



# Surveys

## 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](mailto: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 Surveys

A survey is an expert inspection of a property's condition. Its purpose is to identify any problems with an asset and its building elements. The survey is conducted by a surveyor who visits the property and prepares a report outlining any problems. By using the **Surveys** TSI in Planon ProCenter , surveyors can prepare building survey projects and process the data gathered during building surveys. The TSI interacts closely with the maintenance features available in the **Assets** , **Asset library** and **Planned Maintenance** , **Activity planner** TSIs.

In the **Surveys** TSI you can create two types of surveys:

- **Condition surveys:** based on [Survey elements](#) and defects which are processed into the Assets Pro TSI. For more information, see [Condition Surveys](#).
- **Assessment surveys:** based on [Survey objects](#) and [Observations](#) which are processed into the Assessments and observations TSI. For more information, see [Assessment surveys](#).



# Generic Survey topics

This section describes the generic topics used for **condition surveys** and **assessment surveys**.

## Surveys – Concepts

This section describes the concepts available in **Surveys** TSI and how they interact with each other.

## Assets

Assets are items of value owned by an organization. They can be registered in Planon ProCenter in **Assets Pro** TSI.

The **Assets Pro** TSI allows you to add and maintain data on company assets and to keep track of their locations and owners. This asset register can be updated by processed surveys from the **Surveys** TSI.

## Standard asset

A standard asset is a kind of 'template' asset that end users can use to speed up the process of adding a new asset.

Planon administrators can add, copy, delete, modify or archive standard assets in Supporting data > **Asset library**. Standard assets can be linked to a survey element in Condition Surveys > Survey elements.

## Multiple asset

A *multiple asset* is a set of identical assets that is registered in Planon ProCenter as if it is one entity. The individual assets of a multiple asset can have different locations assigned to them.

It is possible to survey multiple(non-singular) assets. The only condition is that they must be located in the same property / building.

## Asset group

A functional and hierarchical grouping of assets that requires maintenance.

In Planon ProCenter, an asset group is one of the three types of item groups an asset can simultaneously belong to. The other two types are purchase item group and catalog item group. The individual items in an asset group have their own descriptions and

codes. In **Condition Surveys**, asset groups are used to filter out assets and building elements whose condition is to be surveyed.

## Asset classification

A functional and hierarchical grouping of assets that require planned preventative maintenance. The individual items in an asset classification have their own descriptions and codes. An asset classification can include categories such as: Roofs, Ceilings, Walls, Lighting, and Security etc.

In **Condition Surveys**, asset classifications are used to filter out assets and building elements whose condition is to be surveyed.

## Alternative classification

An optional, configurable, functional grouping of assets, which is used as one of the criteria to cluster survey elements.

In **Condition Surveys**, alternative classifications are used to filter assets and building elements whose condition is to be surveyed.

## Building element

An essential component of a building that protects the building's occupants. Its condition affects the indoor environment. Building elements include a building's roof, floor slabs, walls, windows and doors.

In Planon ProCenter, building elements are added and maintained in the Assets TSI .

## Property

A building or building complex.

In Planon ProCenter properties are hierarchical elements, which means that subproperties can be added to them. The number of hierarchical levels is three. Authorized users can add properties and subproperties at the first selection level of various TSIs. In **Surveys**, properties are linked to a survey project in order to filter out the assets or building elements that are to be surveyed in the **Surveys** TSI.

## Survey project

A plan added in **Surveys** TSI, which includes various surveys of properties (buildings), building elements and assets.

In Planon ProCenter , survey projects are added and maintained in Surveys > Survey projects.

## Survey project status

The extent to which a survey project is carried out.

In **Surveys** TSI, you can assign the following statuses to a survey project:

- In preparation
- In progress
- Completed

These statuses are selected at the Survey projects > Status transitions action panel.

## Survey

A part of a survey project, aimed at inspecting the condition of assets or building elements in a specific property. If required, a different surveyor can be assigned to each survey in a survey project.

In Planon ProCenter , surveys are added and maintained in **Surveys** TSI.

## Survey status


The extent to which a survey has been carried out.

In **Surveys** TSI, you can assign various statuses to a survey:

- In preparation
- In progress – checked out
- In progress – in Planon
- Ready for tuning
- Ready for processing
- Processed. This final status cannot be selected. It is assigned automatically after the **Process survey data** action is completed.

These statuses are selected at the **Surveys** selection level > **Status transitions** action menu. The **In progress – checked out** status is assigned to a survey whose survey data is exported to an external surveying tool. To use the action **Process survey data** a survey must be set to the status **Ready for processing**.

 To make a status transition to **Ready for processing** the **Observed condition before maintenance** field at **Survey elements** must be populated.

 If a survey is in the **Ready for processing**, **Processed**, or **In progress – checked out** status, the data of the survey is read-only in Planon ProCenter.

## Resurvey

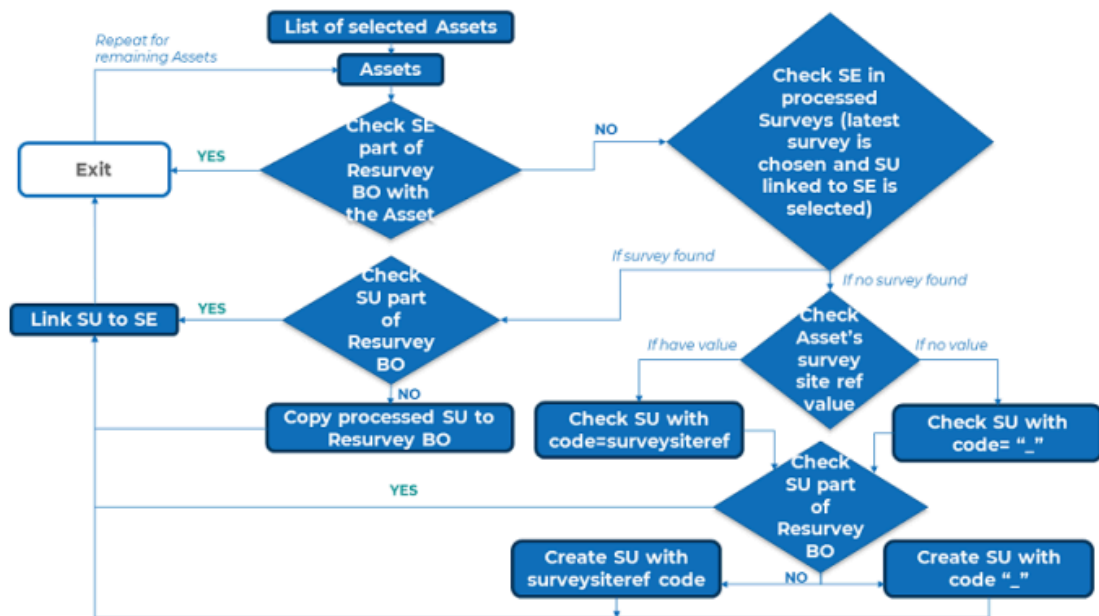
A part of a survey, aimed at adding a set of survey elements to the survey unit based on existing assets and / or building elements of the property. By this preparation time and survey time for the surveyor is reduced. For re-survey, assets and / or building elements

of the property need to be linked to survey. For linking assets to survey for re-survey, see [Linking assets to survey for resurvey](#).

Survey elements are added to survey units using re-survey by following the below rules step-by-step:

- **Rule 1:** If survey unit exist, then survey unit is linked to the new survey element. If no survey unit exist then survey unit from the latest survey is taken and the new survey unit is linked to the new survey element.
- **Rule 2:** When rule 1 fails, check for **SurveySiteRef** value of an asset. If it has value create a new survey unit by using the code and description of **SurveySiteRef** field and linked to the new survey element.
- **Rule 3:** If **SurveySiteRef** has no value create a new survey unit with the code "-" and description as empty and linked to the new survey element.

**i** New Survey unit is created with the field **Survey** = Survey for re-survey.



## Survey unit

A part of a building, or building complex, which is included in the surveying information added to Planon ProCenter . Survey unit is a functional and logical breakdown of a property. **Example:** Building floors, Lifts etc.

In **Surveys TSI**, you can add survey units to surveys at **Survey units** level.

**i** You can add or view relevant communication logs regarding this item, such as documents and photos. For more information, see [Communication logs](#).

## Survey site

Survey site is a number of survey units, grouped by their physical location. You can use the **Survey sites** selection step to filter out survey units according to their location.

**Example:** Front wall, Second floor, Roof etc.

In Planon ProCenter , survey sites are added and maintained in the **Surveys** TSI.

## Working with Surveys

This section describes the processes and tasks that can be performed in the **Survey** TSI.

### Adding a survey project

You can manage your building surveys thematically by placing them in survey projects.

#### Procedure

1. Go to Survey projects.
2. On the action panel, click Add.
3. Complete the relevant fields in the data section. For more information about these fields, refer to Survey projects fields.
4. Click Save.

You can now add subprojects to the survey project. The maximum number of hierarchical levels is 2.

### Linking properties to a survey project

You can link the properties that must be surveyed to a survey project.

#### Procedure

1. In Condition Surveys, go to Survey projects.
2. Select a survey project.
3. On the Links action panel, click Link properties.

The **Link properties** dialog box opens. This dialog box only contains the properties that are linked to the associated survey project.

4. At Available, select the property or properties containing the assets that you want to link to the survey project.
5. Click the right arrow button to transfer the properties to In use.

**To unlink properties from the survey project: select the relevant properties in In use and click the left arrow button.**

6. Click OK.

The selected properties are now linked to the survey project. You can verify this by keeping the survey project selected and going to **Properties**.

## Adding a survey to a survey project

You can add surveys to a survey project. If required, each survey can be allocated to a different surveyor.

### Procedure

1. Go to Surveys.
2. On the action panel, click Add.
3. If you want to conduct an assessment survey, set the **IsAssessment survey?** field to **Yes**. If you want to conduct a condition survey, set the field to **No**.
4. On the data panel, complete the relevant fields. For more information, refer to Survey fields.
5. Click Save.

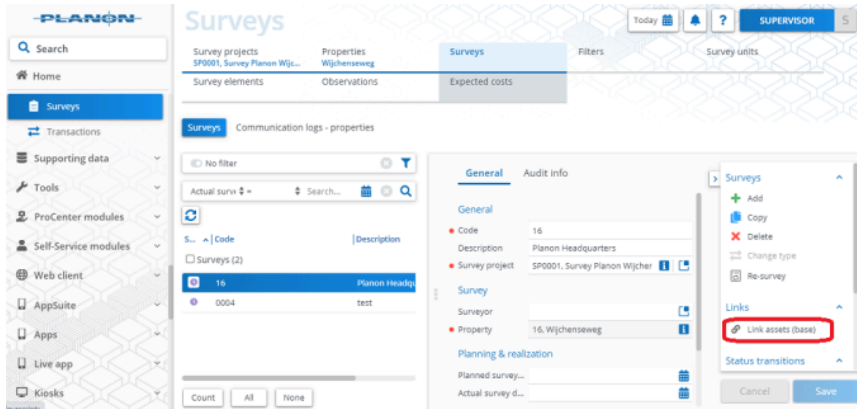
The survey is added to the selected survey project.

## Linking assets to survey for resurvey

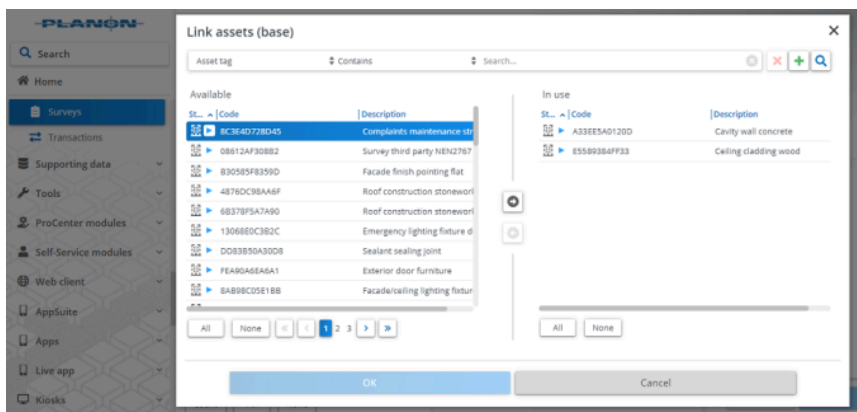
You can link the assets or building elements of the property to the survey for re-survey. For this you need to add Resurvey BOM in the action panel and Link assets (base) BOM in links panel of Survey tab in Survey TSI.

### Procedure

1. Go to Survey.
2. On the links panel, click Link assets (base).



3. A list of assets linked to the property appears.



**i** In **Condition surveys**, only the assets with a standard asset are displayed, whereas in **Assessment surveys**, all assets including those without a standard asset are displayed.

4. Select the assets that need to be linked to survey for resurvey.



**i** For information on resurvey, refer to [Resurvey](#)

5. Click OK.

## Surveys – Field Descriptions

### Survey projects fields


Field	Description
Code	Enter a code for the survey project.
Actual start date	Select the start date on which the survey project actually started from the date-picker in this field.

Field	Description
Actual end date	Select the end date on which the survey project actually ended from the date-picker in this field.
Description	Enter a relevant description for the survey project.
Planned start date	Select the planned start date of the survey project from the date-picker in this field.
Planned end date	Select the planned end date of the survey project from the date-picker in this field.
Parent level	When adding a subproject, select the main project from the dialog box that is available in this field.
Responsible manager	Select the manager who is responsible for the survey project from the dialog box available in this field.
Condition score calculation method	Select a method to calculate the condition score for the survey project from the dialog box available in this field.
	<div style="border: 1px solid black; padding: 5px;"> <p> Only used for <b>Condition surveys</b> and not for <b>Assessment surveys</b>.</p> <p> If you modify the method to calculate the condition score of the survey project, all the condition scores of survey elements from the survey projects are recalculated.</p> </div>
Maintenance library	This field is used by the Mobile Condition Assessor (MCA) app to filter the standard assets based on the selected maintenance library.

## Survey unit fields

Field	Description
Code	Enter a code for the survey unit.
Description	Enter a description for the survey unit.
Survey	Select the survey to which the survey unit belongs.
Property	Displays the property to which the survey unit belongs.



Field	Description
Survey result	This field displays the survey result that the surveyor can select from a user-defined picklist on the Mobile Condition Assessor (MCA) app.
Image	This field displays the image of the <b>Survey unit</b> that the surveyor can view / add using the Mobile Condition Assessor (MCA) app.
<div style="border: 1px solid black; padding: 5px;"> <p> The <b>Survey result</b> and <b>Image</b> fields store information in Planon ProCenter that was added by the surveyor via the MCA app.</p> </div>	
Survey site	Select the survey site to which the survey unit belongs. Authorized users can also add new survey sites via this dialog box, which can subsequently be linked to the survey unit.
Quantity	Enter the quantity that relates to the unit entered in the <b>Unit</b> field.
Unit of measurement	Select a relevant unit of measurement that applies to the survey unit. Example: if the survey unit relates to surfaces, square feet or square meters.
Floor	Select the floor on which the survey unit is located.
Space	Select the space in which the survey unit is located. The corresponding floor is automatically entered in the <b>Floor</b> field.

## Survey fields

Field	Description
Code	Enter a code for the survey.
Description	Enter a relevant description of the survey.
Survey project	Select the survey project to which the survey belongs from the dialog box available in this field. If you modify this field and the property entered in the <b>Property</b> field is not linked to the new survey project, the <b>Property</b> field is cleared.
Surveyor	From the dialog box available in this field, select the person who is responsible for inspecting the survey units in this survey.

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Field	Description
Property	Select the property to which the survey applies from the dialog box available in this field. You can only select a property that is linked to the associated survey project.
Is 'Assessment survey'?	If the field is set to <b>Yes</b> , you can register observations with scoring on multiple topics which will be processed to the assessment results in the Assessments and observations TSI. If the field is set to <b>No</b> , you can register defects and a technical condition score which will be processed into the asset condition data.
Assessment	This field is automatically filled with the assessment created while processing the survey in the Assessments and observations TSI.
Planned survey date	Select the planned survey date from the date-picker in this field. The selected date must be between the survey project's planned start and end dates.
Actual survey date	Select the date on which the survey actually takes place from the date-picker in this field.
System status	Displays the current system status of the survey.
Effective from	After processing the survey, this read-only field displays the date on which the new or updated condition data in Asset Management takes effect.
Last processed	After processing the survey, this read-only field displays the actual date-time the survey was processed.

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# Condition Surveys

In the **Surveys** TSI, you can create **Condition surveys** in which you prepare building survey projects and process data gathered during building surveys. The TSI interacts closely with the maintenance features available in the **Assets** , **Asset library**, **Planned Maintenance** and **Activity planner** TSIs.

**Condition Surveys** enables you to:

- Prepare building surveying projects;
- Import or export survey data from or to external surveying tools;
- Enter and maintain survey data;
- Gain insights in the technical condition of an asset or building element;
- Schedule and reschedule surveys.



For importing/exporting data from Planon ProCenter , see [Enterprise Talk](#).

## Condition Surveys – Concepts

This section describes the concepts available in **Condition Surveys** and how they interact with each other.

### Condition-based maintenance

Maintenance that is based on data regarding the technical condition of assets and building elements. This information is usually gathered during regular [surveys](#) of a specific site.

In Planon ProCenter , there are two TSIs supporting condition-based maintenance:

- **Condition Surveys** used together with the Assets TSI
- **Assets**

Building surveys are prepared and processed in **Condition surveys**. The processed information is subsequently used to update data in the Assets TSI. The updated information includes the *condition* (technical condition) and *quantity* of the assets and building elements involved. However, it is not mandatory to use **Condition surveys** to support condition-based maintenance. In **Assets** you can also directly maintain data on the condition of assets or building elements.


Based on the information in **Assets** about the condition of assets and building elements, a maintenance plan can be compiled in **Planned Maintenance > Maintenance Planner > Maintenance Planner**. This maintenance plan encompasses

all activities that are required to keep the surveyed assets / building elements in a previously determined condition.

## Condition cluster

Identical survey elements that are in the same technical condition at a given moment in time and that can therefore be clustered when the associated survey is processed.


While processing survey data in **Condition Surveys**, Planon ProCenter checks if there are matching cluster criteria for the survey elements in the survey. The data of identical survey elements with matching cluster criteria can be clustered and sent to the Assets TSI, to create new assets or building elements. The corresponding condition data includes information on the quantity, the observed condition and the risk score of the linked asset or building element.

 The survey elements that create new assets or building elements must be based on standard assets or standard building elements.


In Planon ProCenter, condition profiles and associated cluster criteria are added and maintained in Supporting data .

## Cluster profile

A set of default or additional criteria that is applied to cluster survey elements while processing survey data.

 In Planon ProCenter , survey cluster profiles and associated cluster criteria are added and maintained in Supporting data .

Cluster profiles are used in **Condition surveys** to apply default and additional cluster criteria to create new assets / building elements and asset conditions in the Assets TSI after processing survey data.

 To use **Survey site** as cluster criterion for condition data, configure a free field in Field definer for the following business object: Asset condition details > Asset condition details (from survey). For more information, see [Field definer](#).

## Defects catalog

A generic categorization of potential inadequacies or malfunctions occurring in or on assets and building elements.

Defects catalogs are added and maintained in **Supporting data** > **Defects catalog**.

## Defects list

A set of potential defects occurring in / on assets / building elements.

Defects lists are added and maintained in **Supporting data > Defects lists**. You can add/register a defect from a defects list to a survey element at **Observations > Observed defects**. In **Supporting data > Asset library** you can link a defects list to a standard asset or standard building element.

## Defect

A potential inadequacy or malfunction occurring in or on an asset or building element, affecting its technical condition.

In Planon ProCenter authorized users can add potential defects to a **Defects catalog** in **Supporting data > Defects**. Defects from the catalog can be selected when a defect is observed during a building survey.

## Non-cyclic maintenance regime

A *non-cyclic maintenance regime* is linked to an activity definition to ensure that an additional maintenance activity is scheduled for an asset / building element, with the aim to restore its condition to a predefined standard.

Activity definitions with a non-cyclic maintenance regime are aimed at fixing an observed defect in an asset or building element to improve their condition. A non-cyclic maintenance regime can be added to a:

- Maintenance activity definition in a maintenance plan in **Maintenance Planner > Definitions & schedules**;
- Survey activity definition in a survey project in **Condition Surveys > Observations**;
- Standard activity definition in the **Maintenance library > Standard activity definitions**.

## Observed defect

A fault, malfunction or other imperfection in an asset or building element that was found by a surveyor during a building survey or investigation.


In Condition surveys, observations can be added to a survey element at **Observations > Observed defects**. Observed defects can also be linked to a defect from the **Defects catalog**, which is available in **Supporting data** .



You can add or view relevant communication logs regarding this item, such as documents and photos. For more information on communication logs, see [Communication logs](#).

## Standard activity definition


A 'template' for an activity to be performed on assets or building elements that require maintenance.

 Planon ProCenter ensures that the field definitions of standard activity definitions and survey activity definitions are identical. So for example, if you change a field attribute for a standard activity definition, an identical field change is automatically implemented for all survey activity definitions.

Standard activity definitions cannot be added separately: they must be added to a selected standard service plan in **Maintenance Manager > Maintenance Library** at the **Standard activity definitions** selection level. In **Condition Surveys at Observations > Survey activity definitions**, standard activity definitions can be applied as a template to enter survey activity definitions. After being applied to a survey activity definition, they are used to compile maintenance plans in **Maintenance Planner**.


## Survey activity definition

A **survey activity definition** represents a non-cyclic maintenance activity that you can add during a condition survey. If surveyors observe a defect that requires additional or immediate attention, they can add a survey activity definition that includes detailed data on the condition of the surveyed asset or building element.

 It is also possible to add survey activity definitions for a survey element that is linked to a so-called **multiple asset**. This type of asset is registered in **Assets** as one record, but consists of many *identical* items with multiple locations. Example: **25** identical pieces of office furniture located on different floors or even in different buildings. You can create one or more survey elements for a multiple asset. Similarly, you can also create one or more survey activity definitions for a multiple asset. Keep in mind though that the **Quantity** you enter on the **Survey activity definition** must match the **Quantity** that is registered on the linked **Survey element**. The system will warn you if there is a discrepancy, enabling you to align the values.

In **Planon ProCenter**, survey activity definitions are added in Condition Surveys > Observations. Survey activity definitions can only have one type of:

- Maintenance regime: **Non-cyclic**
- Scheduling method: **Variable**

 Once orders are generated, the maintenance regime of a survey activity definition can no longer be modified.

## Survey element

An asset or building element whose condition must be surveyed.

In Planon ProCenter, survey elements are added and maintained in Condition Surveys > Survey elements.

# Working with Condition Surveys

This section describes the processes and tasks that can be performed in the **Condition Survey**.

## Adding a survey unit to a survey

You can add the physical location of the assets or building elements that must be surveyed.

### Procedure

1. Go to Survey units.
2. On the action panel, click Add.
3. Complete the relevant fields in the data section. For the description of these fields, refer to Survey unit fields.
4. Click Save.

## Adding a survey element to a survey unit

You can add a part of an asset or building element that must be surveyed.

### Procedure

1. Go to Survey elements.
2. On the action panel, click Add.
3. Complete the relevant fields in the data section. For a description of these fields, refer to Survey element fields.
4. Click Save.

## Adding observed defects to a survey element

You can add one or more observed defects to a survey element.

### Procedure

1. Go to Observations > Observed defects.
2. On the action panel, click Add.
3. Complete the relevant fields in the data section. For a description of these fields, see Observed defects fields.
4. Click Save.



You can add or view relevant communication logs regarding this item, such as documents and photos. For more information on communication logs, see [Fundamentals](#).

To know more about extent, intensity and severity values, see [Survey standard](#).

## Adding a survey activity definition to a survey element

You can add a survey activity definition to a survey element.

### Procedure

1. At Observations > Survey activity definitions, click Add on the action panel.
2. Complete the relevant fields in the data section. For a description of these fields, refer to Survey activity definition fields.
3. Click Save.
4. If relevant, you can add expected costs to the new survey activity definition, at Expected costs.

## Linking a survey activity definition to an observed defect

You can link a survey activity definition to an observed defect.

In Planon ProCenter, linking a survey activity definition to an observed defect means that after the survey activity has been completed, the linked observed defect is rectified and closed. In this procedure it is assumed that the observed defect is already added and available to be linked to the survey activity definition.

### Procedure

1. Go to Observations > Survey activity definitions.
2. Select an existing survey activity definition from the list or add a new survey activity definition.
3. On the action panel, click on Defects to be solved.
4. Select an observed defect from the list.

**This defect will be addressed and closed when a survey activity is conducted. Repeat this step to link additional observed defects to the survey activity definition.**

5. Click OK.

To learn more about survey activity definitions, see [Survey activity definitions in Planned Maintenance](#).



## Applying a standard activity definition to a survey element

You can apply a 'template' to create a survey activity definition that is pre-populated with data.

### Procedure

1. Go to Observations > Survey activity definitions.
2. On the action panel, click Apply standard activity definition.
3. In the Standard activity definitions dialog box, select the standard activity definition you want to apply.
4. The dialog box displays the following options:
  - **All:** shows all standard activity definitions.
  - **Assets:** only shows standard activity definitions that have a linked defect which is also linked to a survey element associated to an asset with that same defect.
  - **Observed defects:** only shows standard activity definitions that have a linked defect which is also linked to a survey element via an observed defect.
5. In the Survey element dialog box, select the survey element for which you want to add a survey activity definition.
6. Click the relevant options if you want to copy additional costs, material costs and labor hours to the contract service plan.
7. Click OK.

A survey activity definition, based on a standard activity definition, is now added. If relevant, you can add expected costs to the new survey activity definition, at **Expected costs**.

## Adding expected costs

You can specify the expected maintenance costs for a survey activity definition. There are three types of expected costs: additional costs, material costs and labor hour costs.

### Procedure

1. Go to Observations.
2. Select the survey activity definition to which you want to add expected costs.
3. At Expected costs, click Add material costs, Add additional costs or Add labor hours.
4. On the data panel, complete the relevant fields. For a description of these fields, refer to Expected costs.
5. Click Save.

The expected costs are now added to the selected survey activity definition. When maintenance orders are generated, the expected costs are transferred to the order lines and estimates of the generated maintenance orders in the **Orders** TSI.

## Processing survey data

You can populate or update the Assets Pro TSI with information about surveyed assets and building elements.

If survey elements are based on a standard asset then new assets or building elements with condition data and details are created, using the **Cluster profile** field.

If they are based on an existing asset or building element, condition data and condition details are added to these existing assets or building elements.

### Prerequisites

- A relevant survey project is available in Condition Surveys > Survey projects, (see [Adding a survey project](#)). This survey project is linked to one or more properties.
- To be processed, the surveys in the project must be in the **Ready for processing** status.
- Relevant survey elements are available in **Condition Surveys** along with their condition score, risk score, location, and cluster criteria.

### Procedure

1. At Survey projects, select the relevant survey project.
2. On the action panel, click Process survey data.

**The Process survey data dialog box appears.**

3. Select one or more properties whose survey data you want to process.
4. In the Condition data effective date field, select a date on which the survey data is applicable.
5. In the Cluster profile field, select a relevant cluster profile based on which you want to add new assets or update existing assets in **Assets**




For more information on defining cluster profiles, see [Survey cluster profiles](#) (Supporting Data).

6. Click OK.

When the survey project is processed, the **Processed** status is assigned to the surveys in the project. The data existing for the survey elements updates the **Assets** TSI:

- By adding new assets or building elements with associated condition data and condition details.
- By adding condition data and condition details to existing assets and building elements.

If new assets or building elements are created based on a standard asset or standard building element, associated items such as sub assets, defects lists, standard service plans and standard asset components are by default copied to the new asset after processing a survey.

 **Condition details** that were added through the **Process survey data** action in **Condition Surveys** become read-only and cannot be manually deleted from **Assets** .

## Clearing generated survey data - Condition Surveys


You can clear generated survey data in order to amend survey data. Subsequently, you can regenerate the data by clicking **Process survey data** on the action panel.

### Prerequisites

- A relevant survey project is available in Condition Surveys > Survey projects, (see [Adding a survey project](#)).
- This survey project is linked to one or more properties.
- The surveys in the project must be in the **Processed** status.
- The **Clear generated survey data** action must be added to the **Condition Surveys** layout.

### Procedure

1. Go to Survey projects.
2. Select a survey project from the list.
3. On the action panel, click Clear generated survey data.
4. In the dialog box, select a property whose generated survey data you want to clear.
5. Click OK, the generated survey data is purged for all the surveys of the selected property.

 The status of the survey(s) is changed to **Ready for tuning**. You can now change the survey data and you can subsequently regenerate the survey data.

If survey data is used in maintenance plan, its generated survey data can only be cleared by deleting links to the plan. In addition, maintenance activity definitions using this data must also be deleted.

## Modifying existing survey data

### Prerequisites

To be able to modify the survey data of an existing survey, the survey must be in either the **In preparation**, **In progress – in Planon** or the **Ready for tuning** status.

## Procedure

1. Go to Survey Projects.
2. Select the survey project you want to modify and go to Surveys.
3. Select the survey and the status you want to assign to it.
4. A warning message appears when you change the survey status.
5. Click Proceed.

The outdated condition data and condition details linked to the survey are deleted from the Assets TSI.

1. If a maintenance plan already exists whose activity definitions refer to this survey's asset condition details, an error message appears.
2. Click **Cancel**.
3. In **Maintenance planner**, manually delete the associated activity definitions from the maintenance plan.
4. In **Condition Surveys**, select a relevant status. The survey status is modified. You can now edit the survey project data.

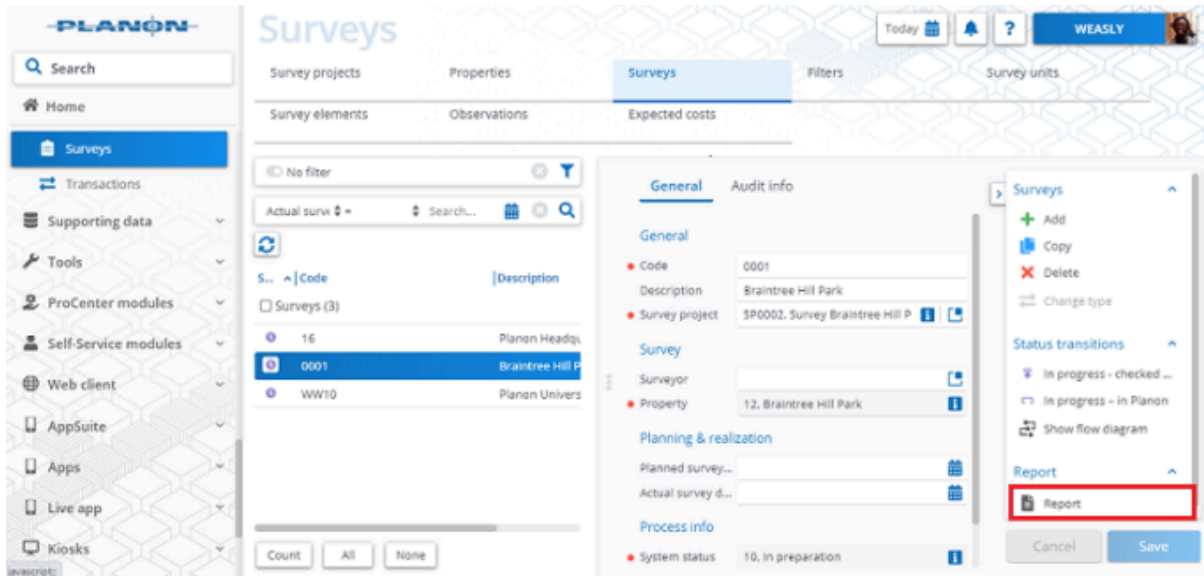


If orders were already generated for the activity definitions, you cannot change the survey data.

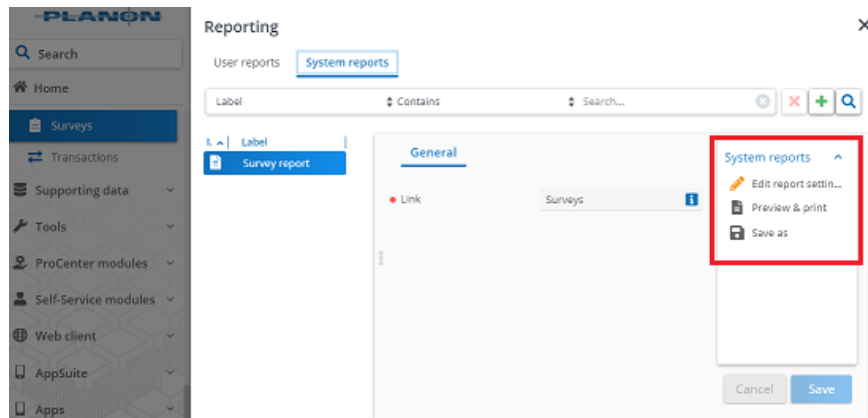
## Generating the survey system report

### Procedure

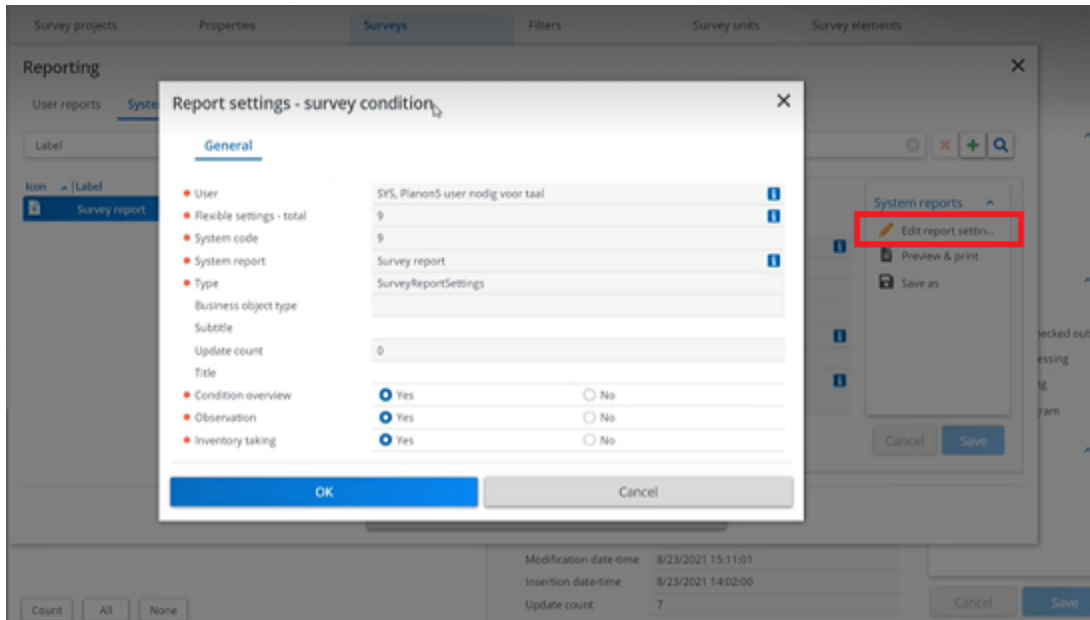
1. In the Surveys TSI, go to Survey.
2. Select the survey you want to include in your report. You can select only one survey for this report.



3. On the action panel, click Report.  
The Reporting window opens.



4. Click the System reports tab.
5. Edit the report settings, if required.




- **Condition overview:** Select **Yes**, to display the compact list view of survey element conditions sorted by the classification.
  - **Observation:** Select **Yes**, to display the overview of surveyed survey elements and observed defects with an image accompanying the survey element.
  - **Inventory taking:** Select **Yes**, to display the overview of all surveyed survey elements with the observed defects when applicable.
6. Click OK.
  7. Select relevant output options. You can Preview & print or Save as your report.

## Condition Surveys – Field Descriptions

### Survey element fields

Field	Description
Standard asset / building element	If no asset or building element is specified in the <b>Asset / building element</b> field, select a standard asset / standard building element on which the survey element can be based.
Asset / building element	Select the asset / building element represented by the survey element. You can only select assets / building elements that are linked to the surveyed property via their asset location. The asset or standard asset that you link to the survey element must have the value <b>Yes</b> in the <b>Simple</b> field, as

Field	Description
Code	Enter a code for the survey element.
Description	Enter a relevant description for the survey element.
Survey unit	<p>Select the survey unit to which the survey element belongs. A modification in this field can cause the data in the <b>Alternative classification</b> field to change accordingly. The dialog box displays two options:</p> <p><b>All:</b> shows the list of all survey units from all the surveys.</p> <p><b>Survey survey units:</b> shows the list of survey units that are related to the survey.</p>
Survey result	This field displays the survey result that the surveyor can select from a user-defined picklist on the Mobile Condition Assessor (MCA) app.
Image	This field displays the image of the <b>Survey element</b> that the surveyor can view / add using the Mobile Condition Assessor (MCA) app.
<div style="border: 1px solid black; padding: 5px;"> <p> The <b>Survey result</b> and <b>Image</b> fields store information in Planon ProCenter that was added by the surveyor via the MCA app.</p> </div>	
Alternative classification	Select an alternative classification that applies to the survey element.
Location	If relevant, enter additional information about the survey unit's location.
Quantity	Enter the quantity that relates to the unit entered in the <b>Unit</b> field.
Comment	If relevant, enter a comment on the survey element.
Unit of measurement	Select a relevant unit of measurement that applies to the survey element.
Condition score calculated	This field displays the calculated condition score representing the asset's or building element's condition before maintenance has taken place.
Condition score manual	Enter a condition score representing the asset's or building element's observed condition before maintenance has taken place. You use this field

Field	Description
	if you want to overrule the value in the <b>Condition score calculated</b> field.
Risk score	Enter (import from external tool) the risk score of the survey element indicating the urgency for repair, according to the risk ranking matrix that is applicable in your organization.

## Observed defects fields



Field	Description
Defect	Select a relevant defect that applies to the survey element. The dialog box displays two options: <b>All:</b> shows all defects in the <b>Defect catalog</b> . <b>Asset defects:</b> shows the list of defects that is linked to the asset / building element associated with the survey element.
Survey element	This field displays the survey element you drilled down from. If relevant, select another survey element from the dialog box. The dialog box displays two options: <b>All:</b> shows the list of all survey elements from all the surveys. <b>Survey survey elements:</b> shows the list of survey elements that are related to the survey.
Code	Enter a code for the observed defect.
Description	This field displays the description of the selected defect.
Severity	The influence that a defect has on the operability of a construction or an installation. Select a relevant value from the list.
Intensity	An indicator which marks the phase in which the defect occurs. Condition surveys have three stages. Select a relevant value from the list.
Extent	Extent is the proportion in which a defect is present in relation to the total surveyed construction or an installation. It can be expressed as an area, a piece, unit of length or a number. Select a relevant value from the list.



Field	Description
Extent percentage	The extent percentage is automatically calculated based on the extent value. Refer to <b>Survey standard</b> in Supporting data , to look up the extent percentage for a given extent value. This field can be manually changed. Be aware that the <b>Extent</b> field is updated with the extent percentage.
Condition score	The value is calculated if the <b>Condition score calculation method</b> field on the Survey project is filled with a NEN method. If the <b>Condition score calculation method</b> field is empty, then the condition score on the observed defect is also empty.
Comment	If relevant, enter a comment on the observed defect of the survey element.

## Survey activity definition fields

Field	Description
Maintenance regime	This field displays the type of maintenance that applies to the base asset (asset or building element) in the survey activity definition: by default, a survey activity definition is assigned a <a href="#">Non-cyclic maintenance regime</a> .
Standard activity definition	Select the relevant standard activity definition, to apply a template activity definition when entering a new survey activity definition. You can also use the <a href="#">Apply standard activity definition</a> option on the action panel.
Code	Enter a code for the survey activity definition.
Description	Enter a relevant description of the survey activity definition.
Survey element	This field displays the survey element you descended from. If relevant, you can select another survey element.
Asset classification	Select an asset classification from the dialog box available in this field.
Activity type	Enter the type of maintenance that applies to the activities generated from the survey activity

Field	Description
Scheduling method	<p>definition: routine, statutory, other mandatory or replacement.</p> <p>Select a scheduling method for the survey activity definition from the dialog box available in this field. There are three methods available: <b>Variable method</b>, <b>Fixed method</b> and <b>Fixed completion method</b>.</p> <div data-bbox="602 520 1317 674" style="border: 1px solid red; padding: 5px;"> <p> The <b>Scheduling method</b> can only be changed if a maintenance order has not yet been generated, or if all corresponding maintenance activities are in either the <b>Completed</b> or the <b>Canceled</b> status.</p> </div>
Clustering allowed (Y/N)	Specify if the clustering of scheduled activities is permitted or not.
Budget definition	<p>Select a budget definition from the dialog box available in this field. This dialog box contains the budget definitions specified in Supporting data . After you have linked a budget definition, you can generate maintenance budgets in the Budgets TSI for the maintenance activities of a specific property and for a specific financial year.</p> <p>For details on this subject, see <a href="#">Budgets</a>.</p>
Comment	If relevant, enter a comment on the survey activity definition.
Functional class	Select a functional class from the dialog box available in this field.
Inspection regime	Select an inspection regime from the dialog box available in this field.
Order group	Select an order group from the dialog box available in this field. This field must be completed to generate orders.
Percentage to be completed	Enter a value that represents the percentage of work planned to be completed.
Post-maintenance condition	Select a post-maintenance condition from the dialog box available in this field.
Quantity	Enter a quantity for the value that you entered in the <b>Unit</b> field. For example the number of square feet of an asset that needs to be painted.
	<p> If the asset that is filled in on the linked survey element is (part of) a <b>multiple asset</b>, the quantity entered here</p>

Field	Description
	should not exceed the quantity registered on the survey element.
Recommended execution date	After the import of survey data, this field displays the execution date that is recommended by the maintenance inspector. This date can be modified as required.
Standard order	Select the relevant standard maintenance order from the dialog box available in this field. This field must be completed to generate orders.
Trade	Displays the selected trade. You can select another trade from the dialog box available in this field.
Unit	Select a relevant unit of measurement from the dialog box available in this field. This field refers to the value specified in the <b>Quantity</b> field.
User-definable classification 1 & 2	Select a user-definable classification from the dialog box available in this field.
Work type	Displays the selected work type. You can select another work type from the dialog box available in this field.

## Expected costs fields

Field	Description
Survey activity definition	Select a survey activity definition from the dialog box available in this field.
Description	Enter a relevant description for the expected costs.
Required quantity	Enter the quantity referring to the purchase item or number of labor hours needed to complete the activity on one asset.
Produced quantity	Enter the same value as the value in the <b>Quantity</b> field in the activity definition. This is the quantity that must be produced by means of the value specified in <b>Required quantity</b> .
Unit of required quantity	Select a relevant unit of measurement from the dialog box available in this field. The selected unit applies to the value in the <b>Required quantity</b> field.

<b>Field</b>	<b>Description</b>
Unit of produced quantity	This read-only field displays the unit that applies to the value in the <b>Produced quantity</b> field.
Hourly wage	If you are adding labor hour costs, enter the relevant hourly wage in this field.
Standard cost category	Select a standard cost category from the dialog box available in this field. A standard cost category is a classification of the costs according to function.
Standard cost type	Select a standard cost type from the dialog box available in this field. A standard cost type is a classification of the costs according to type.
Activity definition - cost type	Select a cost type from the dialog box available in this field. There are two types of costs: <b>Fixed</b> costs and <b>Variable</b> costs.
Price per unit	Enter the price per unit of the product that you entered in the <b>Purchase item</b> field.  <b>Example:</b> \$50 for an air conditioning filter.
Purchase item group	If you are adding material costs, select a relevant purchase item group from the dialog box available in this field. A purchase item group is a classification of the items that can be purchased within an organization.
Purchase item	If you are adding material costs, select the product that you want to order from the dialog box available in this field.
Standard order quantity	This read-only field displays the prescribed number of purchase items that must be ordered at a time.
VAT / Tax rate	Select a VAT (tax) rate from the dialog box available in this field.
Tariff group	If you are adding labor hour costs, select the tariff group that applies to the hourly wage, from the dialog box available in this field.

# Assessment surveys

In **Surveys** TSI, you can create assessment surveys and register the observations you made during an inspection, together with scoring on multiple topics. This data will be processed as assessment results in the Assessments and observations TSI.

For **assessment surveys** you can:

- Create [Survey objects](#);
- Register [Observations](#) for a survey object;
- Register [Follow-up actions](#) for the survey observations;
- Enter and maintain survey data.

## Assessment Surveys – Concepts

This section describes the concepts available for **Assessment surveys** and how they interact with each other.

### Aggregated score

**Aggregated score** on asset/space/property can be used to gain insights on multiple topics related to the asset/space/property. The aggregated score can be added manually. **For example:** An asset can have aggregated score on **Fire**, **Energy** and **Security**. For more information on topics, see [Topics](#).

As a surveyor, you can manually add an aggregated score for one or more topics directly on a survey object. For more information, see [Adding an aggregated score to a survey object](#).

### Follow-up action

When you have made an [observation](#), you might also want to register one or more actions to actually follow-up on your findings.

During an assessment survey, you can register one or more follow-up actions for the observations you made. **For example:** an action to add a hazard in the **Health and Safety > Hazard registry** or an action to resolve the issue from the observation directly via a work order / activity definition.

### Follow-up action specifications

If you want to add more details to a follow-up action, you can add additional action specifications. For an action specification, you can configure free fields to register the required materials, number of persons, number of hours etc. For more information, see [Configuring survey follow-up action specifications](#)

Once configured, you can link the specification(s) to a relevant follow-up action. For more information, see [Adding survey follow-up action specifications](#).

## Observation

An observation is the objective registration of *risks* or *opportunities* that are related to an asset.

**For example:** A surveyor might observe *single glass window* at a specific location.

## Observation score

When you add an observation for a surveyed asset or building element, you can also register scores on one or more relevant topics.

**For example:** For a *single glass window* you might register a *high risk* score on energy, a *medium risk* score on security, and a *good* score for the technical state of the window.

## Survey object

In Planon ProCenter , a survey object represents an asset or a building element that needs to be inspected on a regular basis and for which you want to process the resulting survey data into the Assessments and observations TSI. You can add and maintain survey object data in Planon ProCenter , at [Surveys > Survey objects](#).

# Working with Assessment Surveys

This section describes the processes and tasks that can be performed in the **Assessment Survey**.

## Adding a survey object to a survey

The procedure to add a survey object to a survey is as follows:

### Procedure

1. Go to [Survey elements > Survey objects](#).
2. On the action panel, click **Add**.
3. On the data panel, complete the relevant fields. For a description of these fields, see [Survey object fields](#).

4. Click Save.

**The survey object is now added to the survey.**

## Adding an observation to a survey object

The procedure to add an observation to a survey object is as follows:

### Procedure

1. Go to Observations.
2. On the action panel, click Add.
3. On the data panel, complete the relevant fields. For a description of these fields, see Observation fields.
4. Click Save.



You can add or view relevant communication logs regarding this item, such as documents and photos. For more information on communication logs, see [Fundamentals](#).

**The observation is now added to a survey object.**

## Adding an observation to the survey object based on a standard observation

You can add an observation based on a standard observation either by:

- selecting a standard observation via the **Apply standard observation** option on the action menu.
- or
- by adding an observation and subsequently selecting a standard observation on the **Standard observation** field.

### Procedure

1. Go to Observations.
2. On the action panel, click Apply standard observation.
3. The Apply Standard observation dialog box appears.
4. Select a standard observation from the list.



Use the filter bar at the top of the dialog box to filter out relevant standard observation.

5. Select a **Survey object** from the dialog box available in the **Survey object** field.



If you drill down from a **Survey object**, this field will be filled in automatically.

6. Click OK.

**A new observation is added to survey object, whose data fields are filled with data from the standard observation.**

7. Enter any additional data you may want to add in the relevant fields, or modify the data you may want to change and click Save.

## Adding a follow-up action to an observation

The procedure to add a follow-up action to an observation is as follows:

### Procedure

1. Go to Details > Follow-up actions.
2. On the action panel, click Add.
3. On the data panel, complete the relevant fields. For a description of these fields, see Follow-up action fields.



- To create a *general* follow-up action, leave the fields **Standard order**, **Standard activity definition** or **Hazard type** empty.
- If you fill in the **Standard order** field an **Order follow-up action** is created.
- If you fill in the **Standard activity definition** field an **Activity definition follow-up action** is created.
- If you fill in the **Hazard type** field an **Hazard follow-up action** is created.

4. Click Save.

**The follow-up action is now added to the observation.**

## Linking observations to a follow-up action

You can link an observation to a follow-up action to resolve the problem that was registered in the observation.

The procedure to link observations to a follow-up action is as follows:

1. Go to Details > Follow-up actions.
2. Select a follow-up action in the elements panel.
3. On the **Links** action panel, click **Link observations**.



The **Link observations** dialog box opens. This dialog box only displays the observations that are linked to the selected survey.

4. At **Available**, select the observations that you want to link to the follow-up action.
5. Click the right arrow button to transfer the observations to **In use**.





To unlink observations from the follow-up action: select the relevant observations in **In use** and click the left arrow button.

6. Click **OK**.

The selected observations are now linked to the follow-up action.

## Configuring survey follow-up action specifications

You can enrich your follow-up actions with additional **specifications**. These specifications can be configured to your requirements, using a set of free fields.

For more information about free fields see [Field types](#).

Examples of the type of information you can add in the specifications are:

- Products from the product catalog and their quantity
- Number of people required to complete the action
- Number of hours required to complete the action

### Procedure

1. On the navigation panel, go to **ProCenter modules > TSIs** and make sure that the **Follow-up details** selection level and the **Specifications-survey follow-up actions** selection step are added to the **Surveys** TSI. For more information, see **TSIs > Configuring selection levels and selection steps**.
2. In the **Field definer** TSI, select the **Specifications-survey follow-up actions** business object and change the status to **Under construction**.
3. On the **Details** level, set the required free fields to **In use = Yes** and click **Save**.
4. Enter a relevant **User-defined system name** for each of the free fields and select and save any other relevant field settings. For example **Field type**, **In selection** and **Translated names**. For more information, see **Field definer > Setting field attributes**.
5. Go back to the **Business objects** level and change the status to **Completed**.
6. Navigate to the **Layouts** TSI and select the **Specifications - survey follow-up actions** business object.
7. Go to the **Layouts** step and set the **SurveyActionSpecification** layout under construction.
8. On the **Layout** data panel, click on a random spot in the list of currently available fields.
9. On the **TSI fields** tab > **Unused fields** section, select the free fields you have just configured and drag them to the required spot on the layout.
10. Click **Save**.

11. Set the layout status to **Completed** by clicking the padlock icon.
12. Log out of Planon ProCenter and log in again.
13. Proceed with Adding survey follow-up action specifications.

## Adding survey follow-up action specifications

You can add additional specifications to a follow-up action. **For example:** About the required number of people or the number of hours to execute the follow-up action. These additional details are called **Specifications - survey follow-up actions**. For information on how to configure this, see [Configuring survey follow-up action specifications](#). Once configured, you can link the specifications to a follow-up action by following this procedure.

### Procedure

1. Go to the **Surveys TSI > Details level > Follow-up actions** step.
2. Select the follow-up action to which you want to add specifications.
3. Go to the **Follow-up details level > Specifications - survey follow-up actions** step.
4. On the action panel click **Add**.
5. Enter a **Code** and a **Description**.
6. In the **Follow-up** action field, select the relevant follow-up action.
7. Fill in the configured free fields as required.
8. Click **Save**.

## Adding a survey observation score to an observation

There are 3 types of observation scores that can be added to an observation:

- Survey scores - basic
- Survey scores - matrix
- Survey scores - technical condition

The type of scoring can be configured per topic. For example:

- Security topic might use matrix scoring
- Performance / Energy topics might use basic scoring
- Maintenance topic might use technical condition scoring.

The procedure to add a survey observation score to an observation is as follows:

1. Go to Details > Survey observation scores.
2. On the action panel, click Add Survey scores - basic or Add Survey scores - technical condition or Add Survey scores - matrix.
3. On the data panel, complete the relevant fields. For a description of these fields, see Survey observation score fields.

4. Click Save.

**The survey observation score is now added to the observation.**

## Adding an aggregated score to a survey object

The procedure to add an aggregated score to a survey object is as follows:

### Procedure

1. Go to Observations > Aggregated scores.
2. On the action panel, click Add.
3. On the data panel, complete the relevant fields. For a description of these fields, see Aggregated score fields.
4. Click Save.

**The aggregated score is now added to the selected survey object.**

## Processing survey data - Assessment surveys

### Prerequisites

- A relevant survey project is available in the **Surveys** TSI. This survey project is linked to one or more properties.
- The assessment surveys in the project are in the **Ready for processing** status.
- The **Is Assessment survey?** field of the relevant assessment survey(s) is set to **Yes**.
- Relevant survey objects are available in **Surveys** along with their observations, observation score, aggregated score and follow-up actions.

### Procedure

1. At Survey projects, select the relevant survey project.
2. On the action panel, click Process survey data.

**The Process survey data dialog box appears.**

3. Select one or more properties whose assessment survey data you want to process.



If the survey project contains condition surveys then the **Condition data effective date** and the **Cluster profile** fields are visible.

4. Click OK.



Once the **Assessment survey** is processed, it will become 'read-only', and no addition or editing of data will be possible.

When the survey project is processed, the status of each survey in the project is set to **Processed**. The observations, scoring, follow-up actions and follow-up action specifications that are related to the survey objects are processed into the Assessments and observations TSI:

- The survey is processed into an **Assessment result**.
- Survey observations are processed into an **Observation** including the **Scoring, Follow-up actions** and **Specifications - survey follow-up action**.
- Survey object **Aggregated score** is processed into an aggregated score of the property / space / asset.
- When an existing observation that has already ended in Planon ProCenter is surveyed again, the survey data related to that observation, as well as any new scoring or follow-up actions, will be skipped or not processed.



It is not possible to clear processed survey data from an **Assessment survey**.

## Assessment Surveys – Field Descriptions

### Survey object fields

Field	Description
Asset / building element	Select an asset / building element to which the survey object refers, from the dialog box available in this field.
Code	Enter a code for the survey object.
Description	Enter a name for the survey object.
Survey object subtype	Displays the survey object subtype to which a survey object belongs, for example SURVEY_ASSET.
Survey	Select the survey to which the survey object belongs, from the dialog box available in this field.
Survey unit	Select the survey unit to which the survey object belongs, from the dialog box available in this field. This is an optional field.

### Observation fields

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<b>Field</b>	<b>Description</b>
Start date-time	Select a start date and time from the date-time picker.
Code	Enter a code for the survey observation.
Description	Enter a name for the survey observation.
Survey object	Select a survey object to which the survey observation belongs from the dialog box available in this field.
End date-time	Select an end date and time from the date-time picker.
Observation group	If relevant, select an observation group to which the survey observation belongs from the dialog box available in this field.
Observation	This field is automatically filled with the observation created while processing the survey observation in the Assessments and observations TSI.
Standard observation	If available, select a relevant standard observation from the dialog box available in this field.
Comment	If relevant, enter a comment on the survey observation.
Recommendation	If relevant, enter a recommendation on the survey observation.

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## Follow-up action fields

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<b>Field</b>	<b>Description</b>
Code	Enter a code for the survey follow-up action.
Description	Enter a name for the survey follow-up action.
Evaluation required?	Select <b>Yes</b> if evaluation is required for the survey follow-up action. By default, the field is set to <b>No</b> .
Follow-up action subtype	This field is automatically filled with the follow-up action created while processing the survey action in the Assessments and observations TSI.
Due date-time	Select a date and time from the date-time picker.

Field	Description
Expected costs	Enter the expected costs for the survey follow-up action in this field.
Hazard type	Select a relevant hazard type.  <div data-bbox="602 407 1317 562" style="border: 1px solid #00a0e3; padding: 5px;">  While processing, the system will create a hazard follow-up action and the follow-up action will create a hazard based on this hazard type in the <b>Hazard registry</b> TSI. </div>
Standard activity definition	<div data-bbox="602 562 1317 659" style="border: 1px solid #e31a1c; padding: 5px;">  (feature not yet available!) </div> Select a relevant standard activity definition in this field. When processing the survey data an activity definition will be created, based on this standard activity definition in the Objective-based maintenance solution, which is expected to be released mid 2024.  <div data-bbox="602 879 1317 1035" style="border: 1px solid #00a0e3; padding: 5px;">  While processing, the system will create an activity follow-up action that will create an activity definition, in the <b>Activity planner</b> TSI, based on this standard activity definition. </div>
Standard order	Select a relevant standard order in this field. When processing the survey data an order will be created based on this standard order in the <b>Orders</b> TSI.  <div data-bbox="602 1163 1317 1287" style="border: 1px solid #00a0e3; padding: 5px;">  While processing, the system will create an order follow-up action and the follow-up action will create an order based on this standard order in the <b>Orders</b> TSI. </div>
Survey observation	This field displays the observation, if the survey action is related to a specific observation.  <div data-bbox="602 1381 1317 1472" style="border: 1px solid #00a0e3; padding: 5px;">  If you select a survey observation you cannot select a survey. </div>
Survey	This field displays the survey, if the survey action is related to a specific survey.  <div data-bbox="602 1566 1317 1654" style="border: 1px solid #00a0e3; padding: 5px;">  If you select a survey you cannot select an survey observation. </div>

## Survey observation score fields

Field	Description
Code	Enter a code for the observation score.
Date-time of score	Select a date and time from the date-time picker.
Survey observation	This field displays the survey observation you navigated from. If relevant, you can select another survey observation.
Standard observation	If the observation is created using standard observation, this field will be filled in automatically.
Topic level	Select a topic level from the dialog box available in this field.
Topic	Select a topic from the dialog box available in this field.
Topic score type	Displays the topic scoring method: <ul style="list-style-type: none"> <li>• Basic scoring</li> <li>• Matrix scoring</li> <li>• Technical condition scoring</li> </ul>
Score	Manually enter the score for the survey observation in this field.
<b>Technical Scoring</b>	
Extent	Extent is the proportion in which an observed issue is present in relation to the total surveyed construction or an installation. Select the relevant extent for the observation, from the dialog box available in this field. The values for extent range from 1 to 5: <ul style="list-style-type: none"> <li>• 1 - 1%</li> <li>• 2 - 2% to 9%</li> <li>• 3 - 10% to 29%</li> <li>• 4 - 30% to 69%</li> <li>• 5 - 70% to 100%</li> </ul> <p>This field is aligned with the <b>Extent percentage</b> field on the <b>Topic score</b>, which means that if you fill in a value in this field, it is also filled on the topic score, and vice versa.</p>

<b>Field</b>	<b>Description</b>
Intensity	An indicator which marks the phase in which the observed issue occurs. Select the relevant intensity for the observation, from the dialog box available in this field. The values for intensity range from 1 to 3: <ul style="list-style-type: none"> <li>• 1 - First stage</li> <li>• 2 - Advanced stage</li> <li>• 3 - End stage</li> </ul>
Severity	The influence that an observed issue has on the operability of a construction or an installation. Select the relevant severity for the observation, from the dialog box available in this field. The values for severity range from 1 to 3: <ul style="list-style-type: none"> <li>• 1 - Minor</li> <li>• 2 - Serious</li> <li>• 3 - Critical</li> </ul>
Extent percentage	Manually enter the extent percentage for the survey observation in this field.
<b>Matrix Scoring</b>	
Topic likelihood	Select the topic likelihood from the dialog box available in this field.
Topic severity	Select the topic severity from the dialog box available in this field.

## Aggregated score fields

<b>Field</b>	<b>Description</b>
Code	Enter a code for the aggregated score.
Date-time of score	Select a date and time from the date-time picker.
Survey object	Select a survey object to which the aggregated score belongs, from the dialog box available in this field.
Topic	Select a relevant topic from the dialog box available in this field.
Topic level	Select a topic level from the dialog box available in this field.



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<b>Field</b>	<b>Description</b>
Score	Enter the score for the survey observation in this field. The entered score value is looked up in the topic range and the topic level is filled in automatically.

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