



Essentials Edition

Version: 1.0

Supporting Data - General

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About Supporting data

The main purpose of the Supporting data navigation group in Essentials Edition is the registration and maintenance of various types of basic data that can be made available *to support other features* in the application. Examples of this type of data include:

- Financial years
- Priorities
- Trades
- Item groups
- Tariff groups for reservation units
- Standard orders
- Desk configurations for reservation units
- Facilities for reservation units
- Arrangements for reservation units
- VAT tariffs / Tax rates
- Etc.

Authorized users can register and maintain these sets of supporting data by selecting the relevant launch item and subsequently adding, copying, modifying or deleting elements, such as reservation tariff groups, standard orders, desk configurations, item groups, cost centers etc.



For the basic principles of working with Essentials Edition , refer to *Fundamentals*. For information on adding Services and SLAs, refer to Service Level Agreements .

Certificate types

A certificate is an additional qualification that you have acquired to show that you have specific skill or knowledge. The certificates are usually related to an occupation, technology, or industry.

Adding a certificate type

You can define certificate types and link them to a person to enable filtering personnel data for for a particular qualification that is required for a job.

Procedure

1. Go to **Certificate types**.
2. On the action panel, click **Add**.
3. In the data section, enter a **Code** and **Name** for the certificate type.
4. Click **Save**.

A new certificate type is created.

Item groups

Item groups in Supporting data is used to classify items and supplies into relevant groups. It is intended for all items/assets that can be ordered or used by FM customers. In Planon ProCenter, three main item groups can be distinguished:

- Asset groups
- Purchase groups
- Product groups

There may be great overlaps between items that have been registered as purchase items, product items and/or assets, since items which have started out as purchase items may continue their career as product items and/or assets.

Asset groups are used to classify assets used in your company. They may include furniture, office equipment or means of transport. It is for your organization to decide which items classify as assets. Assets may have started out as purchase items and/or catalog items before they were put into use.

Supporting data is only intended to group the assets. In Technical assets , you can actually register assets and assign them to specific locations and people.



For more information on this subject, refer to *Technical assets* .

Purchase groups are used to classify items which should be purchased from external suppliers before they can be ordered by FM customers. It is for your organization to decide which types of items classify as purchase items. The purchase items themselves are maintained in Supporting data > **Item groups**.

Product groups are used to register items which can be requested directly (from stock) by FM customers. Requested products need to be purchased before they can be issued. An item is referred to as a purchase item when it is purchased and as a product when it is requested by an FM customer. Usually, only the description and the tariff charged are different. It is for your organization to decide which types of items classify as purchase items and products.

Adding item groups

You can add an item group and sub item groups using the following procedure:

Procedure

1. Go to **Item groups**.
2. On the action menu, click **Add** to add a new purchase item.

In the data section, complete the relevant fields. For a description of these fields, refer to [Item group fields](#).

3. Click **Save**.

You have now added an item group.

If you want to add a sub item group, select the main item group (level 1) and select **Add sub** from the action menu. The procedure for entering and saving data is identical to adding a main item group.

Item groups can have three sublevels.

City pick list

In *Planon ProCenter*, end users can use the **City** pick list, for example, to specify the city where a property is located, or to specify the city for an address.

The **City** pick list can be maintained in Supporting data > Cities.

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.

In **Priorities**, the functional application manager or someone with similar authorizations can maintain this pick list with priorities.

Adding a priority

Proceed as follows to add a priority.

Procedure

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.

Supporting data – Field Descriptions

Item group fields

| Field | Description |
|---------------------|---|
| Classification code | Enter a classification code for the item group. |
| Name | Enter a name for the item group |
| Display type | Select a display type from the list. |
| Product group | Select Yes/No . If you select Yes , the products under this group will be available in the products list in the Products Catalog. |
| Purchase group | Select Yes/No . If you select Yes , the products under this group will be available in the purchase items list in the Products Catalog. |
| Asset group | Select Yes/No . If you select Yes , the products under this group will be assets. |

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