



Service Scheduler

Planon Software Suite

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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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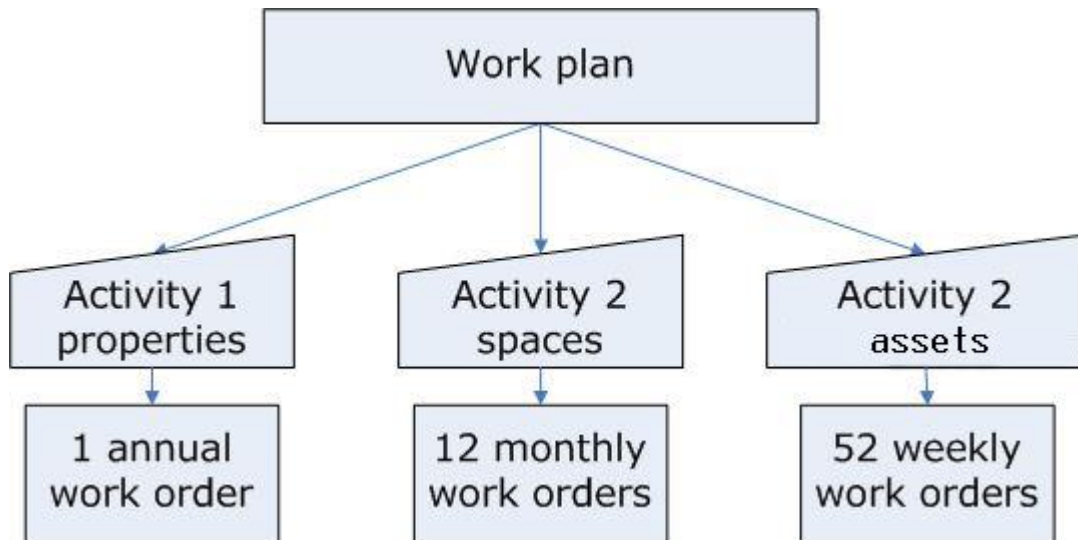
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About Service Scheduler

The Planon ProCenter **Service Scheduler** TSI is a powerful tool that enables facilities managers to create work plans with scheduled activities, from which work orders will periodically ensue in the **Service Manager** TSI.

A work plan may include several activities that have to be carried out periodically and that can be scheduled in advance. The work plan activities can have bearing on four distinctive subjects: properties, spaces, rentable units or assets. In addition, work plan activities must be linked to schedules and standard orders, to determine the time and frequency of their execution and the content of the work orders that should ensue.

The following diagram is an example of the structure of a work plan, with two activities. Activity 1 has bearing on one subject: a property. Activity 2 has bearing on two different subjects (spaces and assets):



Once a work plan is defined, and the work plan with its activities is activated, work orders can be generated from the **Service Scheduler** TSI to the **Service Manager** TSI.

The completion of orders that were generated from within the **Service Scheduler** TSI should be further dealt with in the **Service Manager** TSI.

Service Scheduler - Concepts

Activity

An activity is a recurring task or service that you intend to include in a work plan. By default, the status of an activity is **Under construction**. After you have finished defining the activity, you can change its status to **Active**. An activity with the **Active** status will immediately come into effect. As a result, work orders will be generated in the **Service Manager** TSI in accordance with the corresponding schedule.

Activity subject

The property, space, asset or rentable unit to which a scheduled activity applies. Links between activities and their subjects can be made at the **Activity subjects** selection level.

Property	A scheduled activity can apply to a property (building or complex of buildings). In that case the property is the activity subject.
Rentable unit	A scheduled activity can apply to a rentable unit. In that case the rentable unit is the activity subject. A rentable unit is (part of) a property that can be leased or subleased as an undividable entity. A rentable unit is always linked to a property.
Space	A scheduled activity can apply to a space. In that case the space is the activity subject.

Asset

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

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

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

Moves only deals with moveable assets.



System administrators can make settings to exclude specific, non-moveable assets from being selected and displayed in **Moves** and the **Move request wizard** in Self-Service.

Exclusion of assets from moves is done in the **Move settings** TSI, on the basis of the assets' classification group.

Service Scheduler work orders

Service Scheduler work orders are work orders that have been generated from an activity and added in the **Service Manager** TSI. Work orders that have been generated from **Service Scheduler** can have order settings of their own, which can be set for the **Orders** business object in **FieldDefiner** > **Business objects** selection level > **System business objects** action menu > **Business object settings** option.

Schedule

The schedule that is linked to a work plan activity determines its start time and frequency. If you have sufficient rights, you can add, modify and delete schedules in a dialog box at the **Activities** selection level.

Scheduling methods

Activities must be linked to a specific scheduling method. The linked scheduling method determines the way the start dates of future generated work orders are adjusted when an end user changes the start date or the completion date of a single work order in a set of generated work orders in the Work Orders TSI.

There are three scheduling methods:

- **Variable method:** the start dates of individual work orders that were generated from this activity can be adjusted without consequences for the other work orders that are (or will be) generated from the same activity.
- **Fixed method:** the start date of a generated work order can be adjusted, but this will have consequences for future work orders that are generated from the same activity. Their start date will be adjusted with the same interval that was applied to the work order that was modified first. Note: this automatic adjustment of start dates only applies to future work orders with the **Reported** status.
- **Fixed completion method:** adjustments to one work order's completion date (by modifying the **Technically completed on** field or **Administratively completed on** field) has consequences for the start dates of future work orders that are generated from this activity. This is the case if the completion date of a modified work order is set to a later date than the start date of the next work order. These start dates (**Start date-time** and/or **Planned start date-time**) of the future work orders will be adjusted with the original interval.



In order to see any adjustments (in the start dates or completion dates of generated orders) that ensue from a selected scheduling method, you have to click the **Refresh** button.

Standard work order

In Planon ProCenter, standard orders are a kind of 'instant' orders, which considerably speed up the process of feeding new orders into the system. The Planon ProCenter administrator can define standard orders for most order types. One of these is the standard work order. Standard work orders can be linked to activities in the **Service Scheduler** TSI. Once a standard work order is linked to an activity and the activity's status is set to **Active**, work orders can be generated at regular intervals. The linked standard work order acts as a kind of template for the generated work orders. For more information on preparing a standard work order for Service Scheduler order generation, refer to [Preparing standard work orders for work order generation](#).



For general information on standard orders, refer to *Service Manager*.

Work plan

A work plan is a group of activities that are required to complete a specific scope of work.

By default, the status of a work plan is **Under construction**. After you have finished defining the work plan and all related activities, you can change its status to **Active**. If you activate a work plan which includes activities that are still under construction you will be asked whether these activities must be activated also.

Working with Service Scheduler

Working with **Service Scheduler** starts with the definition of a work plan. A work plan is a group of activities that are somehow related to each other and that are required to complete a specific scope of work.

Example The facilities manager of company X intends to create a work plan for a much-used type of vending machine which is present at various locations within the organization. The work plan includes these activity types.

- **Activity 1:** Replenishing the vending machines' stock and collecting the cash. The facilities manager intends to have the restocking and cash-collecting activities carried out by a staff member;
- **Activity 2:** Technical maintenance of the vending machines, which is the responsibility of the machines' supplier.

Both the restocking and maintenance activities should take place at regular intervals. The facilities manager starts with adding the work plan in Planon ProCenter. The next step is to add these types of activity (1 and 2) to the new work plan. Additionally, each activity is linked to a:

- Schedule
- Standard *work order* (that has been created for this purpose)
- Corresponding *activity subject*, in this case assets (the vending machines)

Once the activity's status is set to **Active**, work orders will be generated in the **Work orders** TSI for each type of activity, in accordance with the linked schedules. In **Work orders**, the completion of the work orders can be further monitored and settled.

Adding a work plan

Procedure

1. Go to Work plans.
2. On the action panel, click Add.
3. On the data panel, enter the relevant work plan data.

For field descriptions, see [Work plan fields](#).

4. Click Save.

Adding activities to a work plan

Procedure

1. Go to Work plans and select a work plan to which you want to add activities.
2. Go to **Activities**.
3. On the action panel, click Add.
4. On the data panel, enter the relevant data for the activity.

For field descriptions, see [Activity fields](#).

5. Click Save.


An activity is created for the selected work plan. Repeat the procedure to add any additional activities.

Adding/modifying schedules

You can add schedules by following this procedure.

Procedure

1. Go to Work plans > Activities.
2. Select an activity for which you want to add / modify the schedule.

 If the schedule is already **Active**, you must first select the **Under construction** action on the action panel.

3. In the Schedule field, select a relevant schedule and click **OK**.
4. Or, to add a new schedule, click **Add** in the **Schedule** dialog box.
5. Enter a **Code**, **Name** and **Frequency** for the new schedule.


You can choose **Daily**, **Weekly**, **Monthly** or custom **Calendar** options for the schedule's intervals.

6. Click Save and **OK**.

You have added / modified the schedule for the selected activity. You can activate the schedule by selecting the **Active action on the action panel.**

Linking subjects to activities

You can link **Activity subjects** to selected activities. These activity subjects constitute the scope that applies to an activity.

 Activity subject links can only be created, changed or removed if the related activity is **Under construction**.


Procedure

1. Go to Service scheduler activities.

2. On the action panel, click Add [...] links and select one of the available links.


The following activity subjects are available:

- **property links,**
 - **space links,**
 - **rentable unit links,**
 - **asset links.**
3. At the **Service scheduler activities** selection level, you can check the linked schedule and add any deviating start and end date-times. For a description of subject activity fields, see Service scheduler activities fields.
 4. Click Save.

 You can archive activities (and retrieve them when necessary) so that the active activities alone are visible in the elements panel. The archive option for activities is only available when the end date is the current date and the value in the field **No. of outstanding work orders** is 0.


Generating Work Orders in Service Scheduler

After you have created a comprehensive work plan in the **Service Scheduler** TSI, complete with all the activities and activity subjects that you want to include, you can start the process of generating work orders in the **Service Manager** TSI. Depending on the linked standard work order and schedule, a set of work orders will be generated as soon as you change an activity's status to **Active**.

 All activities of a work plan can be set to **Active** simultaneously by changing the work plan's status to **Active**. Because work orders will be generated then for every activity, this may take some time.

Preparing standard work orders for work order generation

Standard work orders that are used for work order generation in the **Service scheduler** have to meet a few requirements. If you have the appropriate authorization, you can maintain standard work orders in **Supporting data > Standard orders**.

 For information on adding, modifying, deleting standard orders, see *Supporting Data*.

- The initial status of the standard work order must be **Reported** for the order generation to work correctly. This status can be entered in the **User-defined status** field of the standard work order
- If you want the generated orders to have a fixed duration, you must complete the standard work order's **Start date-time** and **End date-time** fields on the **Planning** tab. The interval between the start date-time and end date-time is added to the start time (or deviating start time) of the generated order(s). For example: if the interval between the start date-time and end date-time of the standard work order is 2 hours, 2 hours will be added to the start time of the generated work order(s). The end time of the generated work order(s) will be 2 hours later.

To generate work orders, do these.


Procedure

1. In Service scheduler > Activities selection level, select the activity for which you want to start generating work orders.
2. On the action panel, select the Active option.


The number of work orders that you have specified at the **Activities** selection level > **Schedule** field > **Schedule** dialog box > **Outstanding work orders** field, will now be generated.


3. On the navigation panel, select the Orders TSI > Orders selection level.


The **Planned start date-time** field of the generated work orders will be populated with a calculated start date and time. The **Planned start date-time** is used to calculate priorities and SLAs.

 This read-only field is not visible by default. It should be made visible for the relevant work order type in **TSI Manager**.

As soon as one of the work orders reaches a decisive status, for example the **Administratively completed** status, a new work order will be generated, to replenish the number of outstanding work orders. This process of replenishing work orders will continue until the end date of the **Service Scheduler** activity has been reached.

 Authorized users can select decisive work order statuses after which the **Service scheduler** will generate new work orders. Settings to this effect are available in **Field definer** > **System business objects** action panel > **Business object settings** option. These settings can have bearing on the statuses of all (user-defined) work order types.


 **Service scheduler** works best if end-users apply status transitions accurately and timely to generated work orders in the **Orders** TSI. The status flow in the **Orders** TSI should be such that a work order reaches its decisive status in time (for example: before the start date of the last work order in the series), in order to prevent backdated work orders from being generated.

 For more information on making **Service scheduler** settings for work order statuses, see *Field definer*.


 For more information on work orders and user-defined work order types, see *Work orders*.

Service Scheduler – Field Descriptions

Work plan fields


Field	Description
Code	In this field you can enter a code for the work plan.
Name	In this field you can enter a name for the work plan
Start date	From the date picker in this mandatory field, you have to select a start date for the work plan.
End date	From the date picker in this field, you can select an end date for the work plan.
Status	In this field the selected work plan status is displayed: Under construction or Active . You can select a status for your work plan in the Status transitions action menu.
	<div data-bbox="602 1108 1318 1230" style="border: 1px solid #0070C0; padding: 5px;"> If you activate a work plan which includes activities that are still under construction, you will be asked whether the activities have to be activated as well.</div>
Internal owner	From the pick list in this field, you can select a person from the Personnel Management TSI who will be responsible for the work plan.
External owner	From the pick list in this field, you can select an address of an external organization (from the Contact Management TSI). The selected address belongs to a company that will be responsible for the work plan (for example a supplier).
Comment	Use this field to add an additional comment about the work plan.
Transferred to archive (Y/N)	This field shows whether the work plan has been transferred to the digital archive or not.

Activity fields


Field	Description
Code	Specify a code for the activity.
Name	Specify a name for the activity.
Work plan	Select a work plan from the pick list.
Scheduling method	<p>In this field you can select a scheduling method that should apply to any work orders generated from this activity. You can choose between: Variable method, Fixed method and Fixed completion > method.</p> <p>For detailed information on scheduling methods, refer to Scheduling method.</p>
Standard work order	<p>Select a standard work order from the list. The selected standard work order serves as template for the work orders that will eventually ensue from the activity. The standard work order may include details such as order lines, estimates, and costs.</p> <div style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <p> If you apply the Fixed method or Fixed completion method scheduling methods to generate work orders, the selected standard order must have the Reported status as its initial status. These scheduling methods will not have the desired effect on order generation if the standard order has a different initial status than Reported.</p> </div>
Schedule	<p>Select/add appropriate schedules for activities. For more information on adding schedules, refer to Adding/modifying schedules.</p>
Start time	Specify a start time for the schedule.
Outstanding work orders	<p>Specify a 'batch size' for the number of work orders that should periodically ensue from the activity. Example: if you want to generate 12 outstanding work orders, you could select a weekly frequency in the Frequency field of the Schedule dialog box and enter 12 in this field. Once the corresponding activity gets the Active status, 12 work orders will be generated in the Work Orders TSI. After one of the 12 generated work orders is completed, a new work order will be automatically generated in the Work Orders TSI, so that the number of 12 outstanding orders is maintained.</p>

Field	Description
Start date	Select a start date for the activity.
End date	Select an end date for the activity.
Status	In this field, the activity's status is displayed. By default the status is Under construction . Once you select the Active status from the Status transitions action menu, the selected activity will start generating work orders in the Work Orders TSI, in accordance with the chosen schedule and standard order.
Comment	Use this field to add an additional comment about the activity.
Transferred to archive (Y/N)	This field shows whether the activity has been transferred to the digital archive or not.

Service scheduler activities fields

Field	Description
Asset	<p>If you have selected Asset links from the action panel, you can select an asset in this field. The selected asset will be the subject of the selected activity.</p> <div style="border: 1px solid #00a0e3; padding: 5px; margin: 10px 0;"> <p> You can only link simple assets to an activity. Multiple assets will not be displayed in the dialog box that can be opened from within the Asset field.</p> </div>
Property	If you have selected Property links from the action panel, you can select a property in this field. The selected property will be the subject of the selected activity.
Space	If you have selected Space links from the action panel, you can select a space in this field. The selected space will be the subject of the selected activity.
Rentable units	If you have selected Rentable unit links from the action panel, you can select a rentable unit in this field. The selected rentable unit will be the subject of the selected activity.
Activity	This field displays a reference to the activity that links to the activity subject.

Field	Description
Comment	Use this field to add an additional comment about the activity's subject.
Contract line	Select the contract line to which you want to link the activity. All orders generated for this activity subject, will consequently be linked to this contract line.
Deviating start date	If necessary, you can enter an alternative activity start date for any activity subjects that are added to the work plan intermediately.
Deviating contract line	If necessary, you can enter an alternative contract line for any activity subjects that are added to or deleted from the work plan intermediately.
Deviating end date	If necessary, you can enter an alternative activity end date for any activity subjects that are added to or deleted from the work plan intermediately.
Deviating start time	If necessary, you can enter an alternative activity start time for any activity subjects that are added to the work plan intermediately.
No. of outstanding work orders	This field is automatically populated with the number of work orders that are still outstanding. Each time an activity-related work order reaches a decisive status, for example 'completed' or 'canceled', the number in this field is reduced by one. New work orders will be generated until the activity's end date or the activity subject's deviating end date is reached.

 Settings in order to select decisive work order statuses, after which the **Service Scheduler** will generate new work orders, are available to authorized users in **Field definer**.

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