



# Online Release Notes

## Planon Software Suite

Version: L104

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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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# Introduction

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

## Some facts...

Planon is a software company working in the realm of real estate and facility management. As a company, Planon has grown steadily from a local vendor 35 years ago, to an acknowledged global leader in the global IWMS software market.



The Planon company is headquartered in the Netherlands and has offices [across the globe](#).

Planon has a 1000+ employees and more than 2,500 customers in 40 countries.



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

## What we do

As a software company, Planon builds and provides software solutions for its customers.

More specifically, Planon's Integrated Workplace Management Solution (IWMS) helps organizations optimize the use of workplace resources, including the management of a company's real estate portfolio, infrastructure and facilities assets.

In short, most of what we do is related to (real estate) properties and facility management processes.



For more information about what an IWMS is and does, watch this [short \(2:31\) video on Youtube](#) .

## 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.

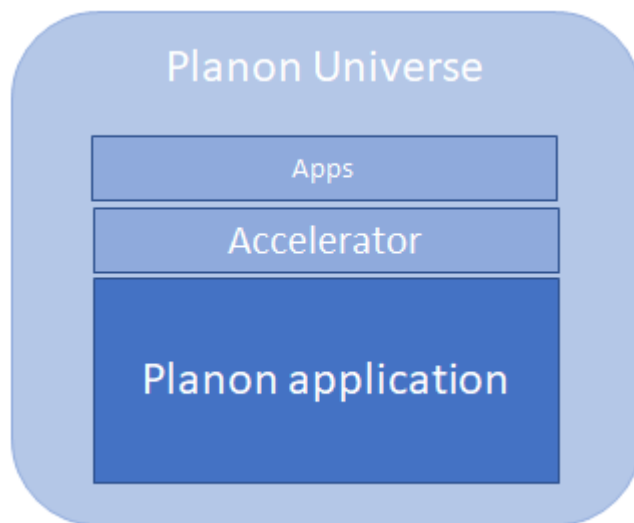
Innovation is a core value and the driving force of the Planon software.

## 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:

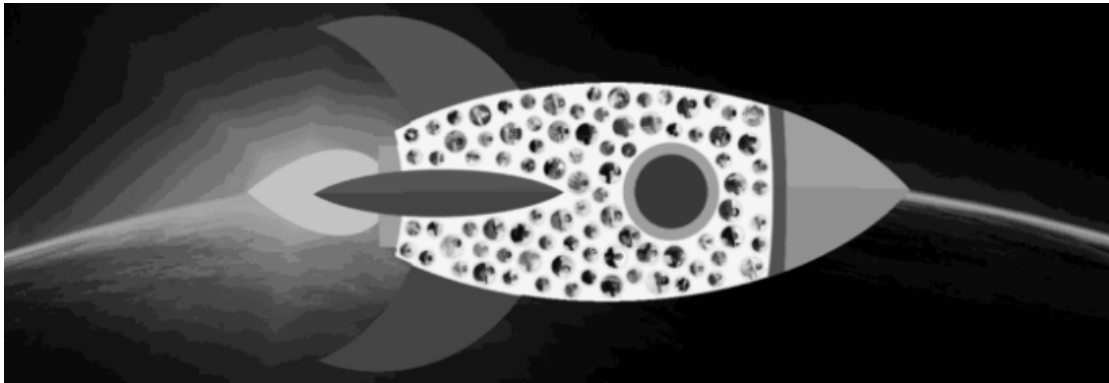
- Customers could prepare for upgrades
- Planon could develop and test comprehensive solutions

### **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 do 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...



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 extend the Planon application. It enables customers/partners to build what they need and potentially share this in a community of Planon users.



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.

 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.

 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	<b>Yes</b>
L98	No
L99 (and later)	<b>Yes</b>


## Hotfix numbering

In the previous example there are two hotfix releases: 97.0.0.1 and 97.0.0.2. These numbers are consecutive. 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](#)

## 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 .

## 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.



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).

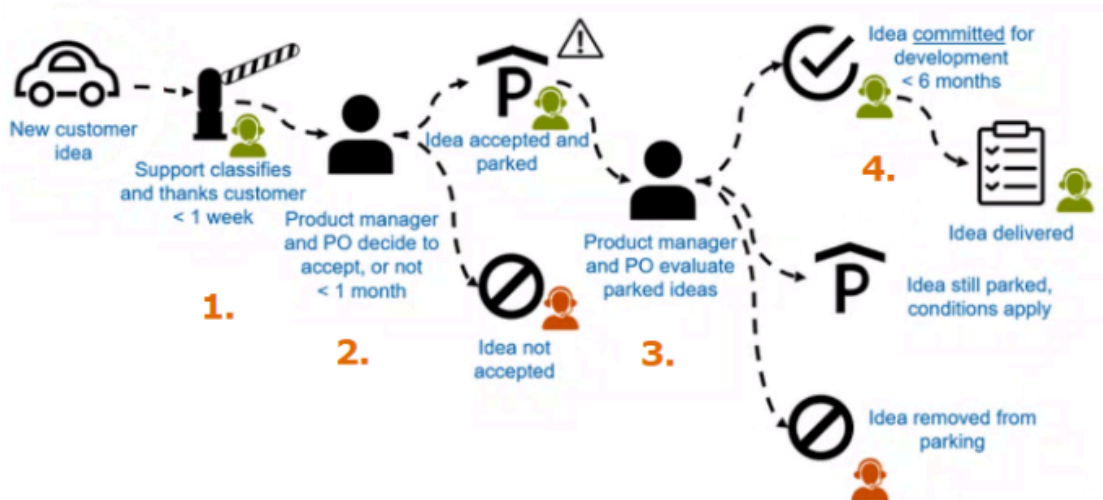
### Customer ideas tab

The **Customer ideas** tab displays a list of items that are yet 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.

## Process



1. Once an idea is submitted by a customer, Planon Support will route it for assessment to the relevant product owner/product manager.
2. Within a month, the idea is either *approved* or *rejected* (this will be communicated with the customer directly).
3. Each quarter, the list is prioritized to ensure that the most value-adding ideas will be implemented first.
4. When an idea is picked from this list, the relevant team has 6 months to implement it. These ideas are then published in the Online Release Notes > **Customer ideas** tab.

The **due date** displayed on this tab lists the date by when this feature is committed to be delivered at the latest.

**i** 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.

**i** 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).

## 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**.

**i** 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.



The screenshot shows the Planon online release notes interface. At the top, there are tabs for 'Release notes', 'Next releases', 'Customer ideas', and 'Open issues'. Below the tabs, there are several filtering controls: 'Release notes' (selected), 'versions (L34)' (dropdown), 'to (L36)' (dropdown), 'New features' (checkbox), 'Patches' (checkbox), 'Planon Platform' (dropdown), and 'All products' (dropdown). Below these controls is a table with columns for 'Type', 'Solution', 'Product', 'ID', 'Version', and 'Description'. The table contains two rows of data.

Type	Solution	Product	ID	Version	Description
patch	Planon Platform	App Platform	TR9-2385	L34	Due to a cache refresh when an app license was changed, an error would occur that was the same as when a business object is set under construction in Field define. This error forced users to cancel their changes. This behavior has been corrected now, the error is no longer displayed and users can continue their work without interruption.
patch	Planon Platform	Marketplace	TR9-2625	L35	A redundant warning message about a duplicate trial license has been removed.

## 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:

---

<b>Solution</b>	<b>Description</b>
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: <ul style="list-style-type: none"> <li>• Finances</li> <li>• Properties</li> </ul>
AMM	Asset & Maintenance Management, functionality that deals with: <ul style="list-style-type: none"> <li>• Registering assets</li> <li>• Planning resources</li> <li>• Creating maintenance plans/activities</li> <li>• Mobile access (AppSuite)</li> </ul>
SWM	Space and Workplace Management, functionality that deals with: <ul style="list-style-type: none"> <li>• Registering spaces - and viewing space details (2D, 3D)</li> <li>• Space related functionality (sensors, moves, etc.)</li> </ul>
ISM	Integrated Service Management, functionality that deals with: <ul style="list-style-type: none"> <li>• Registering orders, reservations, visitors, personnel related to spaces</li> </ul>



<b>Solution</b>	<b>Description</b>
SUS	Sustainability, functionality that deals with monitoring your real estate regarding sustainability goals.
<b>Planon Facility Services Business Solution</b>	
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: <ul style="list-style-type: none"> <li>• Creating maintenance plans/activities</li> <li>• Planning resources</li> <li>• Managing finances</li> </ul>
PMFS	Planon Mobile Field Services, functionality that combines: <ul style="list-style-type: none"> <li>• Executing mobile orders</li> <li>• Administrative processing of orders</li> <li>• Financial handling of orders</li> </ul>
Revenue optimization	Functionality for managing (customer/subcontractor) financials
<b>Planon Lease Accounting Solution</b>	
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
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
<b>Planon Editions</b>	
Customized solutions designed to provide smart workplace functionality.	

Solution	Description
Essentials Edition	Functionality developed for the Essentials Edition Solution.
Workplace Edition	Functionality developed for the Workplace Edition Solution.

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

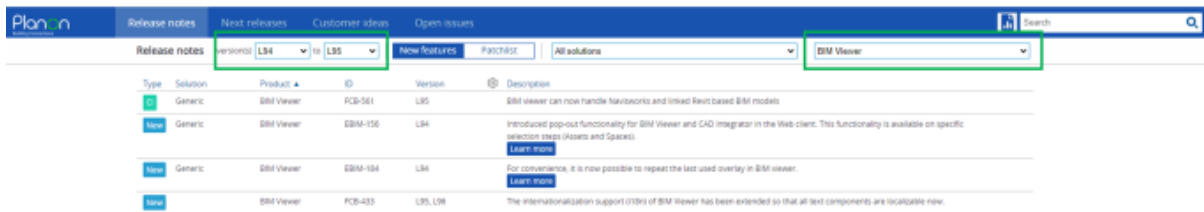
The relevant items are displayed.

## 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.

### Procedure

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.

Type	Solution	Product	ID	Version	Description
Hotfix	Generic	WebDAV	476015.04	97.0.0.21, 98.0.0.15, 99.0.0.2	Increased the permissible number of WebDAV connections to enhance flexibility and capacity, allowing users or applications to establish and sustain connections with WebDAV more effectively.
Hotfix	Hybris Platform	App Platform	476482.03	94.0.0.20, 97.0.0.20, 98.0.0.13, 99.0.0.3 L100	If the settings of an active platform app were changed in a clustered environment, these changes were not carried through on all nodes. Consequently, different settings were applied throughout the system, which has now been resolved.
Hotfix	Generic	Performance	479587.03	100.0.0.2, 97.0.0.22, 98.0.0.17, 99.0.0.4 L101	Implemented performance improvement for queries on Orders without archived records.

- 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.



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

'property' field	property field
<p>Description</p> <p>Previously, the 'Property' field was made mandatory. However, this caused issues with multiple assets, the 'Property' field remains mandatory.</p> <p>The 'Property' field is now displayed in the console.</p>	<p>Description</p>

## 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 a very powerful translation tool and it is available for free.

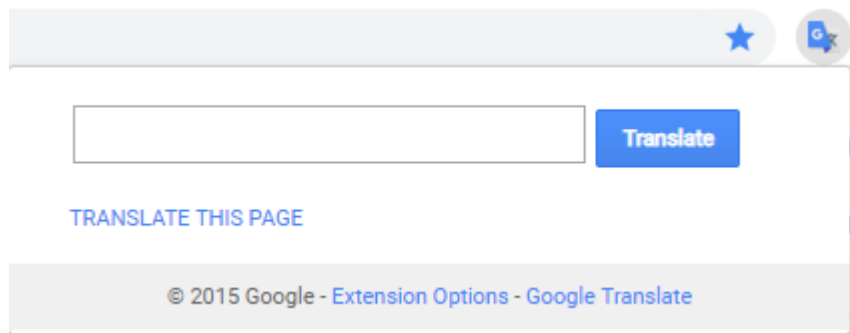
 Google Translate only works in the Google Chrome browser.

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.

 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.

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

2. For improved usability, we recommend to manipulate the sheet (using filtering options, headers, etc.).

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

releaseNotesItemTy	domains	fixedInVersio	config	description	dueDate	issueType
released	Cloud	L82	No	The Environment management gadget maintenance message now explicitly mentions that you can continue working in the Planon application. For more information about Cloud maintenance (updated), see the WebHelp:	2022-11-01	Improvement
released	Cloud	L64, L65, L66, L1	No	IP Whitelisting is improved to limit access to Keycloak too. The same IP list is used as for the Planon application. If you use IP Whitelisting and Keycloak, verify your own IP address is	2022-06-01	Improvement
released	Cloud	L86	Yes	It is possible to configure your own error page in the Cloud environment. This page will be displayed when the application is unavailable, due to an upgrade, restore action and so on.	2022-11-09	Improvement
released	Cloud	L75	No	On the custom error page you can inform your users that Planon is down and add extra In the Cloud gadget you can now upload Welcome images up to 5 MB in size.	2022-04-01	Improvement

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