Moves

Planon Software Suite
Version: L105

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 Moves

Moves is a TSI in Planon ProCenter that is designed to deal with regular moves of personnel, assets or special items (i.e. items that are not registered in a Planon ProCenter TSI, but need to be moved).

A move starts with a *move request* including several move lines, which is directly added by an employee in Moves or via Web Configuration . After assessment and approval of this move request, for example by a department manager, the request is passed on to the person who is in charge of the company's moves. This person creates move orders for all personnel and assets that need to move. By combining the move lines of one or more move requests and by assigning them to move orders, the move can be planned efficiently.

Moves – Concepts

This section describes the concepts available in Moves and how they interact with each other.

Asset

An asset is an item of value owned by an organization and registered in Assets .

The Assets TSI allows you to maintain data on assets and to keep track of their locations and owners. If an asset needs to be moved to another location, an employee can add a move request and asset move lines in Web Configuration or in Moves .

Assets include items such as office furniture, office equipment, electrical and technical installations etc.

Moves only deals with moveable assets.

> System administrators can make settings to exclude specific, non-moveable assets from being selected and displayed in **Moves** and the **Move request wizard** in Self-Service. Exclusion of assets from moves is done in the **Move settings** TSI, on the basis of the assets' classification group.

Cost center

Cost center is an element in Planon ProCenter that denotes that part of an organization that contributes to the costs of an organization, but only indirectly contributes to its profit.

In Moves you can drill down as follows: Components > Move from cost center > Move orders & requests, or Components > Move to cost center > Mover orders & requests to filter out the move requests from or to a specific cost center.

Capacity date picker

Precondition: To have the **Capacity date picker** displayed, you must set the **Take move capacity into account?** setting to **Yes** in the **Move settings** TSI. If the field is set to **No**, the regular date picker is displayed.

The **Capacity date picker** opens if you select the **Start date-time** on move requests or move orders, or if you select the **Move date-time** on asset move lines / personnel move lines. The calendar displays information regarding the available capacity for moving personnel and assets on each date. If the selected property has no capacity, the parent property's capacity is taken into account.

In Self-Service, capacity details on the **Move request wizard**'s date picker are displayed based on the **Property** specified on the move request. The capacity visualization and calculation of the move line (Personnel and Assets tabs) date picker is based on the **From property** or **To property** (depending on the **Personnel move line settings** and **Asset move line settings** in the **Move settings** TSI).

> ⚠️ This does not apply to **Special item** move lines.

The following image shows the **Capacity date picker**:

> ℹ️ In the **Move settings** TSI, under the section **Property from which move capacity is deducted in case of personnel / asset relocation**, if you set any field to **Not applicable**, the **From property** field will not be filled in on the **Capacity date picker**.

In the **Capacity date picker**, **Personnel move capacity** is depicted by the 👤 icon and **Asset move capacity** is depicted by the 🔺 icon. The icon colors have the following meaning:

Color	Availability
👤 🔺	Capacity is sufficient
👤0 🔺0	Capacity is insufficient
👤– 🔺–	Capacity is not specified

> ⚠️ The **Time** field displays the current time and <u>does not</u> affect the capacity.

Department

Department is an element in Planon ProCenter that denotes part of an organization with a specific responsibility.

In Moves you can drill down as follows: Components > Move from department > Move orders & requests, or Components > Move to department > Mover orders & requests, to filter out the move requests from or to a specific department.

Location assignment

In Planon, a *location assignment* includes the main asset location details. The assigned locations of assets are registered in Assets .

The Assets TSI allows you to maintain data on assets and to register their locations. Moves can be used to register the move of personnel and assets to a new location.

Move capacity

Building managers either employ internal staff to help with the relocation of both people and assets or they may hire external contractors. In any case, each property will have a maximum number of personnel and assets that can be moved by the available relocation staff on a specific date

In Planon, this is called **Move capacity**, a feature that allows you to specify and verify the available move capacity for a property / campus on a particular date and plan any moves accordingly.

In the **Move settings** TSI, you can enable a setting that takes the move capacity into account when adding move lines. For personnel and asset move lines you can also

specify from which property the capacity needs to be deducted in move capacity calculations.

For more information, refer to Specifying move capacity settings for personnel and assets

Adding a move capacity record for a property

Move capacity fields

Move line

The details of a move request are included in move lines. There are separate types of move lines for personnel, assets or 'special items'.

- **Move lines - personnel**: move data about the date-time of a person's move, their current location and the new destination and details about workspace requirements.

- **Move lines - assets**: similar move data about the space-related / person-related assets included in the move

- **Move lines - special items**: move data about items that must be included in the move, but are not registered as assets in Planon.

> ℹ️ The move lines created in Moves become available as read-only information in Work Orders , at the Order details > Move lines selection step.

Move lines - personnel

If you are planning a move for employee(s) within your organization, you must first create move lines for them, one line for each employee.

Move lines - personnel include details such as:

- the date-time of the move

- the date until which the move is taking place

- the person *with whom* someone is going to move (if applicable)

- data on the current location of this person

- data on the new location of this person

> ℹ️ Planon uses the selected **Move date-time** to check if a destination space is 'active' and available. For more information on deactivated spaces, see the Spaces & Workspaces documentation.

Typically, a move line is created to reserve / block a vacant (work)space for an employee. The employee will occupy that (work)space for a certain period in the future. The move line will prevent others from occupying it during the specified period.

Personnel move lines can be linked to both move requests and move orders. After they are *planned* in a move order, the move lines linked to the move request can no longer be modified, nor deleted.
However, the move lines linked to the move order can still be deleted. In that case, the move line in the request is retained.

Move lines history

It is possible to log a history of changes for specific move line fields. This feature is particularly useful for move lines, since they are typically added and edited by various users. 'History' can be enabled for the following move line fields:

- **Asset**
- **Comment**
- **Description**
- **Number of items**
- **Free** fields
- **Free date-time** fields
- **Free reference** fields
- **Free numerical** fields
- **Move option** fields

For information on enabling history for specific fields, see the Overview of field attributes in the Field definer user documentation.

> The **Move lines history** selection step must be added to the **Move detail history** level in the Moves TSI. See the TSIs user documentation for information about adding selection steps to a TSI.

Move order

A move order is an order type in Planon ProCenter .
Move orders are added by personnel who are responsible for planning moves. A move order can have suborders, but it cannot be a suborder itself.

Move orders are added by authorized Planon ProCenter users at **Move orders & requests**.

Move orders that are based on standard move orders can be used to combine the move lines of various move requests into a single move order. For this purpose, there is a special wizard available at **Details**.

The whole move process can be monitored by means of status transitions. A move order and its move lines contain all the essential details for the move (dates, times, costs etc.).

> ℹ️ If required, your Planon ProCenter administrator or a user with similar rights can customize system move orders by creating user-defined move orders.

Move request

A move request can be submitted when it is required that personnel, assets and special items move to a different location.

Staff that is authorized to do so, can create move requests in Planon ProCenter > Moves . Employees can also use the Self-Service **Move request wizard** to request a move. Move lines are added to the request, containing all the essential details on the move. After approval by a manager (status **Approved**), the move lines can be assigned to a standard move order.

> ℹ️ If required, your Planon ProCenter administrator or a user with similar rights can customize system move requests by creating user-defined move requests.

Multiple assets

A multiple asset is a group of identical assets that is entered as a single record in Planon ProCenter . Multiple assets can be physically present in various locations.

Multiple assets are added in Assets . Move lines can be created for a multiple asset. In that case, move lines can be created per location assignment.

Example

A company may own 100 identical office chairs of a specific brand and type, scattered over 20 offices. When some of the office chairs need to be moved, the new locations can be selected in the move line. Also the number of assets to be moved can be indicated per move line.

Personnel

Persons who are registered in the Personnel TSI.

Data on personnel includes information on a person's current space, workspace, department or cost center. If a person is moving to another space or building, a move request with move lines can be added in Moves which can be linked to this person. This person's move lines can subsequently be combined into move orders.

Space

A space is a defined area within a building for which data about dimensions, usage and occupancy are added to Spaces & Workspaces .

Special item

Special items are those items that must be moved to the new location, but that are not registered in any of the Planon ProCenter TSIs. In Moves special items have their own type of move line.

Special item move lines are added at Details > Move lines.

Standard move request

A standard move request is a per-configured 'template' that you can use to speed up the creation of move requests in the system.

Planon administrators can define standard move requests in Supporting data > **Standard Orders**. Users can then apply standard move requests in Moves , Work Orders or Web Configuration , after which a significant amount of move request data is automatically entered that would otherwise have to be entered manually.

> ℹ The Move request wizard web definition in Web Configuration , requires a dedicated standard move request with its own initial status and data to suit your business requirements. See the *Web Configuration* user documentation > *Move requests* for more information.

> ℹ Standard move requests can be linked to an SLA contract via an SLA service. The costs ensuing from the SLA contract can be charged to the requestor.

Standard move order

A 'template' move order that can be used to speed up entering new move orders in Planon ProCenter .

Planon administrators can define standard move orders in Supporting data > **Standard Orders**. Users can then apply standard move orders in Moves , Work Orders or Web Configuration , after which a significant amount of move order data is automatically entered that would otherwise have to be entered manually.

Status

The status shows the phase in which a move request or move order currently is.

A **Move request** can have the following system statuses.

- Draft
- Reported
- Approved

- Planned

- Executed

- Canceled

The **Draft** or **Reported** system statuses can both be used to configure a user-defined *initial* status for a (standard) move request. Using **Draft** as initial status gives requestors ample time to set up a move request, both in the Self-Service **Move request wizard** and the **Moves** TSI. While in this **Draft** status, the back-office should not take any action. Once the move request is set from **Draft** to **Reported**, they can follow up on the request.

If the **Draft** status is configured as initial status, your system administrator is recommended to go to the **Move settings** TSI and set the **Allow move requests without move lines?** field to **No**, to prevent errors in the **Move request wizard**, caused by the creation of move requests without move lines. If the **Move settings** TSI is not on the navigation panel yet, it must be added first.

A **Move order** can have the following system statuses.

- Reported

- Accepted

- Proposal

- Canceled

- Technically completed

- Administratively completed

Working with Moves

This section describes the processes and tasks that can be performed in the Moves TSI.

Adding a move request with move lines

A move starts with adding a move request to move personnel, assets or a special items to their new destination. You can add move lines to the request to specify the detailed information required for the move.

Procedure

1. Go to Move orders & requests.

2. On the action panel, select Add move request.

   Or

   At **Move orders & requests**, select **Add standard** on the action panel and select a relevant standard move request from the **Standard order** dialog box.

3. In the data section, complete the relevant fields.

   Move requests have most fields in common with regular requests. Refer to the **Work Orders** user documentation for more information on these fields.

By making relevant selections at the Properties and Components levels you can pre-fill your move request with relevant data.

4. Link the personnel or assets that are going to move to the request, by clicking Add persons or Add assets on the Links action panel.

5. In the Add persons or Add assets dialog boxes select the persons or assets that are going to move and click OK.

Use the filter options in the dialog box to filter out the relevant assets or persons. You can for example filter assets by property, space or the person to whom the asset belongs.

> **Move lines are now automatically created at Details > Move lines for the linked persons or assets. Auto-generated move lines can be modified at Details > Move lines. If you have multiple move lines selected, use Modify within selection to modify data.**

6. Click Save.

When the move request and its move lines have been approved by the responsible manager, the move lines can be assigned to a (standard) move order. With this move order the actual planning phase of the move is started.

If all move lines of a move request have been assigned to a move order, the move request's status is automatically changed to **Planned**. As a result, the move lines can no longer be modified.

If all move lines of a move request have been executed because the move orders to which they were assigned have been completed, the move request's status is automatically changed to **Executed**. As a result, the move lines can no longer be modified.

In order to enable automatic status transitions for move requests to **Planned** and **Executed**, the Planon administrator must make some relevant settings for the **Move requests** business object. See *Field Definer > Making settings for specific business objects > Moves* .

Manually adding personnel move lines to a move request

You can manually add detailed information to a move request. In this case, the data that is required when moving a person. The manager in charge of the move can subsequently filter out move lines of various move requests and assign them to a new move order that is part of a move project.

Procedure

1. At Move requests & orders select the move request to which you want to manually add person move lines.

2. At Details, select Add Move lines - personnel on the action panel.

3. In the data section, complete the relevant fields.

   For a description of these fields, refer to Move lines fields.

4. Click Save.

Use **Modify within selection** to enter data in one go in the fields of multiple selected move lines.

Manually adding asset move lines to a move request

You can manually add detailed asset information to a move request. The manager in charge of the move can subsequently filter out move lines of various move requests and assign them to a new move order that is part of a move project.

Procedure

1. At Details, select Add Move lines - assets on the action panel.

2. In the data section, complete the relevant fields. For a description of these fields, refer to Move lines fields.

3. Click Save.

Use **Modify within selection** to enter data in one go in the fields of multiple selected move lines.

Manually adding 'special item' move lines to a move request

You can manually add detailed information on special items to a move request. The manager in charge of the move can subsequently filter out move lines of various move requests and assign them to a new move order that is part of a move project.

Procedure

1. At Details, select Add Move lines – special items on the action panel.

2. In the data section, complete the relevant fields. For a description of these fields, refer to Move lines fields.

Use **Modify within selection** to enter data in one go in the fields of multiple selected move lines.

3. Click Save.

The **Move capacity** feature is not available for special item move lines.

Adding move lines for personal assets

You can add additional move lines for someone's personal assets in a single action. Assets become personal assets by entering a person's name in the **Of person** field on the asset.

Procedure

1. At Details, select a relevant personnel move line.

2. On the action panel, click Add personal assets.

The personal assets of the person who is moving are added as asset move lines to the selected move order or move request. The field **Moves along with … (person)** will automatically be filled in with the name of the corresponding person.

Adding additional move lines

With a single action, you can add additional move lines for the assets that are linked to a person's space. The same functionality also applies to Self-Service.

Procedure

1. At Details, select a relevant personnel move line.

2. On the action panel, click Add space-related assets.

Move lines are added to the selected move order or move request, for the assets that are linked to the space of the person who is moving. The field **Moves along with … (person)**

of the related asset will automatically be filled in with the name of the corresponding person.

If you do not specify a person as the asset's owner in the **Of person** field of the **Assets** business object, clicking the **Add space-related assets** action will create move lines for all the assets present in that person's space in that move request.

The **Add space-related assets** button will not create move lines for those assets that are linked to any other persons (other than the ones in the **Of person** field of **asset**) , if they do not have a personnel move line created in the same move request. Being present in the same space as the person in the move request will make no difference.

The following example will clarify how the **Add space-related assets** action works:

	'Of Person' field in Assets BO	Space
Asset 1	Person 1	0.19
Asset 2	Person 2	0.19
Asset 3	No value specified	0.19
Asset 4	Person 1	0.20
Asset 5	Person 3	0.19
Person 1	Not applicable	0.19
Person 2	Not applicable	0.19
Person 3	Not applicable	0.19

CASE 1: If a move request with a move line is created for Person 1

1. The **Add space-related assets** action will create move lines for Asset 1 and Asset 3 as they are in Person 1's space (0.19). The **Moves along with … (person)** field of Asset 3 is automatically updated to Person 1.
2. For Asset 5, no move line will be created, even if it is in the same space as Person 1's assets, because Asset 5 is linked to Person 3 who is not part of this move request.
3. Asset 4 can be added only by using the **Add personal assets** action.
4. If the **Add personal assets** action is used *before* the **Add space-related assets** action, move lines will be added for Asset 1 and Asset 4. The **Moves along with … (person)** field of these assets will be also be updated to Person 1.

CASE 2: If a move request with a move line is created for Person 2

1. The **Add space-related assets** action will create move lines for Asset 2 and Asset 3, as they are in Person 2's space (0.19). The **Moves along with … (person)** field of Asset 3 is automatically updated to Person 2.
2. For Asset 1 and Asset 5, even if they are in the same space as that of Person 2, no move line will be created, as they are linked to persons who are not part of this move request.
3. If the **Add personal assets** action is used *before* the **Add space-related assets** action, then a move line for Asset 2 will be added. The **Moves along with … (person)** field of this asset will be also be updated to Person 2.

> For more information about adding personnel-related assets, refer to Adding move lines for personal assets.

Updating move data in move lines

You can update move data in personnel move lines with the most recent personnel data from Personnel or update the move data in the asset move lines with the latest asset data from Assets .
You can view the move data in the **From / To property**, **From / To space**, **From / To workspace**, **From / To department**, **From / To cost center**, **From / To email address**, **From / To phone** and **Change from / to owner** fields.

> Fields of the type **Derived** and **Derive and Restore** are updated too.

> For details on using **Derived** and Derive and Restore field types, see the *Field Definer* part of the user documentation.

Procedure

1. Go to Details.
2. At Move lines, select the move line you want to update.
3. Select Update personnel data, in case of a personnel move line.

or

4. Select Update asset data, in case of an asset move line.

   The data in the selected move line is updated.

Updating related move lines

You can copy the destination data of a person's move line to related asset move lines, personnel move lines and special item move lines. Move lines are 'related' if the **Person** on the personnel move line is the same as the one in the **Moves along with … (person)** field of the related asset/person/special move lines.

> The destination data of a person's own assets (**To property**, **To space**) are *automatically* updated upon every change in the destination data of the person.

Use the following procedure to apply the destination data from a person's move line (the **To [...]** fields) to all the related move lines belonging to the same request/order.

Procedure

1. At Details, select the personnel move line of the relevant person.
2. Complete the data in the personnel move line. Make sure that the destination data such as To property, To space, To department, To cost center and Move date-time fields are filled in.
3. On the action panel, select Update related move lines.

The destination data of the personnel move line are copied to the related asset / person /special move lines.

Copying a move request or move order

You can copy a move request or move order, including all corresponding move lines.

Procedure

1. Go to Move requests & orders.
2. Select the move request or move order you want to copy.
3. On the Move request / Move order action panel, click Copy.

The move request or move order is now copied, including any move lines.

Sorting move lines

You can sort move lines according to a specific criterion, for example property, floor, space, department etc.

Procedure

1. Go to Move requests &orders.
2. Select the move orders or move requests whose move lines you want to sort.
3. Go to Details.
4. Resize the elements list to an appropriate view.
5. Click on the heading of the column for which you want to sort the move lines, for example Person.

The list of move lines will be sorted accordingly in descending alphabetical order.

If you want to change the order of the columns:

6. Click a column, drag it to the left or right and drop it.

Once the list is in the desired sorting order, you can continue working on the move lines.

Adding move orders manually

It is possible to add an incidental move order, for the move of personnel and/or assets. To this manually added move order you can assign the move lines of various move requests and you can also add additional move lines.

Procedure

1. On the action panel at Move orders & requests, select Add > Move order.

   Or

   On the action panel at **Move orders & requests**, select **Add standard** and select a relevant standard move order from the **Standard order** dialog box.

2. In the data section, complete the relevant fields.

   Move orders have many fields in common with regular work orders. Refer to Work Orders for more information on these fields.

> ℹ️ By making relevant selections at the **Properties** and **Components** levels you can pre-fill your move order with relevant data.

3. Click Save.

   You can now add move lines to the move order at **Details**.

Adding move orders using the move order wizard

If you want to plan a move efficiently, you can use **Create move order** wizard. In the wizard, you can combine the move lines of several move requests and link them to a new move order that is based on a standard move order.

Procedure

1. At Details > Move lines select the move lines of the move orders and requests that you want to add to a standard move order.

2. On the action panel, select the Create move order action.

The Create move order wizard is displayed.

3. On the first page of the wizard, select the standard move order to which you want to add the move lines.

4. Click Next.

5. On the second page of the wizard, if relevant, select the suborders to which you want to add move lines.

> ℹ️ If the standard move order contains a suborder with order lines, the **Lines** dialog box appears, displaying the order lines which are derived from the standard order. In the **Quantity** field, enter the number of items you want to order.

6. Click Next.

7. On the third page of the wizard, enter relevant move order data.

   The fields **Property**, **Description**, **Department**, **Cost center**, **Budget**, **Space**, **Start date-time**, and **Requestor** will already be prefilled with the data from the move request. However, if you have configured default values in Supporting data , you may receive messages whether or not to replace the values (like **Internal coordinator**, **Internal tradesperson**, etc.) with the default ones.

   If the free fields are configured on the move request, the values filled on the move request are copied to the move order. If required, you can change value of the free field. Later, it is possible to edit the free fields in the newly created move order.

8. Click Next.

9. On the last page of the wizard, check the information and click Complete.

   If you want to make adjustments, click **Previous** and make the necessary adjustments on the previous steps of the wizard before completing the creation of the move order.

> ⚠️ Creating many suborders and adding many order lines to a (sub) order may have a negative impact on the performance. The performance reduction depends on the number of move orders and your local infrastructure.

The move order, based on a standard move order, is now created and the selected move lines are added. This move order is ready to be executed.

Adding a personnel move line

Procedure

1. Go to Move requests & orders.

2. Select the move order to which you want to add a Personnel move line.

3. On the action panel, click Details > Add Move lines - personnel.

4. In the data section, complete the relevant fields.

For a description of these fields, see Move lines fields.

5. Click Save.

A Personnel move line is created.

> ℹ️ • Directly after filling in and determining the **Person** field, all the 'From' and 'To' fields are automatically populated based on information from Personnel Management. The only fields that remain empty are **From workspace**, **To workspace**, **From space** and **To space**. When specifying the **Move date-time**, Planon will try to fill in these four fields as well. If the person occupies just one workspace, this workspace will be filled in automatically in the **From workspace**, **To workspace**, **From space** and **To space** fields. If a person has multiple workspaces, these fields are left empty.
> • When the reference to the space is changed in **Workspace details** (example: from 1/1/2014 the workspace is located in space 002 instead 001), click the **Refresh move line data** action, to update the **Property**, **Space** and **Workspace** fields for the selected personnel move line. The workspace detail records that are active on the reference date are refreshed. This applies to the personnel move lines that are in the UsrReported, UsrApproved and the UsrAccepted statuses.

When a person move line (with a workspace) is saved, the following takes place.

◦ A new occupancy record is created for the destination workspace. This new occupancy blocks / reserves the workspace from the time the person is scheduled to move. The start date of the occupancy of the workspace is the same as the **Move date-time**. The end date of the occupancy is the same as the **Move until** date.

> ℹ️ A warning will be displayed if the **To workspace** is occupied or if the required area is not available.

◦ The original workspace gets an end date which is the same as the move date minus 1 day.

> ℹ️ In **Field Definer**, it is possible for the Planon ProCenter administrator to configure the free fields of move lines as additional fields with 'Move to' and 'Move from' information. For more information, see Field Definer > Setting field attributes in Field Definer > Derive and restore.

Assigning move lines to an existing move order

If you assign move lines of various move requests to an existing order, you basically copy these move lines. A read-only version of the move lines remains with the move request.

> **i** Move lines can co-exist in both move requests and move orders. A move line linked to a move request cannot be deleted if it is linked to an order. However, a move line linked to a move order can be deleted. The move line in the request remains and with it the link to the occupancies.

Procedure

1. At Details > Move lines, (multi-) select the move line(s) that you want to assign to a move order.

2. If you have selected a single move line, click Assign to move order on the action panel.

   or

   If you have selected multiple move lines, click **Action on selection**:

3. In the Action on selection dialog box, click Assign to move order.

4. In the Question dialog box, click OK to proceed.

5. In the Order dialog box, select the move order to which you want to assign the move line(s).

6. Click OK to proceed.

The action (on selection) is performed. The move lines are now assigned to the selected move order.

If you want to assign move lines that are already assigned to a move order to another move order, you can follow the above procedure, but instead use **Assign to different move order** on the action panel.

Displaying move lines of a main move order

You can display the move lines of a main move order after you have drilled down from a sub-move order.

Procedure

1. Go to Move requests & orders.

2. From the selected sub-move order, go to Details.

3. On the toolbar, click Show move lines of main order.

The move lines of the main order are displayed. Activation of this setting is retained, even after you log out.

Executing a move

You can update the Planon ProCenter database with data that is valid after the personnel and assets concerned have actually moved.

Procedure

1. Go to Move orders & requests.
2. Select the move order(s) that are required to execute the move.

> ⚠️ The move lines of the order should be carried out in the order of their move date-time. So the lines with the earliest move date-time are carried out first.

3. In the Status transitions action panel, select the Technically completed status or the Administratively completed status.

Or, if you have selected multiple move orders:

4. Select Action on selection.

In the **Question** dialog box click **OK**.

In the **Action on selection** dialog box, select the **Technically completed** status or the **Administratively completed** status, followed by clicking **OK** in the **Question** dialog box. A warning message is displayed.

5. Click Proceed if you are sure that you want to execute the move.

All relevant data concerning the personnel and assets involved in the move lines, such as property, space, department etc, will be updated with the destination data from the move order.

For multiple assets, a new location assignment may be added or old ones may be deleted as a result of the move.

> ⚠️ Once the move order is executed, it can no longer be modified.

Data concerning the person is updated with the move line data as follows:

Field of move line (in Moves)	Field of person (e.g. in Personnel TSI)
Value in **To property** field	Updates the **Property** field
Value in **To space** field	Updates the **Space** field
Value in **To department** field	Updates the **Department** field
Value in **To cost center** field	Updates the **Cost center** field
Value in **To phone** field	Updates the **Phone number** field
Value in **To email** field	Updates the **Email** field

Field of move line (in Moves)	Field of person (e.g. in Personnel TSI)
Value in a free field configured with **Derive and Restore** field type in **Field Definer**.	Updates the field from which the free field was derived.

Data concerning assets is updated with the move line data as follows:

Field of move line (in Moves)	Field of asset (e.g. in Assets TSI)
Value in **Number of items** field	Updates the **Quantity** field
Value in **To space** field	Updates the **Space** field
Value in **To department** field	Updates the **Department** field
Value in **To property** field	Updates the **Property** field
Value in **To cost center** field	Updates the **Cost center** field
Value in **Change to owner** field	Updates the **Of person** field
Value in a free field configured with the **Derive and Restore** field type in **Field Definer**.	Updates the field from which the free field was derived.

Adding a move capacity record for a property

You can decide whether you want to take into account the move capacity of a building when moving personnel and assets. Move capacity is a property's maximum number of personnel and assets that can be moved on a specific date.

Procedure

1. Go to Components > Move capacity .
2. Click Add in the action panel.
3. In the dialog box that appears, select the Property for which you want to add the move capacity and click OK.
4. In the data section, complete the relevant fields. For a description of these fields, refer to Move capacity fields.
5. Click Save.

The Move capacity is added for the property on the specified date.

- ◦ If there is no capacity specified for a property on a certain date, Planon will check the capacity of the main property and the capacity will be deducted from the main property accordingly.

- The move capacity is updated based on the move lines added on the specified date. The *used capacity* and *available capacity* fields are also modified accordingly.
- Any move capacity related warnings and errors are displayed only if the field **Take capacity into account?** is enabled in the **Move settings** TSI.
- If a move order is generated from a move request's move line, the move line will be considered only once with regard to the move capacity.

Move capacity

Specifying move capacity via Move capacity wizard

If you want to specify the move capacity for a property, on multiple dates, it would be very time consuming to add the capacity details for each date. In that case, the **Move capacity wizard** enables you to create multiple capacity records for a property. In the **Move capacity wizard**, you can specify the move frequency, start-end date and number of and occurrences.

1. In the **Moves** TSI, go to the Components selection level and select the Move capacity step.
2. Click Create capacity via wizard on the action panel.
3. In the Move Capacity Wizard that appears, complete the relevant fields. For a description of these fields, refer to Move capacity wizard fields.
4. After completing the fields, click OK.

> **i** A warning is displayed that existing capacity records on the specified dates will be overwritten with the new capacity record. This overwriting process will run as a background action and will be logged in the log files.

Move capacity records are added for the selected property on the chosen dates.

Working with the graphical viewer

In Moves , there is the option to use CAD Integrator's graphical viewer to move personnel from one workspace to another, instead of planning the move by entering data in the data section. This graphical viewer helps you to get an overview of all the available or occupied workspaces per property and per floor on the particular move date. You can click on the workspace in the graphical viewer to determine the destination.

> **i** Currently, the graphical viewer is only available for workspaces and works with *personnel move lines*. If you try to open a drawing for an asset move line or a special item move line, the viewer will not be available. For more information on adding a personnel move line, refer to Adding a personnel move line .

Opening the graphical viewer

If the relevant floor drawings are available in Planon ProCenter , it is possible to finalize a move within CAD Integrator's graphical viewer. The below procedure describes where you can find the graphical viewer in Moves .

Procedure

1. Go to Moves > Move orders & move requests.
2. Select one or more move orders/requests.
3. Go to Details **>** Move lines.
4. Select the person move line(s) you want to be shown in the graphical viewer.
5. Click the CAD Integrator tab.

   The graphical viewer opens.

> ℹ️ If you select multiple person move lines and open CAD integrator's graphical viewer, the occupancy details are displayed cumulatively. The workspaces are colored based on the sum of **To required area** and **To occupancy %** of the person move lines. Considering the availability, you can then choose to move to new workspaces on a suitable floor in the property.

Availability mapping in the graphical viewer

If you open a drawing in the graphical viewer, the *availability mapping* will help you find a suitable workspace.

If availability mapping in the graphical viewer is activated, the following colors may be shown on your floor plan:

- **Red**: workspaces that do not meet the requirements. These workspaces are not available.
- **Yellow**: workspaces that are unavailable during the entire move period. If you change the duration (**Move date** and/or **Move until date**) they may become available again.
- **Green**: workspace(s) that meet all requirements. These are available.
- **Blue**: the person's current workspace in the **Moved from** drawing. Actually it is the person's workspace as it was one day before the move date. On the **Moved to** drawing, this is your selected workspace.
- **Uncolored (white)**: Workspaces that are excluded from the filter you created.

> ⚠️ Although they are not available, yellow workspaces can be selected. A warning message appears to inform you that you have chosen a workspace that does not meet your

requirements or filter settings. For more information about these requirements, refer to Workspace filter conditions.

Workspace filter conditions

When searching for an available workspace, you can make sure that several conditions are already met on the **Data view** tab. Based on these conditions, the CAD Integrator viewer will generate the colors as described in Availability mapping in the graphical viewer:

- **Move date-time** field: enter the date on which you want to move.

- **Move until date** field: enter the date until which you want to move.

- **Required occupancy** field: enter the minimum occupancy you want the workspace to have (1-100).

- **Required area m²** field: enter the surface area you want the workspace to have (≥1).

> **i** Ask your Planon administrator to use the *default value* option in Field definer for these fields, to make sure that the fields are always populated with a value. This is very practical if new employees are included in the move, because for them these values are not specified by default.

Graphical viewer functions

The graphical viewer has a navigation panel, one or two legend(s) and a title bar in the drawing. By default, the code and name of each workspace are displayed. The element list next to the drawing displays the selected move lines (not shown in image). In addition, the graphical viewer includes multiple features. The most important ones are shown and described below:

1. **Moved from**: The graphical viewer only shows one blue workspace. This is the workspace occupied by the person from the selected *personnel*

move line on the day before the move date. He/she will move from this workspace.

2. **Moved to**: The graphical viewer shows the availability of the workspaces for the current date.

> ℹ️ The future occupancy and area of the destination workspace is checked against the start and end date of the move line. If there is a 'conflict' the workspace is marked as **Not available**.

3. **Drop-down menus for Properties and Floors**: select the property and floor whose drawing you want to see. The drop-down menu for properties is a dynamic list. This means that properties are displayed on the basis of the selected person move lines in the element list. In addition, you can also add 'static' properties to the list by using the property pre-selector (see item 4). The following symbols are used in the drop-down:

   - O = The property / floor includes at least one workspace that meets your requirements.

   - X = The property / floor does not contain any workspaces that meet the requirements.

   - * = This is the property / floor where the person from the selected move line is located on the day before the move date.

4. **Property pre-selector**: If the property pre-selector is active, properties are added 'statically' to the drop-down menu. These statically added properties are saved per user. It is possible to add 'static' properties even though they have already been added dynamically by the system. Nevertheless, these properties will appear only once in the list.

> ℹ️ The more static properties you add, the more properties and floors must be loaded into the drop-down list. This may have a negative impact on the performance!

5. **Filter**: it is possible to create your own filters. The available filters are: Cost center, Department, End date, Max. occupancy %, Start date, Tariff group, Workspace, Workspace type. If a filter is applied it is possible some workspaces may become colorless (white). These are workspaces outside your filter criteria.

> ℹ️ The filter is taken into account when showing the availability icons in front of properties and floors which makes easier to select the correct property or floor.

6. **Release workspace**: this button on the **Moved to** viewer will clear the **To workspace** field on the **Data view** tab for the selected move line.

> ℹ️ This action is irreversible! The workspace will turn either green or red (depending on the availability), after its release is accepted.

7. CAD Integrator drop-down menu: it is possible to show additional space mapping or workspace mapping in the viewer. It is also possible to show them both at the same time. By default no mapping is active. Mapping

remains activated until you deactivate it. To deactivate mapping, click on the CAD integrator menu, go to the workspace or space mapping submenu and select **None**, or click the **Clear mapping** button at the bottom right of your screen.

8. **Title**: to move the title, double click on the title. You can drag and drop the title anywhere in the drawing.

9. **Legend**: To move the legend, double click on the legend. You can drag and drop the legend anywhere in the viewer or even on top of the drawing.

> ℹ️ For more information on the actions you can perform on a floor plan in the graphical viewer, see CAD Integrator.

Moving a department

Precondition: There is a move request with move lines for each person who is going to move. The fields **Property**, **Space**, **Workspace** and **Move date** are populated with the relevant data.

The management team wants to move a whole department to another building. The team does not know which spaces or workspaces are available on the move date. The move manager receives the move request that was created on the **Move orders & move requests** level in Moves and starts planning.

Procedure

1. In Moves , go to the Move orders & requests level.

2. Select the relevant move request.

3. Go to the Details level and select the first move line.

4. Click the CAD Integrator tab to open the graphical viewer.

5. Select a property and floor. By default, the availability mapping is activated.

6. Click on a workspace to populate the To workspace field of the selected move line.

   The color of the workspace immediately changes.

7. Repeat these steps for all person move lines included in the move.

8. Check the results on the Data view tab.

Important

🔴 If a move line already is in either the *Technically completed, Administratively completed* or the *Canceled* status, the CAD drawing will be shown, but it will

no longer be possible to modify any information.

> ℹ If you want to do a complete department reshuffle on the same floor, make sure that all current workspaces are released first. Otherwise, there will not be enough workspaces available to start with. Once all workspaces have been released, it is possible to start relocating personnel. Another option is to over-occupy a single workspace first and then start moving personnel to their new workspaces.

Assigning a workspace

The move manager receives a move request for a new workspace, because a new employee is joining. The graphical viewer can be used as part of the onboarding procedure:

Procedure

1. In Moves , select the move request and create a move line for the new employee.
2. Populate the Move date (start date of the new employee) and *To*-fields such as To property, To department, To occupancy % etc.
3. Click the CAD Integrator tab.
4. In the floor drop-down menu, select a floor to check if there are available workspaces on the move date.

   The availability mapping is active, so you can see which workspaces are available.

   If you know the new employee's department, you can filter on *department*. The map will show the available workspaces for that department.

5. Click the workspace you want to assign to the new employee.
6. Go to the Data view tab to verify that the To space and To workspace fields are populated.

Releasing a workspace

The move manager receives a request to release a workspace, because the employee who occupied it has left the company. The graphical viewer can be used for part of the offboarding procedure. The move manager has already created a move order and a move line with the relevant data for this purpose.

Procedure

1. In Moves , click the CAD Integrator tab to open the graphical viewer.

2. Use the drop-down menu, to find the drawing with the workspace of the person who is offboarding. For more information on using the drop-down menu, see Graphical viewer functions.

3. With the Move to view selected, click the workspace that should be released.

4. Click the Release workspace button .

The workspace is released and turns green. On the Data view tab, the Move to workspace field is also cleared. The Move to space field is not emptied with this action. If clearing this field is also required, it must be done manually on the Data view tab. In both cases, the workspace will be available again from the move date onwards.

Moves - Field Descriptions

Move request fields

Field	Description
General	
Requestor	
Requestor	Select a requestor from the list. This is the person who has requested the move.
Internally assigned by	Select the internal person who assigned the order.
Standard order	Select a standard order that you want to apply to your move request.
Cost center	Select the cost center that applies to the move.
Department	Select the department that applies to the move request.
Property	Select the property for which you want to create a move request.
Default destination property	Select a default **To property** to be applied to all newly created move lines in this move request. The following conditions must be considered: • If the **Property** and the **Default destination property** are different, the values in **From space** and **From workspace** are not copied to the destination, even if the **Copy 'From' space / workspace to destination?** setting is set to **Yes**. The new move lines will only get the **Default destination property**. • If the **Property** and the **Default destination property** are the same and the **Copy 'From' space / workspace**

Field	Description
	to destination? setting is set to **Yes**, then the **From space** and **From work space** are copied.
	• In the **Move settings** TSI, if the **Take move capacity into account?** setting is set to **Yes**, the date picker on the move request will display the capacity based on the **Personnel move line settings**. For example,
	◦ If the **Personnel move line setting** is set to the current location, the date picker will display and calculate the capacity of the property filled in the **Property** field.
	◦ If the **Personnel move line setting** is set to a new location, the date picker will display and calculate the capacity of the property filled in the **Default destination property** field. If the **Default destination property** is not specified, the date picker will display the capacity of the property filled in the **Property** field.
Default destination space	Select a default **To space** to be applied to all newly created move lines in this move request. Filling in this field has the following consequences:
	• If the **Space** and the **Default destination space** are different, the values in **From space** and **From workspace** are not copied to the destination, even if the **Copy 'From' space / workspace to destination?** setting is set to **Yes**. The new move lines will only get the **Default destination space**.
	• If the **Property** & **Space** and the **Default destination property** & **Default destination space** are the same and the **Copy**

Field	Description
	'From' space / workspace to destination? setting is set to **Yes**, then the **From space** and **From workspace** are copied. If they are different, the **From workspace** are not copied to the **To workspace**.
To be approved by	Select the person who must approve the move request.
Number	This field is automatically populated when a move request is saved.
Request data	
Description	Enter a description of the move request.
Order group	Select the order group that applies to your move request. The order groups displayed in the list depend on the selection made at the **Components** level.
Comment	Enter a comment.
Status	Displays the status of the move request.
Service data	
Start date & time	Select a start date-time for the move request.
Internal coordinator	Select the person responsible for coordinating the move request.

Move lines fields

Field	Description
Generic fields	
Code	Enter a unique code for the move line.
Description	Enter a relevant description for the move line.
Move date-time	By default, this field displays the start date-time of the move, but this date can be edited.

Field	Description
	If the **Take move capacity into account?** field is set to **Yes** in the **Move settings** TSI, the Capacity date picker is displayed. If set to **No**, the regular date picker is displayed.
Type	Displays the move line type (INVENTORY/ PERSON/SPECIAL).
Order	Displays the name and code of the associated move request / order.
Planned move order	On a move request, this field displays the name and code of the associated planned move order.
Details of planned move order	Displays the existing code and status of the associated move order.
From property	Select the current property of the asset/person/ special item to be moved (as it is *before* the move).
From space	Select the current space of the asset/person/ special item (as it is *before* the move).
From department	Select the current department of the asset/person (as it is *before* the move).
From cost center	Select the cost center of the asset/person (as it is *before* the move).
To property	Enter the new property for asset/person/special item (as it will be *after* the move). On the **Move special items** step, this field is automatically filled with the value of the **Default destination property** (if filled).
To space	Enter the new space for the moved asset/person/ special item (as it will be *after* the move). If this field is updated in Planon ProCenter or Web Configuration , any asset move lines associated via the **Moves along with… (person)**, will also be updated with the new destination. On the **Move special items** step, this field is automatically filled with the value of the **Default destination space** (if filled).

Field	Description
To cost center	Select the asset/person's cost center as it will be *after* the move. For a person, if the **To workspace** field is populated, the cost center is also updated.
To department	Select the asset/person's department, as it will be *after* the move. For a person, if the **To workspace** field is populated, the cost center is also updated.
Moves along with… (person)	If relevant, select the person with whom this asset must be moved. Select the **Personnel from selected move order / request** filter option to see only those people who are relevant to this move.

> ℹ If the selected person's destination is updated, this change is also applied to the asset move line linked via this field. If the destination of the person entered in this field changes, the destinations of the other linked people are <u>not</u> updated, since it is unknown whether the new space and workspace will meet the requirements. *Example*: If the **To space** field is updated on this person's move line, the same field is also updated on the asset move line.

Field	Description
Original move request	Displays the code and name of the request to which the move line was linked originally.
Move line of related move order	Displays the name and code of the move line in the related move order.
Move line of related move request	Displays the name and code of the move line in the related move request.

Asset move line fields

Field	Description
Asset	Displays the asset that is linked to the move request.
Number of items	The number of assets to be moved.
Change from asset location	Displays the location of the asset before the move. This field can be edited.
Change from owner	If relevant, enter the owner of the asset *before* the move.
Change to asset location	Displays the new asset location details after the move has been executed.
Change to owner	If relevant, enter the owner of the asset (as it will be *after* the move).

Field	Description
Person move line fields	
Person	Select the person to be moved. This field can be used to:

- view / filter out all assets or personnel involved in the move of a person.

- update the destination data of all assets / personnel that move along with this person whilst updating the destination data of this person.

If you change the person to be moved, the **From workspace** and the **To workspace** are emptied. If you save the move line, the occupancies are restored to the state before the move line was added.

Move until date	Enter the date until which the move will be valid.
From workspace	Specify the person's (current) workspace. This field can be empty:

- if a person needs a second workspace, alongside his/ her current workspace. In that case, only the **To workspace** needs to be filled.

- if you are on-boarding a new employee. Only the **To workspace** needs to be filled.

The user can only select a workspace in **From workspace**, if both the **Person** and **Move date** fields are populated.

The **From workspace** pop-up only shows the workspaces that are occupied by the selected person on the move date (for at least one day).

From e-mail address	Enter the person's e-mail address from *before* the move.
From phone	Enter the person's phone number from *before* the move.

Field	Description
To e-mail address	Enter the moved person's e-mail address, as it will be *after* the move.
To phone	Enter the moved person's phone number, as it will be **after** the move.
To occupancy%	Displays the minimally required occupancy % in the **To workspace** field. By default, the value of the current occupancy % (from the **From workspace** field of the person to be moved) is filled in. If you change the **From workspace**, the **To occupancy %** is also updated in the person move line. This value is also used to create an occupancy after saving the person move line.
To required area	Displays the minimally required area in the **To workspace** field. This information is taken from the **Position** field in **Personnel**. If the person to be moved is changed (in the move line), the **To required area** field is updated accordingly. If a person's position is not specified in **Personnel** or if no area is determined for that particular position, a default value of *8 m²* is filled in. This value is also used for creating an occupancy after saving the person move line.
To workspace	Specify the workspace to which the selected person is moving. Only the following workspaces are shown: • workspaces available for the selected person's move period (**Move date-time** to **Move until date**) • workspaces available for the minimum occupancy percentage • workspaces that have the minimum area that is required for the person to be moved

Field	Description
	Note: workspaces ended on or between the **Move date-time** and **Move until date** are not displayed in the list. In the **To workspace** pop-up, you can filter the workspaces based on the following criteria: • Select the check box **Only show workspaces that are ...** to filter the available workspaces based upon **To occupancy %** and **To required area**. Be aware that de-selecting this checkbox could cause overoccupied workspaces! • If **To occupancy %** is populated, only those workspaces are shown that are available for at least the percentage specified for the determined period (move date – move until date). • If **To required area** is populated, only those workspaces with that particular surface area are shown. • The workspaces can also be filtered based on **Property**, **Complex** or **Space**. • Select **All** to select all workspaces. • The workspaces can also be filtered based on **Floor**.
	If a **Floor** is selected and you select **All** or **Property** below **Show Workspaces within**, only those workspaces with that particular floor are shown.
Required number of boxes	Enter the number of boxes needed to move the person.
Required surface area	Enter the required number of cubic meters required for the person to be moved.

Field	Description
Occupancy end date	This field is updated, if the **From workspace** and **Move date-time** fields are populated. This date is always one day less than the **Move date-time**.
Overwrite person data	Select **Yes / No**. If you select 'yes', the personnel data from **Personnel** will be overwritten when the move order is set to the **Technically completed** or **Administratively completed** status. If multiple move lines (within the same move order) have the value **Yes**, the system will take last one as leading.
Move option 1 up to and incl. 16	The names of these yes / no fields are customizable and likely to be different in your configuration. Use these customized yes / no fields to specify a number of actions that have to be executed for this move. For example: whether or not the phone or network must be patched again after the move, whether a new name plate should be created, or whether the room needs to be cleaned etc.

Move capacity fields

Fields	Description
Move capacity date	Select the date for which you are specifying the property's move capacity. ⓘ An error is displayed if the date is more than a year before the current date or more than three years after the current date.
Personnel - move capacity	Specify the maximum number of people that can be relocated on the selected date. You cannot specify a negative value.
Asset - move capacity	Specify the maximum number of assets that can be relocated on the selected date. You cannot specify a negative value.
Personnel - used capacity	When a personnel move line is added on the specified date, the used move capacity is updated (based on the capacity specified in the **Personnel - move capacity** field). This is a read-only field.

Fields	Description
Personnel - available capacity	When a personnel move line is added on the specified date, the available move capacity is updated automatically (based on the capacity specified in the **Personnel - move capacity** field). This is a read-only field.
Asset - used capacity	When an asset move line is added on the specified date, the move capacity is deducted and the used capacity is updated automatically. This is a read-only field.
Asset - available capacity	When an asset move line is added on the specified date, the move capacity is deducted and the available capacity is updated automatically. This is a read-only field.

Move capacity

Move capacity wizard fields

Fields	Description
Property	Select the property for which you are adding the move capacity records.
Frequency	Select a frequency pattern for the move capacity.

Period

Start date	Select the date on which the move capacity needs to be added. The selected capacity will be available from this date.
	ℹ The selected date cannot be more than one year before the current date.
End date	Select the end date for the capacity records. The specified capacity will be added until this date.
	ℹ The end date cannot be more than three years after the current date.
Occurrences	Specify the number of occurrences for the capacity. For example if the occurrence is **Every 3 weeks**, the capacity will be applied to every third week.

Fields	Description
	ℹ️ Numbers entered in the **Occurrences** fields should be between the specified start and end date.
Day	Check / uncheck the week days depending on your preferences. Enter the personnel and asset capacity of those days. For example, if you check Monday and Friday, the capacity will be applied to all Mondays and Fridays within the specified occurrence and start & end date.

Working with Move settings

Move settings is a TSI where you can make various settings for the **Moves** TSI in Planon ProCenter and the **Move request wizard** in Planon Self-Service.

This section describes the various settings available in the **Move settings** TSI. It also refers to other TSIs, such as Self-Service modules > Moves or **Field definer** in Planon ProCenter, where you can configure move-related processes.

General move settings

Settings related to the Moves TSI can be made on the **General** tab of the **Move settings** TSI. These settings include:

- Activation of automatic status transitions to (user-defined) move request statuses.

- Synchronization of move lines.

For a description of these fields, refer to Moves - general settings fields.

> ⚠️ If no statuses are selected in the **Automatic status transition to user-defined Planned statuses** and **Automatic status transition to user-defined Executed statuses** sections, there will be no automatic status transitions for move requests.

To set automatic status transitions for move requests

Use the following procedure to set automatic status transitions for move requests to a **Planned** user-defined status.

Procedure

1. Go to Move settings **>** General tab.
2. Under the Automatic status transition to user-defined Planned statuses section, open the Move settings - User-defined 'Planned statuses' pop-up.

The User-defined 'Planned statuses' dialog box is displayed.

3. In the Available section, select the 'Planned' user-defined statuses to be assigned to move requests whose move lines have all been assigned to a move order.
4. Click the right arrow button to transfer these statuses to the In use section.
5. Click OK.
6. Click Save.

You have now made status transition settings for move requests whose move lines have all been assigned to a move order.

Setting automatic status transitions for move requests

Use the following procedure to set automatic status transitions for move requests to a user-defined **Executed** status:

Procedure

1. Go to Move settings > General tab.
2. Under the **Automatic status transition to user-defined Executed statuses** section, open the **Move settings - User-defined 'Executed statuses'** pop-up.

   The **User-defined 'Executed statuses'** dialog box is displayed.
3. In the **Available** section, select the 'Executed' user-defined statuses to be assigned to move requests whose move lines have all been completed.
4. Click the right arrow button to transfer these statuses to the **In use** section.
5. Click **OK**.
6. Click **Save**.

   You have now made status transition settings for move requests whose move lines have all been completed.

Prevent creation of move requests without move lines

By default, Planon allows you to set a move request from its initial status to the next status, even if there are no move lines added (yet). However, if the **Draft** status is configured as the *initial* status for a move request, it is recommended to prevent the creation of move requests without move lines, since submitting 'empty' move requests will cause errors in the **Move request wizard**.

Procedure

1. Go to the Move settings TSI.
2. Set the Allow move requests without move lines? field to No.

   If users try to submit a move request without move lines in the Move request wizard, they will get a message stating that move lines must be added first.

> ℹ️ For more information on configuring the **Draft** status, see the *Web configuration* > *Configuring a Draft status for move requests* documentation.

Prevent copying current space / workspace to destination

On creating a move line for a person, asset or special item, Planon initially fills the destination ('**To**') space / workspace with the current ('**From**') space / workspace. Users can edit the destination (spaces and workspaces) as soon as they are known. However, if editing is too cumbersome for end users, you can prevent destinations from being pre-populated with the current values. Make the following setting to leave the destinations empty by default on creating new move lines.

Procedure

1. Go to the Move settings TSI.
2. Set the Copy 'From' space / workspace to destination? field to No.

   If end users create move lines in the Move request wizard or in the Moves TSI, the To fields of Space and Workspace will remain empty.

Excluding assets from moves

It is possible to prevent assets from being selected for moves in the **Moves** TSI, based on their Asset group.

Procedure

1. Go to the Supporting data **>** Move settings TSI.
2. Select the Asset move line settings tab.
3. In the Asset group field, open the Link asset groups dialog.
4. Go to the Included section and select the asset groups you want to exclude from moves.
5. Move these groups to Excluded by clicking the right arrow button.
6. Click OK.

   Assets from the selected asset groups can no longer be selected for moves.

Excluding spaces from moves

In the **Moves** TSI and the **Move request wizard**, it is possible to prevent specific spaces from being selected on asset move lines. The spaces can be excluded on the basis of either their **Space type** or their **Space standard** and the selected move date. The **Exclude space types** or **Exclude space standards** settings prevents excluded spaces from being displayed, such as washrooms, for example.

> If you switch between exclusion criteria, from *space type* to *space standard* or vice versa, the previous choice remains visible on the layout, but will no longer be editable.

1. Go to the Supporting data > Move settings TSI.
2. Select the Asset move line settings or **Personnel move line settings** tab depending on what you want to exclude.
3. In the Space type field, open the Link space types.
4. Or, in the Space standard field, open the Link space standard dialog.
5. From the Included section, select the space types / space standards you want to exclude from moves.
6. Move these groups to Excluded by clicking the right arrow button.
7. Click OK.

   Spaces of the selected space types or space standards can no longer be selected for moves.

> If a space has two active **Space usages** on the same date and one of the space usages has excluded spaces (based on space type / space standard) while the other has included these same spaces, the excluded spaces will still be displayed in asset move lines in **Moves** TSI and the **Move request wizard**.

Specifying move capacity settings for personnel and assets

You can choose if you want to take into account the move capacity of a building when moving personnel and assets. Move capacity is the maximum number of relocations that can be carried out for a property on a specific date. For personnel joining / leaving, for incoming / outgoing assets and for regular moves (between properties), you can specify from which property the move capacity needs to be deducted or if no deduction is required (for joiners / leavers).

> Before activating move capacity settings, it is recommended to first create the required move capacity records as completely as possible in the Moves TSI at Components > Move capacity.

Procedure

1. Go to the Supporting data > Move settings TSI.
2. On the General tab, set the Take move capacity into account? field to Yes.
3. To specify from which property the move capacity needs to be deducted in case of personnel or asset relocation:

1. On the **Personnel move lines** settings tab, fill in the fields under the section - **Property from which move capacity is deducted in case of personnel relocation**.
2. On the **Asset move lines** settings tab, fill in the fields under the section - **Property from which move capacity is deducted in case of asset relocation**.

For a description of these fields, refer to Move settings fields.

4. Click Save.

The personnel and asset move capacity related settings are added.

> Planon strongly recommends maintaining the same move capacity settings for both **Personnel move lines** and **Asset move lines**.
> On the **Move requests & orders** level, the **Personnel move lines** settings are used to display the available capacity on a certain date. The reason for this is that it is unknown if an end user has added assets or persons using the capacity information on the **Move requests & orders** level.

Recalculating move capacity

If the **Take move capacity into account?** setting is set to **No**, it is strongly recommended to recalculate the capacity as soon as changes are made to previously created capacities of move lines on different dates. If you omit to do so, any capacity changes made to move lines with this setting disabled, will not be included in the calculations when the **Take move capacity into account?** setting is later set to **Yes** . The same also applies to other **Move settings**: I changes are made to the **Personnel move lines** setting and **Asset move lines** setting will also be disregarded if you forget to recalculate.

Procedure

1. Go to the Move settings TSI.

2. On the data panel, set the Take move capacity into account? setting to Yes.

3. Click Save.

   A warning is displayed to recalculate capacity based on the current move lines.

5. Click Proceed.

6. On the Move settings action panel, click Recalculate capacity.

7. In the dialog box, select the Properties for which you want to recalculate the move capacity.

> Only properties with move capacity records are displayed.

8. In the Date effective field, specify the start date for recalculating the move capacity.

9. In the End date field, specify the end date until when you want to recalculate the move capacity.

10. Click OK.

The move capacity records are recalculated. This process will run as a background action.

Moves - general settings

Field	Description
Move settings - User-defined 'Planned statuses'	Displays the user-defined **Planned** statuses that are used in automatic status transitions for move requests whose move lines have all been assigned to a move order.
Move settings - User-defined 'Executed statuses'	Displays the user-defined **Executed** statuses that are used in automatic status transitions for move requests whose move lines have all been completed, because the corresponding move order has been completed.
Synchronize move lines?	This setting allows you to specify if changes in the move line of a move order should be carried through in the corresponding move line of the move request.

Move settings fields

Fields	Description
Personnel move lines settings tab	
For personnel joining the company	Specify if the move capacity needs to be deducted from the destination property or if it is not applicable at all.
For internal personnel moves	Specify if the move capacity needs to be deducted from the current location or the destination property.
For personnel leaving the company	Specify if the move capacity needs to be deducted from the current location or if it is not applicable at all.
Asset move lines settings tab	
For assets entering the company	Specify if the move capacity needs to be deducted from the destination property or if it is not applicable at all.
For internal asset moves	Specify if the move capacity needs to be deducted from the current location or the destination property.
For assets leaving the company	Specify if the move capacity needs to be deducted from the current location or if it is not applicable at all.

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