Planon RE Master data

Planon Software Suite

Version: L119

Building Connections

About this Document

Intended Audience

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

Contacting us

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

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

Table of Contents

Planon RE Master data

The Master Data application stores data that is used by other Planon applications within your organization.

Data that is stored is:

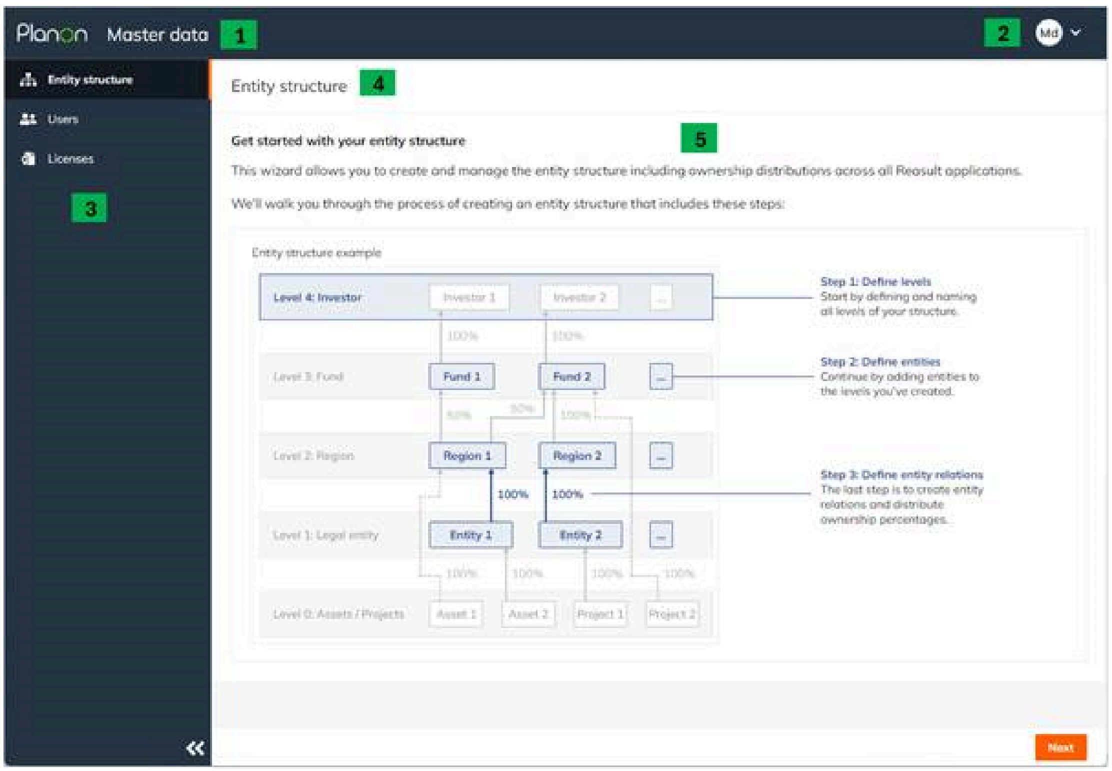
- Entity structure
- Users
- Licenses

Application overview

The Master Data application is a web-based application that is started from your browser.

The application is accessible by a user with the right credentials (user name, password) and the right user role. The user account should be a valid Microsoft account.

When opening Master data, the home screen is shown (see the following screenshot).



The home screen contains the following elements:

1. **Application header**: shows the application name.
2. **User profile**: this is where user settings are set, such as e-mail address and language. You can also find information about the version of the application in this menu. Finally, you can see your user name and log out of the application.
3. **Navigation panel**: In the navigation panel on the left of the screen, you can single-click-jump to various sections of the application. The selected section is indicated with an orange marker. The navigation panel is expandable or collapsible by clicking the arrows , or by using the <F4> key.
4. **Screen name**: is shown in the upper area.

5. Main application area

The light parts of the screen show relevant application data and functionalities.

Entity structure

The Global Administrator sets up the Enterprise Structure. He/she does this by creating 1 or more levels and indicating their hierarchy within the Enterprise. Then, 1 or more Entities are added per level.

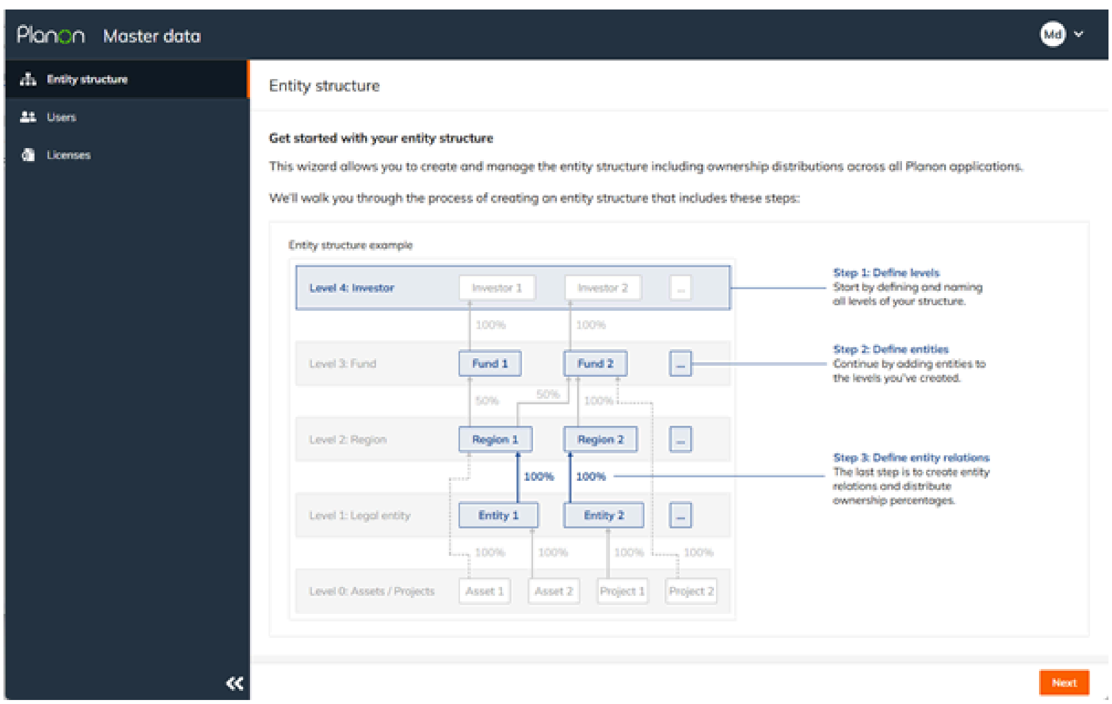
As a final step, the parent Entity(ies) and ownership percentages are recorded per Entity.

A Wizard is used to set up the Enterprise Structure, which successively takes you through the above steps. These are:

- Step 1: Define levels
- Step 2: Define entities
- Step 3: Define entity relations

These steps are explained in the following sections.

To start the Wizard, go to Entity Structure in the navigation menu. The screen below will appear (see example below).

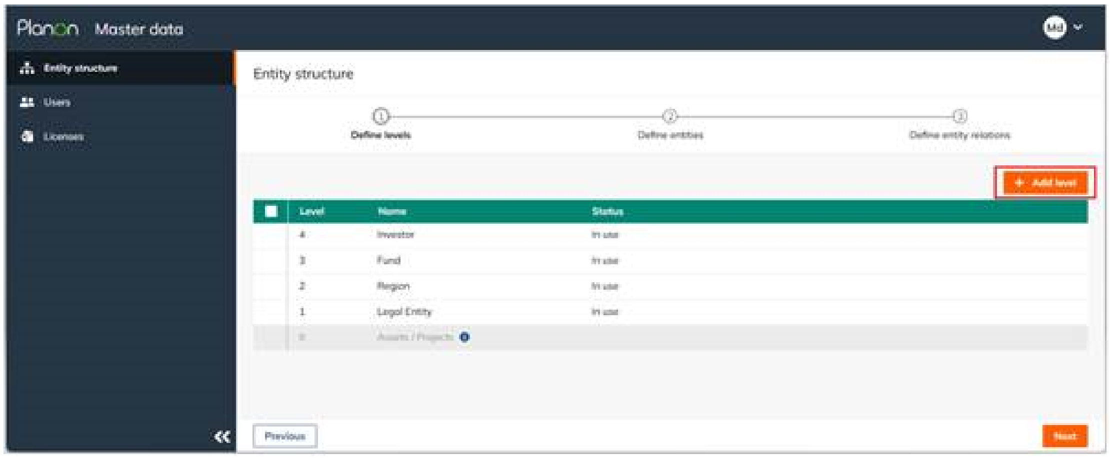


The **Next** button navigates to Step 1.

Step 1: Define levels

The **Add Level** button allows you to add a new level. If there are already 1 or more levels present, you will also be asked where the new level to be added should be placed in the hierarchy. A new level is always added with the status *Not used*.

An added level with status *Not used* can still be deleted by selecting the level and checking the check box on the left and then clicking **Delete**.



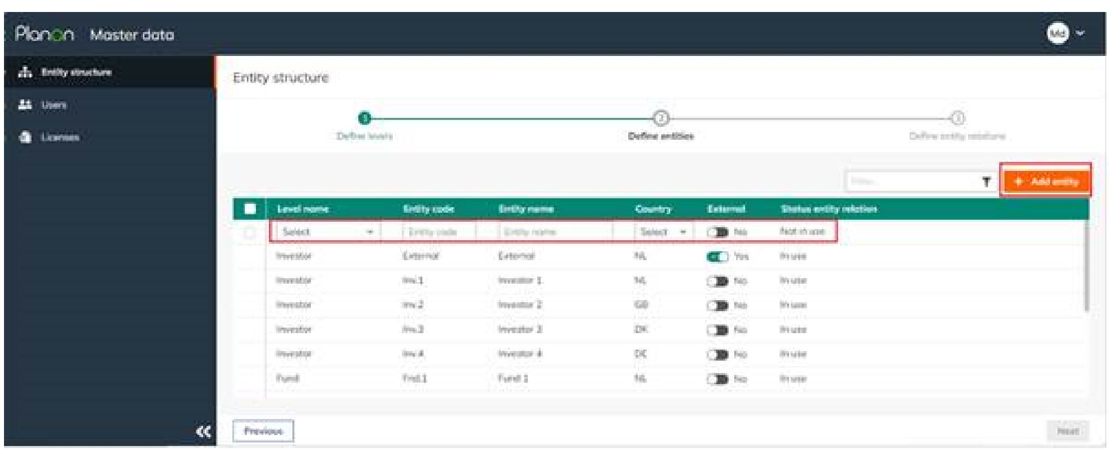
The **Next** button navigates to Step 2.

Step 2: Define Entities

With the **Add Entity** button you create a new line where you first select the level where you want to add an Entity.

Then you fill in the **Entity Code** and **Entity Name** (free fields).

Then you select the **Country** in which the Entity is located and select whether it is an internal or external Entity.



A new Entity is always added with the status *Not in use*.

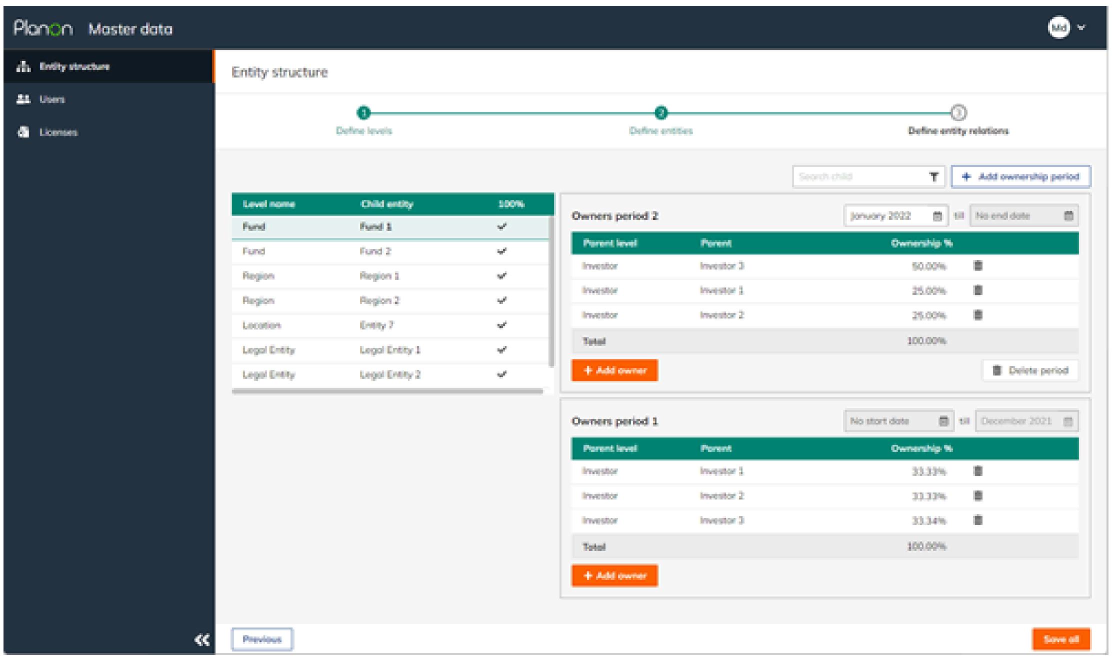
An added Entity with the status *Not in use* can still be removed by selecting the Entity row and checking the checkbox on the left and then clicking the Remove button.

After adding a new Entity, don't forget to assign User Roles for the new Entity in the various Planon applications (RE Assets and Finance).

The **Next** button navigates to Step 3.

Step 3: Define Entity relations

The final step is to record the parent Entity(ies) and associated ownership percentage for each subsidiary Entity (and for each period) (see the following example).



To do this, select the daughter entity for which you want to change the data on the left side of the screen.

Then click on the **Add owner** button. A new line will appear in which the level and the parent entity are selected in succession. The ownership percentage is then recorded (constraint: 0% ≤ ownership percentage ≤ 100.00%).

If the ownership percentage is < 100.00%, add one or more parent entities.

The input can only be saved if the total ownership percentage is equal to 100.00%.

If desired, you can specify other parent-subsidiary relations and ownership percentages per subsidiary entity per period.

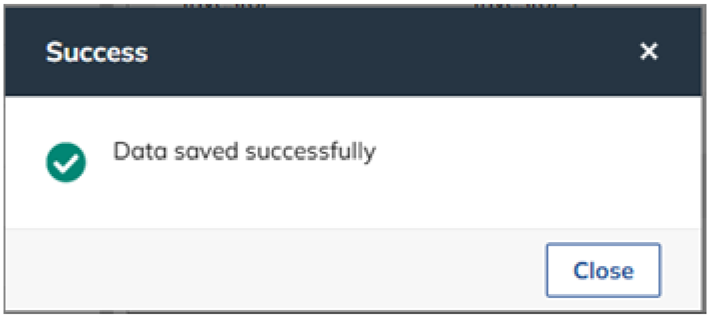
To do this, click on the **Add Ownership Period** button. An additional Ownership Period will be added to the screen. In this period, you can specify 1 or more parent entities and ownership percentages.

By entering a start period, the end period of the previous Ownership Period is automatically determined.

An added parent Entity can still be removed by selecting the Entity row and then clicking the trash can icon on the right.

The **Previous** and **Next** buttons allow you to navigate through the Wizard to correct incomplete/invalid entries.

The **Save All** button saves all changes in the Enterprise Structure. The saving is confirmed with the message below.



When saving, the status of the added Levels and added Entities will change from *Not In Use* to *In Use*.

•In an existing Enterprise Structure, a (daughter) Entity can only be deleted if the parent (Entities) are first disconnected (see Step 3). The Entity can then be deleted in Step 2.
•In an existing Enterprise Structure, a Level can only be deleted if all Entities linked to it have been deleted first (see Step 2).
•It is not possible to transfer an Entity to another Level in an existing Enterprise Structure.
•If ownership percentages are adjusted in the Enterprise Structure, this is calculated for all Entities within an open financial plan in the Finance application; this means that if underlying Entities of this financial plan have already been submitted and approved, they will again receive the status 'Open' and must be resubmitted.

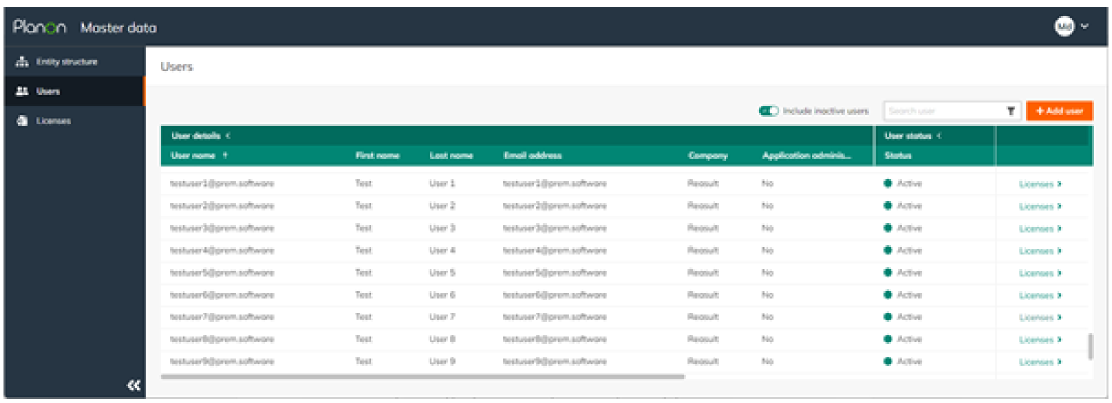
User data

The Global Administrator adds new users and defines the licenses per user.

These steps are detailed in the following sections.

Users

To add a user, go in the navigation panel to Users. The screen below will appear (see picture below).



Click the **Add user** button. A slide-in appears in which the user name needs to be defined. This user name is equal to the email address of the user. Additional fields to be filled are the first name, last name, the email address, and the company.

It is also defined here for which applications the user must have the role of Global Administrator and the user status.

If an End Date is entered for the user status that is before today's date, the status of this user changes to *Inactive*.

This means that the user can no longer login to the modules assigned to him/her.

By changing the user status end date to a date in the future or by deleting the user status end date, the user gets the status '*active*' again.

Data for an existing user can be edited by clicking on the line in the screen for the user whose data needs to be changed, after which the slide-in will open and the desired changes can be made.

The list of users can be sorted or filtered in different ways by clicking in the header of the column to be sorted/filtered and then using the icons that are then displayed.

By selecting **Show inactive users** on the screen also the inactive users are shown in the grid. It is not possible to delete a User.

Licenses

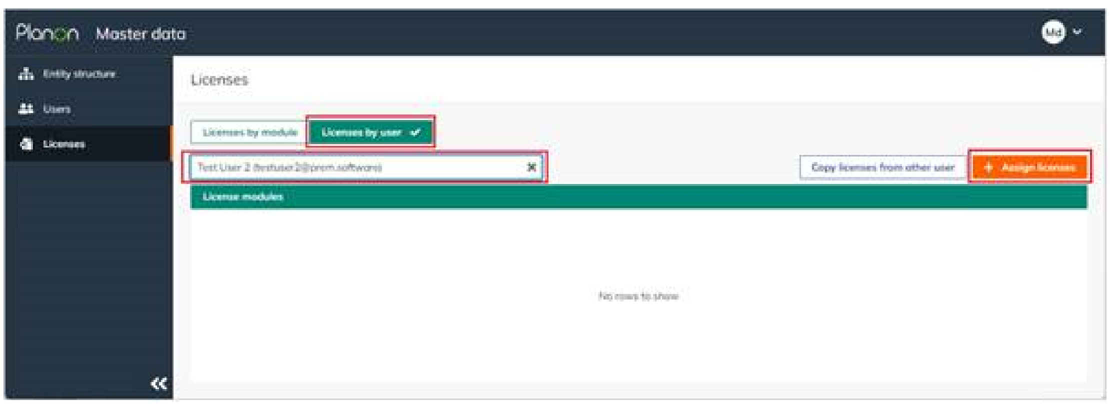
Every User needs to be assigned the correct licenses. These Licenses can be entered by Module (or).

There are two ways of setting up licenses: by User or by Module.

To do this, go in the navigation panel to Licenses.

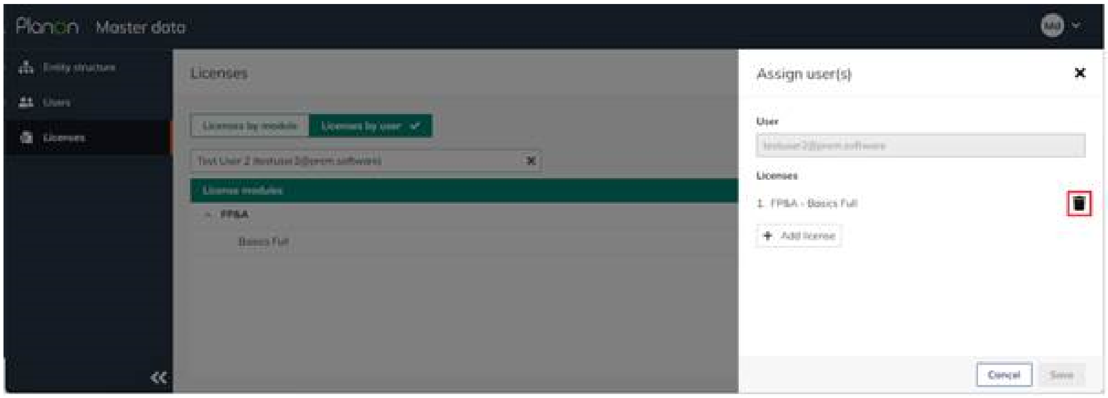
Defining Licenses by User

On the Licenses screen click the **Licenses by User** button and type the name of the user in the search box. Next add relevant licenses using the **Assign Licenses** button.



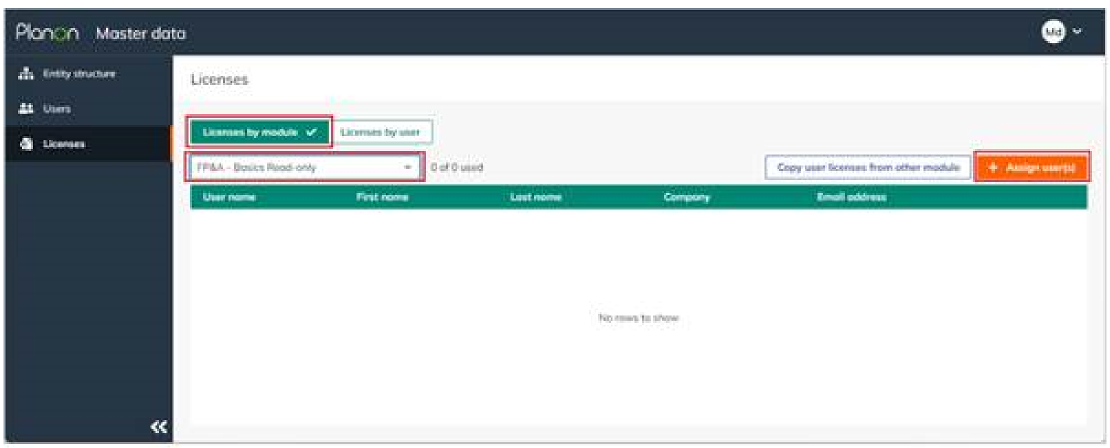
A slide-in appears in which a selection from the picklist shown can be made by clicking the **Add license** button. After saving, a new line is added to the screen in which the Licenses are shown.

Removing licenses for this user (see picture below) can be done by reopening the slide-in and clicking on the icon  in the row of the license to be removed.



Defining Licenses by Module

On the Licenses screen click the **Licenses by module** button and next select the desired License. Next add relevant users using the Assign User(s) button.



A slide-in appears in which the Users can be selected (by checking the box). After saving, the new added Users are shown in the grid.

Deleting licenses for a user can be done by reopening the slide-in and unchecking the box next to the user(s) to be removed.

Lastly, it is possible to copy the Licenses from one User to another User or from one Module to another Module.

For copying the Licenses from one User to another User: go to **Licenses**, click on the **Licenses by User** button and select the User whose Licenses should be changed. Next, click the **Copy licenses from another User** button, and select the user whose licenses should be copied.

For copying Licenses from one Module to another Module: go to **Licenses**, click on the **Licenses by Module** button and select the Module whose Licenses should be changed. Next, click on the **Copy user licenses from another module** button, and select the Module whose licenses should be copied.

During copying, existing licenses are first removed from the target user/module, next the licenses from the source user/module are copied to the target user/module.

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