



Planon app - Assets module

Planon Software Suite

Version: L126

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About this Document

Intended Audience

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

Contacting us

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

Document Conventions

Bold

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

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols


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

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About the Assets app module

General information

The **Assets** app module can be used within the **Planon app > PMFS solution**. The Planon app is the 'shell' application that you can download from the relevant app store. It can hold various *licensed* apps / app modules, for example for fields services (PMFS). The PMFS-related modules include: **Work assignments**, **Mobile observations**, the **Mobile Condition Assessor** and **Assets**.

The **Assets** app module is licensed under the *Planon Mobile Asset Manager* license. For the back-office operations, it connects to **Assets** in *Planon ProCenter*.



- Like all Planon app modules, the **Assets** module is configurable, through web definitions. This means that names, labels, etc. used in this user documentation may differ from what you see in your app.
- For more information on adding and configuring licensed app modules in the Planon app, see [About Planon app - mobile configuration](#).

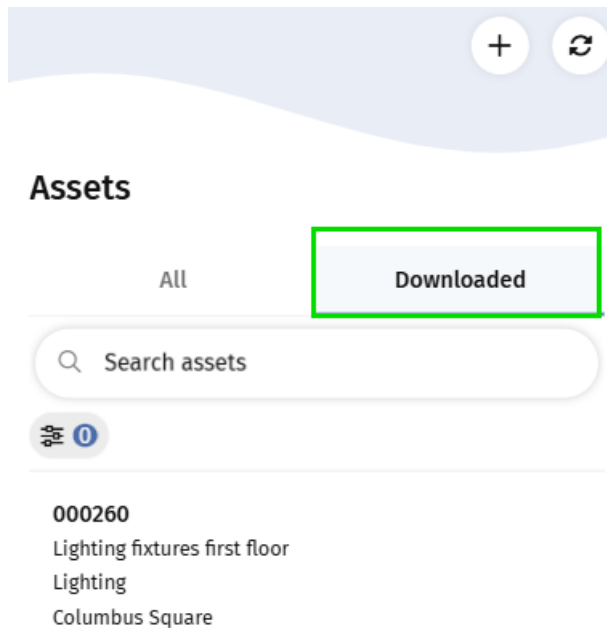
Offline capabilities

If you work with the **Planon app > PMFS solution > Work assignments** module, you have the option to temporarily work offline, via the app's [mobile envelopes](#) and messaging technology.

Since asset maintenance is a key part of many work assignments, the mobile **Assets** module also supports working offline in the **Work assignments** module. When configured, you will have a **Download asset** action available in **Work assignments**, to download the latest asset information on your mobile device before going offline.

You can even *edit* the downloaded asset data and asset attributes on your app. When you are online again, any edited data is synchronized with the back-office via the mobile envelopes technology. See [Downloading assets for offline use](#) for more information.

In the **Assets** module you will see an additional **Downloaded** tab on the **Assets** landing page.



The **Download** tab in the **Assets** module lists all downloaded assets. The download labels indicate the asset's download status real-time: **New** / **Download queued** / **Downloading** / **Downloaded**.

i If you log in and previously downloaded assets exist, these are displayed as **New**. If you have triggered downloading assets from the **Work assignments** module, and this is interrupted (for example your internet connection is lost, or the app is moved to the background), the label will be **Download queued**. If assets are already downloading, the label is **Downloading** and when completed, it will be **Downloaded**.

Refresh button

When you are online, you can use the **Refresh** button at the top of the **Landing** page to update the page with the latest changes. 'Toast messages' will also notify you when a page refresh is recommended.

Synchronize button for offline messaging

To make sure that offline messages are correctly sent and received once your internet connection is restored, you can use the '**Unsynchronized messages**' button at the top of the **Landing page**. Your Planon administrator can add this button to the landing page layout.

Selecting this button triggers message synchronization between the app and the back-office. If you activate the synchronization, a bottom sheet will show if there are

any unsynchronized messages and inform you about the synchronization's progress (statuses: Pending, Synchronizing, Complete).

Stand-alone use

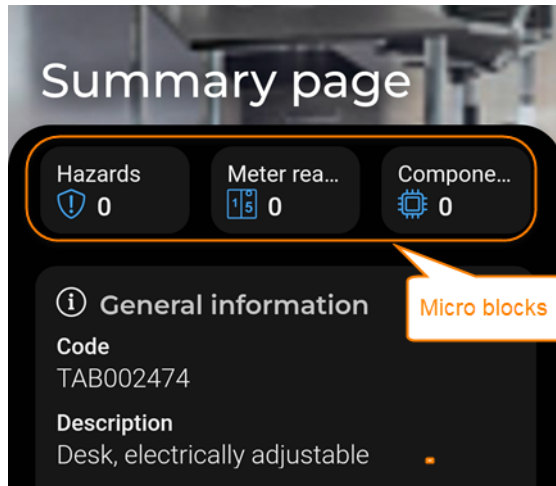
Customers who do not require extensive PMFS features can use the *online* features of the **Assets** app module to scan, assess and update their FM assets, or add new assets. 'Stand-alone' use is especially convenient for FM surveyors (or staff with similar responsibilities) who want to inspect a building's FM assets and report minor maintenance issues.

Features of the Assets module

- **Search bar** to search the assets database for existing assets, their locations and their details.
- **Add asset** and **Add subasset** buttons, to create new assets and subassets from scratch, or based on a 'template asset' from the asset library.
- **Edit button** on asset details to allow for updating of asset information by app users.
- **Scan QR code** button, to find an asset in the database.
- **Filters**, configurable filter criteria and quick filters.
- **Service request** button to report minor maintenance issues on assets.
- **Summary page** with various blocks that include different types of asset information and additional details pages, such as:
 - **Attributes** - shows the attribute set with the attributes that are linked to the selected asset.
 - **Asset location** - details about the property and space where the asset is located. This feature is not available for building elements.
 - **Communication logs** - documents / images that are communicated between you and the back-office.
 - **Hazards** - health and safety related information about the asset.
 - **Orders** - service requests / work orders related to the asset
 - **Meters** - meters linked to the asset
 - **BIM** - link to BIM (Building Information Modeling), to open 3-D drawings of the asset.
 - **Asset components** - the various parts of which a single asset consists.
 - **Observations** - shows the observations that are registered for the selected asset.
 - **Conditions** - the option to add new condition scores for an asset on a details page.



Which blocks are displayed on the **Summary** page depends on your configuration. Some blocks may be available as micro blocks at the top of the summary page for quick and easy access.



Working with the Planon app - Assets module

This section describes the various functions available for the Planon app **Assets** app module.

Searching assets in the Planon app Assets module

You can find assets using the search bar, by typing search terms or parts of search terms.

Procedure

1. Open the Planon app > Assets.

As names of the app modules are configurable, Assets can have a different name in your app.

2. Type (part of) a search term in the search bar and confirm via you keypad.

Example: if you are looking for a desk, enter (part of) the description: *desk*. Or - if you know it, (part of) the code: *000547*.



If you confirm the search in an empty search bar, you will get a list with all assets.

3. Select the relevant asset from the list of results, to view more details on the Summary page.

Using quick filters on the search bar and viewing asset details

You can refine your queries in the search bar by using the available quick filter options.

Procedure

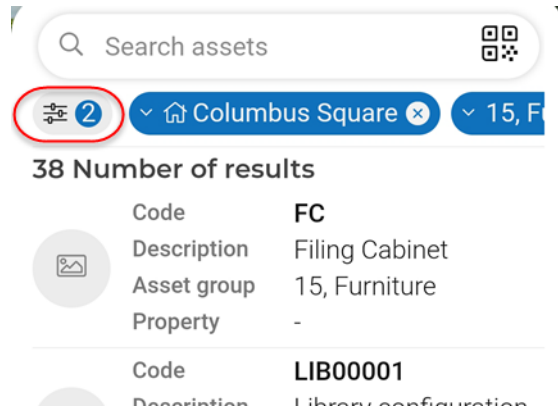
1. Open the Planon Live app > Assets module.



As names of the app modules are configurable, **Assets** can have a different in your app.

2. You can activate a quick filter and apply it to your query by tapping the Select filters icon, selecting relevant criteria on the Filters page and tapping Apply.

Active quick filters are highlighted in a contrasting color. The Filter icon shows the number of active quick filters. Tap the drop-down symbol (v) on a quick filter to open the list of filters. Deactivate the quick filter by tapping the cross. Scroll from left to right to see all quick filters.



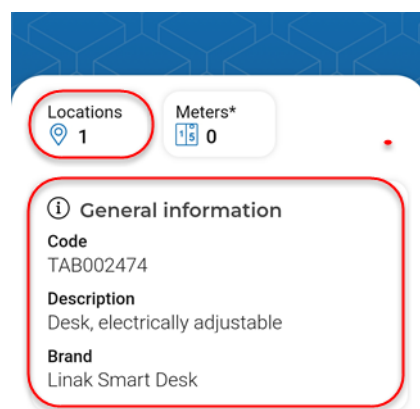
- From the list of results, select an asset directly to view its details,

or if the list is too long ...

- ... adjust your filter(s) and / or edit your search term and tap the search icon on your keyboard again.
- Select an asset to view its details.

On the asset's Summary page you can tap a block, for example General information or a micro block, for example Locations, to navigate to a page where you can view or edit specific asset details.

i Some asset details, such as **Hazards**, **Orders**, **Components**, **Locations** or **Meters**, are either accessible via a regular block or via a micro block. This depends on your app's configuration.



Searching an asset by QR code

You can search the database for assets by scanning the QR code of a physical asset.

Procedure

1. Open the Planon Live app > Assets.
2. Tap the QR code scanner in the search bar.
3. Scan the asset's QR code.

If the asset exists in the database, it is now listed on the app.

4. Tap the asset to view the asset information.

If no results were found, the asset probably does not exist in the database or it may not have been registered properly. In that case, you may want to add it. See [Adding an asset](#)

Adding an asset

You can add a new asset to the database. You can do this 'from scratch' and fill in all data yourself, or based on an asset from the asset library, in which case most asset data is auto-populated.

Procedure

1. Open the Planon Live app > Assets.
2. Tap the plus icon at the top of the screen.
3. Select Add new to add a new asset from scratch, or ...
4. ... select Add from library to add a new asset based on a template (standard asset).
5. Select the type of asset you want to create. The options available depend on your configuration.
6. If you selected Add new, enter the relevant data on the form.

1. Asset fields

Field	Description
Code	The asset code is auto-generated, but it can be edited manually. Codes must be unique. If available in your app configuration, you can also scan the asset's QR code here.
Description	Enter a relevant description of the asset.
Asset tag	Enter the asset tag code or scan the asset's QR code by activating the scanner in this field.

Field	Description
Asset group	Tap the > sign to select an asset group from the list. Use the filter options as required.
Asset classification	Tap the > sign to select an asset classification from the list. Use the filter options as required.
Photo	Tap in this field to add an image of the asset. Either take a photo or upload one from your photo library.
Brand	Enter the asset's brand.
Model / type	Enter the model / type of the asset.
Property	By default your current location is filled in. Select a different building if the asset is not located in the default location.
Space	Select the space where the asset is located.
Comment	Enter a comment on the new asset if required.

7. Tap Submit.
8. If you selected Add from library, type a search term in the search bar to find the relevant standard asset.
9. Select the standard asset.
10. On the form, select / deselect the relevant settings to include related Subassets, Standard service plans and Defects lists from the library.
11. Fill in the other asset data fields (see table above).
12. Tap Submit.

The app confirms that the asset has been created.

Adding a subasset

You can add a new subasset to an existing asset.

Procedure

1. Open the Planon Live app > Assets.
2. Select the asset to which you want to add a subasset.

The Summary page opens.

3. Tap the plus sign at the top of the screen
4. At Add new subasset, select the type of subasset you want to add.
5. Enter the relevant data on the form.

Field	Description
Code	The subasset code is auto-generated, but it can be edited manually. Codes must be unique.
Description	Enter a relevant description of the subasset.
Asset group	Tap the > sign to select an asset group from the list. Use the filter options as required.
Asset classification	Tap the > sign to select an asset classification from the list. Use the filter options as required.
Asset tag	Enter the asset tag code or scan the subasset's QR code by activating the scanner in this field.
Photo	Tap in this field to add an image of the subasset. Either take a photo or upload one from your photo library.
Brand	Enter the subasset's brand.
Model / type	Enter the model / type of the subasset.
Property	By default you current location is filled in. Select a different building if the subasset is not located in the default location.
Space	Select the space where the subasset is located.
Comment	Enter a comment on the new subasset if required.

6. Tap Submit.

The app confirms that the subasset has been created.

Editing general asset details

If editing is allowed by the administrator settings, you can edit asset details on the app.

Procedure

1. Open the Planon Live app > Assets.
2. Use the search bar to find the asset you want to edit.
3. Select the asset.
4. On the Summary page, tap the General information block.
5. On the Asset details page, tap the pencil icon at the top right corner.
6. Tap the field you want to edit.

Example: tap the Photo field to update the asset's image.

7. Edit a selected field by typing new free text, or if free text is not applicable ...
8. ... select a new record or file from the list or library to which you are directed.

In case of replacing an image, you might also want to navigate to the device camera to take a new photo.

9. When you are done editing fields, tap Submit.

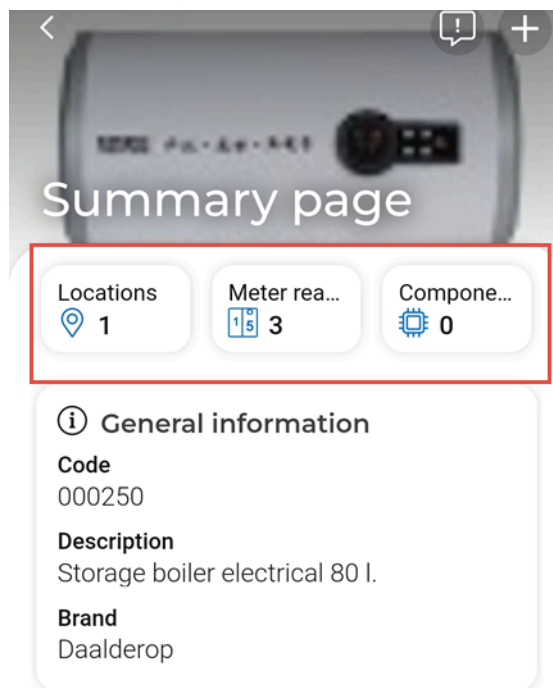
The app confirms that the edited asset data is saved.

Viewing, editing or adding asset details via the Summary page

On the **Summary** page you can select the individual blocks such as **General information**, **Locations**, **Observations**, **Hazards**, **Meters**, **Components**, **Communication logs**, **Orders**, **Attributes** or **BIM** to view, add or edit further asset details.



Some of these blocks might be available at the top of the page as micro blocks. This depends on your app configuration.



Procedure

1. Select the asset's Summary page.

2. Select the (micro) block for which you want to view, add or edit asset details.

Depending on your configuration you may have the following options:

General block - allows you to view and edit asset details, like the asset's condition score.

Asset locations block - allows you to view the available location(s) for the selected asset.

Attributes block - allows you to view any attributes linked to the asset / building element.

Meters block - allows you to view asset related meters (counter and gauges) and add meter readings.

Hazards block - allows you to view the potential hazards that are related to the selected asset.

Components - allows you to view the components the asset consists of.

Communication logs block - allows you to view the asset related communication.

Observations block - allows you to view the existing observations related to the asset.

Orders block - allows you to view the orders related to the asset.

BIM block - allows you to view the asset in a 3-D BIM model.

After you select a (micro) block, you are directed to the relevant details page. Depending on the selected block, you can view, edit or add new data.

Viewing and editing asset attributes

If an asset attribute set is linked to a selected asset, and if your app configuration allows, you can view the linked attributes, and edit them while you are online.

Procedure

1. Open the Planon app > Assets.
2. Select the relevant asset.
3. Tap the **Attributes** (micro) block and select the relevant attribute set.

You are directed to the Attribute set details page.

4. In case any edits are required, tap the **Edit attributes** button at the bottom of the page to start editing the attributes.

You are directed to the Edit attributes details page.

5. Select the attribute(s) you want to edit and type your edited text in the related text box.
6. When you are done editing, tap **Submit**.

Your edits are saved and sent to the back-office.

Adding an observation

In case you come across anything remarkable or noteworthy while working on an asset, you have the option to add an observation. This new observation will be sent to the back-office along with the other asset data.

Procedure

1. Open the Planon app > Assets.
2. Select the asset to which you want to add an observation.

The Summary page opens.

3. Tap the **Observations** (micro) block.

You are directed to the Observations details page, where any existing observations are listed.

4. Tap the **Add observation** button at the bottom of the page to add a *new* observation.

You are directed to the Select standard observation page.

5. Tap the relevant standard observation.

If the list is long, use the search bar to find the appropriate standard observation.

6. On the **Add observation page** fill in / select the relevant information, such as **Priority**, **Observation group**, **Description**, **Start date-time** and **Comment**.
7. Tap **Submit**.

The observation is sent to the back-office.

Adding a service request for an asset

If you notice that an asset needs minor maintenance or another type of care / attention, you can submit a service request.

Procedure

1. Open the Planon Live app > Assets.
2. Select the asset for which you want to add a service request.

The Summary page opens.

3. Click the service request icon at the top of your screen.



4. Select the type of service request you want to add.
5. On the form enter the required data:

Field	Description
Created by	This field is auto-populated with your name.
Property	This field displays your current location. You can edit this as required, by selecting a different building from the list.
Space	Select the space where the asset is located.
Asset	This field displays the selected asset.
Additional information	Enter additional details on the asset, as required.
Comment	Enter a comment about the service request.
Photo(s)	Click the Add photo icon to either take a photo with your phone's camera or upload a gallery photo.

6. Tap Submit.

The app confirms that the service request for the asset is saved.

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