



Frequently Asked Questions

Planon Software Suite

Version: L126

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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.

Table of Contents

Frequently asked questions.....5

 Cloud.....5

 General..... 9

 Self-Service..... 18

Index.....20

Frequently asked questions


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


The topics in this section are arranged by subject:


- [Cloud](#)
- [General](#)
 - [Resource planner](#)
 - [Authorization](#)
 - [Enterprise Talk, SDI, Data onboarding](#)
 - [Installation](#)
 - [Lease accounting](#)
 - [Work orders](#)
 - [Spaces & Workspaces](#)
 - [Licensing](#)
 - [AppSuite](#)
 - [Maintenance](#)
- [Self-Service](#)

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: Cloud maintenance (Customer portal).</p> <div> You need credentials to log in to the customer portal.</div>
Can I give the Cloud admin an end date?	No, you cannot do this account.

Question	Answer
	<p>The Cloud admin user is needed to communicate between the Cloud backend systems.</p> <p>See also: System accounts (Accounts).</p>
How can I request a PEN test in the Planon Cloud?	<p>See Security assessments (Customer portal).</p> <div>  You need credentials to log in to the customer portal. </div>
Can Planon Support reset my users account password?	<p>No, Planon Support does not have access to your Cloud environment.</p>
Email sent by my Cloud environment are not being received by the recipient?	<p>We recommend configuring SPF email authentication - for more information/instructions see Emailing in the Cloud.</p>
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 Cloud backups.</p>
How do I configure a custom domain name for my Cloud environment?	<p>From the Environment management gadget you can configure a custom URL, please follow the steps in Custom URLs and certificates.</p>
How do I enable IP whitelisting in my Cloud environment?	<p>IP Whitelisting is a premium service that Planon offers. To enable this you need a additional license in your environment.</p> <p>To configure a whitelist please follow the steps described in IP whitelisting.</p>
My Cloud environment is down outside office hours, how do I receive help?	<p>Planon offers a 24/7 service for Cloud production standstills:</p> <ol style="list-style-type: none"> 1. Please dial the telephone number listed on the customer portal > Cloud

Question	Answer
	<p>> Cloud Maintenance (credentials required).</p> <ol style="list-style-type: none"> Stay on the line until the message is finished. Outside office hours, the call will be transferred to an emergency number.
How do I install a hotfix?	<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 Customer portal.</p>
How do I restart the Planon Cloud environment?	<div data-bbox="773 945 1328 1035">  You need credentials to log in to the customer portal. </div> <ol style="list-style-type: none"> Go to Home Go to Environment management gadget Select Danger zone Click on Restart Wait for your environment to restart. (Generally, this takes up to 10 minutes).
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>Procedure</p> <ol style="list-style-type: none"> Log in to the Planon Cloud environment that you want to download. (If you log in to your Production

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

Question	Answer
	<p>be obtained and administered via the Environment management gadget.</p> <p>On initial setup, these credentials must be reset before first use.</p> <div>  <p>Please save the credentials securely since after resetting they are no longer retrievable.</p> </div>
How do I configure SSO?	For the Cloud, Single Sign On (SSO) can be configured in Environment management gadget > SSO tab .
How do I create an index in the Cloud	<p>You can create custom indexes on the database to improve performance without the need of a database specialist.</p> <p>See Configuring database indexes.</p>

General

2. General

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

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

Question	Answer
What is an approved message?	<p>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.</p> <p>See Approved messages.</p>
How do I stop user access to the Planon application?	<p>The Planon administrator can block end user access when configuring or maintaining the application.</p> <p>See Stop end user access (System Settings)</p>
Where can I set the password strength?	<p>The Planon Application manager can specify various password settings in order to comply with the security requirements set by your company.</p> <p>See Password settings.</p>
How can I add a visitor to a reservation?	<p>You can add a visitor by linking them to a reservation.</p> <p>See Adding visitors to a reservation.</p>
Where do I specify the number of elements shown?	<p>You can manage the number of items displayed in the elements list by configuring the Max. number of records shown.</p> <p>See Specifying the maximum number of records shown.</p>
Where can I see the consumption of odata?	<p>When working with the datalake, the data usage costs of customers is incurred by the number of MBs 'consumed'.</p> <p>You can check this at License usage level.</p> <p>See Viewing the data usage.</p>
Why do my outbound messages remain queued?	<p>When working with Event Connector, you require a specific account for processing outbound messages.</p> <p>See Requirements.</p>
Resource planner	

Question	Answer
Where can I see order details in Resource Planner?	<p>With the correct license and configuration it is possible to view order details on a separate slide-out panel in Resource Planner.</p> <p>See Viewing order details on slide-out panel.</p>
How can I find a person with the right skills / certificates for the job?	<p>You can filter resources by skills and certificates.</p> <p>See Filtering resources by skills and certificates.</p>
What is the meaning of the colors in Resource Planner?	<p>This is explained in the Resource planner's color legend.</p>
How do I add leaves and holidays, training in Resource planner?	<p>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.</p> <p>See Adding temporary unavailability of resources on the planboard.</p>
Authorization	
Why do I need user groups for linking users to a function profile.	<p>A user group is an important and powerful concept in arranging access to data or functionality.</p> <p>See Authorization.</p>
How do I prevent users from seeing specific data?	<p>There are various ways to go about that. You could:</p> <ul style="list-style-type: none"> • Create an authorization filter. • Separate data access.
Enterprise Talk - Data onboarding - SDI Configuration	
Why do I get a time-out when importing data?	<p>Likely your data set is too large to import. By decreasing the fetch size, you can cut up the data set in sizeable chunks.</p> <p>See Using chunks to prevent a transaction time-out.</p>

Question	Answer
What separator do I use when importing Excel files?	<p>The decimal separator is a period (.), this is an XML standard.</p> <p>For more pointers, see Restrictions for importing/exporting data.</p>
Why does my Excel validation fail?	<p>When it comes to values, Excel stores amount values differently than may be expected.</p> <p>There is a simple workaround, see Amount fields in Excel.</p>
Why can I not create single assets using data onboarding?	<p>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.</p> <p>See Importing assets and asset locations.</p>
Why can I not import asset locations?	<p>That is because Asset locations is one of the business objects that cannot be imported using SDI or Enterprise Talk.</p> <p>See Restrictions for importing/exporting data.</p>
How do I import workspaces?	<p>You need to make sure that the workspace details are included.</p> <p>See Importing workspaces.</p>
Installation	
How do I install a hotfix?	<p>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).</p> <p>On-premise customers can download the latest service pack from the Customer portal.</p>
How do I change the oracle version without running the installer?	<p>It is possible to manually update the driver. But keep in mind that this is a manual change.</p> <p>See Changing the Oracle driver.</p>

Question

Why do I get Oracle driver errors during startup?

How do I turn on SQL logging?

Lease accounting

Which accounting standards are supported by Planon?

Is it possible to see postings for contract lines removed with **Delete after closure**?

Which events are logged for lease accounting?

What types of postings are generated?

What happens if you set an option to **Reasonably certain**?

Answer

You are not using the correct driver, but you can update it by running the installer.

See [Changing the Oracle driver](#).

If you would like to get more detailed information about events, you can turn on logging.

See [Configuring the application server logging](#).

Planon supports a number of accounting standards based on the following general standards: GASB, FASB and IFRS.

See [lease accounting](#).

When you delete a posting, a snapshot record is created.

See [Deleting closed lease contract lines](#).

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 [Financial event registration](#) step.

There is a great number of posting types, for an overview see [Posting types](#).

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 [Renewal options on lease contracts](#) or [Special features for contract options](#).

Question

What exactly is headlease / sublease and how do you register this in Planon?

How does an impairment (reversal) work?

Work Orders

Where are the documents (added to an order) attached?

How can I create an SLA for an order?

Spaces & Workspaces

What is the procedure to make fixed workspaces bookable ?

Where can I find the history of a space?

How can I resume an ended space?

How can I adjust my space size?

Answer

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 [Registering a sublease](#).

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 [Performing an impairment](#).

In Work Orders , documents are linked via communication logs. To see which orders have documents linked, you can click [Show where documents are attached](#).

In Work Orders , you create an order / request and select an SLA service.

See [Applying SLAs to requests/orders](#).

To make fixed workspaces bookable, you must first generate a QR code for the space.

See [Generating QR codes for fixed workspaces](#).

The history of spaces is captured in [History fields](#).

You can temporarily 'deactivate' a space by ending the space and resuming it at a future date.

See [Deactivating a space temporarily](#).

You can adjust the space size at the **Space details** selection level > **Space dimensions** selection step.

Question	Answer
How can I add a Tariff group to a space?	<p>See Working with space dimensions.</p> <p>You can link a tariff group to a space usage for the purpose of charging costs to a particular department/cost center.</p> <p>See Working with tariff groups.</p>
Can I define my own space mapping?	<p>Yes, it is possible to create a user-defined space mapping.</p> <p>See Creating a user-defined space mapping.</p>
How do I assign an employee to a workspace?	<p>You can do so by adding the occupant of a space.</p> <p>See Working with occupancies.</p>
Licensing	
<p>When loading a license, we get the following error:</p> <p>The E00850 volume (7) in the system exceeds the volume (0) in your volume license. (PN_H01182)</p>	<p>In this example you have seven property sets in your system, but you have 0 in your license.</p> <p>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.</p> <p>In that case it is best to contact your account manager.</p>
How exactly does module licensing work?	<p>The various licensing types are explained in Licensing.</p> <p>To answer this specific question, see Module licensing.</p>
AppSuite	
How can I add notes or documents to the AppSuite?	<p>In order to share documents, photos and other files with the field engineers using Planon AppSuite, 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.</p> <p>For more information, see Configuring communication logs for file sharing.</p>

Question

How do I add sub orders to an existing order within AppSuite.

Where in Planon can I check the if there are error messages for any of the AppSuite jobs?

Why can I not get a list of available materials when using the **Add new materials** button?

Why is the order not updated in the back-office?

How do I configure reasons for checklists in AppSuite?

Maintenance

How do I prevent generating weekly and monthly orders for the same maintenance activity definition?

How can I regenerate orders already created if information has changed?

Answer

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 [Adding a sub to a job in progress](#).

You can see this in the **AppSuite inbox** in **Background actions**. This is an overview of all app actions sent from the mobile devices of field engineers to the back-office. In the **AppSuite inbox**, you can monitor and assess the various background actions.

See [Working with the AppSuite inbox](#).

When starting a job, the **Materials** block will display the materials anticipated for the job, in quantities planned by the back-office. However, you might need more.

See [Unplanned materials](#).

This could be because there is a synchronization issue - please see [Monitoring and processing AppSuite synchronization issues](#).

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 [Linking reasons to checklist results](#).

You can do so by overruling an activity definition.

See [Overruling activity definition](#).

That is not possible, you can cancel the maintenance order and generate a new one.

See: [Canceling an activity](#).

Question	Answer
I would like to automate the generation of PPM Orders, is that possible?	Yes, this is possible. See, Scheduling automatic generation of maintenance orders .
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 Generating maintenance orders .
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 Predictive-based .

Self-Service

3. Self-Service

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 Questionnaire 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 <i>allowed statuses</i> 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.

Question	Answer
How does Dynamic behavior work in Service request forms?	<p>See also: Changing the styling of a web form.</p> <p>See: Making forms dynamic.</p>
How can I create gadgets and add Services definitions to the Start page?	See: Adding a web definition in Services .
What is the difference between a Publisher expander and a Details page?	<p>An expander will show data directly on the list.</p> <p>A details page opens a new page on which it details of the record are shown.</p>
How can I create a CAD viewer selector?	See: Adding a selector .
Why can't I open certain definitions 'stand-alone'?	Some forms cannot run standalone because they need 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 Chart page configuration .
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 Licensing .

Index

F

FAQ 5, 5, 9, 18

Frequently asked questions 5

Cloud 5

General 9

Self-Service 18