



Application Management - An overview

Planon Software Suite

Version: L105

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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.

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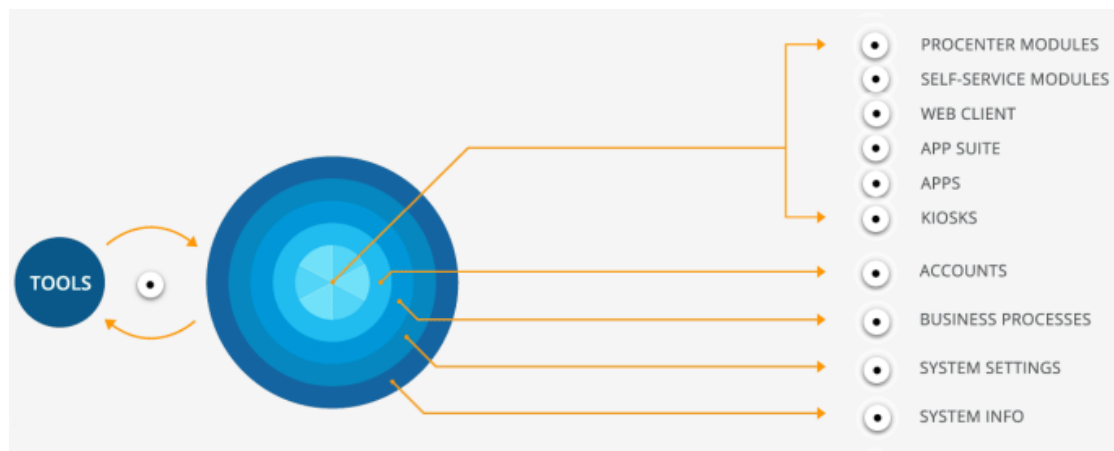
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Application management overview

Planon application is delivered as a preconfigured system with predefined processes. To adapt the configuration to the organization's requirements, it is possible to make changes in the application.

The **Application management** components and the tools involved in data and configuration transfer to handle these components are explained in the following topics.

This image shows an overview of these **components** and **tools** used by an application manager.



The circles of configuration illustrate the routing and impact of modifications in the Planon application.

Example: The configuration of **Business processes** affects **Accounts** and this, in turn, affects user interfaces. However, a change in one user interface does not necessarily affect another user interface.

Concepts of Application Management

Business object

Data is stored as logical units called as business object (BO). Business objects are customizable to create user-defined business object (UDBO) and are managed in Field definer .

Layouts

A business object or a user-defined business object (UDBO) can have one or more layouts. A layout helps to define how screen elements such as fields, tabs and action statuses must be displayed. A Planon-provided layout for a BO is called a *base layout*. It determines which fields are available for users when a filter is selected. Layouts are managed in Layouts .

TSI

A TSI (task-specific interface) includes selection levels and steps with several (predefined) business objects. It offers various user groups the required functionalities to perform specific tasks and actions. A selection level displays the elements list of a BO and includes multiple layouts that determine how a BO or UDBO is presented to the end user. TSIs are available for end users in the *Navigation panel*.

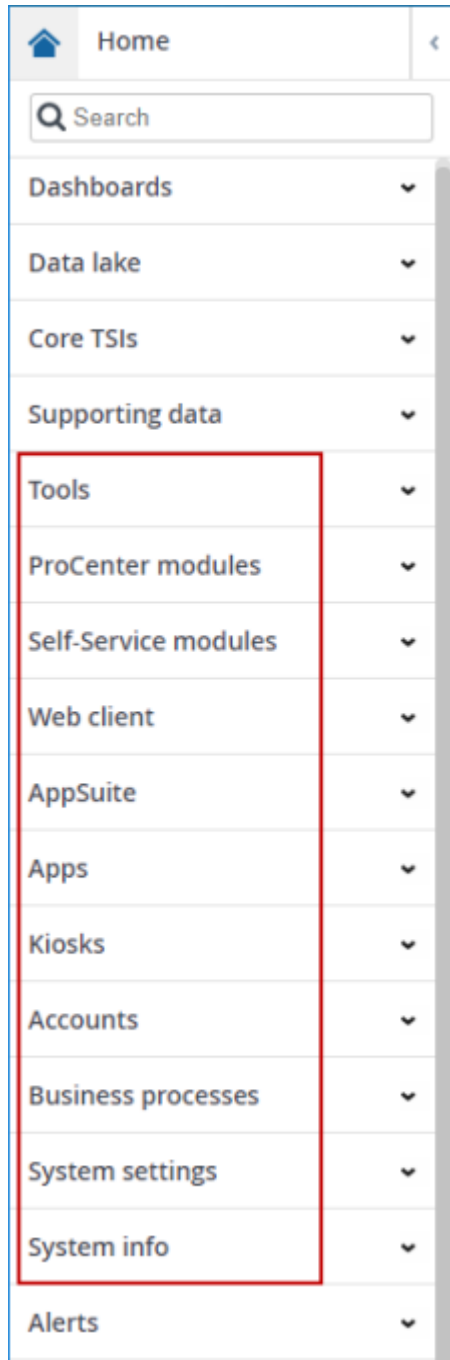


For more information about the user interface components of the Planon application, see [Fundamentals > Overview](#).

Configuration and settings

As an application manager, you are responsible for optimizing your business processes using the Planon application.

In order to do this, you need to know where to start and use the functionality for configuring the application.



The Planon application's navigation panel is laid out in such a way as to combine the relevant functionalities. The selected entries contain the TSIs relevant for application management.

ProCenter modules

In the **ProCenter modules** navigation group, you can make settings related to the Planon ProCenter user interface:

- You can create/maintain [Layouts](#) and [TSIs](#).
- You can create selection-step filters using [TSI filters](#) and create [ProCenter filters](#) specific to the Web client.
- By using the [Graphical CI/Asset Viewer settings](#), you can assign colors to CIs/assets relation types in the Graphical viewer. Similarly, the [Reservation planboard colors](#) TSI enables you to assign a default color or different colors to the reservation bars displayed on Reservations > Graphical planner TSI.
- The [Resource Planner Configurations](#) allows you to define one or more planboard configuration. For example, you can create a separate configuration for each team, or link multiple teams to planboards that are based on practical criteria, such as region or work order group.
- Using [Web configuration](#), you can configure web forms. You can add/edit web definitions, sites and CSS styling to pages. It allows you to link user groups to pages, navigation panel groups to pages and web definitions to a site.

Self-Service modules

Planon Self-Service enables you to retrieve data from Planon or submit request to Planon using web forms (based on web definitions). **Self-Service modules** allow you to create and configure these web forms extensively (look and feel, fields, tabs, "behavior",).

In the **Self-Service modules** navigation group, you can configure

- Accounts
- Visitors
- Forms
- A reservation wizard for creating reservations
- Orders (including workflows for these orders)
- CAD viewer where you can enable end users to view floor or space drawings in a form and configure how a CAD drawing should be displayed in the modules linked to it
- Knowledge Base
- Product store definitions
- Move requests
- Publisher charts and KPI charts
- Request lists
- Performance score charts
- Selectors

- Service requests
- Service forms using Services

These *modules* result in web forms that you can see in your home page.



For more information about Self-Service modules, see [Web configuration](#).

Web Client

In the **Web client** navigation group, you can configure these.

- [Navigation panel](#)
- [Homepage](#)
- [Alerts settings](#) (where you can configure the **Alarm** button and select which **My Alerts** selection step must be navigated to when clicking the button)
- [Web client](#) TSI (where you can specify the URL for a Web client and configure which homepage it must display)

AppSuite

In the **AppSuite** navigation group, settings related to Planon AppSuite and PMFS used by maintenance engineers are handled. It is mainly designed for Field services and holds several app modules.

You can perform general AppSuite settings, such as adding a custom logo and BIM models. You can configure AppSuite related asset settings, property settings, Mobile field services settings, PMFS action configuration and PMFS system settings.

For more information, see [Planon AppSuite](#).

Apps

You can configure the Planon App and turn on/off use cases. Using **Mobile actions**, you can configure actions for users to report an incident directly on Assets, Spaces and User groups. You can create various themes in **Theming**.

You can configure different settings related to the Planon app, such as selecting a theme, image settings, configure settings for reservations related settings, spaces and assets in the **Button settings**.

For more information, see [Planon Apps](#).

Kiosks

Kiosk and **Room booking panel** work in sync with the **Reservations** TSI. Any changes made to a reservation are automatically reflected in the **Reservations** TSI and on the Kiosk/Room booking panel. You can configure Kiosk and Room booking panel definitions. You can enable users to add, edit, delete or view reservations via the Kiosk or Room booking panel.

For more information, see [Kiosk](#).

Accounts

In the **Accounts** navigation group, you can configure user and authorization related settings of the Planon application.

- [Authorization](#) to authorize user groups and business objects
- [Function profiles](#) to specify the functionality to be made available to certain users
- [User account](#), where you can edit basic user account details such as personal data and modify account related settings
- [User groups](#)
- [Authorization filters](#)
- [Authorization links](#)

For more information, see [Authorization](#).

Business Processes

Business processes navigation group includes actions that mainly handle system level application management and affects all user interfaces.

- You can notify users about specific events using [Alerts](#).
- In [Approved messages](#), you can control the appearances of warnings and confirmation messages commonly displayed in Planon. You can create:
 - [Condition filters](#)
 - [Configuration labels](#)
 - [Questionnaires](#)
 - [Standard orders](#).
- In [Field definer](#), you can manage settings of BOs, fields, display types, actions, links, statuses and status transitions.

- In **SX configuration**, you can register new (solution or task) user extensions and link it to a business object using Field definer.
- In **Workflows**, you can view the complete status flow and possible status transitions of elements such as Reservations, Orders, Visitors and more.
- In **Attributes**, you can configure various customer assets as items in Planon: from automobiles to chairs, from air conditioning units to window frames.
- In **Action-reason configuration**, you can configure actions and reasons that can be displayed on the layout of any relevant communication log.
- Using **Apps**, you can install, upgrade apps and configure the Planon application as required.

Creating a product versions overview

For a Planon application manager it can be useful to view information about the versions/ hotfix of Planon that have been installed in their environment.

By checking the **Product versions overview** and the [online release notes](#), the application manager can determine whether a reported problem was caused by using an earlier version of the software that did not yet have a solution for the issue.

Procedure

1. Go to Self-Service modules > Publisher.
2. Add a Publisher list, select BO Product versions.
3. Enter a Code and a Description and click Save.

Optional: add a Translation, this translated name will appear in the elements list, next to the code.

4. Go to List block in the item list of your list page and add the fields you want to display.

For example, Build ID, Start- and End date and Product hotfix number.

5. Click Save and go back to your main Publisher list and try out the URL.

Initially, you will see an empty list with a Search button. Click Search, a list with product versions appear.

Build ID	Start date-time	End date-time	Product hotfix number	Status
44.0.0.0-119	28/03/2019 10:57	28/03/2019 11:16	0	P
45.0.0.0-133	26/04/2019 19:20	26/04/2019 19:48	0	P
46.0.0.0-118	29/05/2019 12:43	29/05/2019 13:02	0	P
47.0.0.0-135	27/06/2019 18:25	27/06/2019 18:48	0	P
48.0.0.2-1	05/08/2019 19:31	05/08/2019 19:49	2	P

System Settings

The **System settings** navigation group allows you to make application-related settings that affect the entire Planon application.

- In [General](#), you can apply general settings to fields, such as the date format, Help URL, default calendar, address formatting, database time zone and more.
- You can manage:
 - [Licenses](#)
 - [Property sets](#)
 - Setting related to **Outgoing email**
 - **Security**
- In [Reporting](#), you can apply reporting related settings. You can enable and specify CSV escape characters, HTML encoding, the warning limit on report performance and apply UTF-8 for a mail merge.
- In [Web application](#), you can specify settings for the Planon ProCenter Web client. You can configure Session time-out and Log off URL to redirect after logging off from Planon.
- In [Connect for Calendars](#), you can configure Microsoft Exchange clients for inviting resources and attendees.
- In [File locations](#), you can specify the locations for various file types.
- In [Languages](#), you can change the user interface language of the application.
- In [Improved features](#), you can enable new functionality in the Planon application that is not compatible with the previous implementation.
- In [External data storage](#), you can configure Amazon S3 buckets (AWS). Using the **Scheduled tasks** TSI, you can activate/deactivate available **Scheduled tasks** and add scheduled **Task user extensions**.
- In [Trusted services](#), you can register services that are 'trusted'. A list of Trusted services currently being used in Planon will be displayed in this TSI. You can manage the existing services and add a new one as well.



Some services are required to make use of the Planon Software Suite business interface, executing business logic on behalf of a particular user. In order for the code to function as intended (i.e. with the proper authorization) such services must be able to log on acting as that particular user. Since these services will be unaware of the user's password, obviously for the sake of security, another means of authentication is required.

- In [Data lake](#), you can specify data lake settings, export data to the data lake and also delete data from the data lake.
- In [Themes](#), you can configure themes related settings like activating/deactivating the custom theme, setting the primary and secondary colors of the custom theme and set themes logo.

For more information, see [System settings](#).

System Info

The **System Info** navigation group holds all the information about Planon predominantly applicable to application managers.

- You can create **Emails** used across the application.
- View details related to
 - [Bundles](#).
 - [Hit count data](#)
 - [User sessions](#).
- In **Exchange appointments**, you can push appointments to Exchange when synchronizing Planon with Exchange and to pull & process appointments from Exchange while synchronizing Exchange with Planon.
- In [Log viewer](#), you can view information, warning or errors of events in the Planon application and system feedbacks that may occur, for example, importing a language file.
- Service desk user can save service requests as drafts if they need more time to enter data. These drafts can be viewed in [Service desk drafts](#).
- [Background actions](#) displays time-consuming actions, such as deep copying, generating clustered orders, running an Enterprise Talk/SDI definition and others tasks that run on the application server while you continue to work.
- In [Performance monitoring](#), you can monitor data that is derived from the performance logging of your Planon ProCenter system. You can activate/deactivate monitoring, set intervals and frequency of monitoring.

Application management tools

Application management involves tools for data transfer, configuration transfer and interface management. This section describes the data and configuration transfer tools.

Data transfer tools

Customers require data import/export facilities for elaborated connectivity or business intelligence purposes. The Planon application features a number of ETL-related tools, such as:

- [Enterprise Talk](#), which is used to import data from another data source into Planon and export data from Planon to an XML or CSV. By using **Enterprise Talk**, you can maintain the Planon data structure and import the configured set (from *Acceptance* to *Production*).
- [SDI configuration](#), which you can specifically use to process data only for onboarding purposes.
- [Data Onboarding](#) that can be used to collect and import data into Planon easily (without requiring any knowledge of XML or specific Planon configuration skills).

Configuration transfer tools

The Planon application features two tools that enable you to import/export configuration packages. These two tools work similarly, but differently:

- **Configuration Transfer**
[Configuration Transfer](#) TSI is used to import/export the Planon configuration components from one environment to another (from Acceptance to Production). It enables Export, Import and preview of a configuration via a wizard.
- **Configuration labels**
Works differently from **Configuration transfer** in the sense that it allows you to identify and export only those items that are affected by configuration. During customization, [Configuration labels](#) tracks and labels these items and you can then uniquely identify and import/export them across a DTA(P) street.

Web services

Planon ProCenter offers web services support ([SOAP](#) and [REST](#)). You can integrate Planon ProCenter into your common business processes allowing other enterprise applications to interface and use data from Planon ProCenter .

In Web services you can :

- create a web service
- add a web service definition
- link business object definitions to a web service definition
- generate, comply and deploy a web service
- develop a web service client



Please note that SOAP web services will be replaced by REST. For more information, see [Pending Improved Features](#).

System accounts

A system account is a special kind of account that is used by the Planon application internally to perform specific actions.

Actions in the Planon application are always performed by an account. For reasons of security and compliance, the *user* performing such an action needs to be known by the application.



System accounts:

- Are not linked to an actual person
- Are meant to be used for internal processes only
- Must not be deleted.

The following table lists the system accounts in the Planon application:

System account	Description	Used by
AWMDataEngineAdmin	Used to perform all the AWM processes, initialized by the AWM data engine. For example: polling the sensing system .	Agile Workplace Management
CloudAdmin	Used to configure the environment based on (cockpit) input. For example: Creating a property set in the Cloud .	Environment Management gadget
EventConnectorAdmin	Used to trigger events creating and processing outbound messages. For example: using the pull mechanism to create outbound messages .	Event Connector
ExchangeAdmin	Used in synchronizing Exchange appointments .	Connect for Outlook Connect for Calendars

System account	Description	Used by
SchedulerEngineAdmin	Used by the scheduler client to retrieve and run the system jobs.	Alerts Connect for Outlook
SysDataLake	Used for synchronization between the Planon application and the Data lake.	Connect for Analytics

Security assessments

Planon has set up a procedure for customers to conduct security testing.

Planon Universe Customer policy for testing

Planon embraces customers who would like to carry out penetration, vulnerability, performance, and/or load tests against their Planon Universe application. This will not only create transparency about our security, but could also improve our product.

Requesting Planon's annual security assessment

By default, Planon carries out annual security assessments which are performed by a third party. The 'Executive reports' and the 'Planon in response to the report letter' of these security assessments can be downloaded via the [Customer portal Security Assessment page](#).

Requesting your own security assessment Planon Cloud

Planon embraces customers who want to carry out their own security testing. But for Cloud customers, before a security assessment may be performed, an official approval from Planon is needed along with the acceptance of the Terms and Conditions. The request form can be found on the [Customer portal Security Assessment page](#).

Requesting your own on-premise security assessment

Since on-premise customers are running Planon on their own infrastructure, they do not need a prior approval from Planon to conduct the security assessment. However, the following Terms & Conditions are applicable to security assessments of on-premise installations of Planon Universe.

Terms and Conditions on-premise security assessments

- Planon will only evaluate penetration/vulnerability reports performed on a release no older than 1 quarter year.
- Vulnerabilities found in older versions than the latest Planon universe release are not resolved separately, they must be resolved by performing an update.
- Penetration/vulnerability testing should be performed in a non-production environment. This is to avoid negative consequences on the continuity, integrity, and availability of the application that may arise during testing.
- If the tested environment is older than 1 quarter year, a non-production environment needs to be upgraded and a re-test has to be performed. The differences in re-test will be reviewed by Planon after receiving the full penetration/vulnerability report.
- The customer will provide Planon with a complete copy of the report to improve its product if possible or necessary. The report needs to be added to the original ticket which is created in support of this test and is visible on the Customer portal.

- Additional costs will be charged for valuating penetration/vulnerability reports which are performed on environments older than 1 quarter of a year.



Planon only resolves vulnerabilities in future Live releases.

- Individual findings reported via other tickets will not be treated as part of the provided report.
- On-premise environments must be hardened before a test is performed as described in .
- Any discoveries of vulnerabilities or other issues related to the penetration/vulnerability test are not allowed to make public or made available to others than Planon or the Company.
- The customer is obligated to report 'critical' application security vulnerabilities directly to Planon as soon as possible via mail at security@planonsoftware.com.
- Your performance of the testing and the results will be considered as confidential information.
- Any discoveries of vulnerabilities or other issues related to the penetration test are not allowed to make public or made available to others (for example, CVE registration).
- As a customer, you are entitled to hire an external testing party who will perform the testing on your behalf. Planon is in contract with you as a customer and will not sign any contract, statement, and/or other binding agreement with these parties.

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