



Strategic Workspace Planning

Planon Software Suite

Version: L105

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About this Document

Intended Audience

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

Contacting us

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

Document Conventions

Bold

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

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols



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

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About Strategic Workspace Planning

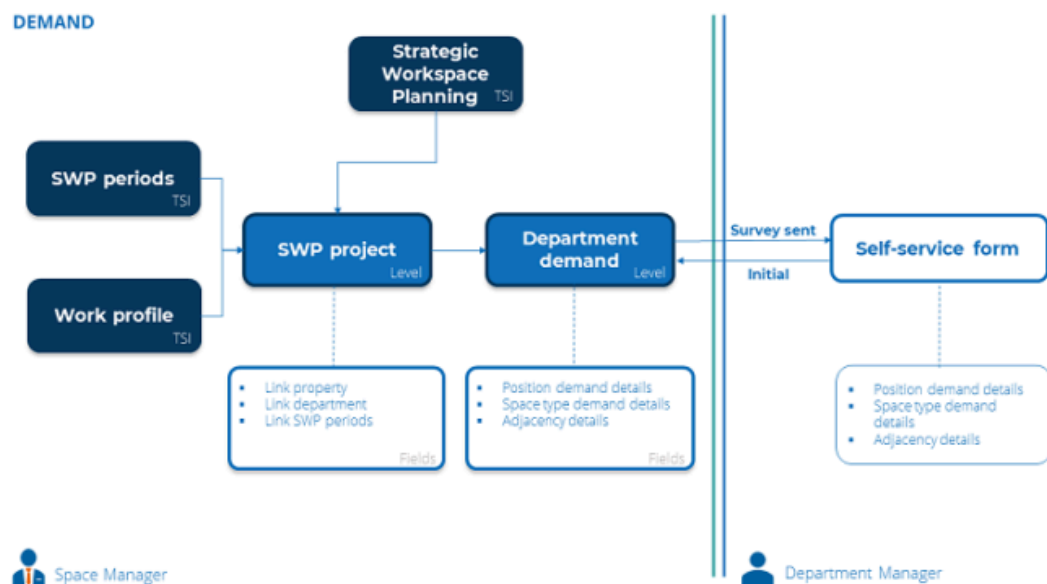
Planning an organization's real estate portfolio is one of the most challenging tasks that facilities and real estate professionals are facing. Expansions, the introduction of a flexible workforce or workforce reductions are just a few of the situations you may have to deal with. Strategic Workspace Planning will help manage these challenges.

By entering estimates such as headcount, FTE (Full-Time Equivalent) and space requirements in Planon ProCenter, Strategic Workspace Planning enables you to get an overview of future space and occupancy requirements. This will help Space managers to better align workspace demand.

With Strategic Workspace Planning :

- The Space manager can create a demand for the department and send a survey to the Department manager.
- The Department manager can adjust the requirements for his/her department (using a Self-Service form sent via a survey).
- Space manager / Department manager can create roles in Planon ProCenter with the required work profiles.
- Space manager / Department manager can check the requirement of a department demand.

Demand overview



Concepts

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

SWP periods

An **SWP period** represents the time period planned for the department demand for workspaces. The Space manager can create SWP periods. The Department manager can specify the requirements of their department for every SWP period linked to the department demand.

[Adding SWP periods](#)

Work profile

A **Work profile** is a separate area required for a **position**. For example: Working from home, Meetings, Quiet working etc.,

A person can have one or more positions and a position can have one or more work profiles.

[Adding work profiles](#)

Adjacency

The adjacency specifies the required nearness (adjacency) between departments.

Both the Space manager and the Department manager can add / modify their adjacency details for the department.

[Adding department adjacency details](#)

SWP project

A **SWP project** contains all relevant demand data. Every project can have its own email and survey template so that it can be styled according to the wishes of the region / project.

[Adding SWP projects](#)

Department demand

The department demand specifies the demand per department for headcount, FTE and required area.

[Automatically generating department demand](#)

[Manually adding department demand](#)

Working with Strategic Workspace Planning

This section describes the various functions available.

Adding SWP periods

You can create SWP periods in the **SWP periods** TSI. These created SWP periods can be linked to the project.

Procedure

1. Go to SWP periods.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the field descriptions, see [SWP period fields](#).

4. Click Save.

You have now added a SWP period.

SWP periods

Adding work profiles

You can create work profiles in the **Work profiles** TSI. You can link a work profile to the person position.

Procedure

1. Go to Work profiles.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the field descriptions, see [SWP work profile fields](#).

4. Click Save.

You have now added a work profile.

Adding SWP projects

In **Strategic Workplace Planning** you can create projects and link properties, departments and SWP periods to it.

Procedure

1. In Strategic Workplace Planning, go to the Scenario projects selection level.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the field descriptions, see [SWP project fields](#).

4. Click Save.

You have now added a project.

Linking properties to a project

Procedure

1. In Strategic Workspace Planning , go to the **Scenario projects** selection level.
2. Select the project for which you want to link a property.
3. On the action panel, click Link properties.

Strategic workspace planning

The screenshot shows the 'Strategic workspace planning' application. The main window displays details for 'Project01', including its description, manager, status, and dates. A right-hand panel titled 'Scenario projects' contains a list of actions, with 'Link properties' highlighted in green. The 'General' section of the project details includes a table for SWP Period Details and a table for Property details.

| Code | Description | Period be... | Period end date |
|------|-------------|--------------|-----------------|
| 001 | Period01 | 6/1/2022 | 6/30/2022 |

| U... | Property code | Name |
|------|---------------|-----------------|
| 14 | | Columbus Square |

| Code group | Department |
|------------|------------|
| 01 | Finance |

The Link properties dialog box appears.

4. Select the property you want to link.
5. Click OK.

You have now linked a property to your project.

Linking department(s) to a project

The procedure for linking departments to a project is similar to that of linking a property.

Procedure

1. In Strategic Workplace Planning, go to the Scenario projects selection level.
2. Select the project for which you want to link one or more department(s).
3. On the action panel, click Link departments.

This screenshot is similar to the previous one, but the 'Link departments' option in the right-hand panel is highlighted in green. The 'General' section of the project details is also visible, showing the same project information and tables as in the previous image.

The Link departments dialog box appears.

i The departments displayed here are the departments that are available in the property linked to the project.

4. Select the department(s) you want to link to the project.

i You cannot link a department record that is an ancestor of another linked department record.

5. Click OK.

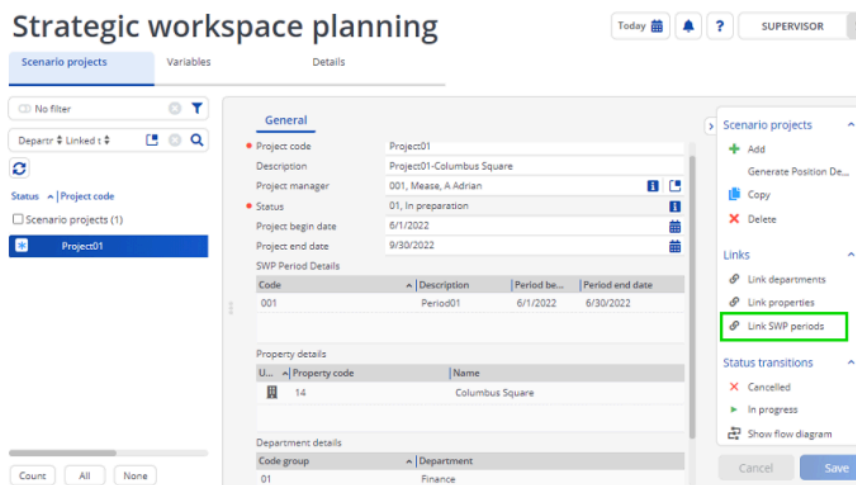
You have now linked a department to your project.

Linking SWP periods to a project

The procedure for linking periods to a project is similar to that of linking a property/department.

Procedure

1. In Strategic Workplace Planning, go to the **Scenario projects** selection level.
2. Select the project for which you want to link SWP periods.
3. On the action panel, click Link SWP periods.



The Link SWP periods dialog box appears.

i The SWP periods displayed here are the periods that are linked to the project.

4. Select the SWP period(s) you want to link.

i You cannot link more than 8 SWP periods.

5. Click OK.

You have now linked a period.

Automatically generating department demand

By using **Generate Position Demand** action you can automatically generate department demand.

Procedure

1. In Strategic Workplace Planning, go to the **Scenario projects** selection level.
2. Select the project for which you want to create a department demand.
3. On the action panel, click **Generate Position Demand**.
4. Department demand variables are created in the Variables selection level, with a combination of Property and Departments linked to the scenario project.

 When **Department demand** is generated by using the **Generate Position Demand** action, the current values of **Headcount** and **Full-time equivalent** for the department are automatically filled based on the position details.

If required, you can add space type and adjacency details to the created department demands. To add space type and adjacency details, see [Adding department space type demand details](#) and [Adding department adjacency details](#).

Department demand

Manually adding department demand


In **Strategic Workplace Planning** you can also add department demand to the scenario project manually. If department demand is added manually you need to add department position details and the current values of **Headcount** and **Full-time equivalent** manually.

Procedure

1. In Strategic Workplace Planning, go to the **Variables** selection level.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the field descriptions, see [SWP department demand fields](#).

4. Click Save.

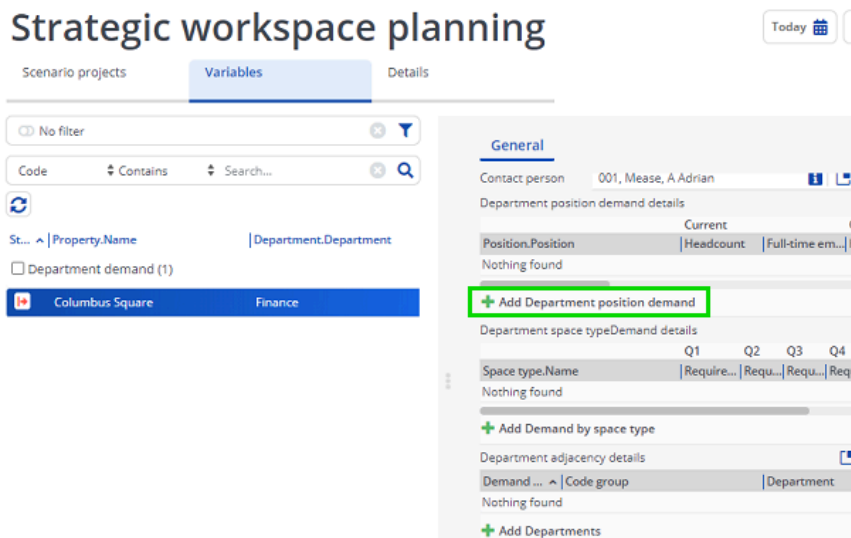
 You cannot create a department demand for the already created combination of scenario project, property and department.

Adding department position demand details

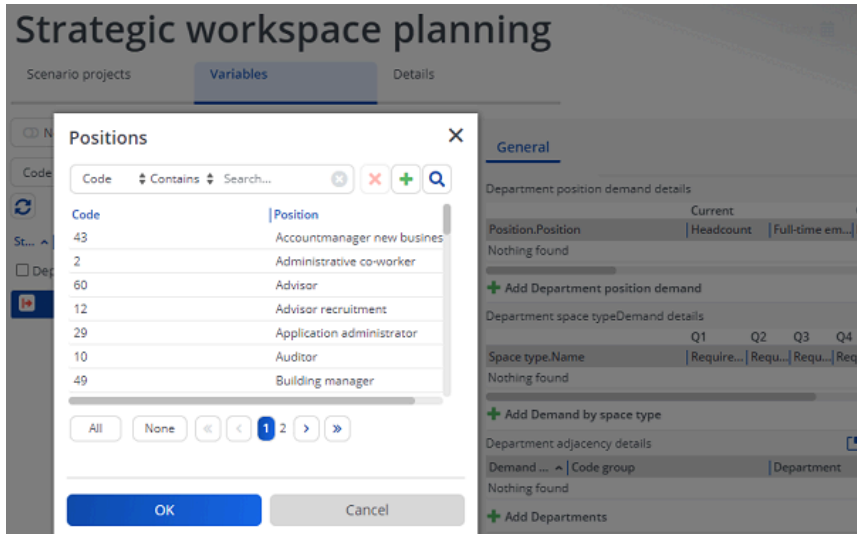
When a department demand is created manually, you need to add department position details.

Procedure

1. In Strategic Workplace Planning, go to the **Variables** selection level.
2. Select the department demand for which you want to add department position details.
3. On the data panel, click **Add Department position demand**.



The Positions dialog box appears.



4. Select the positions you want to add.
5. Click OK.

After adding the department position you can fill the current headcount and full-time equivalent fields. The department manager can edit these fields when a survey is sent to him/her.

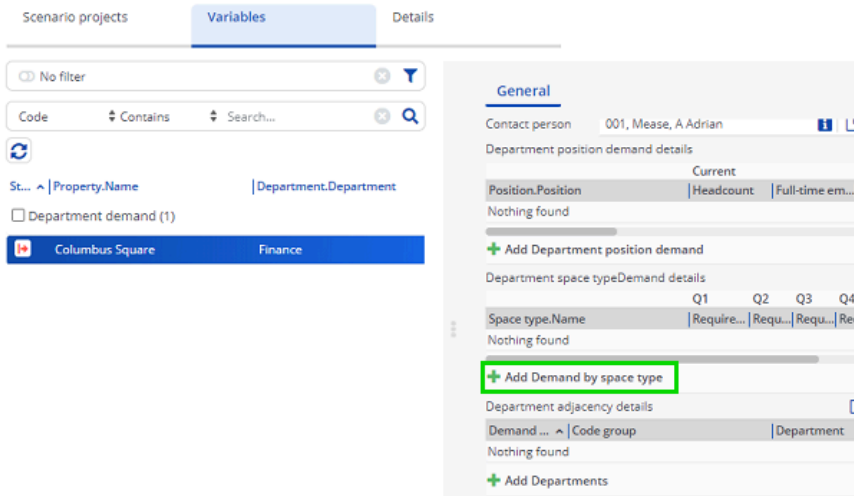
Adding department space type demand details

When a department demand is created manually, you need to add the space type demand if required.

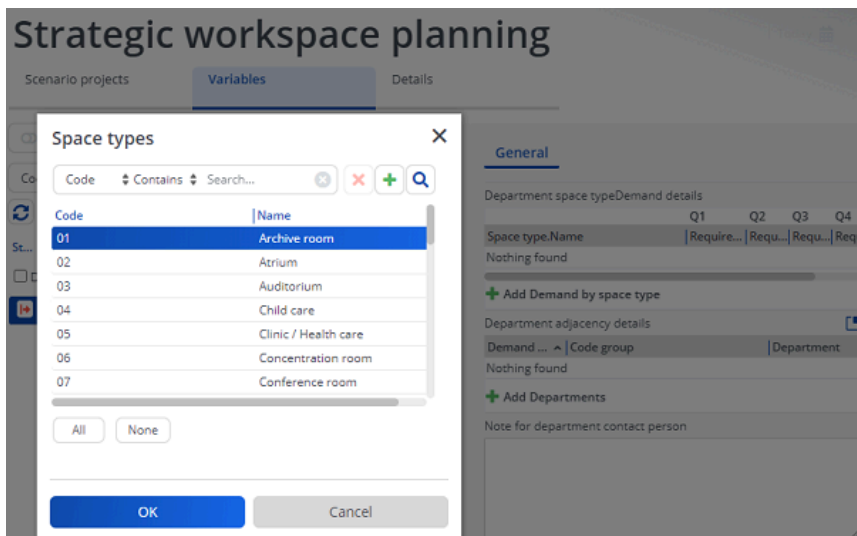
Procedure

1. In Strategic Workplace Planning, go to the **Variables** selection level.
2. Select the department demand for which you want to add space type details.
3. On the data panel, click **Add Demand by space type**.

Strategic workspace planning



The Space types dialog box appears.



4. Select the **spaces** you want to add.
5. Click OK.

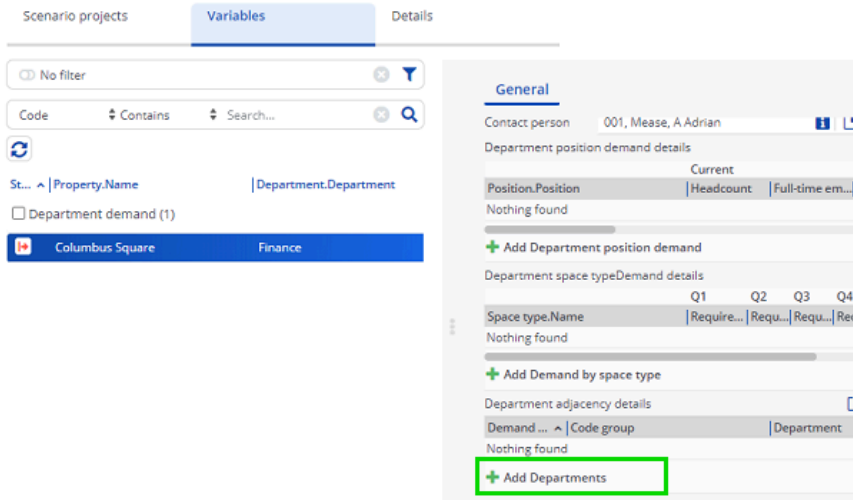
You have now added the department space type demand.

Adding department adjacency details

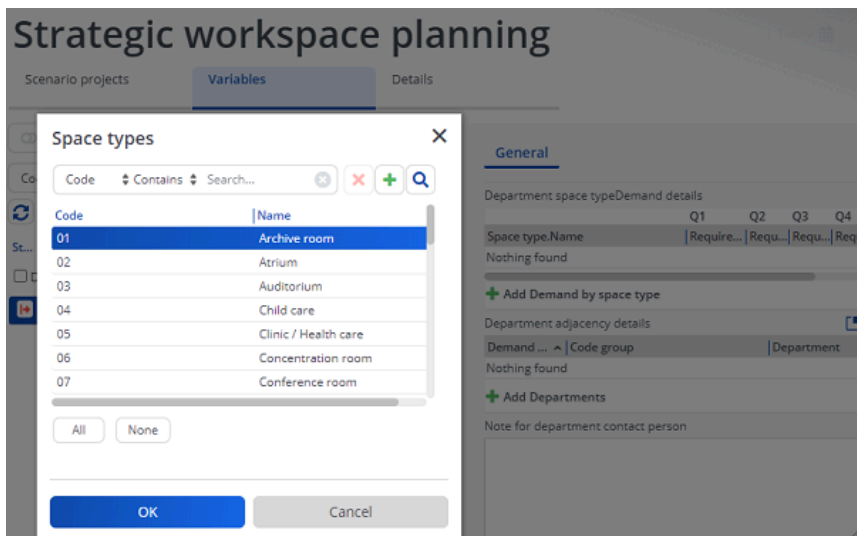
Procedure

1. In Strategic Workplace Planning, go to the **Variables** selection level.
2. Select the department demand for which you want to add adjacency details.
3. On the data panel, click **Add Departments**.

Strategic workspace planning



The Space types dialog box appears.



4. Select the **Department(s)** you want to add.
5. Click OK.

You have added department(s).

Adjacency

Strategic Workspace Planning - Field descriptions

SWP period fields

| Field | Description |
|-------------------|---|
| Code | Enter a code for the SWP period. |
| Description | Enter a description for the SWP period. |
| Period start date | Select the start date of the period. |
| Period end date | Select the end date of the period. |

SWP work profile fields


| Field | Description |
|------------------|---|
| Code | Enter a code for the work profile. |
| Description | Enter a description for the work profile. |
| Remote work? | Select Yes if the work profile has permission to work remotely. By default, this field is set to No . |
| Remote work type | Select the type of remote work from the list. |
| Area required | Enter the value of the required area in m2. |

SWP project fields

| Field | Description |
|-----------------|---|
| Project code | Enter a code for the SWP project. |
| Description | Enter a description for the SWP project. |
| Project manager | Select a responsible project manager from the list. |

| Field | Description |
|--------------------|--|
| Status | This read-only field displays the project's status (In preparation , In progress or Completed). |
| Project start date | Select the planned start date of the project. |
| Project end date | Select the planned end date of the project. |

SWP department demand fields

| Field | Description |
|--|--|
| Scenario project | Select the scenario project from the list. |
| Code | Enter a code for the department demand. |
| Status | Displays the status of the department demand. |
| Property | Select a property from the list. |
| Preferred property? | By default, the value is set to Yes , the value in the Property field is empty if this field is set to No . |
| Department | Select a department from the list. |
| Contact person | Select a contact person for the department from the list. |
| <div style="border: 1px solid black; padding: 5px;"> <p> If a contact person is specified for the department in the Department business object, then this field is populated automatically.</p> </div> | |
| Department position demand details | Fill the position demand details by entering Headcount and Full-time equivalent count for the linked periods. |
| Department space type demand details | Fill the area of space type required for the linked periods. |
| Department adjacency details | Specifies the required adjacency details between the departments. |
| Note for department contact person | Enter any additional information for the department contact person, if required. |
| Comment | Enter a comment, if required. |

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