Essentials Edition

Version: 1.0

Supporting Data - Technical Facility Management

Table of Contents

Supporting Data - Technical Facility Management

The '**Technical Facility Management**' part of Supporting data includes the following subjects:

- Asset classification
- Priorities
- Standard orders
- Tariff groups

When you read on, you will learn more about these subjects in Essentials Edition .

Asset classifications

Asset classifications in Supporting data is used to classify corporate assets that require planned preventative maintenance: building elements and equipment.

Example

The Dutch NL-SfB system and the British CL-SfB system are two examples of quite similar, widely-used asset classification methods. Each asset classification is assigned its own code: in NL-SfB 23 stands for Floors, 27 for Roofs, 57 for Air treatment etc.

Since various classification methods are used in different counties and different lines of business, *Planon ProCenter* offers the opportunity to add several different classification methods in Supporting data , which can subsequently be applied in **Maintenance Planner**.

Adding an asset classification

Procedure

1. Go to **Asset Classification**.
2. Click **Add** on the action menu.
3. Complete the relevant fields in the data section.

   For a description of these fields, refer to Asset classification fields.

4. If relevant, enter sub-classifications.

   In total, an asset classification can have 15 levels.

5. Each time after you have finished entering the data for a classification or sub-classification, click **Save**. This asset classifications can subsequently be used in **Maintenance Planner**.

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.

Standard orders

In Planon ProCenter, 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 Work Orders , **Service Desk**, **Knowledge Base** and **Reservations**. In addition, standards orders are used in TSIs that enable automatic order generation, such as the **Service scheduler**, **Maintenance planner** or **Web Configuration** TSIs.

Planon administrators can define (add, copy, delete, modify, archive) standard orders in Supporting data > Standard Orders. Standard orders that are obsolete can be deleted.

Standard orders can have standard suborders, keywords, questions, costs, estimates, purchase order lines, requisition lines and order lines. Moreover, standard orders should always be linked to a user-defined order. The linked user-defined order determines what type of order will ensue from the standard order when it is applied by the end user. The choice of user-defined orders depends on what user-order types are used in your organization. For example: complaints, breakdowns, catering orders, cleaning orders etc.

> In contrast with regular orders, standard orders do not have status transitions of their own. However, an order that is based on a standard order will have the status transitions corresponding with the linked user-defined order. The *initial status* of an order based on a standard order is determined by the status that is selected in the **Status** field of the standard order.

Adding a standard order

Proceed as follows to add a standard order.

Procedure

1. Go to **Standard orders**.

   The elements section displays the existing standard orders.

2. On the action menu, click **Add**.

   The **User business objects** dialog box appears.

3. Select a relevant order type from the **User business objects** dialog box and click **OK**. The selected order type is linked to the new standard order. This link determines what order type the standard order will be once it is applied.

> The order types you see in the list are configurable. For more information, see Setting for the standard order business object.

4. Select an initial status for the standard order in the **User-defined status** field.
5. Complete the other relevant fields in the data section.

For more information on the available fields, refer to Standard order data fields.

6. Click **Save** to save your standard order data.

> Use the **Priority matrix** field, if you want to assign a priority matrix to a standard order. For details on this subject, refer to Priority matrices.

Adding standard suborders

Standard orders are hierarchical elements. This means you can add standard suborders to the main standard order. The below table lists which type of standard suborder can be added to which type of main standard order. Horizontally, the main standard orders are shown, vertically the standard suborders. As you can see, not all types of standard order can have suborders or can be added as a suborder to another standard order.

> This table only shows the standard system order types that are currently supported in Planon ProCenter.

Main Std. Order → / Std. suborder ↓	Std. request	Std. work order	Std. reser-vation	Std. requi-sition	Std. purc-hase order	Std. move request	Std. move order	Std. planned maint-enance order
Standard request	Yes	Yes	Yes	No	No	No	Yes	Yes
Standard work order	Yes	Yes	Yes	No	No	No	Yes	Yes
Standard reservation	No	No	Yes	No	No	No	No	No
Standard requisition	Yes	Yes	Yes	No	No	No	Yes	Yes
Standard purchase order	Yes	Yes	Yes	No	No	No	Yes	No
Standard move order	No	No	No	No	No	No	No	No
Standard planned maintenance order	No	No	No	No	No	No	No	No

Main Std. Order → Std. suborder ↓	Std. request	Std. work order	Std. reser- vation	Std. requi- sition	Std. purc- hase order	Std. move request	Std. move order	Std. planned maint- enance order
Standard move request	No	No	No	No	No	No	No	No

> To add a sub to a standard order, use the relevant **Add sub** option from the action menu.

Tariff groups - working hours

A tariff group is a detailed set of tariff amounts for working hours. If you have the appropriate authorization, you can define and maintain tariff groups for working hours in the **Tariff groups - working hours** launch item.

Tariff groups for working hours are used in the Work Orders TSI, as a charge back method for order costs. The tariff group must be linked to the internal tradesperson to whom an order is assigned. This is done in the Personnel TSI. Once an order is assigned to this internal tradesperson, the linked tariff group is used to calculate the man-hour costs of the order.

If you want to specify tariffs groups in greater detail, for example define tariffs for *overtime*, *weekends*, *bank holidays* and so on, you must define special tariffs on the **Working hours - special tariffs** selection step. For information on adding special tariffs for working hours see .

Adding a tariff group for working hours

Tariff groups for working hours are added in **Tariff groups (Working hours)**, at the **Tariff groups hours** selection level.

 Procedure

1. Select the **Tariff group hours** selection step.
2. Click **Add** on the action panel.
3. Enter a description, code (maximum of 30 characters) and date for the tariff group. See the below example for a suggestion on how to configure tariff groups.
4. In the **Hourly wage** field, select the wage that corresponds with this tariff group.
5. In the **VAT tariff** field, enter the tax rate that must be applied to the hourly wage.
6. Click **Save**.

   The tariff group is added.

7. Repeat this action for any additional tariff groups you require.

Tariff group code	Tariff group description	Hourly wage
T1	Low	45
T2	Medium high	60
T3	High	80
T4	Consultancy	100

Supporting data – Field Descriptions

Asset classification fields

Field	Description
Code	Enter the code of the asset classification. For example 27.
Description	Enter a description for the asset classification. For example Roofs.
Comment 1	If relevant, use this field to enter a comment about the asset classification.
Comment 2	If relevant, use this field to enter an additional comment about the asset classification.
Parent level	If a sub-classification is added to a main asset classification, this field automatically shows the name of the main asset classification.
Code group	Automatically displays the code of the main asset classification and all subordinate codes. Codes of different levels are separated by a dot. Example The group **Ceilings** (code 45) contains the sub-classification Ceilings; suspended (code 1). The value 45.1 is displayed in the **Code group** field of Ceilings: suspended.

Standard order data fields

Field	Description
General	
Code	In this field, enter a relevant code for the new standard order.
Order group	In this mandatory field, select the order group to which the standard order should be linked. This can be chosen from a pick list.
User-defined type	This field specifies the standard order's initial user-defined order type.
Status	In this mandatory field you must enter the standard order's *initial* status. When end users apply the standard order / request this status will be the initial status of the new order / request.
Property	In this mandatory field, select a property from the pick list to link the standard order to a property.
Reservation unit	In this field, you can select a reservation unit from the pick list to link the standard order to a department.

Field	Description
Asset	In this field, you can select an asset from the pick list to link the standard order to an asset.
Description	Enter a fitting description that is to be displayed on the new order / request when the standard order is applied. End users can modify this description as required.
Priority	You can select a priority from a pick list to specify the term within which the standard order must be carried out.
Department	In this field, you can select a department from the pick list to link the standard order to a department.
Budget	In this field, select the budget to which the order costs should be booked.
Assigned by	In this field, select the person for whom an order is completed (and who is charged for it). An option can be chosen from a pick list including all addresses of this type in the **Contracts** TSI.
Trade	In this field, you can link the standard order to a specific trade, which can be selected from a pick list.
Cost category	In this field, you can select a cost category from a pick list.
Project	In this field you can select one of the available projects from a pick list.
To be approved by	The person who must authorize the order. For this field a pick list is available, containing people from the **Personnel** TSI.
SLA service	Use this field to link an SLA service to a standard request or a standard order. This is very useful because when creating a request or order, the correct SLA service is always completed based on a standard.
SLA priority	Specify a number to search for an SLA. By specifying an SLA priority for the order, a specific SLA can be found via the SLA scope.
Weighting	Specify a number to indicate the importance of the order. Based on the weighting, the completion time score and response time score are calculated.
Display type	A display type is a specific set of data that the Planon administrator can choose to make visible for Planon ProCenter elements such as Orders, Properties, People, Contracts, Item groups and Assets. Click the button within this field to open the **Display type** pick list from which you can specify a display type for the selected user-defined business object. If the name of a user-defined business object is not displayed correctly in the **Display type** pick list, change the translation of the user-defined business object in **Field Definer**.
Standard order links	
Applicability user groups	Specify to which user groups the standard order applies. The options are: **All**, **None** or **Specific**. If you select **Specific**, you have to make the actual link to the user groups via the action menu. In Service Desk,

Field	Description
	only standard orders that are linked to the user group of the entered **Internal requestor** will be displayed.
Applicability item groups	Specify to which item groups the standard order applies. The options are: **All, None** or **Specific**. If you select **Specific**, you have to make the actual link to the item groups via the action menu. In Service Desk, only standard orders that are linked to the item group of the entered **Asset ID** will be displayed.
Applicability properties	Specify to which properties the standard order applies. The options are: **All**, **None** or **Specific**. If you select **Specific**, you have to make the actual link to the properties via the action menu. In Service Desk, only standard orders that are linked to the entered **Property** will be displayed.
Applicability space categories	Specify to which space categories the standard order applies. The options are: **All**, **None** or **Specific**. If you select **Specific**, you have to make the actual link to the space categories via the action menu. In Service Desk, only standard orders that are linked to the space category of the entered **Space** will be displayed.
User group detail	Displays all linked user groups if the **Specific** option is selected in the **Applicability user groups** field. This field will be empty, if **All** is selected in the **Applicability user groups** field.
Asset group detail	Displays all linked asset groups if the **Specific** option is selected in the **Applicability item groups** field. This field will be empty, if **All** is selected in the **Applicability item groups** field.
Property detail	Displays all linked properties in case the **Specific** option is selected in the **Applicability properties** field. This field will be empty, if **All** is selected in the **Applicability properties** field.
Space category detail	Displays all linked space categories in case the **Specific** option is selected in the **Applicability space categories** field. This field will be empty, if **All** is selected in the **Applicability space categories** field.

Tariff groups working hours - fields

Field	Description
Code	Enter a code for the tariff group for working hours (maximum of 30 characters).
Description	Enter a description for the tariff group for working hours.
Hourly wage	Enter the relevant hourly wage that applies to this tariff group.
VAT rate	Select the relevant VAT rate for this tariff group.

Index