



Spaces and Moves Scenario Planning

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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About space planning in Planon

Space planning in Planon can be performed at various levels and in various TSIs:

- Real estate planning: top-level planning of the real estate portfolio for multiple years (sites and properties). This functionality is available in the **Portfolio Strategies** TSI.
- Strategic workplace planning: high-level planning of capacities in space area and workspaces (properties and floors). This functionality is available in the **Strategic Space Planning** TSI.
- Spaces scenario planning: medium-level scenario planning of spaces, assets and people (floors and spaces). Planning is based on detailed scenarios. This functionality is available in the **Spaces and Moves Scenario Planning** TSI.
- Workspace planning: operational space and workspace management of the actual, reference date based situation. This functionality is available in the **Space Management** TSI.
- Real-time use support: detailed operational level of information about occupancy based on claim behavior and sensor information used to inform facility managers about the effective use of space and workspace and to inform building users about available workspaces. This functionality is available in the **Agile Workplace Management** TSI.



For more information on the above-mentioned TSIs, refer to the relevant part of the user documentation.

This part of the user documentation focuses on the space scenario planning functionality as provided by the **Spaces and Moves Scenario Planning** TSI.

Non-assigned workspaces and alternative workspace concepts like home offices are generally adopted nowadays, but the 'traditional' concept of workspaces is still used a lot. In this situation, people and assets move a lot. Relocation has impact on people, assets and costs. The **Spaces and Moves Scenario Planning** TSI allows you to compare various space planning scenarios with their impact and choose the best scenario.

Space Scenario Planning Process

In general, the space scenario planning process in Planon includes the following steps:

- Importing the actual situation on a reference date in Planon (based on an imported .dwg or .dxf drawing including data on space usages and assets).

- Creating scenarios of the required situation (scenarios are in fact *drawings* created by an external service provider, such as an architect, or by the internal space management department).
- Planon adds the data of the actual situation (refer to the first step). This allows to compare a scenario with:
 - the actual situation on a reference date
 - other scanned scenarios
- Comparing the resulting data at different levels and from different angles via a system report. The report includes per scenario (versus the actual situation):
 - space usage per department, cost center, space type, space category, space standard, tariff group
 - assets involved
 - assets moved/added/removed
 - costs related to the required moves



The **Move rates** TSI allows you to define, per asset type and per move type, the costs that are involved in moving assets to another location.

- Selecting a scenario based on the results of the comparison of scenario data.
- Importing the selected scenario (.dwg or .dxf drawing) in Planon. Planon updates space usages and assets on the selected reference date. Existing data is now replaced and a list of move requests is created in the **Move Management** TSI in Planon.

Spaces and Moves Scenario Planning - Concepts

This section describes the concepts available in **Spaces and Moves Scenario Planning** and how they interact with each other.

See the links below for more information:

- [Spaces and Moves Scenario Planning Projects](#)
- [Space and moves scenario](#)
- [Spaces and Moves Scenario Project statuses](#)
- [Spaces & moves scenario statuses](#)
- [Baseline scenarios](#)
- [Scenario comparison profiles](#)
- [Scenario drawing - Floor mappings](#)
- [Scenario items](#)
- [Scenario items location](#)
- [Snapshot scenario item](#)

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Spaces and moves scenario planning projects

A spaces and moves scenario planning (SMSP) project has control over the process of Space and Moves scenario planning. The project goes through multiple statuses and actions during the process. It allows you to create multiple scenarios and compare them with each other and with the existing baseline data of the specified reference date. Baseline data contains information about the situation in Planon on the selected reference date. Based on the results of the comparison, you can choose the scenario that best suits your organization's needs.

Spaces and moves scenarios

A scenario is a set of drawings with .dwg, or .dxf extensions that allows you to compare space or asset related data for floor/property combinations on a proposed date with the existing data in Planon on the same date. While creating a scenario the following information is specified:

- The **CAD import definition** to scan the drawings. The **CAD drawing definitions** are specified automatically. The **CAD import definition** defines details such as the location of the drawings to be imported, creation of .orj files from the .dwg drawings, importing of assets, resuming or removing the spaces. The **CAD drawing definition** defines the relation between the data in Planon ProCenter and the information in the AutoCAD drawing. You can define the entities in the drawing so that you can map them onto the Planon ProCenter business objects.
- The **Scenario drawings inbox** to specify the location for the scenario import files. All the scenario related drawings and reference drawings are maintained in the 'ScenarioInbox' (Scenario drawing inbox) folder.
- The **SMSP project** to which the scenario must be linked.
- Whether the scenario should be included for comparison in the **Include for Comparison** field.
- The **Computed date**
- The **Scanned date**

Tip

For more information on each field, refer to [Spaces and moves scenario fields](#).

Spaces and moves scenario planning project statuses

An SMSPP project's process includes following statuses:

Prepare

The project is set to the **Prepare** status by default. You can assign comparison profiles and create scenarios to the project.

Compute Scenario

After scanning all scenarios, the baseline scenario must be computed to create baseline data for the SMSPP project. A scenario should be computed after computing the **Baseline scenario**. In order to compute a scenario, the project's status must first be set to **Compute Scenario**.

After changing the project's status, the **Compute scenario** action becomes available at the **Space and move scenario** level's action menu. After computing, actual space/asset related data available in Planon on the specified reference date is retrieved and changes per scenario are computed and compared to the baseline. The data in the **Snapshot Scenario - Items** selection step is created while computing the baseline and the scenario. After computing the scenario, the locations are registered at the **Scenario items locations** selection step with information on the location of the assets/spaces on the specified reference date.

Warning

If the project is moved back to the **Prepare** status, the baseline data and the snapshot items data will be removed.

Compare

After computing a scenario, the project must be set to the **Compare** status in order to be able to run the **Spaces and moves scenarios** report. The baseline data and scenarios cannot be changed in this status. This status makes sure that the data is frozen and cannot be modified while comparing.

Completed

After the selected scenario is imported, the project's status must be changed to **Completed**. All the scenario data displayed in the **Scenario items**, **Scenario items locations** and **Snapshot Scenario - Items** selection steps will be removed.

Spaces and moves scenario statuses

The spaces and moves scenario process includes the following statuses:

Initial

A scenario's status is set to the **Initial** status by default while creating it. The floor mappings are linked to a scenario in this status.

In Progress

When a scenario is ready to be scanned, its status must be set to **In Progress**. The **Scan scenario** action now becomes available in the action menu. Upon selecting **Scan scenario**, the system scans the drawings which are mapped at the **Scenario drawing – Floor mapping** selection step. The space and asset related data retrieved from the drawing after scanning is displayed at the **Scenario items** and **Scenario items locations** selection steps at **Scenario details**. A scenario is computed by changing the status to **Compute Scenario**. The scanned scenario data is compared with the baseline data.

In this status, you can compare scenarios by running the **Spaces and moves scenarios** report.

Note When a scenario is scanned and computed, the date/time of the scan and the date/time of the compute are registered in the time stamp.

Warning

When a scenario's status is changed from **In Progress** to **Initial**, all the scanned data in the **Scenario items** and **Scenario items locations** selection steps will be removed.

Promote

After the best fitting scenario is finalized for your organization, you have to change its status to **Promoted** to promote the scenario. When a scenario is promoted, all other scenarios under the same project will be canceled automatically.

Import Scenario

After the selected scenario is promoted, you can import it into Planon by changing its status to **Import Scenario**. Planon then updates the space usages and assets on the effective move date set on the project. The changed configuration or data per promoted scenario drawing and a list of move requests is created in the **Move Management TSI** in Planon.

Cancelled

A scenario's status can be changed to **Canceled** at any point during the process.

Baseline scenarios

A baseline is created for all floors linked to a scenario. In order to compare the scanned scenario data of a specified reference date with the existing Planon data on that date, a baseline scenario must be created. The baseline scenario contains data about the actual spaces and assets available in Planon on the specified reference date. When a scenario is computed, the system identifies the changes, moves and costs.

Scenario comparison profiles

In an SMSP project, it is possible to assign comparison profiles for a scenario. You can select a space item based on which you want to compare your scenarios. Scenarios can be compared based on one or more of the following items: cost center, department, space category, space standards, space type, tariff group.

Example: If you select 'Department' and 'Space type', the scenarios will be compared based on departments and space types.

Scenario drawing - Floor mappings

For every scenario, a floor mapping is defined for comparison. This means that you have to link a drawing of the corresponding floor and property to your scenario. When a scenario is scanned, the results are retrieved based on these drawings and CAD import definitions. You can define multiple floor mappings per scenario.

Warning

You cannot compare based on non-existing properties or floors in Planon. If there are new floors, you must first define them in the **Space management** TSI. For more information on how to define new floors, refer to *Space management*.

Scenario items

When a scenario is scanned, Planon retrieves data from the drawing based on the linked CAD import definition. The **Scenario items** selection step lists the space and asset data retrieved from drawings.

Scenario items location

After scanning a scenario, the **Scenario items location** selection step displays the location details of each space and asset listed in the **Scenario Items** selection step.

Snapshot scenario item

The comparison results retrieved after computing the scenario and baseline are displayed at the **Snapshot scenario item** selection step. The results are computed based on the comparison profile linked to the project. This data includes information about the spaces and assets found in Planon on the specified reference date.

In case of spaces, the changes are displayed per selected attribute (department, cost center, space type, space category, space standard, tariff group). In case of assets, the following information is displayed: the assets involved, the assets that have moved or changed and the way they are moved and the costs involved.

Warning

The move of assets within spaces are not considered as a move to another place.

Working with Spaces and Moves Scenario Planning

This section explains the processes and tasks that can be performed in the Spaces and Moves Scenario Planning TSI.

- [Creating an SMSP project](#)
- [Defining and linking a comparison profile](#)
- [Creating a spaces and moves scenario](#)
- [Linking a scenario to a floor and drawing](#)
- [Scanning a scenario](#)
- [Creating a baseline](#)
- [Computing a scenario](#)
- [Running the Spaces and moves scenarios report](#)
- [Report settings - Spaces and moves scenario planning](#)
- [Promoting the preferred scenario](#)
- [Importing the promoted scenario](#)

Creating an SMSP project

The first step in the Spaces and Moves Scenario Planning (SMSP) process is creating an SMSP project.

Procedure

1. Go to Projects.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to SMSP project fields.
4. Click Save.



You can link a comparison profile to your project. For more information on comparison profiles, see [Defining and linking a comparison profile](#).

Defining and linking a comparison profile

Once you have defined your SMSP project, you can link a comparison profile to it. This allows you to specify the space-related items you want to use to compare scenarios with each other and with the current situation in Planon.

Procedure

1. Go to Projects > Comparison profiles.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Comparison profile fields.
4. Click Save.
5. Go back to the Projects selection level.
6. In the Comparison profile field, select the profile you want to link to the SMSP project.



If no comparison profile is selected, comparison is done based on *all* space-related items (Cost center, Department, Space category, Space standards, Space type, Tariff group).

Creating a spaces and moves scenario

Create spaces & moves scenarios and link them to your SMSP project. This enables you to compare various scenarios and finally choose the one that best fits your organization's needs.

Procedure

1. Go to Spaces & moves scenarios.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Spaces and moves scenario fields.
4. Click Save.

Linking a scenario to a floor and drawing

Link a corresponding floor and drawing to a scenario.

Procedure

1. Go to Scenario details.
2. On the action menu, click Add.
3. In the data section, complete the relevant fields. For a description of these fields, refer to Scenario drawing - floor mapping fields.
4. Click Save.



Planon supports .dwg, and .dxf drawings.

Scanning a scenario

Once you have linked a floor and drawing to a scenario, proceed by scanning the scenario. Scanning is done based on the linked CAD import definition. The available space and asset data is retrieved from the drawing and becomes available in Planon.

Procedure

1. Go to Spaces & moves scenarios.
2. Select the scenario(s) that you want to scan.
3. On the Status transitions menu, click In progress.
4. On the action menu, click Scan scenario.

The drawing is scanned now. The space and asset data retrieved from the drawing during the scan is displayed at Scenario details > Scenario items and Scenario details > Scenario item locations.

Creating a baseline

After you have scanned the required scenarios, you can proceed by creating a baseline for your SMSP project. By creating a baseline, the available space data on the **Proposed move date** is retrieved.

Procedure

1. Go to Projects.
2. Select the project for which you want to create a baseline.
3. On the Status transitions menu, click Compute scenario.
4. On the action menu, click Create baseline.

A baseline is now created. Baseline data is available at the **Snapshot scenario items** selection step. Note that for these items the setting **Baseline scenario item?** is set to **Yes**.

Computing a scenario

Compute the changes per scenario against the baseline.

Procedure

1. Go to Spaces & moves scenarios.
2. Select the scenario that you want to compute.

3. On the action menu, click Compute scenario.

The selected scenario is now computed, based on the linked comparison profile. The comparison results are shown at Scenario details > Snapshot scenario items. Note that for these items the setting **Baseline scenario item?** is set to **No**. The Snapshot scenario items list includes the following information:

- the situation in Planon on a specific date (i.e. the selected reference date)
- the space-related changes per attribute (department, cost center, space type, space category, space standard, tariff group) as specified in the comparison profile
- the assets that need to be moved, which type of move and the move costs involved.



The **Spaces & moves scenarios** system report provides the same information. For more information on this report, see [Running the Spaces and moves scenarios report](#).

Running the Spaces and moves scenarios report

The **Spaces and moves scenarios** system report enables you to analyze the impact of your space planning scenario(s).

This report provides the following information, per scenario versus the actual situation (*baseline*):

- space usage per department, cost center, space type, space category, space standard, tariff group
- assets involved
- assets moved/added/removed
- costs related to the required moves

Procedure

1. Go to Spaces & moves scenarios.
2. Select the scenario(s) for which you want to run the report.
3. On the Report menu, click Report.
4. In the Reporting window, click the System reports tab.
5. Select the Spaces and moves scenarios report.
6. On the System reports action menu, click Edit report settings.

The Report settings - Scenario planning window is opened. For more information on these settings, see [Report settings - Spaces and moves scenario planning](#).

Report settings - Spaces and moves scenario planning

The **Report settings - Scenario planning window** allows you to make the following settings:

Title

Enter a report title. By default, the report name is populated.

Subtitle

Enter a subtitle here, if required.

Include cost centers / department / space categories / spaces standards / space types / tariff groups

Specify the space-related items you want to include in your report.

Report details

The **Report details** field enables you to specify the grouping of items in the report. You can choose to group by **Property (main)**, by **Property (sublevel 1)**, or to use no grouping at all (**No grouping**).

Area type in scenario

Specify the area type you want to include in your report. You can choose between **Gross area** and **Net area**.

Promoting the preferred scenario

Select the scenario that best fits your organization's needs and promote it as the scenario that will be implemented.

Procedure

1. Go to Spaces & moves scenarios.
2. Select the scenario that you prefer.
3. On the Status transitions menu, click Promote.

You have now promoted your scenario. The other scenarios are automatically canceled. To implement the promoted scenario for space planning, you have to import it in Planon ProCenter. For more information, see [Importing the promoted scenario](#).

Importing the promoted scenario

Import the promoted scenario (.dwg or .dxf drawing) in Planon.

Procedure

1. Select the promoted scenario.
2. In the Status transitions menu, click Import.

The scenario will now be imported. Planon updates space usages and assets on the selected reference date. Existing data is replaced and a list of move requests is created in the **Move Management TSI** in Planon.

Spaces and moves scenario planning – Field Descriptions

SMSP project fields
Comparison profile fields
Spaces and moves scenario fields
Scenario drawing - floor mapping fields

SMSP project fields

Field

Code

Description

Property

Has conflict

Proposed move date

Baseline move date

System type

System status

Planned start date

Planned end date

Actual start date

Actual end date

Comparison profile

Project manager

Description

Enter a code for the project. This field is mandatory.

Enter a name for the project.

If relevant, enter a property associated with the project.

Displays whether the project contains items with a planning conflict. The default value of this field is **F** (false). If any of the items of the project has a planning conflict, the value of this field automatically changes to **T** (true).

The proposed move date as defined in the SMSP project.

The proposed move date as defined in the baseline.

Displays the project type, SMSP.

Displays the system status of the project.

Use the date picker in this field to enter a start date for the project. If a start date has been filled, the project cannot be calculated.

The end date of the project.

Use the date picker in this field to enter the project's actual start date.

Use the date picker in this field to enter the project's actual end date.

If applicable, select the comparison profile you want to link to the SMSP project.

If applicable, select a person from the pick list who will be responsible for managing the project.

Comparison profile fields

Field

Code

Description

Scenario field type

Description

Enter a code for the comparison profile. This field is mandatory.

Enter a description for the comparison profile.

Select the space item(s) based on which you want to compare your
You can define multiple combinations here. Available options for the
**Cost center, Department, Space category, Space standards, Space
Tariff group.**

Spaces and moves scenario fields

Field

Code

Description

CAD import definition

Include for comparison

System status

Scenario drawings inbox

Spaces & moves scenario planning project

CAD drawing definition

Computed date

Date of scan

Description

Enter a code for the scenario. This field is mandatory.

Enter a description for the scenario.

Select the required CAD import definition. A CAD import definition defines the parameters for what to import from an CAD drawing into Planon ProCenter. The CAD import definition describes the information you want to scan.

Select **Yes** if you want to include the scenario in the comparison.

Displays the scenario's status.

Specify a file location for the scenario import input files (one drawing per scenario, in a separate folder).

Select the SMSP project the scenario is linked to.

Displays the linked CAD drawing definition. A CAD drawing definition defines the relation between the data in Planon ProCenter and the information in the CAD drawing. The CAD drawing definition allows you to define the objects in the drawing, so you can map them onto the Planon ProCenter objects.

Displays the date at which the scenario was computed.

Displays the date at which the scenario was scanned. If your drawing is updated after the scan, you have to do a rescan of the scenario (=0).

Scenario drawing - floor mapping fields

Field

Floor

Property

Scenario drawing

Description

Enter the floor to which you want to link the scenario drawing.

Enter the property where the floor belongs to.

Enter the drawing that corresponds to the selected property and floor.

Warning

You must specify the file name of the drawing with an extension. Supported extensions are .c and .dxf.

Spaces & moves scenario

Enter the spaces & moves scenario to which you want to link the scenario drawing, floor and drawing.

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