Essentials Edition

Version: 1.0

Property details

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About Properties and Property details

Properties are the first selection level in most of the TSIs. The basic details of the properties can be added and modified in all the TSIs. The main purpose of the Properties and Property details TSI is to enter additional details related to a property like for example, CO2 emission, Energy cost, Area surfaced etc. You can also enter parcel details and link properties to the parcels.

The properties displayed depend on the selected property set.

For details on the basic principles of using Planon ProCenter , refer to *Fundamentals*.

Properties and Property details – Concepts

This section describes the key concepts in Properties and Property details :

- Property
- Property tree
- Parcel
- Communication logs

Property

Properties are the cornerstone of Planon ProCenter . The different types of properties available are:

- Terrain
- Building
- Infrastructure
- Location
- Production facility
- Residential
- Shop
- Warehouse
- Wing
- Nature
- Use

You can add sub-properties to a property. The types of sub-properties are similar to the property types available.

Property tree

A property is a hierarchical element. This means it can be divided into sub-properties. The maximum number of levels in the hierarchical structure is three.

Example

A building complex consists of four properties: a main building, an annex, a warehouse and ground. The main building is subdivided into several wings.
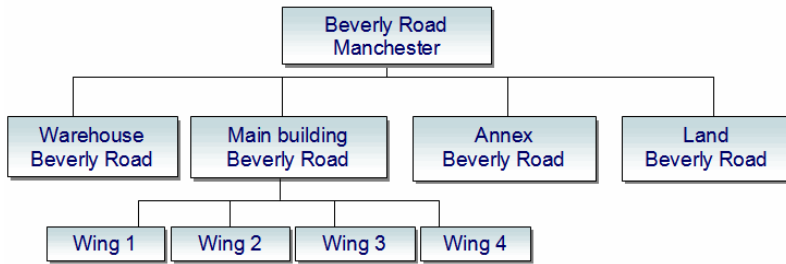
Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls etc.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements in Planon ProCenter , for example orders (all order types), properties, visitors, budgets, invoices and so on.

> 💡 You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Four eyes principle

The *four eyes principle* is a requirement that a certain business transaction must be approved by *at least* two persons. With the **Approval** feature in Planon, important changes always have to be approved by several responsible parties before the changes are actually implemented.

In Planon, the four eyes principle can be used for the following business objects:

- Contracts
- Contract lines
- Contract options
- Properties and property details

> 💡 Planon supports a workflow with two approvers or more.
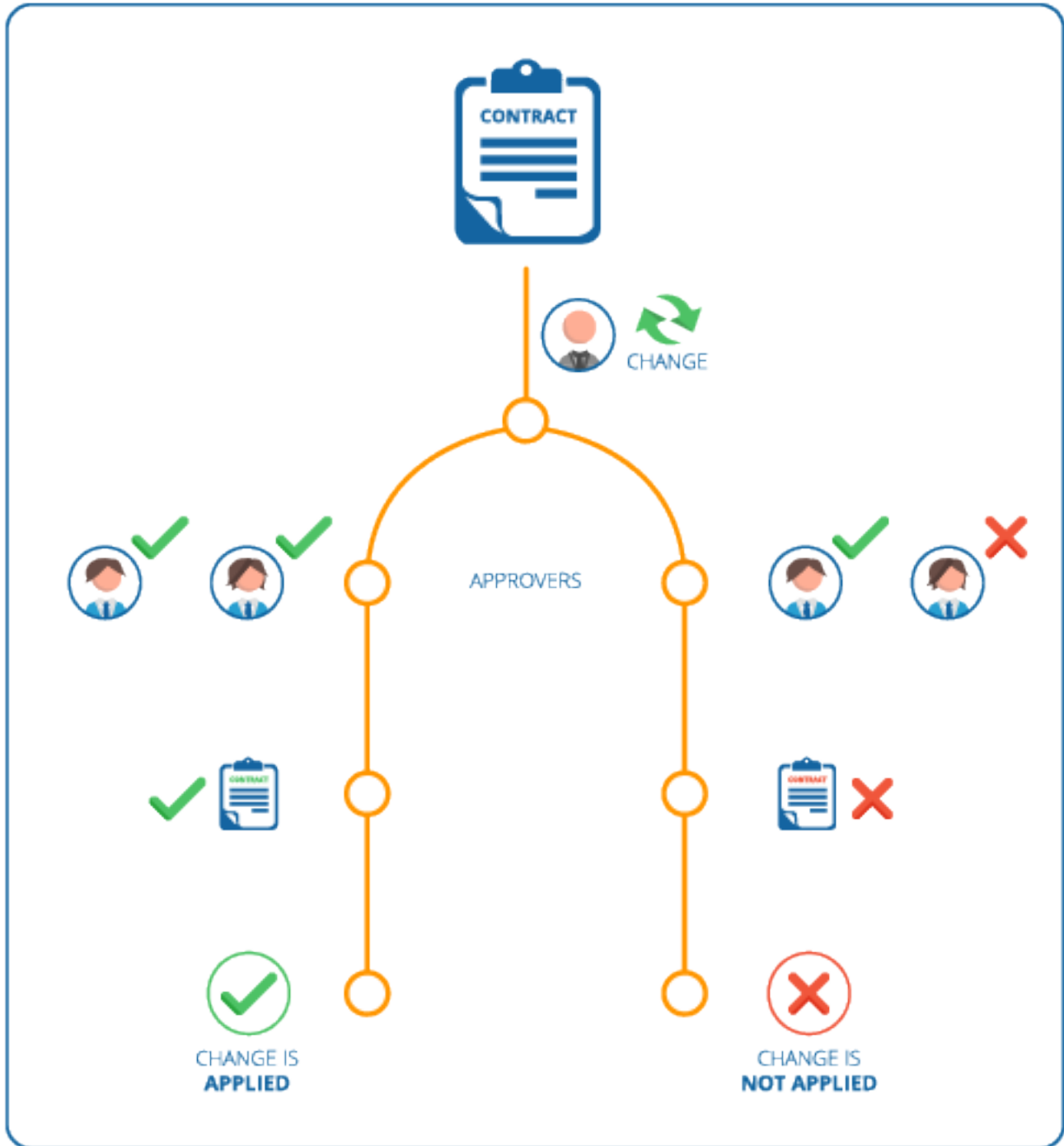
Working with Properties and Property details

This section identifies the processes and tasks that can be performed in the Properties and Property details TSI.

See the links below for more information:

- Adding a property
- Archiving properties
- Changing the parent level of a property
- Adding a parcel
- Linking properties to a parcel

Adding a property

If you have appropriate authorization, you can add a main or sub property.

Procedure

1. Go to **Properties**.
2. On the action menu, click **Add** and select the required property type. You can choose from:
    ◦ Terrain
    ◦ Building
    ◦ Non-property related data
    ◦ Site
3. In the data section, complete the relevant fields. For a description of these fields, refer to Property data.
4. Click **Save**.

You have added a new property.

> ⚠️ A property can only be deleted if it does not contain sub-properties.

Adding property details

After adding a type of property, you can add additional details to the main or sub property.

Procedure

1. Go to **Property details**.
2. On the action menu, click **Add**.

3. In the data section, complete the relevant fields. For a description of these fields, refer to Property details data.

4. Click **Save**.

You have added property details.

Keeping track of changes made to property details

You can keep track of changes made to property details fields by enabling the **History** functionality. History includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of the property details you want to keep a history on. Your application manager can enable an automatic **History** option for individual fields belonging to property details in Field definer . Once this option is enabled, any changes to the field's value are saved automatically. These changes can then be viewed on the **Property details history** selection step.

> 💡 For details on changing field attributes, see Field definer .

With the appropriate authorization, you can also manually add a history of changes to the selected property details, via the action panel. Any comments you want to make on changed data for the selected property details can be specified in the **Comment** field and subsequently saved.

Archiving properties

In Planon ProCenter , you can archive properties in all the TSIs where the properties element is available.

Procedure

1. Go to **Properties**.
2. Select the property that you want to archive.
3. On the action menu, click **Transfer to archive**.

   To archive multiple properties at once, select **Action on selection**.
4. Click **Refresh list**. The selected property is moved into the archive.
5. You have now archived a property.

   Archived properties can be viewed by clicking on the **Show archived items** button. The data can only be viewed, it cannot be modified. If you want to modify the data of an archived property, you have to retrieve the property from the archive.

> 💡 When archiving a property, the related property details are also archived.

Moving one property to another property

In Planon ProCenter you can move one property to another property if the levels of hierarchical structure of both the properties, in total, do not exceed the maximum number of levels in the hierarchical structure of the property tree. The maximum number of levels in the hierarchical structure is three.

Procedure

1. Select the property in the relevant TSI.
2. In the **General** data section, select the **Parent level** field
3. Click the reference button and select a new property from the property list.
4. Click **OK**.

> Be aware that making changes to the property hierarchy can impact other TSIs such as **Budget Management**, **Contract Management** and so on.

Using approvals

In Planon, the four eyes principle can be used for:

- Contracts (note: only for lease contracts based on lease accounting)
- Contract lines
- Contract options
- Properties
- Property details

With the **Approval** feature in Planon, important changes always have to be approved by several responsible parties before the changes are actually implemented. You can specify *which* changes require approval. Changes that require approval are only applied after they have been endorsed by *all* responsible persons. If one of the approvers rejects a change, it is *not* applied.

The application manager first has to configure the approval process before end users can work with approvals. Once the approval process has been set up, end users can work with approvals.

Configuring the approval process

Go through the following steps to configure the approval process in Planon:

1. In the **Approval definitions** TSI, at the **Approval definitions** step, create one or more approval definitions. See Creating an approval definition.
2. In the **Approval definitions** TSI, at the **Approval conditions** step, create one or more approval conditions. See Creating and linking an approval condition.
3. Link the approval condition(s) to the approval definition. See Creating and linking an approval condition.
4. Link the approval definition to the relevant business object (contract, contract line, contract option, property or property details). This is done by adding the **Approval definition** field to the business object's layout and then selecting the required approval definition in this field.

You have now set up the approval process.

Creating an approval definition

Procedure

1. Go to **Approval definitions** > **Approval definitions**.
2. On the action panel, click **Add**.
3. On the data panel, enter data in the relevant fields. For more information about these fields, see Approval definition fields.
4. Click **Save**.

You have created an approval definition. Next step is to create one or more approval conditions and link them to an approval definition. See Creating and linking an approval condition.

An approval definition has two statuses: **Inactive** and **Active**. As long as the approval definition has the **Inactive** status, Planon will *not* generate any approvals.

Creating and linking an approval condition

Procedure

1. Go to **Approval definitions** > **Approval conditions**.
2. On the action panel, click **Add**.

   The **Add approval condition** wizard opens.

3. On the first page of the wizard, select the applicable business object (contract, contract line, contract option, property, property details).
4. Click **Next**.
5. On the second page of the wizard, select the field(s) for which approval is required when making changes.
6. Click **Next**.
7. On the third page of the wizard, define a filter for each field you selected in the previous step. You can use advanced filter options (AND/OR).

   If you go one step back in the wizard, all settings concerning fields and filters will be lost. It is recommended that you first complete the wizard and make any changes afterwards. After completing the wizard you can link additional fields and actions via the **Links** action panel on the **Approval conditions** selection level. You can also change the filter options per field. For more information, see Approval condition fields.

8. Click **Next**.
9. On the fourth page of the wizard, select the action(s) for which approval is required.

   If you did not select any fields or actions in step 5 and step 9, this means that *all* actions and fields trigger an approval.

10. Click **Complete**.

    You have created an approval condition. Use the following steps to link your approval condition to an approval definition.

11. On the **Links** action panel, click **Link approval definitions**.

    The **Link approval definitions** dialog box opens.

12. In the **Available** section, select the approval definition to which you want to link the approval condition.
13. Click **OK** to close the dialog box.

> 💡 You can also create the link between an approval condition and an approval definition on the **Approval definitions** selection level. On the **Links** action panel, click **Link approval conditions** and select the approval condition you want to link.

Linking an approval definition to a property

Procedure

1. Go to **Properties/Property details**.
2. Select the property or the property details record to which you want to link an approval definition.
3. Go to the **Approval definition** field and select the required approval definition.
4. Click **Save**.

Approving changes

Some changes in properties or property details must first be approved by a group of responsible persons before they can be applied (Four eyes principle). The application manager can configure the approval process. For more information, see Configuring the approval process. Once the approval process has been set up, end users can work with approvals as follows:

1. Go to the **Properties / Property details** selection level and make the required change(s).

   For changes for which approval is required, Planon automatically creates an approval with the **In preparation** status. Approvals can be viewed and further processed in the **Approvals** TSI.

> 💡 The changes you have made are not immediately visible; they will only be implemented *after* approval. Approvals are limited to a maximum of 25 changes at a time.

2. On the action panel, click **Show approval overview**.

   An overview of your changes is now displayed. You can check the changes before sending them for approval (step 3).

3. On the action panel, click **Send for approval** to send your change(s) for approval.

> 💡 The **Send for approval** and **Cancel approval** actions can also be performed via **Action on selection**.

4. In the **Enter values** dialog box, enter relevant information the **Comments** field and click **OK**.

   The approval's status now changes from **In preparation** to **Pending**. In the **Approvals** TSI, the responsible persons can now review and approve or reject the changes submitted for approval (see steps 5, 6 and 7). The property remains blocked during the approval process, which means that users can not make any changes.

5. Go to **Approvals** and check the changes that are waiting for approval.
6. Select the required approval.
7. At **Status transitions** on the action panel, click the required status (**Approved**, **Canceled** or **Disapproved**).

> ⚠️ It is recommended to complete all approvals before upgrading Planon.

Approval statuses:

Status	Description
In preparation	In this status, you can still apply changes to the approval (up to a maximum of 10 per approval).
Pending	In this status, the property (details) is (are) blocked and you cannot make any changes to it (them).
Canceled	In this status, an approval is aborted, you must enter a comment in the **Enter values** dialog box. (Typically, this is done by the approval requestor after making a mistake).
Approved	In this status, the approval is affirmed and will be applied.
Applied	The approval is implemented.
Disapproved	In this status, an approval is rejected, the changes will not be implemented and the property (details) will be available again for new changes.
Error when applying	This status is automatically assigned if an approval cannot be applied (for example because a business object is **Under construction**). You can fix the issue that is blocking the approval (for example, set the business object that was **Under construction** back to **Completed**) and reapply the changes. If this does not work, you can set the approval to **Terminated**. You can then proceed to submit a new approval.
Terminated	The approval is closed following an **Error when applying**.

Properties and Property details - Field descriptions

Property data

Field	Description
General fields	
Property code	It depends on your Planon ProCenter settings whether a property code is generated or needs to be typed manually.
Name	Enter a relevant name for the property.
Parent level	If the property is a sub of another property, select a property that the sub belongs to.
Address data	Enter the address of the property/building. Specify all the address related fields like, Building number, Postal code, City, District and Country for the address to be complete.
Time zone	Select a time zone to which the property belongs.
Image	Select a photograph or a drawing of the property. You can upload an image or provide reference by selecting the file.
Linked parcels	If any parcels are linked to the selected property, they will be displayed here.
Display type	Select the type of property that you are adding. For example buildings, complex, land etc. Based on the type of property selected in this field, the data registered will vary.
Code	Enter a code for the property.
Property file	A link field to link a file that has not been created in Planon ProCenter such as a dossier with property data. From within Planon ProCenter , the linked file may be opened in the application in which it was created. In Web Client, when WebDAV is used, the WebDAV location will not be displayed, only the folder excluding the folder specified in file location and file name will be displayed.
Comment	A comment field in which you can type comments of any length.
Calendar	In this field, which is not visible by default, you can link a property to a company calendar, by selecting a calendar from the pick list. Consequently, all date-time fields that are related to the property will pick up the working days and working hours of this calendar.
Miscellaneous fields	
Account manager	There is a linked pick list from the Addresses TSI available for this field.

Field	Description
Cost center	Select a cost center for the property from the list.
Contractor	The contractor responsible for the construction. You can choose an option from a pick list, containing the addresses from the Addresses TSI.
Number of floors	The number of floors in a building. If you have purchased the Spaces & Workspaces TSI, it is possible to subdivide a property into floors.
Gross area	The gross area including outer walls.
Net area	The net area excluding outer walls.
Functional area	The area that is available for the actual use of the property.
Total volume	The total volume of a property.
Quantity	Specify a quantity for properties of the type **Terrain** or **Site** to register for example, the number of square meters of a lawn or the number of parking spaces.
Unit of measurement	Select a relevant unit of measurement that applies to the **Quantity** selected.
Ownership fields	
Beneficial owner	The beneficial owner uses a property. The beneficial owner and the legal owner are usually the same. You can choose an option from a pick list including the addresses of the Addresses TSI.
Legal owner	The property's legal owner is the owner according to the property register. Usually, the legal owner and the beneficial owner are identical. You can choose an option from a pick list including the addresses of the Addresses > TSI.
Acquisition contract	A link field to link to a file containing a property's acquisition contract.
Sales contract	A link field to link a file containing a property's sales contract.
Property register fields	
Municipality	The name of the municipality in which the property is located.
Section	The section to which the property belongs, according to the property register.
Cadastral numbers	The section numbers that correspond to a property.
Cadastral area	The cadastral surface area of the section.
Built on area	The number of built-on square meters/feet on the cadastral numbers.
Vacant area	The number of vacant square meters/feet on the cadastral numbers.
Ground rent	The amount of ground rent to be paid.
Zoning plan	A concise description of the zoning plan.
Easement	An indication of whether it is mandatory to grant right of way within the grounds.

Field	Description
Financial fields	
Book value	The property value, as registered in the balance sheet.
Annual depreciation	The property's annual depreciation. (Note: this data is not used for calculations. At the end of the year, Planon ProCenter makes modifications based on this field instead of the **Book value** field).
Tax value	The property's tax value as registered by the tax authorities. In other words, the amount on which the property tax is based.
Reconstruction value	The costs of rebuilding the property. The field is used when the building insurance premium is assessed.
Buildings value	The value of the building (excluding the land).
Land value	The value of the land (excluding the buildings).
Clearance costs	The costs of demolishing the property and clearing up and transporting the debris.
Valuation criteria	Any comments on the valuation data.
Valuation consultant	The consultant who created the valuation report. For these fields a pick list is available, containing the addresses of the Addresses TSI.
Report date	The date the valuation report was issued.
Valuation report	A link field to link a file containing a property's valuation report. To view the valuation report, click the **Viewer** button in the field.
Geo tags	
Longitude	Enter the longitude coordinates of the property's geographical location.
Latitude	Enter the latitude coordinates of the property's geographical location.
GPS coordinates	Enter the property's GPS coordinates, comma separated without spaces. [*latitude coordinates,longitude coordinates*]. This data is used, for example, by the Planon AppSuite app to show a job location on mobile devices of field engineers.
Audit info	
Insertion date-time	Displays the date and time the property was added in Planon.

Property details data

Field	Description
General fields	
Start date	Enter the start date for the property.
End date	Enter the end date for the property.
Code	Enter a code for the property.
Property	Select a property from the list. If you drill down from a property, this field will be filled in automatically.
Current portfolio data	
Portfolio strategy	Select the strategical status of the property. You can choose from the following options: • **Hold** • **Dispose** • **Refurbish** • **Redevelop**
Tenure	Select the conditions under which land or buildings are held or occupied. You can choose from the following options: • **Sole ownership** • **Joint ownership** • **Leased**
Business strategic value	Select the value that the property is likely to generate. You can choose from the following options: • **High** • **Low** • **Medium**
Marketability	Select weather the property is **Marketable** or **Non-marketable**.
Footprint areas	
Property footprint area	Enter the ratio of a building's total floor area to the size of the piece of land upon which it is built.
Area surfaced	Enter the part of property that is properly surfaced.
Area unsurfaced	Enter the part of property that does not have proper surface or durable upper layer.
Water expanse	Enter the extent of water on the property.

Field	Description
Rentable area	Enter the area of the property which may be leased or rented to tenants.

Approval fields

Field	Description
Code	Displays the automatically generated code of the approval.
Approval requested by	Displays the person who sent the change(s) for approval.
Comments	Displays the comments entered by the approver / the person requesting the approval.
Expected date of decision	Displays the date that is calculated based on the **Time window for approval** specified in the approval definition.
Date of decision	Displays the date on which the approval was actually **Approved**, **Canceled** or **Disapproved**.
Contract / Property	Displays the contract / property to which the change applies that requires an approval.

Approval condition fields

Field	Description
Code	Displays the automatically generated code of the approval condition.
Description	Enter a description for the approval condition.
Business object	Select the applicable business object (contract, contract line, contract option).
Condition filter	Define a condition filter for the field(s)

Approval definition fields

Field	Description
Code	Planon automatically generates a code for the approval definition. You can change this code, if required.
Description	Enter a description for the approval definition.
Approval condition	Select one or more applicable approval conditions. See Creating and linking an approval condition.

Field	Description
Status	Displays the approval definition's status. This can be either **Inactive** or **Active**.
Time window for approval	Specify the time window in which an approval must be handled.

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