Activity planner

Planon Software Suite

Version: L107

Planon
Building Connections

© 1997 - 2024 Planon. All rights reserved.
Planon and the Planon logo are registered trademarks of Planon Software Development B.V. or its affiliates. All other product and company names mentioned herein are trademarks or registered trademarks of their respective companies. Planon Software Development B.V., its affiliates and/or licensors own the copyright to all Planon software and its associated data files and user manuals.

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

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

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

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

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references 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.

Table of Contents

About Activity planner....6
Activity library - Concepts....8
Standard activity definition....8
Standard service plans....8
Standard planning details....9
Standard activity costs....9
Standard checklist item....10
Standard activity workers....10
Standard activity scopes for standard activity definitions....10
Activity Planner - Concepts....12
Activity definition....13
Activity label....14
Expected costs....15
Graphical planner....16
Plan....17
Planning details - scheduling method....18
Workers and Custom apps....19
Working with Activity library....20
Maintaining an activity library....20
Adding standard service plans....20
Adding standard activity definitions....20
Adding standard planning details....21
Adding standard checklist items....21
Creating scopes for standard activity definitions....22
Applying scopes for standard activity definitions....22
Working with Activity planner....24

Adding activity plans....24
Adding planning details....24
Adding planned activities....24
Adding related contract lines....25
Adding activity costs....26
Viewing cost overview periods....26
Generating clustered PPM orders....26
Generating orders for planned activities....27
Adding activity definition workers....28
Linking activity labels to standard activity definitions....28
Moving planned activities....30
Generate planned activities when creating planning detail....30
Working with graphical planner....31
Opening the graphical planner....32
Field descriptions....33
Standard activity definition fields....34
Standard planning details fields....35
Standard checklist item fields....36
Standard service plan fields....37
Standard activity scope fields....38
Plan fields....39
Planning details fields....40
Planned activities fields....41
Standard activity definition fields....42
Activity costs fields....45
Related contract lines fields....47
Index....48

About Activity planner

In **Activity planner**, you can register all activities that are necessary to maintain properties, spaces, assets, and rentable units.

The **Activity planner** TSI and its supporting **Activity library** TSI are part of a comprehensive solution to support *objective-based maintenance*. This solution focuses on asset management objectives and compliance with industry standards and legislation.

The comprehensive *Objective-based maintenance* solution supports the following processes:

- Data collection - using the **Mobile assessment survey** (MAS) and/or **Mobile observations** (MOB) apps;
- Insights into asset-related objectives: using the Assessments and observations TSI;
- Activity planning: using the **Activity library** and **Activity planner**. These new TSIs are designed to facilitate the planning of (maintenance) activities for assets, properties, spaces, and rentable units.

The following image shows the broader context of activity definitions and planned activities within Planon:

In **Activity planner** you can create activity definitions to facilitate your activity planning. You can add activity definitions manually, or have them created automatically. Planon offers various methods to do this. See Activity definitions for more information. Based on these definitions, actual activities are added to the planning. You can link schedules to the definition to automatically generate repeated occurrences of an activity. If required, you can also manually add activities to the planning. The **Activity planner** includes a graphical component on which all planned activities are shown. You can adjust the activities on the graphical planner as required.

Activity library - Concepts

The **Activity library** contains **Standard activity definitions** which can be used as templates to create **Activity definitions** for (one or more) assets, spaces, properties or rentable units (the objects to be maintained).

You can create **Standard activity definitions** to speed up the process of defining activities for specific maintainable objects.

For the sake of efficiency and clarity, you can group **Standard activity definitions** together in **Standard service plans** and **Maintenance libraries**, because you will probably have to work with dozens or even hundreds of different **Standard activity definitions**. The use of standard service plans is optional.

In the **Activity library** TSI, you can create additional standard features that can be linked to the standard activity definitions.

- Standard planning details
- Standard activity costs
- Standard checklist items
- Standard activity scopes
- Standard activity workers

When linked / applied to a standard activity definition from the library, these additional standard features are automatically added to any activity definition that is based on this standard activity definition.

Standard activity definition

Standard activity definitions are used as *templates* to create **Activity definitions**.

A **Standard activity definition** can be 'stand-alone' or included in a Standard service plan, which typically holds multiple related standard activity definitions. Both standard activity definitions and standard service plans are part of the **Activity library**.

In the **Activity planner** TSI, the **Activity definitions** that are based on **Standard activity definitions** are used to schedule (maintenance) activities and generate orders, for assets, spaces or properties.

For more information on adding a standard activity definition, see Adding standard activity definitions.

Standard service plans

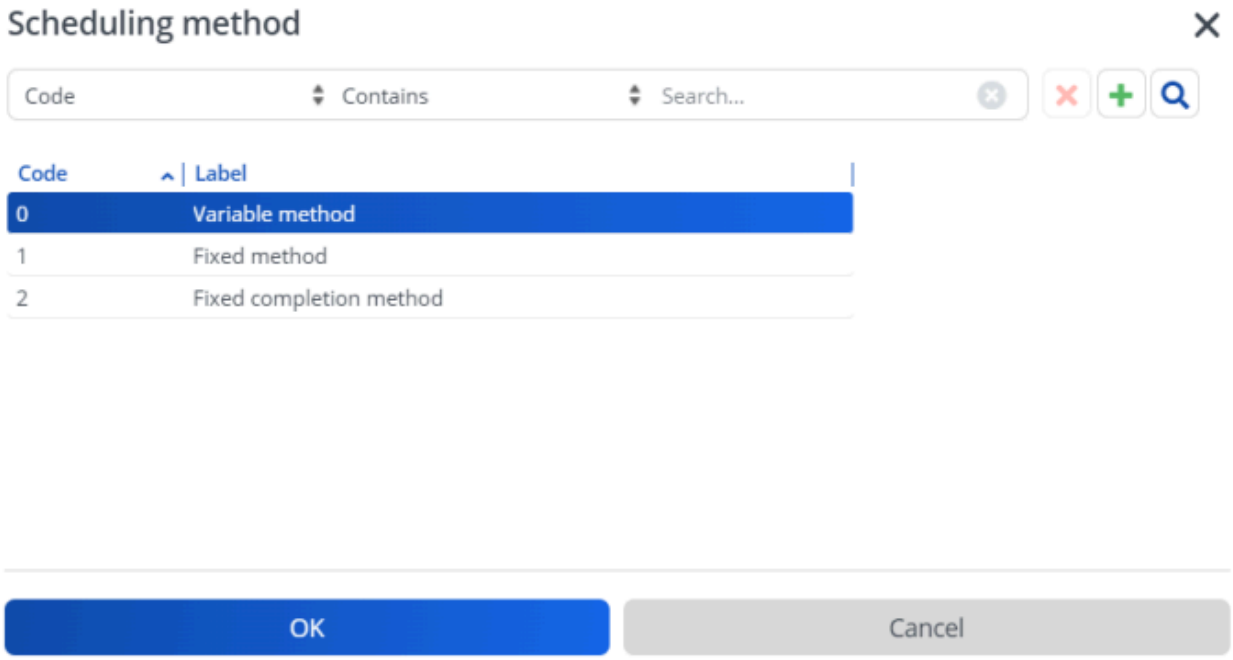
A standard service plan can be used to group together related standard activity definitions.

You can create new **Standard service plans** in the **Activity library**. The standard service plan typically contains standard activity definitions that are grouped together for a maintenance purpose.

For more information on adding a standard service plan, see Adding standard service plans.

Standard planning details

Standard planning details are scheduling templates for **Standard activity definitions**. When **Standard activity definitions** and their corresponding **Standard planning details** are applied, the defined scheduling pattern determines the number of times planned activities are scheduled and at what intervals.



For more information on adding **Standard planning details**, see Adding standard planning details.

Standard activity costs

Standard activity costs are the expected expenses that are related to **Standard activity definitions** in the Activity library. You can add three types of standard activity costs.

- General costs
- Labor hour costs
- Material costs

Standard checklist item

In the **Activity library**, you can define a standard list of items that need to be reviewed, performed or confirmed before an activity is carried out. These **Standard checklist items** can be added to a standard activity definition and ultimately to the maintenance activity on the order. You can determine the order in which standard checklist items appear in the list by entering a sequence number for each item.

Standard checklist items can for example include tasks such as inspecting equipment, verifying settings, or testing safety features. By defining standard checklist items, you can ensure that all the necessary checks are already attached when an activity definition is created.

For more information on adding **Standard checklist items**, see Adding standard checklist items.

Standard activity workers

Activity workers are a type of special tools that can be used to modify the details of an activity definition. Think of them as workers or plugins that can help move planned activities, adjust schedules, or even change costs. A **Standard activity worker** can be used as a template for creating activity workers on an activity definition.

Standard activity scopes for standard activity definitions

You can automate the creation of activity definitions in the **Activity planner** TSI, based on the characteristics of properties, spaces, assets, and / or rentable units. You can do this by defining and applying specific criteria or **scopes** for these business objects in the **Activity library** TSI. By defining scopes, you ensure efficient and effective use of your resources.

Example; when adding a new asset, maintenance managers already record various characteristics for an asset, such as its type, age, brand or location. Based on such characteristics, which are defined in a scope, you can automate the creation of the appropriate activity definitions for assets that have these characteristics in common.

Overall, the automatic creation of activities in **Activity planner** can help maintenance managers to effectively create activities for specific business objects, based on their scope (characteristics and additional criteria), ensuring that each receives the appropriate care and attention.

Standard activity scopes can be applied to the following business objects:

- **Property**
- **Space**

- **Asset**
- **Rentable unit**

You can use the *Property* scope to create activities linked to properties, the *Asset* scope to create an activity for your assets, and so on. For more information on adding scopes, see Creating scopes for standard activity definitions.

Activity Planner - Concepts

This section describes the concepts available in **Activity planner** and how they interact with each other.

Activity definition
Activity label
Expected costs
Graphical planner
Plan
Planning details - scheduling method
Workers and Custom apps

Activity definition

You can create one or more **Activity definitions** for each object that requires maintenance. In these definitions, you specify all the information that is needed to schedule and carry out (maintenance) activities. You can create activity definitions for:

- Assets
- Spaces
- Rentable units
- Properties

Activity definitions can be created in the following ways:

- Automatically, when an asset is created that is based on a **Standard asset**.
- Automatically, based on **Standard activity scopes**. (For more information, see Standard activity scopes for standard activity definitions and Creating scopes for standard activity definitions).
- Manually, by applying a **Standard activity definition** as a template.
- Manually, by creating an activity definition from scratch.
- Automatically, based on Business events and Decision rules.

When you create an activity definition, you can add **planning details**, **costs**, and **checklist items**. If applicable, you can also link a **contract line**. The activity definition remains **Inactive** at this stage. When you are satisfied with the activity definition and its configured details, you can link it to an active Plan and set its status to **Active**. At that point, you will be able to generate orders.

Activity label

An **Activity label** is a description that can be linked to one or more (standard) activity definitions. Activity labels can be used for filtering purposes.

Expected costs

Expected costs are the total costs for planned activities during a specific cost overview period. The flowing are the two types of expected costs.

- Short-term costs (monthly)
- Long-term, expected costs (annual)

Short-term costs are usually calculated monthly, while long-term costs are calculated yearly. The total costs are the sum of all expenses incurred during a specific period. The cost overview period refers to the time frame in which the costs are being analyzed and evaluated.

Note In Field definer , in the **Activity definition settings** dialog box, you can define the time period for the fields **Number of months for short-term cost overview** and **Number of years for long-term cost overview**. The maximum number of months in the short-term cost overview is *60 months* and the maximum number of years for the long-term cost overview is *50 years*. To avoid unnecessary disk space usage, only generate costs for the period you require, instead of generating costs for a longer period.

Graphical planner

The **Graphical planner** serves as a tool for organizing planned activities in a defined set of activities. In the graphical planner, planned activities can be easily adjusted by moving them around, allowing for precise planning adjustments.

Plan

Activity definitions can be grouped into **Plans**. When you have different plans, you can choose one as the default. If you use scopes or a standard definition to create new activities, the new activities will automatically be connected to the default plan.

Each plan has an *operational* period. Only activity definitions that are applicable during the operational period are allowed to be connected to the plan. The generation of orders is also limited to the operational time frame of the plan.

You can make different plans with different activities. In principle, each activity can only be part of one plan at a time. However, it is possible to include an activity in multiple plans, if there are no overlapping time periods that might cause conflicts.

Planned activities are graphically plotted on a planboard. While they are still in the **Planned** stage, you can move the activities to different dates and times.

Once the plan is balanced and is set to the **Active** status, the plan enters the **Operational** stage. That is when you generate orders and assign these to the appropriate teams or tradespeople.

Planning details - scheduling method

In the **Planning details**, you can select the *schedule* and *scheduling method* that must be applied to an activity definition when individual activities are created / updated on the planboard. The selected scheduling method determines how start dates of future activities are (re)calculated, for example when you change the start date-time of an activity or when you set its status to **Completed**.

The following scheduling methods can be selected:

- **Variable** - if you change the start date of an activity, the start and end dates of future activities scheduled for the activity definition are *not affected*.
- **Fixed** - if you change the start date of a single activity, the start dates of future activities *are changed accordingly*. So if, for example, you set its start date to two days earlier, the start dates of the following activities are also set back by two days.
- **Fixed to completion** - if you complete the activity or change the completion date of a selected activity, the start date of *the next activities changes accordingly*. For example, if you set its completion date to one month earlier, the start date of the next scheduled activity is also set back by one month.

You must first define the **Schedules** that you require. Depending on the value of the field **Activity definition exclusive**, the schedule is only valid for one activity definition, or can be reused by multiple activity definitions. See Adding planning details for more information.

Workers and Custom apps

If you intend to develop and use a **Custom app** to influence the behavior of activity definitions, you must go to the Planon App Center and register it there. For more information, see the topics on Platform apps. After registration, you can use the custom app as a **Worker** for (standard) activity definitions.

Note If you add a worker to a **Standard activity definition**, it is also added to any **Activity definitions** that are based on that **Standard activity definition**.

On the action panel, the **Start activity definition workers** action is available to execute the worker as a batch job. You can schedule this action in the **Alerts & actions** TSI to make it run automatically at configurable intervals.

Example: You can create workers for your custom app that move **Planned activities** on the graphical planner, or that change the activity definition's **Schedule** or **Costs** (apply indexation for example).

Working with Activity library

This section describes the processes and tasks that can be performed with the **Activity library**.

Maintaining an activity library

An activity library is a set of standard activity definitions that you can use as templates to quickly create new activity definitions for specific assets, spaces, properties or rentable units. A typical activity library contains hundreds of standard activity definitions. This is why you need to logically group them using **Maintenance libraries** and standard service plans, for specific purposes or locations. The use of maintenance libraries and standard service plans is optional.

Adding standard service plans

A standard service plan is a template used to group related standard activity definitions for maintenance purposes.

Procedure

1. Go to the Activity library TSI > Standard service plans selection level.
2. On the action panel, click Add.
3. Enter the required information on the data panel.

> The field **Activity service plan?** must be set to **Yes** to use this feature.

   For information on field description, see Standard service plan fields.

4. Click Save.

Adding standard activity definitions

Standard activity definitions are templates used to create activity definitions for assets, spaces or properties. They can be 'stand-alone' or included in a standard service plan, which is part of the **Activity library**. Optionally, you can also link the new standard activity definition to a maintenance library and a standard service plan.

Procedure

1. Go to the Activity library TSI > Standard activity definitions selection level.
2. On the action panel, click Add.
3. Enter the required information on the data panel.

   For field descriptions, see Standard activity definition fields.

> To ensure that the standard activity definition is applied when needed, you can link standard assets to the definition. This link is applied when an asset is created that is based on a standard asset. Appropriate activity definitions will then also be generated automatically for the asset.

4. Click Save.

> If you create an activity definition based on a standard activity definition (by applying a standard activity definition or scope, or by creating an asset based on a standard asset), any *archived* standard planning details, standard activity costs, and standard checklist items will be ignored.

Adding standard planning details

Standard planning details act as templates for defining scheduling parameters and requirements for different activities, providing a framework for establishing a standard scheduling pattern.

Procedure

1. Go to the Activity library TSI > Standard details selection level.
2. Click Standard planning details.
3. Click Add on the action panel.
4. Enter the required information on the data panel.

   For information on field descriptions, see Standard planning details fields.

5. Click Save.

Adding standard checklist items

You can create a standard checklist of items that need to be reviewed and confirmed. The checklist items linked to the activity definition are copied to the maintenance activity when generating the order. This list includes tasks such as inspecting equipment, verifying settings, or testing safety features, and can be modified as needed.

Procedure

1. Go to the Activity library TSI > Standard details selection level.
2. Select the Standard checklist items step.

3. On the action panel, click Add.
4. Enter the required information on the data panel.

   For information on field descriptions, see Standard checklist item fields.
5. Click Save.

Creating scopes for standard activity definitions

You can use standard activity scopes to automatically create activity definitions from standard activity definitions. Standard activity scopes are a set of conditions.

Procedure

1. Go to the Activity library TSI > Standard details selection level.
2. Click Standard activity scopes.
3. On the action panel, click Add.

   To select the type of scope you require, choose either **Add Asset scopes**, **Add Rentable Unit scopes**, **Add Property scopes**, or **Add Space scopes**.
4. On the data panel, enter the Code, Standard activity definition and one or more of the condition fields on the data panel.

   For information on field descriptions, see Standard activity scope fields.

To be able to save the standard activity scope record, you must enter a value in at least one of the condition fields. The condition fields are used to create a filter whose criteria are used to set the scope. For example, to set a scope for all Hitachi airco units older than 10 years, create an asset condition filter with the following criteria: Brand = Hitachi airco units and Age of asset is >120 (months).

5. Click Save.

Applying scopes for standard activity definitions

After defining the scopes for the standard activity definitions, the next step is to apply them. The system will verify the conditions you entered and generate activity definitions that match the conditions.

Generating the activity definitions is done through a background action. In the **Background actions** TSI you can follow the progress. The status of the background action indicates whether the activity definitions were generated successfully or if any errors occurred. After the activity definitions are generated, they are *inactive*. To enable order generations for the activity definition, you need to activate the activity definitions

that have been created and link them to a plan, if they are not already not linked to a plan. Generate orders after the activity definitions are *active*.

If activity definitions have been generated previously for this standard activity definition, the system will terminate any existing activity definitions that do not match the applied scope by adding an end date.

Procedure

1. Go to the Activity library TSI > Standard activity details selection level.
2. Select the standard activity definition record(s) for which you want to apply the scope.
3. On the action panel, click Apply scope or Apply all scopes.

- The scope is applied in the background. If you cannot find any activity definitions, you can check the background actions log for errors.
- **Apply all scopes** will apply all the relevant scopes in a batch process.

Working with Activity planner

This section describes the processes and tasks that can be performed with the **Activity planner**.

Adding activity plans

A **Plan** groups the activity definitions that have an operational period and it generates planned activities and orders during that time. As a rule, planned activities are generated based on **Planning details**. However, if required, you can also add them manually.

A new plan is always **Inactive**. When the plan is inactive, orders cannot be generated.

Procedure

1. Go to the Activity planner TSI > Plans selection level.
2. Click Activity plans.
3. On the action panel, click Add.
4. Enter the required information on the data panel.

   For information on field descriptions, see Plan fields.
5. Click Save.

Adding planning details

Activity definitions use planning details to define a scheduling pattern. Planning details include start and end dates, a scheduling method and a frequency.

Procedure

1. Go to the Activity planner TSI > Details selection level.
2. Click Planning details.
3. On the action panel, click Add.
4. Enter the required information on the data panel.

   For information on the field descriptions, see Planning details fields.
5. Click Save.

Adding planned activities

A planned activity is a scheduled (maintenance) task to be performed on an asset / building element / space or property. An order can be generated from each activity. Activities can also be clustered and together be assigned to a single order. 'Planned' refers to the specific dates when the activity is scheduled to be carried out, as defined in the **Planning details**. However, if required, you can also add planned activities manually.

Procedure

1. Go to the Activity planner TSI > Activity overview selection level.
2. Click Planned activities.
3. On the action panel, click Add.
4. Enter the required information on the data panel.

   For information on the field descriptions, seePlanned activities fields.
5. Click Save.

Adding related contract lines

The link between activity definition and contract line is registered in the **Related contract lines**. By linking the activity definition and contract line, you can make sure that the contract includes all the necessary activities. Linking a contract line to an activity definition, ensures that the contract line is taken over to the generated orders.

Procedure

1. Go to the Activity planner TSI > Details selection level.
2. Click Related contract lines.
3. On the action panel, click Add.
4. Enter the required information on the data panel.

   For information on field descriptions, see Related contract lines fields.
5. Click Save.

   Alternatively, you can also add or create a related contract line from the **Activity definition** selection level.

1. Go to the **Activity definition** selection level.
2. Select an activity definition from the list.
3. On the action panel, click **Add related contract lines**.

   The **Enter values** dialog box appears.
4. Enter a **Contract line**, **Start date**, and **End date** and click **OK**.

Adding activity costs

Activity costs are used to define the expected costs for a single execution of an activity. These are the system subtypes.

- General activity costs
- Labor hour activity costs
- Material activity costs

Procedure

1. Go to the Activity planner TSI > Details selection level.
2. Click Activity costs.
3. On the action panel, click Add.

Depending on the type of activity costs you require, select either Add General activity costs, Add activity costs - Labor hours, Add activity costs - Materials.

4. Enter the required information on the data panel.

   For information on field descriptions, see Activity costs fields.

5. Click Save.

Viewing cost overview periods

Cost overview periods are utilized in both short-term and long-term cost overviews. The cost overview period refers to the time frame in which the costs are generated. Cost overview periods are generated when you trigger the **Generate expected costs** button in the **Activity definitions** selection level. You can use the cost overview periods to filter the expected costs, for example; to view only **yearly** or only **monthly** expected costs.

Procedure

1. Go to the Activity planner TSI > Details selection level.
2. Click Cost overview periods.

You can view the **Code**, **Cost overview type**, **Name**, **Start date-time**, and **End date-time** of the cost overview period.

Generating clustered PPM orders

You can generate clustered PPM orders for planned activities. In order to do this, you can configure settings to cluster maintenance activities during order generation.

Procedure

1. Go to the Activity planner TSI > Activity definitions selection level.
2. Click Activity definitions and select the *activity definitions* whose activities you want to cluster into one or more maintenance orders.
3. specify the end date-time until which you want to generate maintenance orders for the selected activity definitions.
4. On the action panel, click Generate clustered orders.

   The **Generate clustered maintenance orders** dialog box appears.
5. Select the Property level criteria by which you want to cluster.
6. Select the Additional clustering criteria by which you want to cluster the activities.

> You can configure the available additional clustering criteria in the field definer.

   Each cluster formed is assigned to a single maintenance order. Depending on the selected criteria, one or more maintenance orders will be generated.
7. In the Intermediate logging field, select whether you want to activate intermediate logging during the order generation.

   By default, intermediate logging is disabled (set to **No**) to safeguard system performance. Logs are stored only after the order generation process completes. Enabling intermediate logging (set to **Yes**) for closer progress monitoring might impact system performance.
8. Click OK to start the order generation as a background action.

Generating orders for planned activities

A simplified process of generating orders for planned activities aims to improve efficiency and flexibility. By focusing on specific planning details, this method allows for the immediate initiation of work orders, ensuring scheduled tasks are executed on time.

Procedure

1. Go to the Activity planner TSI > Activity definitions selection level.
2. Click Activity definitions and select the required activity definition to which you want to generate orders.
3. On the action panel, click Generate orders.

Adding activity definition workers

Workers are applications designed to modify the Activity definition or its associated detail BO's. While some workers are provided by Planon, customers or partners can also implement them as PAAP apps. Each applicable activity definition should be linked to a corresponding worker. These workers can be executed manually or scheduled for automated execution.

Workers can be registered on the standard activity definition, automatically applying them to activity definitions based on it.

Procedure

1. Go to the Activity planner TSI > Details selection level.
2. On the action panel, click Add.
3. Select the classname of the worker that you want to use

The settings become visible. The settings are defined in JSON-format, but can also be shown as normal fields by clicking **View code**.

4. Alter the settings as desired.
5. Click Save.
6. To run the worker, click Execute activity definition worker, or schedule this action using the Alerts & Actions TSI.

Linking activity labels to standard activity definitions

By linking activity labels to standard activity definitions, you can easily sort and organize activities based on their unique attributes. This helps in enhancing data organization, search functions, decision-making, and analysis, leading to better productivity and efficiency for users handling standard activity definitions.

Procedure

1. Go to the Activity library TSI > Standard activity definitions selection level.
2. Select the standard activity definition to which you want to link an activity label.
3. On the action panel, click Link activity label.

Labels can be created in the activity planner.

The **Link activity label** dialog box appears.

4. Select the required activity label(s) from the list and move it / them to the In use section.

5. Click OK.

Moving planned activities

Activities can be moved either by dragging and dropping or using the **Move planned activities** option available on the action panel. If more than one planned activity is selected, you can move one of the activities to a specific date, and the other activities will also be moved.

You can move a planned activity if no maintenance order has been generated for it yet and it has not been derived from a planning detail with a fixed completion schedule. Additionally, the planned activity must be in a planned state, and must not be archived.

Note You cannot choose read-only planned activities. If you try to include them in a drag and drop operation, the system automatically removes them from the selection.

Generate planned activities when creating planning detail

You can generate planned activities directly when creating a planning detail, rather than waiting for a plan to be created and then linking the activities to it. That is when planning details are created, the planned activities will be generated automatically.

Procedure

1. Go to the Activity planner TSI > Activity overview selection level and click Planned activities.
2. On the action panel, click Add and fill the Activity definition and Planned date-time fields.
3. Click save.

Working with graphical planner

This section outlines the Maintenance Management processes and tasks executable within the graphical planner.

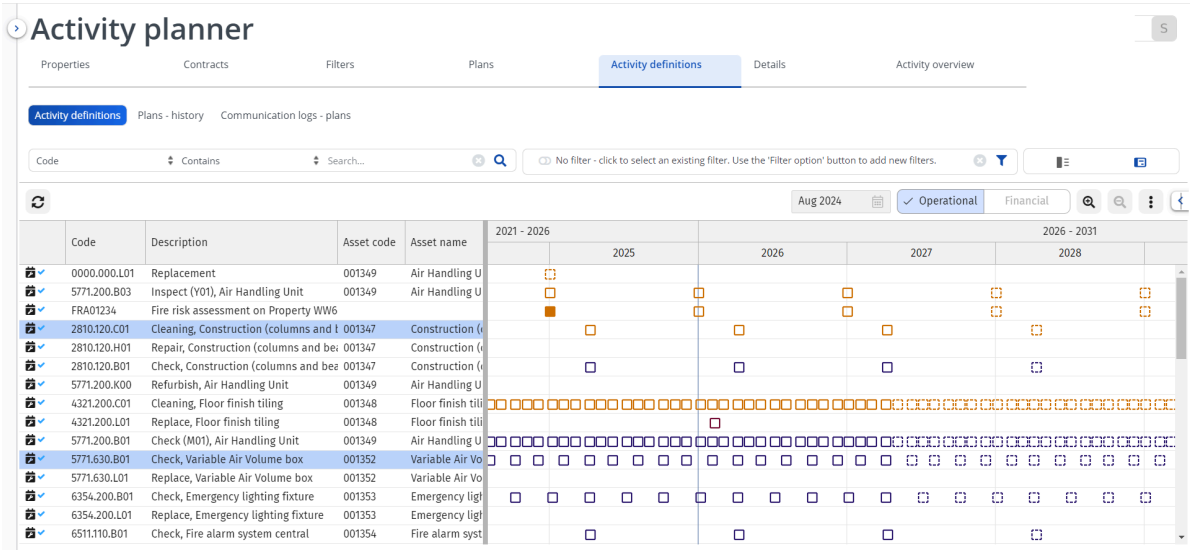
Opening the graphical planner

Opening the graphical planner

Procedure

1. Select a *compiled* activity plan and the relevant activity filters and asset filters on the foremost selection levels in Activity Planner.
2. Go to the Activity definition selection level.
3. Click the Activity planboard icon.

   The graphical planner opens, displaying all activities planned for the corresponding activity definitions.



Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Standard activity definition fields
Standard planning details fields
Standard checklist item fields
Standard service plan fields
Standard activity scope fields
Plan fields
Planning details fields
Planned activities fields
Standard activity definition fields
Activity costs fields
Related contract lines fields

Standard activity definition fields

Field	Description
Activity type	Click the **Select a value** button in this field to open the **Activity type** dialog box. Select the type of maintenance for the activities generated from the activity definition: Routine, Statutory, Other mandatory or Replacement.
Code	Enter a code for the standard activity definition.
Description	Enter a description of the standard activity definition.
Apply product requisition?	Click **Yes**, to apply the formal requisition process. If you click **No**, the informal requisition process is carried out.
Quantity	Enter a quantity for the value that you entered in the **Unit of measurement** field. For example the number of square feet of an asset that needs to be painted.
Suppress first activity?	Select the option **Yes** to set the first planned activity be generated at the start of the planning details or after the first cycle.
Unit of measurement	Click the **Select a value** button in this field to open the **Unit of measurement** dialog box in which you can select a relevant unit of measurement.

Standard planning details fields

Field	Description
Standard activity definition	Select a relevant standard activity definition for the standard planning details.
Scheduling method	Select a scheduling method (**Variable method**, **Fixed method**, or **Fixed completion method** for the standard planning details.
Schedule	Define the frequency and number of intervals at which the schedule should run. You can also select specific dates for running the schedule.

Standard checklist item fields

Field	Description
Code	Enter a code for the standard checklist item.
Description	Enter a description for the standard checklist item.
Mandatory?	Select **Yes** to make the checklist item a mandatory part of completing the order.
Comment	Enter comments to the standard checklist item, if any.
Sequence	Enter a number that reflects the order in which the checklist item must be carried out.
Standard activity definition	Select a relevant standard activity definition to which the standard checklist item must be linked.

Standard service plan fields

Field	Description
Code	Enter a code for the standard service plan.
Description	Enter a description of the standard service plan.
Activity service plan?	Select the relevant option. (**Yes** or **No**). **Note** Standard service plans with Activity service plan? set to **Yes** can be selected in standard activity definitions.
Maintenance library	Click the pick list button in this field to open the **Maintenance library** dialog box in which you can select the asset classification group.
Classification group	Click the pick list button in this field to open the **Classification group** dialog box in which you can select the asset classification group.
Technical classification	Click the pick list button in this field to open the **Technical classification** dialog box in which you can specify the technical classification.

Standard activity scope fields

Field	Description
Code	Enter a code for the standard activity scope.
Standard activity definition	Select a relevant standard activity definition for the standard activity scope.

Note At least one of the following conditions needs to be filled in to save the Standard activity scope for each scope type you select.

Activity scope - Property	
Property condition	Add a relevant property condition for the property.
Property details condition	Add a relevant property details condition for the property.
Activity scope - Rentable unit	
Property condition	Add a relevant property condition for the rentable unit.
Property details condition	Add a relevant property details condition for the rentable unit.
Rentable unit condition	Add a relevant rentable unit condition for the rentable unit.
Activity scope - Space	
Property condition	Add a relevant property condition for the space.
Property details condition	Add a relevant property details condition for the space.
Space condition	Add a relevant space condition for the space.
Space usage condition	Add a relevant space usage condition for the space.
Activity scope - Asset	
Asset condition	Add a relevant asset condition for the asset.
Property condition	Add a relevant property condition for the asset.
Property details condition	Add a relevant property details condition for the asset.
Space condition	Add a relevant space condition for the asset.
Space usage condition	Add a relevant space usage condition for the asset.

Plan fields

Field	Description
Code	Enter a code for the plan.
Description	Enter a description for the plan.
Default?	In case there are multiple plans, select **Yes** if the selected plan must be marked as the default plan.
Start date	Enter a start date for the plan.
End date	Enter an end date for the plan.
Person	Select the person who is responsible for the plan.
Comment	Enter comments for the plan, if any .

Planning details fields

Field	Description
Scheduling method	Click the **Select a value** button in this field to open the **Scheduling method** dialog box. Select a scheduling method.
Activity definition	Displays the base activity definition to which the planning details apply.
Schedule	Click the **Select a value** button in this field to open the **Schedule** dialog box. Select the scheduling type.
Standard planning details	This field is read-only and it displays the **Standard planning details** on which the Planning detail is based.
Start date-time	Enter a start date-time for the planning details.
End date-time	Enter an end date-time for the planning details.

Planned activities fields

Field	Description
Activity definition	Click the **Select a value** button in this field to open the **Activity definition** dialog box in which you can select the activity definition.
Actual completion date-time	Displays the date-time of planned activity on which it is actually completed.
Generated date-time	Displays the original date-time when the planned activity was created.
Maintenance activity	This field is read-only. If an order is created, it shows the maintenance activity to which it refers.
Overruling activity definition	If the planned activity is overruled, the reference to the overruling activity definition is displayed in this field.
Overruling planned activity	If the planned activity is overruled, the reference to the overruling planned activity is displayed in this field.
Overruling planned date-time	If the planned activity is overruled, date of the overruling planned activity is displayed in this field.
Planned date-time	Displays the date of planned activity on which it is scheduled.
Planning details	This field is read-only and it displays the planning details on which the activity is based.
System status	Displays the status of the planned activity.
Virtual?	Select the option **Yes** if the planned activity was created when a virtual activity was moved.

Standard activity definition fields

Field	Description
Code	Enter a code for the activity definition.
Description	Enter a description of the activity definition.
Start date	Enter a start date for the activity definition.
End date	Enter an end date for the activity definition.
Comments	Enter relevant comments, if any.
Maintenance objects	
Property	Displays the property where the asset, for which the activity definition is created, is located. When the asset is moved to a different property on compiling the plan / generating the PPM order, the maintenance activity definitions of this asset are updated with the new property.
Space	Select a relevant space.
Asset	Select a relevant asset.
Rentable unit	Select a relevant rentable unit.
Location assignment	Select a relevant location of the asset. When filling in the asset, the base location assignment will be automatically filled in for single assets.
Details	
Standard activity definition	Select a relevant standard activity definition.
Service agreement service	If relevant, select a service that belongs to a service agreement (Service Providers solution) and apply it to the activity definition.
Standard Service plan	Select a relevant standard service plan. **Note** Only Standard service plans with **Activity service plan?** set to **Yes** can be selected.
Quality level	Select a relevant quality level for the maintenance of the selected asset / building element, in this field.
Quantity	Specify the required number.
Unit of measurement	Select an unit of measurement, that is the dimension required.

Field	Description
Overruled by	If you linked several activity definitions to the same asset, which include equivalent work (activities), but which have a different schedule, it is possible to let the activities of the selected activity definition be overruled (for a specific period) by activities of another activity definition. You can select an overruling activity definition in this field.
Period of overruling schedule	Specify a period of time to be deducted from the start date-time and added to the end date-time of the selected activity definition, to define a period within which the overruling activity definition is valid.
Activity definition group	Select the relevant activity definition group used for clustering.
Activity type	Enter the type of activity that applies to the activities generated from an activity definition.
Assessment definition	Select a relevant assessment definition in this field.
Asset classification	Select an asset classification.
Comments	Enter relevant comments, if any.
Order generation	
Standard order	Select a relevant standard maintenance order. This field must be completed to generate orders.
Order group	Select an order group. This field must be completed to generate orders.
Trade	If relevant, select a trade. The selected trade is applied when generating orders.
Clustering allowed?	Select the relevant option whether or not the activities that are generated from this activity definition can be clustered or not.
Maintenance library	Select the relevant maintenance library from the list.
Apply product requisition process?	Click **Yes** in the **Apply product requisition process** field, if you want to apply the formal process. When adding material costs, select the product that you require. The actual costs involved are automatically added to the maintenance order.
Budget definition	Select a budget definition. The budget definitions specified in **Supporting data** are displayed.

Field	Description
Suppress first activity	The decision on whether to generate the first planned activity should be made either at the outset of the planning details or after completing the initial cycle.

Activity costs fields

Field	Description
Cost type	Select a cost type from the dialog box available in this field. There are two types of costs: **Fixed** costs and **Variable** costs.
Description	Enter a relevant description for the activity cost.
Required quantity	Enter the required quantity needed to complete the activity on one asset.
Activity definition	Click the **Select a value** button in this field to open the **Activity definition** dialog box. Select the relevant activity definition.
Price per unit	Enter the price per unit. When a purchase item is entered, this field will be automatically populated based on the purchase item. For general expenses, you can manually fill in this field. (Hourly wage applies to labor hours.)
Unit	Enter the number of units required.
Standard cost category	Select a standard cost category from the dialog box available in this field. A standard cost category is a classification of the costs according to function.
Standard cost type	Select a standard cost type from the dialog box available in this field. A standard cost type is a classification of the costs according to type.
VAT tariff (tax)	Select a VAT (tax) rate from the dialog box available in this field.
Index %	Enter a value for the indexation percentage that you want to use in the next indexation of the activity cost to enable the **Index activity costs** action. When using this action, a new activity cost business object is created by applying the index percentage to the selected activity cost. The selected activity cost will be ended.
Long term index %	Enter a value for indexation percentage that you want to use in long term cost overview to predict upcoming indexation for activity costs that are not indexed yet.

Note Activity costs with an empty end date are valid forever. When calculating expected costs for future years, the long term index

Field	Description
	is used to predict costs increases in the upcoming years for activity costs with an empty end date.
Activity costs - Labor hours	
Tariff Group	If you are adding labor hour costs, select the tariff group that applies to the hourly wage, from the dialog box available in this field
Hourly wage	If you are adding labor hour costs, enter the relevant hourly wage in this field.
Required quantity	Enter the quantity referring to the purchase item or number of labor hours needed to complete the activity on one asset.
Activity costs - Materials	
Product	Select a product to add its material costs. The product related fields on the material costs are automatically updated. **Note** This field can be filled in only when **Apply product requisition** is set to **Yes**.
Purchase item	If you are adding material costs, select the product that you want to order from the dialog box available in this field. **Note** This field can be filled in only when **Apply product requisition** is set to **No**.
Use actual price	When set to **Yes**, the actual price from the product / Purchase item is used when generating orders, instead of the Price per unit in the business objective **Cost**.
Required quantity	Enter the quantity referring to the purchase item or number of material hours needed to complete the activity on one asset.
Unit of required quantity	Enter the number of units required.
Discount/Surcharge	Enter the discount rate or surcharge.
Material type	Material to use. Materials can be defined in the Material Types TSI
Purchase item group	Purchase item group is automatically filled in based on the Purchase item.

Related contract lines fields

Field	Description
Activity definition	Click the pick list button in this field to open the **Activity definition** dialog box in which you can select the relevant activity definition.
Contract line	Click the pick list button in this field to open the **Contract line** dialog box in which you can select the relevant contract line.
Start date	Enter a start date for the related contract line.
End date	Enter an end date for the related contract line.
Customer	Click the pick list button in this field to open the **Customer** dialog box in which you can select the relevant customer

Index

A

Activity definition 13
  fields 42
Activity definition worker 19
  add 28
Activity label
  link to activity definition 14
  link to standard activity definition 14
  Link to standard activity definition 28
Activity library 8, 8, 10
Activity planner 6
Activity planner: overview of concepts 12
Activity plans
  Add 24
Adding activity costs 26
Adding linked contract lines 25
Adding planned activities 24
Adding planning details 24

C

Cost overview periods 26
create activity library 10, 20
Custom app
  Planon App Center 19

E

Expected costs 15

F

Field descriptions 33

G

Generate orders
  clustered PPM orders 26
  generate orders 26
  planned activities 27
  planning details 27
Generate planned activities
  planning details 30
graphical planner
  Overview 31
Graphical planner
  Activityplanner 16
  open 32

L

Long-term cost overviews 26

M

Mark a plan as default plan 17

P

Plan
  fields 39
Planned activities
  fields 41
  move activities 30
Planning details
  fields 40
  scheduling method
    fixed 18
    fixed completion 18
    variable 18

R

Related contract line
  fields 47

S

Scope
  Standard activity definition 10
Short-term / Long-term expected costs 15
Short-term cost overviews 26
Standard activity costs
  Activity library 9
  fields 45
standard activity definition 8
Standard activity definition
  fields 34
Standard activity definitions
  Activity completion status 22
  Add 20
  Add scopes 22
  Apply scopes 22
  Follow-up actions 22
  Scopes 22
Standard activity scope
  fields 38
standard activity workers 10

Standard check list items
Add 21
Standard checklist items
Activity library 10
fields 36
Standard planning details
Activity library 9
Add 21
fields 35
Standard service plan
fields 37
Standard service plans
Activity library 8
Add 20

T

Total costs 15