Online Release Notes

Planon Software Suite
Version: L120

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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Introduction

This section provides some context that will help you understand who we are and what we do.

About us

Planon is the recognized world leader in Smart Sustainable Building Management software

Our clients have selected Planon for our ability to effectively evaluate their challenges and move quickly to deliver solutions that address their unique needs.

We are recognized as a world market leader by Verdantix, IDC, Gartner and Frost & Sullivan since 2006.

The Planon company is headquartered in the Netherlands and has offices across the globe.

> For more information, please visit the Planon website or take a look at this video about The story of Planon (Dutch spoken, English subtitles).

Building connections

We **create connected places** where people work, live, play and learn, creating a positive impact on our users' lives and our planet. We believe your employees deserve a workspace they can thrive in.

By eliminating data silos and aligning solutions into one shared information platform, we empower all building stakeholders – owners, investors and developers, users and service providers – with actionable and meaningful insights.

Some facts

- Planon was founded December 18, 1982

- 1000+ employees around the globe

- Offices in 16 countries

- 3250+ clients worldwide

- More than 3 million users

What we do

We are the leading provider of smart and sustainable building management software solutions.

We believe that building owners, users, service providers, developers and investors deserve seamless and connected experiences. We connect buildings, people and processes, by eliminating data silos and aligning solutions into one shared information platform. Through our solutions, we empower all building stakeholders with actionable and meaningful insights, resulting in efficiently operated and sustainable buildings with fit for purpose workplaces.

Solutions

Our advanced capabilities help optimize workplace performance across all industries. They simplify business processes and reduce costs throughout the real estate life cycle, which is beneficial for professionals in many roles.

Our leading digital platform for Smart Sustainable Building Management provides you with:

- **Comprehensive functionality** for processes in real estate, maintenance, workplace, services and sustainability management.

- A **central platform** to improve building operations for all parties: real estate owners, building users and service providers.

- **Scalable and flexible IoT-enabled solutions** that transform buildings into smart sustainable buildings.

- **Seamless integrations** with your business-critical applications and a wide range of standardized connectors and specialized apps from our partners.

- Tools that assist in creating **sustainable and net-zero buildings** that promote healthy and productive work, learning, and collaboration environments for people.

- On top of our software solutions we offer a **comprehensive portfolio of life-cycle services** to ensure successful implementation, fast adoption, and best value for money.

Innovation

Are we doing the right things and are we doing them right? These are questions we ask ourselves when it comes to our product offering, but also about customer satisfaction and technical solutions.

Planon's IWMS solution is the stepping stone for many other ventures and solutions, including a solution for Service Providers, Financial Professionals (Lease Accounting), and IoT.

Innovation is a core value and the driving force of the Planon software.

Accelerator

Planon delivers a best practice configuration called Accelerator.

Accelerator includes a library of preconfigured processes, such as workflows, catalogs, reports, dashboards, templates, roles, authorizations, data import facilities and configuration descriptions.

Accelerator is a ready-to-use solution that allows customer to efficiently and effectively run operations and significantly reduce implementation time.
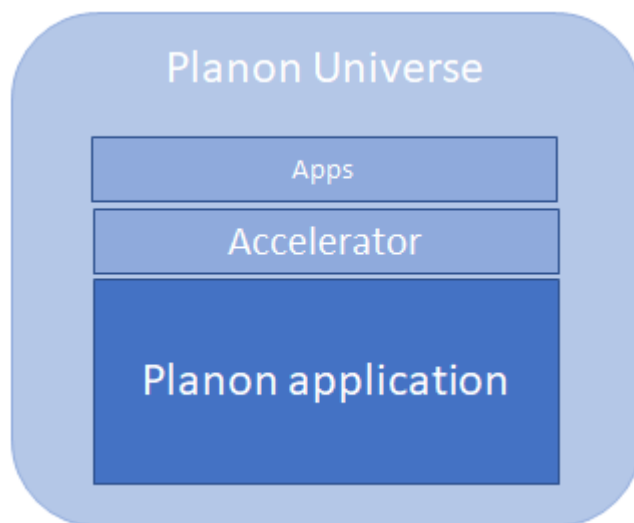
The Planon software is flexible, Accelerator can be further adapted to include innovations and new business processes easily.

> *Planon Universe is an innovative software platform that combines configurable standard software with state of the art integration technology, proven best practices and professional services.

Planon Live

Planon has transformed its software releases into a continuous delivery, known as Planon Live.

In the recent past, Planon used to deliver its newest software in annual releases. At the time, this worked for the market and for Planon:

- Customers could prepare for upgrades
- Planon could develop and test comprehensive solutions

That's the limit

More recently, this model has met its limits. Often, customers would upgrade to a later release while skipping intermediate releases. The reality thus being, that customers could only benefit from new features a long time after they were developed. Too little, too late.

Planon Live

Because of the need to push features to the market faster and because it was now able to it through increased automation (testing, building software), Planon changed the frequency of its releases from annual to monthly, thus creating a continuous delivery model: Planon Live.
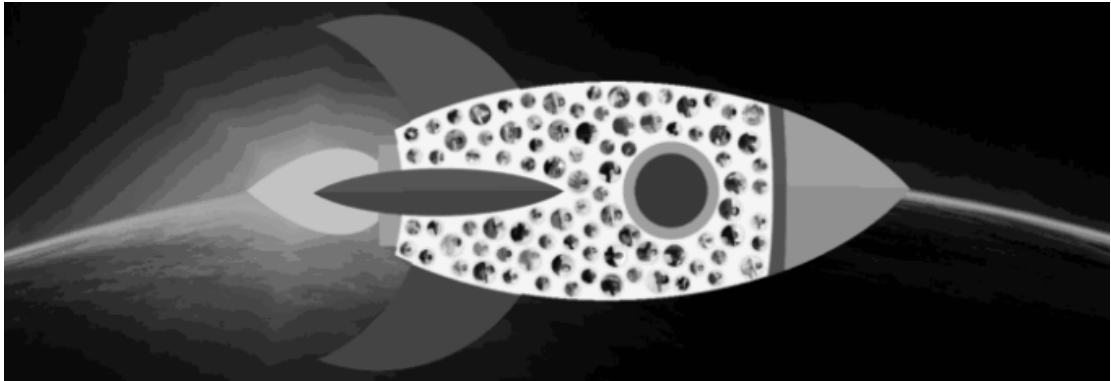
Customers can now benefit from new features and patches delivered to the market each month...

> ℹ️ For an overview of these new features and patches, see the Online Release Notes.

Planon as a Platform

What they say is really true: disruptive technological developments are accelerating, fuelling increasing demands for functionality.

Even though the Planon application is highly configurable, with its expanding customer base and global presence, the necessity to extend Planon Live has further increased.

By 'opening up' the Planon software and enabling customers and partners to create their own functionality (apps) on top of the Planon application, Planon is taking a step towards realizing the concept of 'Planon as a Platform'.

Goal

This concept implies that acknowledged partners and customers can build their own apps that extends the Planon application. It enables customers/partners to build what they need and potentially share this in a community of Planon users.

> ℹ️ Strict quality and technical requirements are in place to safeguard the application's operational processes.

Tools

Developing apps is done by using Planon's built-in AppBuilder (IDE) and the specific extensions that will enact with the Planon logic.

Solution centers

A solution center is a market-centric development unit within Planon that is responsible for configuring and maintaining a specific domain solution.

The Planon Accelerator already is a best-practice configuration aiming to optimize the software for a comprehensive implementation. However, because of the wide deployment options for the Planon software, we soon realized that one size does not fit all!

Planon has set up these solution centers, hubs of expertise, most knowledgeable about the market requirements and the Planon software:

- CRE & FM
- Smart workplace management
- Higher education
- Service providers
- Property management

What's New?

Each month, a new version of Planon Live is delivered.

Each new Planon Live version brings new features and bug fixes, and these are communicated in the Online Release Notes.

In addition, a short *What's on Live* video is created for each Planon solution, please check out the following links:

Planon Software Solutions For...

- Corporate Real Estate & Facility Managers
- Service providers
- Financial professionals

Online Release Notes

The Online Release Notes is Planon's online tool for providing insight into new or extended functionality available in the Planon application.

There are various ways in which you can use the Online Release Notes:

- By applying filtering, you can check which new features or patches have become available in a range of releases.

- You can check which new features will become available in Planon's next release.

- You can check which issues are not solved on the current market release.

> ℹ️ To always provide the latest information, the Online Release Notes are generated each day anew, which ensures that the latest data is collected and displayed. This is specifically important for the **Next releases**, **Customer ideas** and **Open issues** tabs (which is why these tabs display a date-time stamp).

Concepts

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

Hotfix

A fix on a Planon release that represents a critical issue for a customer that needs to be fixed as soon as possible.

Process

- A hotfix is identified by a specific release number (for example: 97.0.0.**2**, where the last digit indicates the number of hotfix issues for a specific release.)

- Typically, a hotfix is implemented on the master branch and on the customer's release version.

> ℹ️ Because of this, a fix is not always available on all versions.
>
> **Example**
>
> A hotfix is implemented on two releases: 97.0.0.2, L99. This information implies that a fix is available on:

Release	Fix available?
L96	No
97.0.0.1	No
97.0.0.2	**Yes**
L98	No
L99 (and later)	**Yes**

Hotfix numbering

In the previous example there are two hotfix releases: 97.0.0.1 and 97.0.0.2. These number are consequtive. Don't be alarmed if you seem to *miss* a hotfix number - for various reasons hotfixes that are started are not always delivered. Hence, the numbering is not necessarily consecutive.

Filtering on hotfixes

Improvement

Functionality that is built and available for the Planon application as of a specific release to fulfil a customer request/idea.

By definition, an improvement is an extension of existing functionality. In the Planon application, an improvement is registered as a **Customer Idea** (CI). An improvement is identified by this icon .

Customer ideas tab

Maintenance

This type identifies technical improvements for Planon, such as updating 3rd party components, performance improvements, technical improvements, and so on.

New feature

New functionality that is built and available for the Planon application as of a specific release onwards.

A new feature brings new functionality to the Planon software and is initiated by Planon to satisfy its product development plans. A new feature is identified by this icon New.

[Release Notes tab](#)

Patch

A fix for a software problem that was reported by a customer.

Typically, in Planon Live, software patches are fixed on a subsequent release of the Planon application.

Working with...

This section describes the various functions available.

Release Notes tab

The **Release notes** tab displays the information of new features / improvements and patches that are available in the Planon application.

On the **Release Notes** tab, customers can:

- Filter on a range of releases.
- Fine-tune these results by further filtering on a specific solution.
- Switch between New features and Patchlist (of actual Planon releases).

[New feature](#)

Next Releases tab

The **Release notes** tab displays the information of new features / improvements and patches that will become available in the next Planon release.

The items displayed on this tab will all become available in a subsequent release version, indicated in the **Version** column.

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important for the **Next releases**, **Customer ideas** and **Open issues** tabs (which is why these tabs display a date-time stamp).

Customer ideas tab

The **Customer ideas** tab displays a list of items that are planned to be implemented.

The items in this list represent ideas for improvement as suggested by customers.

Customer feedback is greatly valued by the Planon organization. To be absolutely transparent as to what the status of submitted ideas is, Planon is publishing this list in the Online Release Notes.

Submitting

Like a question or a problem, an idea can be registered as a ticket. Planon Support will initially assess the idea. It can then either be Accepted or Rejected.

Accepted

If an idea is an improvement that fits Planon's strategic policy, it will be accepted. It will be picked up within 6 months and delivery is within 3 months once the idea is started.

Even if it is a complex solution that requires significant effort, it will be accepted.

Valuable ideas that cannot be picked up within a reasonable time frame will be placed on a CSE backlog for future consideration.

Your idea will be part of the quarterly release plan and communicated this way.

Rejected

There can be multiple reasons why your idea cannot be accepted, based on software policy, product vision or feasibility reasons. In that case, the customer will be informed via a personalised message from the product manager in the ticket, along with an explanation.

Ready

When an idea is available in the next release, the customer will be informed via the ticket. All other Planon users can see the list of ideas in the release plan and in the (online) release notes.

> ℹ️ Ideas can still be removed from the list, for example, if the reasons for implementing an idea are overtaken by new developments.

Improvement

Open issues tab

The **Open issues** tab displays all *urgent* items still open on the current Planon release that is available in the market.

By listing these issues, Planon aims to be transparent to its customers. Should there be an issue in the list that is blocking, a customer may use this information and hold off an upgrade until the respective issue is fixed. When this is the case, the respective item will be displayed in the **Next release**/**Release Notes** tabs respectively.

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Filtering in the online release notes

In the online release notes, there are various ways in which you can apply filtering:

You can:

- filter on solutions
- filter on products
- filter by sorting
- filter by searching
- filter by making a selection

Filtering by making a selection

There are various controls that you can use in order to limit the result list.

You can filter on

- **New Features** introduced in a range of product versions.
- **Patches** fixed in a range of product versions.
- For new features or patches available in the **Next releases**.

> ℹ️ Whichever selection you make in the **Release notes** or **Next releases** tabs, the selection criteria will be appended to the URL so that you can share or save your selection by copying the URL!

Filtering on solutions

If you would like to find out which features/patches have been implemented for a specific solution during a certain time frame, you can easily filter on **Versions** and **Solution**.

Filtering can give quick access to items that are important to customers.
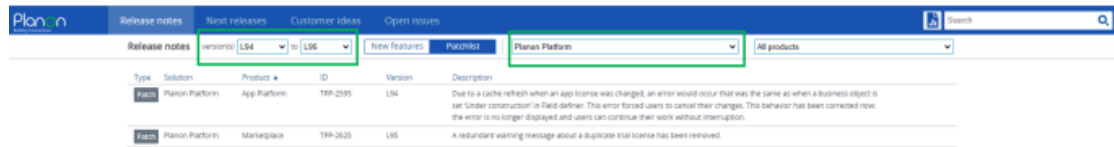
Procedure

1. In the toolbar, fill out the **Versions** to define the search scope.

2. In the **Solutions** box, select the solution you want to filter on:

Solution	Description
Generic	Enables you to filter on functionality that is available across solutions.
Planon Platform	This solution is of interest for customers who engage in building apps extensions to the Planon Universe platform, using the built-in IDE and API.
Cloud	This solution is of interest for customers who are running their Planon software as a Cloud solution. By filtering on Cloud, customers will find out more about fixes and enhancements related to managing their technical infrastructure.

Planon Integrated Workplace Management Solution

The Integrated Workplace Management Solution focuses on providing functionality for optimizing workplace maintenance, from the perspective of the property owner as well as of the user.

CRE	Corporate Real Estate, functionality that deals with managing: • Finances • Properties
AMM	Asset & Maintenance Management, functionality that deals with: • Registering assets • Planning resources • Creating maintenance plans/activities • Mobile access (AppSuite)

Solution	Description
SWM	Space and Workplace Management, functionality that deals with: • Registering spaces - and viewing space details (2D, 3D) • Space related functionality (sensors, moves, etc.)
ISM	Integrated Service Management, functionality that deals with: • Registering orders, reservations, visitors, personnel related to spaces
SUS	Sustainability, functionality that deals with monitoring your real estate regarding sustainability goals.

Planon Facility Services Business Solution

Enables Service Providers to achieve operational efficiency by using Planon Universe tools and processes in four key areas for service offering: planning, execution, monitoring and billing.

CUS	Customers, functionality that deals with managing your customer base.
OCC	Operations Command Center, functionality that deals with: • Creating maintenance plans/activities • Planning resources • Managing finances
PMFS	Planon Mobile Field Services, functionality that combines: • Executing mobile orders • Administrative processing of orders • Financial handling of orders
Revenue optimization	Functionality for managing (customer/subcontractor) financials

Planon Lease Accounting Solution

Provides a compliant lease management and accounting process for property and asset lease contracts.

Onboarding	Functionality that deals with importing lease data
Lease Administration	Functionality to manage lease contracts, relevant data, renewals, indexations and new disclosures in a standardized SOX compliant solution

Solution	Description
FASB & IASB	Functionality that ensures compliant financial calculations and reporting
ERP integration	Functionality to export postings to any ERP or accounting system, leading to journal entries in your company's general ledger(s)
360 Degree	Functionality to combine lease accounting and other processes to enable strategic decision making
Planon Editions	
Customized solutions designed to provide smart workplace functionality.	
Essentials Edition	Functionality developed for the Essentials Edition Solution.
Workplace Edition	Functionality developed for the Workplace Edition Solution.

> **i** The order of steps 1-2 can also be reversed (2-1).

The relevant items are displayed.

Filtering on products

If you would like to find out which features/patches have been implemented for a specific product during a certain time frame, you can easily filter on **Versions** and **Products**.

Procedure

1. In the toolbar, fill out the **Versions** to define the search scope.
2. In the **Products** box, select the product for which you want to see a list of new features or patches.
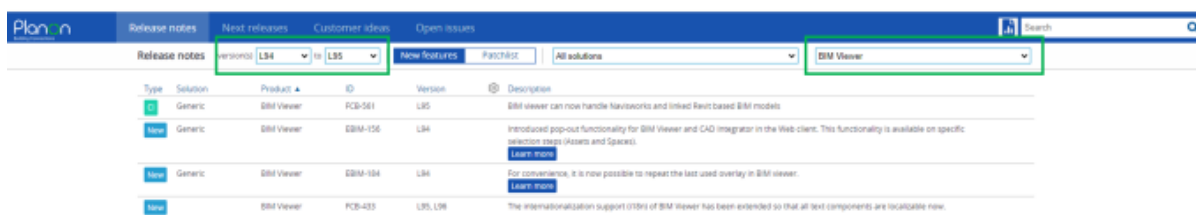
The search query will be executed and the search results will be displayed.

If you click another tab, the same query will be applied.

Filtering on hotfixes
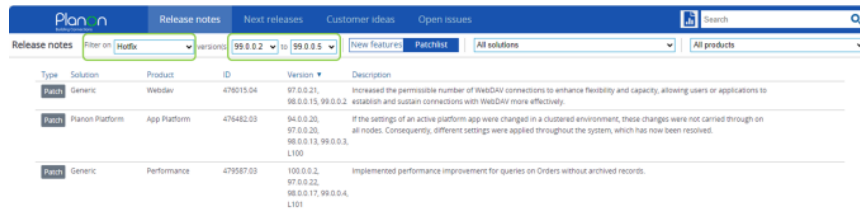
If you are looking for information about a specific hotfix number, you could use the Search box to find it.

You can, however, also use the available filtering options to find the relevant information.

<p style="color: teal">P r o c e d u r e</p>

1. To get a list of released hotfix items, click the **Patchlist** tab.
2. On this tab, you can **Filter on** > **Hotfix**.

The filter only contains hotfixes and no regular releases.

3. Specify the range of hotfixes to filter on and find the information you are looking for.

The list of hotfixes is displayed.

You can further amend the list by sorting on Type, Solution, Product or Version.

If you would like to share the list of hotfixes you have filtered on, simply copy and share the URL (including the filter).

Hotfix

Sorting

If you have a large set of data, it may be useful to sort on a specific attribute.

Sorting (ascending/descending) is available on the following columns (if available on the tab):

- Type
- Solution
- Product
- Version

Search

If you want to find out if a specific item is listed in the Online Release Notes, you can always use the **Search** function at the top.

The **Search** is a powerful function and works across all tabs simultaneously.

> ℹ it searches for the exact search criteria that you enter in the **Search** box (case insensitive).

Translating the Online Release Notes

The Online Release Notes is only available in the English language. Customers who wish to view these in another language can try using Google Translate.

This topic describes how to add Google Translate to your browser. Google Translate is very powerful translation tool and it is available for free.

> ℹ Google Translate only works in the Google Chrome browser.

1. Open the link in Chrome: Chrome web store, or go to the Chrome web store and search for Google Translate.

2. Click Add to Chrome.

   The ▣ Google Translate icon appears next to the address bar in Chrome.

3. Go to the Planon Online Release Notes and click the Google Translate icon next to the address bar.

   This dialog box appears:
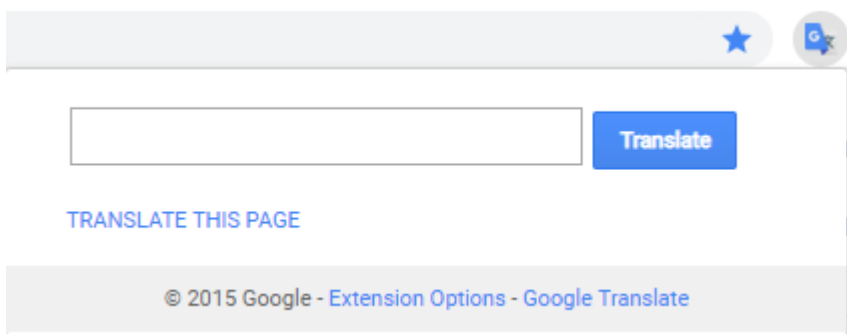
4. Click Translate this page.

   The Google Translate bar appears in your browser.

5. Select the language in which you want to translate the web page.

The Online Release Notes appear in the selected language. The text is dynamically translated while scrolling through Release Notes / Patchlist / Open Issues.

> ℹ️ Although the quality of translation is good, it is possible that the target translation deviates from the original.

Exporting to Excel

It is possible to create filters and by doing so display a selection of data in the release notes.

Customers who require a more customized solution, can export the data and use extensive filtering in Excel.

Procedure

1. Open the release notes and click the **Save as Excel** button left of the **Search** field.

The Excel list is saved to your browser's download location.

> ℹ️ • This is an unformatted list of data.
> • The export includes all current data (of all tabs).

2. For improved usability, we recommend manipulating the sheet (adding filtering options, headers, etc.).

This allows you to configure the data to your own liking.

Alternatively, in addition to using the exporting all data to Excel, you can also use another option that is available in the filtering bar:
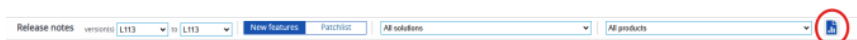
This option will enable you to export the selection that is visible on your screen to Excel (so it will contain only a subset of all data). It will not allow you to select multiple solutions or products in one go, but it will allow you to export a specific set of data.

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