Service Level Agreements

Planon Software Suite
Version: L126

Planon
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

About Service Level Agreements

The Service Level Agreements TSI plays an important role in the Integrated Services Management solution within Planon ProCenter . It enables you to create your own services and SLAs, link them to contracts and create requests/orders for completing the services required. With SLAs, it is possible to define and measure the performance of the contracted services between customers and the service provider. To measure the performance of the service delivery a set of KPIs can be defined: Time To Respond (TTR), Time To Attend (TTA), Time To Fix (TTF) and Time To Complete (TTC).

In Planon ProCenter , the configuration and preparation of the Services and the SLAs is done in these TSIs.

- Supporting data : Add Services and SLAs, including SLA search priorities.

- Contracts : Register SLAs on a service contract using the SLA contract line. You can also link SLAs to a lease contract as long as you add SLA lines to it.

- Work Orders : Link an SLA to a request or a work order to apply an SLA so that the SLA information is copied to that request/work order.

Service Level Agreements - Concepts

Service

In SLA Management, you can define services that will enable you to apply SLAs to requests and orders. The SLA service must be linked to a contract line and to an order/ request to complete a service request. SLA services are added in **Supporting data** .

Planon ProCenter allows you to add these types of services as part of an SLA.

- **Internal service** - apply to requests and move requests - for requesting parties such as departments and cost centers.
  For example; Lift not working, Replace printer cartridge, Coffee machine is empty and so on.

- **External service** - apply to work orders and move orders - for parties carrying out work such as companies and suppliers.
  For example; Repair lift, Replace printer cartridge, Refill coffee machine and so on.

  It is possible to define different SLAs within one service, based upon the reporting time. You can use this feature if you want to take different priorities into account within the same SLA service for issues reported during working hours and for issues reported after working hours. For this purpose, these concepts are used.

  ◦ Sub SLA. (For more information, see Sub SLA)

  ◦ Validity calendar

> ℹ You can add sub SLA services up to 10 levels deep.

SLA

A service level agreement (SLA) is a contract between a service provider (either internal or external) and the customer that defines the level of service to be expected from the service provider. SLAs are output-based in that their purpose is specifically to define what the customer will receive. In Planon ProCenter SLAs are used to calculate the maximum delivery time as part of service delivering. The actual delivery time is compared to the calculated maximum delivery time and the result is a service delivery within or outside the SLA agreements.

In Planon ProCenter , you can add and maintain these SLA types.

- **Internal SLAs (for internal services)** - SLA services for requesting parties within the organization. They refer to requests.
  Example: An SLA for Coffee machine is empty (low) with Time to respond – 1 hour and Time to complete – 3 hours.

- **External SLAs (for external services**) - SLA services for external parties carrying out work orders.
  Example: An SLA for Repair copy machine (high) – Time to respond 30 mins, Time to complete – 2 hours.

SLAs are used to record information such as costs and priorities to fulfill delivery KPIs based on a specific calendar for a specific service. An SLA is always searched based on various pre-set search fields.

Typically, SLAs use standard services against standard costs.
However, it is also possible to use SLAs and differentiate costs. This flexibility is useful if a different cost structure needs to be applied to a standard service.

Sub SLA

In order to define specific SLAs based upon the reporting time of the order, you can add sub SLAs under a main SLA. This is an example of servicing mechanical and electrical assets. This image is an example of an SLA service with subs specifying different service levels for different time slots.
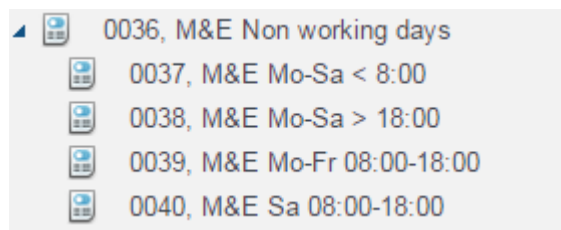
The main SLA is linked to the contract. On adding an order with a linked service the system automatically searches for an available SLA. When the SLA is determined, the system decides how to act. If sub SLAs are available, the sub SLAs are evaluated first for validity on the reporting time of the order. The reporting time is being compared to the validity period of the sub SLA. Only if none of the sub SLAs comply, the main SLA is applied.

Cost periods

A period within which an SLA is applied based on the costs defined during that period. When you define multiple cost periods, these must be consecutive periods.

An SLA can include one or more cost components, such as material costs and labor hours. These costs must be specified with respect to time, because during the term of the SLA, they can fluctuate. This is why it is important to define cost periods for each SLA. For each cost period, you can add one or more cost lines. Three types of costs can be defined:

- Actual costs (refer to Adding actual costs)

- Estimates (refer to Adding estimates)

- Labor hours (refer to Adding labor hours)

These costs will be used as a template. When linking an SLA to a contract line, the costs will be copied (Y/N) and can be overruled if needed. The costs as defined at the contract line will be copied to the order.

KPI (Key performance indicator)

It is a measurable value that demonstrates how effectively a service for an order is achieving its objectives.

In Planon ProCenter, for SLA on orders, you have the following KPIs:

- **Time to respond (TTR)** - The time required to react to an order.

- **Time to attend (TTA)** - The time required for a tradesperson to be on site to investigate/fix the problem.

- **Time to fix (TTF)** - The time required to provide a solution. The solution can be temporary or permanent.

- **Time to complete (TTC)** - The time within which the order should be completed.

> **i** TTA and TTF can be defined only for external SLAs.

The score on a KPI is calculated by comparing the time allowed (requested TTR/TTA/TTF/TTC), as defined by the priority on the SLA with the actual TTR/TTA/TTF/TTC as entered on the order.

> **i** For every KPI, the time allowed can be defined by selecting its priority in minutes/hours/days/months.

The KPIs are determined on the basis of mutual agreement by selecting a priority with an empty period. In this case, the requested KPIs can be entered manually on the order.

SLA search priorities

Information defined for searching SLAs.
Allows you to define how your organization wants to find its SLAs.

An SLA search priority is needed when defining the scope for an SLA of a contract line. It is recommended to have these priorities defined in advance, although this is not mandatory for specifying the SLA scope. The search priority is mandatory for a correct working of SLA Management. Without the priority setting, the system will not search for the SLAs at all.

You can set a search priority for each SLA type (internal and external) by specifying a combination of fields and a sequence of importance for that combination to determine which SLA should be applied.

You can define the SLA priority as follows:

- **SLA Search priority 1** - Property and Department.
- **SLA Search priority 2** - Building.

SLA scope

In Planon, an SLA scope is very specific and defines to which aspects of an organization an SLA applies. For example, Property, Department, Cost center or an combination of these.

An SLA scope is linked to an SLA contract line and an SLA. When an SLA is searched, Planon Procenter will look for a scope that matches the data entered in the order. When a unique match is found the related contract line is set and the related SLA is applied to the order.

SLA contract lines

Special contract lines which register details about an SLA.

It is possible to link the same SLA to several contracts with varying start and end dates. An SLA contract must be made for each individual contract party so that the correct SLA is applied.

Contract lines are also used to override the default SLA costs or to define the time scope for the SLA. You can also define a contract line without SLA costs and agree upon a fixed amount each year/month.

Validity calendar

The validity calendar specifies the valid dates and times for a sub SLA. The (sub) SLA is considered to be valid during the working hours of the selected validity period in the calendar.

In this example the validity period is defined for Monday, Tuesday, Wednesday, Thursday, Friday and Saturday between midnight (00:00) and 8 AM (08:00).

* Code	EARLY
* Code group	24/6Window.EARLY
Name	MO - SA 00:00 - 08:00
Top level	24/6Window, 24/6 service window

General working hours

| General start time | 00:00 |
| General end time | 08:00 |

Day type

Monday	Working day ▼
Tuesday	Working day ▼
Wednesday	Working day ▼
Thursday	Working day ▼
Friday	Working day ▼
Saturday	Working day ▼
Sunday	Non-working day ▼

SLA Management in PMFS

Planon Mobile Field Services is fully compliant with SLA Management. The actual Time to Attend (TTA), Time to Fix (TTF), 'Stop the clock' and 'Resume work' are set by the field worker based on an action in the mobile workflow. These KPIs (Key Performance Indicators) are automatically set by using the corresponding actions on the job menu.

The actions such as Start work, End work and Temporary fix must be configured in the PMFS action configuration settings.

ℹ️ For more information about configuring the actions, see Action and reason configuration (MM and PMFS) and *PMFS - Configuration Guide*.

In PMFS, the 'Stop the clock' KPI is set after the field worker selects a reason for a mobile action. This will stop the work. These actions can be **Wait**, **Pause**, **Discontinue** and **Decline EHS check**.

⚠️ TTA and TTF KPIs can only be configured for Reactive orders. There is no SLA support for Planned Preventive Maintenance (PPM) orders.

Configuring SLAs - Supporting data

In Supporting data > **Services**, you can add and maintain the internal and external services and SLAs required for your organization.

Defining SLA search priorities

Before SLA Managers start configuring SLA services, they should first find out if SLA search priorities have already been defined for your organization. If not, they can define them as described below.

In Planon ProCenter , you can assign a priority to a combination of fields when searching for SLAs. Some SLAs apply to an entire organization, whereas others apply to a specific combination of elements, such as Property and Order group.

When a priority is set, an SLA is searched in a multiple-step search sequence. If the first search step does not give a result, the second criterion is used.

The search priorities can be set for the two different types of SLA:

- Internal (requesting party) SLAs that apply only to requests
- External (party carrying out work) SLAs that apply only to work orders

Procedure

1. Go to Supporting data > SLA search priorities.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to SLA search priority fields.
4. Click Save. The SLA search priorities are set and all the defined search priorities are displayed in the element section.

Adding an internal or external service

Before configuring the SLA services, first check which SLA services already exist within your organization for both requesting parties and for parties carrying out work.

> A service can be hierarchical. A hierarchy is used to describe a set of services in a logical context.

To add an internal or an external service, follow the steps below:

Procedure

1. Go to Supporting data > Services TSI > Services selection level.

2. On the action menu, click Add Internal services or Add External services, as required.

3. In the data section, specify a Code and a Description for the service.

4. Click Save.

You have now added a service.

> ℹ️ On the **Graphical viewer** tab, the selected service is displayed graphically as a **Configuration item** with all its related assets and services.

> ℹ️ For more information on the Graphical Viewer / CI viewer, refer to *Assets > Graphical Viewer in Asset Management*.

Adding an internal or external SLA

You can add an internal or an external SLA as follows:

Procedure

1. Go to Supporting data > Services TSI > Services > Service details selection level.

2. On the action panel, click Add Internal SLA or Add External SLA.

   In the data section, complete the relevant fields. For a description of these fields, see Internal or external SLA - Fields.

3. Click Save.

> ℹ️ Use the **Link contract lines** option in the **Links** action panel to link SLAs to an SLA contract line. For details on linking SLAs to a contract line, see Adding contract lines.

Adding a sub SLA

You can define specific SLAs based on the insert moment of an order. This enables you to have different KPIs and costs for orders entered, for example, within/outside working hours.

This is done by adding sub SLAs (with a specific validity calendar) under a SLA. If the insert moment of the order is within working hours of the sub SLA's validity calendar, then the sub SLA will be applied, else the main SLA will be applied.

> ℹ️ The insert moment of the order/request is taken from the **Reported on** date-time of the order or by the **Planned Begin Date Time** in case of an order generated by the Service planner. If the **Original reporting date-time** is specified, this date-time will be used as insert moment.

Prerequisite

The calendar used to determine the validity of the sub SLA must be defined first.

> ℹ️ For more information on configuring calendars, see System settings > Configuring calendars.

Procedure

1. Go to Supporting data > Services TSI > Services > Service details selection level.
2. On the action panel, click Add sub.
3. Complete the fields in the data section, refer to Internal or external SLA - Fields.
4. Click Save. You have now added a sub SLA.

Sub SLAs do not need to be linked to a contract line, nor is it necessary to define specific scopes for the sub SLA. The contract line and scope of main SLA are applied to the sub.

Linking contract line(s) to SLAs

As an SLA Manager, you can link contract lines to an SLA, so that the SLAs are available on the contract line at the time of assigning the service.

The internal contract lines must be linked to the internal SLAs which will then be linked to requests in the Work Orders TSI.
Similarly, the external contract lines must be linked to the external SLAs, which will then be linked to orders in the Work Orders TSI.

Procedure

1. Go to Addresses > Contract details > Contract lines.
2. Select a contract line to which you want to link an SLA.
3. On the action panel, click Link SLA.
4. Select the relevant option for filtering the SLAs - Display all SLAs, Display internal SLAs, Display external SLAs.
5. Move the relevant SLAs you want to link to In use.
6. Click OK.
7. Click Save. The contract lines are now linked the selected SLA.

Defining cost periods and costs

You can define the cost periods as follows:

Adding cost periods

You can add cost periods as follows:

Procedure

1. Go to Supporting data > **Services** > **SLA Details** > **Cost periods**.
2. On the action panel, click **Add**.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Cost periods fields.
4. Click **Save**.

Adding estimates

You can also enter estimated costs for an SLA. Several estimates can be linked, but only one estimate is actually used in subsequent calculations. You can specify which estimate should be used in the **Active estimate** field.
This enables users to create and maintain records of cost estimates per SLA so as to plan for budget needs.

Procedure

1. Go to Supporting data > **Services** > **SLA Details** > **Cost details** > **Estimates**.
2. On the action panel, click **Add**.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Estimates fields.
4. Click **Save**. The cost estimates are added to the SLA.

Adding actual costs

For the actual costs of an SLA, all the defined costs are added as actual costs to the order on applying an SLA service.

Procedure

1. Go to Supporting data > **Services** > **SLA Details** > **Cost details** > **Actual costs**.
2. On the action panel, click **Add**.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Actual costs fields.
4. Click **Save**.

Adding labor hours

For recording labor hours of an SLA, the defined labor hours are added as actual labor hours to the order on applying an SLA service.

1. Go to Supporting data > **Services** > **SLA Details** > **Cost details** > **Labor hours**.
2. On the action panel, click **Add**.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Labor hours fields.
4. Click **Save**. The labor hours estimation is added to the SLA.

Importing standard requests

To create SLAs for internal services (requests), you can import all standard requests to the **Services** elements list. These standard requests can also be used as internal SLA services. This is a once-only action when you start configuring SLAs.

Procedure

1. Go to Services.
2. On the action menu, click Import standard requests. An alert appears, specifying the number of standard requests that will be imported during this action.
3. Click Proceed.
4. Click Refresh list on the toolbar in order to view the imported standard requests.

   You have now imported standard requests.

Importing standard work orders

To create SLAs for external services (work orders), you can import all standard work orders to the **Services** elements list. These standard work orders can also be used as external SLA services.

Procedure

1. Go to Services.
2. On the action menu, click Import standard work orders. An alert appears, specifying the number of standard work orders that will be imported during this action.
3. Click Proceed.
4. Click Refresh list on the toolbar in order to view the imported standard work orders.

   You have now imported standard work orders.

Preparing SLAs - Contracts

In Contracts , you can link SLAs to a contract.

Adding SLA contract lines

You can create an SLA contract line using the following procedure.

Procedure

1. Go to Contract Management > Contracts.
2. Select the service contract for which you want to create SLA contract line(s). You can also use this for lease contracts.
3. Go to Contract details.
4. On the action menu, click Add SLA contract lines.
5. In the data section, complete the relevant fields. For a description of these fields, refer to Contract Management > Contract line data.
6. However, for an SLA contract line, complete the Internal SLA (Y/N) field. This Yes/No field enables you to specify if the SLA is internal or external.
7. Click Save. An SLA contract line is added to the contract.
8. To link SLAs of type internal/external to the SLA contract line, on the action menu, click Link SLAs. You can only link SLAs of the correct type.
9. Move the internal/external SLAs to the In use section.

   You can view the linked contract lines at **Contract line details** > **Linked SLAs**.

> **i** If you copy cost details of the SLA, you can still specify your own costs at **SLA scopes & activities level** > **SLA contract line costs**. When costs are specified here, they will be applied rather than the costs specified at the SLA. Alternatively, you can use the amounts per year.

Copying SLA cost lines

To easily take over costs that have been already defined earlier.

Procedure

1. In Contracts, select a contract line to which you want to copy contract line costs.
2. Go to **SLA scopes & activities** > **SLA contract line costs** and select a contract line.
3. On the action panel, click **Copy cost to**.

    The **Copy costs to** dialog box appears.
4. From the list, select the relevant contract cost lines and click **OK**. The new contract line costs are added to the **SLA contract line costs** list.

Applying SLA costs

Typically, SLAs are used to apply standard services against standard costs. For enhanced flexibility it is possible to use SLAs and differentiate costs so that a different cost structure can be applied to a standard service.

Example

Consider servicing an air conditioning unit on the ground floor versus one on the 20th floor in a building with elevators going up to the 15th floor only.
It takes considerably more effort to service this equipment on the 20th floor. Consequently, this results in extra costs that need to be reflected in the invoice.

In Planon ProCenter , this can be done as follows:

Procedure

1. Create a contract (CNTR) with two contract lines.
2. Link an SLA (SLA1) to these lines.

- Do not specify costs for the first SLA contract line (case 1)
- Specify costs for the second SLA contract line (case 2)

	SLA Contract line	Copy costs	SLA Cost line	Scope	Priority	Costs	Charged
Case 1	1	No	No	1	1 hour	€100	€100
Case 2	2	No	€125	2	1 hour	€100	€125

Based on the scope, the Contract / SLA contract line will be found.

- In case 1, no SLA costs are copied to the SLA contract line. The SLA costs will be derived as defined in **Supporting data** .

> For more information, refer to Supporting data .

- In case 2, SLA costs are specified for €125 at SLA contract line costs > SLA scopes & activities. These costs will be charged against the service provided.

Aggregating contract line costs

It is possible to aggregate contract line costs based on a number of field specifications. You can achieve this for contract lines in consecutive periods or in identical periods.

Aggregating contract line costs using consecutive periods

For consecutive periods, cost lines with identical **Code** and **Description** fields are displayed as a single cost line with multiple life cycles.

Procedure

In **Supporting data**

1. Create an SLA service (internal or external) and specify its costs.
2. On **SLA details** level, specify the cost periods.
3. Select a cost period and go to the **Cost details** level.
4. Specify Actual costs, Estimates, Labor hour costs.

> ℹ For the actual costs, verify that the **Code** and **Description** fields are identical for all cost periods.

	Start date	End date	Amount
Actual costs 1	1-1-2006	31-12-2006	450
Actual costs 2	1-1-2007	31-12-2007	500
Actual costs 3	1-1-2008	31-12-2008	550
Actual costs 4	1-1-2009	31-12-2011	600

In **Contract Management**

1. Link this SLA to the SLA contract line.
2. On Addresses , select a contract.
3. Go to Contract details > Contract lines and add or select a contract line.
4. On the action panel, click **Link SLAs** and select the relevant SLA from the list and move it to **In use**.
5. Select the contract line, and go to SLA scopes and activities > SLA contract lines costs > to view the cost details.

   Here, these cost lines corresponding with the cost types appear. Actual costs, Estimates and Labor hour costs.
6. Select a single cost line and go to **Contract activity details**.

7. At the **SLA Contract line costs – life cycles**, the cost lines life cycle records appear.

> ℹ The life cycles displayed correspond with the cost periods specified in **Supporting data** .

Aggregating contract line costs using identical periods

If there are multiple SLA costs of the same type in an identical period and the following fields contain identical values, the costs linked to these contract lines will be joined together in a single life cycle.

- SLA contract line costs
- Code
- Description
- VAT tariff
- Standard cost category
- Standard cost type
- Discount/Surcharge %
- **For example:**

	SLA contract line costs	Code	Description	VAT tariff	Standard cost category	Standard cost type	Discount/Surcharge %		
Costs 1	COSTS	x	x	x	x	x	x	500	850
Costs 2	COSTS	x	x	x	x	x	x	350	
Costs 3	COSTS	x	x	x	x	x		250	250
Costs 4	ESTIMATE	x	x	x	x			250	650
Costs 5	ESTIMATE	x	x	x	x			400	
Costs 6	HOURS	x	x	x	x	y		450	950
Costs 7	HOURS	x	x	x	x	y		500	

Seven SLA cost lines will result in four life cycle records.

> ℹ Because one field is different, "Costs 3" is not merged with the preceding costs.

Adding SLA scope records

If you link SLA scopes to an SLA contract line specify to which aspects of an organization an SLA applies.

Procedure

1. Go to Addresses > Contracts > Contract details > Contract lines.
2. Select the SLA contract line to which you want to link one or more SLA scopes.
3. Go to SLA scopes & activities > SLA scopes.
4. On the action panel, click Add. In the dialog box, select the contract line to which the SLA scope must be linked.
5. In the data section, complete the relevant fields. For a description of these fields, refer to SLA scope fields.
6. Complete the scope fields as you want to set the scope for search on the contract lines.

   For example: the SLA is an 'Emergency call' with a Response and Completion time as 'Immediate'. The SLA scope can, for example, be linked to the **Asset** 'airco unit' in **Space type** 'server room'.

7. Click Save. An SLA scope is created for the selected SLA contract line.

> ℹ The search for SLAs only works correctly if no duplicate SLA scopes are defined on the contract. Use the **SLA scope analysis** system report to check for duplicate scope records. You can access the **SLA scope analysis** system report on the **Contract lines** step by clicking **Report** on the action menu.

Copying an SLA scope

To avoid repetitive work, you can add an SLA scope to multiple SLAs or contract lines by copying it to an SLA contract line combination.

Procedure

1. In Addresses , go to **SLA scopes**.
2. Select the SLA scope to copy.
3. Click **Copy to**.

> ℹ In order to copy multiple SLA scopes to multiple contract line combinations, select the SLA scopes to copy and on the **Edit** menu, click **Action on selection** > **Copy to**.

4. In the dialog box select the SLA-contract line combination to which you want to copy the selected SLA scope.
5. Click **OK**.
6. You have now copied an SLA scope to the selected SLA-contract line combinations.

> ⚠ The selected scope is not copied if an equal scope has already been defined for the destination SLA-contract line combination. To view double scope records per SLA service, go to **Contract line details** > **Contract lines - life cycle**. On the action menu, click **Report** to view **SLA Scope Analysis**.

Retrieving services and SLAs

The **Addresses** > **SLA overview** TSI allows you to easily retrieve the services and SLAs that are available for a specific property, department, order group etc.

Procedure

1. Start **Addresses** > SLA overview.
2. Drill down from the relevant selection levels or steps. For example, you want an overview of the SLAs for a specific property in combination with an order group.
3. At Properties, select the property for which you want an overview of SLAs.
4. Move to SLA filters > Order groups.
5. Select the order group you want to use as filter.
6. Go to Service Level Agreements .
   The elements list displays the SLAs whose SLA scope contains the property and the order group you selected.

   Repeat this with other combinations and filters available on the layout.

ℹ️ At the **SLA scopes** selection level, you can use a filter to further refine your search. It is very important to find out whether the scope is correctly defined or no double scopes are defined.

ℹ️ For details on creating and using filters, see Fundamentals .

Working with SLAs – Work Orders

In Planon ProCenter you can create requests and orders to handle internal and external service requests.

Internal SLAs can be applied to regular service requests and move requests. External SLAs can be applied to work orders and move orders.

> ℹ️ For information on creating a generic order/request, refer to Work Orders .

Prerequisites:

Before you are able to create an order/request with an SLA, check whether you have completed the following configuration and preparation of SLA services:

1. Supporting data
   1. Create Services (internal/external).
   2. Create SLAs (internal/external).
   3. Add SLA costs (optional).
   4. Add SLA search priorities.

2. Contracts
   1. Create a Service contract.
   2. Define SLA contract line(s) with the correct contract period.
   3. Link SLA(s) to SLA contract lines
   4. Define SLA scope records.
   5. Change the contract status from **In preparation** to **Active**.

Applying SLAs to requests/orders

As a service desk employee, you can create a request / order to which an SLA applies.

> ⚠️ If you want an order to be processed according to an SLA, the corresponding SLA service must be **Active** and entered on the order / request.

1. In Work Orders , you create an order / request and select an SLA service.

> ℹ️ Requests / orders can also be created in **Service Desk** or **Planon Self-Service**.

On selecting an SLA service, there is a two-fold search procedure to find and apply SLAs to requests / move requests / work orders / move orders.

- ○ Finding an applicable SLA
- ○ Finding an applicable (sub)SLA

2. Click Save. An order / request with SLA is created.

> ⚠ If the service or any of the scope related fields is changed, the system will again search for an applicable SLA.

Finding an applicable SLA

A valid SLA is selected based on the order data, using the search priorities and scope that are defined for the SLA. The search process searches for a unique match within the defined SLA scopes.

Hierarchical search

It is also possible to search hierarchically on specific fields, such as **Asset**, **Asset group**, **Department**, **Property** and **Order group**.

> ℹ In **Field definer** > **SLA search priorities** > **Business object settings**, application managers can select the fields on which you can perform a hierarchical search for an SLA.

This image is an example showing the search

SLA Search priority

Property	Order group	Department	Asset group	Asset

**NOTE: Sequence of fields specifies their order in Search priority.

Work Order

100.00	P1	W1.1.1	D1.1	AG1.1	A1.1.1

SLA Scopes

SLA Scope	Property	Order group	Department	Asset group	Asset
Scope 1	P1	W1.1	D1	AG1	A1
Scope 2	P1	W1.1	D1.1	AG1.1	A1.1.1
Scope 3	P1	W1.1	D1.1	AG1.1	A1.1
Scope 4	P1	W1.1	D1.1	AG1	A1
Scope 5	P1	W1	D1	AG1	A1.1
Scope 6	P1.1.1	W1.2	D1.3	AG2	A2
Scope 7	P2	W2	D2	AG2	A2.1

Hierarchy of Business objects

PROPERTIES	WORKORDER GROUPS	DEPARTMENTS	ASSET GROUPS	ASSETS
P1	W1	D1	AG1	A1
P1.1	W1.1	D1.1	AG1.1	A1.1
P1.1.1		D1.1.1	AG1.1.1	A1.1.1
P1.1.2	W2	D1.2		A2
P2	W2.1	D1.3	AG2	A2.1
		D2		

process.

In the above example, based on the hierarchical search and values entered on the order, **Scope 2** will be applied to the order.

During the search the following points are taken into account:

- The order of the search fields from Supporting data > SLA Search Priorities determines the sequence in which SLA scopes are applied.

- For SLA search priority fields, matching SLA scope(s) are found via a hierarchical search from bottom level to top level.

- If the search results in multiple SLA scopes, it will count as 'no SLA scope found'.

- The search for a unique SLA ends as soon as a unique SLA scope is found.

- The number of fields defined in the SLA scope must exactly match the number of fields defined on the contract line.

Finding an applicable (sub)SLA

If a unique SLA is found, then a subsequent search is performed to see if there is a specific (sub) SLA that is valid on the insert moment of the request/order.

- If a unique sub SLA is found, this sub SLA will be considered and applied.

- If no unique sub SLA is found or no sub SLAs have been defined at all, the parent SLA will be considered and applied.

- The SLA related fields on the order such as SLA, Contract line, Weighting are set. For field information, refer to SLA related fields on request/order.

- The requested TTR/TTA/TTF/TTC of the order will be calculated based on the SLA found.

- The costs, labor hours and estimates as defined on the contract line or SLA are copied to the order.

> Finding SLAs based on the insert moment is not supported for suborders under reservations and suborders under planned maintenance orders.

> The insert moment of the order/request is taken from the **Reported on** date-time of the order or by the **Planned Begin Date Time** in case of an order generated by the Service planner. If the **Original reporting date-time** is specified, this date-time will be used as insert moment.

> If no unique SLA is found, the order/request can still be saved. To prevent the saving of order without an unique SLA, the setting **Accept request with Valid SLAs only** can be set to **Yes** in Field definer > **Order settings** > **Orders BO**. Note that this only applies to Requests and Move requests.

Setting an order in Wait status

Wait status enables you to stop the clock when an order is stopped mid way. This prevents the impact of waiting time on the SLA score defined on the order/request. The clock will resume, when the order is moved back to another status (which is not a wait status).

Prerequisite

At least one status is configured as Wait status via the link **SLA: Wait statuses**.

Procedure

1. In Service Manager, create an order/request that has an SLA.

2. If you change the order's status to a status that is defined as a wait status, the date-time will be populated in the Waiting since field.

3. You can resume the order by changing to a status that is not defined as a wait status. This will start the time for the SLA.

4. The waiting time is calculated by taking the difference between the time when the order is resumed and the Waiting since date-time.

   Depending on the order's priority, the waiting time is calculated in:

   ◦ Working minutes, where period of priority is in hours/days.

   ◦ Clock minutes, where period of priority is in minutes/weeks/months/years/ undefined.

> ℹ️ If the actual time to respond/attend/fix/complete has already been entered (that is, the order has already been responded/attended/fixed/completed) and the order is set to wait afterwards, the waiting time will not affect the corresponding requested time to respond/attend/fix/complete.

5. The waiting time as determined in the previous step is added to the Requested time to respond/attend/fix/complete so that the SLA score is not impacted.

   The waiting time is also added to the Total waiting time for respond/attend/fix/complete.

> ⚠️ The Actual time to respond/attend/fix/complete cannot be entered/modified when an order is in wait status.

Assigning an 'Actual' status to an order

The 'Actual' TTR/TTA/TTF/TTC KPIs can be entered manually on an order, but it is also possible to have these set automatically by defining specific (user) statuses per KPI that implement the actual KPI.

> ℹ️ For more information on KPI, see KPI (Key performance indicator).

Prerequisite

Your Planon administrator has configured at least one status as 'Actual' KPI status.

> ℹ️ For more information on configuring 'Actual' KPI statuses for SLAs, see Field definer > SLA settings.

Procedure

1. In Work Orders , create an order or request with an SLA.

2. If you change the order's status to a status that has been defined as 'Actual' status, the date-time is populated in the respective 'Actual' KPI field.

> ℹ The 'Actual' KPIs are only updated when the respective fields are empty.

> ℹ Setting the actual Time to Attend will update the actual Time to Respond (if empty). Similarly, setting the actual Time to Fix will update the actual Time to Attend (if empty) and the actual Time to Complete will update the actual Time to Fix (if empty).

Example of a complex SLA scenario

This example is about configuring a complex SLA scenario for companies working with flexible business hours. In this scenario, the service window to execute orders has been set to 24 hours / 6 days a week, while Sundays and holidays are defined as non-working days. Different priorities have been defined for problems reported within the specified reporting hours.

Reporting day	Reporting hours	Priority (KPI)	Calendar used to resolve problem
Monday – Friday (= main calendar)	08:00 – 18:00	TTR = 2 hours TTC = 4 hours	All calls submitted within this timeframe will be resolved in a 24/6 service window (24 hours during 6 days,except Sundays)
Monday – Saturday	00:00 – 08:00 18:00 – 24:00	TTR = 4 hours TTC = 8 hours	All calls submitted within this timeframe will be resolved in a 24/6 service window
Saturday	08:00 – 18:00	TTR = 6 hours TTC = 12 hours	All calls submitted within this timeframe will be resolved in a 24/6 service window

Reporting day	Reporting hours	Priority (KPI)	Calendar used to resolve problem
Sunday	00:00 – 24:00	TTR = 2 hours TTC = 4 hours	Calls submitted on Sundays will be resolved on the basis of the main calendar (Mo – Fr 08:00 – 18:00).
General bank holidays like 1st January (New Year) 25th/26th December (Christmas)	00:00 – 24:00	TTR = 2 hours TTC = 4 hours	Each call on a public / national holiday will be resolved on the basis of the main calendar.
Regional holidays (depends per property)	00:00 – 24:00	TTR = 2 hours TTC = 4 hours	Each call on a regional holiday will be resolved on the basis of the main calendar.
Regional shopping days on agreed Sundays and/or holidays	08:00 – 18:00	TTR = 6 hours TTC = 12 hours	All calls submitted within this timeframe will be resolved during opening hours. If this is not possible, the main calendar is taken into account.

Scenario for calendar configuration

The proper configuration of SLA functionality depends strongly on the definition of calendars. In this scenario, a simple and straightforward configuration of the calendars will create a calendar for each defined reporting period and service window. However, it is possible to configure the calendars in a different way to achieve the same result.

As can be deduced from the table in Example of a complex SLA scenario:

- you need the following calendars for execution of the order
  - Calendar for the 24/6 service window
  - Mo-Fri 8:00 – 18:00 (main calendar)
- you need the following calendars for finding the correct SLA
  - Mo-Fri 8:00 – 18:00
  - Sat 8:00 – 18:00
  - Mo-Sat 0:00 - 8:00, 18:00-24:00
  - Sun 0:00-24:00 & general bank holidays

> **i** For more information on the configuration of calendars, see Configuring calendars.

The calendar structure can be defined as follows:
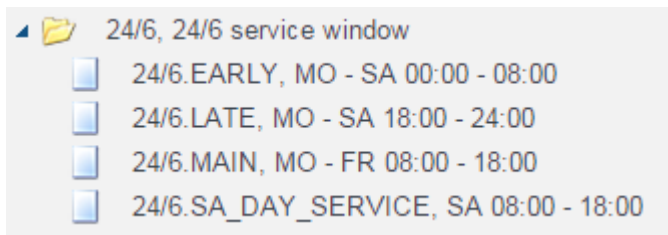
> **i** If you define sub calendars, you only need to define deviations from the main calendar. In this example all values have been filled for reasons of clarity.

Configuration of 24/6 SLA calendar

1. **24/6 (00:00 – 00:00)** - This calendar defines the business hours which are valid for SLA execution. Due to the fact that calls reported in valid SLA time frame will be resolved in a 24/6 service window, there is a need to define a 24/6 service calendar. This calendar represents the 24/6 service.

General	Audit info

* Code	24/6
* Code group	24/6
Name	24/6 Service window
Top level	

General working hours

| General start time | 00:00 |
| General end time | 00:00 |

Type of day

Monday	Working day
Tuesday	Working day
Wednesday	Working day
Thursday	Working day
Friday	Working day
Saturday	Working day
Sunday	Non-working day

In the 24/6 service calendar (the top node in this example) *deviating dates* are defined for bank holidays. Select the calendar and drill down to the **Special dates** level. The bank holidays are defined as *non-working* days. Due to the fact that these bank holidays are defined on a higher level in the calendar structure, they are inherited to the calendars on lower levels. As a result, the *general bank holidays* are also valid for all calenders defined on a lower level in the calendar.

Date of calendar
☑ Deviating dates (3)
☐ 30/10/2024
☐ 31/10/2024
☐ 01/11/2024

2. **Main: Monday – Friday (08:00 – 18:00)** - This calendar defines the reporting period from Mondays until Fridays during normal business hours. We need this calendar due to the fact that calls reported within this timeframe are executed with the highest priority. Besides this, this calendar is also

used to execute calls reported on *non-working* days. In that case this calendar will be applied to calculate the requested SLA date/times.

* Code	MAIN
* Code group	24/6.MAIN
Name	MO - FR 08:00 - 18:00
Top level	24/6, 24/6 Service window

General working hours

General start time	08:00
General end time	18:00

Type of day

Monday	Working day
Tuesday	Working day
Wednesday	Working day
Thursday	Working day
Friday	Working day
Saturday	Non-working day
Sunday	Non-working day

3. **Early: Monday – Saturday (00:00 – 08:00)** - This calendar defines the reporting period from Mondays until Saturdays during early shift (00:00 – 08:00). We need this calendar to be able to act on calls reported in the early shift.

* Code	EARLY
* Code group	24/6.EARLY
Name	MO - SA 00:00 - 08:00
Top level	24/6, 24/6 Service window

General working hours

General start time	00:00
General end time	08:00

Type of day

Monday	Working day
Tuesday	Working day
Wednesday	Working day
Thursday	Working day
Friday	Working day
Saturday	Working day
Sunday	Non-working day

4. **Late: Monday – Saturday (18:00 – 00:00)** - This calendar defines the reporting period from Mondays until Saturdays during late shift (18:00 – 00:00). We need this calendar to be able to act on calls reported in the late shift.

* Code	LATE
* Code group	24/6.LATE
Name	MO - SA 18:00 - 00:00
Top level	24/6, 24/6 Service window

General working hours

General start time	18:00
General end time	00:00

Type of day

Monday	Working day
Tuesday	Working day
Wednesday	Working day
Thursday	Working day
Friday	Working day
Saturday	Working day
Sunday	Non-working day

5. **Saturday (18:00 – 00:00)** - This calendar defines the reporting period for Saturdays only during normal business hours. We need this calendar due to the fact that calls reported within this timeframe are executed with a different priority.

* Code	SA_DAY_SERVICE
* Code group	24/6.SA_DAY_SERVICE
Name	SA 08:00 - 18:00
Top level	24/6, 24/6 Service window

General working hours

General start time	08:00
General end time	18:00

Type of day

Monday	Non-working day	⌄
Tuesday	Non-working day	⌄
Wednesday	Non-working day	⌄
Thursday	Non-working day	⌄
Friday	Non-working day	⌄
Saturday	Working day	⌄
Sunday	Non-working day	⌄

Configuration of 24/6 SLAs

This example provides a simple and straightforward 24/6 SLA configuration with sub SLAs for the agreed reporting times. The main SLA (top level) contains the SLA agreements for problems reported on non-working days.

```
▲ 🖳  0036, M&E Non working days
   🖳    0037, M&E Mo-Sa < 8:00
   🖳    0038, M&E Mo-Sa > 18:00
   🖳    0039, M&E Mo-Fr 08:00-18:00
   🖳    0040, M&E Sa 08:00-18:00
```
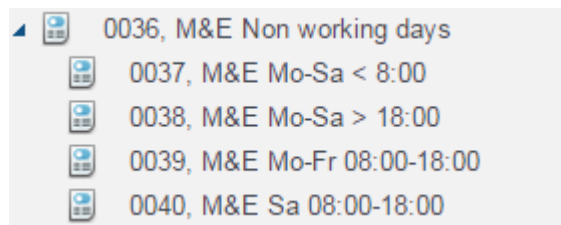
1. **(0036) M&E Non-working days** - this SLA service will handle *all* calls reported on *non-working* days. For these calls the service window will be applied against normal business hours: Monday until Friday between 08:00 and 18:00. Therefore the calendar which represents normal business hours is linked as the SLA calendar. Due to the fact that the service window starts

during normal business hours, the highest priority is attached to this SLA, to get a reasonable TTR, TTA, TTF and TTC.

General

* Code	0036
* Description	M&E Non working days
* SLA service	M&E, Mechanical & electrical assets
Main SLA service	

Priorities

Time to respond	FM-H2, Within 2 hours
Time to attend	
Time to fix	
* Time to complete	FM-H4, Within 4 hours

Calendar

* Calendar selection	2, Calendar for SLAs
SLA calendar	24/6.MAIN, MO - FR 08:00 - 18:00
Validity	

Weighting

| Weighting | |

2. **(0037) M&E Mo – Sa < 8:00** - this sub SLA service handles *all* calls reported on Mondays until Saturdays during the *early* shift (00:00 – 08:00). Therefore the calendar which represents the early shift is linked to the *validity* period. For calls reported in this timeframe the 24/6 service window will be applied. That is the reason that the SLA calendar for 24/6 services is linked as SLA calendar.

General

* Code	0037
* Description	M&E Mo-Sa < 8:00
* SLA service	M&E, Mechanical & electrical assets
Main SLA service	0036, M&E Non working days

Priorities

Time to respond	FM-H4, Within 4 hours
Time to attend	
Time to fix	
* Time to complete	FM-H8, Within 8 hours

Calendar

* Calendar selection	2, Calendar for SLAs
SLA calendar	24/6, 24/6 service window
Validity	24/6.EARLY, MO - SA 00:00 - 08:00

Weighting

Weighting	

3. **(0038) M&E Mo – Sa > 18:00** - this sub SLA service handles *all* calls reported on Mondays until Saturdays during the late shift (18:00 – 24:00). Therefore the calendar which represents the late shift is linked to the *validity* period. For calls reported in this timeframe the 24/6 service window will be applied. That is the reason that the SLA calendar for 24/6 services is linked as SLA calendar.

General

* Code	0038
* Description	M&E Mo-Sa > 18:00
* SLA service	M&E, Mechanical & electrical assets
Main SLA service	0036, M&E Non working days

Priorities

Time to respond	FM-H4, Within 4 hours
Time to attend	
Time to fix	
* Time to complete	FM-H8, Within 8 hours

Calendar

* Calendar selection	2, Calendar for SLAs
SLA calendar	24/6, 24/6 service window
Validity	24/6.LATE, MO - SA 18:00 - 24:00

Weighting

Weighting	

4. **(0039) M&E Mo – Fr 08:00 - 18:00** - this sub SLA service handles *all* calls reported on Mondays until Fridays during *normal* business hours (08:00 – 18:00). Therefore the calendar which represents the normal business hours is linked to the *validity* period. For calls reported in this timeframe the 24/6 service window will be applied. That is the reason that the SLA calendar for 24/6 services is linked as SLA calendar.

General

* Code	0039
* Description	M&E Mo-Fr 08:00-18:00
* SLA service	M&E, Mechanical & electrical assets
Main SLA service	0036, M&E Non working days

Priorities

Time to respond	FM-H2, Within 2 hours
Time to attend	
Time to fix	
* Time to complete	FM-H4, Within 4 hours

Calendar

* Calendar selection	2, Calendar for SLAs
SLA calendar	24/6, 24/6 service window
Validity	24/6.MAIN, MO - FR 08:00 - 18:00

Weighting

Weighting	

5. **(0040) M&E Sa 08:00 - 18:00** - this sub SLA service handles *all* calls reported on Saturdays during *normal* business hours (08:00 – 18:00). Therefore the calendar which represents the normal business hours on Saturday is linked to the *validity* period. For calls reported in this timeframe the 24/6 service window will be applied. That is the reason that the SLA calendar for 24/6 services is linked as SLA calendar.

General

* Code	0040
* Description	M&E Sa 08:00-18:00
* SLA service	M&E, Mechanical & electrical assets
Main SLA service	0036, M&E Non working days

Priorities

Time to respond	FM-H6, Within 6 hours
Time to attend	
Time to fix	
* Time to complete	FM-H12, Within 12 hours

Calendar

* Calendar selection	2, Calendar for SLAs
SLA calendar	24/6, 24/6 service window
Validity	24/6.SA_DAY_SERVICE, SA 08:00 - 18:00

Weighting

Weighting	

Outcome of configuration scenario

The following table displays the outcome of the calendar and SLA configuration from this scenario.

Order reported on	Requested TTR- (Time to respond)	Requested TTC- (Time to complete)	Remarks
Monday 14:00	Monday 16:00	Monday 18:00	
Monday 22:00	Tuesday 02:00	Tuesday 06:00	
Friday 17:30	Friday 19:30	Friday 21:30	

Order reported on	Requested TTR- (Time to respond)	Requested TTC- (Time to complete)	Remarks
Saturday 11:15	Saturday 17:15	Saturday 23:15	
Saturday 16:15	Saturday 22:15	Monday 04:15	TTC is skipped to Monday, due to the fact that Sunday is generally a non-working day. Due to fact that the call is reported on Saturday the 24/6 calendar for TTC calculation only Sunday will be skipped.
Saturday 22:00	Monday 02:00	Monday 06:00	TTR and TTC are skipped to Monday, due to the fact that Sunday is generally defined as a non-working day. Due to 24/6 calendar for TTC calculation only Sunday will be skipped.
Sunday 11:45	Monday 10:00	Monday12:00	Sunday is a non-working day, so TTR and TTC are calculated by applying the main calendar. The main calendar is defined for Monday until Friday between 08:00 and 18:00.
Friday 25th December 12:00 (Christmas Day)	Monday 10:00	Monday12:00	Friday 25th December and Saturday 26th December are defined as bank holidays (Christmas days). Bank holidays are configured as a non-working day. Sundays are also defined as non-working days, so TTR and TTC are calculated by applying the main calendar.
Thursday 24th December 22:00 (Christmas Eve)	Monday 02:00	Monday 06:00	TTR and TTC are skipped to Monday, due to the fact that Friday 25th December and Saturday 26th December are defined as bank holidays. Bank holidays are configured as non-working days. Sunday

Outcome of configuration scenario

Order reported on	Requested TTR- (Time to respond)	Requested TTC- (Time to complete)	Remarks
			is also configured as a non-working day.
			Due to fact that the call is reported on a Thursday, the 24/6 calendar for TTR and TTC will be applied where the non-working days (bank holidays and Sunday) are not taken into account for KPI calculation.

Service Level Agreements - Frequently asked questions

How can I find the SLA I am looking for?

Tip: Do the following checks, as this is not automatically checked by the system:

- The contract line should be in the **Active** status.

- The contract line should be valid at the insert date-time.

- Check if there are any duplicate scope records (in which case it is not clear which SLA to pick).

- Check whether scope records were defined at all and whether these scope records are correct.

- Check if you completed the required fields on the order or request.

Service Level Agreements - Field Descriptions

> ℹ️ Only SLA related fields are explained here. For information on the generic fields of the **Orders** business object, refer to the Work Orders user documentation > Order data.

Internal or external SLA - Fields

Field	Description
Code	Enter a code to uniquely identify the SLA.
Description	Enter a name for the SLA.
SLA service	Select the required internal SLA service from the list. This service is used in searching an SLA on a request/order.
	ℹ️ You can only link an internal SLA to an internal service and an external SLA to an external service. Without this link, SLA Management cannot be used in Service Manager and Service Desk.
Time to respond (TTR)	Select the priority for time to respond from the list. Example: Lighting problem – Priority high – Time to respond: 30 minutes.
Time to attend (TTA)	Select the priority for time to attend from the list.
Time to fix (TTF)	Select the priority for time to fix from the list.
Time to complete (TTC)	Select the priority for time to complete from the list. This field is used to calculate the completion time score for an order. Example: Lighting problem - priority high – Time to complete: 1 hour. The Time to respond/attend/fix/complete fields represent KPIs (Key Performance Indicators) in SLA. For more information, see KPI (Key performance indicator).
	ℹ️ For more information on priority, see *Supporting data > Maintaining priorities.*

Field	Description
Comment	Enter any additional comments on your SLA in this field.
Calendar selection	Select a calendar that is applicable from the list.
	Calendar for properties: Select this option if the working hours of the property have to be followed.
	Calendar for SLAs: Select this option, if the working hours of the external tradesperson who is going to carry out the SLA have to be followed.
	No Calendar: Select this option, if there are no time restrictions to carry out the SLA.
Cost center	Select the cost center of the SLA.
Department	Select the department of the SLA.
Assigned externally by	Specify the address of person the SLA was assigned by.
External tradesperson	Enter the address of the External tradesperson who will work on the SLA.
Document	Upload support documents related to the SLA service.
Validity	Select a calendar that defines the validity of the SLA. This field only applies to sub SLAs. For more information, see Adding a sub SLA.

Cost periods - Fields

Field	Description
Code	Enter a code to uniquely identify the cost period.
Description	Enter a name for the cost period.

Cost period

Field	Description
Start date	Enter a start date for the cost period. When you define multiple cost periods, these must be consecutive. If a cost period without an end date already exists and you define a new one, then the end date of the previous period is calculated and completed as follows: Start date of new cost period minus 1 day.

Field	Description
	If a cost period already exists and you define a new one, then by default the start date of this new period is calculated and completed as follows: End date of previous period plus 1 day.
End date	Enter an end date of the cost period, if applicable.

Adding actual costs - Fields

Field	Description
Code	Enter a code to uniquely identify the actual cost.
Description	Enter a name for the actual cost.
External tradesperson	Select the required address of the external tradesperson from the list.

Costs

Field	Description
Cost of materials	Enter the cost of materials.
Labor hour costs	Enter the cost of labor for the service.
VAT tariff	Select a VAT tariff that applies to the actual costs.
VAT amount	Enter the VAT amount for the selected tariff. When you can modify the value in this field, the VAT tariff field is automatically updated.

Total costs

Field	Description
Total costs excl. VAT	Displays the total costs excluding VAT. This is calculated from: Cost of materials + labor hour costs.
Total costs incl. VAT	Displays the cost including VAT. This is calculated from: Cost excluding VAT + VAT amount.

Financial data

Field	Description
Entry date	Select a date for the actual costs.
Transaction date	Select a transaction date for the costs.

Field	Description
External contact tradesperson	Select an external contact tradesperson.
Comments	Type any additional information that you would like to add as reference.

Estimates - Fields

Field	Description
Code	Type a code to uniquely identify the estimate.
Description	Type a name for the estimate.

Estimated hours

Field	Description
Number of hours	Type an estimated number of labor hours.
Tariff group	Select a tariff group from the list. A VAT tariff and an hourly rate are specified for each tariff group. When you select a tariff group, the **Hourly rate** and **VAT tariff hours** fields are updated. The values in these fields can be modified.
Active estimate	If you select **Yes**, the selected estimate is the active estimate to be used in calculations. The last added estimate is automatically the active one.
Hourly wage	Once the **Tariff group** field is completed, the hourly rate is automatically updated. The suggested value can be modified.
VAT tariff hours	Once the **Tariff group** field is completed, the corresponding VAT tariff is automatically populated.

Estimated costs

Field	Description
Costs	Enter the estimated material costs.
VAT tariff cost	Select a VAT tariff applicable to the general costs.

Total costs

Field	Description
Total cost ex. VAT	Displays the total estimated cost excluding VAT, calculated from: (number of hours * tariff per hour) + costs. This field is read only.
Total cost inc. VAT	Displays the total estimated cost including VAT, calculated from: ((number of hours * tariff per hour) + VAT) + (costs + VAT) This field is read only.
Calculation file	Upload support documents containing the cost calculation. For example, a .docx, .xls or a Lotus file.
VAT amount hours*	Planon ProCenter automatically calculates the amount of VAT to be paid. This is based on the selected tariff in the **VAT tariff hours** field. If the value in this field is modified, the **VAT tariff hours** field will be cleared.
Estimate date	Displays the date on which the estimate is added.
VAT amount cost*	Displays the amount of VAT to be paid, based on the tariff selected in the **VAT tariff costs** field. If the value in this field is modified, the **VAT tariff hours** field will be cleared.
Comment	Type any additional information that you would like to add as reference.

Labor hours - Fields

Field	Description
Code	Type a code to uniquely identify the labor hours.
Description	Type a name for the labor hours.
Internal trades person	Select the required trades person for the service.
Trade	Displays the trade specified on the Service agreement service.

> **i** This field can only be edited in the Service provider mode. If this field is empty, it is filled with the trade value of the order, otherwise the trade value of the Service agreement service is entered.

Field	Description
Hour type	Select the required hour type for the service. You can select Travel\Wait\Work.

Hours

Field	Description
Number of hours	Type the number of hours spent.
Tariff group	Select the required tariff group. For each tariff group a VAT tariff and an hourly wage are specified. When you select a tariff group, the Hourly rate and VAT tariff fields are automatically populated. These values can be modified.
Hourly wage	The hourly rate is automatically specified, once the **Tariff group** field is completed. This data can be modified.
Discount / Surcharge %	Type a discount or a surcharge percentage of the standard hourly rate. A surcharge of 20% is specified by 120, whereas a discount of 20% is specified by 80.
VAT amount	Displays the VAT amount applicable to the labor hours, based on the VAT tariff entered in the VAT tariff field. This value can be modified manually, in which case, the VAT tariff field is cleared.
VAT tariff	Once the Tariff group field is completed, the corresponding VAT tariff is automatically specified. The suggested value can be modified.

Total

Field	Description
Total cost ex. VAT	Displays the total cost for labor hours excluding VAT, calculated from: number of hours * tariff per hour.
Total cost inc. VAT	Displays the total cost for labor hours including VAT, based on: cost excluding VAT + VAT.
Transaction date	Select a date on which you want the current transaction to be made.

SLA search priorities - Fields

Field	Description
Code	Enter a code to uniquely identify the search.

Field	Description
Description	Enter a name for the search.
Search sequence	Enter a number which indicates the priority for the combination of SLA search fields. The lowest number takes the highest priority. For example, in a sequence from 1 to 5, 1 has the highest priority.
SLA search fields 1 to 10	In these fields, enter the search criteria for the SLA search priority. The search is performed using the combination of fields in which search criteria are entered. Example, if **Property** is selected in **SLA search field 1** and **Department** is selected in **SLA search field 2**, the SLA is searched using the combination of both fields.

> **i** A setting in **FieldDefiner** allows you to specify if sub elements must also be included when finding SLAs for the hierarchical elements **Property**, **Department**, **Asset**, **Asset group** and **Order group**.

> **i** For more information, see *FieldDefiner > Settings for the SLA search priorities business object*.

SLA scope fields

Field	Description
Code	Type a code to uniquely identify the SLA scope.
SLA scope linked to	Specify the SLA contract line to which you want to apply the SLA scope.
SLA	This field displays the SLA to which the SLA scope applies.
Property	Specify the property to which the SLA scope applies.
Department	Specify the department to which the SLA scope applies.
Cost center	Specify the cost center to which the SLA scope applies.
Order group	Specify the order group to which the SLA scope applies.

Field	Description
Asset group	Specify the asset group to which the SLA scope applies.
Asset	Specify the asset to which the SLA scope applies.
Space type	Specify the space type to which the SLA scope applies.
Space	Specify the space to which the SLA scope applies.
Trade	Specify the trade to which the SLA scope applies.
SLA priority	The number to search for the SLA scope. An SLA priority can also be specified for an order. An SLA is also searched based on this value.
Priority range	Select a priority range from the **Select a value** popup. This value is used to search for a valid SLA.

> **i** For more information on priority matrices and priority range, refer to Supporting data .

Field	Description
Assigned by	Specify the external company to which the SLA applies. Select an address from the list containing the addresses added in Addresses .
External tradesperson	Specify the external tradesperson to whom the SLA applies. Select an address from the list containing the addresses added in Addresses .

SLA related fields on requests/orders

Field	Description
SLA service	Select an SLA service from the list. To display only the relevant SLAs for the order, select **Only display services with a valid SLA** check box in the pop up.

When a service is selected, Planon ProCenter checks if:

1. The service is linked to a service level agreement (SLA).
2. The SLA is linked to an SLA contract line. If yes, all SLA information is copied to the request/order.

> **i** If the SLA service is linked to a standard request/order (in Supporting data) and a helpdesk employee enters

Field	Description
	a new request/order based on this standard request/order, the SLA service field is populated automatically.
SLA	Displays the SLA defined on the service. The SLA contains information about the external/internal coordinator who can complete the service, the 'time to complete' and also the SLA costs (if applicable).
SLA priority	Specify a number to search for an SLA. By specifying an SLA priority for the order, a specific SLA can be found via the SLA scope.
Reported on	Displays the date and time when the order is added.
Requested response date-time (user) / Requested response date-time (property)	Displays the date and time before which a response must be given. This date-time is initially calculated using the SLA's **Time to respond** on the basis of **Original reporting date-time**. If this is not specified, the **Reported on** date is used.
Requested date-time to attend (user) / Requested date-time to attend (property)	Displays the date and time by which the tradesperson must be on site to investigate the problem. This date-time is initially calculated using the SLA's **Time to attend** on the basis of **Original reporting date-time**. If this is not specified, the **Reported on** date is used.
Requested date-time to fix (user) / Requested date-time to fix (property)	Displays the date and time by which the tradesperson should at least provide a temporary solution to the problem. This date-time is initially calculated using the SLA's **Time to fix** on the basis of **Original reporting date-time**. If this is not specified, the **Reported on** date is used.
Requested completion date-time (user) / Requested completion date-time (property)	Displays the date and time by which the order must be completed. This date-time is initially calculated using the **Priority** of the order on the basis of **Original reporting date-time**. If this is not specified, the **Reported on** date is used.
Actual response date-time (user) / Actual response date-time (property)	The actual date and time on which response is given. It can be either set manually or automatically when the order\request is moved to **Completed** or **Canceled** status.

Field	Description
Actual date-time to attend (user) / Actual date-time to attend (property)	The date and time on which the tradesperson is actually on site to investigate the problem. This date-time can be set either manually or automatically when the order is moved to the **Completed** or **Canceled** status.
Actual date-time of fix (user) / Actual date-time of fix (property)	The date and time on which the tradesperson actually fixed the problem. The fix can be temporary or permanent. This date-time can be set either manually or automatically when the order is moved to the **Completed** or **Canceled** status.
Actual completion date-time (user) / Actual completion date-time (property)	The actual date and time on which the order should be (technically) completed. It can be either set manually or automatically when the order/request is moved to **Completed**.

> All the 'Requested date-time' fields and 'Actual date-time' fields come in two variants: one for the time zones of the property and one for the time zone of the user. If the Multiple times zones feature is not enabled, both variants will display the same value and depending on your configuration, you will probably only have one of these two variants available on your layout.

> For more information, refer to Multiple Time Zones.

Field	Description
Original reporting date-time	Enables you to specify a date-time that should be considered as the date-time the order/request was entered. When entered, this time is used to: • calculate the **Requested response date-time**, **Requested date-time to attend**, **Requested date-time to fix**, **Requested completion date-time** of the order. • Search SLAs. Note that in case the calculations above are based upon the Start date-time, the **Original reporting date-time** is made read only. If no **Original reporting date-time** is specified, the **Reported on** date-time will be considered in the above calculations.

Field	Description
	ℹ️ When an SLA is applied, this field can only be changed in existing orders when the order has not been processed yet (still in the **Reported** status).
Contract line	Displays the contract line linked to the SLA.
Weighting	Specify a number to indicate the importance of the order. Based on the weighting, the completion time score and response time score are calculated.
	The value in the **Weighting** field can also be adopted from the SLA.
'Time to respond' score	Displays the response time score calculated based on the **weighting**. This score indicates if the response on the order was in time or not.
	If the **Actual response date-time** is less than (or equal to) the **Requested response date-time**: Response time score = Weighting
	If the **Actual response date-time** is greater than the **Requested response date-time**: Response time score = -1 * Weighting
'Time to attend' score	Displays the score calculated for the 'Time to attend' based on the **weighting**. This score indicates if the order was attended to in time or not.
	If the **Actual date-time to attend** is less than (or equal to) the **Requested date-time to attend**: Attend time score = Weighting
	If the **Actual date-time to attend** is greater than the **Requested date-time to attend**: Attend time score = -1 * Weighting
'Time to fix' score	Displays the score calculated for the 'Time to fix' based on the **weighting**. This score indicates if the fix from the order was in time or not.
	If the **Actual date-time to fix** is less than (or equal to) the **Requested date-time to fix**: Fix time score = Weighting
	If the **Actual date-time to fix** is greater than the **Requested date-time to fix**: Fix time score = -1 * Weighting
'Time to complete' score	Displays the completion time score calculated based on the weighting. This score indicates if the order has been completed in time or not.
	If the **Actual completion date-time** is less than (or equal to) the **Requested completion date**:

Field	Description
	Completion time score = Weighting
	If the **Actual completion date-time** is greater than the **Requested completion date**: Completion time score = -1 * Weighting
TTR throughput time	Displays the time difference between the **Actual response date-time** and the **Insert date-time** of the order. The throughput time is calculated on the basis of the priority defined on the SLA.
	If the **Original reporting date-time** is specified, it will be used instead of the **Insert date-time**.
TTR total waiting time	Displays the total waiting time that affected the time to respond.
TTR unit	Displays the unit used to calculate the TTR throughput time and TTR total waiting time fields.
TTA throughput time	Displays the time difference between the **Actual date-time to attend** and the **Reported on** date-time of the order. The throughput time is calculated on the basis of the priority defined on the SLA.
	If the **Original reporting date-time** is specified, it will be used instead of the **Reported on** date-time.
TTA total waiting time	Displays the total waiting time that affected the time to attend.
TTA unit	Displays the unit used to calculate the TTA throughput time and TTA total waiting time fields.
TTF throughput time	Displays the time difference between the **Actual date-time of fix** and the **Reported on** date-time of the order. The throughput time is calculated on the basis of the priority defined on the SLA.
	If the **Original reporting date-time** is specified, it will be used instead of the **Reported on** date-time.
TTF total waiting time	Displays the total waiting time that affected the time to fix.
TTF unit	Displays the unit used to calculate the TTF throughput time and TTF total waiting time fields.
TTC throughput time	Displays the time difference between the **Actual completion date-time** and the **Reported on** date-time of the order. The throughput time is calculated on the basis of the priority defined on the SLA.

Field	Description
	If the **Original reporting date-time** is specified, it will be used instead of the **Reported on** date-time.
TTC total waiting time	Displays the total waiting time that affected the time to complete.
TTC unit	Displays the unit used to calculate the TTC throughput time and TTC total waiting time fields.

> **ℹ** The unit of measurement for the 'time to respond/attend/fix/complete' depends on the period of the specified priority on the SLA. If the period of the priority is specified in hours or days, this unit will be in *Working minutes*. If the period of the priority is specified in minutes/weeks/months/years or if it is empty, this unit will be in *Clock minutes*. If no priority is defined for the SLA at all, this field will remain empty.

Field	Description
Waiting since	Displays the date-time when the status of an existing order is changed from non-wait to wait.
Resumed since	This is a system field which (temporarily) stores the date-time when the order in a wait status is moved back to non-wait status in case an order is resumed off line via **Planon Mobile Field Services**.

Index

V
Validity 45
W
Wait status 27