Spaces and Workspaces

Planon Software Suite
Version: L105

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 Spaces & Workspaces

Spaces & Workspaces facilitates effective usage of your spatial resource. It can be used to register and retrieve data on conference rooms, offices and other work spaces in your buildings. You can check the spaces' usage for any given period and plan future spaces and space usage ahead. Fixed workspaces and their occupancy rates are also registered and linked to spaces in Spaces & Workspaces .

Much of the information available in Spaces & Workspaces and associated TSIs can be displayed graphically, using the CAD Integrator .

Spaces & Workspaces in Planon ProCenter :

Personnel : If you have linked people to a space and if you have a navigation action configured on your action panel in Spaces & Workspaces , you can quickly retrieve the people who use this particular space.
Additionally, information on people's positions (jobs) and the required number of square meters/feet corresponding with these jobs, is used to calculate the number of square meters/feet required for the people using a particular space. This enables you to determine whether the occupancy rates in a particular space in Spaces & Workspaces meet your set standards.

Work Orders : Spaces can also be linked to orders. If you have a navigation action configured on your **Spaces** action panel to the **Orders** level in Work Orders , you can find out quickly which orders are linked to a specific space.

Reservations: Flexible workspaces can be registered and linked to spaces in Spaces & Workspaces , but this is also possible in **Reservations**.

> For details on making reservations for flexible workspaces, see the *Reservations* user documentation.

Spaces & Workspaces - Concepts

In Spaces & Workspaces , you can retrieve and register information on spaces, floors, workspaces, and space usage. Additionally, you can create reports, perform space mapping or archive data.

See the links below for more information:

- Components
- Spaces
- Space details
- Occupancy
- Workspace
- Workspace details
- Floors and floor attributes
- Reference date
- Tariff groups
- Space history

CAD Integrator in Spaces & Workspaces

CAD Integrator is a viewer tool you can use to access graphical information on spaces. CAD Integrator enables you to view and edit this spatial information in floor plans.

> For more information on working with CAD Integrator and making the correct settings, refer to the CAD Integrator user documentation. Planon ProCenter can be configured to display either meters or feet as a unit of length. These generic settings also apply to CAD Integrator . For more information, see the *System Settings* and *Authorization* user documentation.

In Spaces & Workspaces , CAD Integrator is available at:

- Components > Floors
- Spaces > Spaces
- Space details > Fixed workspaces

You can access CAD Integrator via the CAD Integrator tab on these selection levels. After clicking relevant element(s) in the element list, the linked floor drawing opens. See the following example:
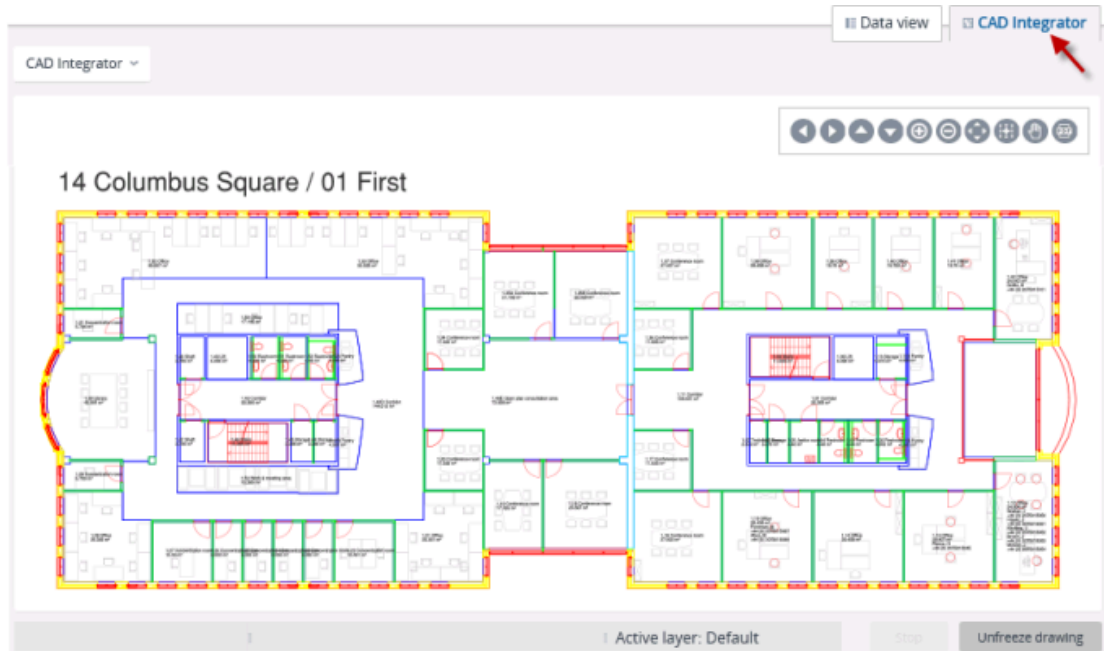
Components

The **Components** selection level enables you to access spaces, workspaces and other elements in Spaces & Workspaces using various space-related selection steps such as: **Floors**, **Zones**, **Space categories**, **Space types**, **Departments**, **Cost centers**, **Tariff groups**, **Space standards** or **Free attributes (1&2)**. Whether you intend to add a new space or try to find an existing one, the selection steps at the **Components** selection level can help you do it more quickly and accurately.

> ℹ️ Space components are also relevant when using the space mapping functionality in CAD Integrator . The components can be used as criteria according to which space mapping takes place.

For a description of the function of the individual components in Spaces & Workspaces , refer to Components - selection steps.

Spaces

Generic data and actions for spaces can be registered and viewed at **Spaces**.

Each space is linked to a specific property and floor. Spaces are time-dependent elements, which mean they have a start date and an optional end date. Spatial information that is linked to the start date and end date can be checked against a set reference date. This enables you to keep a history of the relevant space and its usage.

There is a second selection step at the **Spaces** selection level, which becomes available if you drill down as follows: Properties > Components > Floors > Spaces >

Floor attributes. The purpose of this selection step is explained in the Floors and floor attributes section.

Space data

In Spaces & Workspaces , workspace data and detailed information associated with spaces is available at the **Workspaces & space data** selection level, which includes data on workspaces, free (available) workspaces, flexible workspaces, space usage, facilities, finishings, space dimensions, and space history.

For a description of the functions of the individual selection steps on the **Workspaces & space data** selection level, refer to Space data - selection steps.

Occupancy

Record that indicates where a person is located (workspace) during a specific period.

The record holds additional information concerning:

- The start- and end date

- The number of m2

- The usage percentage by the allocated person

Once workspace data has been registered for a particular space, it is also possible to enter information on who is occupying which workspace and for how long.

You can enter this level of detail at the **Occupancies** step, which is accessible from:

- **Spaces & Workspaces**: Spaces > Space details > (Workspaces) > Workspace details level.

- **Spaces & Workspaces**: Spaces > Workspace details level.

- **Personnel**: **Details** level.

Workspaces

A fixed workspace is a fully equipped desk that an employee occupies regularly, for an indefinite period of time. It is located in a certain area or space on a floor and can have a start time and an end time.

Over time, a workspace might be assigned to a different space. For example, when a floor is rearranged and the related spaces are subdivided into multiple spaces. Obviously, this will also affect the workspaces.

With the appropriate authorization you can add, delete, end and resume workspaces. If you end a workspace, the workspace details active on the end date will also end. If this record already has an end date, it will be overwritten. All workspace details records starting after the end date of the workspace will be deleted.

If a workspace is resumed, a new *workspace details* record is created based for the date of resumption. The end date of the previous workspace detail record will be updated and it will be equal to the resumption date minus 1.

It is also possible to view selected workspaces in a floor drawing by clicking the CAD Integrator tab.

Workspace details

The **Workspace details** step is available at **Occupancies**.
A workspace details record is created automatically whenever you create a new workspace. The new workspace details record has the same start date as its parent workspace. Details such as **Property**, **Floor** and **Space** are prefilled (from the parent workspace) but the **Department** and **Cost center** details have to be added manually.

> ⚠️ A workspace details record with the same start date as its parent workspace can only be deleted if the parent workspace is deleted. All the other workspace details records can be deleted separately.

A **Workspace** can have a start date that lies before the start date of the parent **Space**. For example, *Space 01* has two workspaces: *WS-A* and *WS-B* with start date *15 June*. On the 1st of July, *Space 01* was partitioned into two spaces by erecting a wall in the middle. As a result, workspace *WS-B* is now part of *Space 02* whose start date is 1st of July.

For a description of these fields, refer to Workspace detail fields.

Assignable spaces

Assignable spaces are spaces that can be assigned to people, for example offices and meeting rooms.

Non-assignable spaces are spaces that cannot be assigned to people, such as staircases and public areas.

In general, an assignable space is a space with capacity (persons) and workspace. A non-assignable space is a space with capacity (persons) but without a desk/workspace.

You can use the **Assignable** field to indicate whether a space is assignable or not. For more information, see Space types fields.

Floors and floor attributes

In the Spaces & Workspaces TSI, at Components > Floors, you can register relatively static data about a floor, such as the floor name and code the property to which a floor belongs. You can also **End** or **Resume** a floor here or view the linked AutoCAD drawing.

The more dynamic data on floors, such as its dimensions, flux line values, FM drawing, and AutoCAD drawing, is registered in Spaces & Workspaces at Spaces > Floor

attributes. The floor attributes are shown with their active start date, floor code and name in the elements list. See also: Adding floor attributes and Floor attributes fields.

Level of detail for imported CAD drawings

The **Level of detail** field on floor attributes is taken into account during the CAD import, to filter out smaller details / items from the drawing's display and thus improve CAD Integrator performance. As the drawing display becomes leaner it is loaded and handled faster.

Level of detail is always in the drawing's unit of measurement. For example, if you fill in 0.5 and the drawing is in meters, all objects smaller than 0.5 meters will not be shown in the drawing. If all objects (for example chairs) are based on single lines, the objects will lack some lines. In general, Planon recommends to use polylines instead of single lines.

> ℹ️ During an initial import there usually are no floors yet. In that case, a **Level of detail** of 0.0 is applied, which means that all drawing details are included.

All details of a CAD drawing are saved in an .ORJ file. CAD Integrator , however, displays a .SVG file with the selected level of detail, which is created during the CAD import. If you adjust the level of detail in Spaces & Workspaces , a new .SVG file is created automatically upon reactivating CAD Integrator . During a subsequent CAD import, the newly selected level of detail is automatically applied in the new .SVG file. Information on the level of details is also included at the end of the CAD import logging.

Reference date

The reference date can be set via the **Reference date (...)** button in the Planon header.

> ℹ️ For more information on working with the reference date, see information on the header in *Fundamentals* > *Basic Navigation*.

In Spaces & Workspaces , the reference date is very important, because elements such as space, space usage, (free) workspace, occupancy, and floor are time-dependent elements. They all have starts and potential ends. After they have ended, they can be succeeded by new spaces, workspaces, space usage, occupancy or floors. Finally, spaces and workspaces that have been ended can also be resumed.

For some elements, such as space usage and workspace occupancy, more than one item can be present simultaneously (on the set reference date). For others only one element is permitted on the set reference date, such as floor attributes and space dimensions.

In short: you can record and retrieve different data for the same element over different periods of time. Spatial information that is linked to a specific period in time can be retrieved by selecting a reference date from that period.

Tariff groups

A tariff group can be linked to a space usage for the purpose of charging costs back to a particular department/cost center. If you want to modify the data of a certain tariff group, you can for example create a follow-up tariff group (a copy of the tariff group) so that you can index the tariff group.

The advantage of using a follow-up tariff group is that you can directly apply the modified tariff to the corresponding space usage and/or workspaces. If necessary, the old (original) tariff group can then be transferred to the digital archive.

For more information on working with follow-up tariff groups, refer to Working with tariff groups.

Space history

Planon ProCenter enables you to display a history of changes made to fields belonging to:

- Spaces
- Space usages
- Space dimensions

  The history includes the user who changed the value in a field, the old and new values of the field and the time and date at which the value was changed. You can select which data fields of a space, space usage and space dimension you want to keep a history on.

  In Field definer , you can enable an automatic **History** option for individual fields belonging to spaces, space usages and space dimensions. Once this option is enabled for a field, changes to that field's value are saved automatically. These changes can then be viewed on the **History** selection step.

> For details on changing field attributes, refer to *Field definer* .

Working with Spaces & Workspaces

This section explains how to use the Spaces & Workspaces TSI.

See the links below for more information:

Setting the reference date

In Spaces & Workspaces , you can use the reference date to view the data fields of a particular space or floor at a specific point in time.

The reference date is set via the **Reference date** button in the Planon header.

The current date is set by default. Clicking **Reference date** opens a date picker, from which you can select another date that is in the past or in the future.

Once a new reference date is selected, the color of the header button changes and it displays the selected date.
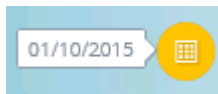
Your elements list is then filtered according to this date. The list will only display items that are valid on the selected reference date, i.e. items whose start date is earlier than or identical to the reference date and whose end date is later than or identical to the reference date.

Deactivate the reference date by clicking **inactive** in the header. This causes all elements that meet the current selection criteria to be displayed, regardless of the date. The reference date applies to spaces, floors, space usage, space dimensions, workspaces and occupancy rates.

> ⚠ A deactivated reference date affects automatically populated fields in Planon ProCenter - for example the calculated fields of space usage. With a deactivated reference date, calculated values can no longer be specified, since it is not clear from which space usage they must be derived. As a result, the calculated fields are cleared.

Adding spaces

You can add a space to a floor by following the below procedure:

Procedure

1. Go to Spaces.
2. On the action panel, click Add.

For a description of fields available at Spaces, refer to Space data fields.

3. Click Save.

   A new space is added.

Ending spaces

In Spaces & Workspaces , you can end a space. Ending a space also ends the associated space dimensions, space usages and occupancies. Any future space dimensions, space usages and occupancies are also deleted. Workspaces must be ended separately.

Procedure

1. Go to Spaces.
2. Select a space that you want to end.
3. On the action panel, click End space.
4. In the Enter values dialog box, enter a date in the End date field on which you want to end the space.

   If there are occupancies and assets are linked to the space a warning pop-up appears displaying the available number of occupancies and linked assets for the selected spaces.

5. Click Proceed to end the space or **Cancel** to cancel the operation.

   The space is ended and the associated space dimensions, space usages and occupancies are ended simultaneously.

> ℹ️ If you want to close multiple spaces simultaneously, you can use the **Action on selection** option. For more information on **Action on selection**, see *Fundamentals*.

Resuming spaces

Once a space is ended, it can be resumed. You can also resume the space usage, workspaces and space dimensions of the same space.

1. On the action panel, click Resume space.

2. In the Enter values dialog box, specify the date in the Follow up date field. The space is resumed on the specified date.

3. Select Yes in the Resume space usage and Resume workspaces fields to resume the space usage and workspaces. Select No if you do not want to resume the space usage or workspaces.

4. Click OK.

   The Space end date field is empty.

5. Use Action on selection to end or resume several spaces simultaneously.

> For more information on **Action on selection**, refer to the *Fundamentals* documentation.

6. Click OK.

   You have ended or resumed multiple spaces.

Searching unoccupied spaces

- In order to quickly retrieve all (partly) unoccupied spaces, you can use the **Search spaces** button. Select the **End search** option to stop your current search and define a new search.

> This filter function also works in conjunction with the CAD Integrator .

Procedure

1. Go to Components > Spaces.

2. Set the required reference date. For details, see Setting the reference date.

3. In the element list toolbar, click the Search button. 🔍 The Search spaces dialog box appears.

4. Select the required search option (Space usage or Workspace).

5. Specify the search criteria. For details on searching by space usage, see Searching by space usage. For details on searching by workspace, see Searching by workspace.

6. Click OK, all entirely or partially unoccupied spaces from the selection will be displayed.

   Searching by space usage

If the **Space usage** option is selected, the following search criteria can be entered:

Search spaces   ✕

Search for unoccupied spaces by

⦿ Space usage ◯ Workspace

Search criteria

Reference date: 11/23/2021

Search for spaces having:

☑ Space dimensions (Net m²) - Sum (Space usages ... >= 10

    ☐ Include additional area

☐ and remaining area   >=

☐ and free workspace (space usage)   >=

- **Space dimension (Net m²) – Sum (space usages Net m²):**

  The minimum free area of the space (net area of the space dimension minus the sum of the net area of the linked space usages). By checking the **Include additional area** option you can also include the additional area in the calculation.

- **Remaining area: (= remaining surface area)**

  This is the net area of the space dimension on the reference date minus the sum of the required area based on the function of the persons linked to the space;

- **Total number of free workspaces:**

  The minimum number of free workspaces needed by all the people linked to the space. This is the sum of the number of workspaces of the space usages on the reference date minus the number of persons linked to the space.

Searching by workspace

If the **Workspace** option is selected, the following search criteria can be entered:

Search spaces   ✕

Search for unoccupied spaces by

◯ Space usage   ⬤ Workspace

Search criteria

Reference date: 11/23/2021

Search for spaces having:

☑ Number of (partially) unoccupied workspaces	>=	3
☐ and total area of unoccupied workspaces (m²)	>=	
☐ and total area of available workspaces (m²)	>=	
☐ and total number of workspaces in this space	>=	

> ℹ This filter function also works in conjunction with the CAD Integrator.

A number of search criteria can be entered. These are:

○ Number of (partially) unoccupied workspaces;

○ Total number of unoccupied square meters/feet for the workspace on the reference date. This is the sum of the available space minus the sum of the required area;

○ Total number of available square meters/feet of all workspaces on the reference date;

○ Total number of workspaces in the space on the reference date (both occupied and unoccupied).

After selecting criteria and clicking **OK**, all spaces whose workspaces meet the search criteria are displayed. If there are no workspaces that meet the set criteria, the elements list is displayed blank.

Deactivating a space temporarily and verifying data

It may be required to make a space temporarily inactive, for example because it is being renovated.

You can temporarily 'deactivate' a space by ending the space and resuming it at a future date. The period between ending and resuming the space is the 'inactive' period of the space. Whether a space is 'active' or not on a specific date can be verified from records on the **Space dimensions** layout, by checking if the field **Active?** is set to **Yes** or **No**.

> ℹ This information is stored on **Space dimensions**, because this data cannot have time gaps and can therefore always be retrieved from the system.

The information from the **Space dimensions** step > **Active?** field is used to hide / show spaces:

- in system reports (**Space analysis**, **Charge back space usage**, **Differences in space dimensions**, etc.)
- during space mapping in **CAD Integrator** view
- in pop-ups (filter option to show available spaces for a selected date)

What is actually shown or hidden depends on the selected reference date.

P r o c e d u r e

1. Go to Spaces & Workspaces .
2. At the Spaces level, select the space you want to 'deactivate'.
3. On the action panel, click End space.
4. From the date picker, select the date on which you want to end the space.

In this example, the current date (Today) is selected.

5. Go to Space details > Space usage and notice that no space usage or space dimensions are displayed for Today's reference date.

> ⓘ Change or deactivate the **Reference date** filter, to see past space usage or past space dimensions.

6. Return to Spaces, with the same space selected.
7. On the action panel, click Resume space.
8. In the date picker, select a Follow up date and specify if you also want to resume the space usage and workspaces.

In this example, the space is resumed a week after it was ended.

9. Click OK.
10. Go to Space details > Space usage and Space details > Space dimensions.

    New space usage and space dimensions records are added for the specified follow up date. On the Space dimensions step, there is an additional record for the week during which the space was ended and there was no space usage. The field Active? on that record displays No, to indicate that the space was inactive for a week.

Creating filters displaying future or ended elements

You can use a reference date macro in extensive filters, which can be used to filter out completed or future elements. These elements may be spaces, space dimensions, space usage, floors, floor attributes, workspaces, and occupancies.

The reference date macro (&referencedate) can be used to create relative filters that use the reference date to filter out elements with specific start dates or end dates.

The effect of filters including a reference date macro depends on the selection between **Deactivate reference date** and the **No reference date active!** options. If the **No reference date active!** option is selected, all elements which comply with the current reference date AND which meet the set filter criteria, will be displayed. If the **Deactivate reference date** option is selected, all present, past and future elements that meet the filter criteria will be displayed.

For general information on using the filter bar, refer to *Fundamentals*.

To apply reference date macro, &referencedate in filters in order to find future or ended spaces:

Procedure

1. Go to Spaces.
2. Click Add filter button in the filter bar.

   The **Select filter criteria** window appears.

3. In the Filter name field, type an relevant name for the new filter.
4. To create a filter on future spaces, select the ›= operator and type &referencedate in the Start date field:

This filter will produce all spaces that have a start date that is identical to or later than the reference date.

Or

To create a filter on ended spaces, select the ‹= operator and type *&referencedate* in the **End date** field:

This filter will produce all spaces that have an end date that is identical to or earlier than the reference date.

5. Click OK to save the filter.

6. You can now apply the new filter.

   Similar filters including the reference date macro can be created for other elements in Spaces & Workspaces , provided that they are reference-date-sensitive. Examples are: floors, floor attributes, space usage, space dimensions, workspaces, and occupancies. The macro can be typed in the date fields of the **Select filter criteria** window corresponding with the elements mentioned.

Calculating surface area

The total sum of the various surface areas of one or more selected spaces can be retrieved by using the **Area calculations** action.

Procedure

1. At Spaces, select the space(s) whose area you want to calculate.

2. Click Area calculations on the action panel.

   The Area calculations dialog box appears, stating the totals of all surface area calculations for the selected element(s) on the current reference date. This dialog box only displays fields that are present on the Space usage layout and that contain a value. Also, you must have the right authorization to see these fields. The results of floor size or space size calculations depend on which element(s) have been selected and on which filters have been applied.

Generating QR codes for spaces

It is possible to generate **QR codes** for one or more spaces which can be scanned using Planon apps. These QR codes are scanned by the mobile app users to:

- Book a space

- Report an incident

- Check for any open incidents on assets in that space

Procedure

1. Go to the Spaces selection level.

2. From the list of spaces, select one or more spaces for which you want to generate a QR code.

If multiple items are selected, different QR codes are created for different spaces.

3. On the action panel, click Generate QR code.

   The following screen appears:
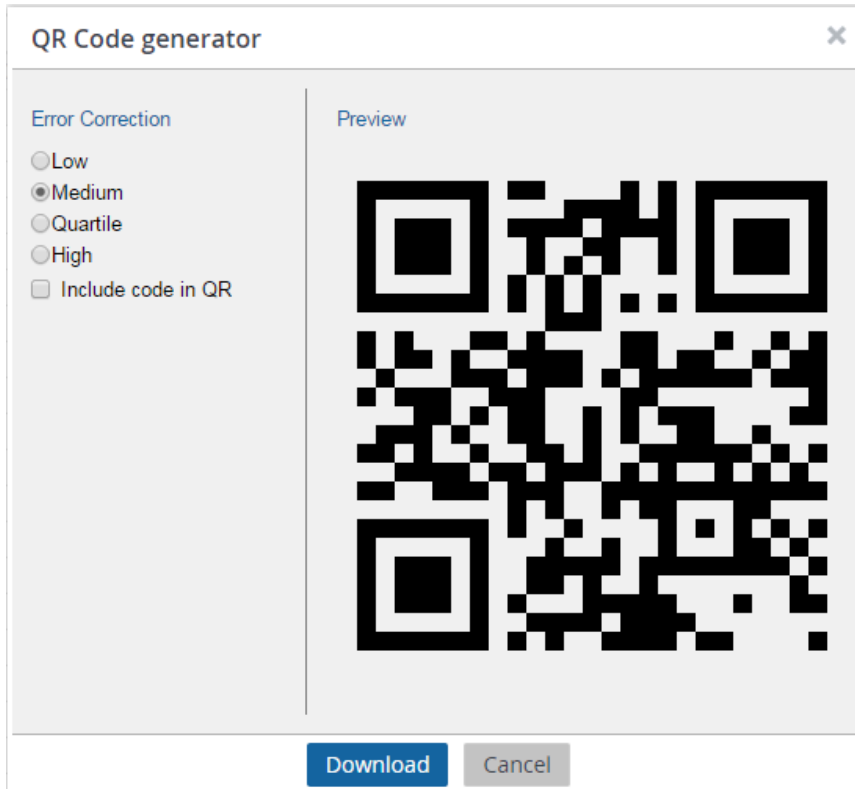
The image size is set to Extra-large by default.

4. Set the Error correction level to Low, Medium, Quartile or High. The error correction level of the QR code depends on what level you select.

> ℹ️ It is recommended to select **Medium**. Codes generated in the medium level can be scanned faster by the apps and are good for office environments.
> If there is a need to create QR codes for industrial places, select the **High** error correction level. At this correction level, codes can be scanned even if they are partly covered. The scanning, however, will take more time.

5. Select the Include code in QR option if you want to include the code in the image.

Select this option only if it is necessary, as the code will be included in the file name of the image anyway. It is recommended to uncheck the Include code in QR option as the dimensions of the image will be disturbed when the code number is included.

A folder named *QR-codes-ROOM.zip* contains *QR-codes.csv* file and QR codes, will be downloaded in the downloads folder of your computer. Extract the files from the *.zip* file to view the generated *QR-codes.csv* and QR codes.

> ⚠️ The generated codes are stored in *.png* extension format and are transparent. It is not possible to choose another file extension.

The generated QR code looks as follows:

6. Open the *QR-codes.csv* file to see data of the QR code.

Making a space reservable

The following procedure explains how you can turn an existing space into a reservable space for a specific period of time.

Procedure

1. In Spaces & Workspaces TSI, go to the Spaces selection level.

2. Select the space that you want to make reservable.

3. On the action panel, click Make space reservable.

   The Enter values dialog box appears.

4. Select a Start date-time and End date-time from the date pickers in these fields.

> The dialog **Enter values** box includes all the mandatory fields of the reservation unit. In Field definer , the functional application manager or a user with similar authorization can configure mandatory fields for spaces. These mandatory fields are also visible in the **Enter values** dialog box.

5. Select a relevant Order group and Space unit category for the reservable space.

6. Click OK.

   A linked reservation unit is created on the Reservation units selection step in the Reservations TSI, which makes the space reservable. The main fields of

the newly created reservation unit are automatically populated with data from the space.

For more information about space fields, see Space fields.

> You can end the reservability of a selected space by clicking **Make space non-reservable** on the action panel.

Working with floors

Copying floors

You can copy floors at Components > Floors.
This is especially useful if you want to enter a large number of floor attributes for a building whose floors are practically identical. You can even copy floors to another, similar, property. The **Zone** component, which is linked to spaces, is not copied in such cases, as zones are building specific.

Procedure

1. Select the relevant property and go Components.

2. On the Floors selection step, select the floor you want to copy.

3. On the action panel, click Copy.

4. The Copy floor dialog box appears where you can adjust a number of settings.

5. Enter the required data in the Destination section.

6. Select the property and floor you want to copy the floor attributes to.

7. In the Options section, indicate if you also want to copy the available spaces to the new floor.

   Additionally, you can indicate whether the space numbering should be modified to the number of the floor code by selecting the **Renumber space codes** option. This last option is only possible if each space number begins with the floor code.

   You can also choose to copy other floor related data. The level of detail, i.e. the number of floor related elements that are copied with the floor, can thus be increased. The most detailed level of copying includes copying space facilities, finishings, space usage and workspaces. Occupancy rates for workspaces are not copied.

8. Click the Copy option. The floor is copied. You will receive a confirmation message.

> ℹ The content of fields referring to CAD Integrator drawings is not copied.

Ending floors

You can end a floor if it no longer exists in the building or if you want to exclude it temporarily from any building related activities. Ending a floor also implies ending the spaces / active workspaces on that floor. Once the floor is ended, it will no longer appear in any pop-ups where you can select a floor. You cannot import a floor once it is ended.

> ℹ The Floor attributes > Active field indicates whether a floor is active. **Yes** indicates that the floor is available and **No** indicates that the floor is not available.

P r o c e d u r e

1. In Spaces & Workspaces , select the property in which you want to end a floor.
2. Go to the Components selection level.
3. On the Floors selection step, select the floor you want to end.
4. Go to the Spaces selection level and end all the spaces linked to that floor using Action on selection.

> ℹ For more information on how to end spaces, see Ending spaces.

> ⚠ The **End date** of a space must be on or before the **End date** of the floor.

5. After ending the spaces, go to Space details > Workspaces.
6. End all the workspaces linked to the floor, using Action on selection.
7. Go back to Components > Floors.
8. On the action panel, click End Floor.
9. In the **Enter values** dialog box, specify the End date on which you want to end the floor.

> ⚠ The **End date** must be on or after the **End date** of the spaces.

10. Click OK.

   The floor is ended.

Resuming floors

It is possible to resume a floor after it is ended.

P r o c e d u r e

1. In Spaces & Workspaces , select the property in which you want to resume a floor.

2. Go to the **Components** selection level.

3. On the **Floors** selection step, select the floor you want to resume.

4. On the action panel, select **Resume Floor**.

5. In the **Enter values** dialog box, specify the **Resume date** from which you want to resume the floor.

> The **Resume date** must be later than or the same as the **End date** of the floor.

6. Click **OK**.

   The floor is resumed.

Adding floor attributes

If you add a new floor in the **Floors** selection step at the Components selection level, floor attributes are automatically populated on the **Floor attributes** step for the set reference date. You can enter the remaining data yourself. For a description of these fields, refer to Floor attributes fields.

> Font sizes are default sizes if you open a drawing for the first time. After that you can store your own preferences.

> For details on defining and using texts and tooltips in CAD Integrator drawings, see the CAD Integrator and *Report Manager* parts of the Planon ProCenter user documentation.

• New floor attributes apply from the set reference date.

• After adding new floor attributes, the previous attributes are automatically ended.

• By changing the reference date, you can add or retrieve floor attributes in past, present and future.

• Floor attributes are consecutive elements, hence, overlaps are not allowed.

• You can modify the start date of a particular set of floor attributes. In this case, the end date of the previous set of floor attributes will also be altered.

• If the start date of a set of floor attributes is changed to an earlier date, the sequence of the various sets of floor attributes may be modified as well.

Working with space dimensions

The physical dimensions of a space can be registered at the **Space details** selection level > **Space dimensions** selection step. If there is only one space usage linked to a space, the space usage dimensions (entered in the **Space usage** step) are identical to the dimensions registered for the related space.

However, if multiple (simultaneous) space usage has been registered for a space, you must make sure that the sum of individual instances of space usage (on the **Dimensions** data tab in the **Space usage** selection step) corresponds with the space dimensions entered for the actual physical space (at the **Spaces** > **Space dimensions**).

For more information on space usage, refer to Working with space usage.

For a description of the various data fields available for space dimensions at the **Space details** > **Space dimensions**, refer to Space dimensions data fields.

Working with space usage

A space can have single space usage, multiple space usage or no space usage at all. Multiple simultaneous space usage is the most complex type of space usage.

Because spaces can be used in different ways, at different times and by different users (for example by various departments, cost centers, tariff groups), you can register the various kinds of space usage that exist in your organization in Planon and have these charged back separately to the appropriate department, cost center and so on. You can also visualize the existing space usage by applying space mapping in CAD Integrator .

> *User-defined space mapping* in CAD Integrator is the only type of space mapping that does not support *multiple* space usages.

It is possible to have new space usage automatically created when a new space is added. Your Planon administrator can make a setting to this effect in **Field definer** > **Business object settings**.

> For more information, refer to Making settings for the Spaces business object.

Procedure

1. Go to Spaces.
2. Select a space for which you want to add the space usage.

   Go to Workspaces & space data > Space usage.

3. On the action panel, click Add.
4. Fill in the data on the data panel.

For the description of the fields available for space usage, refer to Space usage data fields.
Many space usage fields are derived from the connected components at the Components selection level. Refer to the Components section for more details on their meaning.

5. Click **Save**.

> If you are adding a space usage record with multiple space usage records selected, only the space dimensions of the selected space will be copied to the new space usage record. All other space usage-related fields must be filled in manually.

Splitting a space usage

One method to create new space usage is splitting the existing space usage of a space.

To split a space usage, it must be active on the date of splitting.

1. Go to Workspaces & space data > Space usage.

2. Select the space usage you want to split.

3. On the action panel, click Split.

   The Enter values dialog box appears.

4. Specify the date on which you want to split the space usage.

5. Click OK.

6. In the element list, a new space usage is created with the date of the split as start date and the end date of the selected space usage as end date.

7. If no end date is specified, you can enter an end date as required.

8. In the data section, change the data that is relevant for the split. For example, if the space is going to be shared between two departments, modify the data in the Net floor area and Department fields, for both space usages.

9. Click Save.

   You have now split the space usage.

> • You can view the space usages which are active on the reference date in the **Space usage** level. After splitting, if the new space usage is not active on the reference date it is not visible in the element list. Deactivate the reference date in order to view all such space usages.
> • The selected space usage ends on the day preceding the date mentioned in the **Enter values** dialog box.
> • *User-defined space mapping* in CAD Integrator is the only type of space mapping that does not support multiple space usages.

Charging back space usage costs

In Planon ProCenter , space usage costs can be charged back to the relevant departments. Spaces can be categorized as being *direct* spaces used by a specific department only (such as an office) and general *indirect* spaces (such as a hallway). A general space can be shared between several departments and its costs charged back to the relevant departments / cost centers.

The **Charge back space usage** report calculates the usage costs of direct and indirect spaces, per department. For details, see Charge back space usage report.

You can specify how a space is charged back by selecting a space type. At the Components > Space types, you can specify a charge back method per space type.

Procedure

1. Go to Components **>** Space types.

2. Select the space type to which you want to link a charge back method.

3. Click the Select a value button next to the Charge back field to open the Charge back dialog box, where you can select the required charge back method. This dialog box contains the following options:

   ◦ **Do not charge back**: the space is not included in the rentable area.

   ◦ **Completely charge back**: the space can be completely charged to the user. This applies to a specific space (such as an office).

   ◦ **Proportional to floor area**: costs for general spaces (such as an elevator shaft) are proportionally divided amongst all users on each floor.

   ◦ **Proportional to floor area of property & subproperties**: costs for general spaces in a part of a building (property at the third level, such as a hallway in a particular part of a building that belongs to a complex of buildings), are proportionally charged back to all users in the relevant building part.

   ◦ **Proportional to floor area of main property**: costs for general spaces (such as the central front desk in building 1 – property at second level) that belong to the entire complex of buildings, are proportionally charged back to all users in the relevant building.

   ◦ **Proportional to floor area of complex**: costs of general spaces (the central reception of the entire complex of buildings – property at the first level) are proportionally charged back to all building users.

4. Click the option of your choice.

5. Click OK.

The selected charge back option is linked to the relevant space type.

Modifying space usage data from the Spaces selection level

You can modify space usage data, such as the department or cost center, from the **Spaces** selection level.

Procedure

1. Go to the Spaces selection level (in Data view or CAD Integrator).

2. Select the space(s) whose space usage data you want to modify (use Action on selection to select multiple spaces).

3. On the action panel, click Modify space usage. The Enter values dialog box appears.

4. In the Modification date field, specify the date on which the modification is to become effective. By default, the reference date is selected. Click OK to use this date.

5. To select another date, click Select a date button in the Modification date field, select the required date in the date picker and click OK.

The Modify space usage dialog box appears.

6. Modify the required Space usage field(s) and click OK to save your changes.

   The space usage field(s) is (are) now modified for the selected space(s).

> ℹ️ For this feature to work correctly, it is necessary that the **Split** action is available on the **Space usage** selection step. If not, you will get an error message. In this case, ask your Planon system administrator to make the **Split** action available on the **Space usage** layout.

Working with tariff groups

A tariff group can be linked to a space usage for the purpose of charging costs back to a particular department/cost center. You can also use tariff groups as a criterion for space mapping in CAD Integrator . The following subsection includes some useful information on working with tariff groups.

Start date and tariff per x days

Tariff groups are time-dependent. At the **Components** selection level you can specify time-related data for a selected tariff group in the **Start date** and **Tariff per X days** fields. By entering values in these two fields you determine a start date and on-charging period (in number of days) respectively, for the selected tariff group. A tariff group that has ended can be followed by a new, modified follow-up tariff group.

Follow-up tariff groups

You can use the action panel on the Components > Tariff groups step to add and delete tariff groups and follow-up tariff groups.

> For more information on adding and deleting elements, see *Fundamentals*. For more information on adding follow-up tariff groups see Adding a follow-up tariff group.

Adding a follow-up tariff group

The procedure for adding a follow-up tariff group differs from the usual procedure of adding an element and is therefore explained below:

Procedure

1. Click the Follow up option on the action panel.

2. The Enter values dialog box appears.

3. In the Follow up date field, enter a start date for the new follow-up tariff group.

   The reference date is given as default.

4. In the New code field, a code is automatically generated.

5. Indicate whether the new follow-up tariff group should also apply to the space usage and workspaces belonging to the original tariff group by selecting or clearing these options.

6. Click OK.

A 'copy' of the selected tariff group is created and saved under the name [Tariff group code_serial number].

If required, you can manually modify follow-up tariff group data.

When you add a follow-up tariff group for space usage:

- The start date of the space usage must be earlier than the start date of the follow-up tariff group.

- The end date of the space usage is later than the start date of the follow-up date or is unspecified.

- Data on the tariff group will be replaced by the new follow-up tariff group.

- The start date of the new space usage corresponds with the start date of the follow-up tariff group and the end date of the old space usage becomes the start date of the follow-up tariff group – 1 day.

⚠️ A tariff group cannot be deleted if any space usage is still linked to it.

When you add a follow-up tariff group for workspaces and occupancy:

- all workspaces in the current property set that are linked to the old tariff group will be checked and, if the following is true, the workspace is copied to a new workspace.

- The start date of the workspace is earlier than the start date of the follow-up tariff group, and…

- the end date of the workspace is later than the start date of the follow-up tariff group or is not specified.

  Any possible occupancy data for the workspace that meets this criteria will also be copied. The start date of the new workspace corresponds with the start date of the follow-up tariff group and the end date of the old workspace becomes the start date of the follow-up tariff group – 1 day.

⚠️ A tariff group cannot be deleted if workspaces are still linked to it.

Working with fixed workspaces

If you have the appropriate authorization, you can retrieve, add, copy and delete workspaces **Workspaces & space data** > **Workspaces**. Workspaces can also be ended and resumed.

For a description of the workspace fields, refer to Workspace data fields.

Ending and resuming workspaces

In Planon ProCenter workspaces can be ended and resumed, using the **End workspace** and **Resume workspace** actions. You can end and resume only those workspaces that are not linked to an active person moveline.

> ⚠ If you end a workspace, any linked occupancies will also be ended.

The following procedure explains how you can end a workspace and resume it.

Procedure

1. In the Workspaces selection step, select the workspace you want to end.
2. On the action panel, click End workspace, the Enter values dialog box appears.
3. Select a date on which the workspace should be ended.
4. Click OK. The workspace will be ended as per the date you just selected.
5. To resume the workspace, click Resume workspace on the action panel.
6. The workspace will be resumed on the date you selected.

> ⚠ If you resume a workspace, the previous occupancies are not resumed automatically. The workspace becomes available for a new occupancy.

If you want to find out which workspaces are still available, i.e. those which have no occupancy on the active reference date, you can go to the **Free workspaces** selection step. This selection step acts as a filter for free workspaces. The element section displays workspaces which have no occupancy linked to them on the active reference date.

Generating QR codes for fixed workspaces and make them bookable

You can generate **QR codes** for one or more fixed workspaces which can be scanned for various uses.

One very specific use case is to make regular, fixed workspaces *bookable*, for example through Planon apps, without the need to turn them into flexible workspaces. This way you do not have to choose whether the workplace is ultimately fixed or flexible and you do not have to replace the QR code stickers. However, to make fixed workspaces bookable, some additional configuration is required.

Preconditions for making fixed workspaces bookable

You must link the fixed workspace that you want to make bookable to a *flexible workspace* in Planon ProCenter > Reservations > Graphical planner (data view) > Flexible workspaces, via the **Workspace** reference field.

⚠️ Workspace QR code generation will only work properly if the workspace codes are *unique* within a property.

Mobile app users can scan workspace QR codes to:

- Create reservations for a workspace registered as a 'fixed' workspace in Planon
- Report an incident on that workspace
- Check for any open incidents related to that workspace
- Check in and claim the workspace

Procedure for generating the QR code

1. In Spaces & Workspaces , go to the Workspaces & space data selection level and select Workspaces.

2. From the list of workspaces, select one or more workspaces for which you want to generate a QR code.

If multiple items are selected, different QR codes are created for different workspaces.

3. On the action panel, click Create QR code. The following screen appears:
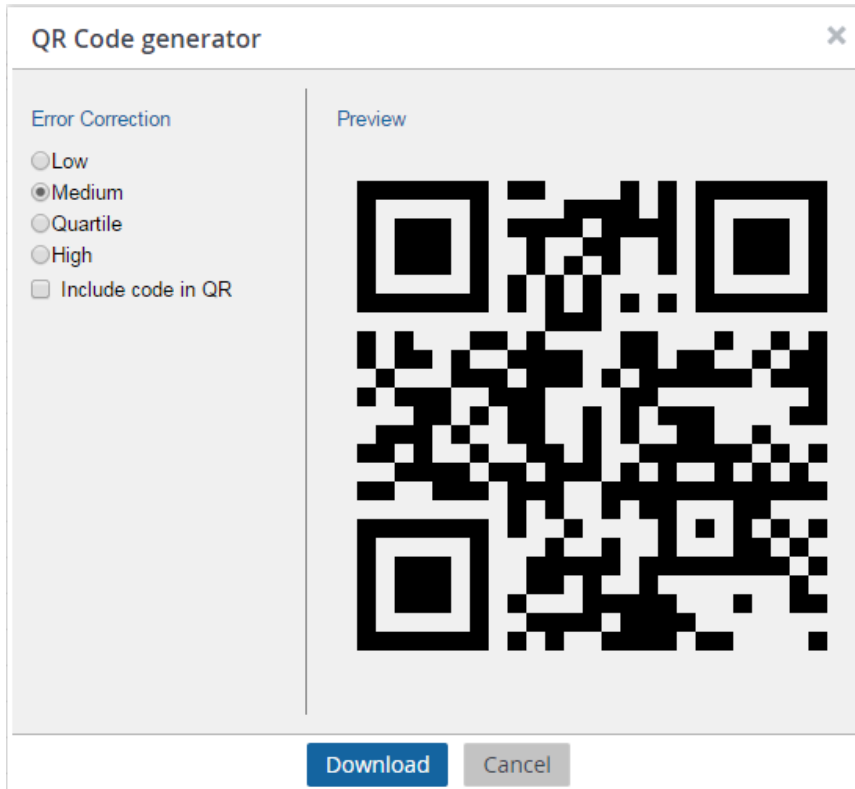
The image size is set to Extra-Large by default.

> ℹ️ When the **Reference date** is inactive, the **Create QR code** button is disabled for fixed workspaces. For more information on reference date, see Setting the reference date.

4. Set the Error correction level to Low, Medium, Quartile or High. The error correction level of the QR code depends on what level you select.

> ℹ️ It is recommended to select **Medium**. Codes generated in the medium level can be scanned faster and are good for office environments.
> If there is a need to create QR codes for industrial places, select the **High** error correction level. At this correction level codes can be scanned even if they are partly covered. The scanning, however, will take more time.

5. Select the Include code in QR option if you want to include the code in the image.

   Select this option only if it is necessary, as the code will be included in the file name of the image anyway. It is recommended to uncheck the **Include code in QR** option as the dimensions of the image will be disturbed when the code number is included.

6. Click on the Download option to generate the QR code.

A folder named *QR-codes-FIXEDWORKSPACE.zip* containing the *QR-codes.csv* file and QR codes, will be downloaded in the downloads folder of your computer. Extract the files from the *.zip* file to view the generated *QR-codes.csv* and QR codes.

> ⚠️ The generated codes are stored in *.png* extension format and are transparent. It is not possible to choose another file extension.

The generated QR code looks as follows:

> ℹ️ If a flexible workspace is linked to a fixed workspace and you use the **Print QR codes** action, the QR code of the fixed workspace is printed instead of the QR code of the flexible workspace.

7. Open the *QR-codes.csv* file to see data of the QR code.

Making a fixed workspace reservable

The following procedure explains how you can turn an existing fixed workspace into a reservable workspace for a specific period of time.

Procedure

1. In Spaces & Workspaces TSI, go to the Workspaces & space data selection level and select Workspaces.

2. Select the workspace that you want to make reservable.

3. On the action panel, click Make workspace reservable.

> ℹ️ The system checks whether the selected workspace already has a flexible workspace that is archived. In this case, the flexible workspace is retrieved from archive and updated with the new information.

A pop-up appears, click **OK** to retrieve the flexible workspace from archive.

The Enter values dialog box appears.

4. Select a Start date-time and End date-time from the date pickers in these fields.

> **i** In Field definer , the functional application manager or a user with similar authorization can configure mandatory fields for flexible workspaces. These mandatory fields are also visible in the **Enter values** dialog box.

5. Select an Order group to which the workspace belongs.

6. Click OK.

A flexible workspace is created on the Flexible workspaces selection step. The main fields of the newly created flexible workspace are automatically populated with data from the fixed workspace.

For more information about flexible workspace fields, see Flexible workspace fields.

> **i** You can end the reservability of a selected workspace by clicking **Make workspace non-reservable** on the action panel. Flexible workspaces will be archived when a fixed workspace is made unreservable, even if the flexible workspace is not system-created.

Working with occupancies

If you have the required authorization, you can record and maintain all kinds of data relating to the occupancy of workspaces at the **Occupancies** selection level.

For a description of the occupancy fields, refer to Occupancies fields.

Adding new occupancy data

The occupancy rate enables you to keep track of how efficiently a workspace is being used. Data about the functional area required by the workspace owners (employees), according to their positions (job) and occupancy rates, is automatically specified in Planon ProCenter .

Procedure

1. Select the workspace to which you want to add occupancy data, in either the Workspaces or the Free Workspaces step at the Space details selection level.

2. Go to the Occupancies selection level.

3. In the Owner field, select the name of the person who is going to use the workspace.

4. In the yes/no fields, specify the days of the week this owner occupies the workspace.

5. In the field Occupancy rate, enter the percentage of time the person spends at this workspace.

   The remaining fields on this tab are already specified automatically by Planon ProCenter . The required number of square meters / feet is specified in the Required area field based on the person's position.

6. Click Save.

   A value appears in the Occupancy rate field of the Workspaces step which corresponds with the total occupancy rate of all persons using the workspace. For example, if two people are linked to a workspace for the whole working week, the percentage 200 appears in the field.

Splitting an occupancy

You can create a new occupancy by splitting an existing occupancy of a workspace.

Procedure

1. Go to Space usage > (Free) Workspaces > Occupancies.

2. Select the occupancy record you want to split.

3. Click the Split occupancy on the action panel.

4. Enter the Split date. This is the start date of the new occupancy.

5. Click OK.

You have now split the occupancy. The new occupancy will inherit the data from the selected occupancy on the moment of the split. The end date of the selected occupancy record, active on the split date, will be changed automatically to one day before the start date of the new occupancy record. The end date of the new occupancy record will be the same as the original end date of the first selected occupancy record.

> ℹ After splitting, if the new occupancy is not active on the reference date, it is not visible in the element list. Deactivate the reference date in order to view all occupancies.

Working with workspace details

On the **Occupancies** level you find the **Workspace details** selection step. Here, you can add new workspace details or split existing workspace details.

Splitting a workspace usage

It is possible to insert a new workspace detail between two existing workspace details records.

The end date of the selected workspace details record, active on the split date, will be changed automatically to one day before the start date of the new workspace details record. The end date of the new workspace details record will be the same as the original end date of the first selected workspace details record.

Procedure

1. On the Space details level, select the (Free) Fixed workspaces selection step.
2. Go to Occupancies > Workspace details and select the workspace details record you want to split.
3. Click the Spliton the action panel.
4. Enter the Split date. This is the start date of the new workspace detail.
5. Click OK.

> The new workspace detail will inherit the data of the selected workspace on the moment of the split.

CAD Integrator in Spaces & Workspaces

This section provides basic information concerning CAD Integrator .

> ℹ For detailed information on working with CAD Integrator in Planon, see CAD Integrator.

Linking floor plans

Before you can start using CAD Integrator

- First link a digital FM drawing (*.ORJ file) and a constructional drawing as floor attributes to a selected floor at **Spaces** > **Floor attributes** > **FM drawing** and **Constructional drawing** fields. This allows you to work with CAD Integrator at the **Floors** > **Components**, or at the **Spaces** > **Spaces**.

- If you only want to view constructional data: make a link to an *.orj file in the **Constructional drawing** field, at the same selection level.

> ℹ By using CAD Import, AutoCAD drawings are converted to ORJ-format, a process that results in two files per drawing: a constructional and an FM drawing that can be viewed and edited in CAD Integrator .

Opening CAD Integrator

Before opening CAD Integrator , make sure that a digital FM drawing (*.ORJ file) and a constructional drawing are linked as floor attributes to a selected floor at Spaces > Floor attributes in the **FM drawing** and **Constructional drawing** fields.

Procedure

1. To view CAD drawings in Spaces & Workspaces   CAD Integrator , go to one of the following selection steps:

   ◦ **Components** > **Floors**

   ◦ **Spaces** > **Spaces**

   ◦ **Space details** > **Workspaces**

   Each selection level has context specific editing options.

2. Let's assume you want to view a drawing in the Spaces context:

3. Go to the Spaces selection level with the appropriate property and floor selected.

   The space or spaces for which you can open CAD Integrator are now displayed in the element section.

4. Click the CAD Integrator tab.

   The CAD Integrator drawing of the floor on which these spaces are located will be opened in CAD Integrator .

5. Apply the relevant options from the CAD Integrator drop-down menu to the drawing, for example: highlighting spaces, showing linked spaces, space mapping, determining layer configurations, etc. Switch on/off the 'Show constructional drawing' option in the CAD Integrator menu to view the drawing with or without constructional details. This setting is saved as a user setting for future use and is applied when the same user reopens CAD Integrator.

> **i** Apply hatch patterns to the various types of space, in order to make space mapping more effective. It is possible to apply a combination of hatch patterns along with different colors so that the hatch patterns are no longer displayed only in grays. The Hatch CAD Integrator field on elements such as department, cost center, space category etc, allows you to apply predefined hatch patterns to the selected spaces. After applying the hatch pattern, you can preview it in the **CAD hatch preview** field.

> **i** For more details on CAD Integrator , refer to CAD Integrator .

> **i** For more information on predefined hatch patterns, refer to Supporting data .

The following image shows an example of space mapping on departments, with various hatch patterns applied.

14 Columbus Square / 00 Ground

Space mapping per department or department level

Space mapping enables you to view CAD drawings of different (work)space details, such as a drawing per department or a drawing per department level. The below procedure is an example of space mapping on workspaces, by department.

Procedure

1. Go to Space details and select the Workspaces selection step.
2. Select a workspace and click the CAD Integrator tab.
3. Go to the CAD Integrator drop-down menu.
4. Select Workspace mapping followed by one of the following options:

   - **Departments (Workspace details)**

     Space mapping by department means that the CAD drawing highlights all relevant departments. Colors and hatch patterns for departments are configurable. The colors and hatch patterns can be linked to a department at the **Departments** selection level. If you have multiple department levels, the department mapping always uses the hatching of the department selected on Space usage. The color will change based on the department level mapping, but the hatch pattern will always stick to the selected department.

     > ℹ️ For more information on configuring colors and hatch patterns for CAD Integrator , see Supporting data .

   - **Departments Level 1**

     The CAD drawing only distinguishes the departments at the highest level. All departments on lower levels are assigned to this group.

   - **Departments Level 2**

     The CAD drawing only distinguishes the departments at the second highest level. All departments on lower levels are assigned to this group.

   - **Departments Level 3**

     The CAD drawing only distinguishes the departments on the third level. All departments on lower levels are assigned to this group.
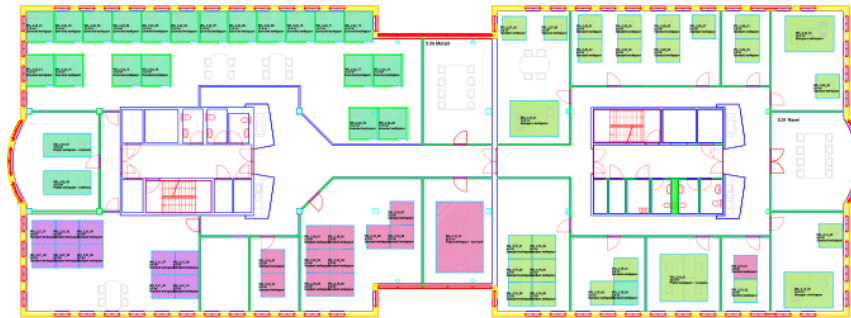
   - **Departments Level 4**

     The CAD drawing only distinguishes the departments on the fourth level. All departments on lower levels are assigned to this group.

> ℹ️ The colors and hatch patterns in the CAD drawing of the various department levels are derived from the colors and hatch pattern chosen at **Departments**.

14 Columbus Square / 02 Second

Reference date - 08/10/2015		
Departments (owner)	# Workspaces	Area [m²]
03, Research & Development	22	230.00
04, ICT	28	266.00
10, Facility Management	12	124.00
11, Maintenance Management	10	80.00
Total	72	700.00

Batch printing CAD Integrator drawings

You can download and convert CAD Integrator drawings as PDF files into a compressed (.zip) file and, if required, print them. This process is called 'batch printing'.

You can filter on specific components so that only specific spaces are colored/highlighted, and batch print them. For example, you can select space mapping for **Space occupancy** and filter on office spaces, so that you will see only office spaces on each floor.

> • If **Automatic coloring** is set to **Yes** in **CAD Integrator settings**, and when you batch print the drawings, same color is displayed across all floors for a space mapping type.
> • Batch printing can only be applied if there is at least one space from your selection in the **Spaces** element list.
> • You can download a maximum of 300 floor drawings.

Procedure

1. On the CAD Integrator actions panel, click the CAD Integrator batch print button.

   The Batch print options dialog box opens.
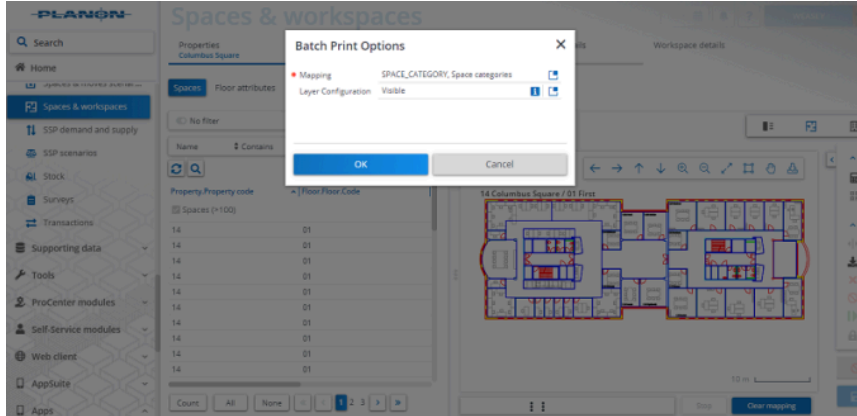
2. Select a mapping type from the space mapping list.

> You can only select one 'space mapping type' at a time for batch printing. However, you can select multiple properties in the **Properties** selection level and download the CAD drawings belonging to the same 'space mapping type' but of different properties.

3. To batch print CAD Integrator drawings as PDF files with layer configuration, select a layer configuration from the list and click OK.

To create, activate and delete a layer configuration, see Working with layers and layer configurations.

The Save to PDF dialog box opens.
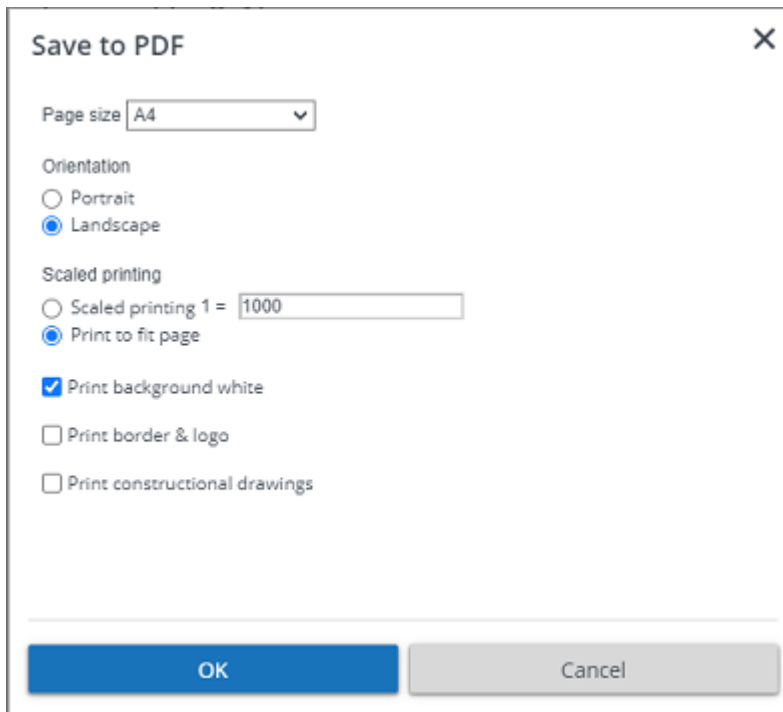
4. If required, set the page size, orientation, printing scale, background color, logo and indicate whether the construction drawing should be printed.

5. Click OK.

   The Processing batch print operation window opens and the process of compressing all the CAD Integrator drawing PDFs in the selected space mapping type begins. The progress of compression is displayed as a bar on the same window.

> ℹ️ The compression process is much fast if the batch printing window is the current window in the browser. If you navigate to any other window, the performance of the batch print decreases.

6. After the process is completed, click the Download zip button (which is activated) to download the compressed file in to your local drive.

   In the downloaded folder, you will find a folder for each selected property with CAD drawing PDFs (per floor).

BIM viewer in Spaces & Workspaces

The BIM (Building Information Modelling) viewer provides a 3D-representation of spaces, assets and building elements in a property. On selecting a space you will see the space's position in relation to other elements in the property.
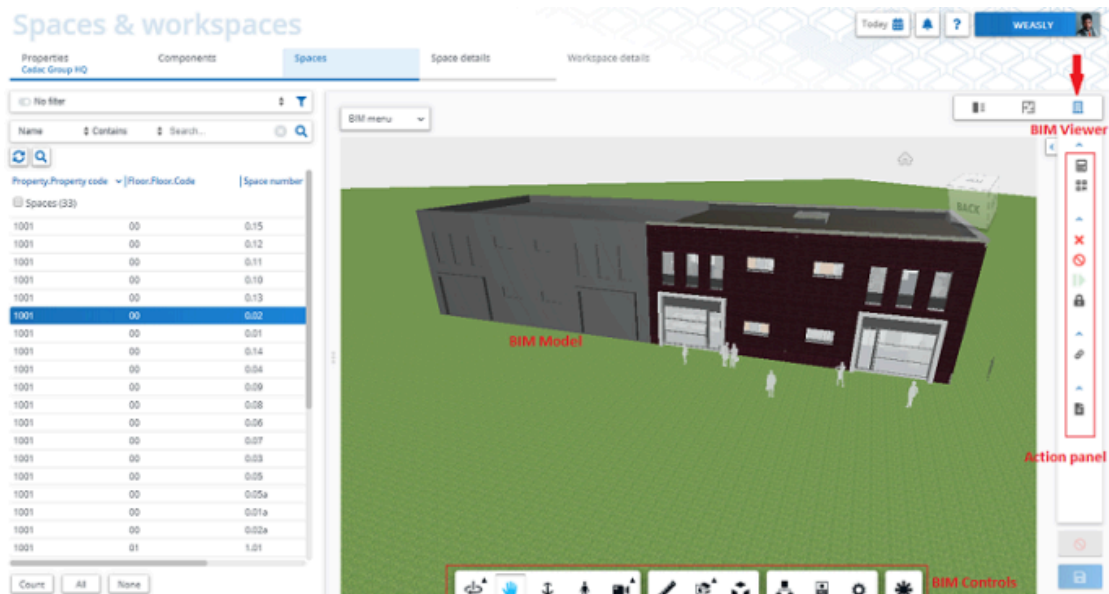
Selecting a space in the Planon elements list will highlight the linked space in the BIM viewer and vice-versa. The action panel is also available in the BIM viewer. Here, you can perform the same actions that are available when the data view is selected, such as ending / resuming a space, deleting a space, calculating the surface area etc. For more information on linking a space to a BIM object, see Linking BIM objects to spaces.

Modifying workspace details or occupancy data from the Workspaces selection level

At the **Workspaces** selection step, you can modify workspace details, such as the department, cost center and tariff group or you can modify occupancy data, such as the required area, occupancy rate and working days.

Procedure

1. Go to Space details > Workspaces (in Data view or CAD Integrator).
2. Select the workspace(s) whose details you want to modify (use Action on selection to select multiple workspaces).

3. On the action panel, click Modify workspace.

   The Enter values dialog box is displayed.

4. In the Modification date field, select the date on which the modification is to become effective. By default, the reference date is selected. Use the date picker to select a different date.

5. Select either Modify workspace details or Modify occupancy data.

6. Click OK.

   The Modify workspace details or Modify occupancy dialog box appears.

7. Modify the required Workspace details or Occupancies field(s) and click OK to save your changes.

   The workspace detail field(s) or occupancy fields is (are) now modified for the selected workspace(s).

> For this feature to work correctly, it is necessary that the **Split** action is available on the **Workspaces details** selection step and **Occupancies** selection step because these actions will create a split internally and the existing values will be replaced with the modified values. If the split action is not available, you will get an error message. In that case, ask your Planon system administrator to make the **Split** action available on the **Workspaces** layout.

Linking BIM objects to spaces

You can view a BIM model in Spaces & Workspaces . However, the spaces in the elements list are not automatically linked to the BIM objects in the BIM viewer.

You must first manually link spaces to BIM objects. When the links are created, you can click on the BIM model to select a space. If you click a space in the list the space is selected in the model.

Procedure

1. In the Spaces & Workspaces TSI, select a property (that is linked to a BIM model).

2. Go to Spaces and select BIM viewer.

The BIM model is displayed.

3. At the top left click the BIM menu.

4. Select the Link BIM objects option.

5. On the model, select a 'space object' to which you want to link a space.

For information on working with the BIM model, see Understanding BIM viewer.

The **Spaces** dialog is displayed, listing all the spaces in the selected property.

6. Select a space to which you want to link the BIM object and click OK.

The space and BIM object are now linked.

Neighborhoods

A neighborhood is a collection of spaces and workspaces that serve a common purpose of improving employee(s) experience in the workplace.

Instead of owning a desk, a neighborhood involves a membership concept, where an employee becomes a member of a neighborhood for a given period based on their role, activity, project, etc.

In Planon ProCenter , it is possible to create and manage a neighborhood:

- Link spaces and workspaces to a neighborbood

- Assign employees to a neighborhood via an occupancy record.

> **i** It is only possible to assign a space or workspace within the space to a neighborhood.

Roles using Neighborhoods :

- **Move manager**: The move manager is responsible for moving people and assigning people to different spaces and workspaces.

- **Space manager**: The space manager is responsible for all the spaces and workspaces. The space manager will also update Planon ProCenter through updating of the spaces and workspaces.

- **Office user**: An office user is a regular employee who would like to have a space or workspace to do their work.

Some examples for using neighborhoods are as follows:

- **Example 1:** Two spaces in the same floor are linked to a neighborhood.

- **Example 2:** A floor can have multiple neighborhoods.
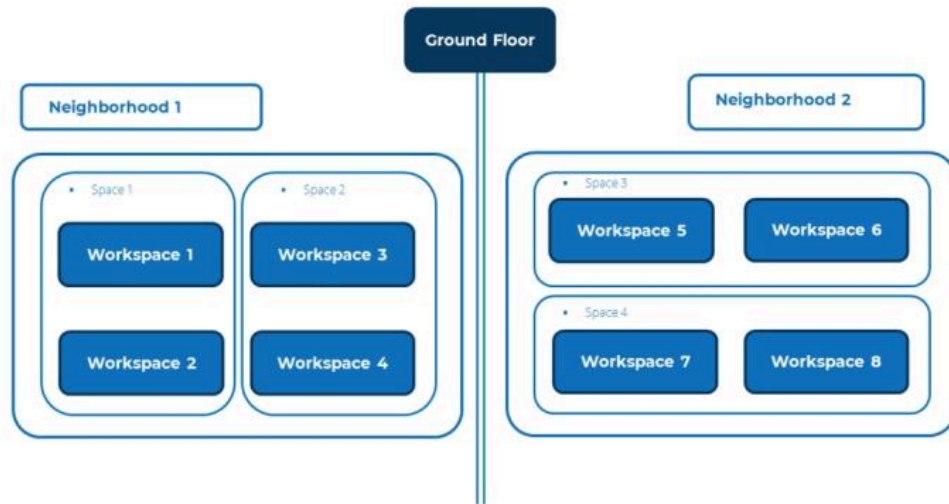
Concepts

The following topics describe the concepts that are key to understanding the functionality.

Neighborhood

A neighborhood is a collection of spaces and workspaces that serve a common purpose of improving employee(s) experience in the workplace.

Instead of owning a desk, a neighborhood involves a membership concept, where an employee becomes a member of a neighborhood for a given period based on their role, activity, project, etc.

Highlighting behavior in Neighborhoods

In **Neighborhoods** , spaces, workspaces and neighborhoods are highlighted based on your selection in the elements list and CAD Integrator drawing.

When you select a neighborhood in the elements list, the space(s) and workspace(s) linked to this neighborhood are highlighted in the drawing based on their area in the space usage.

Spaces & workspaces

Properties	Components	Spaces	Workspaces & space data	Occupancies
Columbus Square				

Floors Zones Space categories Space types Departments Cost centres Tariff groups Space standards **Neighbourhoods** Free attributes Communication logs - properties History

Columbus Square 02 Second

When you select multiple neighborhoods in the elements list, the space(s) and workspace(s) linked to these neighborhoods are highlighted in the drawing based on their area in the space usage.

Spaces & workspaces

Properties	Components	Spaces	Workspaces & space data	Occupancies
Columbus Square				

Floors Zones Space categories Space types Departments Cost centres Tariff groups Space standards **Neighbourhoods** Free attributes Communication logs - properties History

Columbus Square 02 Second

When you select one or more spaces or workspaces in the CAD Integrator drawing, the neighborhoods that are linked to the selected spaces or workspaces are highlighted in the elements list.

Working with neighborhoods

This section describes the various functions available.

Adding a neighborhood

In Spaces & Workspaces , you can add a neighborhood.

Procedure

1. Go to the Properties selection level, select the **Property** to which you want to add a neighborhood.
2. Go to Components > Neighborhoods.
3. On the action panel, click Add.
4. On the data panel, enter the required information.

   For information on the field descriptions, see Neighborhood fields.

5. Click Save.

   The neighborhood is added.

Ending a neighborhood

In Spaces & Workspaces , you can end a neighborhood.

Procedure

1. Go to Components > Neighborhood.
2. Select a neighborhood that you want to end.

> **i** Click 🔗 icon in the elements panel to show neighborhoods without spaces or workspaces.

3. On the action panel, click End neighborhood.

4. In the Enter values dialog box, select a date in the End date field on which you want to end the neighborhood.

5. Click OK.

   The neighborhood will be ended on the selected date.

> **i** If you want to end multiple neighborhood simultaneously, you can use the **Action on selection** option.

> **i** Ending a neighborhood results to end all related occupancies.

Linking person(s) to a neighborhood

To link person(s) to a neighborhood, proceed as follows:

Procedure

1. Go to Components **>** Neighborhood.

2. Select a neighborhood to which you want to link one or more persons.

3. On the action panel, click Link persons.

   The Link persons dialog box appears.

4. In the Link persons dialog box, select the person(s) you want to link to a neighborhood.

5. Click OK.

   The person(s) is/are linked to and now *belong* to a neighborhood.

> **i** When a person is added to a neighborhood, an **Occupancy** record is created on the Details > Occupancy selection level.

Linking space(s) to a neighborhood

To add space(s) to a neighborhood, proceed as follows:

Procedure

1. Go to Spaces.

2. Select the space(s) that you want to link to a neighborhood.

> **i** • If you want to perform an action on multiple spaces simultaneously, you can use **Action on selection**.

> • The start date of the selected space must be equal to or later than the start date of the neighborhood. If the space's start date is earlier than the neighborhood's start date, a new space is created automatically with the latest start date.

3. On the action panel, click Modify space usage.

   The Enter values dialog box appears.

4. By default, the reference date is selected in the Modification date field. To select another date, click **Select a date** button and select the required date in the date picker on which the modification is to become effective. Click OK.

   The Modify space usage dialog box appears.

5. Select a neighborhood in the Neighborhood field and modify the required **Space usage** field(s).

For more information on space usage fields(s), see Space usage fields (Spaces and workspaces).

6. Click Save.

   The Question dialog box appears.

7. Select Yes, if you want to change this space to a shared space or select No and click Proceed.

   A new space is created with the latest Start date and linked to a neighborhood.

Linking space(s) using the split action

To add space(s) to a neighborhood using the **Split** action, proceed as follows:

Procedure

1. Go to Spaces.
2. Select the space(s) that you want to link to a neighborhood.

> ℹ️ If you want to perform an action on multiple spaces simultaneously, you can use **Action on selection**.

> ℹ️ The start date of the selected space(s) must be equal to or later than the start date of the neighborhood. If the space(s) start date is earlier than the neighborhood start date, the new space(s) is created by using split action.

3. Go to Workspaces & space data > Space usage.
4. On the action panel, click Split.

   The Enter values dialog box appears.

5. By default, the reference date is selected in the Split date field. To select another date, click **Select a date** button and select the required date in the date picker on which the modification is to become effective. Click OK.

A new space is created with the latest Start date.

6. Select a neighborhood in the Neighborhood field and modify the required **Space usage** field(s).

For more information on space usage fields(s), see Space usage fields (Spaces and workspaces).

7. Click Save.

   The Question dialog box appears.

8. Select Yes, if you want to change this space to a shared space or select No and click Proceed.

   The space(s) is/are linked to a neighborhood.

Linking workspace(s) to a neighborhood

To add workspace(s) to a neighborhood, proceed as follows:

Procedure

1. Go to Workspaces & space data **>** Workspaces.
2. Select the workspace(s) that you want to link to a neighborhood.

> ℹ️ If you want to perform an action on multiple workspaces simultaneously, you can use **Action on selection**.

> ℹ️ The start date of the selected workspace must be equal to or later than the start date of the neighborhood. If the workspace(s) start date is earlier than the neighborhood start date, a new workspace(s) is created automatically with the latest start date.

3. On the action panel, click Modify workspace.

   The Enter values dialog box appears.

4. By default, the reference date is selected in the Modification date field. To select another date, click Select a date button and select the required date in the date picker on which the modification is to become effective.

5. Select Modify workspace details option and click OK.

   The **Modify within selection - Workspace details** dialog box appears.

6. Select a neighborhood in the Neighborhood field and modify the required **Workspace details** field(s).

   For more information on workspace details fields(s), see Workspace details fields (Spaces and workspaces).

> **i** If workspace details is linked to a neighborhood and has an occupancies linked to it, when ending a workspace details results ending all the occupancies linked.

7. Click Save.

   The Question dialog box appears.

8. Select Yes, if you want to change this space to a shared space or select No and click Proceed.

   A new workspace is created with the latest Start date and linked to a neighborhood.

Linking workspace(s) using the split action

To add workspace(s) to a neighborhood using the Split action, proceed as follows:

Procedure

1. Go to Workspaces & space data **>** Workspaces.
2. Select the workspace(s) that you want to link the neighborhood.

> **i** If you want to perform an action on multiple workspaces simultaneously, you can use **Action on selection**.

> **i** The start date of the selected workspace(s) must be equal to or later than the start date of the neighborhood. If the workspace(s) start date is earlier than the neighborhood start date, the new workspace(s) is created by using split action.

3. Go to Workspaces details.
4. On the action panel, click Split.

   The Enter values dialog box appears.

5. By default, the reference date is selected in the Split date field. To select another date, click **Select a date** button and select the required date in the date picker on which the modification is to become effective. Click OK.

   A new workspace is created with the latest Start date.

6. Select a neighborhood in the Neighborhood field and modify the required **Workspace details** field(s).

   For more information on workspace details fields(s), see Workspace details fields (Spaces and workspaces).

7. Click Save.

   The Question dialog box appears.

8. Select Yes, if you want to change this space to a shared space or select No and click Proceed.

   The workspace(s) is/are linked to a neighborhood.

Using the neighborhood field in web forms

A **Neighborhood for occupancy** field can be added as a search field in the **My telephone directory** web definition and as a detail field in the **Publisher details** web definition. For more information on web definitions, see Web configuration.

Neighborhood field in the 'My telephone directory' web form

You can add **Neighborhood for occupancy** as a search field on the **Search block** of the **My telephone directory** web definition which is based on the **Personnel** TSI. The persons linked to a **Neighborhood** can be searched using this field.

Procedure

1. Go to Publisher > My telephone directory > Search block.

2. On the data panel, click ➕ icon.

3. Select the **Neighborhood for occupancy** field and add it to the **Search fields** list.
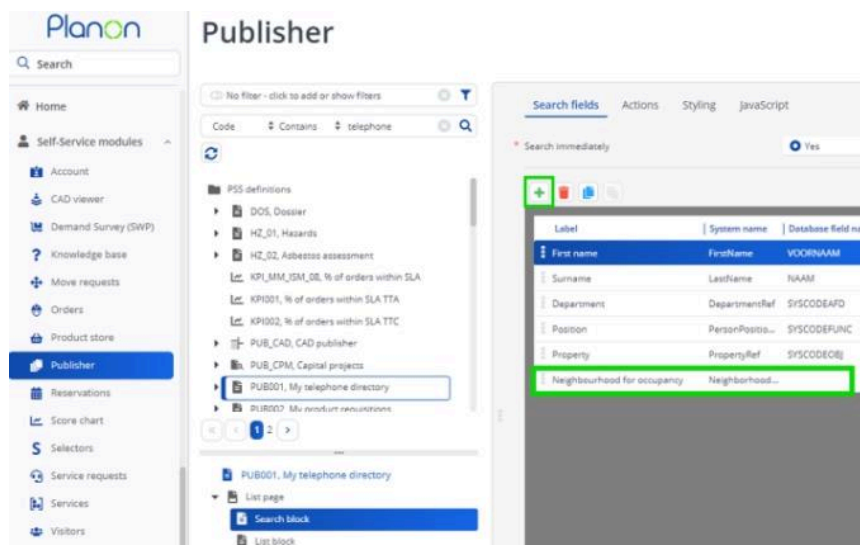
The **Neighborhood for occupancy** field is now available as a search field on the **Telephone directory** web form. End-users using this web form can search the **Persons** linked to a Neighborhoods using **Neighborhood for occupancy** search field.

Neighborhood field in the 'Publisher details' web form

It is possible to add **Neighborhood for occupancy** field on the **Details block** of the **Publisher details** web definition.

1. Go to Publisher > Publisher details > Details block.

2. On the data panel, click ➕ icon.

3. Select the **Neighborhood for occupancy** field and add it to the **Details fields** list.

Publisher

For end-users using the web form, the **Neighborhood for occupancy** field is displayed along with other detail fields on the **Details** page after clicking the **More details** link.

Publisher details

Personnel \ Personnel

Code

004

Surname

Cook

Initials

A

Prefix

First name

Alice

Neighbourhood for occupancy

01 - SWM Team

Back

Neighborhoods - Field descriptions

Neighborhood fields

Field	Description
Code	Enter a code for the neighborhood.
Description	Enter a description for the neighborhood.
Start date	Select the start date of the neighborhood.
End date	Select the end date of the neighborhood.
Neighborhood type	Select the type of neighborhood from the list.

Field	Description
	For example: Quiet working, Project working, Team based, and so on.
Linked space details	Displays the spaces linked to a neighborhood.
Linked workspace details	Displays the workspaces linked to a neighborhood.
CAD viewer color	Select the CAD viewer color from the list. When the CAD integrator is selected the linked spaces and workspaces are highlighted on the floor with the selected color in this field.
Metrics	
Fixed capacity	The fixed capacity is the sum of (the space usage of a space is assigned to the neighborhood where shared is set to **No** and the assignable is set is **Yes**) and (the workspace details are assigned to the neighborhood where shared is set to **No**).
	This field displays the value of the fixed capacity.
	ℹ️ If the space doesn't have a space type or the assignable is not set to **Yes**, the capacity will not be counted for Neighborhood.
Shared capacity	The shared capacity is the sum of (the space usage of a space is assigned to the neighborhood where shared is set to **Yes** and assignable is set is **Yes**) and (the workspace details are assigned to the neighborhood where shared is set to **Yes**).
	This field displays the value of the shared capacity.
Actual neighborhood capacity	The numerical value in this field represents the sum of fixed capacity and shared capacity.
Adjusted neighborhood capacity	The calculated numerical value in this field represents the adjusted capacity based on the target employee to desk ratio. The formula for the calculation is: (Shared capacity*Target employee to desk ratio) + Fixed capacity.
Actual employee to desk ratio	The calculated numerical value in this field represents the average number of people that are currently assigned to the one desk/workspace within a neighborhood. The formula for the calculation is: Headcount assigned to shared capacity / Shared capacity.

Field	Description
Target employee to the desk ratio	Enter a value (count) of people planned to assigned to a desk/workspace.
Headcount assigned to fixed capacity	Displays the value of the headcount assigned as fixed capacity.
Headcount assigned to shared capacity	Displays the value of the headcount assigned as shared capacity.
Number of linked spaces and workspaces	The numerical value in this field represents the sum of spaces and workspaces linked to a neighborhood.
Availability	The numerical value in this field represents the availability count of a neighborhood. The formula for the calculation is: Adjusted neighborhood capacity - Total occupancy count.

> The calculation of this value depends on the **Target employee to the desk ratio**, if this field is empty the calculation will be wrong.

Field	Description
Total occupancy count	The calculated numerical value in this field represents the sum of occupancy rates of all the occupancy records assigned to a neighborhood.

Reporting in Spaces & Workspaces

Planon ProCenter includes a Report Generator tool that can be used to create, edit, preview and print reports. Report Generator is available on various action panels in Spaces & Workspaces . With the appropriate authorization you can define your own reports or you can process predefined system reports.

See the link below for more information on the available system reports in Spaces & Workspaces :

- Using system reports

Using system reports

There are several predefined system reports available in Space Management, for example on the **Spaces**, **Space usage** and **Fixed workspaces** selection steps. The following procedure is an example of how you can open and preview a system report on spaces.

Procedure

1. Go to Spaces and select the space(s) that you want to include in the system report.

2. On the action panel, click Report.

   The Reporting window opens.

3. Click the System reports tab.

   Predefined system reports are displayed. You cannot modify a system report's design, but you can make several settings concerning the presentation and output of a system report.

> The **User reports** tab gives access to functionality with which you can create your own report definitions. For more information on creating user report definitions, see *Report Generator*.

4. Select the relevant system report.

5. Select relevant output options for your system report:

   - **Preview & print**: enables you to preview and print a version of your report.

   - **Export report**: enables you to select an export format. You can choose between the PDF, HTML, CSV formats and three different XLS formats;

Space analysis report

The **Space analysis** report enables you to analyze data that is directly linked to spaces, in relation to data that is linked to space usage.

The report is reference date dependent. This means that you compare data on space dimensions with data on workspaces and space usage dimensions.

The **Space analysis** report enables you to analyze the following items for the selected spaces on the set reference date:

- The difference between available workspaces and occupied workspaces

- The difference between the rentable area of the selected spaces and the rentable area assigned to space usage

- The difference between the required functional area and the available functional area in the selected spaces

- The occupancy rates of the available workspaces

- The occupancy rates of the available rentable area of the space.

  You can access the **Space analysis** report by descending to **Spaces** and then clicking **Report** on the action panel.

Report settings for the Space analysis report

In the **Report settings - Space Analysis** window, you can make several settings which generally determine which lines and details will be included in the report. The **Report settings - Space Analysis** window can be accessed via the **Edit report settings** option in the **Reporting** window. You can make settings in the following fields:

Group by

The **Group by** field enables you to specify the grouping of items in the report. You can choose to group the spaces in the report by floor or by property zone. The report will be sorted according to the following criteria: the property codes, the presence of space usage, the selected grouping and space codes.

Detailing

The **Detailing** field enables you to specify the detailing of items in the report. You can specify the type of detailing you want in the lines of the report. You can select the following options:

- **Hide space details**. Enabling this option means that information on individual spaces is left out;

- **Property totals only**. Enabling this option means that only totals per property are shown;

- **Whole report**. Enabling this option means that all details are shown in the report.

  Page breaks per property

This field enables you to specify if you want to have a page break per property. By default, this option is disabled.

Filter options for the Space analysis report

The **Filter** field enables you to specify filter options for the items in the report. If you click the dialog box icon in the **Filter** field, the **Select filter criteria** window will open. The fields in this window enable you to activate one or multiple filters to filter out spaces according to specific criteria:

- **Available area**: enables you to filter out spaces with an available rentable area of a specified size;

- **Diff. rentable area**: enables you to filter out the differences in rentable number of square meters/feet between spaces and space usage;

- **Free workspaces**: enables you to filter out spaces with a specified number of free workspaces;

- **Assignable**: enables you to filter out spaces of an assignable space type;

- **Occupied space**: enables you to filter out a specified percentage of occupied rentable area per space;

- **Occupied workspace**: enables you to filter out a specified workspace occupancy rate per space;

- **Space usage present**: enables you to filter out all spaces, or those with space usage, or those without space usage.

Columns in the Space analysis report

The **Space analysis** report contains various columns.

The columns are distributed among four groups, with each group header representing a specific category: **Space, Spaces usage, Space usage analysis** and **Occupied**.

The red triangles point to the group headers in the **Space analysis** report.

The red rectangle includes the actual column headers.

For a description of the meaning of the individual columns in the report, refer to Space analysis report columns

Charge back space usage report

The Space & Workplace Management (SWM) solution includes a system report called **Charge back space usage** that enables you to allocate the costs of space usage to building users proportionally over a specific period of time and if required according to a chosen standard.

You can access the **Charge back space usage** system report by going to **Spaces** and then clicking **Report** on the action panel.

The report provides an overview in square meters or feet (depending on the unit of measurement you have set) and in amounts (only if all spaces have a linked tariff group). The selected charging method for *indirect chargeable areas* as well as the way your property/building structure is set up, will influence the outcome of the report. For more information on the concepts used in this system report, see Concepts in the Charge back system report.

The totals in the report for amounts and surface area are calculated based on rounded numbers of the individual spaces. For each individual space, amounts are rounded on two digits and surface area on three digits.

The report is also extended with the possibility to divide indirect spaces according to the *BOMA-A* standard.

Concepts in the Charge back system report

Building common area and floor common area: *Building common area*, stands for those parts of the building whose costs are shared between *all* building occupants whereas *floor common areas* are surfaces whose costs are charged on to the occupants of a particular floor. The concepts *building common area* and *floor common area* play an important part in calculations of the *Charge back space usage* report.

BOMA standard: It is an international suite of measurement standards for building measurement. The BOMA-A standard is supported in the *Charge back space usage* report.

Charge back type: These are the charge back types used for the *Charge back space usage*.

0-Do not charge back	The space usage is not charged back at all.
1-Completely charge back	The surface area of the space usage linked to a space type is directly and 100% charged to the department or cost center to which the area belongs. For example, *offices*.
2-Proportional to floor area	The area of the space usage linked to a space type is charged back proportionally to spaces on the

	same floor, which are linked to charge back type 1 (completely charge back).

For example, *kitchens, corridors*. |
| 3-Proportional to floor area of property and sub properties | For this method, it depends on the hierarchical level at which your indirectly chargeable space is located in your property structure.

If the indirectly chargeable space is located at **Complex level**, the directly chargeable spaces at the complex level and all lower levels are included in the calculations.

If the indirectly chargeable space is located at a lower level, only those directly chargeable spaces are included in the calculations which are located at lower hierarchical levels than the indirectly chargeable space. |
| 4-Proportional to floor area of main property | For this method, it depends on the level at which your indirectly chargeable space is located in your property structure.

If the indirectly chargeable space is located at **Complex level**, the directly chargeable spaces at the complex level and all lower levels are included in the calculations.

If the indirectly chargeable space is located at a lower level then those directly chargeable spaces are included in the calculations which are located at the same level and at lower hierarchical levels than the indirectly chargeable space. |
| 5-Proportional to floor area of complex | For this method, it does not matter at which level your indirect space is located in your property structure, because the whole complex is included in the calculations. |

⚠ If all spaces are located at the third and lowest hierarchical level in the property structure, it is currently impossible in the report to search for the parent building and involve all sibling buildings in charging back costs for an indirectly chargeable space.

Common area: Common areas are those areas within a building that are available for common use by all building users, both the building occupants and their guests. For example, *corridors, hallways, lobbies*, and so on.

Directly or indirectly chargeable spaces: *Directly chargeable spaces* are paid directly by the users of those particular spaces. In addition, there are spaces for which the building occupants are indirectly charged, because they share them with other building users. The concepts *directly chargeable space* and *indirectly chargeable space* or in short 'direct' and 'indirect space' play an important part in the *Charge back space usage*

report. They are also reflected in the charge back types and you can select them from *Space type* of the space concerned.
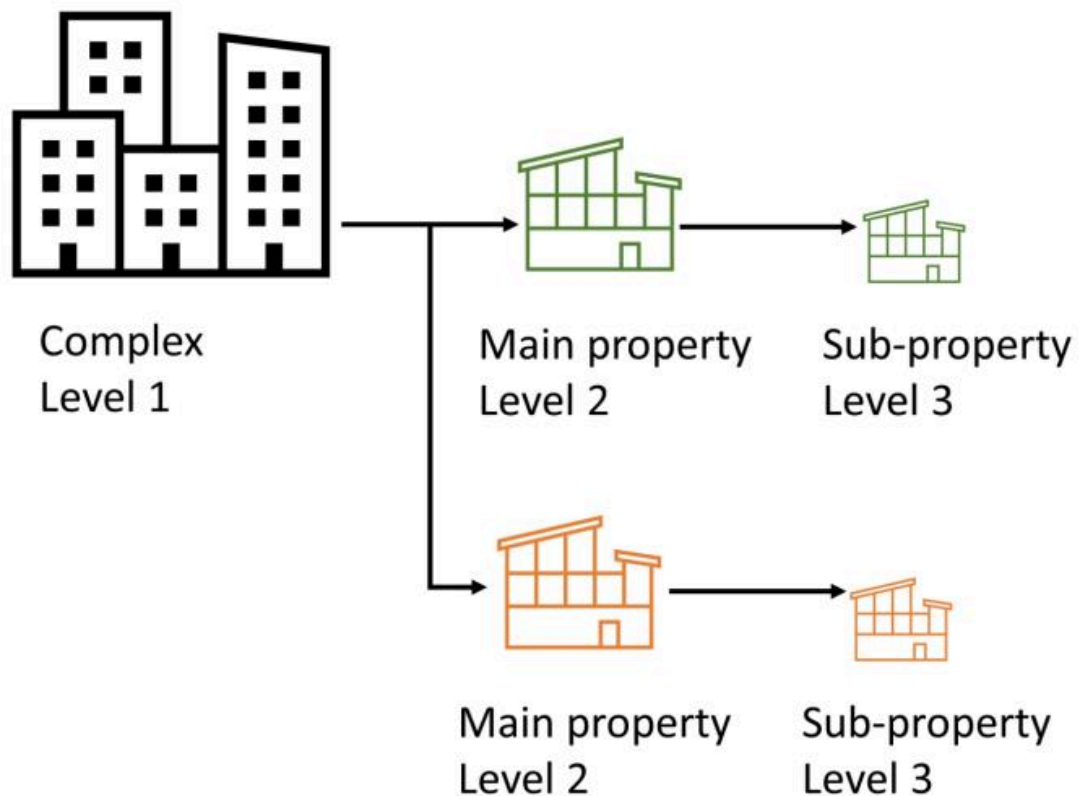
Space type: In the Spaces & Workspaces TSI >*Components selection level >Space types,* you can specify as many space types as you require. Each space type is defined by a code, name, color number, hatch pattern, and a charge back type.

Space usage: In Spaces & Workspaces > *Space details >Space usage* , you can link space usage to a space type. In the **Charge back space usage** report, the start date and end date of the space usage define for how many days the area of that space usage is taken into account.

Tariff group: In Spaces & Workspaces > *Components > Tariff groups*, you can specify a price per m2 (or ft2) per # days. This can be used in your *Charge back space usage* report, by linking each space usage to a tariff group (direct spaces *and* indirect spaces). Based on the selected **Area** field (Net, Gross or Rentable), on the reported period and on the actual space usage in the *Charge back space usage* report, the chargeable area is expressed in money.

Reports settings Charge back space usage report

> The Planon administrator can configure the layout of the **Settings** dialog box in TSIs > Layouts . For details on configuring layouts, see the TSIs documentation.

You can access the **Report settings - Charge back space usage** window by clicking **Edit report settings** in the **Reporting** window. Here, you can make these settings.

Title	Enter a report title. By default, the report name is populated.
Subtitle	Enter a subtitle here, if required.
Report start date & end date	Specify the reporting period by entering a start and end date. The 'valid' space usage between these dates is taken into account in the report. A 'valid' space usage must be specific as mentioned here.
	Space usage Start date less than or equal to the Reporting End date and the Space usage End date is greater than or equal to the Reporting Start date or the Space usage End date is empty.

> **i** If you drill down from one floor only, the other floors and sub-properties in the building will automatically be taken into account, with regard to the indirectly chargeable spaces. For example if the reception is on a different floor than the one you selected and the users of the selected floor also have to pay for that reception).

Report type

Surface area charged-back directly	This report type provides an overview of spaces that can be charged back directly (completely) to a department or a cost center.
	Only those space usages are included in the report which are linked to a space type with charge back type 1.
Surface area charged-back indirectly	This report type provides an overview of spaces that can be charged back indirectly, which are in fact the spaces that are shared between several departments or cost centers.
	Only those space usages are included in the report which are linked to a space type with charge back types 2, 3, 4 or 5.
Surface area charged-back directly & indirectly	All directly and indirectly chargeable areas are included in the report. That means that all space usages are included in the report which are linked to a space type with charge back types 1, 2, 3, 4 or 5.

Reported surface area: The field **Area type** allows you to specify the area type used in the report such as Net area, Gross area, and Rentable area.

Net area	The calculation of the directly and indirectly chargeable areas is based on the **Net area** field from the space usage (database: NOPP).
Gross area	The calculation of the directly and indirectly chargeable areas is based on the **Gross area** field from the space usage (database: BOPP).
Rentable area	The calculation of the directly and indirectly chargeable areas is based on the **Rentable area** field from the space usage (database: HOPP).

Display charge back costs: If you select *Yes* in this field, two extra columns are added in all report variants that display the calculated costs based on the linked **Tariff group**. The tariff group is linked at the associated space usage and in the **Area** field through the setting *Report surface area*. If you select *No*, only the area columns will be included in the report in all report variants. These are based on the 'area' field through the setting *Report surface area*. For more information, see Example of Charge back calculations.

ℹ Amounts can only be displayed if a tariff group is linked to the relevant space usage.

Displayed grouping: The **Displayed grouping** field enables you to specify the grouping of items in the report. You have these options.

No grouping	The Properties, Floors, Space types, and Spaces are reported in ascending order, based on code. No clustering is applied.
Cost center	Based on the linked Cost center of the *directly* back spaces (Charge back type 1). The report is grouped ascending, by cost center code.
Department	Same functionality as grouping by *cost center*, but now based on the linked department of the directly charged back spaces. The report is grouped ascending, by department group code.
Department (level 1, 2, 3, 4)	These options distinguish between departments at the highest, second highest or third highest level. All departments on lower levels are assigned to this group. Same functionality as for *department*, but totalized to the level 1, 2, 3 or 4 of the department structure.

Displayed detail: The **Displayed detail** field enables you to specify the detailing of items in the report. You can select which type of detailing you want in the report. You can choose between these options.

- Rentable unit

- Whole report
- Hide details
- Totals only

Example of Charge back calculations

Charge back calculations are charged on the areas such as direct area, building or floor common area and so on. For example; if we have a building with two floors, and each floor contains a number of spaces and some building/floor common areas. Now the charge back calculation is calculated on these spaces. This image explains how the report works.
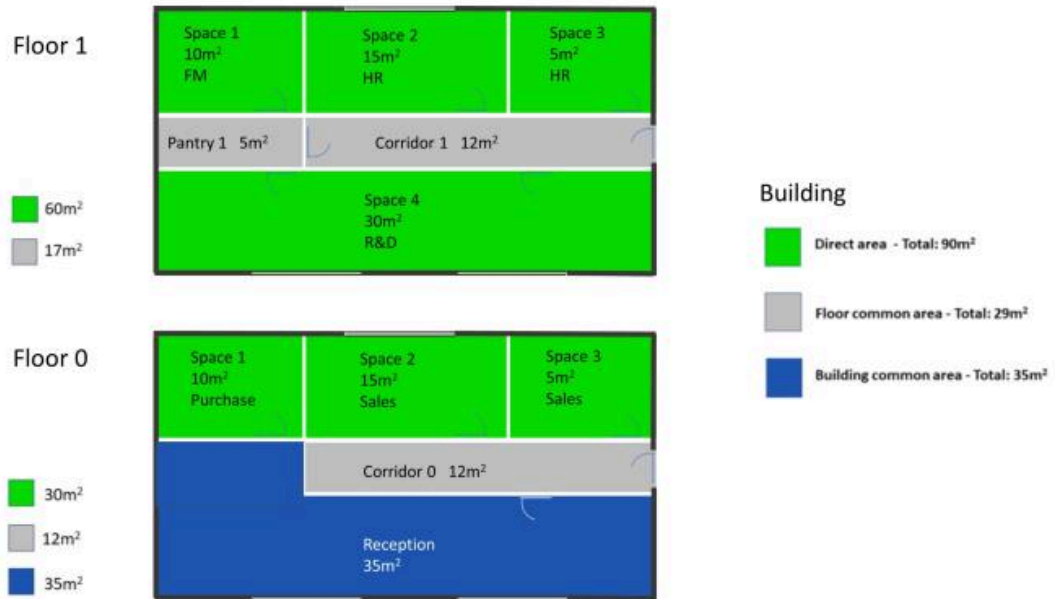
Directly chargeable area	Area which is charged back 100% to the user (= department / cost center).
Floor's common area	The surface area that must be divided between the directly chargeable spaces on the same floor.
Building's common area	The surface area that must be divided between the directly chargeable spaces in the entire building.

Method 1: Planon default

No Grouping (directly & indirectly chargeable areas)

	Start date	End date	Percentage	Weighted Direct m²	Weighted Indirect m²	Weighted m³	Weighted % (m²)
White, White house - surcharge building							
00, Ground							
DI, Direct Space							
Space 1				10.000	7.889	17.889	11.62 %
Space 2				15.000	11.833	26.833	17.42 %
Space 3				5.000	3.944	8.944	5.81 %
Total Direct Space				**30.000**	**23.666**	**53.666**	**34.85 %**
Total Ground				**30.000**	**23.666**	**53.666**	**34.85 %**
01, First							
DI, Direct Space							
Space 1				10.000	6.722	16.722	10.86 %
Space 2				15.000	10.083	25.083	16.29 %
Space 3				5.000	3.361	8.361	5.43 %
Space 4				30.000	20.167	50.167	32.58 %
Total Direct Space				**60.000**	**40.333**	**100.333**	**65.15 %**
Total First				**60.000**	**40.333**	**100.333**	**65.15 %**
Total White house - surcharge building				**90.000**	**63.999**	**153.999**	**100.00 %**
Total				**90.000**	**63.999**	**153.999**	**100.00 %**

In this example **directly and indirectly chargeable areas** are included in the report while *no grouping* is applied. The *Weighed direct m2* are reported 1:1. The *Weighed indirect m2* are a combination of common floor area and common building area. In these images you can see how the common floor areas and common building areas are assigned to the directly chargeable spaces on *floor 1*.

Division of floor common area

_____

Space 1	Direct	10	10
	Floor common	(10/60)*17	2.83
		total	**12.83**
Space 2	Direct	15	15
	Floor common	(15/60)*17	4.25
		total	**19.25**
Space 3	Direct	5	5
	Floor common	(5/60)*17	1.42
		total	**6.42**

Space 4	Direct	30	30
	Floor common	(30/60)*17	8.50
	total		38.50

Division of floor common area - graphical view
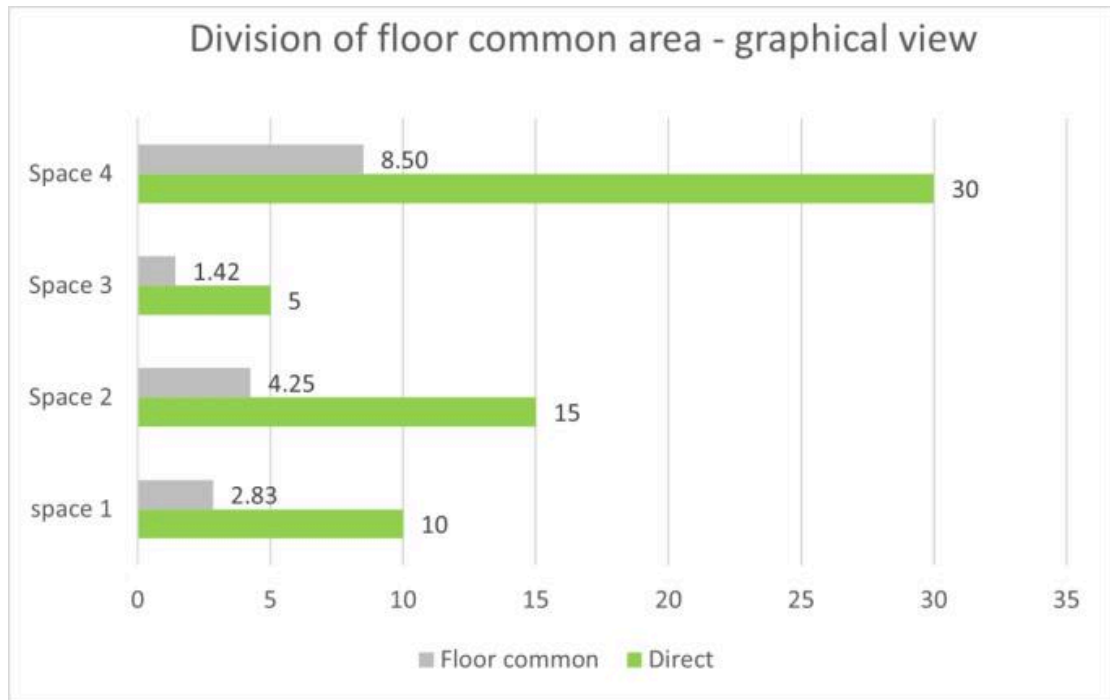
The end result is that each directly chargeable space gets some additional indirectly chargeable m2 from pantry, corridor and reception.

Division of building common area

Space 1	Direct	10	10
	Floor common	(10/60)*17	2.833
	Building common	(10/90)*35	3.889
	total		16.722
Space 2	Direct	15	15
	Floor common	(15/60)*17	4.250

	Building common	(15/90)*35	5.833
	total		25.083
Space 3	Direct	5	5
	Floor common	(5/60)*17	1.417
	Building common	(5/90)*35	1.944
	total		8.361
Space 4	Direct	30	30
	Floor common	(30/60)*17	8.500
	Building common	(30/90)*35	11.667
	total		50.167

Division of building common area - graphical view

Overview of calculations for the indirectly chargeable spaces
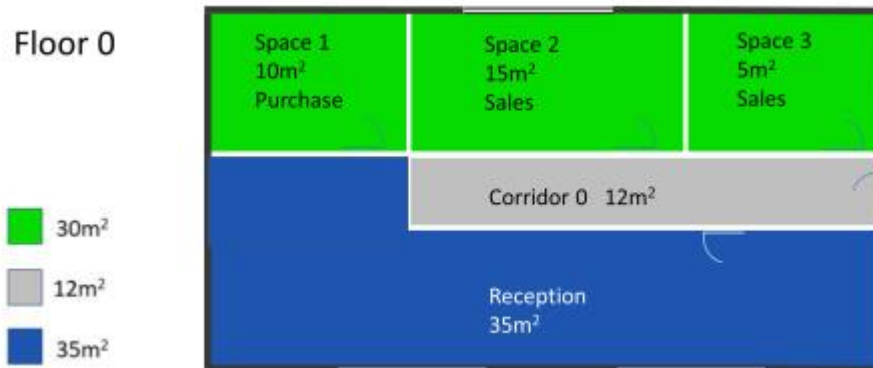
Space 1 (Purchase)

- (12 m2 of Corridor 0): (10 / 30 (=direct m2 on Floor 0)) x 12 = 4.0 m2

- (35 m2 of Reception): (10 / 90 (=direct m2 of Total building)) x 35 = 3.889

= 4.0 + 3.889 = 7.889

Space 2 (Sales)

- (12 m2 of Corridor 0): (15 / 30 (=direct m2 on Floor 0)) x 12 = 6.0 m2

- (35 m2 of Reception): (15 / 90 (=direct m2 of Total building)) x 35 = 5.833

= 6.0 + 5.833 = 11.833

Space 3 (Sales)

- (12 m2 of Corridor 0): (5 / 30 (=direct m2 on Floor 0)) x 12 = 2.0 m2

- (35 m2 of Reception): (5 / 90 (=direct m2 of Total building)) x 35 = 1.944

= 2.0 + 1.944 = 3.944

Floor 1

Space 1
10m²
FM

Space 2
15m²
HR

Space 3
5m²
HR

Pantry 1   5m²   Corridor 1   12m²

Space 4
30m²
R&D

■ 60m²

▢ 17m²

Space 4 (FM)	• (17 m2 of Pantry 1 + Corridor 1): (10 / 60 (=direct m2 on Floor 1)) x 17 = 2.833 m2
	• (35 m2 of Reception): (10 / 90 (=direct m2 of Total building)) x 35 = 3.889
	= 2.833 + 3.889 = 6.722
Space 5 (HR)	• (17 m2 of Pantry 1 + Corridor 1): (15 / 60 (=direct m2 on Floor 1)) x 17 = 4.25 m2
	• (35 m2 of Reception): (15 / 90 (=direct m2 of Total building)) x 35 = 5.833
	= 4.25 + 5.833 = 10.083
Space 6 (HR)	• (17 m2 of Pantry 1 + Corridor 1): (5 / 60 (=direct m2 on Floor 1)) x 17 = 1.417 m2
	• (17 m2 of Pantry 1 + Corridor 1): (5 / 60 (=direct m2 on Floor 1)) x 17 = 1.417 m2
	= 1.417 + 1.944 = 3.361
Space 7 (R&D)	• (17 m2 of Pantry 1 + Corridor 1): (30 / 60 (=direct m2 on Floor 1)) x 17 = 8.5 m2
	• (35 m2 of Reception): (30/90 (=direct m2 of Total building)) x 35 = 11.667
	= 8.5 + 11.667 = 20.167

No Grouping (direct & indirect area) – partial usage in reporting period

This example gives information on how directly and indirectly chargeable areas are reported while no grouping is applied.

Space 1 is only used between 1-8-2014 and 15-8-2014. The calculation takes this limited period into account. That is (15 days / 31 days (reporting period)) x 10 m2 = 4.839 m2. This also means that the entire building is weighted at 80+4.839=84.839 direct m2 and the floor 1 is weighted at 50+4.839=54.839 direct m2.

The calculations and results are shown in this table.

Space 2
- (17 m2 of Pantry 1 + Corridor 1): (4.839 / 54.839 (=direct m2 on Floor 1)) x 17 = 1.50 m2
- (35 m2 of Reception): (4.839 / 84.839 (=direct m2 of Total building)) x 35 = 1.996
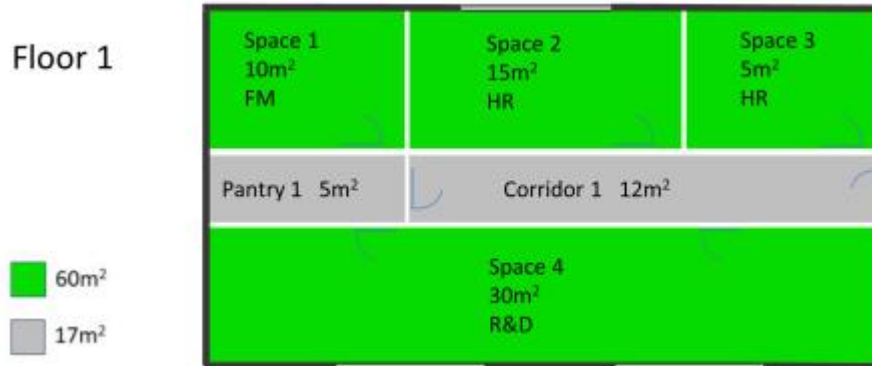
= 1.50 + 1.996 = 3.496

Space 1
- (12 m2 of Corridor 0): (10 / 30(=direct m2 on Floor 0)) x 12 = 4.0 m2
- (35 m2 of Reception): (10 / 84.839 (= direct m2 of Total building)) x 35 = 4.125

= 4.0 + 4.109 = 8.125

This report helps you to understand the calculations.

> ℹ See the start date and end date of Space1.

Surcharge Space Usage

Grouped by:
Net area
Period: 01/08/14 - 31/08/14

Printed on: 31/10/14

Space & work space mgt.

	Start date	End date	Percentage	Weighted Direct m²	Weighted Indirect m²	Weighted m²	Weighted % (m²)
White, White house - surcharge building							
00, Ground							
DI, Direct Space							
Space 1				10.000	8.125	18.125	12.18%
Space 2				15.000	12.188	27.188	18.27%
Space 3				5.000	4.063	9.063	6.09%
Total Direct Space				30.000	24.376	54.376	36.53%
Total Ground				30.000	24.376	54.376	36.53%
01, First							
DI, Direct Space							
Space 1	01/08/14	15/08/14	48.39	4.839	3.496	8.335	5.60%
Space 2				15.000	10.838	25.838	17.36%
Space 3				5.000	3.613	8.613	5.79%
Space 4				30.000	21.676	51.676	34.72%
Total Direct Space				54.839	39.623	94.462	63.47%
Total First				54.839	39.623	94.462	63.47%
Total White house - surcharge building				84.839	63.999	148.838	100.00%
Total				84.839	63.999	148.838	100.00%

In the following illustrations, you will see how the common floor areas and common building areas are assigned to the directly chargeable spaces on Floor 1.

Floor 1

Space 1
10m²
FM

Space 2
15m²
HR

Space 3
5m²
HR

Pantry 1 5m²

Corridor 1 12m²

Space 4
30m²
R&D

60m²

17m²

Division of building common area

(15d/31d)*10 m2 = 4.839 m2

Space 1	Direct	10	10
	Floor common	(10/60)*17	2.833
	Building common	(10/90)*35	3.889
	total		16.722
Space 2	Direct	15	15
	Floor common	(15/60)*17	4.250
	Building common	(15/90)*35	5.833
	total		25.083
Space 3	Direct	5	5
	Floor common	(5/60)*17	1.417
	Building common	(5/90)*35	1.944
	total		8.361

Space 4	Direct	30	30
	Floor common	(30/60)*17	8.500
	Building common	(30/90)*35	11.667
		total	50.167

Division of building common area - graphical view

Division of floor common area

(15d/31d)*10 m2 = 4.839 m2

Space 1	Direct	4.839	4.839
	Floor common	(4.839/54.839)*17	1.50
		total	6.34
Space 2	Direct	15	15
	Floor common	(15/54.839)*17	4.65
		total	19.65

Space 3	Direct	5	5
	Floor common	(5/54.839)*17	1.55
		total	6.55
Space 4	Direct	30	30
	Floor common	(30/54.839)*17	9.30
		total	39.30

Division of floor common area - graphical view
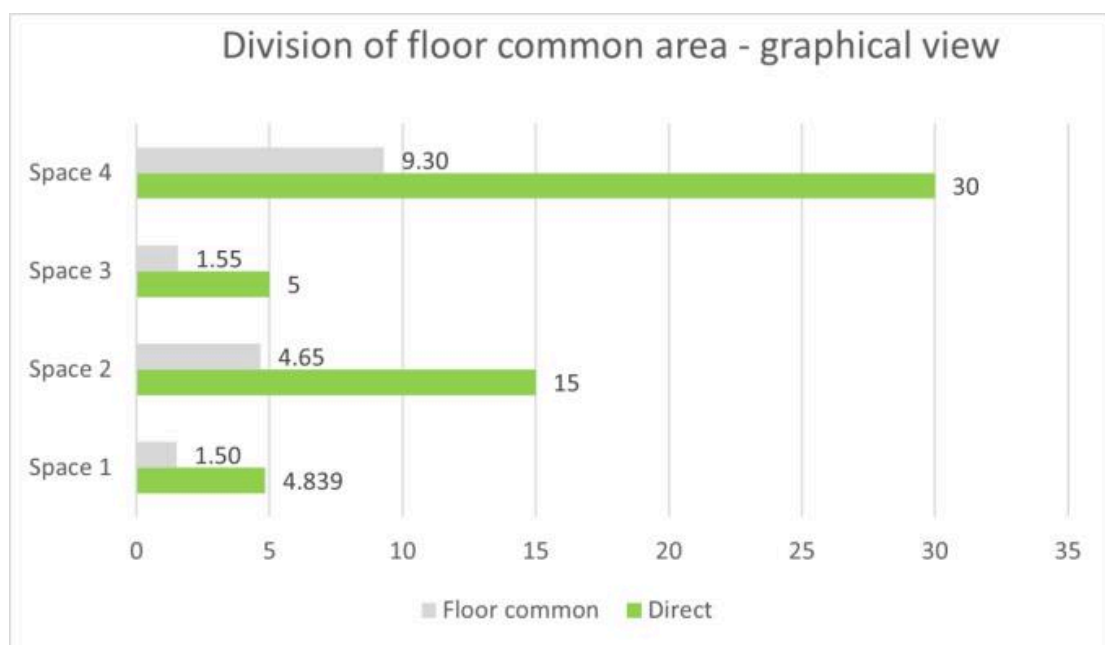
No Grouping (direct & indirect area) – partial usage during reported period + money

This report includes directly and indirectly chargeable areas that are reported while no grouping is applied. All space usage (directly and indirectly chargeable spaces) are linked to a tariff group that costs € 1 per m2 per day. In the report options, the option to display the costs also is switched on. As the reported period is 31 days (1-8-2014 to 31-8-2014), you can compare this report with the previous one, the only difference being that you have to multiply all values by 31 for the costs columns.

Surcharge Space Usage

Grouped by:
Net area
Period: 01/08/14 - 31/08/14

Printed on: 31/10/14

Space & work space mgt.

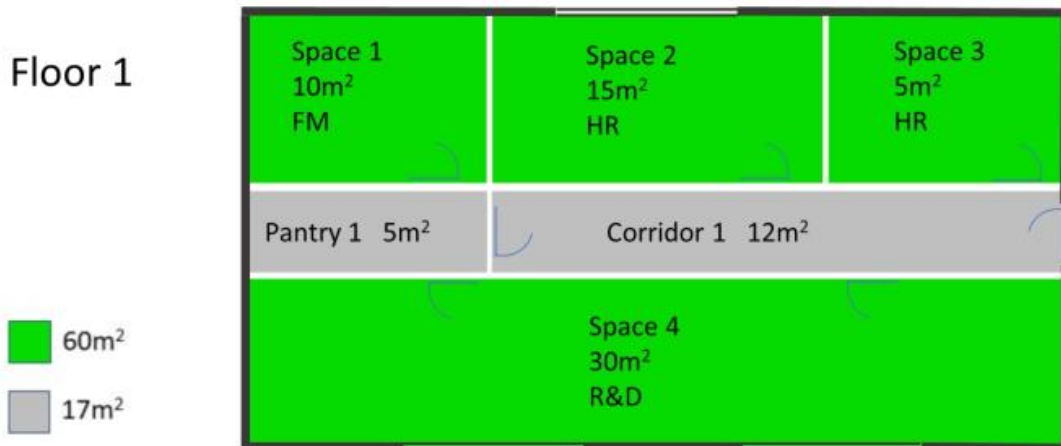|	Start date	End date	Percentage	Weighted Direct m²	Weighted Direct €	Weighted Indirect m²	Weighted Indirect €	Weighted m²	Weighted % (m²)	Weighted €	Weighted % (€)
White, White house - surcharge building											
00, Ground											
DI, Direct Space											
Space 1				10.000	310.00	8.125	251.89	18.125	12.18 %	561.89	12.18 %
Space 2				15.000	465.00	12.188	377.83	27.188	18.27 %	842.83	18.27 %
Space 3				5.000	155.00	4.063	125.94	9.063	6.09 %	280.94	6.09 %
Total Direct Space				30.000	930.00	24.376	755.66	54.376	36.53 %	1,685.66	36.53 %
Total Ground				30.000	930.00	24.376	755.66	54.376	36.53 %	1,685.66	36.53 %
01, First											
DI, Direct Space											
Space 1	01/08/14	15/08/14	48.39	4.839	150.00	3.496	108.38	8.335	5.60 %	258.38	5.60 %
Space 2				15.000	465.00	10.838	335.98	25.838	17.36 %	800.98	17.36 %
Space 3				5.000	155.00	3.613	111.99	8.613	5.79 %	266.99	5.79 %
Space 4				30.000	930.00	21.676	671.97	51.676	34.72 %	1,601.97	34.72 %
Total Direct Space				54.839	1,700.00	39.623	1,228.32	94.462	63.47 %	2,928.32	63.47 %
Total First				54.839	1,700.00	39.623	1,228.32	94.462	63.47 %	2,928.32	63.47 %
Total White house - surcharge building				84.839	2,630.00	63.999	1,983.98	148.838	100.00 %	4,613.98	100.00 %
Total				84.839	2,630.00	63.999	1,983.98	148.838	100.00 %	4,613.98	100.00 %

Method 2: BOMA-A

No Grouping (directly & indirectly chargeable areas)

The calculation for BOMA-A is 100% identical to the Planon default method with regard to directly chargeable areas and common floor areas. Only on the level of the common building area, the calculation is slightly different. In general, BOMA-A first adds up the common floor area to each directly chargeable area. Based on these areas (direct + common floor) the common building areas will be divided. For the common floor area calculation see Method 1: Planon default. For the common building area, the calculation of **Floor 1** is as follows.

Floor 1

Space 1
10m²
FM

Space 2
15m²
HR

Space 3
5m²
HR

Pantry 1   5m²

Corridor 1   12m²

Space 4
30m²
R&D

60m²

17m²

Division of building common area

Space 1	Direct	10	10

	Floor common	(10/60)*17	2.83
	Building common	(12.83/90+29)*35	3.77
	total		16.61
Space 2	Direct	15	15
	Floor common	(15/60)*17	4.25
	Building common	(19.25/90+29)*35	5.66
	total		24.91
Space 3	Direct	5	5
	Floor common	(5/60)*17	1.42
	Building common	(6.417/90+29)*35	1.89
	total		8.30
Space 4	Direct	30	30
	Floor common	(30/60)*17	8.50
	Building common	(38.5/90+29)*35	11.32
	total		49.82

Division of building common area - graphical view
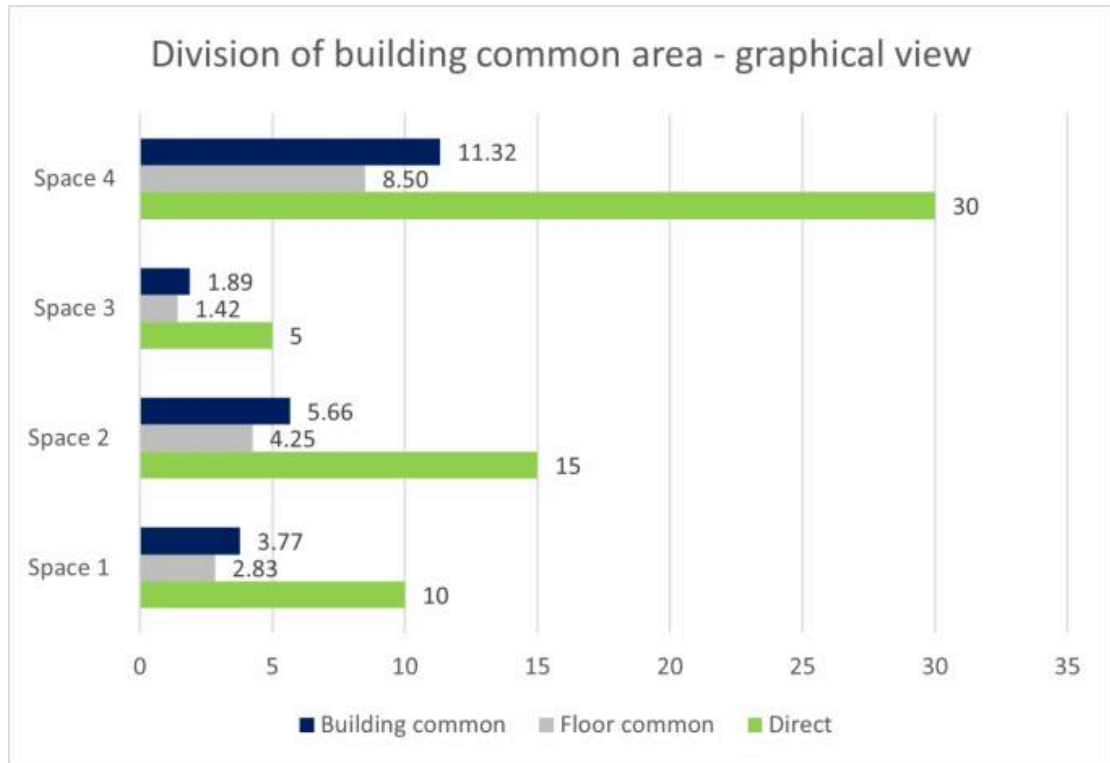
Division of building common area with reporting period

If Space **1** is only used from 1-8-2014 to 15-8-2014 and the reporting period is 1-8-2014 to 31-8-2014, the calculation looks like this.

(15d/365d)*10 m2 = 0.411 m2

Space 1	Direct	0.411	0.411
	Floor common	(0.411/50.411)*17	0.14
	Building common	(0.551/80.411+29)*35	0.24
		total	0.79
Space 2	Direct	15	15
	Floor common	(15/50.411)*17	5.06
	Building common	(20.006/80.411+29)*35	5.74
		total	25.80

Space 3	Direct	5	5
	Floor common	(5/50.411)*17	1.69
	Building common	(6.69/80.411+29)*35	1.96
	total		8.65
Space 4	Direct	30	30
	Floor common	(30/50.411)*17	10.12
	Building common	(40.12/80.411+29)*35	11.76
	total		51.88

Division of building common area - graphical view
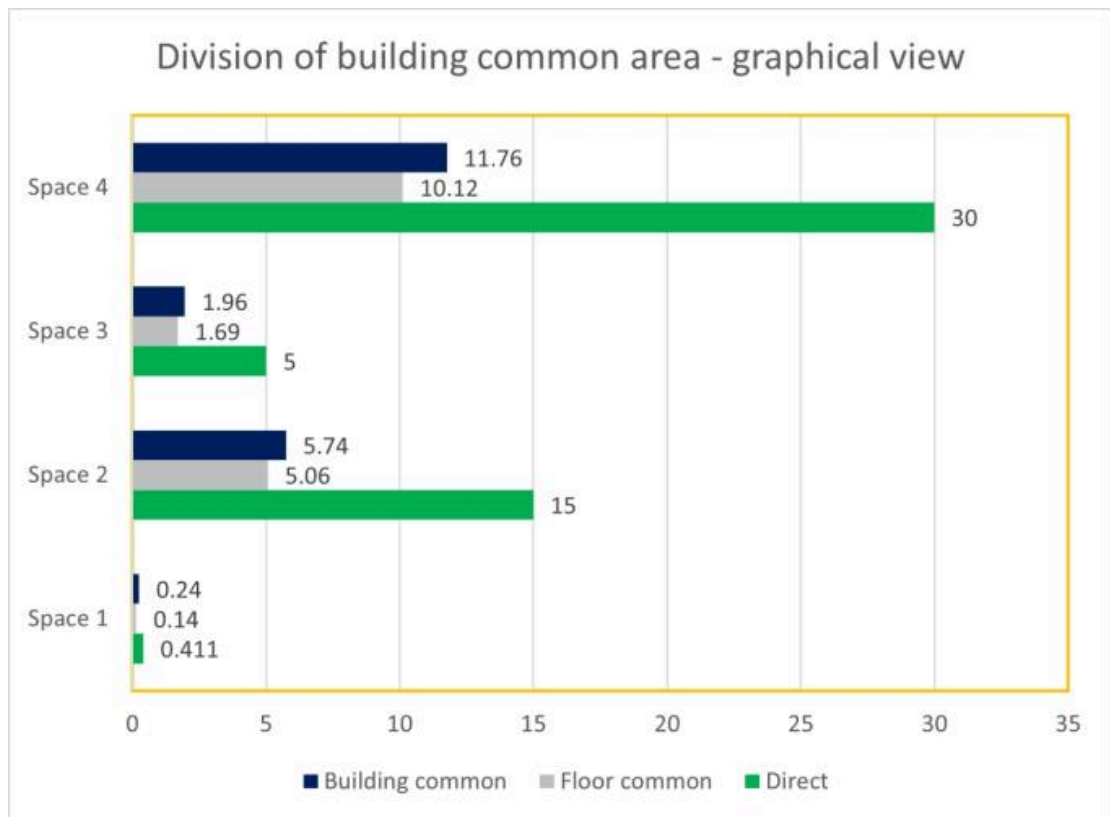
Differences in space dimensions report

With the **Differences in space dimensions** report you can quickly and easily detect deviations between the specified net floor surface area of spaces and that of the corresponding space usages on the set reference date. The results from the report enable you to rectify any significant discrepancies.

You can access the **Differences in space dimensions** system report by descending to **Spaces** and then clicking **Report** on the action panel.

Report settings for Differences in space dimensions report

In the **Report settings - Differences Space dimensions** window, which is accessed by clicking **Edit report settings** in the **Reporting** window, you can make following settings:

Title

The field **Title** allows you to specify your own title for the report. If you leave this field empty, the default Planon-defined title "Differences in space dimensions" is used. If you specify your own title, this title will be used instead of the Planon-defined title.

Subtitle

The field **Subtitle** allows you to specify a subtitle for the report.

Period from / Period to

These fields allow you to specify the period you want to generate and check data for by entering a start date (**Period from** field) and end date (**Period to** field). The start date applies as a check date in the report. Another check date is the last date (before or on the end date specified in the **Period to** field) a change was made to either the space usage or space dimensions.

Page break per property

If you wish to start each property on a new page, set the **Page break per property** option to **Yes**.

Show floors

If you wish to display floors in your report, set the **Show floors** option to **Yes**. Spaces are then grouped by their floor.

Totals per property / Totals per floor/ Grand total

With the Totals settings you can indicate the totals you want included in the report (per property, floor and/or grand totals). These totals are only meaningful if the start date and end date are the same.

Filter on minimal difference

Set this option to **Yes** if spaces which have differences greater than the number of square meter/feet specified in the **Minimal difference** field should be displayed in your report.

Minimal difference

This field becomes available if the **Filter on minimal difference** option is set to **Yes**. The **Minimal difference** field enables you to specify the minimal difference between space

size and space usage for which the difference should be reported. For example, if you enter the value 10, then the difference between space size and space usage should be ≥ 10 or ≤ #10

Sample "Differences in space dimensions" report

The **Difference** column displays the difference in net area between the space (dimension) and its space usage(s) on the check date:

Stacking and blocking report

A **Stacking and blocking** report displays space usage over several floors in a building. In Spaces & Workspaces , you can access the **Stacking and blocking** system report by going to Spaces > Spaces and by clicking **Report** on the action panel. In the **Reporting** dialog box, if you select the **System reports** tab, you can select **Stacking and blocking**. The report can be edited, previewed, printed and saved using the action panel options.

In order to preview a report, select **Stacking and blocking** and click **Preview report** on the action panel.
In the report, the floors of a property are displayed as horizontal bars. The mapping of the space usage on each floor is distinguished by various colors and the net area of the space usage is also displayed on the color itself. You can observe the black gradient color for the ground level of a property. The right side scale specifies the total net area of all the spaces of a floor. You can view the total net space usage area of a space mapping in the legend. You can also view the contribution (in %) of the mapping to the total net space usage.

Click **Edit report settings** on the action panel to edit the report. A dialog box is displayed in which you can modify the following report settings.

Report settings:

* **Title**: Specify a title for the report.

* **Subtitle**
: Specify a subtitle for the report.

* **Flexible settings - total**: This field displays the total number of flexible report settings that apply.

* **Report for user-defined stacking & blocking**
: Specify the data report that contains the user-defined space mapping.

* **Automatic coloring**
: If you set this field to **Yes**, default colors are automatically used in the report.

* **Show […]**: For all space mapping options mentioned below, you can create individual reports, by setting each respective **Show […]** field to **Yes**.
In order to view a property's space mapping, you can generate stacking and blocking reports for **Space categories**, **Departments**, **Department level 1**, **Department level 2**, **Department level 3**, Department level 4, **Space types**, **Cost centers**, **Tariff groups** (**Spaces**), **Space standards**, **Free attributes**, **Space occupancy**, **Free workspaces** or a user-defined report for **User-defined space mapping**.

  Color for unspecified space mapping criteria
  : Specify a color to map spaces that are not defined.

* **Color for unoccupied spaces**
: Specify a color to display empty spaces. These are spaces whose space usage is less than its space dimension. The difference between the total net area of the space dimensions and space usages are also displayed. The empty space is highlighted with the specified color.

After specifying the report settings, click **OK**.
In order to print the report, click **Preview & print** on the action panel. In the dialog box specify the requirements and click **OK**.

Click **Save as** on the action panel to save the report.

In the dialog box, in **Output**, specify a location to save your report.

In **Save as type**, specify a type to save the report.

Click **OK**. A dialog box appears stating that the export is successful.

If you open the saved PDF file of the report, you can view individual reports for all previously specified space mapping options:

- Generated Stacking and blocking reports on Occupancy, Free workspaces and User-defined space fields take *space dimensions* into account, instead of space
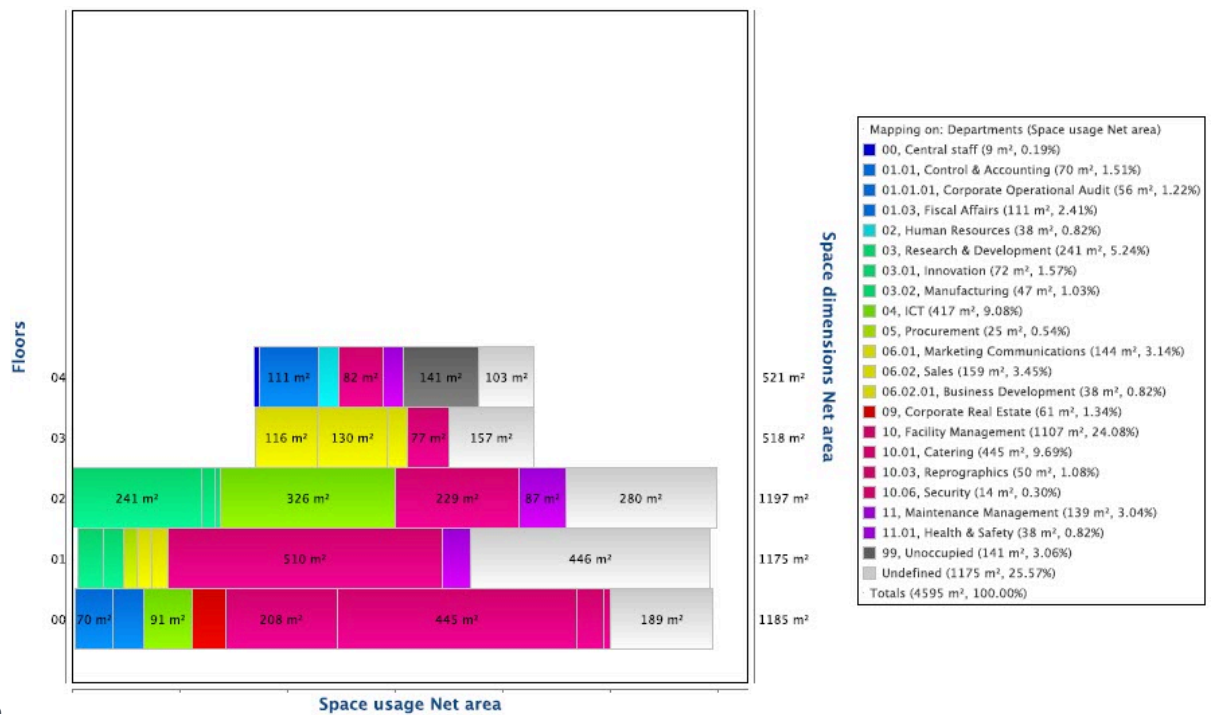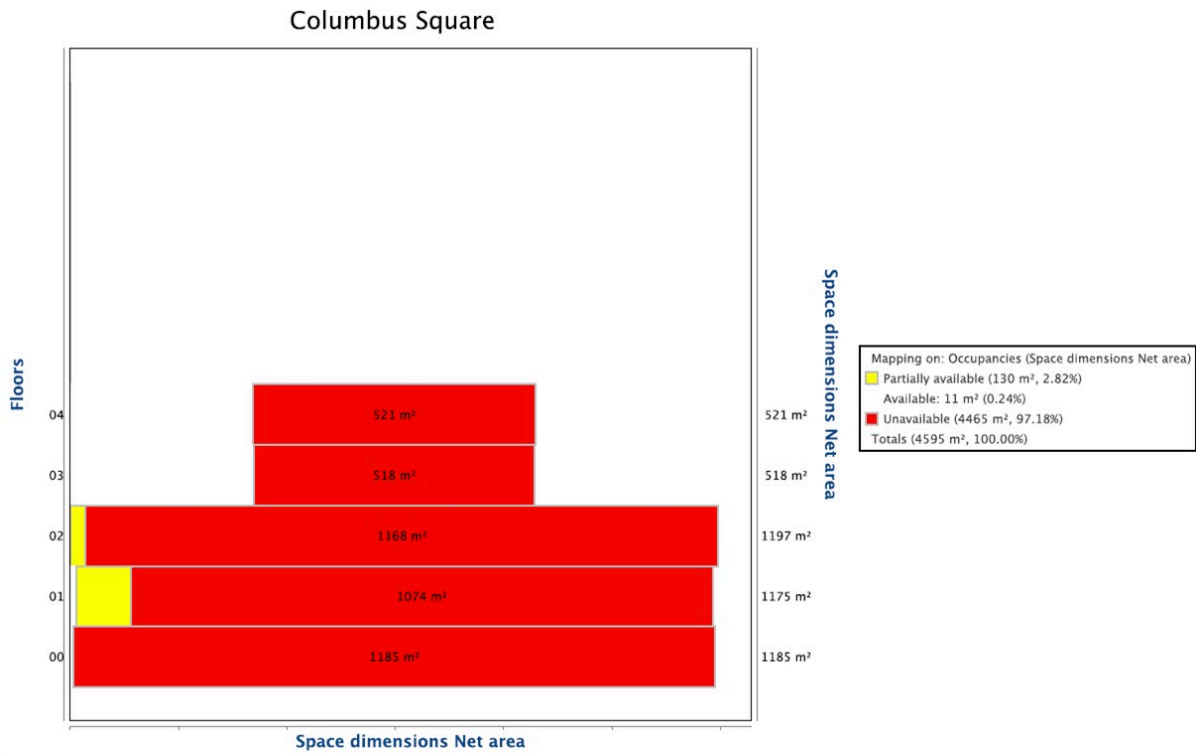

usage.

- The **Workspaces** chart compares the number of workspaces (as defined in the space usage) with the number of persons present in a space. You can view the total number and the available number of workspaces in the report. The following report specifies the available/occupied number of workspaces. **Green** – indicates that all workspaces are available.

  Orange – indicates that no workspaces are available.

  Red – indicates that workspaces are over-populated.

  Yellow – indicates that some workspaces in the space are still available.

  You can view the details in the legend.

Columbus Square
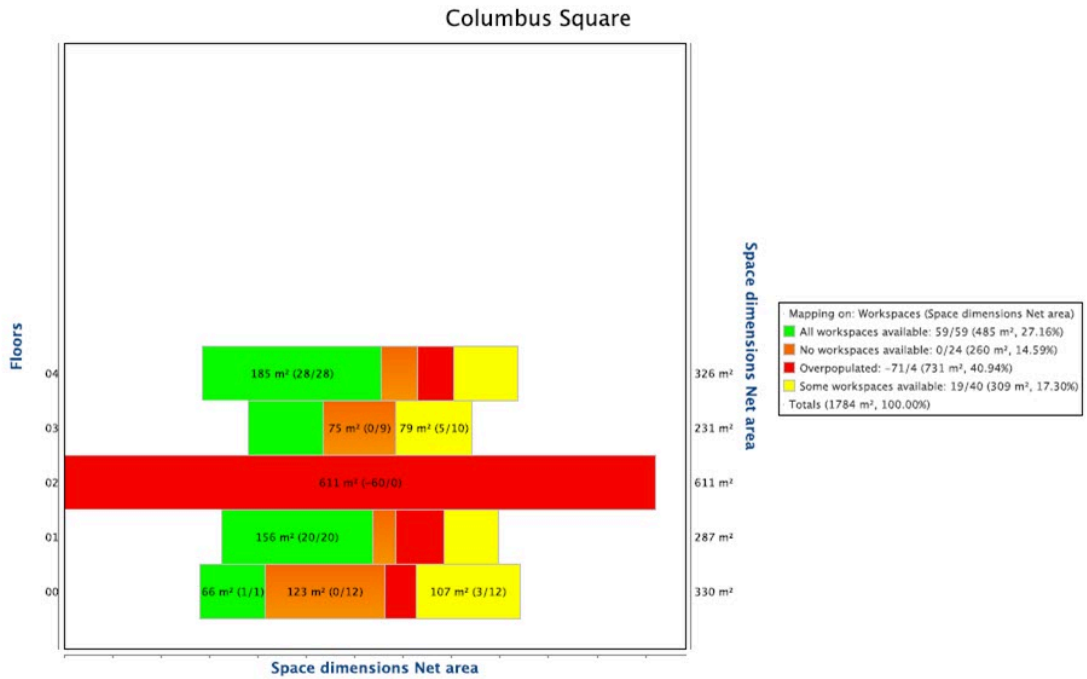
- The **Space occupancy** chart shows how much net space area is available: the empty or (partially) occupied spaces. **Green** – indicates unoccupied space area.
Yellow – indicates partially occupied space area
. **Red** – indicates that spaces are fully occupied, as is the case for most spaces in the following example:

Columbus Square

Space usage analysis report

You can access the **Space usage analysis** report by going to **Space details** and then clicking **Report** on the action panel.

This report enables you to analyze data that is directly linked to space usage. The report compares data on space usage (such as the number of workspaces and space usage dimensions) with the number of people. With the **Space usage analysis** report, you can analyze the following data about the selected spaces on the set reference date:

- The difference between available workspaces and occupied workspaces;

- The difference between the required functional area (in square meters/feet) and the available area (in square meters/feet) in space usage;

- The occupancy rate of the available workspaces in space usage;

- The occupancy rate of the rentable area in space usage.

Warning

- The calculations concerning the number of people per space and the functional area are based on data that is linked to people in Personnel . The calculation concerning workspaces and occupancy rate is based on the number of workspaces that is registered for space usage at Space details > Space usage.

- Since people are linked to spaces, it is impossible to determine which space usage belongs to which person if there is multiple space usage on the reference date. A question mark (?) will be printed in cells where data based on the number of people is expected.

Report settings for Space usage analysis report

In the **Report settings - Space usage analysis** window, which is accessed by clicking the **Edit report settings** option in the **Reporting** window, you can make settings in the following fields:

Group by

The **Group by** field enables you to specify the grouping of items in the report. You can choose to group the data in the report by department, floor, rent contract, cost center, property contract, space category, space type, tariff group or zone. Only one option can be selected.

Sort by

The **Sort by** field enables you to select the sorting of the items in the report. You can choose to sort the columns in the report according to department, floor, rent contract, cost center, property contract, space category, space type, tariff group or zone. Only one option can be selected.

Detailing

The **Detailing** field enables you to specify the detailing of items in the report. You can select which type of detailing you want in the report. You can choose between the following options:

- **Hide space details**. Enabling this option means that information on individual spaces is left out;

- **Property totals only**. Enabling this option means that only totals per property are shown;

- **Whole report**. Enabling this option means that all details are shown in the report.

Page breaks per property
Enabling this option means that a new page will be created for each property. By default, this option is disabled.
Filter options for the Space usage analysis report
If you click the dialog box icon in the **Filter** field, the **Select filter criteria** window will open. The fields in this window enable you to activate one or multiple filters, to filter out spaces according to specific criteria:

- **Available space**: enables you to filter out the available rentable area per space usage;

- **Available workspaces**: enables you to filter out space usage with a specified number of free workspaces;

- **Occupied space**: enables you to filter out the occupancy rate of rentable area per space usage;

- **Occupied workspace**: enables you to filter out specified workspace occupancy per space usage.

The **Space usage analysis** report includes various columns. For more information on the function of these columns, refer to the table in Space analysis report.

Space analysis report

Space standards report

The **Space standard report** provides data to analyze the space usage of a property, floor, department and so on, with respect to space standards.

In Spaces & Workspaces , you can access the **Space standards** report by going to **Space details** > **Space Usage** and then by clicking **Report** on the action panel.

In the **Reporting** dialog box, you can save the **Space standards** report by clicking **Save as**.

In the **Save as** dialog box, specify an output location and save the report as the Excel/ CSV/HTML/PDF and click **OK**.

Warning	Irrespective of the computer's language settings, the data is always exported treating the dot as a decimal separator. Therefore, an issue may arise if the client computer uses the dot as a digit grouping symbol. In this case, if the report is saved in MS Excel, the data will be interpreted correctly, but if the data is saved in any of the other formats, the client system will interpret the data incorrectly. For example, if the value 1234.567 is exported from Planon ProCenter to a computer which uses a dot as a digit grouping separator, the value is interpreted as 1234567.

Workspace analysis report

The **Workspace analysis** report allows you to retrieve and analyze key data on available workspaces. This information cannot be retrieved in another way, by filtering for example, because calculated fields are involved. The report quickly shows you in which space you can find an available workspace. You can access the **Workspace analysis** report by going to Spaces details > Fixed workspacesand clicking **Report** on the action panel. You can select the **Workspace analysis** report on the **System reports** tab.

> In the Layouts TSI, your Planon administrator can configure the layout of the **Report settings - Workspace analysis** dialog box. Depending on your configuration any of the below settings may be available to you.

Report settings for Workspace analysis report

A number of settings is available for the **Workspace analysis** report.

Title

The field **Title** allows you to specify your own title for the report. If you leave this field empty, the default Planon-defined title "Workspace analysis report" is used.

Subtitle

The field **Subtitle** allows you to specify a subtitle for the report.

Columns

Set the following fields to **Yes** if you want to include them as columns in your report:

Display available area: the total number of available square meters (feet) of the workspace.

Display unoccupied area: the remaining (unoccupied) area of the workspace.

Display number of people: the total number of occupancies (irrespective of their occupancy %) of the workspace.

Display occupancy: the occupancy percentage of the workspace.

Display required area: the functional area of the workspace.

Display workspace details: the detailed information on workspaces such as code and description.

Display available workspaces: the total number of available workspaces

Display occupied workspaces: the total number of occupied workspaces

Display workspace count: the total headcount of the workspaces

Display department: the code of the corresponding department

Sorting

In the **Sorting** field you can select a method of sorting, if required. By default, **No sorting** is selected. You can choose to sort on: **Available surface area**, **Required surface area**, **Unoccupied surface area**, **Occupancy %** or **Personnel**.

> ℹ️ You can only choose a sorting method if the options **Totals per space**, **Totals per floor** and **Totals per property** are set to **No** and the option **Display workspace details** is set to **Yes**.

Totals per property / Totals per floor/ Totals per space /Grand total

With the various **Totals** settings you can indicate the totals you want included in the report (per property, floor, space and/or grand totals).

If either **Totals per space**, **Totals per floor** or **Totals per property** is selected, then the following ascending sorting is applied sequentially:

- Property
- Floor
- Space

Otherwise, the sorting as selected in the report settings is applied.

Filter

Choose a filter from the **Filter** field. By default, **No filtering** is selected. You can choose to filter on: **Available surface area**, **Required surface area**, **Unoccupied surface area**, **Occupancy %** or **Personnel**.

If you have selected a filter, you also have to specify the required operator in the **Operator** field and a filter value in the **Filter value** field.

> ℹ️ If you have selected a filter, the totals and grand totals are calculated based on the selection after the filtering. This value can therefore differ from the value prior to filtering.

Examples

Below are some examples of the report, with various report settings.

No filtering, totals per property:

Properties code	Floors code	Spaces code	description	Workspaces code	description	Available m²	Required m²	Unoccupied m²	Occupancy %	People #	Workspace Available	Workspace occupied	Workspace Count
Not Specified													
EU-E	1	EU-E-001	Office 1.1	WP1.1.1	Room 1 - Workspace1	20.000	18.000	2.000	50.00	1	0	1	1
EU-E	1	EU-E-001	Office 1.1	WP1.1.2	Room 1 - Workspace 2	8.000	7.000	1.000	50.00	1	0	1	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.1	Room 2 -Workspace 1	20.000	12.000	8.000	80.00	1	0	1	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.2	Room 2 -Workspace 2	40.000	20.000	20.000	100.00	2	0	1	1
EU-E						88.000	57.000	31.000		5	0	4	4
EU-S	1	EU-S-001	Office 3.1	WP3.1.1	Room 1- Workspace1	14.000	14.000	0.000	50.00	1	0	1	1
EU-S						14.000	14.000	0.000		1	0	1	1
EU-W	1	EU-W-001	Office 2.1	WP2.1.1	Room1-Workspace 1	12.000	0.000	12.000	0.00	0	1	0	1
EU-W						12.000	0.000	12.000		0	1	0	1
Not Specified						114.000	71.000	43.000		6	1	5	6
Total						114.000	71.000	43.000		6	1	5	6

Filter on available area greater than 14 m², totals per property

Workspace analysis — Available area bigger than 14 m2 — EU-E Europa Building East / Multiple spaces

Properties code	Floors code	Spaces code	description	Workspaces code	description	Available m²	Required m²	Unoccupied m²	Occupancy %	People #	Workspace Available	Workspace occupied	Workspace Count
Not Specified													
EU-E	1	EU-E-001	Office 1.1	WP1.1.1	Room 1 - Workspace1	20.000	18.000	2.000	50.00	1	0	1	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.1	Room 2 -Workspace 1	20.000	12.000	8.000	80.00	1	0	1	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.2	Room 2 -Workspace 2	40.000	20.000	20.000	100.00	2	0	1	1
EU-E						80.000	50.000	30.000		4	0	3	3
Not Specified						80.000	50.000	30.000		4	0	3	3
Total						80.000	50.000	30.000		4	0	3	3

No filtering, sorting on unoccupied surface area (descending)

Workspace analysis — Unoccupied surface area, descending — Multiple properties / Multiple spaces

Properties code	Floors code	Spaces code	description	Workspaces code	description	Available m²	Required m²	Unoccupied m²	Occupancy %	People #	Workspace Available	Workspace occupied	Workspace Count
Not Specified													
EU-S	1	EU-S-001	Office 3.1	WP3.1.1	Room 1- Workspace1	14.000	14.000	0.000	50.00	1	0	1	1
EU-E	1	EU-E-001	Office 1.1	WP1.1.2	Room 1 - Workspace 2	8.000	7.000	1.000	50.00	1	0	1	1
EU-E	1	EU-E-001	Office 1.1	WP1.1.1	Room 1 - Workspace1	20.000	18.000	2.000	50.00	1	0	1	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.1	Room 2 -Workspace 1	20.000	12.000	8.000	80.00	1	0	1	1
EU-W	1	EU-W-001	Office 2.1	WP2.1.1	Room1-Workspace 1	12.000	0.000	12.000	0.00	0	1	0	1
EU-E	1	EU-E-002	Office 1.2	WP1.2.2	Room 2 -Workspace 2	40.000	20.000	20.000	100.00	2	0	1	1
Not Specified						114.000	71.000	43.000		6	1	5	6
Total						114.000	71.000	43.000		6	1	5	6

Workspace availability

This report shows whether the maximum occupancy of the fixed workspace has been exceeded or not. Go to Space Details > Fixed workspaces and then click **Report** on the action panel. A dialog box pops-up. On the **System reports** tab, select the **Workspace Availability** report. By clicking **Edit report settings** you can change the following fields:

Report start date and Report end date:

Specify the period for which you want to generate the output.

> **Note**For a report covering one day, the start date and end date must be the same.

Availability % > = and Availability % <:

Specify a filter to show whether the workspace is overpopulated or underpopulated during the selected period.

- If **Availability % <** is set to **0 (<0)**, the report will show the period during which the workspace is overpopulated.

- If **Availability % > =** is set to **0 (> =0)**, the report will show the period during which there are workspaces available.

Title:

Enter a title for the report. If you leave this field empty, the default Planon-defined title "Workspace Availability" is used.

> **Note**Be aware that the content of the 'one day' version of the report differs a bit from the 'period' version.

Workspace department information

This system report provides information about the departments 'owning' or occupying the spaces.

1. Go to **Space Details** > **Fixed workspaces** or **Free fixed workspaces** and click **Report** on the action panel.

2. On the **System reports** tab, select the **Workspace department information** report.

3. Click **Edit report settings**, to change the default values in the following fields:

Report date
Specify the start date for which you want to generate the output. By default, the reference date is set.

Only show differences > (Yes / No)
If you choose **Yes**, the report shows the workspaces that are occupied for more than 50% for one department, whereas they are owned by another department.
If you choose **No**, the report shows all workspaces and their corresponding owning department, occupying department and occupancy %.

Note   ≤50% is not shown as a difference, only >50%.

Title
Enter a title for the report. If you leave this field empty, the default Planon title "Workspace department information" is used.

Note   At least one person with a specified occupancy rate must be assigned to the workspace in order to show the workspace in the report.

Click **Preview report**, to view the report output.

Spaces & Workspaces - Field Descriptions

Components - selection steps

Selection step	Description
Cost centers	With this selection step you can filter spaces by cost center. Cost centers are units like departments which are used in cost accounting and to which costs can be charged.
Departments	With this selection step you can filter spaces by department.
Floors	In this selection step you can view or enter a property's floors. Each newly added space must be linked to a floor.
Free attributes 1	You can customize the **Free attributes 1** selection step, to allow for filtering and space mapping according to your own criteria. Example: the health and safety aspects of a building / space. You can also assign a color number to indicate the color in which the filtered spaces should be displayed when space mapping in a CAD Integrator drawing. Finally, you can specify a risk level for a space, by selecting a risk level from a pick list. Your organization can define its own codes for the various risk levels.
Free attributes 2	Additional selection step that allows for customization, similar to **Free attributes 1**.
Space categories	In this selection step you can group spaces on the basis of the required cleaning work program - for example office and sanitary spaces.
Space standards	In this selection step you can select spaces according to a hierarchical system of space standards. You can edit the main space standard and make changes to the hierarchy as required.
Space types	In this selection step you can view or enter spaces with a specific type of space usage – for example offices, warehouses or conference rooms. Space type data is used in the charging of space-related costs.

Selection step	Description
Tariff groups	In this selection step you can select spaces that are linked to the selected tariff group. Tariff groups are used to charge on space costs. For each tariff group you can specify an amount per square meter/feet, a start date and a period (in days).
Zones	In this selection step you can group spaces into zones. Zones are property-related. Grouping spaces by using zones is based on space characteristics. Example: zones that indicate which spaces in the building are accessible to certain people and which spaces are not.

Floor fields

Field	Description
Floor sequence	This field is used for sorting the floors. During upgrade, Planon ProCenter will populate this field with the floor code value when it is an integer value. After upgrade, you should check if there are still floors that do not have a value. Fill in the empty field with a value.

> **i**
> - System reports that sort or group on floor use the **Floor sequence** value.
> - For user reports, to get the same sorting behavior, add the **Floor sequence** field to the report, which will enable sorting on this field.

Field	Description
Floor	This field displays the name and code of the associated floor.
Property	This field displays the property to which the floor belongs.
CAD drawing	Displays the location where the relevant AutoCAD drawings (*.dwg files) of a floor are stored.
Inbox CAD drawing	Displays the path of the AutoCAD drawing related to the floor mapping from the CAD import input folder.
Constructional drawing	Displays the path of the constructional CAD Integrator drawing with .orj extension.
FM drawing	Displays the path of an FM CAD Integrator drawing with .orj extension.

Field	Description
Fluxline correction area	Displays surface area of the windowsill (measured up to the glass) added to the net surface area, with the aim of calculating the total rentable area of a space. The fluxline correction can be specified at floor or space level. The fluxline correction for the entire floor can be proportionally divided over the individual spaces on that particular floor.
Gross area	In this field you can specify the gross floor area for the entire floor (the surface area of the floor measured along the outside walls or the wall node of adjacent spaces). The gross floor area can be proportionally divided over the individual spaces of the floor by registering a gross floor area per space.

Floor attributes fields

Field	Description
Active	Select **No** if the selected floor is no longer available. By default **Yes** is selected, which means that the floor is available.
CAD background image	Select the image to be displayed as a background in the CAD Integrator drawing. You can select (drag & drop / browse for) an image from your local drive. After uploading the image, you can still rotate or remove the background image. All image formats are supported.

> **i** The selected background image is displayed for the selected floor across all CAD Integrator related TSIs, in the Planon Live app and in Kiosk.

Field	Description
CAD drawing	In this field, you can create a link to the location where the relevant AutoCAD drawings (*.dwg files) of a floor are stored.
CAD drawing inbox	Displays the path of the AutoCAD drawing related to the floor mapping from the CAD import input folder. Click the image icon in the field to view the floor drawing. However, the drawing is not displayed if the **Delete input files (Y/N)** field in CAD Import is set to **Yes**.
Constructional drawing	Here you can link a constructional CAD Integrator drawing with .orj extension to the floor.
End date	When you add new floor attributes, an end date for the previous floor attributes is automatically entered in this field.
Floor	This field displays the associated floor's name and code.

Field	Description
Floor hatch scale	Enter a value to modify the hatching pattern displayed in CAD Integrator. The minimum value is 0. There is no maximum value. The larger the number, the greater the distance between the hatch lines.
Fluxline correction	The surface area of the windowsill (measured up to the glass) added to the net surface area, with the aim of calculating the total rentable area of a space. The fluxline correction can be specified at floor or space level. The fluxline correction for the entire floor can be proportionally divided over the individual spaces on that particular floor.
FM drawing	Here you can link an FM CAD Integrator drawing with .orj extension to the floor.
Gross area	In this field you can specify the gross floor area for the entire floor (the surface area of the floor measured along the outside walls or the wall node of adjacent spaces). The gross floor area can be proportionally divided over the individual spaces of the floor by registering a gross floor area per space.
Legend font size	Use this field to set the font size of the legend used in a CAD Integrator drawing.
Level of detail	The **Level of detail** field on floor attributes is taken into account during the CAD import, to filter out smaller details / items from the drawing's display and thus improve CAD Integrator performance. As the drawing display becomes leaner it is loaded and handled faster. **Level of detail** is always in the drawing's unit of measurement. For example, if you fill in 0.5 and the drawing is in meters, all objects smaller than 0.5 meters will not be shown in the drawing. If all objects (for example chairs) are based on single lines, the objects will lack some lines. In general, Planon recommends to use polylines instead of single lines. ⓘ During an initial import there usually are no floors yet. In that case, a **Level of detail** of 0.0 is applied, which means that all drawing details are included.
Position CAD background image	This field saves the position of a background image after you have configured it. This field is not required on regular layouts, but can be useful in DTAP scenarios, to transfer the background image position correctly.
Property	This field displays the property to which the floor attributes belong.

Field	Description
Rotation angle	In this field, the orientation angle of a floor plan is saved by default.
Font size: Space Person Visitor Asset Fixed workspace Flexible workspace	CAD Integrator drawings can display information on spaces, personnel, visitors, assets, fixed workspaces and flexible workspaces. Use the: **Space font size** field to set the font size of text describing spaces. **Person font size** field to set the font size of text describing people. **Visitor font size** field to set the font size of text describing visitors. **Asset font size** field to set the font size of text describing assets. **Fixed workspace font size** field to set the font size of text describing fixed workspaces. **Flexible workspace font size** field to set the font size of text describing flexible workspaces.
Start date	When you add new floor attributes, a start date is automatically entered in this field. By default this start date is the reference date.
Title font size	Use this field to set the font size of the title used in a CAD Integrator drawing.
Unit of length	Select the unit of measurement that you want to apply to the drawing. It is important that you complete this field if you want to use CAD Integrator to load space sizes from a CAD drawing into the Planon database.

History fields (spaces, space usage, space dimensions)

Field	Description
History added manually?	Indicates if the history was added manually via the **Add** button.

Field	Description
Modification date-time	The date-time at which the change was entered in Planon ProCenter .
New value	The contents of the field after the modification.
Old value	The contents of the field prior to the modification.
Planon user	The name of the Planon user who made the change.
Space / Space usage / Space dimension	The space/space usage/space dimension to which the change applies.
Start date	The date at which the change becomes effective.
System field name	The field name of the changed field as it is defined in the system.
User field name	The field name of the changed field as it is known to the user.

Occupancy fields

Field	Description
Cost center	Typically, the cost center is inherited from the space usage, provided there is only one space usage. If there is multiple space usage, you must select the cost center to which the costs of the workspace are going to be charged.
Department	The department is inherited from the space usage, provided there is only one space usage. If there is multiple space usage, you must select the department to which the costs of the workspace are going to be charged.
Space	Displays the space to which an occupancy belongs. It is not possible to select a non-assignable space in this field because you cannot assign a person to a non-assignable space (type).
Occupancy rate	Enter the occupancy rate of the workspace. This is the percentage of the official work week that the workspace owner occupies the workspace. By default, the value is inherited from Personnel , but it can be modified.
Occupant	Enter the workspace occupant. The names in the pick list come from Personnel .

Field	Description
Position	This field is automatically populated with the position (job) of the workspace owner once the owner has been selected. This data also comes from Personnel .
Required area	This field is populated with the number of square meters/feet corresponding to the position (job) of the workspace owner (employee). The calculation is based on the value registered in the **Surface area standard** field from Components > Positions in Personnel .
Works on [day of week]	In these yes/no fields you can specify on which days of the week the workspace owner actually occupies the workspace. The fields have no functional influence on other fields, but you can use them as a basis for a filter selection.

Space fields

Field	Description
Additional area space usage	The number of square meters/feet used for filing cabinets and the like. The value in the field is read-only.
BIM GUID	The BIM GUID was used to identify spaces for BIM viewer.
	Following the activation of the improved feature Discontinue support for BIM GUID field, the functionality behind this field is deprecated and is replaced by BIM system BO links.
Bookable	This field is automatically set to **Yes**, if the reservation unit is linked to a space. By default the value is set to **No**. This field indicates if a space is bookable or not.
Core area space usage	Read-only field, specifying the space usage core area. This is the surface area taken up by walls, fixed columns, and small recesses for example. The formula for the calculation is: gross area – net area = core area. The value is automatically calculated by Planon.
Floor	This field is used to specify the floor on which a space is located.
Floor area space usage	Read-only field, specifying the surface size that corresponds with the space usage.

Field	Description
	The field may also specify an alternative surface area for space usage, for example the actual floor surface area that needs to be cleaned or for which floor covering is required. The surface area may vary from the net area used to calculate the rentable area.
Fluxline correction space usage	Read-only field displaying the fluxline correction of a space usage.
Functional area	Read-only calculated field, specifying the total functional area for all people linked to the space. The calculation is based on the data in the **Position** and **Occupancy rate** fields in Personnel .
Gross area space usage	Read-only field, specifying the surface area of the space usage measured along the outside walls or the wall node of adjacent spaces.
Height space usage	This read-only field specifies the space height in meters/feet, which is derived from the space dimensions that are valid on the reference date.
Name	This field is used to record the space's name.
Net area space usage	Read-only field displaying the total net area of all space usage.
Headcount	This is a calculated field, displaying the number of people who are linked to the space via the **Space** field in Personnel .
Space occupancy	This is a calculated field, which shows the actual number of occupants of the space on the reference date.
Perimeter space usage	Read-only field displaying the space usage circumference, which is derived from the space usage dimensions that are valid on the reference date.
Property	This field displays the property to which the space belongs.
Remaining area	In this calculated field the number of unused square meters/feet is displayed. The calculation is as follows: the net area

Field	Description
	of the space (net space dimensions) minus the required area is the remaining area.
Quality level	If you use the Objective-based maintenance solution, you can select a relevant quality level for the selected space, in this field.
	ℹ️ The complete Objective-based maintenance solution is scheduled to be released mid-2023.
Rentable area space usage	Read-only field displaying the rentable area of a space usage.
Required area	In this read-only field, Planon automatically specifies the number of square meters/feet corresponding to the position (job) of the workspace owner(s) (employee(s)). The field value is calculated by adding up the functional area and the additional area.
Space capacity	Read-only field, specifying the number of workspaces available in the selected space based on the data from Space details > Space usage.
Space number	This field is used to record a space number (code). The number may consist of a maximum of 15 characters.
Space usage quantity	A read-only field that displays the total number of space usages for the selected space.
Volume (space usage)	This is a read-only calculation field. The formula for the calculation is: net area * height = volume.
Zone	This field is used to select the property-related zone in which a space is located. The zone can be chosen from a list.
	The choices available correspond with the zones at Components > Zones.

Standards tab

The fields available on the **Standards** tab can be used to value (weigh) certain aspects of a space. The aspects that can be awarded a rating are: lighting, light

Field	Description
	occurrence, security, climate, and space finish. This data can be modified.

Service providers solution

Field	Description
Weighting factor	Enter the weighting factor (decimal) that must be used in malus calculations for the selected space, in case of under-performance. The minimum value you can set is 0.01.

Space type fields

Field	Description

General

Field	Description
Code	Enter a space code.
Name	Enter the name of the space.
Charge back	Select a charge back method from the list in this field. The type you select here is used in the **Charge back space usage** system report. See: Charge back space usage report.
Space category	Select a space category to which a space belongs.
Assignable	Specify if spaces of the selected space type can be occupied by personnel or not. Spaces of an *assignable* space type can be allocated to people. For example: staircases and public areas are generally not assignable, while offices and meeting rooms are. By default the field is set to **Yes**. If you change the setting to **No**, the space is no longer assignable and the **Free workspaces** field is cleared.

> ℹ You cannot change the **Space type** to 'non-assignable' (**Assignable** = **No**) if there are still people assigned to one or more related spaces.

For more information about **Free workspaces**, see Space data - selection steps.

Color and hatching

Field	Description
CAD Integrator color number	Select a CAD Integrator color number from the list in this field.
CAD Integrator hatching	Select a CAD Integrator hatching value in this field.
CAD hatching preview	This field displays the preview of CAD hatching if the **CAD Integrator hatching** field is filled in.

Space analysis report columns

Group header	Column name	Information displayed in the column
Space	Code	The code of the space.
	Name	The name of the space.
	Rentable	Displays the rentable area of the space (net area + fluxline correction).
Space usage	Workspace	Sum of the number of workspaces that are registered for the relevant space usages at the **Space details** selection level > **Space usage** selection step.
	Person	Number of people linked to the space via the **Space** field in the Personnel TSI, with their occupancy rates discounted.
	Functional	The total area required for all people linked to the space (Surface area standard from Personnel taking into account the occupancy rates).
	Additional	The total additional area (taken up by filing cabinets etc.) needed for all relevant space usages.
	Required	The sum of the functional and additional areas calculated for the relevant space usages.
	Rentable	The sum of the rentable area calculated for the relevant space usages.

Group header	Column name	Information displayed in the column
Space usage analysis	Free workspaces	The number of free workspaces calculated for the relevant space usages.
	Difference	The difference in rentable area between the relevant spaces and space usages.
	Available	The available number of square meters/feet for the relevant space usage, calculated by deducting the required area from the rentable area. If no space usages have been created, this column displays the rentable area of the relevant space.
Occupied	Workspace	The occupancy rate of the relevant workspace (based on the number of people and the number of workspaces linked to the space usage).
	Space	The occupancy rate of the relevant space (based on the required area and the rentable area linked to the space usages).

Space data - selection steps

Selection step	Description
Facilities	The facilities in a space can be registered as space details in the **Facilities** selection step. Facilities include technical provisions such as wall sockets, telephone plugs, and network sockets.
Finishings	Fixed finishings in a space can be registered as space details in the **Finishings** selection step. Finishings may for example include the type of floor covering, the ceiling type and the type of doors.
Flexible workspaces	Flexible workspaces are added and maintained in both Spaces & Workspaces (at **Workspaces & space data** > **Flexible workspaces**) and in **Reservations**. You can reserve a flexible workspace in **Reservations**. For more information, see the Reservations section of the Planon ProCenter documentation.
Free workspaces	You can register data relating to *available* fixed workspaces here. You can view and maintain the

Selection step	Description
	occupancy and the workspace details in the **Occupancies** selection step. It shows the user all the workspaces that are at least 1% available on the reference date.
Space dimensions	The dimensions of individual spaces are added in the **Space dimensions** selection step. Space dimensions are the dimensions of the physical space itself. These dimensions should not be confused with the dimensions added in the **Space usage** selection step.
Space history	Space history displays the history of the selected space. It provides information about the space name, property and the floor to which it belongs. It also allows you to add a comment to the selected space unit.
Space usage	You can add space usage data to a space. The data can be entered in this selection step, such as the dimensions, the department using the space, and the tariff per unit area. Additionally, a start and end date can be specified for each space usage.
	As multiple (simultaneous) space usage can be added to a single space, you can view which department used the space at a particular time, what are the dimensions of the current space usage and what they were in the past, and the corresponding tariff. You can also add future scenarios.
	For details on how to set a reference date in order to view a past or future space usage, see Reference date.
Workspaces	Workspaces are areas in a space that are occupied at fixed times by the same employees to do their work. You can register their start and end dates, costs information, occupancy data and more.

Space dimensions fields

Field	Description
Additional area	The number of square meters/feet used for filing cabinets and the like. The value in the field must be manually entered.
Ceiling load	Specify the maximum ceiling load. It is a mandatory information in case there is a need to attach/hang heavy items such as cranes or pulleys to the ceiling.
Core area	This field is populated with a value that is automatically calculated. The core area is surface area taken up by walls,

Field	Description
	fixed columns, small recesses and so on. The formula for the calculation is: gross area – net area = core area.
End date	This field is populated with the end date for the space dimensions if you end the space at **Spaces**.
Floor area	Free field for specifying the floor area that corresponds with the space. The floor area may be an alternative surface area for a space, for example the actual floor surface area that needs to be cleaned. This can differ from the net area used to calculate the rentable area.
Floor load	Specify the maximum permissible floor load. It is a mandatory information for large operating facilities such as laboratories or operating rooms to ensure that this load is not exceeded in case of construction or heavy machinery.
Fluxline correction	Enter the fluxline correction: the surface area of the windowsill (measured up to the glass) added to the net surface area, with the aim of calculating the total rentable area of a space.
Gross area	Enter the surface area of the space measured along the outside walls or the wall node of adjacent spaces.
Gross internal area	This field is calculated from Net area and Core area. Gross internal area = net area + core area.
Height	Enter the space height.
Net area	Enter the net area of a space. The value in this field can also be loaded from a CAD drawing by using CAD Integrator . Net area = Gross internal area - core area.
Perimeter	Enter the space's circumference. The value in this field can also be loaded from a CAD drawing by using CAD Integrator .
Rentable area	The default value in this field is automatically calculated as the sum of net area and flux line correction. If no specific flux line correction is provided, the **Net area** value is applied. You can manually edit the field, but if the specified value does not match the sum of net area and flux line correction, it becomes a non-calculated field and it will no longer update after changes to the value of the net area or flux line correction. You can always make the field 'calculated' again by updating the values, thus returning to the situation where the value is equal to the sum of the net area and flux line correction.
Start date	Select a start date for the space dimensions. This field is mandatory.
Volume	Displays the volume of the space. This is a calculated field. The formula for the calculation is:

Field	Description
	net area * height = volume.

Space usage fields

Field	Description
Additional area	Enter the number of square meters/feet used up by filing cabinets and the like.
Code	Enter a code for the space usage, for example consisting of the space code and a '_' + a serial number.
Core area	This field value is automatically calculated by Planon. The core area is the surface area taken up by walls, fixed columns, and small recesses for example. The formula for the calculation is: gross area – net area = core area.
End date	Enter the end date of the selected space usage.
Floor area	Enter the surface area that corresponds with the space usage. This field can also be used to register an alternative surface area for space usage, for example the actual floor surface area that needs to be cleaned. This may vary from the net area used to calculate the rentable area.
Fluxline correction	Enter the fluxline correction: surface area of the windowsill (measured up to the glass) added to the net surface area, with the aim of calculating the total rentable area of a space usage.
Gross area	Enter the surface area of the space usage as measured along the outer walls or the wall node of adjacent spaces.
Height	Enter the height of the space usage in meters/feet.
Name	Enter an appropriate space usage name in this field.
Net area	Enter the net area of a space usage. The value can also be loaded from a CAD drawing, using CAD Integrator . If the net area is loaded from a drawing, only one space usage is allowed on the current reference date.
Perimeter	Enter the space usage circumference. The value in the field can also be loaded from a CAD drawing by using CAD Integrator . If the net area is loaded from a drawing, only one space usage is allowed on the current reference date.
Rentable area	The default value in this field is automatically calculated as the sum of net area and flux line correction. If no specific

Field	Description
	flux line correction is provided, the **Net area** value is applied. You can manually edit the field, but if the specified value does not match the sum of net area and flux line correction, it becomes a non-calculated field and it will no longer update after changes to the value of the net area or flux line correction. You can always make the field 'calculated' again by updating the values, thus returning to the situation where the value is equal to the sum of the net area and flux line correction.
Rentable unit	Specify a rentable unit for the space usage.
Space capacity	In this field, you can enter the number of workspaces for the selected space usage. This number is not connected to the number of workspaces linked to the space at Space details > Workspaces.
Start date	Enter the start date of the space usage in this field. The start date of space usage cannot be earlier than the start date of the space itself.
Space type	Select the space type to which a space belongs.

> ℹ️ You cannot change the **Space type** to 'non-assignable' (**Assignable** = **No**) if there are still people assigned to one or more related spaces.

Field	Description
Tariff group	Select a relevant tariff group for the space usage from the pick list in this field.
Neighborhood	Select the neighborhood to which the space belongs. This reference field is editable.
Volume	This calculated field displays the volume of the space usage. The formula for the calculation is: net area * height = volume.

> ℹ️ The space usage dimensions from the **Miscellaneous** tab are linked to single or multiple space usage that is linked to the physical space. As far as multiple simultaneous space usage is concerned, the sum of the dimensions of all space usage should preferably be the same as the net space dimensions. This ensures that space usage is displayed correctly in space mappings.

> ⚠️ If you select the **Deactivate reference date** toolbar button, some read-only data fields of the selected space usage, for example the Property and Floor fields, will be cleared. This is due to the fact that these fields refer to an element that is also reference-date-dependent. Consequently, if the reference date is deactivated, the corresponding field data

Field	Description
	cannot be retrieved from the system. As soon as you activate the reference date, these fields will display data again.

Service providers solution

Field	Description
Weighting factor	Enter the weighting factor (decimal) that must be used in malus calculations for the selected space, in case of under-performance. The minimum value you can set is 0.01.

Workspace fields

Field	Description
Asset	In this field, select the asset linked to the workspace. The workspace can be made visible in CAD Integrator via this item.
Code	Enter a workspace code.
Cost center	Based on the reference date, the relevant cost center is shown (from the workspace details that are active on the reference date).
Department	Based on the reference date, the relevant department is shown (from the workspace details that are active on the reference date). The department of the workspace can be regarded as the workspace owner (who is not necessarily the occupier). The department(s) that occupy the workspace are entered at **Occupancies**.
End date	Select an end date for the workspace in this field.
Functional area	The required area based on the data from the **Occupancies** selection level is specified here. If two people are simultaneously linked to a workspace, the area required for the person needing the most space will be specified here. By default, this field is not visible.
Name	Enter the name of the workspace.
Occupancy rate	The occupancy rate is derived from the **Occupancies** selection level. It is the sum of all occupancy rates (the total occupancy) on the selected reference date, also if the reference date is deactivated. By default, this field is not visible.

Field	Description
Reservable	This field is automatically set to **Yes** if you make the fixed workspace reservable via the **Make workspace reservable** action on the action panel, or if you select it in the **Workspace** field on the layout of a flexible workspace. If you make the fixed workspace reservable via the action panel, a newly created, flexible workspace can be booked. For more information, see Flexible workspace fields.
Flexible workspace	This field automatically displays the name and code of the linked flexible workspace, either one that is created when made *reservable* via the action panel, or one that is linked manually to a fixed workspace.
Start date	Select a start date for the workspace. This field is mandatory.
Surface area (AvailableArea)	Enter the surface area of the workspace here. ℹ After the **Update area workspace** feature switch is enabled, this field will no longer be populated by CAD Import.
Surface area (WorkspaceDetailsArea)	The relevant surface area which is active on the reference date is shown. This surface area value is based on the **Workspace details** that are valid on the selected reference date.
Tariff group	Based on the reference date, the relevant tariff group is shown (from the workspace details that are active on the reference date).
Workspace type	Based on the reference date the relevant workspace type is displayed (from the workspace details that are active on the reference date).

Workspace details fields

Field	Description
Cost center	Select a cost center for the workspace.
Department	Select the department to which the workspace belongs.
End date	This field is updated if a new move to the workspace is selected on a Person move line.
Max. occupancy %	Enter the maximum allowed occupancy percentage of the workspace. If the **Workspace capacity** field is filled, the value in this field is automatically calculated. The formula for the calculation is: *Workspace capacity*100*.

Field	Description
	ℹ It is possible to overpopulate, or underpopulate workspaces.
Neighborhood	Select the neighborhood to which the workspace belongs. This reference field is editable.
Space	Displays the space where the workspace is located.
Start date	Displays the start date of the selected workspace.
Surface area	Enter the area value for the workspace. This value can also be populated by CAD Import.
Tariff group	Select a tariff group for the workspace.
Workspace	Displays the selected workspace.
Workspace capacity	Displays the **Max. occupancy %** value as a whole number (not as a percentage). If the **Max. occupancy %** is filled this field is populated with a value that is automatically calculated. The formula for the calculation is: *Max. occupancy %/100*.
Workspace type	Select a workspace type from the list. This information is derived from the Workspace types created in Supporting data .
	ℹ For more information refer to Supporting data .

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Symbols