Objectives

Planon Software Suite

Version: L105

Planon
Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

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 Objectives

The **Objectives** TSI allows you to set objectives and evaluate the progress over time.

You can define:

- a reference period with a reference value
- the end objective or the expected objective per period
- the number of periods for objectives

By calculating the objectives from start to end, you can verify if your goals will be realized and take measures if these goals are realized too late or too soon. Objectives can be very diverse, from energy savings to reducing the work orders of a certain department.

Example: a building consumed 50 m3 of gas in the year 2020 and the goal is to reduce the gas consumption by 5% per year for 5 years. Planon calculates the gas consumption in 2021, 2022, etc. Using meter readings, a Planon-as-a-Platform (PaaP) app can calculate the actual gas consumption registered in Planon (for 2021, 2022, etc.). Based on both figures, you can check whether the progress is as expected.

You can collect and enter the real life data manually or select the real life data via, for example, a Planon-as-a-Platform (PaaP)/BI or DAM solution. Please note that these solutions are not part of the standard **Objectives** solution, they can be part of an implementation project.

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Objectives

Objectives are specific goals that must be achieved within a certain time frame, for example reducing gas consumption by 5% per year over a period of 5 years.

Objective definition

An objective definition can be used to set and monitor a specific objective. In some cases it can be useful to split a main objective into a series of smaller subobjectives and monitor their progress. The objective at the main level provides a clear overview of the progress of the underlying objectives.

You can add communication logs to an objective definition.

Period for objective

This is the time span within which a certain objective must be achieved.

You can define several periods for objectives, each with an expected objective per period and an objective at the end. Calculating the objectives from start (reference period) to finish allows you to evaluate progress over time and take action if necessary.

Reference period

A reference period is a point in time used as a reference point for comparison with other periods, the periods for objective.

Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.

For communication logs that were automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see Communication log fields.

You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Working with...

This section describes the various functions available.

Creating objective definitions

You can add (sub)objective definitions to set and monitor specific objectives.

Procedure

1. Go to Objectives > Objective definitions.
2. On the action panel, click Add.

If you want to add a subobjective, click Add subobjective definition.

3. On the data panel enter the data for the objective definition.

See Objective definition fields for more information on these fields.

4. Click Save.
5. On the action panel, click Link to link the objective definition to one of the following items:
   - Properties
   - Departments
   - Assets
   - Contracts
   - Contract lines
   - Floors
   - Rentable units
   - Order groups
   - Cost centers
   - Impact areas

These links are for information only, they do not affect the forecast calculations.

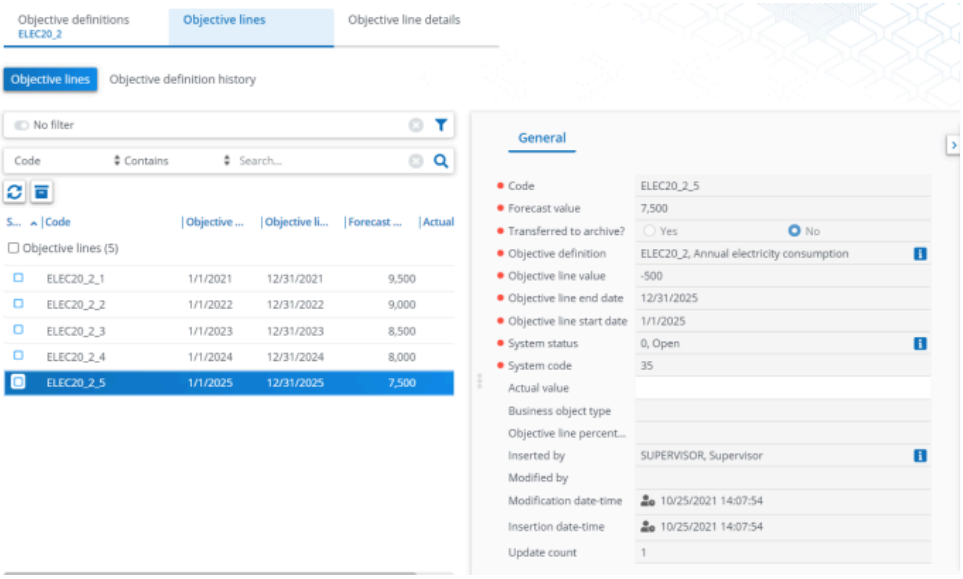
You have now created an objective definition. After setting the objective definition's status to **Active**, Planon automatically generates the corresponding objective lines. You can close the objective lines one by one through a status transition to keep track of the remaining period of the objective. You can adjust the objective halfway. After the objective definition

has been activated, you can track its progress on the objective lines and if required adjust the definition for the remaining open periods. For more information, see Objective line fields.

Example

- Energy consumption of a building = 10,000 kWh
- Reference period = 1 year (2020)
- Objective = reduce the energy consumption from 10,000 kWh to 7,500 kWh
- Strategy = periodic
- Value change per period = -500
- Objective period = 5 years (2021-2025)

  Based on this input, Planon creates 5 objective lines for the period of five years, each with a reduction of -500 per year.



Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Objective definition fields

Field	Description
Code	Enter a unique code to identify the objective definition.
Description	Enter a description for the objective definition.
Objective strategy	Select one of the following options from the picklist: • **Once**: the target value at the end of the objective period • **Periodic**: the value change per objective period
Unit	Select the unit of measurement, for example Energy KWh.
Percentage	Enter the percentage for the objective. The percentage can be positive, negative and it can exceed 100 %. • If the objective strategy is set to **Periodic**, it is the percentage change per objective period. • If the objective strategy is set to **Once**, it is the percentage at the end date of the objective period.
Value	Enter the value for the objective. • If the objective strategy is set to **Once**, you can enter the target end value in this field. • If the objective strategy is set to **Periodic**, it is the value change per objective period.
Project	You can link a project to the objective definition by selecting one of the available projects from a pick list.
Reference period value	Enter the value of the reference period. This can be entered manually or automatically determined by Paap, DAM etc.

Field	Description
	Example: the energy consumption of your organization for 2020 - the reference period - is 80,000 kWh and you want to reduce it to 65,000 kWh for the year 2026.
Reference period	Specify the duration of the reference period. For example: 1 year, 6 months, 4 weeks.
Reference period start date	Enter the start date of the reference period. This can be any day (not necessarily the first day of the period)
Reference period end date	Displays the end date of the reference period. This date is calculated by Planon: **Reference period start date** + **Reference period** - 1 day (up to and including).
Objective period start date	Enter the start date of the objective period. This can be any day after the reference period end date.
Objective period end date	Displays the end date of the objective period. This date is calculated by Planon: **Objective period start date** + **Number of objective periods** * **Reference period**.
Number of 'objective periods'	The number of periods for which the objectives are calculated.
Deviating?	Use this setting to configure gaps between the objective periods. For example if you want to compare data of December months or first quarters.
Objective period 2nd date	In case the setting **Deviating?** = **Yes**, this date determines when the second objective period will start.
Objective's origin	Select an objective's origin from the list. An objective's origin refers to the reason why an objective was defined. Objective's origins are added and maintained in Supporting data. See Objective's origins.
Objective classification	Select an objective classification from the list. Classifications can be used to group objectives. Objective classifications are added and maintained in Supporting data. See Objective classifications.
On-track per period	This read-only field indicates if the progress at the end of an objective period is still on track. Possible settings: **Yes**, **No** or no value. An empty value means 'not applicable'.
	The value in this field is copied from the **On-track per period** field of the last closed objective lines. If you want to use this

Field	Description
	functionality, you must enter the actual values per period and close the objective lines.
On-track average	This read-only field indicates if the progress in reaching the objective, measured in time, is still on track. Possible settings: **Yes**, **No** or no value. An empty value means 'not applicable'.
	The value in this field is copied from the **On-track average** field of the last closed objective lines. If you want to use this functionality, you must enter the actual values per period and close the objective lines.
Details for 'Subobjective on track'	This read-only field indicates if the progress of the subobjectives at the end of an objective period is still on track. Possible settings: **Yes**, **No** or no value. An empty value means 'not applicable'.

Objective line fields

Field	Description
Objective definition	Displays the objective definition for which this line has been calculated.
Objective line start date	Displays the start date of the objective line.
Objective line end date	Displays the end date of the objective line.
Objective line value	Displays the calculated value change for this objective line.
Objective line percentage	Displays the calculated percentage change for this objective line.
Forecast value	Displays the calculated value expected at the end date of the objective line. You can *manually* change this value as long as the period is still open.
Calculated forecasted value	Planon calculates the forecast value and copies this value to the **Forecast value** field (at initial calculation or at recalculation).
Manually forecasted value?	If you manually change the **Forecast value**, Planon switches the setting **Manually forecasted value?** to **Yes**. The **Calculated forecasted value** and **Forecast value** are no longer the same.

Field	Description
	The 'on-track' calculations are based on the **Forecast value**. The **Forecast value** of the last objective line cannot be changed.
Actual value	Here you can enter the actual value. This value can be compared with the calculated forecast value. This field is based on either manual input or on a query via PaaP / DAM.
Reference period value	This calculated field displays the initial value at the start of the reference period, as entered at the objective definition.
Deviating value	This calculated field displays the difference between the **Forecast value** (as calculated by Planon) and the **Actual value** (only if the **Actual value** has a value).
On-track per period	This read-only field indicates if the progress at the end of a specific objective period is still on track. Possible settings: **Yes**, **No** or no value. An empty value means 'not applicable'. The value in this field is determined by the objective definition settings.
Cumulative forecast value	This calculated field displays the difference between the **Forecast value** and the **Reference period value**.
Cumulative actual value	This calculated field displays the difference between the **Actual value** and the **Reference period value** (only if the **Actual value** has a value).
Average deviating value	This field displays the **Average deviating value**, calculated by adding the average values of the objective lines of all previous periods up to the objective line of the current period and dividing this value by the number of periods. For example: • First period: **Deviating value** = 8, **Average deviating value** = 8 • Second period: **Deviating value** = 10, **Average deviating value** = (8+10)/2 = 9 • Third period: **Deviating value** = 3, **Average deviating value** = (8 +10 + 3)/3 = 7 • Fourth period: **Deviating value** = -5, **Average deviating value** = (8 +10 + 3 - 5)/4 = 4
On-track average	This read-only field indicates whether the progress measured in time in achieving the objective - based on all periods to date - is still on track. Possible settings: **Yes**, **No** or no value. An

Field	Description
	empty value means 'not applicable'. The value in this field is determined by the objective definition settings.

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