



Performance score

Planon Software Suite

Version: L105

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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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Performance score

Companies and organizations require simple tools to analyze performance. Typically, they refer to a set of predefined key performance indicators (KPIs). When this data analysis remains inconclusive, a further dimension will be helpful.

The Performance score is such a new dimension. It enables you to compare data against a user-definable attribute in order to reach a conclusion.

i Since you are absolutely free to use this function, its application is only limited by computational or creative bounds.

Process

1. Data is extracted from Planon by using an interface.
2. It is processed by a predefined [algorithm](#), which results in a score.

i

- Since it is the customer's business case, the algorithm applied is the customer's responsibility.
- Processing tools can be internal (Data Aggregation Manager, Enterprise Talk, UX-triggers) or external (BI data processing tools)

3. The score is imported into the business object's **Performance score** field.
4. The Performance gadget and **Performance score** field reflect the new score.

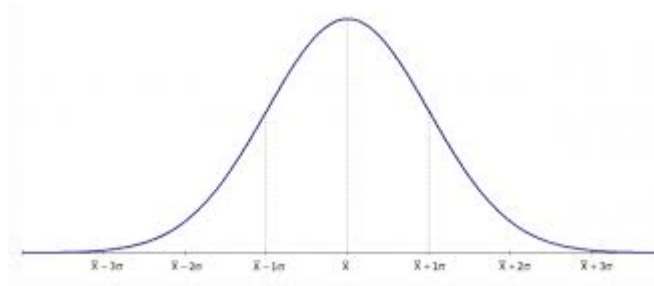
i

- This process can be reiterated (schedulable) as often as required to give you real-time information for the best possible analysis.
- To be able to use the Performance score functionality, you require a new license.

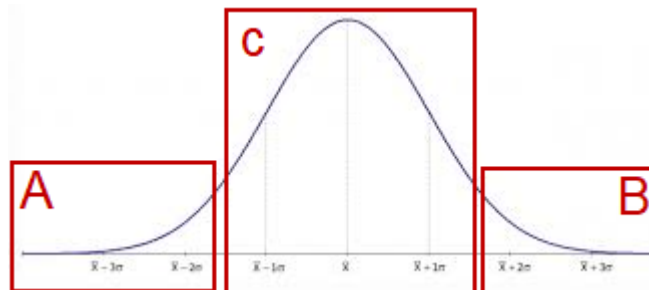
Algorithm

The **Performance score** is based on a data computation, an algorithm that results in a statistical distribution of data.

The algorithm that you apply is free-definable. A typical use case would be to apply an algorithm that results in a normal distribution of data. When represented in a chart, such an algorithm would result in bell shaped curve, also called a Gaussian curve:



A classification of such data could result in three categories:



- Bad performing (A)
- Well performing (B)
- Good performing (C)



This analysis enables you to quickly identify and learn from what is going well (B) and apply this on what needs to improve (A). Gradually, in a process of continuous improvement, the performance shifts to the right and the performance is more even resulting in a narrowing graph.

Algorithm library

A performance score is determined by defining an algorithm that computes on a variety of underlying data. The algorithms will expand and evolve.

Planon could attain multiple of such Performance Qualification Scores (PQS) because there can be multiple views on performance, based on the role that a person has:

- A maintenance manager would be inclined to look at asset performance in terms of energy consumption and uptime patterns.
- a Service Provider's contract manager could be inclined to look at the same asset in more financial terms (cost and benefit).
- SLAs could have various PQS each looking at specific aspects of performance (financial, quality, responsiveness, etc).

Gradually, a library of algorithms will emerge to compute the performance scores of the various business objects. These algorithms can be of a different nature; from almost traditional approaches to the adoption of machine learning, where we would use (IoT and

other) data to 'learn' how to denominate performance itself: the system would 'learn' how the organization for which it is being used, actually perceives 'performance'.

Score chart

A slope graph (gadget) that shows two qualifications in one view: the score (0-10) on the Y-axis and the percentage of records (1-100) with a particular score on the secondary Y-axis.



The combination of score and percentage enables you to immediately identify the records that require attention.



The score is based on a computed field, **Performance score**, that is defined for the business object for which the Score chart is created.

Use cases

There are many potential situations in which a performance score / score chart could be used. The following use cases are presented just to give you an impression of its range of applicability.

1. Real estate

When researching the location of a new property, a company can apply the criterion of accessibility to its employees. The company weighs access by public transport, travel by bike or on foot higher than access by car.

Per personnel member, the distance to each potential property is calculated through Google Maps. The resulting data is processed by an algorithm that takes into account the travel weight factor. Per location, this results in a score that can be shown in the score chart, which allows the company to optimize the selection of their new property.

2. **Environmental conditions**

Organizations are concerned with the well-being of their employees. FM Managers would like to clearly see which spaces are performing well or bad in terms of climatic conditions (temperature, humidity, CO₂-levels), but only those measured during the time that the space was in use. The data is provided by using a sensing system that measures these properties. The environmental conditions are given a specific weight in order to classify them: far too low (value -2), too low (value -1), okay (value 0), too high (value 1), far too high (value 2). The algorithm takes into account this factor when computing the performance score.

3. **SLA contract performance**

Contract managers are keen on assessing the performance of SLA contracts. Typical KPIs that measure Time-to-Complete scores can result in data that remains inconclusive. If you would factor in another qualifier, contract performance can be assessed more clearly: SLA amount. This allows the contract manager to assess the performance of SLA contracts by weighing the Time-to-Complete score against costs. The algorithm results in a performance score that can be represented in a [score chart](#).



In this context, the last use case will further be elaborated on.

Configuration

To make the most of the functionality, some configuration is required. This involves:

- Reconfiguring a free field to list the performance score.
- Adding the **Performance score** field to the business object's layout.
- Optionally - adding the **Performance score** field to the business object's elements list (as a customizable list).
- Creating and configuring a Score chart definition.
- Adding the Score chart definition to your home page.



The following configuration examples are based on the third use case described in [SLA contract performance](#).

Field configuration

To use the performance score functionality, some configuration is required.

1. Go to Field Definer, select the Contract lines business object and set it Under construction.
2. Select a free string field, set it to In use, change its field type to Performance score and rename it to Performance score.



The field type of Free fields (FreeString) and Free reference fields (FreeInteger) can be converted to a Performance score field (BIPlanonScore). Consequently, FreeInteger fields can be configured as BIPlanonScore and these can thus be used in a quick search or an [advanced search](#).

3. Set the business object to Completed.

This step will enable you to create a Score chart definition for this business object.

Layout configuration

Add the **Performance score** field to the layout.

1. In Layouts , go to SLA contract line and set it Under construction.
2. Add the Performance score field to the layout, save it and set it to Completed.

This field can now be populated.



This field can only be populated through an interface with Planon.

TSI configuration

Add the **Performance score** field to the elements list.

1. In TSIs , go to Contracts and set it Under construction.
2. Go to the TSI level and go to the Contract details > Contract lines step.
3. Click the Customizable list pop-up and create a list that contains the Performance score field and other information that you want to display in the elements list.
4. Set the TSI to Completed.

When the Performance score field is populated, the value will be displayed in a coloring scale that is automatically adjusted based on score.

The screenshot shows the 'Contracts' application interface. On the left, there is a list of contract lines with columns for 'Code', 'Performance score', and 'Code'. The 'Performance score' column is highlighted with a color scale ranging from red (low score) to green (high score). The main panel on the right shows the 'Contract details' for a specific contract line, including fields for 'Property', 'Rentable unit', 'Commercial quantity', 'Unit of measurement', 'Price per unit of measurement', 'Amount dates', and 'Financial details'. The 'Performance score' field in the 'Financial details' section is highlighted with a color scale, showing a score of 6.

Web configuration

Configure the Score chart definition and link a Publisher list.



It is assumed that you have already added the **Score charts** (PssModuleBI_Step) to a TSI to configure it in Web configuration.

1. Go to Web Configuration , and create a Score chart definition for the SLA contract line business object.
2. Fill out the Score field definition (Performance score).
3. Click Save.

4. Create a Publisher list (on the contract line business object) and link it to the score chart.

You can skip this step now and return to complete it when you configure the Publisher list configuration later in this procedure.

5. Search block: add the Contract field (reference field to contracts), enable search immediately and create a selector.

The Contract field will allow you to show scores of contract lines pertaining to that contract.

6. Create a Publisher list for the SLA contract line business object.
7. Create a row expander for the Publisher list.

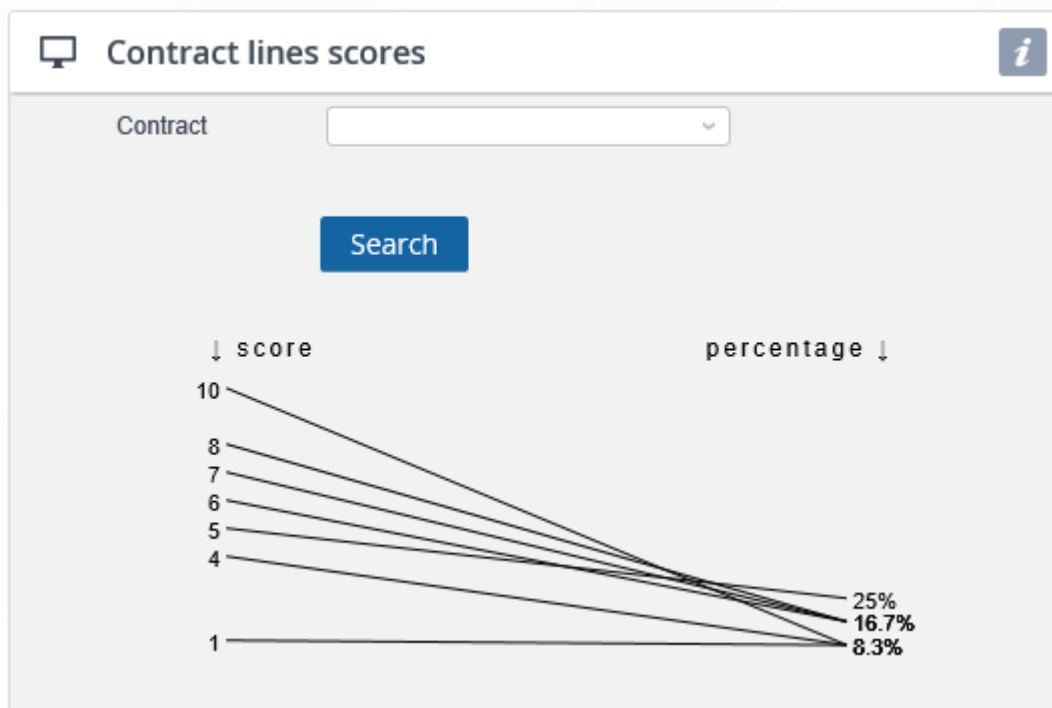
Reference the orders that are linked to SLAs.

8. List block: add the fields whose details you want to show when you click in the graph to display its details.

If you skipped it earlier, remember to link the Publisher list in [Step 4](#).

9. Add the Score chart to your home page.

Score chart on your home page:



By clicking a score in the chart, you navigate to the details of the contract lines with that score (Publisher list):

The screenshot shows a window titled "SLA amounts" with a close button in the top right corner. In the top right of the window content, there are icons for PDF export and printing, along with left and right navigation arrows. Below these is a table with the following columns: Contract, Code, Description, Amount, and Amount per. The table contains one row with the following data: Contract: Pest_001, Pest control - Rentokil; Code: 001; Description: Pest control call out; Amount: € 2,000.00; Amount per: Year. Below the table, there is a white box containing a button labeled "Orders" with a right-pointing arrow. At the bottom center of the window, there is a "Back" button.

Contract	Code	Description	Amount	Amount per
Pest_001, Pest control - Rentokil	001	Pest control call out	€ 2,000.00	Year

Orders →

Back

By clicking **Orders** in the details, you navigate to the related orders (row expander):

Work orders linked to SLAs



Number	Description	Contract line	SLA	SLA service	Priority	Actual completion date-time	'Time to complete' score
194.00	Pest control call out	001, Pest control call out	E0011, Emergency (pest)	E-PEST, Pest control call out	Within 2 hours	01/02/2018 15:49	5
196.00	Pest control call out	001, Pest control call out	E0011, Emergency (pest)	E-PEST, Pest control call out	Within 2 hours	02/02/2018 15:49	-5
198.00	Pest control call out	001, Pest control call out	E0011, Emergency (pest)	E-PEST, Pest control call out	Within 2 hours	01/02/2018 18:49	-5

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