



Connect for AutoCAD

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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About Connect for AutoCAD

Connect for AutoCAD is a plug-in that is integrated into AutoCAD and enables AutoCAD users to maintain Planon ProCenter data in their CAD drawings.

Connect for AutoCAD is a part of Planon CAD Workbench Solution which also contains CAD Import. CAD Import is available as a launch group within Planon ProCenter and enables users to import the (changed) data from Connect for AutoCAD.

Prerequisites for Connect for AutoCAD

- Connect for AutoCAD must be installed.



See *Connect for AutoCAD - Installation Guide*.

To run the registered, installed version of Connect for AutoCAD, the following requirements must be met:

- Users must have Planon ProCenter logon credentials. Users will be prompted to log on to Planon ProCenter while using certain features in the plug-in.
- CAD Workbench is required to be able to work with Connect for AutoCAD.
- Drawings must be imported at least once by CAD Import in Planon ProCenter.
- The **Connect for AutoCAD** tool needs the **JsonServices** product definition to function properly. Without it, an error message will be displayed that the URL is invalid. You can link the **JsonServices** product definition to a user in Authorization > User Groups.

Running Connect for AutoCAD

1. Right-mouse click in an opened AutoCAD drawing.
2. Select **Connect for AutoCAD**.
3. Select **Settings**.
4. On the **General** tab, enter the Planon ProCenter URL.

For example:

```
http://WebServerName:portnr/sdk
```

or, for Cloud environments:

<https://yourenvironment.planoncloud.com/sdk/>

5. Click **Save**.
6. Close AutoCAD and reopen it.

Connect for AutoCAD - Concepts

The following concepts are explained in this section:

- [Assets](#)
- [Mapping](#)
- [Move box](#)
- [Palette](#)
- [Persons](#)
- [Planon ProCenter connectivity](#)
- [Polyline](#)
- [Property set](#)
- [Reference data in Connect for AutoCAD](#)
- [Rentable units](#)
- [Spaces](#)
- [Workspaces](#)

Assets

An item such as property or object of value that is owned by a person or an organization.

An Asset is linked to a property in Planon ProCenter. Assets are classified as simple and multiple in Planon ProCenter, however, Connect for AutoCAD only supports simple assets.



The term assets in this document only refers to simple assets. Multiple assets are not supported.

Mapping

An operation that associates elements of the same type in a given domain.

Mapping in Connect for AutoCAD is a feature that groups Planon entities having the same data, by using the same hatch and color in the drawing. It helps you to track the entities usage.

When a mapping is performed on **Available workspaces (drawing)** and **Available workspaces (Planon)** in a drawing using Connect for AutoCAD, a fixed coloring is applied based on the available workplaces as mentioned below, along with the available workplace information.

Red: the available workplaces are over-occupied.

Orange: All workplaces are occupied.

Yellow: Partially occupied workplaces.

Green: No workplaces are occupied.



Mapping information for **Available workplaces (drawing)** is displayed on the palette since this is also a visible field on the palette.

Move box

A carrier of person and/or asset information from one drawing to another.

In Connect for AutoCAD, a move box is a file containing person and/or asset information which is used to move persons from one space in a drawing to another space in another drawing.

Palette

The **Palette** is a window in the AutoCAD tool.

The Connect for AutoCAD palette displays the loaded information of a selected Planon ProCenter entity and allows you to modify the data.

The palette has various features such as:

- filtering items
- mapping entities, by multi-colored highlighting (based on usage)
- move entities from one drawing to another using the move box, and so on

It also allows you to convert the selected polyline as a space/rent to/rent from unit and link a polyline as a net or gross polyline to the selected entity.

[Working with the palette](#)

Persons

An employee in an organization.

In Planon ProCenter, a person is an entity. You can manage person data in **Personnel Management**. However, using Connect for AutoCAD, you can add or move persons from one floor to another graphically.

Planon ProCenter connectivity

Connect for AutoCAD allows you to connect to a version of Planon ProCenter.

Users are prompted to log on to Planon ProCenter while using certain features in Connect for AutoCAD. Otherwise, most of the features can be used without connecting to Planon ProCenter.

Polyline

Represents the net area or the gross area of floors, spaces, flexible workspaces, rent to units or rent from units and assets.

Property set

A data set that consists of specific properties (buildings).

Depending on the authorizations of their user group, Planon ProCenter users can view or work on various property sets.

In Connect for AutoCAD, you cannot view or edit the property set for your spaces. On connecting to Planon ProCenter, the property set of the logged-on user will be used for retrieving the data. Therefore, we recommend that you use only one property set within a drawing.



For more information on property sets, refer to *Fundamentals*.

Reference data in Connect for AutoCAD

In Connect for AutoCAD, the descriptions of entities are usually changed in the drawing. However, you can also update the description of entities with Planon ProCenter data, using the **Update all reference data** feature. The descriptions of departments, cost centers, addresses, spaces and so on are updated in the drawing after a connection is established with Planon ProCenter. See [Updating the reference data in a drawing](#) for information on this feature.

Rentable units

A rentable unit is (a part of) a property that can be leased or subleased as an undividable entity. A rentable unit is always linked to a property. A rentable unit can be a hierarchical element.

In Planon ProCenter, the **Rentable Unit Management** TSI enables you to register and manage rentable units.

Rentable units you have registered in the **Rentable Unit Management** TSI can be linked to a (lease) contract in the **Contract Management** TSI.

A maximum of two levels can be defined.

There are two types of rentable units:

- Rentable units rented out to another party – Rent to
- Rentable units rented from another party – Rent from
- Connect for AutoCAD supports both the Rent to and Rent from types of rentable units.

The life cycle concept enables you to keep track of changes that have been made to a rentable unit in the course of time.

[Loading Planon ProCenter data](#)

Spaces

Spaces can be rooms, offices or specific places on a floor in a property. The space can be used as a place to work or be part of a 'rent to unit' or 'rent from unit'.

A space in AutoCAD is represented by a polyline that is marked as space and also holds the space related data. Polylines and data are a part of the AutoCAD drawing.

In Planon ProCenter, the **Space Management** TSI is designed to facilitate the effective usage of your spatial resource. It can be used to register and retrieve all kinds of data concerning to conference rooms, offices and other (work) spaces of your building.

After making changes for a drawing in **Connect for AutoCAD** and offering that drawing to **CAD Import**, you can track the changes in **Space Management**. All the changes that you make are created as new records for **Space size** and/or **Space usage** starting on the specified "date of import" in the CAD import definition.

Connect for AutoCAD cannot deal with spaces that have more than one space usage at the same time. So if you execute the function **Load Space data**, only spaces that have one space usage on the reference date will be loaded.

[Loading Planon ProCenter data](#)

Workspaces


Work area allocated to employees in an organization to conduct their work related activities.

A workspace in **Connect for AutoCAD** is a space that can be allocated to a person within a space in the drawing. The **Available workspaces** field displays the number of workspaces in a selected space that are vacant in a drawing.

This field is calculated based on the difference between the field **Number of fixed workspaces** in **Connect for AutoCAD** and the **Number of People** located in that space in the drawing.

Working with Connect for AutoCAD

The **Connect for AutoCAD** menu helps you to work with the Planon ProCenter data in the AutoCAD drawing.

 A drawing, apart from the graphical representation of Planon ProCenter entities such as spaces, rentable units, and persons, also contains a copy of the Planon ProCenter data. This data can be loaded into the Planon ProCenter database by using **CAD Import**.

Connect for AutoCAD includes:

[Working with the Palette](#)

[Loading Planon ProCenter data](#)

[Synchronizing the entities location from Planon ProCenter](#)

[Moving entities](#)

[Copying entities](#)


[Inserting entities into a drawing](#)

[Managing assets by filtering on classification group](#)

[Analyzing drawings](#)

[Deleting Planon ProCenter data \(Purging\)](#)

[Configuring settings](#)

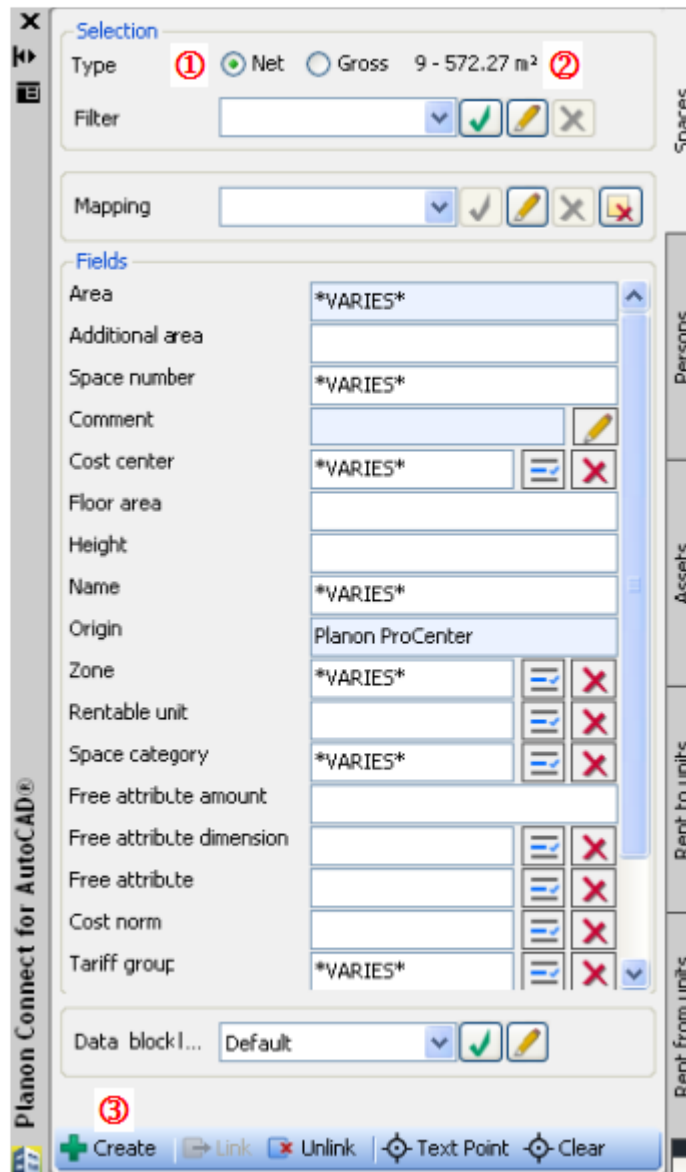
 The term “entities” is used in this document to collectively represent Planon ProCenter entities such as **Spaces**, **Persons**, **Assets**, **Rent to units** and **Rent from units**.

Working with the palette

You can use the palette to view or modify entity data, create filters and mapping, move entities from one drawing to another, load entities from Planon ProCenter and much more.

Procedure











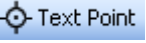

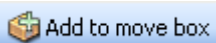
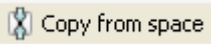
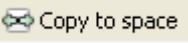
1. Start AutoCAD. In the AutoCAD drawing window, right-click to open the Context menu and point to Connect for AutoCAD.
2. Select the Palette option.
3. By default, the palette appears on the left of your Drawing window.



- 1 Indicates which type of polyline can be selected in Spaces and Rent to units and Rent from units only.
 - 2 Indicates the number of entities selected and their total area.
 - 3 Contains buttons to perform relevant actions in Connect for AutoCAD.
-
4. Select either the Spaces, Persons, Assets, Rent to units or Rent from units tab.
 5. In the Selection area, select either Net or Gross in order to work with the net or gross polylines of Spaces/Rent to units/Rent from units.
 6. Select an entity in the drawing.

You can now view/edit the entity's data in the palette.

The following table describes the functionality of various buttons of the palette:

Button	Action
	Enables you to create or edit a filter, mapping move box and data block link. Also allows you to enter a comment on an entity.
	Applies the selected filter or mapping in the drawing.
	Deletes the selected filter, field data or mapping or move box.
	Displays a list of values to be inserted in the reference field.
	Clears the entities on the Planon Mapping layer.
	Converts net polylines to a Planon entity.
<div>  The Create button can only be used if you draw a <i>new</i> polyline. If you copy an existing space polyline and use either the Link or the Create button it will result in incorrect data. </div>	
	Links a gross polyline to a net polyline which both belong to the same space.
<div>  See the warning in the above Create button description. </div>	
	Removes Planon ProCenter data from the polyline.
	Specifies a new insertion point for the text of an entity.
	Clears the insertion point specified using the text point button.
	Adds an entity to the selected move box.
	Copies data of Department and Cost center fields from spaces to persons or assets.
	Copies data of Department and Cost center fields from persons or assets to spaces.



If you make any changes to the Windows **Display Properties**, make sure you restart AutoCAD to reflect these changes. The Connect for AutoCAD layout is only supported with a **DPI Setting of 96 DPI**.

Connect for AutoCAD does not support drawings that have XRefs. You can select the relevant Planon entities for loading and synchronizing from the main drawing only.

Palette

Keyboard actions on the palette

- CTRL+Z – to undo the last modification of a field value
- CTRL+A – to select all the entities in a drawing
- CTRL+(switch from one entity tab to another) – to display a group of related entities as selected in a drawing while switching from one entity tab to another.

Example: A drawing consists of persons and spaces. Select the group of the spaces that belong to a certain department in the drawing. Press CTRL and switch to the **Persons** tab on the Palette. All the persons that are located at that moment in the spaces that have been selected in the **Spaces** tab are now selected when you switch to the **Persons** tab.

- CTRL+(Select filter) – to apply a filter on the entities that have already been selected or filtered in a drawing.

Example: Select a set of spaces in a drawing. To apply a filter on the department name for selected spaces, press CTRL and select the department name filter from the filter drop-down list on the Palette. Spaces are now selected based on the department name filter in the drawing.

- CTRL+(switch to **Assets** tab) – to display the assets as selected for the persons selected on the **Persons** tab.

Example: On the **Persons** tab, select a set of persons in a drawing. Press CTRL and switch to the **Assets** tab. The assets that are owned by one of the selected persons (**Of person** field) are selected in the drawing.

- CTRL+(switch to **Persons** tab) – to display the persons who are referenced from the **Of person** field on the **Assets** tab for the selected assets.


Example: On the **Assets** tab, select a set of assets in a drawing. Press CTRL and switch to the **Persons** tab. The persons referenced in the **Of person** field for the selected assets on the **Assets** tab are selected in the drawing on the **Persons** tab.

- At any time, if you want to add or sort pre-existing fields on the Palette, go to [Settings](#) and select the relevant entity tab.

Modifying field values

You can modify a value in an entity field:

Procedure

1. In the Fields area, click the  icon in a field. The relevant dialog box of the field appears.

For example, the **Cost Center** dialog box. Select a cost center and click **OK**.



By default, the list only contains values that have already been used in this drawing. To view more values from Planon ProCenter, click **More...** You can filter the values from Planon ProCenter by using the **Search** option. This field accepts the following wildcards:

- % , for multiple characters
- _ , for a single character

Or

Enter the relevant value in the fields such as **Department**, **Cost center**, **Space type** and so on, without having to choose from the reference list. A connection is established with the Planon ProCenter database if necessary to validate the value you have entered.


2. Enter a new value in the string field such as Name or Space number.
Enter a new value in the integer field such as Number of workspaces.
3. Enter a new value in the decimal field such as Height.
4. Enter a new value in the date field.
5. Click Save in AutoCAD to save the drawing and the Planon ProCenter data in the drawing.

You have now modified a value on the Palette and saved it in the AutoCAD drawing.

Creating filters


A filter can be created, applied and deleted. It helps you to search for an entity and work on its data accordingly.

Procedure

1. In the Selection area, click  (Add/Edit Filter).

The Filter details dialog box appears.


2. In the Filter name field, specify a name for the filter.

 By default '=' is displayed in the fields of the dialog box.

3. In the Fields area, select relevant operators per field and enter field values.

Refer to the following table for more information on operators:


Field type	Available operators
String fields Example: Name and Space number	=, Contains and Is empty
Reference fields Example: Department and Cost Center	= (single value) In (multiple values) and Is empty
Integer fields Example: Number of workspaces	=, <, >, <=, >=, Is empty and Between
Decimal fields Example: Height	=, <, >, <=, >=, Is empty and Between
Date fields Example: Start date and end date	=, <, >, <=, >=, Is empty and Between

For example, if you use the **In** operator, click  in the relevant field. The **In** dialog box appears.

In **Available**, select a single field and double-click to move it to **In Use**.

Or

Select multiple fields and click the right arrow to move the items to **In use**.


 In **Available**, click **More...** to add more values from Planon ProCenter.

In **In use**, you can view the selected fields.


Click **OK**.

 If multiple fields are selected *VARIES* is displayed in the selected field.

4. Click Save. You have now created a filter.

 When you select a filter (Space, Assets, Person etc), the filter name in the dropdown box is highlighted (in red color) to indicate that the filter is active. In such a case, you can only select the elements that are relevant to the active filter in the drawing.

5. Click ☒ (Apply filter) to apply a filter. Based on the filter criteria, the relevant items are selected in the drawing.

 The created filters, mappings, logging and block definitions are by default saved in or deleted from:

Filters: *C:\Documents and Settings\<User directory>\Application Data\Planon\Planon Connect for AutoCAD\Filters.*


Mappings: *C:\Documents and Settings\<User directory>\Application Data\Planon\Planon Connect for AutoCAD\Mappings.*

Logging: *C:\Documents and Settings\<User directory>\Application Data\Planon\Planon Connect for AutoCAD\Logs*


Block Definitions: *C:\Documents and Settings\<User directory>\Application Data\Planon\Planon Connect for AutoCAD\BlockDefinitions*

Creating mapping

A mapping can be created, selected, deleted and cleared. The Mapping option helps you to highlight the entities which are having the same usage.

 If your drawing contains unclosed polylines that represent **Spaces**, **Rent to units** or **Rent from units**, then the outcome of area calculations, available workspace calculations and copying data from and to spaces might be incorrect. We recommend that your drawing contains only closed polylines.


Procedure

1. For mapping text fields area, click  (Add Mapping). The Mapping Details dialog box appears.

Refer to **Mapping fields** for a description of various fields which are available in the dialog box.

2. In the mapping text fields section, you can select the relevant fields to display their data in the drawing after mapping is performed. Additionally, you can check the Show details for reference fields option to display the Code (or) Code Group (or) Description (or) Code Group

and Description for these reference fields along with the default list of reference fields.

1. In **Available**, select fields to display information specific to an entity in the drawing.
2. Select an item in **Available** and double-click to appear in **Visible**.
3. Select multiple values and click the right arrow to move them to **Visible**.
4. Sort the items in **Visible** the way you want to view them in the entities of a drawing.
5. Select **Display colors in background** to see the mapping text highlighted by a background color matching the mapping color of the entity. The mapping text is then displayed in white or black depending on the background of the drawing.
 3. Click Save.
 4. Select the entities for which you want to apply a mapping or press CTRL+A to select all the entities in a drawing.
 5. On the Palette, in the Mapping field, select a mapping to apply. Click  (Apply mapping).

You have now applied the selected mapping.



You can reposition the legend using the **Settings > Mapping > Legend insert point** option.

When a mapping is applied, a new layer is created. Make sure not to draw on this layer since the data on this layer will be erased when a new mapping is applied.

If you apply mapping on a large number (in hundreds) of entities, it may take several minutes for the mapping to complete.

Specifying a text insertion point

You can specify the text location of an entity using this feature, such as the name of a department. The text point can be set outside an entity if the entity is too small to display the mapping text. You can easily identify the relevant text of an entity with a line which is connecting.

Procedure

1. Select an entity tab.
2. Select a single entity or multiple entities. The Text Point button on the palette becomes available. Usually, the text point for a single entity is specified. However, if you selected multiple entities, the new text point will be applied for all of them.
3. Click Text Point to specify a new location for the mapping text to display.
4. Apply mapping or use Automatically highlight current selection in the settings dialog box to verify your entity's text location.

You have now displayed the mapping text in the specified location.

Clearing a text insertion point

You can clear the text insertion point so that the mapping text will be displayed on the default position of the entity.

Procedure

1. Select the entities whose text insertion point you want to clear.
2. Click Clear on the palette.
3. Apply a mapping to test your text location. You have now cleared the text insertion point.

Converting polylines into Planon ProCenter entities

You can convert a polyline in a drawing into a Planon ProCenter entity such as **Space**, **Rent to units** or **Rent from units**.

This feature has two options:

- **Create:** Select polylines and convert them as **Space**, **Rent to units** or **Rent from units**. The current setting of net or gross defines what type of polyline it will become.
- **Link:** Select a **Space**, **Rent to units** or **Rent from units** and link a polyline to it as a net or gross polyline.



In order to create a new space or to link a new space to the existing entity in a drawing, execute **Load Space data...** at least once.

Procedure

1. On the Palette, select the Spaces or Rent to units or Rent from units tab.
2. Select either the Net or Gross option.
3. In the bottom area of the palette, click Create.
4. On the drawing, select a polyline and do right click or press Enter. You can also select multiple polylines to convert them into Planon ProCenter entities.
5. On the warning message box, click Yes. This converts the selected polyline into Planon ProCenter entity.
6. On the information box, click OK.

The created entity is selected.

Linking a net polyline to a gross polyline

Procedure

1. Select the Spaces, Rent to units or Rent from units tab for which you want to link a net polyline to a gross polyline.
2. Select the net polyline, click on the Link button and then select the gross polyline.
3. On the warning message box, click Yes.
4. On the information message box, click OK.

You have now linked a net polyline to a gross polyline.

Removing Planon ProCenter data from a polyline

Procedure

1. Select Space, Rent to units or Rent from units.
2. Click Unlink.
3. On the warning message box, click Yes.

You have now removed the Planon ProCenter data from the polyline.



Press **ESC** to cancel the linking process or creation process.



If your drawing contains unclosed polylines that represent **Spaces, Rent to units or Rent from units**, then the outcome of area calculations, available workspace calculations and copying data from and to spaces might be incorrect. We recommend that your drawing contains only closed polylines.

Copying data from a space to person or asset

You can copy the department data or cost center data of a space to the persons or assets located in that space.

Procedure

1. Select the Persons or Assets tab.
2. In the drawing, select the person(s) or the assets(s).
3. Click Copy from space.
4. The department and/or cost center values of the space are now copied to person(s) or asset(s).
5. If the Space contains no value for department and/or cost center, the value for department and/or cost center of the Person or Asset will not change.

Copying data from persons or assets to a space

You can copy department data and cost center data of persons or assets to the space they are located in.

Procedure

1. Select the Persons or Assets tab.
2. In the drawing, select the person(s) or the assets(s).
3. Click Copy to space.
4. The department and cost center values of the person(s) or asset(s) are now copied to the space.



If the department or cost center is not similar for all the selected persons or assets, it is not copied to the space. Empty values are not considered.



If your drawing contains unclosed polylines that represent Spaces, Rent to units or Rent from units, then the outcome of area calculations, available workspace calculations and copying data from and to spaces might be incorrect. We recommend that your drawing contains only closed polylines.

Loading Planon ProCenter data

You can load Planon ProCenter information for entities such as **Spaces**, **Persons**, **Assets**, **Rent to units** and **Rent from units** into Connect for AutoCAD. Some entities (**Spaces**, **Rent to units** and **Rent from units**) in the drawing are updated with the values based on a specified reference date.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Load <entity> data.
2. For Spaces, Rent to units and Rent from units, the Set Reference date dialog box appears.
3. In the Reference date field, specify a date to retrieve the Planon ProCenter information and click OK.



The **Set Reference date** dialog box does not appear while loading person or asset data.

4. If you select Load asset data, on the Load assets filter dialog, you can set filters to load assets data based on a classification group.
5. The Loading <entity> data dialog box with a progress bar is displayed while loading the data.
6. An information message box appears with information about what was loaded, such as loaded, ended and deleted spaces. Click OK.

7. Select an entity to view the loaded information.
You have now loaded the Planon ProCenter entity information.



We recommend that you use only one [property set](#) for a drawing. **Load <entity> data** will load only data for entities which have been imported by CAD-import.

[Rentable units](#)

[Spaces](#)

Updating the reference data in a drawing

You can update the reference data in a drawing without having to load the Planon entity data.

Referenced data in a drawing, for example cost centers, departments or other referenced data / pick lists, can be updated if the descriptions of this referenced data were changed in Planon ProCenter. After the update, Connect for AutoCAD will display the changed descriptions in the drawing.

Procedure

1. On the context menu, point to Connect for AutoCAD and select Update all reference data.
2. After establishing a connection with Planon ProCenter, a confirmation message which contains the updated reference data is displayed.
3. Click OK.

You have now successfully updated the reference data without loading the Planon entity data.

Synchronizing the entities location from Planon ProCenter

You can synchronize the location data of persons and assets (property and space in which persons or assets are located) from Planon ProCenter to Connect for AutoCAD.

When you synchronize your drawing with Planon ProCenter, entities that are present in Planon ProCenter but not in the drawing, will be placed in their respective spaces in the drawing.

First, check the [Settings for inserting persons or assets](#) to select an appropriate layer and block for inserting these entities into a drawing.



To synchronize entities from Planon ProCenter to Connect for AutoCAD, you should assign a space for persons in Personnel Management and a space for assets in Asset Management. For more information on assigning a space to persons and assets, refer

to **Personnel Management** and **Asset Management** of the Planon ProCenter user documentation.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Synchronize person locations to synchronize persons or Synchronize asset locations to synchronize assets.
2. When synchronizing assets, on the Load assets filter dialog, set the filter to synchronize relevant assets as described in Managing assets by filtering on classification group.
3. On the Synchronize person locations or Synchronize assets locations dialog box, select the appropriate options.

Refer to [Synchronize assets locations fields](#) for a brief description of these options.

4. Click OK to connect to Planon ProCenter to synchronize person or asset location data.
5. Click OK. Synchronization may take a few minutes to complete. Upon completion of synchronization, a summary of the synchronization results is displayed on the information dialog box.



After synchronization, an extended log file (.log) with synchronization details is created in the folder specified in the [settings for synchronization logs](#).

Now, you have synchronized person or asset location data from Planon ProCenter to **Connect for AutoCAD**. You will see the entities inserted on the drawing.

Settings for inserting persons or assets

Inserting entities into a drawing

Moving entities

With Connect for AutoCAD, you can move entities such as persons and assets from one space in a drawing to a space in another drawing.

You can move persons or assets from one drawing to another, by following this procedure:

Procedure

1. Create a new move box.
2. Add entities to a move box from the source drawing.
3. Switch to the destination drawing.

4. Add entities from a move box to the destination drawing.

Creating a new move box

You can create a new [move box](#):

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select the first empty entry.
4. Click on the Add/Edit button to open the Move box details dialog box.
5. Enter a name for the new move box and click Save.

You have now created a new move box. The move box you have created will be stored at the location specified in [Move box folder settings](#).

Adding entities to a move box

You can add persons or assets from the drawing to a move box by opening a source drawing with persons and/or assets in AutoCAD. You can also move the assets related to persons when you move the persons from the drawing and vice versa to a move box. Check [Settings for moving persons or assets](#), to move the assets or persons when you move their related entities.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select a move box.
4. Select one or more persons or assets from the drawing.
5. On the Palette, at the bottom, click on the Add to move box button. The selected persons or assets are now removed from the drawing and added to the move box.

You have now added the entities to a move box. The move box that you created will be saved at the location you specified in [Settings for moving persons or assets](#).



If you have set the option to add the personal assets along with persons in the [Settings](#) dialog box, after you click on **Add to move box**, the related assets of the persons are subsequently added to the move box along with the persons from the drawing.



If you have set the option to add owners along with their assets in the [Settings](#) dialog box, after you click on **Add to move box**, the related owners of the assets are subsequently added to the move box along with the assets from the drawing.

Viewing and deleting contents of a move box

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select a move box.
4. Click on the Add/Edit button to open the Move details dialog box.
5. Select the Persons or the Assets tab.
6. To delete an entity from the move box, select the entity entry and press Delete on your keyboard.
7. To clear all the persons or assets from the move box, click Clear all.
8. Click Save to save your actions.



You can also press **Ctrl + Shift** on your keyboard and select multiple person or asset entries.

Filtering entities in a move box

First, [create a filter](#) that you want to apply on the move box entities on the **Palette**.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select the move box to apply a filter on its entities.
4. Click on the Add/Edit button to open the Move box details dialog box.
5. Select the Persons or the Assets tab.
6. From the Filter drop-down list, select a filter.

Click on the ☒ **Apply filter** button. Based on the filter you have applied, entities are displayed in the move box. To undo the filter, select another filter from the drop-down list.



If a filter is highlighted in the **Filter** list box, it indicates that the highlighted filter is already applied on the entities in the entity tab. To remove the filter, from the **Filter** drop-down list, select another filter. This selection will remove the applied filter and will display all the elements that are in the move box for an entity in the subsequent entity tab.

Adding entities from a move box to a drawing

You can add entities such as persons and assets from the move box to a drawing by opening a drawing in AutoCAD to which you want to add the entities.

- Check [Settings for moving persons or assets](#) to select an appropriate layer and block for inserting these entities into a drawing.
- Check [Settings for moving persons or assets](#) to move the related entities of persons and assets if you want to move them from the move box to a drawing.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select a move box from which you want to add the entities to the drawing.
4. Click on the Add/Edit button to open the Move box details dialog box.
5. Select one or more entities to add to the drawing (press **Ctrl** and make multiple selections) and click on the Add to drawing button.
6. Click on a point in the drawing where you want to insert these entities. These entities are then removed from the move box and are placed within a space in the drawing.



You can also add entities by clicking at a point outside a space in the drawing and can later manually assign spaces to each of these entities.

7. Switch to the other tab (Persons or Assets) and repeat step 4 and 5 to add entities of the other type to the drawing.
8. Click OK or Save after adding the entities to the drawing.

Now, you have added entities from the move box to a drawing.



If you have enabled the options to add related entities of persons and assets in the [Settings](#) dialog box, the related entities of the persons and the assets are added to the drawing after you click on the **Add to drawing** button.

Loading a move box with entities from Planon ProCenter

Prior to loading a move box with persons or assets in Connect for AutoCAD, make sure you do the following in Planon ProCenter.

- In Personnel , select a person from the personnel list or in Assets , select an asset from the assets list.

- In the **Move date** field, enter the date on which you want to move the person or asset. The date should be later than or identical to the current date. If **Move date** is not available on the layout of Personnel and Assets , ask your application manager to add this field to the layout in Layouts .

You can apply a filter on persons or assets based on specific criteria before you load these entities into the move box from Planon ProCenter.

First, [create a filter](#) that you want to apply on the move box entities on the **Palette**.



To know more about adding an optional field to a layout, refer to **Customizing a selection level's layout** in the documentation about TSIs .

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Palette.
2. On the Palette, click the Persons or Assets tab.
3. In the Move box area, click on the drop-down list and select a move box on which you want to load entities from Planon ProCenter.
4. On the Move box details dialog box, if you want to load the specific entities into the move box, select the filter that you created from the Filter drop-down list.
5. Click on the Load from Planon button.

The entities for which the move date is greater than or equal to the current date with the specified filter criteria are loaded into the move box. If you want to remove the filter and load all the relevant entities, from the **Filter** drop-down list, select the blank entry. Now, you can reload the move box with entities without setting a filter on any of the entities.

Now, you have loaded entities from Planon ProCenter to the move box. You can also [add these entities to another drawing](#).

Copying entities

A Planon ProCenter entity (**Spaces, Assets, Persons, Rent to units and Rent from units**) can be copied and the information relevant to the copied entity can be specified manually in the palette.



We recommend that you do not use copy-related options such as **Copy, Array and Mirror** on the **Modify** menu in AutoCAD. In case you use them, always perform [purging](#) to remove the additional data of Planon entity information that has been created on your drawing after you **Copy, Array** and/or **Mirror** Planon entities.

Procedure

1. Open the CAD drawing.
2. Select the Planon ProCenter entity you want to copy.
3. On the Edit menu, use the Copy and Paste options or CTRL+C and CTRL+V respectively.
4. Convert the copied polylines into a Space / Rent to unit / Rent from unit by Converting polylines as entities.
5. Enter Planon ProCenter information manually to a copied entity.
You have now copied the Planon ProCenter entity.



If you make multiple copies of a Planon ProCenter entity, make sure that you change the relevant information on the Palette manually. This will prevent that the copied entity causes multiple entries in the drawing database.

Inserting entities into a drawing

Connect for AutoCAD features, such as moving entities using a move box and synchronizing locations, allow you to insert entities such as persons and/or assets as block references. Inserting a block reference for these entities is determined by the following rules:

Persons

When using a move box:

- The block (**Applied symbol name**) from the move box is used.
- If the block (**Applied symbol name**) is not present in the target drawing or in the AutoCAD search paths, the default block that is defined in [Settings for inserting persons or assets](#) is used.
- When synchronizing, the default block that is defined in [Settings for inserting persons or assets](#) is used.

Assets

When using a move box:

- The block (**Applied symbol name**) from the move box is used.
- If the block (**Applied symbol name**) is not present in the target drawing or in the AutoCAD search paths, the block (**AutoCAD symbol name**) from the move box is used.
- If the block (**AutoCAD symbol name**) is not present in the target drawing or in the AutoCAD search paths, the default block that is defined in [Settings for inserting persons or assets](#) is used.

When synchronizing:

- The **AutoCAD symbol name** from Planon ProCenter is used.
- If this block is not present in the target drawing or in the AutoCAD search paths, the default block that is defined in [Settings for inserting persons or assets](#) is used.

Block Attributes

When you use a move box to move assets and/or persons from one drawing to another, the block attributes will also be moved. If the block in the target drawing does not contain the block attributes, you can choose to append these attributes to the block in the target drawing by checking the option **Append new attributes** on the **Move box** dialog box.

[Synchronizing the entities location from Planon ProCenter](#)

[Settings for inserting persons or assets](#)


Updating space data blocks

You can store space data in block attributes which are placed inside the spaces in a drawing. This will also allow the users of DWG viewer to see the space data on the drawing.

Procedure

1. Go to the Context > Connect for AutoCAD menu.
2. Select Analyze drawing, to analyze the drawing structure.
3. On the Context > Connect for AutoCAD menu, select Palette.
4. On the Palette, click the Spaces tab.
5. In the Data block link section, click the Add/Edit button.
6. On the Data block details dialog box, select a Layer and a Block from the drop-down list, to define the block, layer and field relation.
7. In the Fields and attributes section, select a field name from the Available list.
8. In the Attribute tags column, select a block attribute to map it onto the selected field name.



Click the  button to map the selected field name and the block attribute.

9. You can map the relevant fields onto the available block attributes for the block you selected from the drop-down list.
10. Click Save.
11. Click the Apply button.

The space block data in the selected space layer is updated. The space block definitions are stored at the following location: *C:\Documents and Settings\<User directory>\Application Data\Planon\Planon Connect for AutoCAD\BlockDefinitions*

Managing assets by filtering on classification group

For assets, you can specify a classification group(s) in order to limit the assets that you want to manage in your drawing. By setting a filter on a classification group, only the assets of the selected group(s) will be loaded or synchronized.

You can also set a default asset (group) filter while loading and synchronizing assets.

Procedure

1. On the Context menu, point to Connect for AutoCAD and select Load asset data or Synchronize asset locations.
2. On the Assets filter dialog, you can specify a filter for the asset.
3. Check the Filter on classification group option to view the list of available classification groups.
4. Move the classification groups from the Available section to the In use section.
5. Select Ignore or Delete to retain or remove Planon data of other assets on the drawing when you load or synchronize assets.



To load your [default asset filter](#), click the **Load default asset filter** button on the **Asset filter** dialog and click **OK**.

6. Click OK to continue with Load asset data or Synchronize asset locations.

You have now set filters to classify assets that you want to manage on the drawing.



If you do not want to set a filter, for example if you want to manage all the assets irrespective of their classification group, uncheck **Filter classification group** and click **OK** to continue with **Load asset data** or **Synchronize asset locations**.

Analyzing drawings

If your drawing consists of nested entities, use the **Analyze drawing** feature to make sure that the area calculation and hatching is correct for the nested entities.

Nested entities can be spaces, holes or constructional elements. They exist as space within a space or an excluded area in a space. Therefore, when calculating the area and hatching of spaces, all these type of nested entities are taken into account.

If you have applied a Space Norm during **CAD Import**, the threshold values as specified in that Space Norm will also be applied in Connect for AutoCAD.

Procedure

1. In the Context menu, point to Connect for AutoCAD and select Analyze drawing.

There are two ways to analyze a drawing:

- Manual analysis
- Automatic analysis

For **Manual analysis** select **Analyze drawing**. An information message box appears after completing the analysis.

2. For Automatic analysis in Settings, select General and select Automatically analyze drawing. This option automatically analyzes the drawing before saving.



If your drawing contains unclosed polylines that represent **Spaces**, **Rent to units** or **Rent from units**, then the outcome of area calculations, available workspace calculations and copying data from and to spaces might be incorrect. We recommend that your drawing only contains closed polylines.

Deleting Planon ProCenter data (Purging)

You can delete additional entries of Planon ProCenter entity information that are copied, arrayed, and/or mirrored in the drawing.

In the **Context** menu, point to **Planon** and select **Purge Planon data**.

You can purge Planon data in two ways:

Manual purging

1. Select the **Purge Planon data** option. A dialog box appears that shows the number of deleted records.
2. Click **OK**.

Automatic purging

1. In **Settings**, select the **General** tab and select the **Automatically Purge Planon data** checkbox. This option automatically deletes the unused data while saving a drawing without displaying any information.
2. Click **OK**.

You have now deleted the unused information.

Configuring settings

To configure settings for Connect for AutoCAD, use the following procedure:

1. Go to the Context menu.
2. Point to Connect for AutoCAD and select Settings.

The Settings window appears.

General settings

If you want to specify the general settings, select the **General** tab and complete the relevant fields in the dialog box. Refer to [General settings fields](#) for the descriptions.


Adding and sorting fields

You can add and sort fields for an entity on the Palette. This setting is specific to your computer.

Procedure

1. Select the entity tab for which you want to sort fields.

In the **Palette fields** area, select a field from the **Available**

section and click the  right arrow to move the field to the **Visible** section.

2. In the Visible section, you can sort the fields as required. You can use the buttons on the right side of the dialog box to rearrange the position.
3. Click OK.


You can view the fields in the same order as you would like to see them on the palette as well as on the filter dialog boxes. The selected order will also be applied in the move boxes.

Highlighting the selected entity

Procedure

1. In the Highlighting section, check the option Automatically highlight current selection to highlight the selected entities of a drawing with the selected mapping file criteria.
2. Specify a Mapping file to highlight the selected entity with the hatch and color of the mapping file.
3. Click OK. This setting is specific to your computer.

 The mappings that are created in the **Mapping** field on the **Palette** are listed in **Mapping file** drop-down box in this section.

 For more information on mapping, refer to [Creating mappings](#).

Mapping settings

You can make legend and mapping settings for all the entities in a drawing.

Procedure

1. Select an entity tab for which you want to configure the mapping settings.
2. Complete the relevant fields in the mapping area. Refer to Mapping setting fields for the description.
3. Click OK.

You have now specified a location for the legend and configured the text size in a drawing for an entity.

Settings for inserting persons or assets

You can specify a layer and a block to insert one or more persons or assets into a drawing, while moving and synchronizing entities. This setting is specific to your drawing.

Procedure

1. In the Settings dialog box, select the Persons or Assets tab.
2. From the layer drop-down list, select a layer.
3. From the block drop-down list, select a block.
4. Click OK to save your settings.



If a block appears too small or too large after inserting a person or an asset, please check your block unit and drawing unit. We recommend that you use identical units for drawing and block.

[Synchronizing the entities location from Planon ProCenter](#)

[Inserting entities into a drawing](#)

Settings for moving persons or assets

You can specify a location for saving move boxes.

Procedure

1. In the Settings dialog box, select the Persons or Assets tab.
2. Specify a folder path to save the move boxes. This folder can exist anywhere on your computer.
3. Select the General tab.

4. Select the Move personal assets along with persons and the Move owners along with their assets options to move the related entities of persons or assets from the move box to a drawing and from a drawing to the move box.
5. Click OK to save your settings. This setting is specific to your computer.

Settings for synchronization logs

You can specify a location to save synchronization logs.

Procedure

1. In the Settings dialog box, select the Persons or Assets tab.
2. Specify the folder path to save the synchronization logs. This folder can exist anywhere on your computer.
3. Click OK to save your settings. This setting is specific to your computer.



If the content of a synchronization log contains Unicode characters, you must set the encoding to UTF-8 in the viewer to view Unicode characters.

Settings for default asset filters

You can specify default settings for loading and synchronizing assets.

Procedure

1. In the Settings dialog box, select the Assets tab.
2. Click the Default asset filter button.
3. On the Assets filter dialog, you can specify a filter for the asset.
4. Check Filter on classification group option to view the list of available classification groups.
5. Move the classification groups from the Available section to the In use section.
6. Select Ignore or Delete to retain or remove Planon data of other assets on the drawing when you load or synchronize assets.
7. Click OK to save your settings. This setting is specific to your computer.

Commands in Connect for AutoCAD

Use the following commands in the command line window of C to perform relevant tasks in Connect for AutoCAD.






Command	Action
plnAbout	Opens the About window
plnAnalyzeDrawing	Analyzes the drawing in order to activate area calculation of nested or enclosed entities.
plnLoadAssetData	Loads Planon asset data
plnLoadLettableUnitData	Loads Planon rent from unit data
plnLoadPersonData	Loads Planon person data
plnLoadRentableUnitData	Loads Planon rent to unit data
plnLoadSpaceData	Loads Planon space data
plnPalette	Loads the Palette
plnPaletteAssets	Switches to the Assets tab if the Palette is open
plnPaletteClose	Closes the Palette
plnPaletteLettableUnits	Switches to the Rent from units tab if the Palette is open
plnPalettePersons	Switches to the Persons tab if the Palette is open
plnPaletteRentableUnits	Switches to the Rent to units tab if the Palette is open
plnPaletteSpaces	Switches to the Spaces tab if the Palette is open
plnPurge	Purges Planon data

Command	Action
plnSelectionMode	Activates either the AutoCAD mode or CAD Integrator mode to select the entities of a drawing.
plnSettings	Opens the Settings dialog box
plnSynchronizeAssets	Synchronizes Planon asset data
plnSynchronizePersons	Synchronizes Planon person data

Connect for AutoCAD – Field Descriptions

Mapping fields

Field	Description
General area	
Mapping name	Enter a name for the mapping.
Map on field	Specify a field to map. For example, Department or Space standard .
	 In Connect for AutoCAD you can specify the maximum level of detail for Department and Space standard (LVL1, LVL2, LVL3). This means that all Departments (or Space standards) on a lower level than selected, will be grouped together to this maximum level of detail.
Include entities without value	Select the check box to include entities that do not have a value for the selected field. For example, this option highlights the spaces which are not linked to a department.
	 If you select this check box, the Color for entities without value option becomes available in the Coloring area. Specify a color to highlight the entities without a value. This option is disabled for Available workspaces (drawing) and Available workspaces (Planon) fields.
Legend area	
Show legend	Select this check box to show a legend in the mapping.
Legend title	Enter a header name for the Legend to display as title in the drawing.
Coloring area	
Coloring type	From the drop down list, specify a coloring type.

Field	Description
	<div>  <p>If you select Fixed Color type, the Color field becomes available. All the elements will get the same (selected) color. The Planon color type is visible only when the field selected in the Map on field section has a Planon color associated with it. If you select AutoCAD Color Index, random colors are applied based on the AutoCAD schema.</p> <p>If you set the coloring type to Planon color for fields such as Department and Cost center that have a color linked in Planon ProCenter, the entities associated with these fields (Department and Cost center) will display the defined colors in Planon ProCenter after performing mapping on these fields. This option is disabled for Available workspaces (drawing) and Available workspaces (Planon) fields since they have fixed coloring patterns. For more information, refer to Mapping.</p> </div>
Color	Specify a color to highlight the entities (if you have selected Coloring type as Fixed color).
Color for entities without value	Specify a color to highlight the entities without a value.
Hatch area	
Show hatch	Select the check box to show hatching in the mapping.
Hatching type	<p>Select one of the following options to indicate the hatching type:</p> <ul style="list-style-type: none"> • Planon hatch pattern - The hatch pattern is automatically picked from the color and hatching fields in Spaces. For more information, see <i>Spaces > Space mapping per department or department level</i>. • AutoCAD hatch pattern - If you select this option, the hatch pattern is taken from the fields Pattern, Scale and Angle.
Pattern	In the Hatch pattern palette dialog box, select a pattern to hatch.

Field	Description
Scale	Specify a scale for the hatch pattern.
Angle	Specify an angle for the hatch pattern.
Scale correction method	<p>Select one of the following options to indicate the correction method for the scale:</p> <ul style="list-style-type: none"> Manual correction factor - By selecting this option, you must enter the correction factor manually in the field Correction factor. Planon correction factor - The correction factor is automatically picked from the field Floor hatch scale in Floor attributes. For more information, see <i>Spaces > Floor attributes fields</i>.
Correction factor	Enter a number for the hatch pattern correction factor. The minimum value is 0 and there is no maximum value. Based on this number, the hatch pattern is displayed on the CAD drawing. The larger the number the greater the distance between the hatch lines. This field is enabled only if Manual correction factor is selected in the Scale correction method field.




For **Person** and **Asset** mappings the hatch area is disabled, because **Blocks** cannot be hatched.

Synchronize assets locations fields

Field	Description
Persons not located on this floor in Planon or Assets not located on this floor in Planon	<p>You can choose to perform one of the following actions on persons or assets present in your drawing, but which are not located on that floor in Planon ProCenter.</p> <p>Ignore: Retain persons or assets in the drawing.</p> <p>Delete: Delete persons or assets from the drawing.</p> <p>Add to move box: Remove persons or assets from the drawing and add them to a move box. Select a move box from the drop-down list.</p>

Field	Description
Load Planon data for inserted persons or Load Planon data for inserted assets	By selecting this option, the Planon ProCenter person or asset data will be loaded for persons or assets who are newly inserted in the drawing.

General settings fields

Field	Description
Language	<p>Specify a language for Connect for AutoCAD.</p> <div>  Restart AutoCAD, to activate the selected language. This setting is specific to your computer. </div>
Scale factor	<p>Specify a value to convert the existing measurement unit used in your drawing into a new unit. This setting is specific to your drawing.</p> <p>Simultaneously, update the settings for the Legend unit field with the new unit. The converted value with the relevant unit is displayed on the palette.</p> <p>Example: Assume that the existing unit for your drawing is in inches. To convert from inches to meter, specify the conversion rate of 0.0254 (1 inch = 0.0254 meter), in the Scale factor field. Now, when you select a space, you will find that the unit for area is displayed in square meters in the legend and also on the palette.</p>
Legend unit	<p>Specify a measurement unit. This unit appears both on the palette and in the legend of a drawing. The selected units are displayed as m2 or ft2 respectively. This setting is specific to your drawing.</p>
Decimal precision	<p>Select an appropriate decimal point value (i.e. the number of digits following the decimal point) from the drop down list, to display the accurate value in the fields related to Area on the Palette and on the legend after Mapping. This setting is specific to your computer.</p>
Planon ProCenter url	<p>Specify the SDK URL of Planon ProCenter to allow Connect for AutoCAD to retrieve values, for example:</p> <div> http://WebServerName:portnr/sdk </div>

Field	Description
	<p>or, for cloud environments:</p> <div> https://yourenvironment.planoncloud.com/sdk/ </div>
Selection mode	<p>Select AutoCAD mode to use the AutoCAD way of selecting entities in a drawing.</p> <p>Select CAD Integrator mode to select the entities by a single mouse click at any point inside the polyline. This setting is specific to your computer.</p>
Automatically purge Planon data	Select the checkbox to delete the additional entries of entity data while saving a drawing. This setting is specific to your computer.
Automatically analyze drawing	Select the checkbox to analyze a drawing while saving a drawing. This setting is specific to your computer.



It is possible that your AutoCAD drawings have an underlying structure which prevents the “**CAD integrator** selection mode” to work correctly. In that situation you have to switch to **AutoCAD** selection mode.

Mapping setting fields

Field	Description
Legend text height	Specify a height for the text in the legend.
Text height	Specify a height for the mapping text.
Legend insert point	Specify an insert point to locate legend in the drawing. The insertion point updates the values of the X – axis and Y – axis accordingly.

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