



# Migration to Activity Planner

Planon Software Suite

Version: L129

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# About this Document

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## 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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# Introduction

## About this document

This guide provides step-by-step instructions for migrating from **Maintenance planner** to **Activity planner** in Planon.

For more information about the key differences between the previous and new approaches, and for guidance on setting up planned maintenance and naming conventions, see [Activity planner compared to the Maintenance planner](#).

## Purpose and context

- The **Maintenance planner** and the **Maintenance library** in Planon ProCenter will be **replaced** by:
  - [Activity planner](#).
  - [Activity library](#).
  - A separate [Activity order generation](#) (PPM order generation) TSI.
- To support this transition, migration tooling is available to move existing Maintenance planner data to the new Activity-based setup.

## Why migration is required

All organizations currently using the **Maintenance Planner** in Planon ProCenter must migrate. The existing **Maintenance Planner** and its **Maintenance library** reach end of life on October 1, 2027 (L146).

## Removed or changed functionality in Activity planner

### Condition-based planning

- The following parameters are no longer supported:
  - Minimum required condition.
  - Minimum gap between activities.
- The **Condition-based worker** supports only deterioration periods defined in months or years.

Deterioration periods defined in weeks are not supported.

**Activity Definition Costs**

- The following cost parameters are no longer available:
  - Produced quantity.
  - Percentage to be completed.
- After migration, costs are defined per unit.
- Due to rounding, calculated costs may differ after migration, particularly when large quantities are involved.

# Scope of migration

The following topics **will be migrated**. The name in brackets indicates the system entry name of the new TSI:

- **Maintenance libraries:** All standard service plans and Standard Maintenance Activity Definitions (SMADs) are migrated to the new standard service plans and Standard Activity Definitions (SADs) in the Activity library (`ActivityLibrary`).
- **Maintenance plans:** All maintenance plans, including Maintenance Activity Definitions and related details (such as dates and costs), are migrated to Activity Plans with Activity Definitions (ADs) and their details in the Activity planner (`ActivityManagement`). Only active maintenance plans are migrated. For condition-based maintenance activity definitions, the latest condition score is migrated as an aggregated topic score for the relevant asset.



Only property-based plans can be migrated. Migration of contract-based plans will be available in a later release.

- **Maintenance activities:** All maintenance activities scheduled after the migration date are unlinked from the Maintenance Activity Definition and linked to the corresponding Activity Definition.
- **PPM profiles** will be migrated to activity order generation (`PPMOrderGeneration`).

## What happens after migration?

After a maintenance plan is migrated:

- Compiling is disabled for the migrated plan.
- The end date of maintenance activity definitions is read-only.
- It is no longer possible to add new Maintenance activity definitions to the migrated plan.

### Not included or impacted in this migration:

The following items are not included or impacted:

- Custom-developed functionalities, such as apps outside the Maintenance planner or Maintenance library, unless explicitly identified.
- Archived maintenance activity definitions.

# Summary of migration process

This topic describes the overall migration process from the **Maintenance planner** and **Maintenance library** to the **Activity planner**, **Activity library**, and **Activity order generation** (PPM) TSI.

For more information, see:

- [Licenses and configuration for migration.](#)
- [Required tasks before migration.](#)

The migration consists of preparation, execution, and post-migration activities.

## Preparation

Before starting the migration:

- Ensure that all required licences are available.
- Configure all required TSIs and business objects.

## Executing the migration

### Procedure

1. Open the Maintenance planner.
2. Enter the Migration date.

The migration can be started with the **Migrate to activity planner** action on the **Maintenance plan** level of the maintenance planner. For more information, see [Perform the migration](#).

3. Check the migration results.

After migration, the results can be checked in the **Log viewer** TSI and via the Migration report. For more information, see [Checking migration results](#).

If required, the migration can be restarted, for example after correcting data or recovering from an unexpected failure.

# New features in Activity planner

In the **Activity planner**, planned work is managed with a focus on the life cycles of maintenance objects. Key new features include:

- **Direct creation of activity definitions**, including detailed information, for properties, spaces, assets, or rentable units. Planned activities and associated costs are visible without compiling the plan.
- **Centralised data storage**: All data including costs and planned activities, is stored in the database and available for export and BI reporting.
- **Time-aware data**: Activity costs, schedules, and checklist items are time-aware
- **Single activity business object**: Activities use a single business object type, the Activity definition (AD), with the option to reference contract lines where applicable.
- Activities use a single business object type, the **Activity definition** (AD), with the option to reference contract lines where applicable.
- **Activity workers** supporting optional business rules, such as calculating or shifting start dates, and enabling condition-based and predictive maintenance.
- **Activity planboard** is divided into two clear views:
  - **Work plan**: Displays planned activities, with execution details and costs, including monthly cost aggregation..
  - **Financial plan**: Displays costs aggregated per activity per year, supporting long-term planning of up to 50 years.
- **Scopes** to automatically add activities from the activity library based on defined criteria.
- **Cost indexation** to support expected future cost adjustments.

For more information, see [Activity planner](#).

## Adding activities

To simplify the setup of activity plans, multiple methods are available to add activities:

- **Wizard**: Select standard activity definitions directly from the activity library.
- **Standard assets**: Activities related to an asset are added automatically when the asset is created.

- **Manual creation:** Entering the code of a standard activity definition automatically adds the corresponding activity definition.
- **Scopes:** Activities are added automatically based on defined criteria.
- **Observations:** Activities created based on follow-up actions.
- **Import and export tooling:** Activities can be added and maintained using import and export functionality.

## Activity order generation (PPM order generation)

- Order generation via profiles is available in a dedicated TSI.
- Activity-based orders can be generated for recurring and non-recurring activities.
- The linked standard order serves as a template for generated orders.
- When generating clustered orders, the system uses the start and end dates of the activity definition as the authoritative time frame.

## Activity library

The **Activity library** contains Standard Activity Definitions (SADs), which act as templates for creating activity definitions for one or more objects.

SADs replace the Standard Maintenance Activity Definitions (SMADs) from the legacy Maintenance library.

For more information, see [Activity library](#).

# Licenses and configuration for migration

## Licensing requirements

### Mandatory licenses

The following licenses are required to access Activity management functionality:

- Activity planner
- Activity Library
- Condition-based worker
- Predictive-based worker
- Migration maintenance planner to Activity planner

### Optional licenses (Paid upsell)

The following licenses are optional and are **not included** in the free migration:

- Activity scopes
- Activity snapshot
- Activity scenario (*not released yet*)

Migration from Maintenance management to Activity management is free of charge.



New Activity scopes and Activity snapshot functionality require an additional license. Contact your account manager to obtain the appropriate *license package*.

## Authorization and user context

- The target environment must be upgraded to L129 or later.
- Licenses are temporarily assigned to the `SchedulerEngineAdmin` user to run the migration tool.
- The user executing the migration must have a function profile with full authorisation for Activity management (OBM).

## Required system configurations

Configure the required Activity management business objects and TSIs using the provided configuration packages. After applying the default configuration, tailor the setup to your business requirements.

## Enable translations

Enable user translation on the following business objects to ensure translations are migrated.

- Standard activity definitions
- Activity definitions
- Standard activity costs
- Activity costs
- Standard checklist items
- Checklist items

## User defined free fields

All **In Use** user-defined free fields must be configured identically across Maintenance planner and Activity planner business objects.

Maintenance planner BO	Activity planner BO
StandardMaintenanceActivityDefinition	StandardActivityDefinition
MaintenanceActivityDefinition	ActivityDefinitions (Base) and related system- and UDBOs
MaintenanceChecklistItems	Standard Checklist items, Checklist items
BaseMaintenanceActivityDefinitionCosts and subtypes	BaseActivityCost and subtypes
<ul style="list-style-type: none"> <li>• MaintenanceActivityDefinitionManHourCosts</li> <li>• MaintenanceActivityDefinitionMaterialCosts</li> <li>• MaintenanceActivityDefinitionAdditionalCosts</li> </ul>	<ul style="list-style-type: none"> <li>• ManhourActivityCost</li> <li>• MaterialActivityCost</li> <li>• GeneralActivityCost</li> </ul>

Some fields from the Maintenance planner are not available in the Activity planner data model.

The following fields are **not implemented** in the new BOs (*StandardActivityDefinition* and *ActivityDefinition*):

- Inspectionregime

- Functionalityclass
- Worktype
- FreeMaintenance2

If these fields are not used, set **In use** to *No* for these fields on:


- StandardMaintenanceActivityDefinition
- MaintenanceActivityDefinition

If these fields are currently used, or historical values must be retained:

- Configure corresponding **Free Fields** in:
  - StandardActivityDefinition.
  - BaseActivityDefinition (including subtypes).
- Map each field according to the defined configuration table.

DB Name	User name (optional)	Field type	Picklist - code
<i>FREEStringA</i>	Inspectionregime	CodesCodeName	ASPECT
<i>FREEStringB</i>	FreeMaintenance2	CodesCodeName	VRIJECODE2
<i>FREEStringC</i>	Functionalityclass	CodesCodeName	FUNCTIONALITYCLASS
<i>FREEStringD</i>	Worktype	CodesCodeName	WERKSOORT

- Any **FreeString field** can be used.
- Ensure that all **In Use User Free Fields** are configured identically across relevant BOs.

 If these fields are not configured correctly, errors are reported in the **migration log**.

Configure all **In Use** user-defined free fields from **Base Maintenance Activity Definition** identically on the following business objects:

- Standard Activity Definition
- Activity Definition

## TSI configuration: Migrate to Activity plan step action

1. Go to the **TSIs** navigation group.
2. Select the **Maintenance planner TSI**.
3. Open the **Maintenance pans** step.

4. Go to **Step settings**.
5. Add the **Migrate to activity plan step** action.

Linked step actions ×

Field: Active? Operator: = Value:  Yes  No  None ✕ ✕ + 🔍


Available			In use		
Label	Partner identifier	App module	Label	Partner identifier	
Nothing found			<input checked="" type="checkbox"/>	MigrateToActivityPlanStepMethod	

For understanding, see this [demo](#).

# Required tasks before migration

Before executing the migration, complete the following tasks:

Action	Remarks	Instructions
Close or end maintenance plans that need not be migrated.	Plans with an end date before the migration date and with a status <b>Closed</b> are not migrated.	In the <b>Maintenance Planner</b> TSI, ensure that any plan that must not be migrated is set to <b>Closed</b> or has an end date earlier than the migration date.
PPM Profiles	PPM order generation should not run during migration	In the <b>Maintenance Planner</b> TSI, stop all scheduled profiles.
Postpone scheduled tasks for order generation	Orders generated during the migration may not be migrated. Generating new planned activities during migration can interfere with the migration process.	<p>In the <b>Scheduled Tasks</b> TSI, disable the following scheduled task(s):</p> <ul style="list-style-type: none"> <li>• sysppm_scheduled_profiles (order generation from maintenance planner)</li> <li>• sys_activity_ppm_profiles (order generation from activity planner)</li> <li>• sys_generate_plannedactivities</li> </ul> <p>A task can be postponed by changing the schedule. Example; change the schedule to '1 month'.</p>
Postpone schedule for	The migration creates log	<p>Write down the original value, to be able to update to the original value after migration.</p> <p>In the TSI Scheduled tasks change</p>

Action	Remarks	Instructions
scheduled cleaning tasks SYSEVENTLOG_CLEANER and SYSBACKGROUND_ACTION_CLEANER	messages in the event log and triggers background actions. It is recommended to temporarily prevent cleaning of these business objects until the migration is fully executed and the migration log is downloaded.	the schedule of SYSEVENTLOG_CLEANER and SYSBACKGROUND_ACTION_CLEANER, so that is not executed until after migration is finished. Example; change the schedule to '1 month'.
Disable TMS	Consider disabling any TMS that creates or changes Maintenance activity definitions or PPM orders.	<div style="border: 1px solid black; padding: 5px;">  Write down the original value, to be able to update to the original value after migration.         </div>
Postpone active synchronization with the data lake	To optimize performance and prevent unnecessary synchronization during migration, pause the connection to the data lake temporarily. Restart synchronization after migration to synchronize all new activities and details.	
Create a backup	After configuring AMM 3.0 and before starting the migration, create a backup.	

# Perform the migration

## Starting the migration

The migration must be executed by a user with full authorization (Supervisor). The **Migrate to activity plan** action is available in the **Maintenance plan** action panel.



For configuration details, see [TSI configuration: Migrate to Activity plan step action](#).

### Procedure

1. Open the Maintenance planner.
2. Select a Maintenance plan.
3. On the action panel, click Migrate to activity planner.

The **Migrate to activity planner** dialog box appears. Selecting **Migration start date** is mandatory.

- The selected migration date determines when planning transitions to the Activity planner.
- Migrated Maintenance activity definitions end on the day before the migration date.
- All Maintenance activities starting on or after the migration date are linked to a Planned activity in the Activity planner.



You can continue working in the **Maintenance planner** for activities scheduled before the migration date. Migrated maintenance plans and Maintenance activity definitions remain visible in the **Maintenance planner** but the following actions are no longer available for migrated data:

- Compiling Maintenance plans
- Adding new Maintenance activity definitions
- Changing the end date of migrated Maintenance activity definitions

4. Click OK.

A confirmation message appears.

- Click **OK** to start the migration.
- Click **Cancel** to cancel the migration.

After confirmation, the migration starts as a batch process.



It is **not required** to select maintenance plans manually. All maintenance plans that end in the future, and are not set to **Closed** are migrated automatically.

**Expected duration:** Based on test migrations on customer databases, the estimated migration duration is approximately 1 hour per 10,000 (standard) maintenance activity definitions. Actual duration depends on data volume and system performance.

## Monitoring the migration

The migration progress can be monitored via the **Batches** TSI.

### Procedure

1. Open the Batches TSI > Job definitions.
2. In the elements list, select MaintenanceMigration.
3. Go to Job instances selection level and select the latest Job instance.
4. Go to Step execution to view progress and status.

## Batches

Job definitions	Job instances	Job execution	Step execution
MaintenanceMigration, Migrates...	317	317	

Filter name	Step name	Batch status	Exit status
No filter			
Step execution (5)			
<input type="checkbox"/>	619 Configuration validation	COMPLETED	COMPLETED
<input type="checkbox"/>	620 Maintenance Library migration	COMPLETED	COMPLETED
<input type="checkbox"/>	621 Maintenance Plans migration	COMPLETED	COMPLETED
<input type="checkbox"/>	622 Maintenance Activities - End MADs	COMPLETED	COMPLETED
<input type="checkbox"/>	623 PPM profiles migration	COMPLETED	COMPLETED

## Migration steps

The migration batch consists of the following steps, executed sequentially.

## Step 1: Configuration validation

This step validates:

- Required licenses
- Field configuration
- Mandatory prerequisites

If validation fails, the migration stops and errors are written to the log.

## Step 2: Maintenance library migration

This step migrates data from the **Maintenance library** to the **Activity library**.

Migrated elements include:

- Standard Maintenance service plans
- Standard activity definitions
- Standard activity costs
- Standard checklist items

This step may take time. Progress can be verified in the **Activity library** TSI by monitoring the number of standard activity definitions.

## Step 3: Maintenance plans migration

This step migrates **Maintenance plans** to the **Activity planner**.

Migrated elements include:

- Activity definitions
- Planned activities
- Planning details
- Activity definition workers
- Activity costs
- Checklist items

This step may take time. Progress can be verified in the **Activity Planner** TSI by monitoring the number of activity definitions.

## Step 4: Maintenance activities – End MADs

This step:

- Relinks generated orders and maintenance activities to activity definitions.
- Updates end dates on maintenance activity definitions (MADs).

## Step 5: PPM profiles migration

This step migrates PPM profiles to the activity management structure.

# Checking migration results

## During migration

After the migration has started, progress can be monitored in the **Batches** TSI.

To verify the status of the migration batch:

1. Open **TSI Batches**.
2. Go to **Job definitions**.
3. Select **MaintenanceMigration**.
4. Go to **Job instances** and select the latest job instance.
5. Go to **Job execution** to view the batch status.
6. Go to **Step execution** to check the status of individual migration steps.

Depending on system performance and data volume, up to 10,000 activity definitions per hour can be migrated.

Progress can also be monitored functionally:

- **Activity Library TSI:** Monitor the number of **Standard activity definitions** to track library migration progress.
- **Activity Planner TSI:** Monitor the number of **Activity definitions** to track migration of maintenance activity definitions.

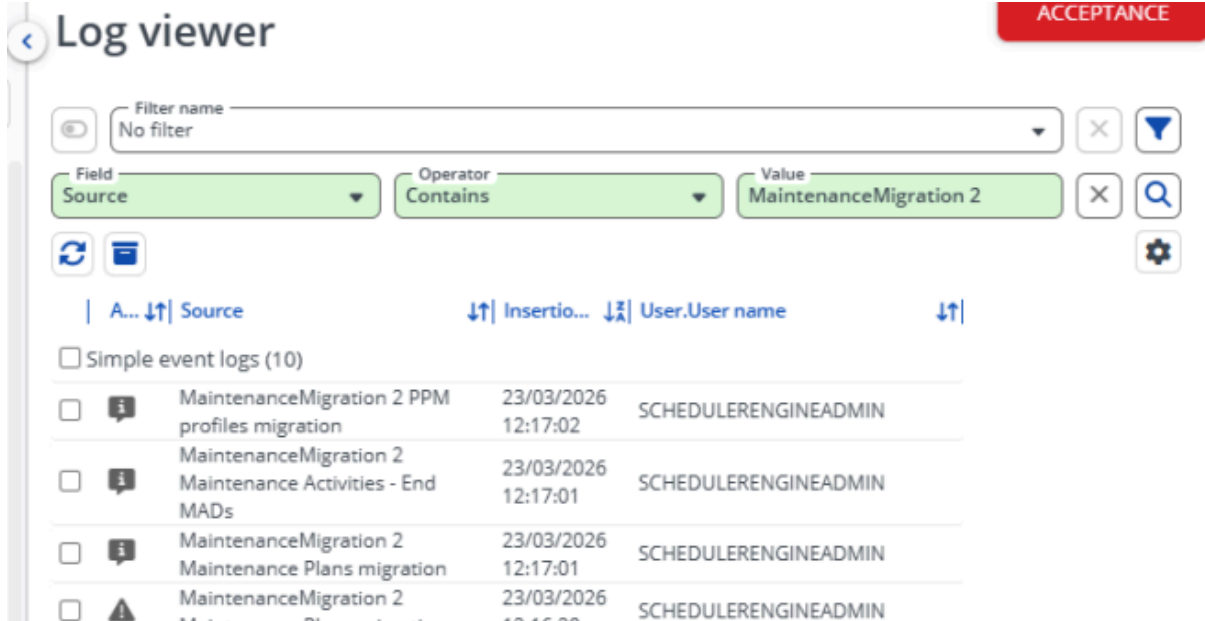
These counts provide an indication of migration progress but do not replace batch status monitoring.

## Post migration

Detailed migration information is available in the log viewer.

To review migration logs:

1. Go to **Log Viewer**.
2. Filter log messages using the **Source** field.
3. Enter the **job number** of the migration batch to view related messages.



Log messages include:

- **Information messages** for each completed migration step.
- **Warnings** indicating non-blocking issues.
- **Errors** indicating migration problems that may require corrective action. See also the list of common warnings and error in [Errors and Warnings](#).

## Checking migration failure

If the migration fails, identify the failing step using **Step execution** in the Batches TSI.

### Failure in step 1

#### Cause

- Typically related to configuration issues.

#### Resolution

- Check the log messages.
- Correct the configuration errors.
- Restart the migration.

### Failure in step 2 to 5

#### Cause

- Unexpected system error.

#### Resolution

- Raise a support ticket for further investigation.

# Errors and Warnings

## List of identified errors and warnings

This section lists the errors and warnings identified during migration testing.

---

### ✘ ACTM\_0007 Rentable unit does not match Location

**Description:** Rentable unit does not match Location. MAD is not migrated.

**Step:** 3

**Solution:** Change Location values of existing Maintenance Activity definitions (AMM 2.0) to a valid combination of property, rentable unit and asset.

### ✘ ACTM\_0008 Space does not belong to property

**Description:** Space does not belong to property. MAD is not migrated.

**Step:** 3

**Solution:** Change Space values or add Space to Property.

### ✘ ACTM\_0073 Condition based regime: weekly schedule not supported

**Description:** For activities in the Maintenance planner with the regime Condition Based (CB), weekly schedules are not supported on Planning Details of Activity definitions. Since a worker is created during migration, running it will cause this error on the Background TSI.

**Step:** 3

**Solution:** Change the schedule to monthly/yearly (on the MAD before migration) to be able to execute the newly created worker.

### ✘ ACTM\_0097 Fields are not properly configured

**Description:** Fields are not properly configured.

**Step:** 1

**Solution:** check configuration ([Preparation and Migration considerations](#)).

### ✘ ACTM\_0100 Free field with picklist not configured on the (Standard) Activity Definition

**Description:** A free field should be configured in (Standard) activity definitions for the migration of Worktype, Inspectionregime, Functionalityclass or User defined classification.

**Step:** 1

**Solution:** Configure free field picklist on the Standard activity definition and/or Activity definition.

#### ✘ ACTM\_0102 mismatch between the Property of a MAD and the Asset on it

**Description:** Property and/or Space on Maintenance activity definition do not match Property and/or Space on Asset (that is referenced on the MAD)

**Step:** 3

**Solution:** Correct the Property and or Space on either Maintenance activity definition or Asset.

#### ✘ ACTM\_0104 The user does not have the correct license to migrate

**Description:** The user does not have the correct license to initiate Migration. An appropriate license is needed. (G00505)

**Step:** 1

**Solution:** see [Preparation and Migration considerations](#).

#### ✘ ACTM\_0105 Mismatch on configuration of fields

**Description:** The configuration for field 'xx' in Activity definitions must match the configuration in Maintenance activity definitions.

**Step:** 1

**Solution:** Align the configuration of (free) fields.

#### ✘ ACTM\_0107 existing Contractual Maintenance Activity Definitions

**Description:** Migration to the Activity planner is not possible because contract-based maintenance activities exist; CMADs exist in 1 or more migratable Maintenance plans.

**Scenario Step:** 1

**Solution:** Close the Maintenance plans that contains CMADs. Migration of Contract based plans will be available in a later release. will be available by end of Q1 2026.

#### ✘ PN\_H00011 user does not have the right function profile

**Description:** The user who triggered the migration lacks the correct function profile to modify elements. Change the user or their authorizations.

**Step:** 1

**Solution:** Change the user or the user authorizations.

### PN\_H00100 Predictive based MAD with empty counter

**Description:** Predictive based Maintenance Activity Definition (regime PB) with an empty counter

**Scenario Step:** 3

**Solution:** Fill in the counter

### PN\_H00002 The field <text> must contain a value

**Description:** A field that is mandatory in a Activity Planner related business object is empty on the Maintenance planner.

**Scenario Step:** 2.5

**Solution:** Make field in activity planner related business object not mandatory or give all empty fields in maintenance planner related business object a value

### PN\_H00493 Picklist field has a value that is not available

**Description:** A picklist was configured for which 'Enforced' = yes and one of the values does not exist in the picklist.

**Scenario Step:** 2

**Solution:** Field should not be marked as `enforced` or value needs to be changed to an available one.

### PN\_H00538 Cannot migrated MAD because Asset is disposed or archived

**Description:** Unable to migrate a maintenance activity definition, because the asset is disposed or archived.

**Scenario Step:** 3

**Solution:** User needs to change the asset status or use a different Asset.

### ACTM\_0117 Activity cannot be linked to plan

**Description:** The Maintenance Activity Definition does not overlap with the start/end time of the Maintenance Plan it is linked to. It will be migrated as an Activity Definition, but it will not be linked to any plan.

**Step:** 3

**Solution:** add migrated activities to the correct plan after migration or correct the start- and / or end date of the existing plan in the maintenance planner.

### ACTM\_0127 Field not added to the Cluster group

**Description:** A field was used as a cluster criterium in the maintenance planner, but that field is not available for clustering in the activity planner.

**Scenario Step:** 5

**Solution:** Use other fields to cluster on.

**▲ ACTM\_0101 Quantity of Activity Definition does not match with Location assignment**

**Description:** The quantity of the activity definition is different then the quantity of the location assignement.

**Scenario Step:** 3

**Solution:** If this is incorrect, the quantity of the Activity Definition can be changed after migration.

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