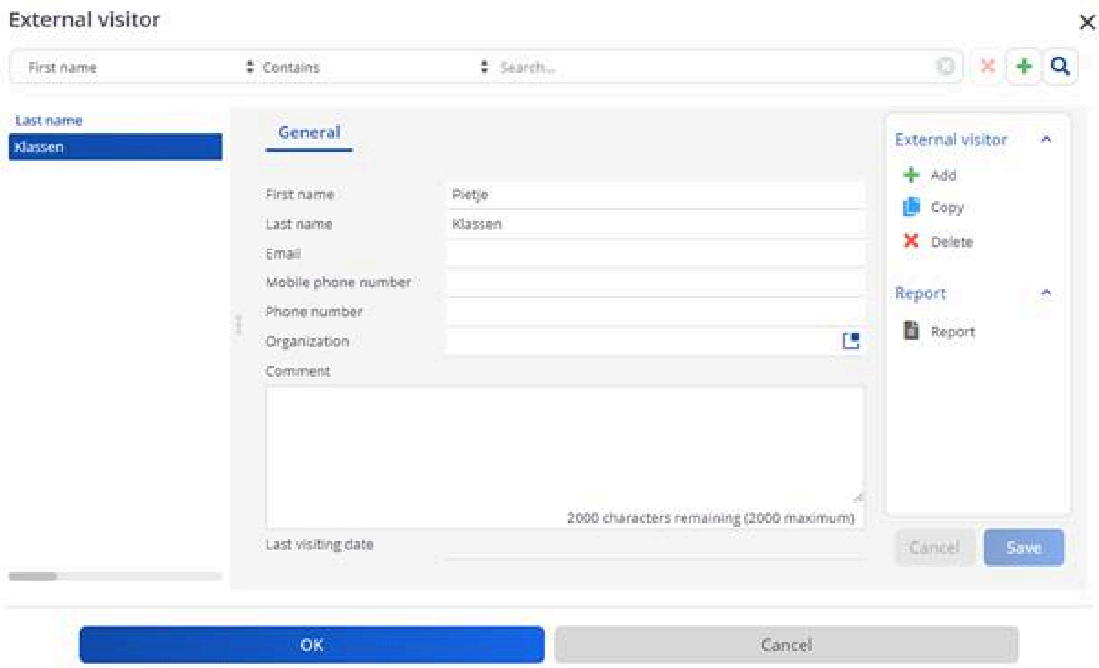
The principle of the default vendor assignment is equal to the above paragraph, only here we have to define an address (Organization) and possibly a person. The edition is using only the external tradesperson (not the external coordinator).




## 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.

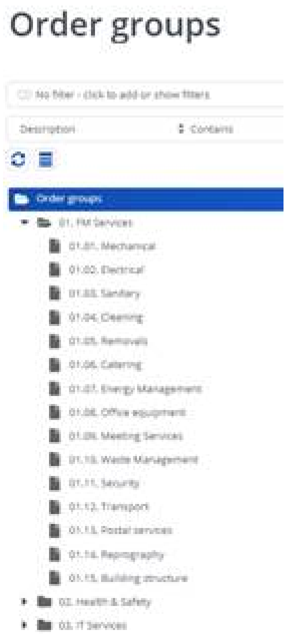



## Measurement units

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.




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.

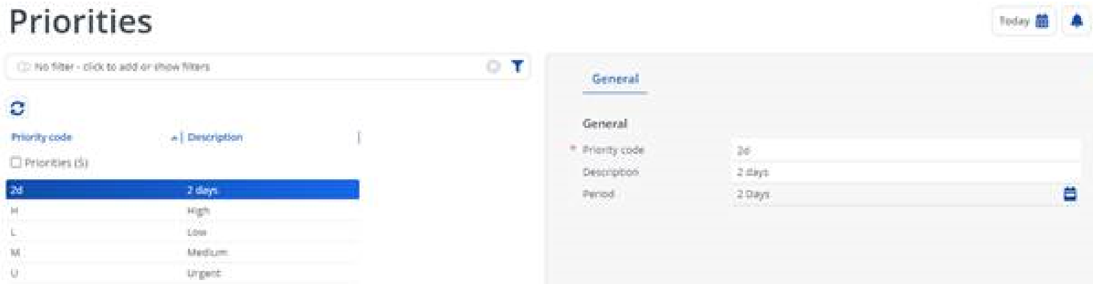
Proceed as follows to add a priority.

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.

5. 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.




## 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.

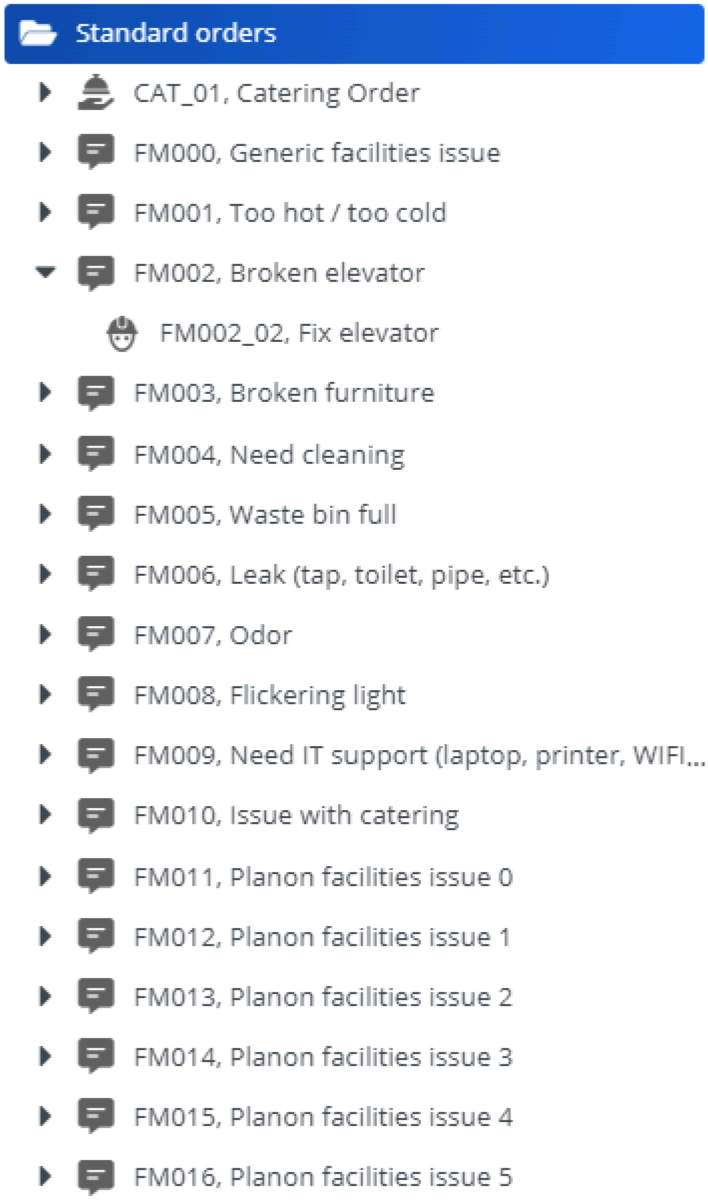
End users will benefit from applying standard orders in TSIs such as facilities and bookings.

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.

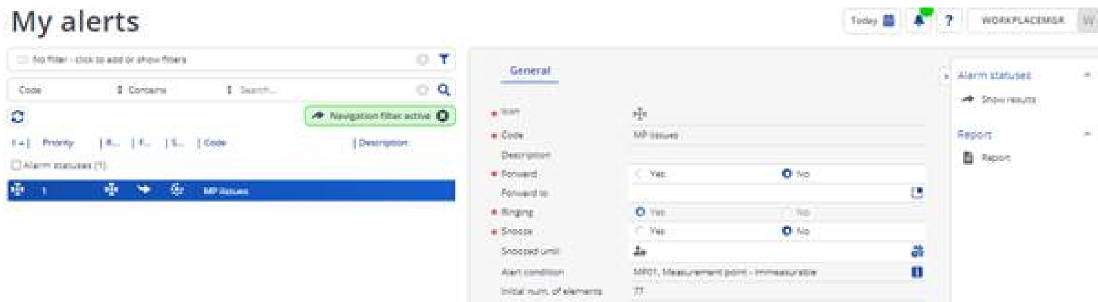
Beside the standard set, you can define your own attributes to these standards, such as:

- Priority
- Order group
- Show in app?




# 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**.



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.

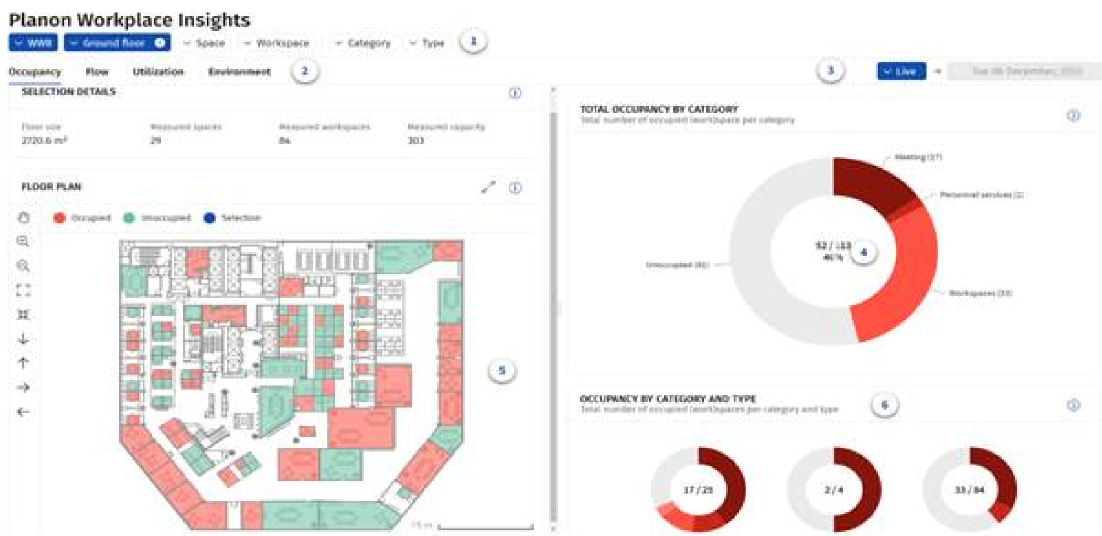
# Building Administrator

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

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

# Insights dashboards

## General



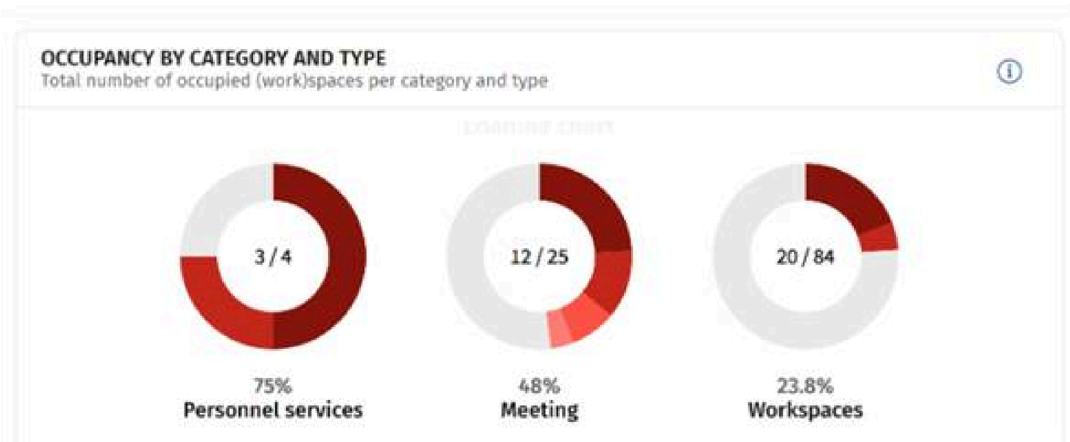
## *Live data*

### 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.

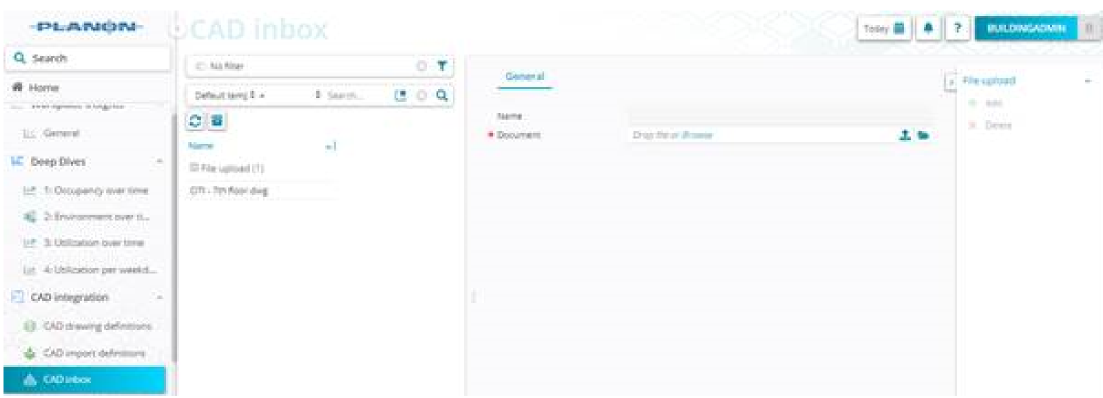
When a filter is applied, the top-right corner of each dashboard displays an icon.

# CAD Integration

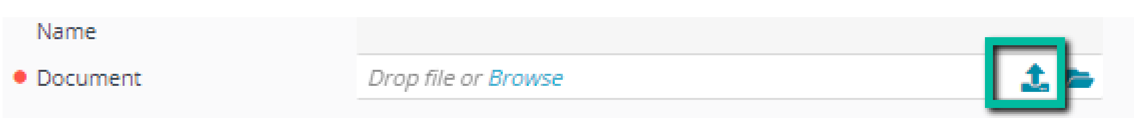


## CAD Inbox

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




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




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

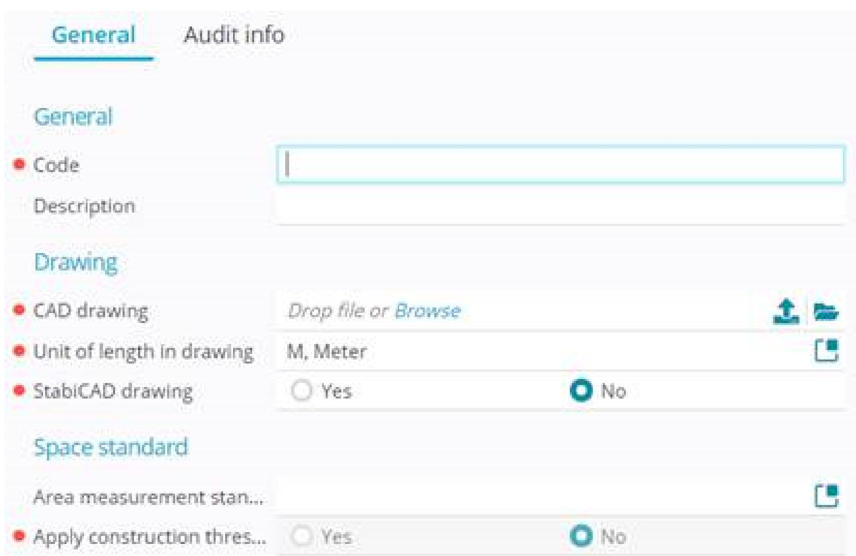
- When a drawing has an XREF drawing link, make sure you also upload the XREF to the same location.
- When a new Drawing (updated) is to be stored in the CAD Inbox, delete the old record and create a new CAD Inbox file. We are looking for a better solution.

## 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**




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 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 |
| M | 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

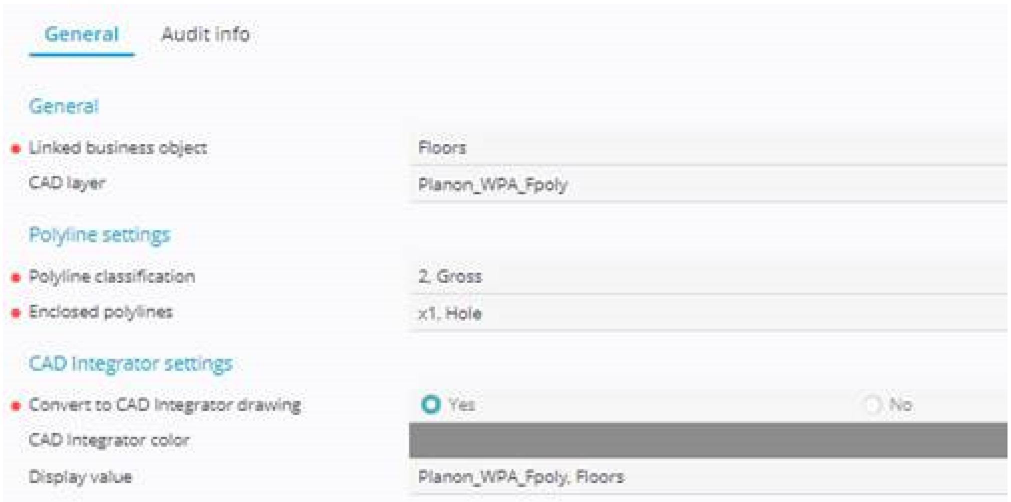
See the following example of CAD business object mapping per business objects.

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

## Floors

Polyline classification - > **2, Gross**

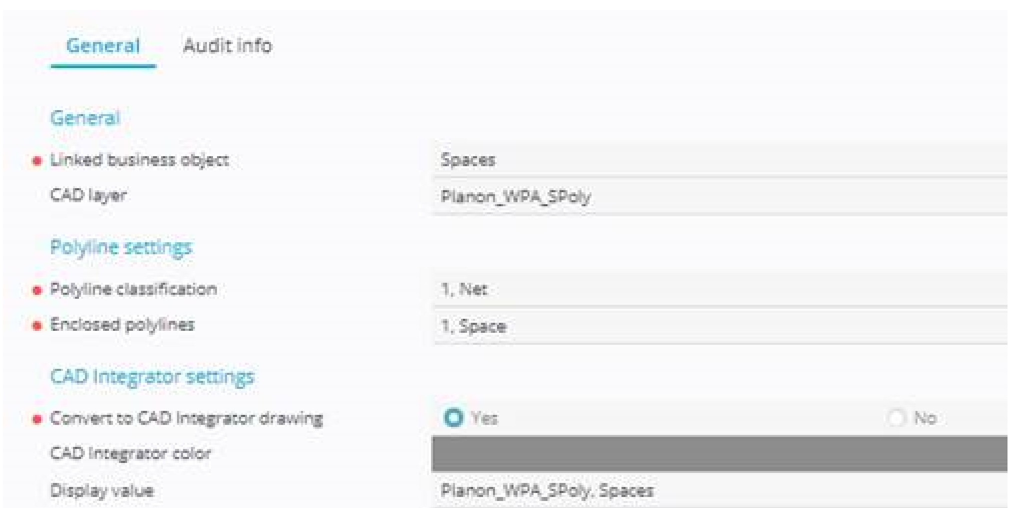
No field mapping required




## Spaces

Polyline classification - > **1, Net**

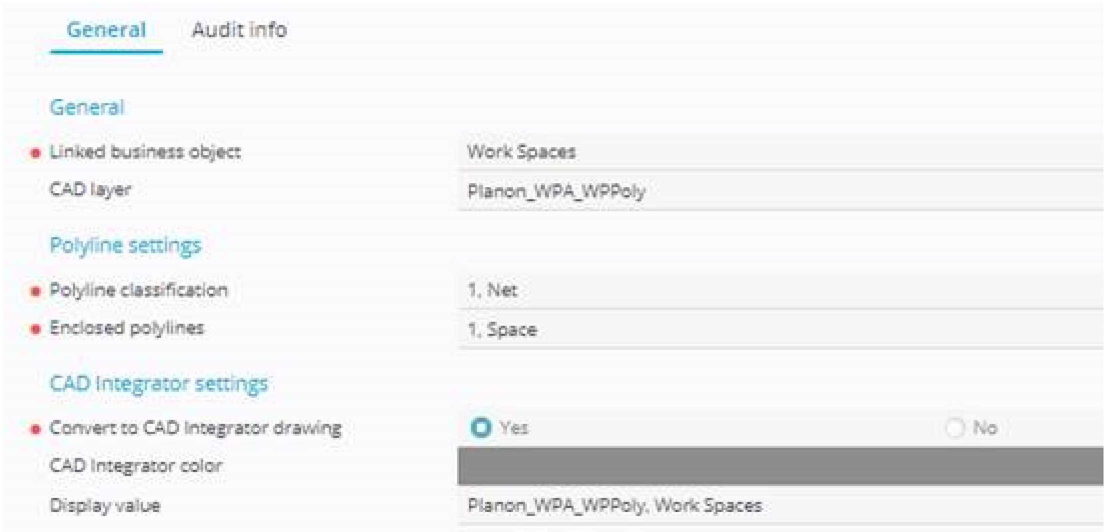
Field mapping required: Field mapping




## Workspaces

Polyline classification - > **1, Net**

Field mapping required: Field mapping




### Construction data

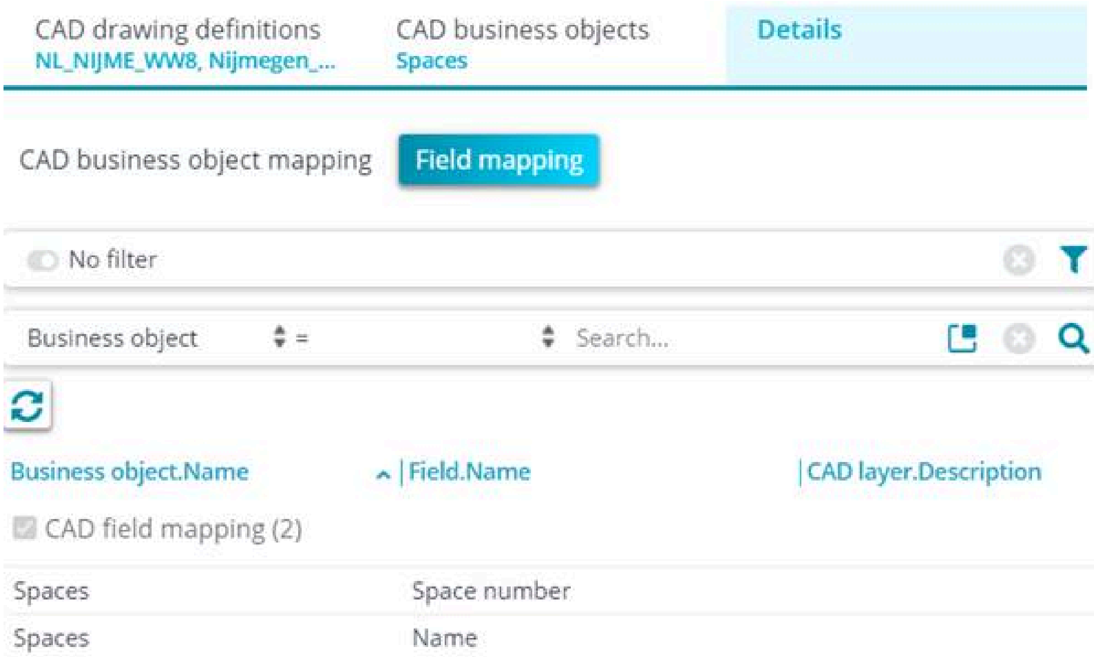
Destination CAD Integrator Drawing > **2, FM drawing**

No field mapping required

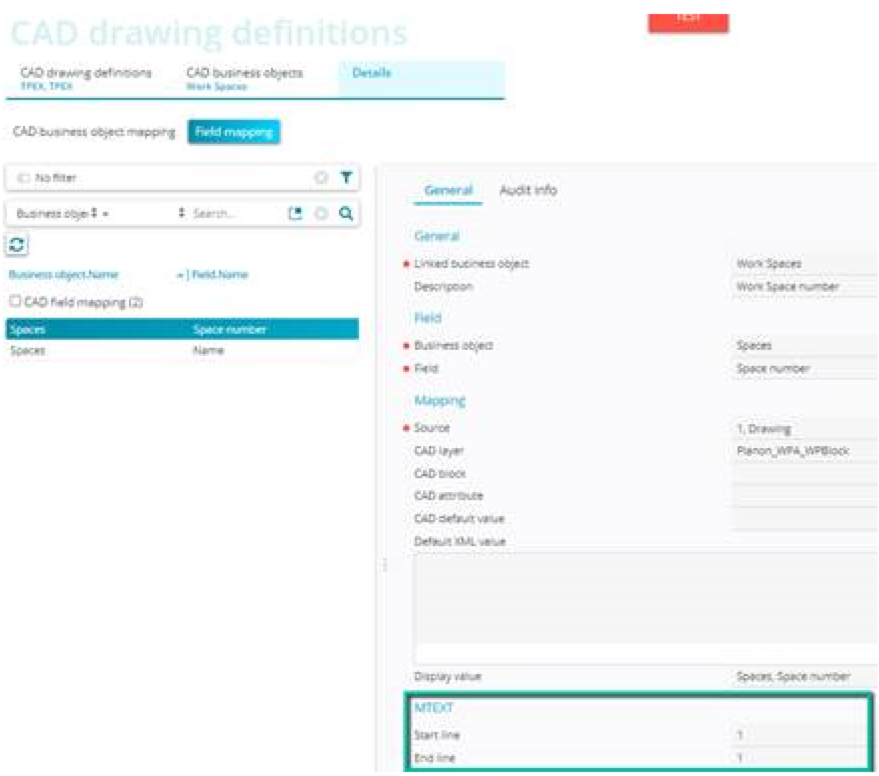

## Field mapping

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

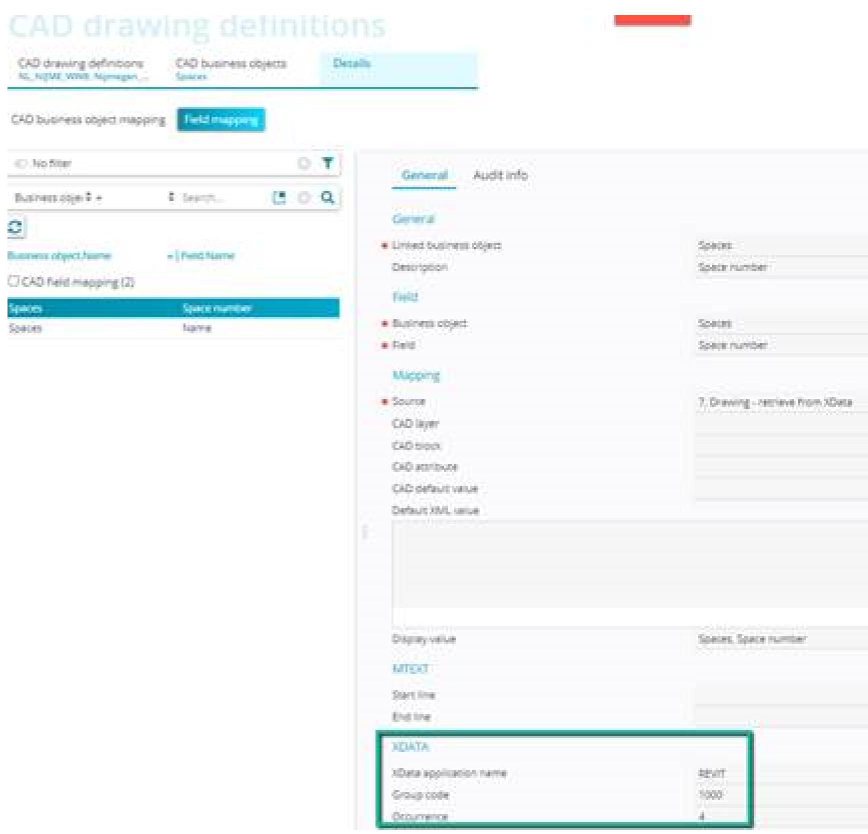
Define the CAD Layer where the (Work-) space number can be found in the drawing.



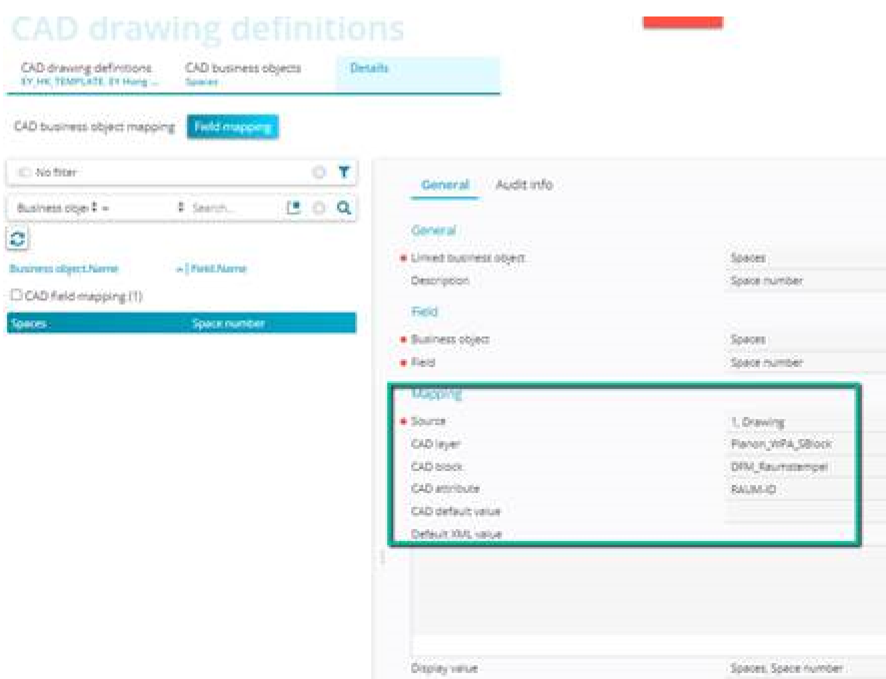

*With MTEXT*

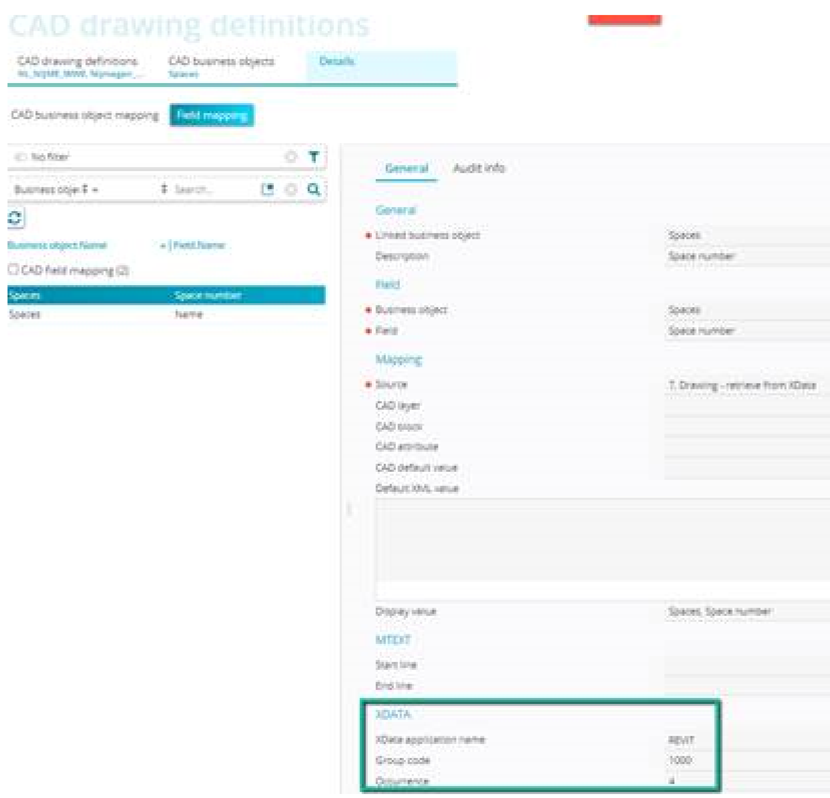



*With XDATA*




*With CAD Block*



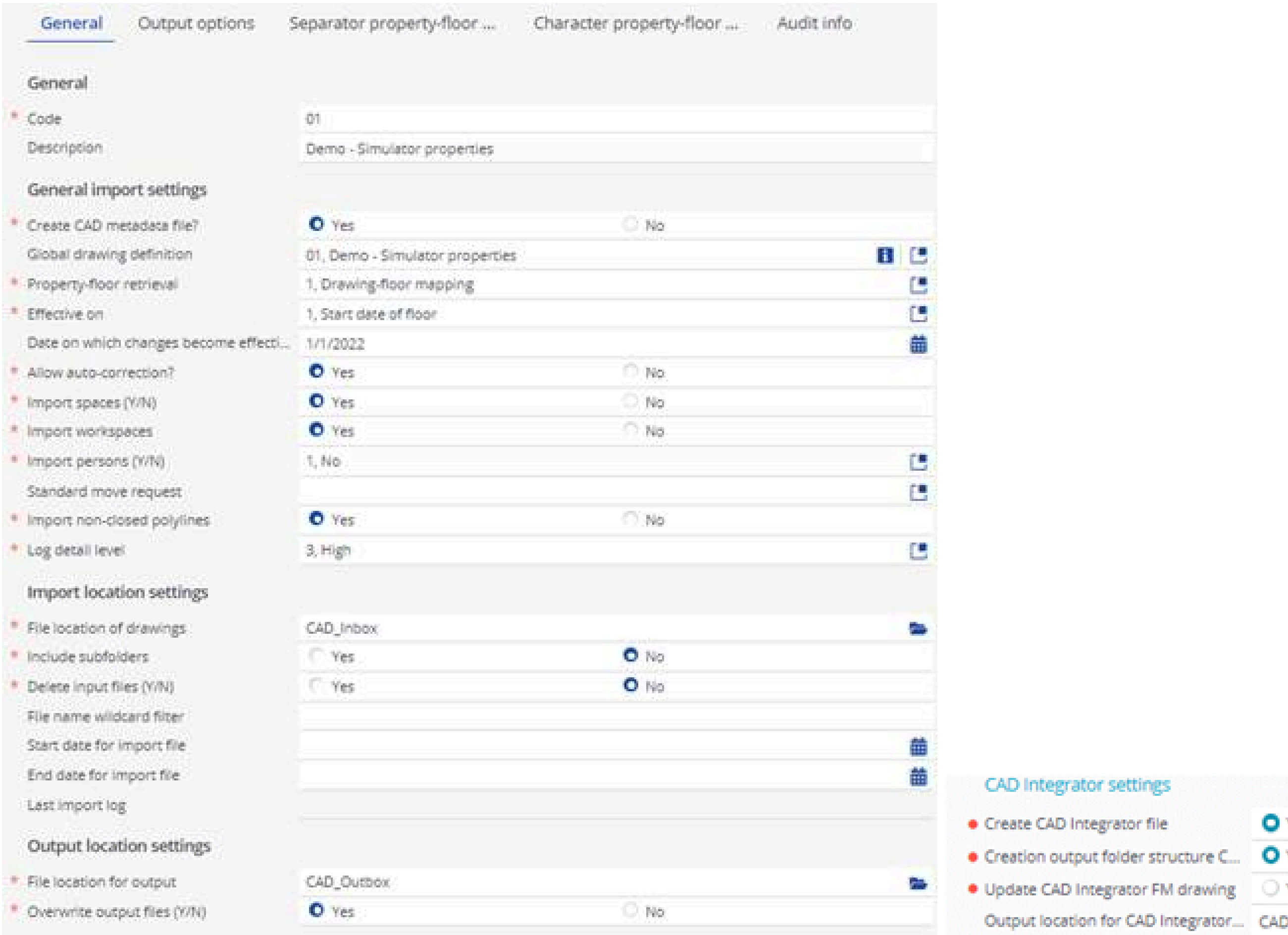


## CAD import definitions

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.




- **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.

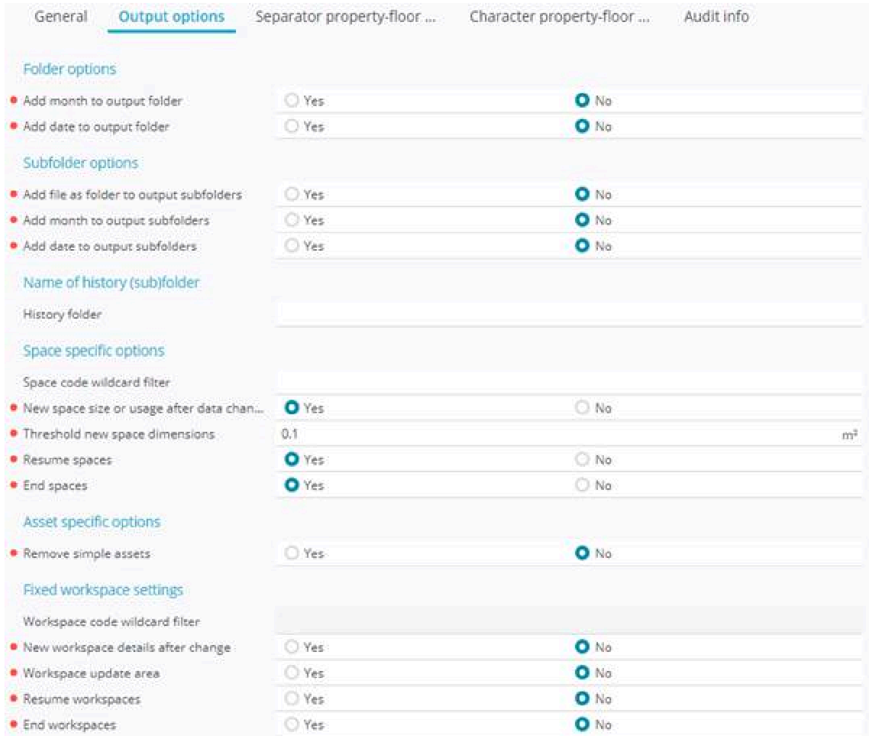
To reduce the complexity and number of drawing entities, the Planon application can automatically reduce the number of entities by joining polylines. By doing so, multiple polylines will be reduced to one.

### 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).

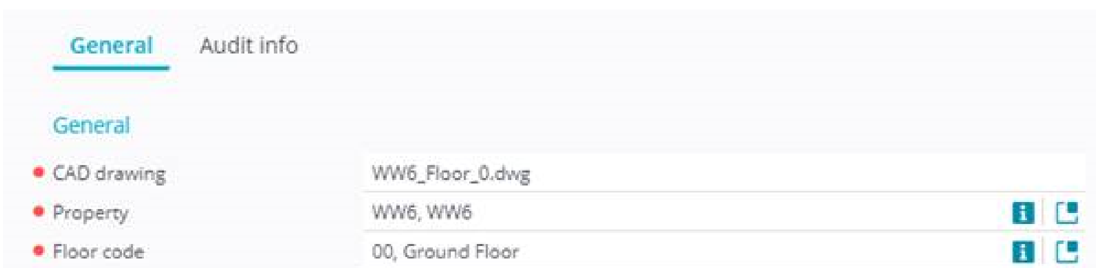
If the number of entities in a drawing exceeds 15.000 but is less than 300.000, a warning message is given in the verification log.

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

- 


### Mapping between drawing & floor

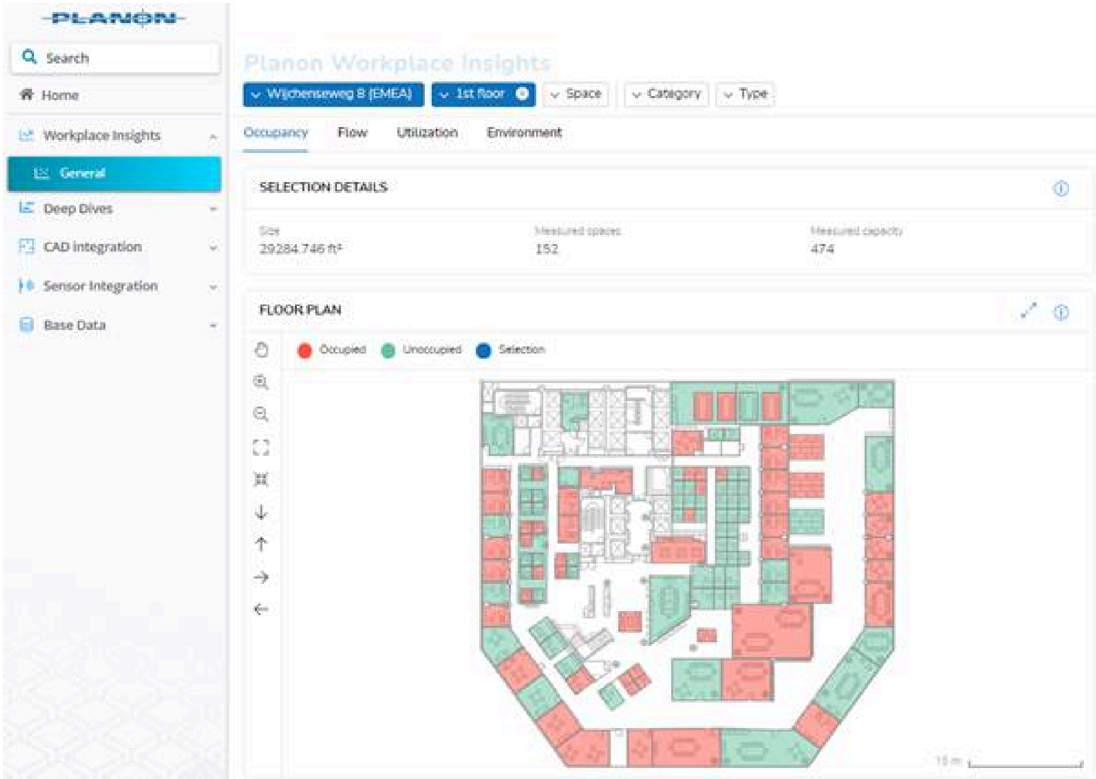
With this tab and fields, you will be able to select the correct drawing that is going to be imported and linked to the correct property and floor (of that building):




### 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

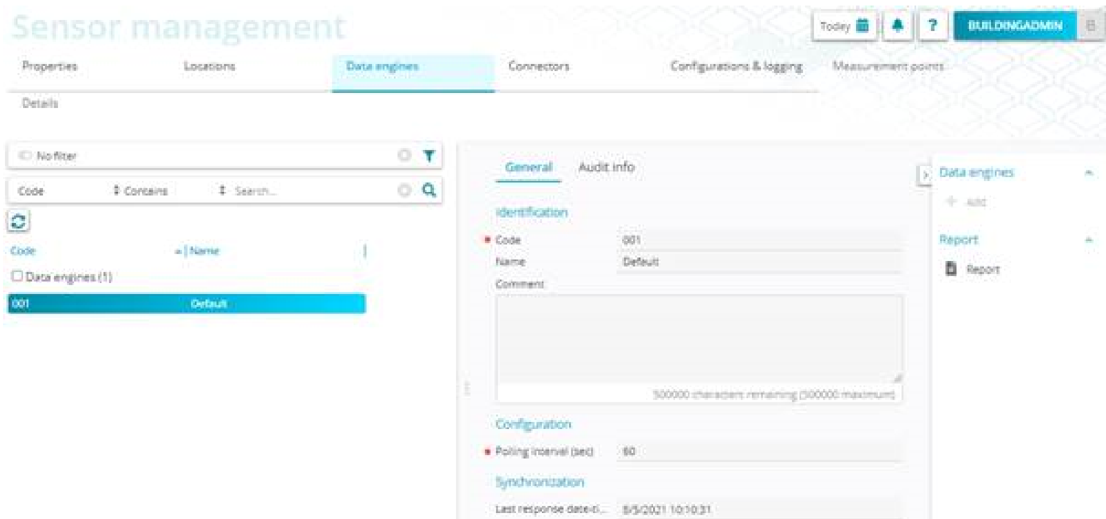
Sensor Management is the TSI where the final connection is made between Planon spaces and the sensor system. To be able to get the final connection, complete the following steps to get the right results.

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:

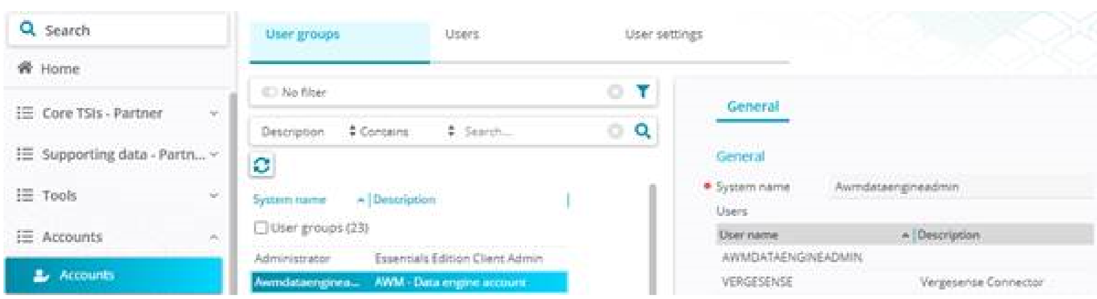
- Polling interval (sec) = 60
- Last response date-time = If that is today it seems to be running.




---

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**:

---




## Connectors

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.

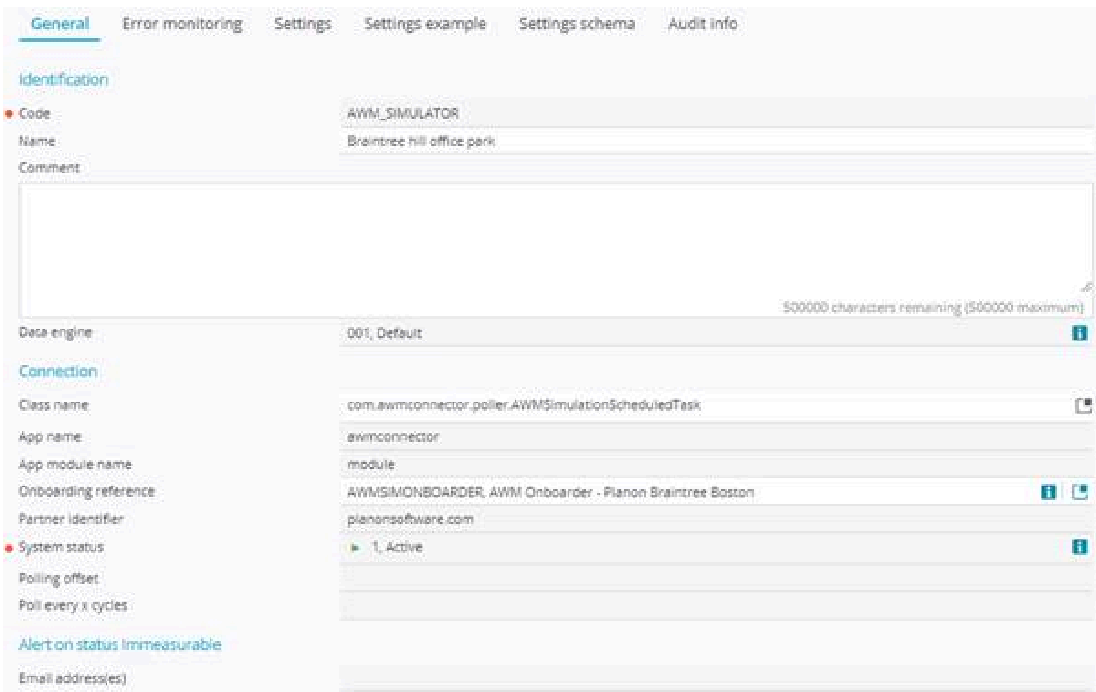
## Custom managed connector

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).

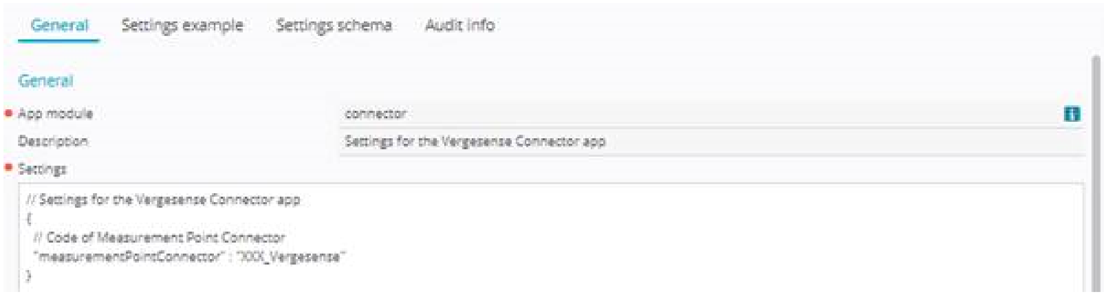
Create the connectors via Action button **Add Customed Managed Measurement Point**.

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.




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:



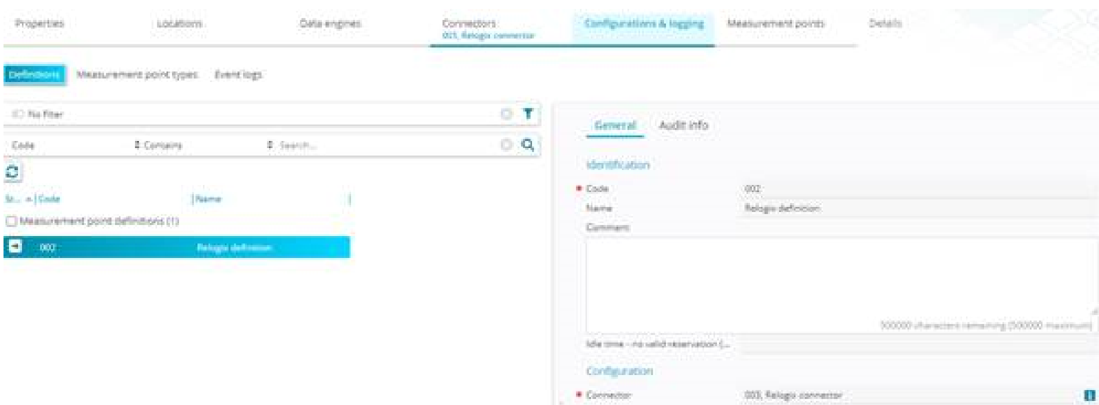

## Configuration & logging

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

Populate the following fields:

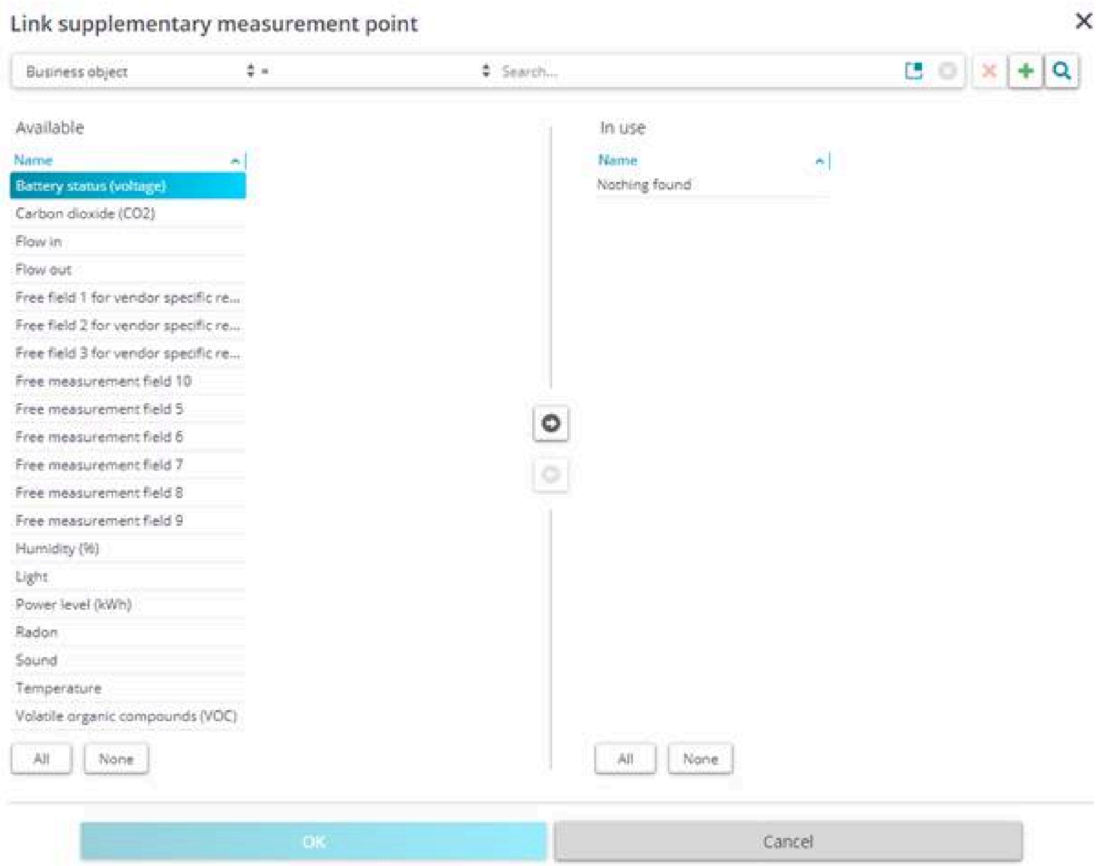
- Code
- Name
- Connector

Save the definition.




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.




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**.

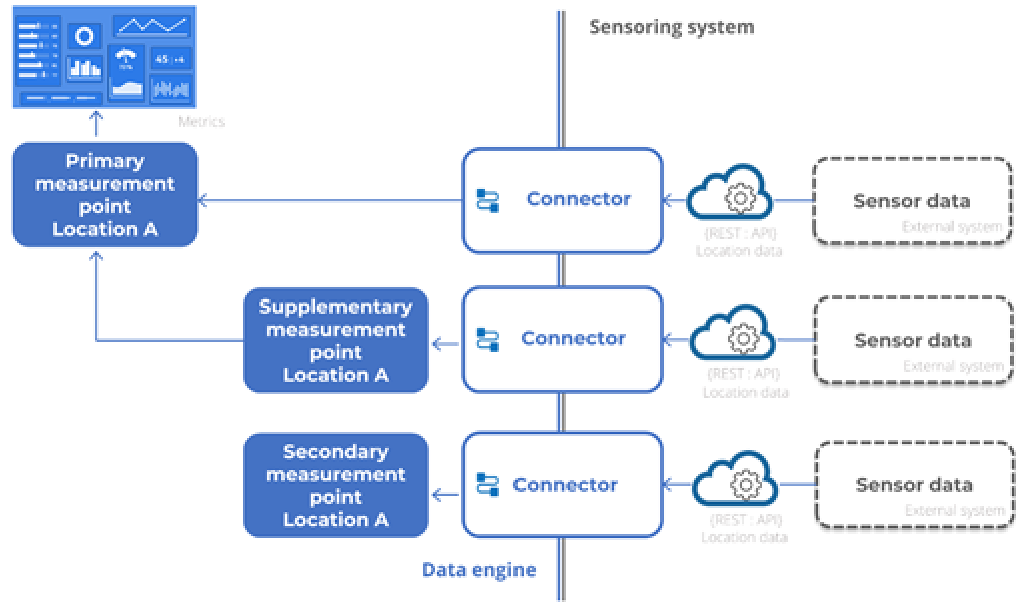
- Supplementary measurement point This type of measurement point is introduced to process data correctly when using multiple connectors per location. When doing so, it is important to ensure that data of one connector is not blocking the data of another connector. This is achieved by using supplementary 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

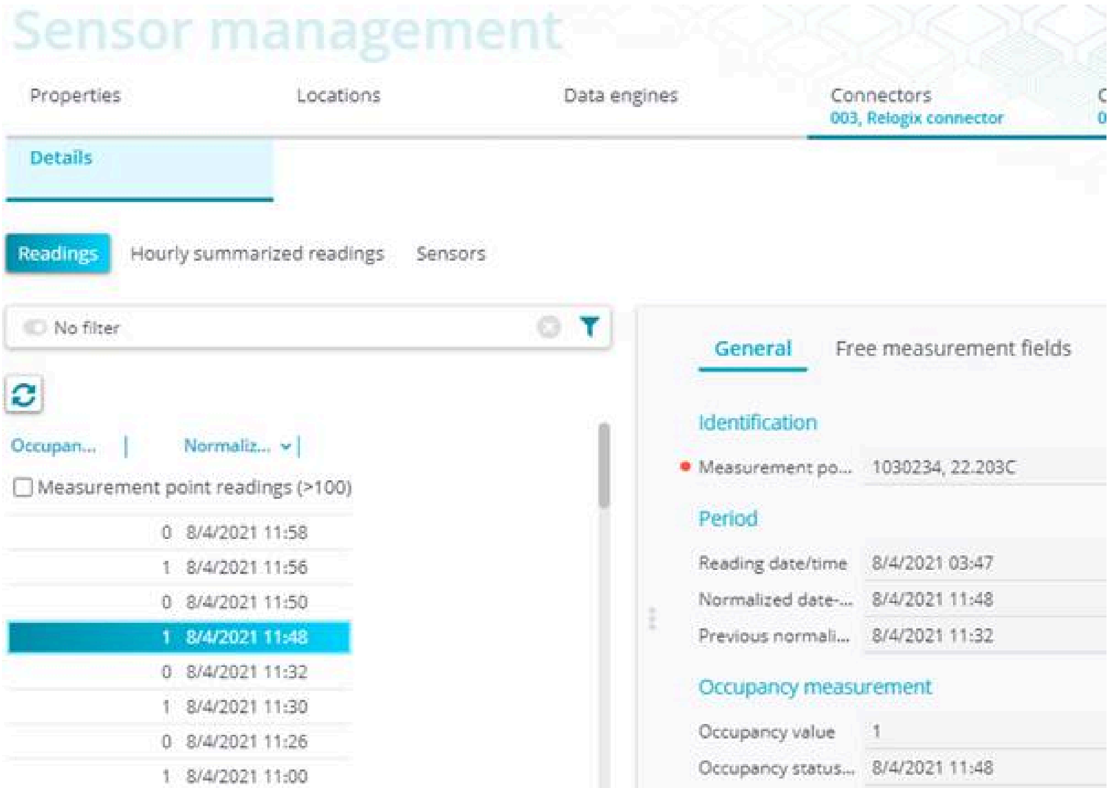
In this Selection level the final connection is made between the location and the sensor. For a measurement point you need to know the following values (fields):

- **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.




## AppCenter

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

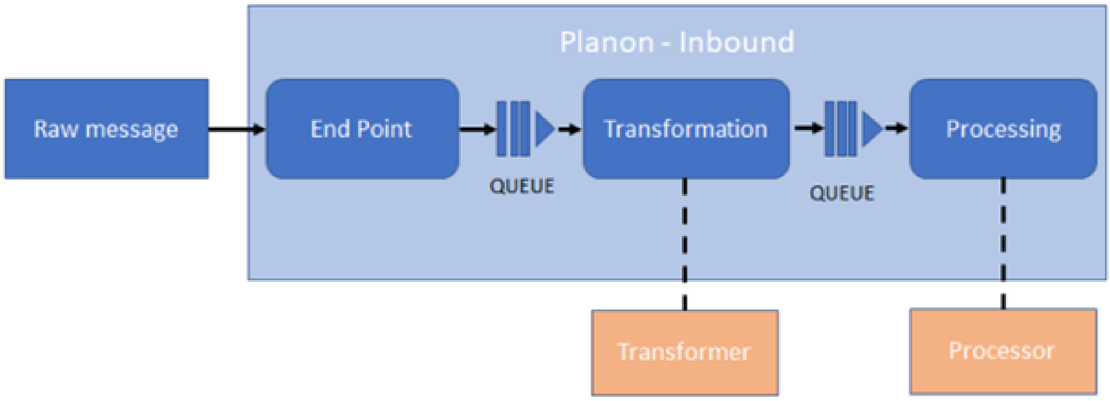
## Inbound (Raw) Messages

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.

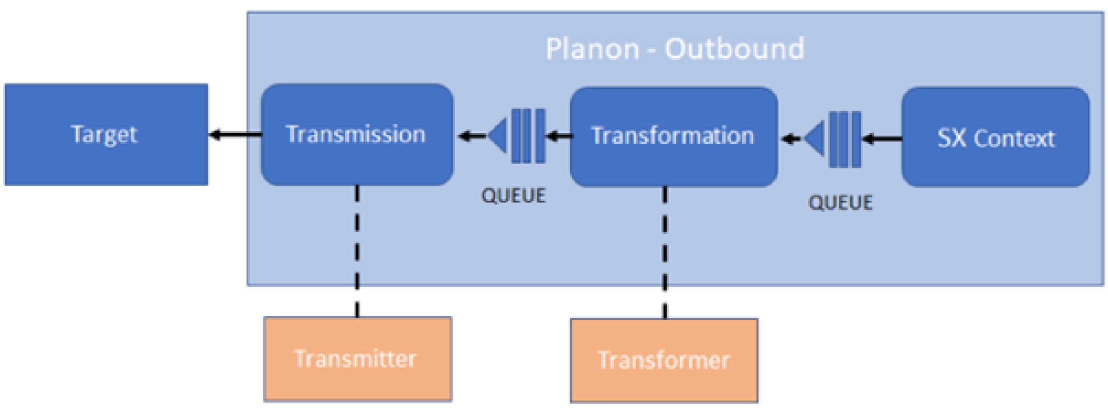
**Outbound**

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%.


# 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

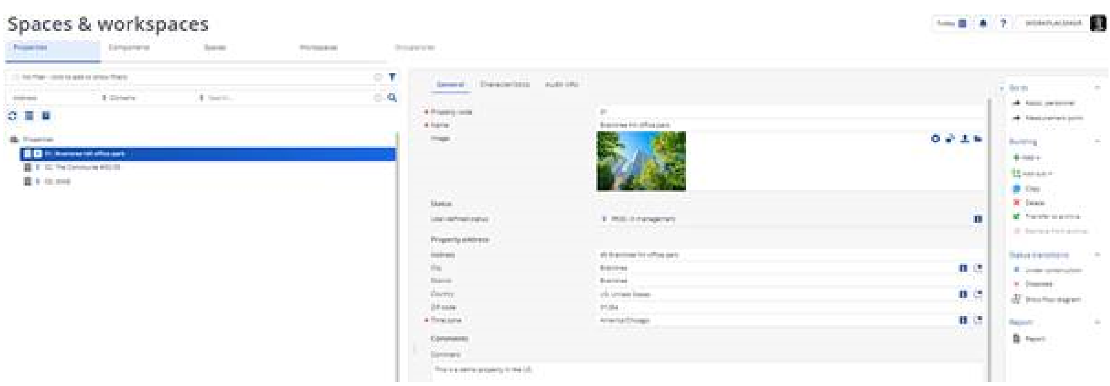
This TSI is to set up your property portfolio and the related floors, spaces, and workspaces.

## 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**.




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

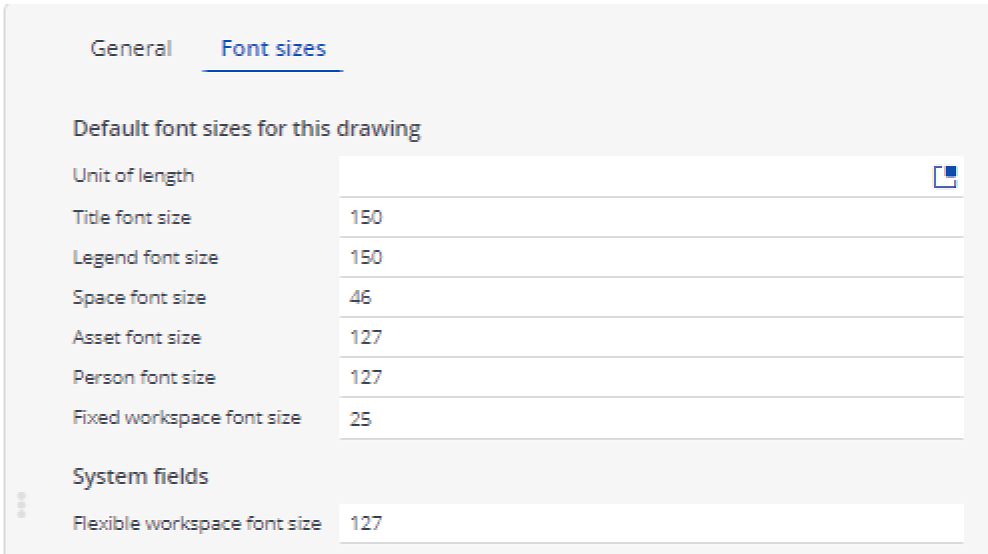
- City: Choose a city from the list (**Base data** (space) > **Cities**)
- Country: Choose a country from the list (This list holds all possible countries including the Country code)

- 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.

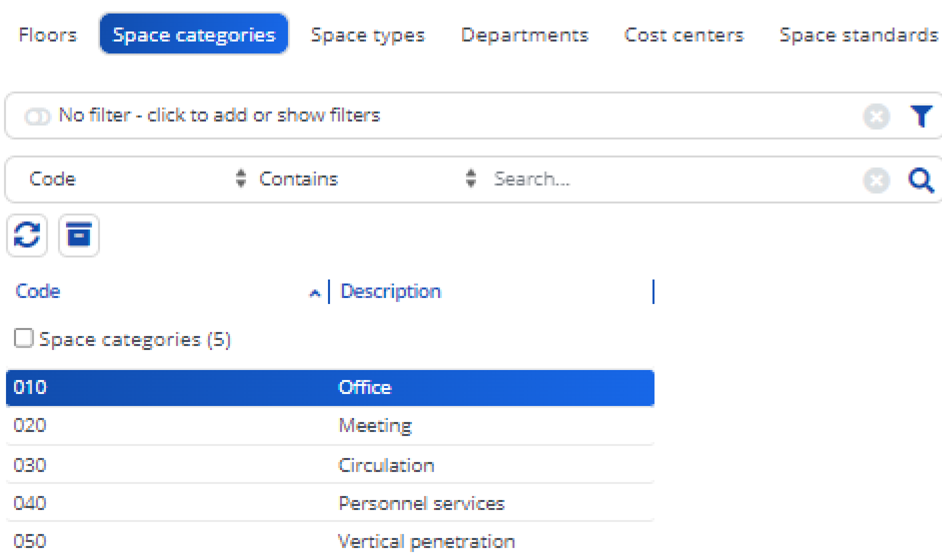



- You can view details of the floor via data view or the floor in CAD integrator view:

## Space categories

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




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**

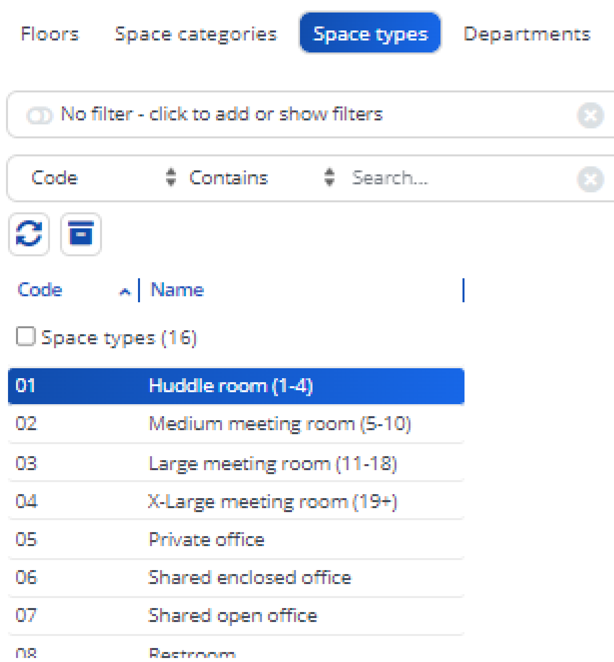
## Space types

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

---

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.

---



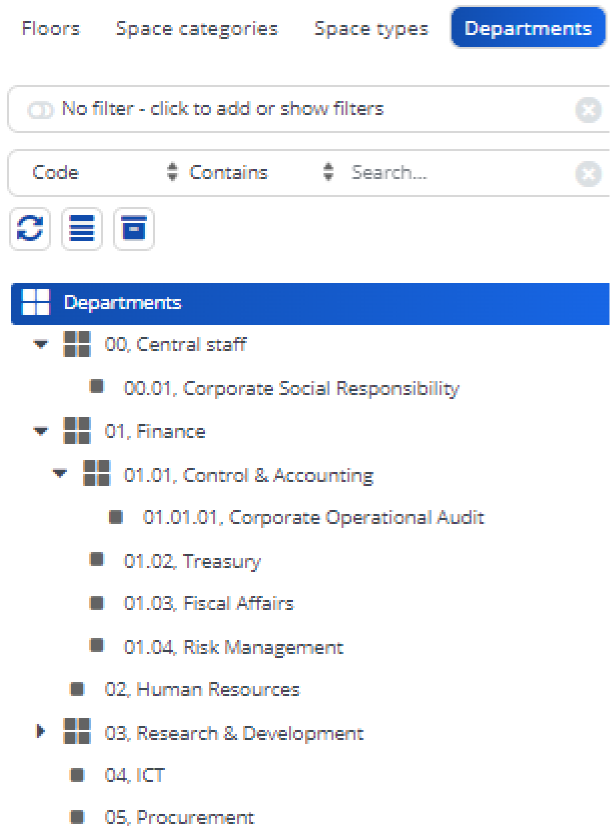

A space type can be linked to a space to group and report on it. This is used in for example:

- 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.



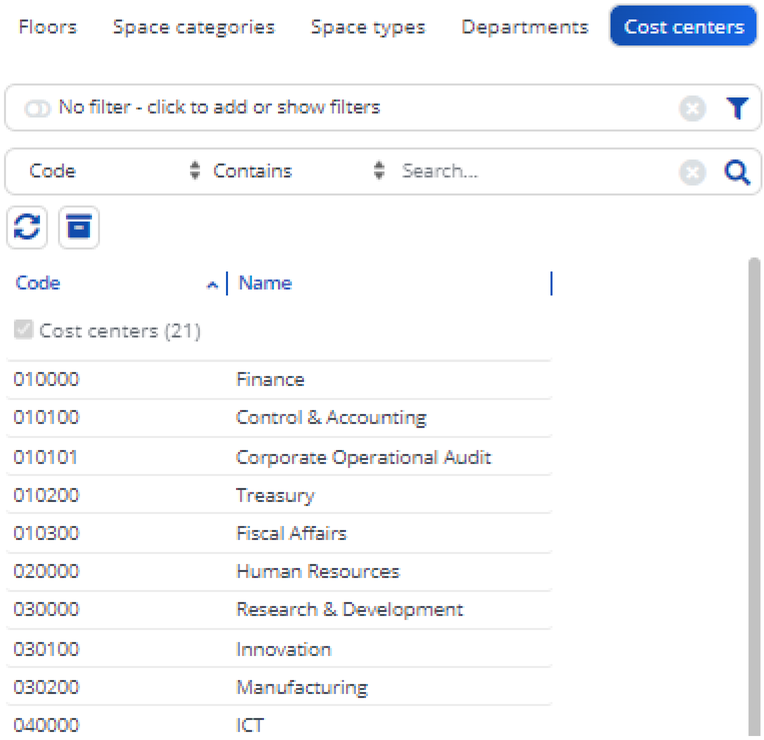

A department can be linked to a (work-)space to group and report on it. This is used in for example:

- Planon Workplace Insights Dashboards
- **CAD Integrator** > **Space mapping**

## Cost centers

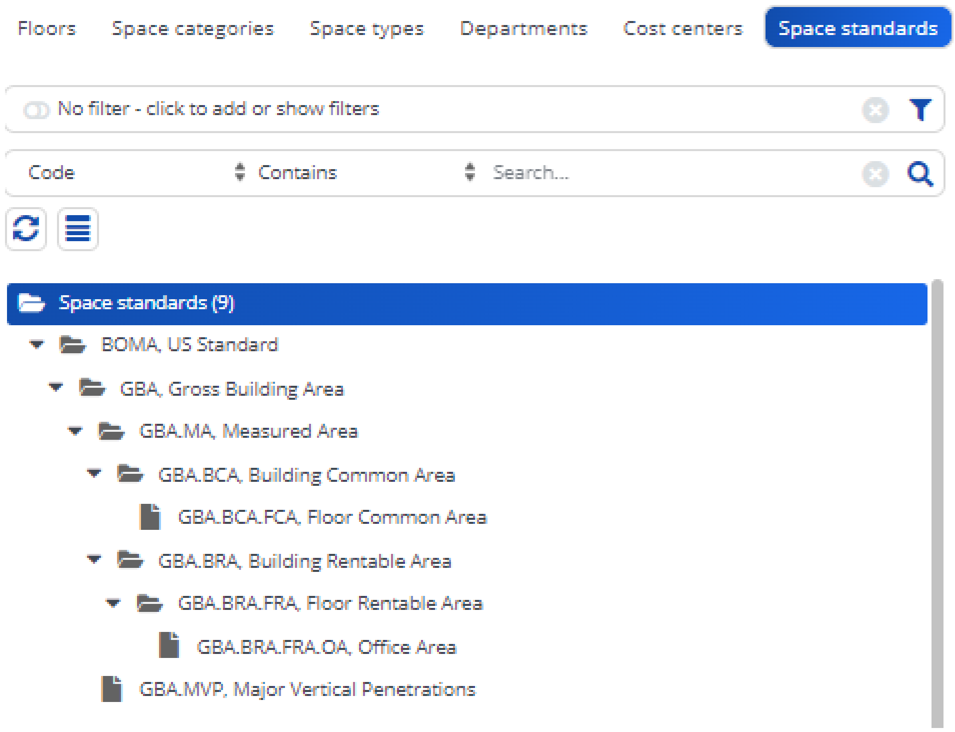
With this selection step you can filter spaces by cost center. Cost centers are units like departments which are used in cost accounting and to which costs can be charged.

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




## 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:




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.

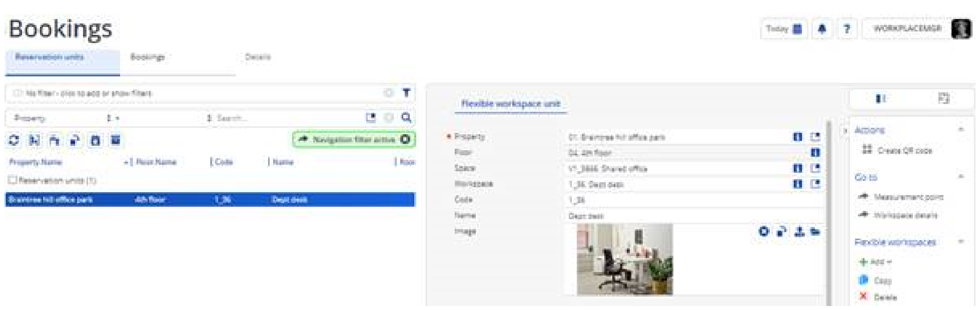
When workspaces are created via CAD Import, some data fields need to be populated so that information can be used for reporting and dashboards.

On workspace level the following is possible:

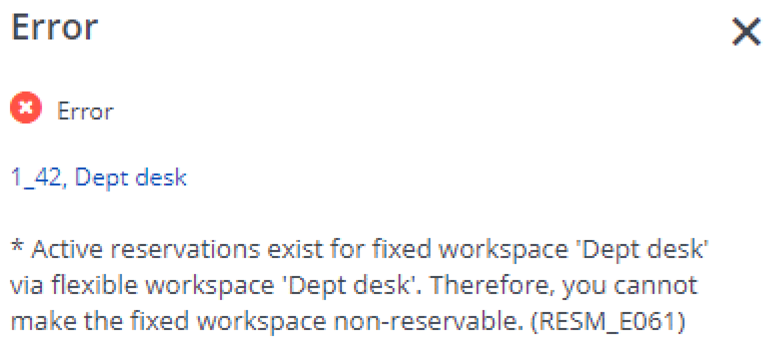
- Add, change code of the workspace (**Advise not to do so if CAD drawing is the source**)
- Add, change name.

- 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




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




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

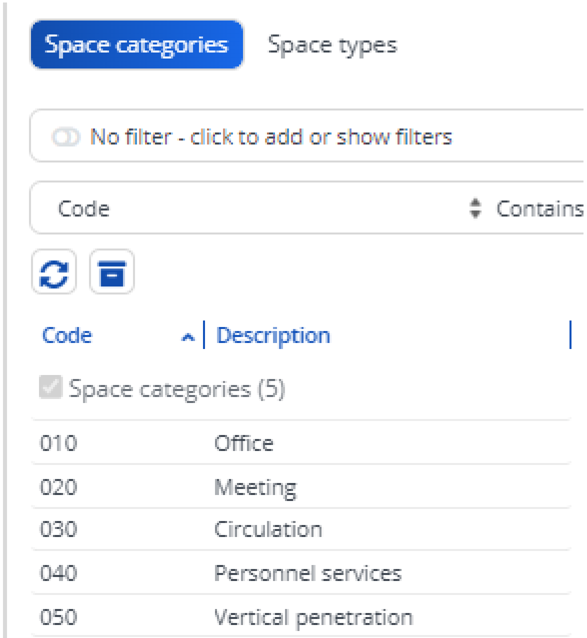
Actions available:

- '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

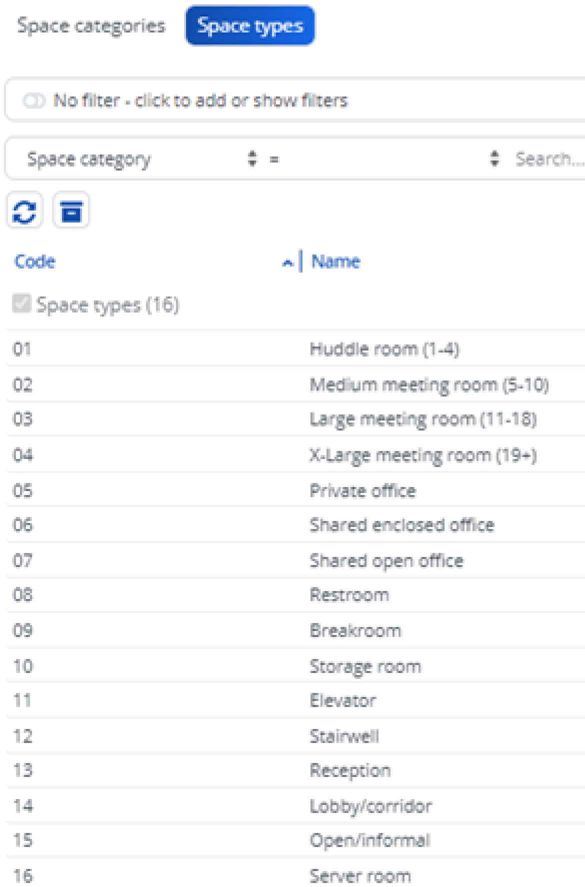
Here the Building administrator can manage the lists of Space Category and Space types.

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




## Space types

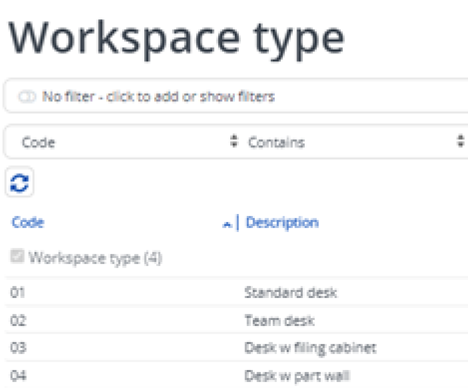
Per Space category there are space types available. It is important to define the correct space type to the space category. A predefined list is available, but also here the Building administrator can adjust and maintain.




| Code | Name |
|---|---|
| 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 | Stairwell |
| 13 | Reception |
| 14 | Lobby/corridor |
| 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.

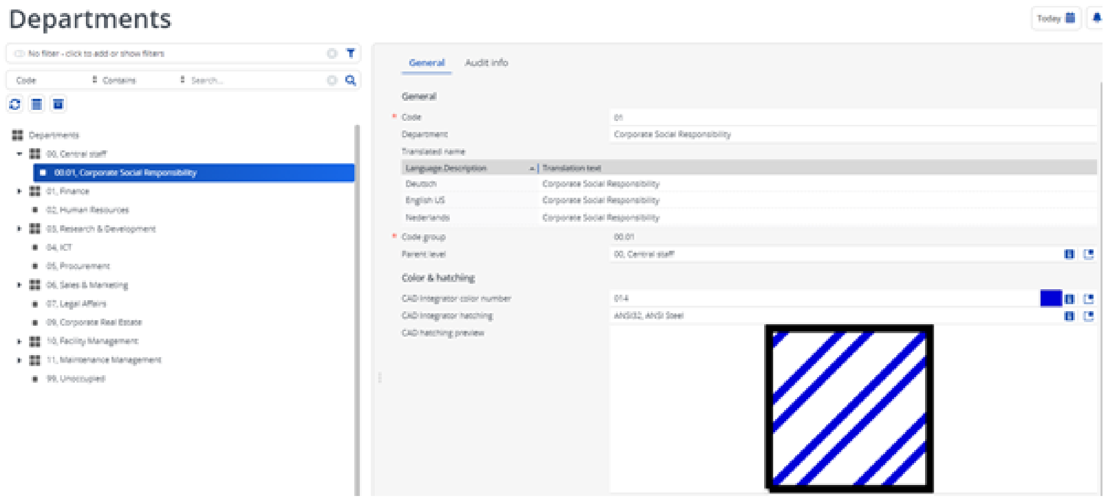



| Code | Description |
|---|---|
| 01 | Standard desk |
| 02 | Team desk |
| 03 | Desk w filing cabinet |
| 04 | Desk w part wall |

## Department

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

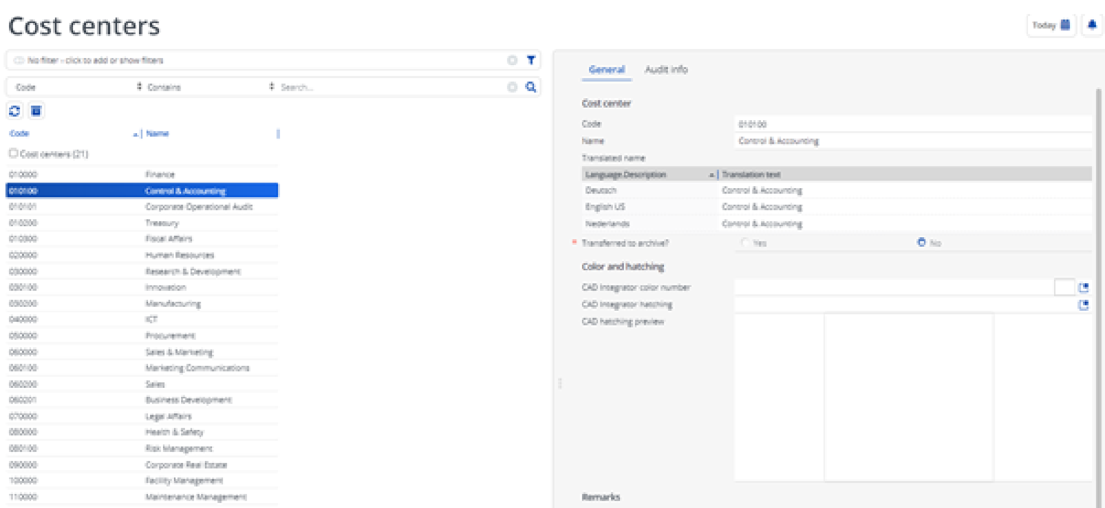
The Building administrator can create the list manually or via available SDI import sheets.




## 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.




# 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.

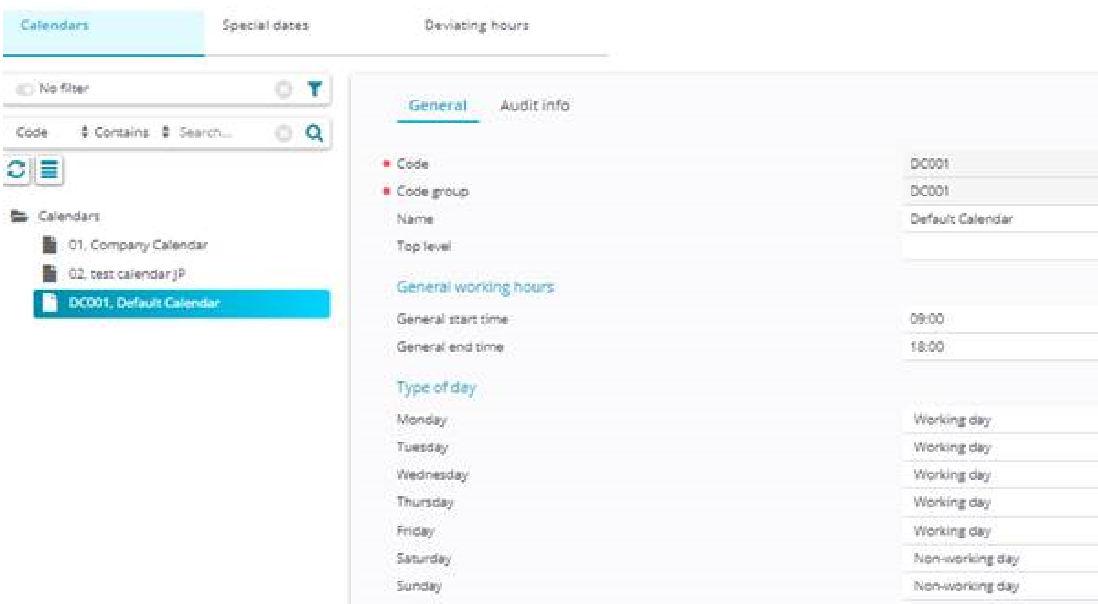
- Working days
- Different start time & end time (e.g. opening hours of the building)
- Special dates (e.g. public holidays per country)
- Deviating hours (e.g. On weekdays opening hours are different than on Saturday)

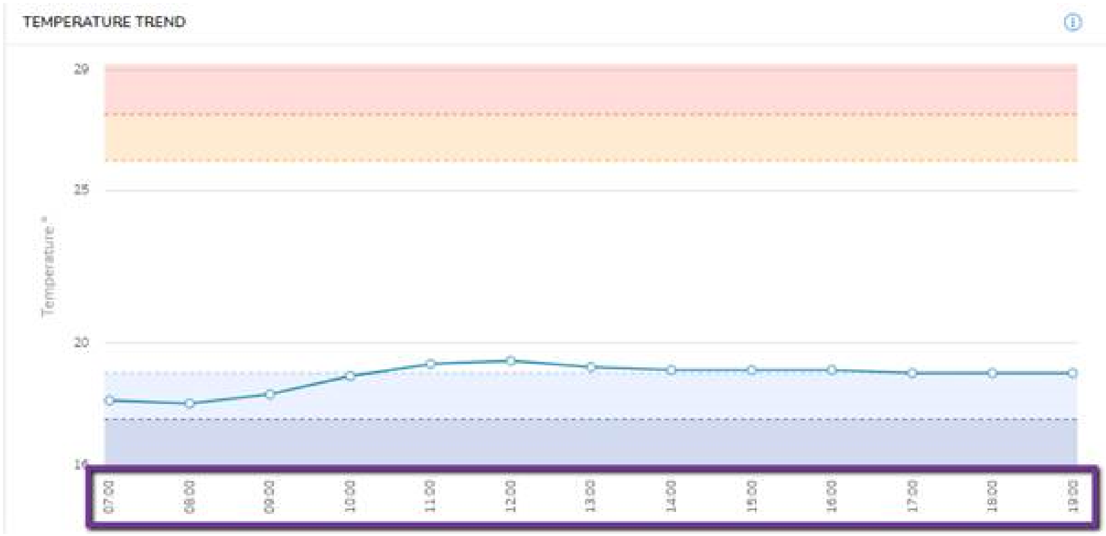
Based on discussions with customers, Calendars can be created manually.

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:






# 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:

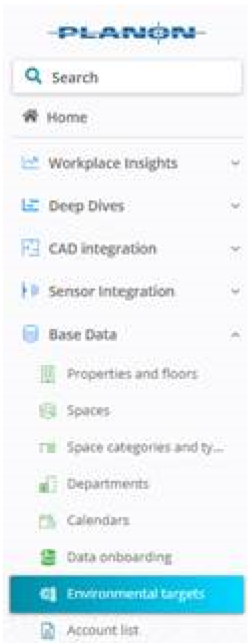
- City
- CostCenter
- Position
- Department
- SpaceCategory
- SpaceType
- SpaceStandard

- 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

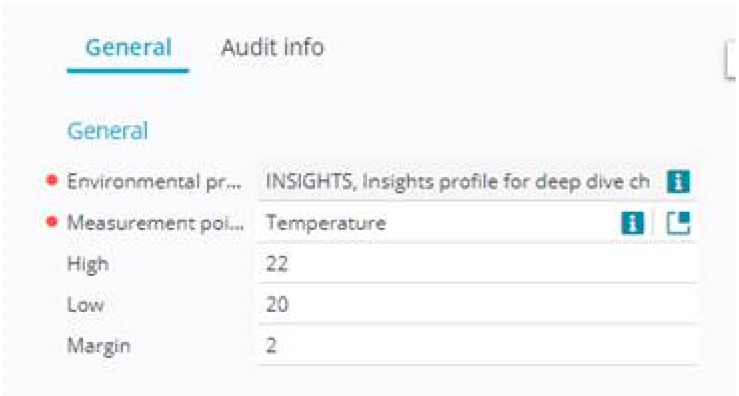
To be able to see the targets / margins on environmental readings and results the targets can be defined in this TSI.



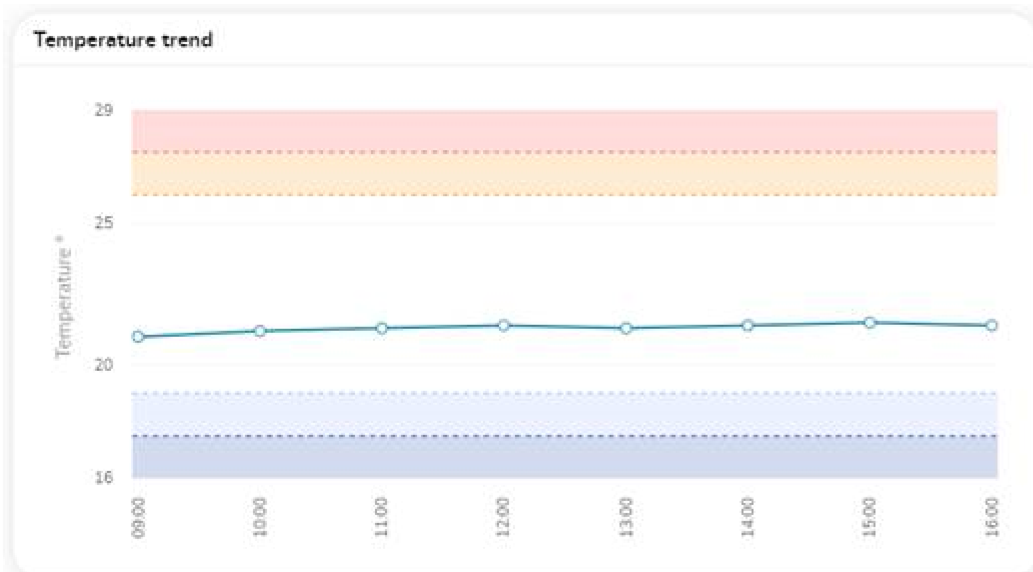

There is a default profile available, called INSIGHTS. When navigating to the **Target values** level you will find a predefined set of Environmental targets. Per target you can define/change the following:

- High
- Low
- Margin

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



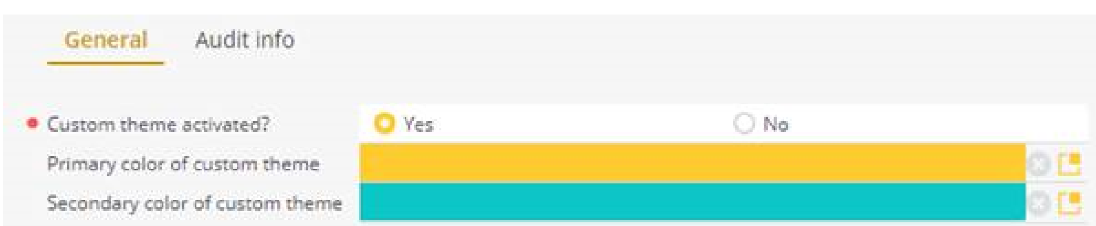

**Result:**




# Themes

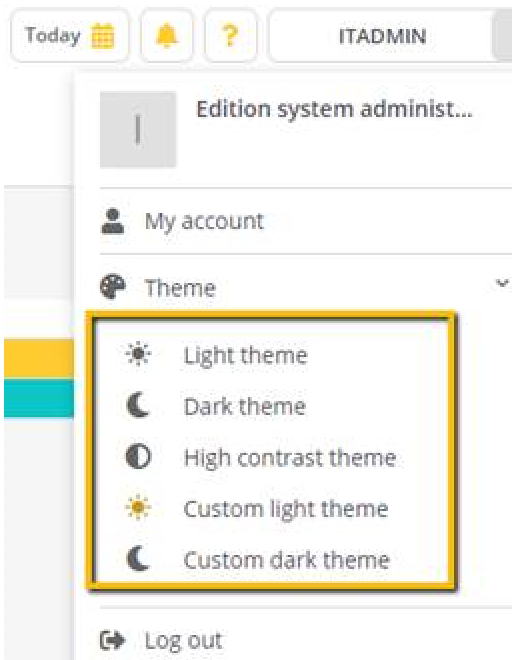
Create custom themes and branding logo.

## 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

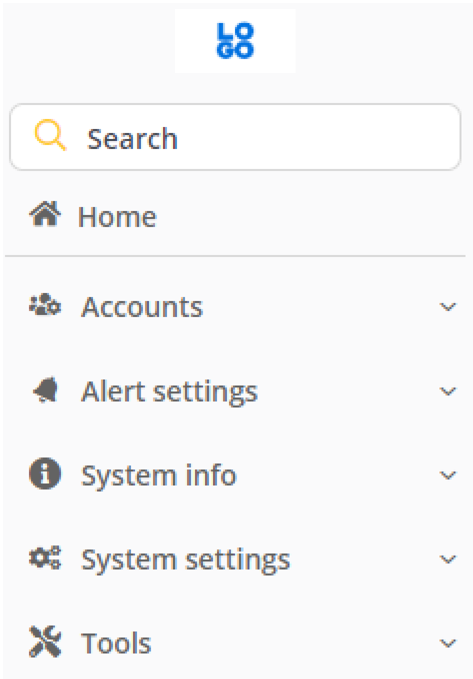
When set and active the user can choose between the following themes, meaning the original settings stay intact and available (use the non-custom theme to go back to the original theme):




## Themes logo

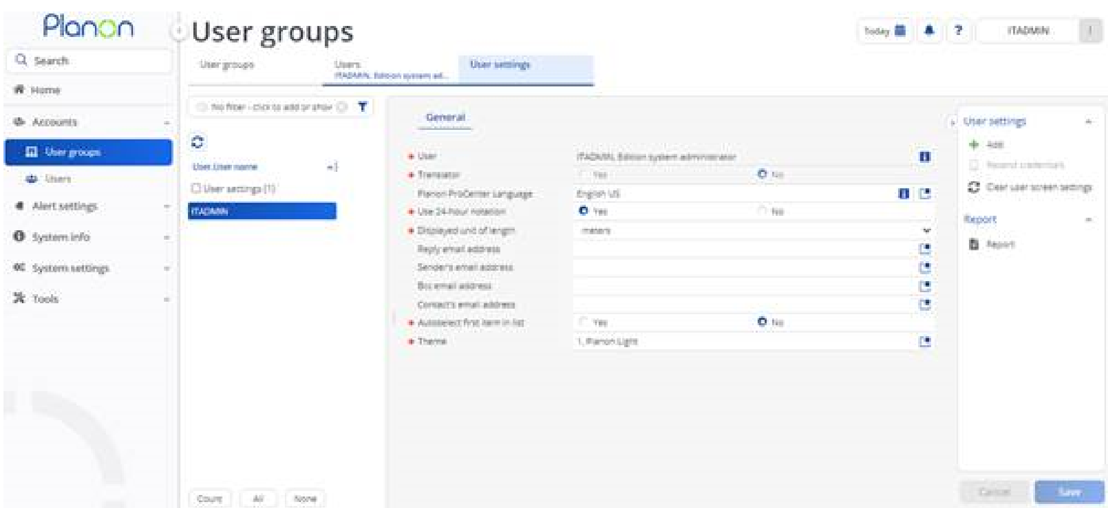
Here it is possible to upload a customer logo that is available when printing and for the different themes. It can be that different color logos are required when using a dark or light theme.

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.

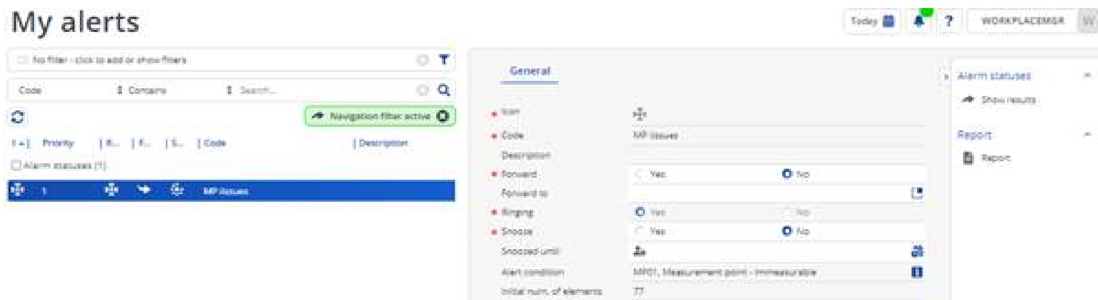



# Alerts settings

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**.




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