



## Frequently Asked Questions

Planon Software Suite  
Version: L126

**Planon**  
Building Connections

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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](mailto: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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# Frequently asked questions

In this section you will find a list of often asked questions and their answers.

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## Cloud

### 1. Cloud

Question	Answer
When is an upgrade planned for my Cloud Environment?	<p>Every three months we will first upgrade DTA and 4-5 weeks later P is upgraded to the same version as DTA.</p> <p>Please see the following link for the dates: <a href="#">Cloud maintenance</a> (Customer portal).</p>
Can I give the Cloud admin an end date?	<p> You need credentials to log in to the customer portal.</p> <p>No, you cannot do this account.</p>

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Question	Answer
How can I request a PEN test in the Planon Cloud?	<p>The Cloud admin user is needed to communicate between the Cloud backend systems.</p> <p>See also: <a href="#">System accounts (Accounts)</a>.</p> <p>See <a href="#">Security assessments (Customer portal)</a>.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <span style="color: #0070C0; font-size: 2em; border: 1px solid #0070C0; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">i</span> You need credentials to log in to the customer portal.         </div>
Can Planon Support reset my users account password?	No, Planon Support does not have access to your Cloud environment.
Email sent by my Cloud environment are not being received by the recipient?	We recommend configuring SPF email authentication - for more information/instructions see <a href="#">Emailing in the Cloud</a> .
In my Cloud gadget I see multiple large backups (master backups). Can I delete these?	<p>The Planon Cloud needs a master backup to be able to restore prior dates.</p> <p>For example, when you see two master backups, most likely there is still an incremental backup in the same week as the master backup. For more information see the article about <a href="#">Cloud backups</a>.</p>
How do I configure a custom domain name for my Cloud environment?	From the Environment management gadget you can configure a custom URL, please follow the steps in <a href="#">Custom URLs and certificates</a> .
How do I enable IP whitelisting in my Cloud environment?	IP Whitelisting is a premium service that Planon offers. To enable this you need a additional license in your environment.
My Cloud environment is down outside office hours, how do I receive help?	<p>To configure a whitelist please follow the steps described in <a href="#">IP whitelisting</a>.</p> <p>Planon offers a 24/7 service for Cloud production standstills:</p> <ol style="list-style-type: none"> <li>1. Please dial the telephone number listed on the <a href="#">customer portal</a> &gt; <b>Cloud</b></li> </ol>

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Question	Answer
	> <b>Cloud Maintenance</b> (credentials required).
How do I install a hotfix?	<p>2. Stay on the line until the message is finished. Outside office hours, the call will be transferred to an emergency number.</p>
	<p>A hotfix is identified by a specific release number (for example: 96.0.0.2, where the last digit indicates the number of hotfix issues for a specific release).</p>
	<p>By restarting the Cloud environment, the most recent hotfix will be installed automatically.</p>
	<p>On-premise customers can download the latest service pack from the <a href="#">Customer portal</a>.</p>
	<p> You need credentials to log in to the customer portal.</p>
How do I restart the Planon Cloud environment?	<ol style="list-style-type: none"> <li>1. Go to <b>Home</b></li> <li>2. Go to <b>Environment management</b> gadget</li> <li>3. Select <b>Danger zone</b></li> <li>4. Click on <b>Restart</b></li> <li>5. Wait for your environment to restart. (Generally, this takes up to 10 minutes).</li> </ol>
How do I provide Planon Support with a copy of my Planon environment?	<p>The information in this article applies to Planon Cloud environments.</p> <p>Planon Support can request a copy of your Planon environment to investigate and debug issues that Planon Support cannot replicate.</p>
	<p><b>Procedure</b></p>
	<ol style="list-style-type: none"> <li>1. Log in to the Planon Cloud environment that you want to download. (If you log in to your Production</li> </ol>

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Question	Answer
Are there any limitations on disk space usage?	<p>environment, you can only download a copy of your Production environment).</p> <ol style="list-style-type: none"> <li>2. Go to <b>Home</b>.</li> <li>3. Go to the <b>Environment management</b> gadget.</li> <li>4. Select <b>Backup</b>.</li> </ol>
How can I add gadgets to the Home page?	<ol style="list-style-type: none"> <li>1. Select a backup to download.</li> <li>2. Check the date of the backup you want to download.</li> </ol> <p>(This can be any type of backup as long as the <b>Export</b> button is available.)</p> <ol style="list-style-type: none"> <li>3. Click on <b>Export</b>.</li> <li>4. A pop-up opens with a context menu where you can choose between a database copy and files.</li> <li>5. Download and zip the bak file.</li> <li>5. Wait for your environment to restart. This generally takes up to 10 minutes.</li> </ol>
I cannot log on to my Cloud environment, are there any issues?	<p>The available disk space is limited, but can be extended.</p> <p>See the information about the <a href="#">Disk</a> tab.</p>
Where do I obtain the environment credentials?	<p>See <a href="#">Adding gadgets to the homepage</a></p> <p>To check whether there are technical issues that affect your Cloud environment, please check the <a href="#">Trust dashboard</a>.</p>
	<p>The environment's requestor will receive the initial (supervisor) credentials via mail.</p> <p>All other environment credentials, such as WebDAV, can subsequently</p>

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Question	Answer
How do I configure SSO?	<p>be obtained and administered via the <a href="#">Environment management gadget</a>.</p> <p>On initial setup, these credentials must be reset before first use.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;">  Please save the credentials securely since after resetting they are no longer retrievable.         </div>
How do I create an index in the Cloud	<p>For the Cloud, Single Sign On (SSO) can be configured in Environment management gadget &gt; <a href="#">SSO tab</a>.</p> <p>You can create custom indexes on the database to improve performance without the need of a database specialist.</p> <p>See <a href="#">Configuring database indexes</a>.</p>

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## General

### 2. General

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Question	Answer
<b>General</b>	<p>What can I do if an end user experiences unusual, non-reproducible behavior?</p> <p>User settings can become corrupted and can cause the application to behave in an unusual manner. You can resolve this by using the <b>Clear user screen settings</b> action.</p> <p>Clearing the user screen settings affects:</p> <ul style="list-style-type: none"> <li>• The order of gadgets (in Planon ProCenter).</li> <li>• The adjustment/alignment of columns.</li> <li>• The position of pop-ups.</li> <li>• The last used user filter.</li> </ul>

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Question	Answer
What does the Code mean after an error message I get?	<p>The next time the user logs on, their user settings will be reset.</p>
See: <a href="#">Clearing the user screen settings</a> .	<p>In the Planon application, whenever there is any Error or Warning Message to be displayed, it is always displayed in below format:</p>
What is the difference between a String and an Extended string?	<ul style="list-style-type: none"> <li>• Type of message (error/warning/ confirmation/ info)</li> <li>◦ Error Context (representing the Context in which the message is being displayed).</li> <li>◦ Error or Warning Message.</li> </ul>
Which Languages does Planon support?	<p>An Extended string field with more than 2000 characters cannot be used for:</p>
When I import another language from the Planon language pack, there are still many missing translations. How is this possible?	<ul style="list-style-type: none"> <li>• Conditional filters</li> <li>• Authorization</li> <li>• Step filters</li> </ul>
Planon provides a set of languages, but it is possible for customers to add additional languages if necessary.	<p>For a list of available languages, see <a href="#">Supported Configurations</a>.</p>
	<p>That is explained by the fact that the Planon application distinguishes between <i>system translations</i> and <i>configuration translations</i>.</p>
Loading a language file only imports the system translations - which explains the gap.	<p>See <a href="#">Translations</a> for a description of and more information about configuration translations.</p>

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Question	Answer
What is an approved message?	Approved messages is functionality that allows you to provide a default answer (Yes/No) to a specific question so that this message will be skipped and the subsequent action will be performed.  See <a href="#">Approved messages</a> .
How do I stop user access to the Planon application?	The Planon administrator can block end user access when configuring or maintaining the application.  See <a href="#">Stop end user access (System Settings)</a>
Where can I set the password strength?	The Planon Application manager can specify various password settings in order to comply with the security requirements set by your company.  See <a href="#">Password settings</a> .
How can I add a visitor to a reservation?	You can add a visitor by linking them to a reservation.  See <a href="#">Adding visitors to a reservation</a> .
Where do I specify the number of elements shown?	You can manage the number of items displayed in the elements list by configuring the <b>Max. number of records shown</b> .  See <a href="#">Specifying the maximum number of records shown</a> .
Where can I see the consumption of odata?	When working with the datalake, the data usage costs of customers is incurred by the number of MBs 'consumed'.  You can check this at <b>License usage</b> level.  See <a href="#">Viewing the data usage</a> .
Why do my outbound messages remain queued?	When working with Event Connector, you require a specific account for processing outbound messages.  See <a href="#">Requirements</a> .

## Resource planner

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Question	Answer
Where can I see order details in Resource Planner?	With the correct license and configuration it is possible to view order details on a separate slide-out panel in Resource Planner.  See <a href="#">Viewing order details on slide-out panel</a> .
How can I find a person with the right skills / certificates for the job?	You can filter resources by skills and certificates.  See <a href="#">Filtering resources by skills and certificates</a> .
What is the meaning of the colors in Resource Planner?	This is explained in the <a href="#">Resource planner's color legend</a> .
How do I add leaves and holidays, training in Resource planner?	In Resource planner it is possible to mark the temporary unavailability of resources (team members) due to illness, training, holidays, special leave and so on.  See <a href="#">Adding temporary unavailability of resources on the planboard</a> .

## Authorization

Why do I need user groups for linking users to a function profile.	A user group is an important and powerful concept in arranging access to data or functionality.  See <a href="#">Authorization</a> .
How do I prevent users from seeing specific data?	There are various ways to go about that. You could: <ul style="list-style-type: none"> <li>• <a href="#">Create an authorization filter</a>.</li> <li>• <a href="#">Separate data access</a>.</li> </ul>

## Enterprise Talk - Data onboarding - SDI Configuration

Why do I get a time-out when importing data?	Likely your data set is too large to import. By decreasing the fetch size, you can cut up the data set in sizeable chunks.  See <a href="#">Using chunks to prevent a transaction time-out</a> .
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Question	Answer
What separator do I use when importing Excel files?	The decimal separator is a period (.), this is an XML standard.  For more pointers, see <a href="#">Restrictions for importing/exporting data</a> .
Why does my Excel validation fail?	When it comes to values, Excel stores amount values differently than may be expected.  There is a simple workaround, see <a href="#">Amount fields in Excel</a> .
Why can I not create single assets using data onboarding?	If the asset is of type 'simple' and you are only importing properties and spaces and no other fields from location assignment, you can define the space and property on the asset itself and do not need to specify location assignments.  See <a href="#">Importing assets and asset locations</a> .
Why can I not import asset locations?	That is because Asset locations is one of the business objects that cannot be imported using SDI or Enterprise Talk.  See <a href="#">Restrictions for importing/exporting data</a> .
How do I import workspaces?	You need to make sure that the workspace details are included.  See <a href="#">Importing workspaces</a> .
<b>Installation</b>	
How do I install a hotfix?	A hotfix is identified by a specific release number (for example: 43.0.0.2, where the last digit indicates the number of hotfix issues for a specific release).  On-premise customers can download the latest service pack from the <a href="#">Customer portal</a> .
How do I change the oracle version without running the installer?	It is possible to manually update the driver. But keep in mind that this is a manual change.  See <a href="#">Changing the Oracle driver</a> .

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Question	Answer
Why do I get Oracle driver errors during startup?	You are not using the correct driver, but you can update it by running the installer.
See <a href="#">Changing the Oracle driver</a> .	
How do I turn on SQL logging?	If you would like to get more detailed information about events, you can turn on logging.
See <a href="#">Configuring the application server logging</a> .	
Lease accounting	
Which accounting standards are supported by Planon?	Planon supports a number of accounting standards based on the following general standards: GASB, FASB and IFRS.
See <a href="#">lease accounting</a> .	
Is it possible to see postings for contract lines removed with <b>Delete after closure</b> ?	When you delete a posting, a snapshot record is created.
See <a href="#">Deleting closed lease contract lines</a> .	
Which events are logged for lease accounting?	Planon provides an overview to help understand which postings are created based on which event and also for auditing reasons. These events are registered at the <a href="#">Financial event registration</a> step.
See <a href="#">Financial event registration</a> .	
What types of postings are generated?	There is a great number of posting types, for an overview see <a href="#">Posting types</a> .
See <a href="#">Posting types</a> .	
What happens if you set an option to <b>Reasonably certain</b> ?	A renewal option can affect the calculations on an (active) lease contract. Similarly, any change in the renewal option data, for example modifying the period or changing the type from 'reasonably certain' to 'not reasonably certain', will trigger a remeasurement on the contract line.
See also <a href="#">Renewal options on lease contracts</a> or <a href="#">Special features for contract options</a> .	

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Question	Answer
What exactly is headlease / sublease and how do you register this in Planon?	When a lessee leases an asset to a third party, this is called a sublease. A headlease is an agreement in which a lessee leases an asset from the lessor and then subleases the asset to one or more other lessees. See also <a href="#">Registering a sublease</a> .
How does an impairment (reversal) work?	Over time, the value of leased assets or properties can decrease or increase due to market developments. To correct the depreciation record, you can perform an impairment. See <a href="#">Performing an impairment</a> .
<b>Work Orders</b>	
Where are the documents (added to an order) attached?	In Work Orders, documents are linked via communication logs. To see which orders have documents linked, you can click <a href="#">Show where documents are attached</a> .
How can I create an SLA for an order?	In Work Orders, you create an order / request and select an SLA service. See <a href="#">Applying SLAs to requests/orders</a> .
<b>Spaces &amp; Workspaces</b>	
What is the procedure to make fixed workspaces bookable?	To make fixed workspaces bookable, you must first generate a QR code for the space. See <a href="#">Generating QR codes for fixed workspaces</a> .
Where can I find the history of a space?	The history of spaces is captured in <a href="#">History fields</a> .
How can I resume an ended space?	You can temporarily 'deactivate' a space by ending the space and resuming it at a future date. See <a href="#">Deactivating a space temporarily</a> .
How can I adjust my space size?	You can adjust the space size at the <b>Space details</b> selection level > <b>Space dimensions</b> selection step.

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Question	Answer
How can I add a Tariff group to a space?	See <a href="#">Working with space dimensions</a> .
Can I define my own space mapping?	You can link a tariff group to a space usage for the purpose of charging costs to a particular department/cost center.
How do I assign an employee to a workspace?	See <a href="#">Working with tariff groups</a> .
How do I assign an employee to a workspace?	Yes, it is possible to create a user-defined space mapping.
Can I define my own space mapping?	See <a href="#">Creating a user-defined space mapping</a> .
How exactly does module licensing work?	You can do so by adding the occupant of a space.
How exactly does module licensing work?	See <a href="#">Working with occupancies</a> .
AppSuite	In this example you have seven property sets in your system, but you have 0 in your license.
How can I add notes or documents to the AppSuite?	You can keep using your current property sets without limitation. Only if you would want to add a new one, you would have to get this licensed.
AppSuite	In that case it is best to contact your account manager.
How can I add notes or documents to the AppSuite?	The various licensing types are explained in <a href="#">Licensing</a> .
AppSuite	To answer this specific question, see <a href="#">Module licensing</a> .
How can I add notes or documents to the AppSuite?	In order to share documents, photos and other files with the field engineers using <b>Planon AppSuite</b> , you can configure communication logs on relevant business objects, such as <i>Planned maintenance orders</i> , <i>Reactive orders</i> , <i>Assets</i> and so on.
AppSuite	For more information, see <a href="#">Configuring communication logs for file sharing</a> .

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Question	Answer
How do I add sub orders to an existing order within AppSuite.	When working on a job, you may find a related issue for which you want to create separate task. In that case you can add a sub. This new job can be picked up directly by you, or you can send it to the back-office for replanning.  See <a href="#">Adding a sub to a job in progress</a> .
Where in Planon can I check the if there are error messages for any of the AppSuite jobs?	You can see this in the <b>AppSuite inbox</b> in <b>Background actions</b> . This is an overview of all app actions sent from the mobile devices of field engineers to the back-office. In the <b>AppSuite inbox</b> , you can monitor and assess the various background actions.  See <a href="#">Working with the AppSuite inbox</a> .
Why can I not get a list of available materials when using the <b>Add new materials</b> button?	When starting a job, the <b>Materials</b> block will display the materials anticipated for the job, in quantities planned by the back-office. However, you might need more.  See <a href="#">Unplanned materials</a> .
Why is the order not updated in the back-office?	This could be because there is a synchronization issue - please see <a href="#">Monitoring and processing AppSuite synchronization issues</a> .
How do I configure reasons for checklists in AppSuite?	Field engineers must record a result for checklist items on the app in order to complete their activity. Checklist results can be linked to reasons as described in <a href="#">Linking reasons to checklist results</a> .
<b>Maintenance</b>	
How do I prevent generating weekly and monthly orders for the same maintenance activity definition?	You can do so by overruling an activity definition.  See <a href="#">Overruling activity definition</a> .
How can I regenerate orders already created if information has changed?	That is not possible, you can cancel the maintenance order and generate a new one.  See: <a href="#">Canceling an activity</a> .

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Question	Answer
I would like to automate the generation of PPM Orders, is that possible?	Yes, this is possible. See, <a href="#">Scheduling automatic generation of maintenance orders</a> .
What is the difference between <i>generating orders</i> and <i>generating clustered orders</i> ?	By clustering orders, you can generate a limited number of maintenance orders for related maintenance activities, instead of generating one maintenance order per maintenance activity.
How can I generate PPM/maintenance orders?	You can generate a PPM / maintenance order for each recurring or non-recurring activity of an activity definition.  See <a href="#">Generating maintenance orders</a> .
How can I define predictive maintenance based on meter readings?	For predictive-based maintenance, you need a certain threshold and a counter with counter readings to be able to calculate the next needed maintenance date.  See <a href="#">Predictive-based</a> .

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## Self-Service

### 3. Self-Service

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Question	Answer
How can I link a questionnaire to my form?	On the main level of a form definition, you can link a questionnaire on the <b>Questionnaire</b> tab.
Why do I get a "No 'Workflow details' definition available' error in my Workflow definition?	A details page for the appropriate order UDBO has not been created or the <b>allowed statuses</b> are not added on the Workflow details page.
Where can I add CSS to my forms/site?	At the right top on any random Web configuration module, you can open the Site definitions and Edit the site. There you can add/modify CSS.  Note that CSS is a customization that is not supported by our Planon Support.

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Question	Answer
How does Dynamic behavior work in Service request forms?	See also: <a href="#">Changing the styling of a web form</a> .
How can I create gadgets and add Services definitions to the Start page?	See: <a href="#">Making forms dynamic</a> .
What is the difference between a Publisher expander and a Details page?	An expander will show data directly on the list. A details page opens a new page on which it details of the record are shown.
How can I create a CAD viewer selector?	See: <a href="#">Adding a selector</a> .
Why can't I open certain definitions 'stand-alone'?	Some forms cannot run standalone because they needs to be connected to a navigation item or a List page first.
How do I configure chart queries?	You can configure or customize chart queries as described in <a href="#">Chart page configuration</a> .
How does hitcount licensing work for Self-Service?	In Self-Service, typically licensing is based on the number of hits. This works differently per module, as explained in <a href="#">Licensing</a> .

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