



# Planon app - Mobile configuration

Planon Software Suite

Version: L107

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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 Planon app - mobile configuration

**App configuration** provides a mobile configuration framework that enables application managers to configure Planon mobile apps, for example because they need to respond to configuration changes in the back-office or handle authorization issues.

The **App configuration** TSI enables you to manage and configure two types of app content:

- Planon-created content (licensed app modules)
- Partner-created content

## Planon-created content

Planon-created app modules are licensed per 'named' solution license.

Currently the following Planon app modules are available:

- Planon Workplace app featuring the **Bookings, Reservations, Colleagues, My inventory, Spaces, Requests, Visitors** modules.
- PMFS Live app featuring the **Work assignments, Materials** and the **Assets** modules.
- Planon Live - Mobile Condition Assessor app
- Planon Live - Mobile Assessment Survey app
- Planon Live - Mobile Observations app
- **Assets** module as stand-alone

Users can use a licensed module if:

- their user group is linked to the *product definition* of the correct product.
- their user group is linked to the *web definition* (casepart) of that module.



The ready-to-use modules can be further configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the delivered web definitions and hardly do any configuration, or create a fully customized app. If the configuration of any of the app's modules is updated in Planon ProCenter, app users will have to log off and log on again to see these updates.

## Planon Live app - SSO support

Does the app support SSO?

### Cloud

The Planon Live mobile app only supports **SAML** SSO, which is available on Cloud. If a customer uses **SAML** SSO, this is also applied on the app and that works like other apps on your device authenticated with SSO.

### On premise

There is no standard Planon SSO option available. The on premise SSO options supported by Planon (Waffle/Spnego) all require a **Windows** SSO, which mobile devices do not have. If an on premise customer has SSO configured, they should add a separate tomcat server to allow for a user name/password login on the **Planon Live** app.

It is possible for a customer to use **SAML** SSO on premise, but that is a custom implementation, and is not supported by Planon 'out of the box'. For more information please contact Planon Support (ICC).



Waffle SSO is not supported, since the device is not part of the domain.

## Planon Live App access keys (login methods)

The **Planon Live app** supports two ways of signing in:

- via the regular Planon login
- via an identity provider (SSO)

If you choose the second method, of logging in through an identity provider, the app cannot store the user credentials. As a result, users may have to log in frequently, for example after closing the app, or after session time-outs. This is not very convenient for them.

You can make this login process smoother, by having access keys generated for the app users after they sign in into the **Planon Live app**. An access key is a unique key that will be stored on the device and sent along with every request the app sends to the server. That way, users will only have to sign in once and they will have smooth access to the app for the duration of the access key's lifespan. This is a setting in the **Security** TSI.

You can enable this functionality by going to System settings > Security > Key pairs tab and selecting **Yes** in the **Auto-key generation enabled?** field. You can use the setting **Auto-key lifespan (in days)** to set a timespan during which the key will be valid. After the set number of days have passed, the existing key becomes invalid and app users will have to sign in once to start a new access key lifespan.



In the **Planon Live app**, an access key works for the duration of the selected lifespan. So keep in mind that if a person leaves the company, the only way to revoke access while the key is still valid, is to *completely block the user from Planon*. Just removing this person's access from the identity provider is not sufficient in this case.

## Planon app - supported languages

The Planon app supports the same languages as the Planon ProCenter web client. See [Supported Configurations > Languages](#) for an overview of the languages that are currently supported for Planon's core products, including the Planon app.



If you add a new, 'unsupported' language as default language for the app's user group(s), the Planon app will display the selected language, but it will apply English UK 'locale' settings to the date-time format.

### Good to know

By design, Planon mobile apps include a significant number of customized translations. These can only be added and updated in the respective web definitions in Planon ProCenter . Currently, there is no export-import functionality for the mobile apps to support translations.

# Concepts

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

## General settings

**App configuration** for the **Planon Live app** comes with a **Start page** module that includes the general settings of the app. In the associated **Mobile start page** web definition you can make settings on various tabs that apply to the whole app, such as branding colors.

The various pages and blocks enable you to make settings for the user profile and personal details that can be shown on the app or for allowing tailor-made cards (TMS cards) on the app.

## Native components

Native components are functional components that part of your phone's operating system. The **Planon Live app** includes several non-configurable native Cordova components:

- Barcode scanner



refer to [Supported barcodes in Planon Live app](#) for the supported bar code types.

- Camera
- Device information
- File access
- File opener
- File transfer
- Hot code push
- Native storage
- QR code scanning / NFC (see: [Code scanning in the Planon Live app](#)).
- Secure storage
- Splash screen
- SQL storage
- Webview / in-app browser
- Whitelist

# Deep link URLs in the Planon app

## Onboarding app users

You can onboard users to the Planon app by providing them with a URL that gives access to the app. This URL or 'deep link' can be sent via an e-mail or text message to the relevant users.

If these users do not have the Planon app yet, clicking the link will take them directly to the Planon app in the App store or Google Play store.

If the Planon app is already installed, it will be opened.

It is also possible to guide users directly to the right app *module* by giving them a deep link which includes the module's system name. See [Creating deep link URLs to access the Planon app](#) for more information.

## Access for app users to Self-Service forms

Besides directing app users to a specific **Planon app** module, you can also use deep link URLs to direct them to a **Self-Service** (PSS) form. The app users will be able to access this form from their mobile device via the deep link URL sent to them via an email or chat / text message, or other method. This is only possible if this deep link includes a *URL parameter* that contains either a relative or an absolute path to the form.



By combining Self-Service deep links with the use of access keys for the **Planon app**, you will make sure that **Planon app** users can open Self-Service forms from their phones directly, *without having to sign in again*. See [Planon Live App access keys \(login methods\)](#) for more information on access keys.

Examples of deep links to Self-Service forms (the italicized parts in the example are the URLs pointing to the form):

- Relative: `https://live.planon.app/dl?url=case/BP/SC001`
- Absolute: `https://live.planon.app/dl?url=https://<environment base URL>/case/BP/SC001`

You can use the above examples to create deep links that point to Self-Service forms in your specific Planon configuration.


# Request forms

**Planon Live app** comes with a preconfigured, ready-to-use **Request forms** module.

In the **Request forms** module, you can create new request forms or customize existing ones. By configuring the **Request forms** web definition, you can create as many different request forms as needed. These can subsequently be used in all the other app modules.

The configured request forms allow end users to submit all kinds of 'calls', from compliments / complaints, to requests for minor repairs or requests to solve IT-related problems, and so on.

For more information on the configuration, see [Request forms web definitions](#).

 **Text** (string) and **Number** fields are supported in request forms. **Reference fields** are available as of release L57. Other field types will be made available for request forms in due course.

## Web definitions, pages and blocks

In Planon's App configuration, you use **web definitions** to configure modules for your mobile app. A web definition consists of several hierarchical items, such as **pages** and **blocks**, each with their own purpose.

**Pages** are used to configure a page title in various languages and make a setting to allow tailor-made (TMS) blocks / cards.

The following page types are available:

- **Start page** - the container for one or more blocks used to display and search primary information on an item
- **Summary page** - the container for one or more blocks used to display background information

Pages can include one or more blocks (sometimes also referred to as 'cards' because of their appearance on the app). **Blocks** are used to configure the actual fields and actions (buttons and so on). End users will use these to get information or submit data to a back-office environment.

The following generic, configurable block types are available:

- **Search block** - allows app users to enter queries
- **List block** - allows app users to view the results of a search
- **Details block** - allows app users to view detailed information
- **Filter block** - allows app users to apply filtering to a list

In addition, there are many module specific block types, such as the **Favorites** block on the **Personnel** web definition or the **Facilities** block on the **Reservations** web definition, for example.

User can be granted access to a module on the mobile app by linking their user group to the appropriate web definition. See [Linking user groups to web definitions / granting access to modules](#) for more information about granting access to a mobile app.

## User access to mobile app modules

User access to Planon's mobile app modules can be configured by linking a relevant user group to the web definition in which a module is configured.

Example: The **Reservations** module of the **Planon Workplace app** is configured in the **Reservations** web definition. By linking the user group that is permitted to use the

**Reservations** module to the **Reservations** web definition, you will grant its users access to the module on the app.



If zero user groups are linked to a web definition, users from all user groups who open the Planon Live app will be able to access that specific module. By linking at least one user group to a web definition, you make sure that access is only granted to *linked* user groups.

See [Linking user groups to web definitions / granting access to modules](#) for the procedure.

# Generic features - settings and configuration

The Planon Live App includes some generic features that apply to all modules.

## Start page

The **Start page** module includes the **Mobile start page** web definition. This web definition contains all generic app information and settings.

The settings you make here apply throughout the Planon Live mobile application.

On the lower panel, under **Application settings**, you can configure page settings and preferences, for example to allow tailor-made (TMS) information blocks or showing a QR code scanner on the mobile apps. Here, you can also make settings for the personal details, preferences and privacy of logged-in users, at the **Edit personal details** and **Settings** pages.

The **Settings** page includes the following subpages:

- About
- Privacy
- Preferences
- Admin tools

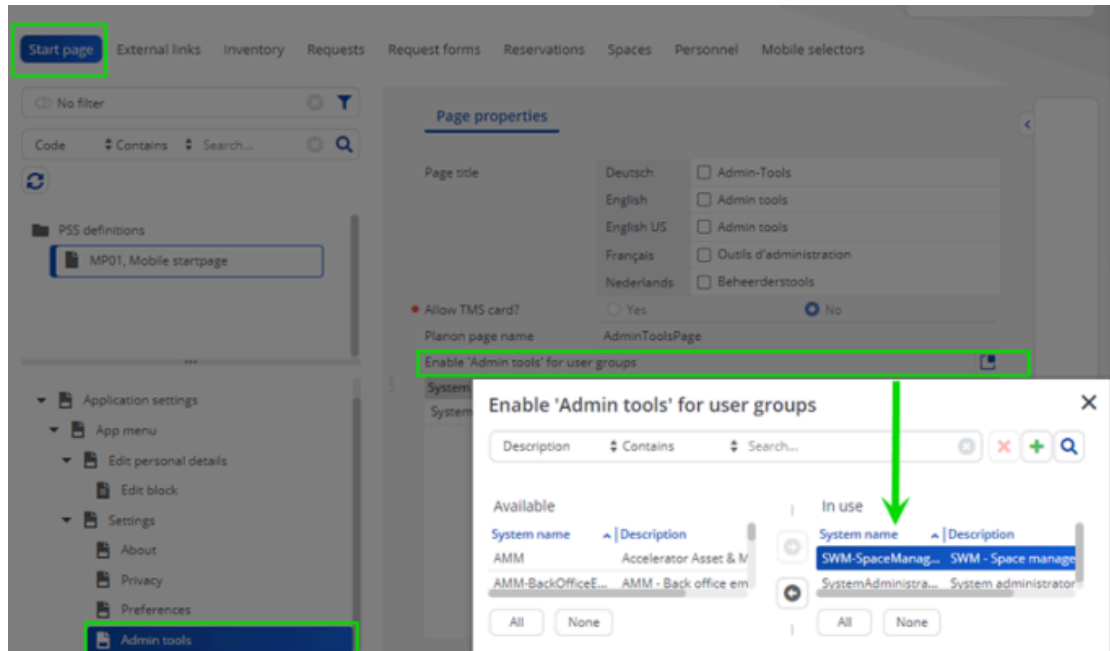
In addition to free text fields, the **Edit personal details** page > **Edit block** supports the following field types:

- Reference fields
- Picklists
- Free fields

On most subpages you can only edit the **Page title** or choose to set **Allow TMS card?** to **Yes** if you want to allow custom blocks on the app.

The **Admin tools** subpage also includes an *additional setting* to grant user access to **Admin tools** on the app. By linking user groups via the **Enable 'Admin tools' for user groups** field, only these linked user groups will be able to use the features from the admin toolbox in the app, for example **Write NFC tags**.





For more information about using the **Admin tool** feature on the app, see [Generic features](#) in the *Planon Live Workplace app* documentation. For more info on configuring NFC tag writing from within the Planon Live app, see [Writing NFC tags](#).

## Creating deep link URLs to access the Planon app

If you want to make it easier for users to access the Planon app, or if you want to direct them to a specific app module, you can provide them with *deep link URLs*. These deep links can be sent to the app users via an email or text message. All they have to do is click it and the app is opened. They are immediately directed to the location specified by the deep link.

### Procedure

1. To allow app users to simply open the Planon app, draft an email or text message and include the following URL: `https://live.planon.app`
2. To allow app users to open a specific module within the Planon app, for example Reservations, draft an email or text message and include the following URL: `https://live.planon.app/dl?module=MobileReservationRoot`.

**In Planon ProCenter , the deep links to directly link to a specific app module are shown in the Deep link URL field of the related web definition.**

3. On the navigation panel, go to Live app > App configuration and open the relevant app module, for example Personnel.

4. Select the relevant Personnel web definition, like Colleagues in Planon Accelerator for example.
5. On the Module settings tab, go to the Deep link URL field and copy and paste the value from this field into your communication.
6. Send your message including the deep link URL to the relevant app users.

## Code scanning in the Planon Live app

### Central code scanner

The Planon Live app has one *central* code scanner. If you scan a *Planon QR code*, the app can tell from the QR code what object is being scanned: an asset, a space, a desk etc. This information is stored in the QR code. Based on that data, the relevant app module is opened directly from the central QR scan button.

See [Supported bar codes in Planon Live app](#) for the supported bar code types.

Examples:

- If you scan a space code and the space is linked to a reservation unit, the **Reservations** module is opened.
- If you scan a workspace code, the **Reservations** module is opened.
- If you scan an asset code, the **Inventory** module is opened.



- If you use NFC tags underneath the QR codes (both based on Planon QR codes), scanning an NFC tag will open the app and navigate to the correct module. See for more information on configuring NFC tags.
- You can use the central scanner to allow scanning of custom (non-Planon) QR codes. *This has to be implemented per app module.* This feature will only work for modules that have the setting **Show QR code scanner** set to **Yes**. Example: if you scan an asset code, you are offered the module(s) in which the scanned code occurs as a field value in any of the fields that were configured on the **Search bar** (see **Custom QR codes on search blocks** below). *This feature works for the Inventory module and the Assets module.*

### Custom QR code scanner on Search blocks

- Throughout the Planon Live app, you can activate the option **Show QR code scanner** on the **Search** blocks of the [selectors](#) for **Spaces**, **Assets** and **Properties** reference fields. This will enable app users to scan QR codes (not just Planon QR codes) from within the search bar of a module when searching for assets, spaces and properties.
- In addition, you must add the field that can hold the value of this QR code to the search block. Typically, this will be the **Code** field. For assets there is an additional **Asset tag** field that can also be used for bar codes and QR codes. If a scanned code finds a match in any of the configured search block fields, the results are shown in a list on the app. Users must select a likely result themselves and open the appropriate module.

# Mobile selectors and reference fields

Thanks to the available **mobile selectors**, app users can edit reference fields or perform searches on the forms in their app. In the Live app configuration, mobile selectors are used to define the 'behavior' of these reference fields. Frequently used reference fields belong to business objects such as **Properties**, **Departments**, **Assets**, **Spaces** or **Requests**.



A reference field on a business object points to a record of another business object. For example, a **Space** reference field on a **Request** will refer to a specific space. By clicking the **Select a value button** in a reference field, a list of records from this other business object is displayed. Users can select one of these records to create a reference to their selected record.

Example: **Request forms** on the app will often include reference fields driven by selectors. On a request form for catering or cleaning, frequently used reference fields are **Reservation unit**, **Space**, **Cost center** or **Department**.

If no mobile selector exists in a web definition for a referenced business object, it is *automatically* created when adding a field of this type to a web definition. However, you can also manually add a selector.

You can add selectors to:

- Field types such as 'pop-up' fields, 'search' fields and 'display value' fields on business objects.
- Standard orders

## Support users with actions on the app by adding a display

On a selector, you can configure a **Display text**. This text can be used to support users when they are performing actions on the app. Configure a **Code** field, **Name** field or any other simple field (such as a string, integer or big decimal field) for the display text.



You cannot select reference fields or calculated fields as display text of a selector.

## Help users to select fields by providing additional context selector

On the **Mobile selectors** web definition, a **Filter block** is available. You can add fields to this **Filter block** to provide additional *context* to reference fields. When app users fill in these reference fields, for example on an **Add** form, **Edit** page or a on a **Filter** page, the field values from the filter block are used to filter the list.

Example: the **Property** field is added to the **Filter** block of a **Spaces mobile selector**. Result: if a property is already filled in on the app (automatically or by the user) and the user wants to select a space on the same form / page, the displayed list is filtered to only show spaces from that property.

# Request forms web definitions

You can add and customize **Request forms** web definitions to your requirements, by setting page properties for the pages and configuring layouts for the blocks.

Requests forms are used in those Planon Live app modules where app users are allowed to submit service requests. For example **My inventory**, **Reservations**, **Requests**. If app users belong to a linked user group, they will see these forms upon tapping the **Request** button on the app. They can subsequently submit a service request, for example about their personal inventory, a meeting room, flexible workspace and so on. Service requests may include cleaning requests, incidents, catering requests, complaints etc.

A **Request forms** web definition consists of a **Add form page** and a **Details page**. These configurable pages include several blocks:

- The **Add form page** consisting of 2 blocks: the **Add form block** and **Upload** block. These blocks allow app users to fill in a service request form and upload a photo. Add relevant fields to the **Add form block**.



If your organization has enabled the setting that the **Requestor's** field values for **property** and **space** should be automatically taken over to requests (in **Field definer Orders Business object settings**), you are advised not to use the **Requestor** field on the request form's **Add form block**. Use the **Created by** field instead. Thus you will prevent that the space and/ or property for which a requestor actually fills in and submits the request form, are automatically overwritten by the requestor's own property and space. After all, the property or space for which requestors want to report an issue are not necessarily their own building or office.

- The **Details page** will display detailed information from a selected request form on the app.

A request form must be based on a standard order in Planon. In principle, the app will only display the **request forms** that are linked to the app user's user group. If no user groups are linked to a request form, the form will be available to all users.

You can provide more context for displaying the form, by using *applicability filters* on the standard order and thus making the form specific to an **asset group**, a **space category** or a **user group**.

A standard order that is linked to a **Request forms** web definition and that has applicability enabled for:

- *all or specific* user groups -> will show the form if a linked user adds a request in the **Requests** module.
- *all or specific* asset groups -> will show the form if a user adds a request for a linked asset in the **My inventory** module.
- *all or specific* space categories -> will show the form if a user adds a request for a linked reservation unit in the **Reservations** module.

- If you want to use selectors in mobile request forms, to make references from one business object to another, you can only use [Mobile selectors and reference fields](#).
  - To learn more about standard orders and applicability filters, see [Configuring standard orders for mobile requests](#).
- 
- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration - Overview](#).
  - For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring standard orders for mobile requests

You can determine which standard requests or standard orders should be displayed on the app when the app user is submitting a request.

By using the **Applicability** feature on standard requests / orders you can determine very precisely which requests / orders should be listed on the app when users create a service request. You can choose to either *include* or *exclude* all user groups, asset groups, space categories and properties, or you can be very *specific* about which user groups, asset groups, space categories and properties should be used as filters, to display standard requests / orders on the app.

- The settings you make for **Applicability** will apply to all web definitions using standard orders in Planon Universe (in Web Configuration, Self-Service forms and on the Planon Live apps). For general information on the **Applicability** feature of standard requests / orders, see **Supporting Data > Standard orders > Defining a standard order's applicability** in the WebHelp.

The following example from *Planon Accelerator* illustrates how the applicability feature works for Planon Live apps. In the Planon Workplace app, most modules are provided with an action button to create service requests. Your configuration of the **Applicability** feature determines if the button is visible to the app user and which standard requests / orders are displayed.

### Procedure

1. On the navigation panel, go to Business processes > Standard orders and select a relevant standard order, for example CA001, Complaint or FM-01, Request FM.
2. Go to the Standard order links tab.
3. If you want display the selected standard order to *all* user groups, asset groups, space categories or properties, set the relevant Applicability [...] field to All and click Save.
4. If you want to display the selected standard order to none of the user groups, asset groups, space categories or properties, set the relevant Applicability [...] field to None and click Save.

5. If you want to display the selected standard order for *specific* user groups, asset groups, space categories and properties, set the relevant Applicability [...] field to Specific and click Save.
6. If Specific is selected, go to the action panel and click the relevant Link action (user groups, asset groups, properties or space categories).
7. Link the relevant user groups, asset groups, space categories and/or properties to the selected standard order.

**App users can submit requests based on the applicability of the standard orders you selected.**



The **Request** button, which enables app users to submit a request, will only become visible on the app if the app users, their possessions or their locations, are linked to a user group, property, space category or asset group that is included in the **Applicability** filter, or if the **All** option is selected for these items.

## Configuring an upload block for request forms

An upload block allows app users to upload images / photos via the request form.

### Procedure

1. In Live app > PWEA (Live app) select the Request forms module.
2. Select the Request forms web definition whose Upload block you want to configure.
3. At the bottom panel select the Upload block.
4. Make sure that the Allow upload field is set to Yes.
5. In the Communication log type field, select the type of communication log that should be used for the request form.
6. In the Communication log field field, select the relevant file location:
  - Document reference
  - Document (secure)
  - Image
7. In the Label field and Title field enter the appropriate labels and titles for the upload block in various languages.

**The File types field displays supported file formats:**

*.heic, .heics, .rtf, .doc, .docx, .txt, .ppt, .pptx, .xls, .xlsx, .pdf.*

**The System max. upload size (MB) field displays the maximum upload size in MB.**

Both fields are read-only.

8. Click Save.

**The settings are applied to the selected request form.**


## Adding questionnaire fields to request forms

You can add **Questionnaire** fields to the request forms to gather additional information on the request. For more information on questionnaires, see [Questionnaires](#).


### Procedure

1. In Live app > App configuration, select the Request forms module.
2. Select the Request forms web definition to which you want to add questionnaire fields.
3. At the bottom panel, select the Add form block.
4. In the Add fields tab, click the **Add fields...** button.

**The Add fields... window appears.**


 The questionnaire fields displayed in the list are based on the standard order linked to the **Request form**.

5. Select the questions from the list that you want to add.

 Selecting question fields in combination with a standard order reference field is not supported.

6. Click **OK**.

**The selected questions are added.**

 The maximum number of fields that can be added is 15.

7. At the bottom panel, select the Requests block.
8. On the Details fields tab, click the **Add fields...** button.

**The Add fields... window appears.**

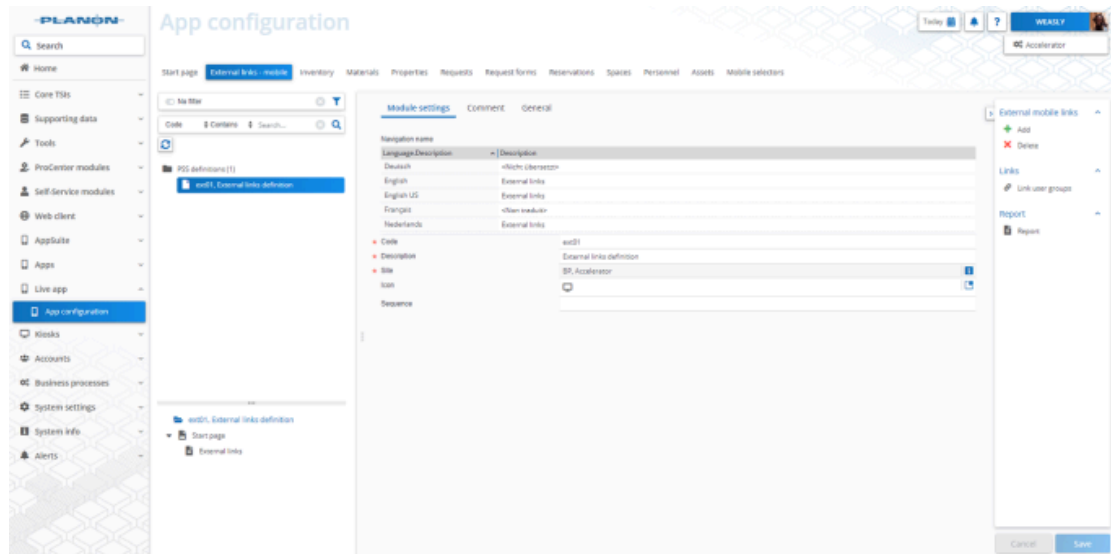
9. Select the same questions you added in the Add form block (see step 3 of this procedure).
10. Click **OK**.

**The selected questions are added and displayed at Request details page of the Planon Workplace app .**

## External links web definition → External links module

Planon Live > App configuration > External links comes with a preconfigured, ready-to-use web definition, called **External links**.

You can customize this web definition to modify the existing **External links** app module or create and customize a new web definition. See [Configuring 'External links' web definitions](#) for more information.




The pre-configured **External links** web definition is used to display an **External links** module in the **Planon Workplace app**. This module enables app users to click on a URL which opens the site in your default browser.

## Configuring 'External links' web definitions

You can customize the standard delivered **External links** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **External links** module on the app to click on a URL which opens a site in the default browser.

The **External links** web definition consists of a **Start page** with an **External links** block. This block enables end users to view links on the app. For information on adding links in the **External links** block, see [Adding links in External links](#).

-  For generic information about configuring PSS2-based web definitions, see the [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Adding links in External links

In the **External links** module, you can add links which end users can open in their browser.

### Procedure

1. On the navigation panel, go to Live app > App configuration and select the External links module.
2. Select the web definition you want to configure or create a new one.



3. Select External links from the bottom elements panel on the left.
4. In the action panel, click **Add**.
5. In the Link Name give a name to the link.
6. In the URL, assign a URL which should open when it is selected.

**For example, if you want to add a Facebook button, you must assign the URL: *https://www.facebook.com/*.**

7. In the Icon field, select a suitable icon.
8. In the Is visible field select Yes.
9. Click Save at the bottom right.

**A maximum number of 30 links can be added to the module.**

## Creating dynamic subtitles on summary pages

You can create dynamic subtitles for all summary pages of preconfigured Planon Live app modules. This will make the summary page more intelligible and user-friendly.

Titles of **Summary** pages in the Planon Live app modules are configurable and translatable. The chosen static title is permanently shown on the app's summary page. Examples of summary page titles in the Planon Workplace app : *Colleague details*, *Inventory details*.

Subtitles of **Summary** pages can be configured to be static just like titles, but they can also be made *dynamic*, using macros. The Planon Live app modules include various preconfigured subtitle macros on summary pages, to implement this dynamic behavior on the app. If an app user selects a record on a summary page, the page subtitle will change accordingly, displaying the values of the newly selected record. For example, if the selected record is a person, the selected person's first and last name will be displayed (preconfigured macros). But you can add different macros as required. You could, for example, also display a person's title. Similarly, you could display an inventory item's brand alongside its name.



You can only use 'free input' text fields (field type: String) to create these macros. Reference fields, boolean fields or date-time fields will not work. Also, keep in mind that the length of the displayed text on the app is limited, so one or two macros will probably suffice.

The following procedure is an example for the **Inventory** module, but you can apply the general principle to all summary page subtitles.

### Procedure

1. In App configuration, go to Inventory and select the relevant web definition, for example Inventory.
2. On the bottom panel, expand the web definition's Start page and select the Summary page.

3. On the data panel, go to the Subtitle field and add the required macro to the relevant languages.

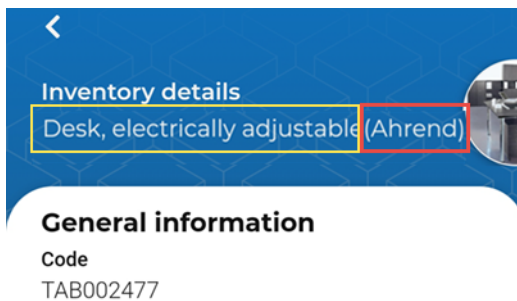
**A subtitle can hold multiple macros. You can use separators such as brackets or hyphens to make the text more readable. If you configure two macros, the syntax could be as follows:**

```
[&fieldname]([&fieldname])
```

**Example for inventory items: *[&Name] ([&Brand])***

4. Click Save.

**On the Inventory module's summary page (Inventory details), the logged in user will see that the subtitle displays the name and (between brackets) the brand of the selected inventory item.**





**If the user selects a different item, the subtitle will change accordingly.**

# Planon App web definitions

Planon administrators can configure the standard delivered web definitions in the Planon App to create customized app environments for their app users, such as the Planon Workplace app - or the PMFS Live app .

The following procedure outlines the generic steps for a web definition's configuration. The **Reservations** module is used as an example. However, the configuration options available for different pages and blocks can vary considerably.

 For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp.

 You need a specific solution license for (combinations of) Planon app modules. The user group(s), that you link to a web definition, must also be linked to the solution license, for the link to take effect. • To be able to configure the web definitions of the Planon Workplace app , Planon administrators require **Solution License APP100S - Planon Workplace App**.

- For the PMFS Live app they require **Solution license APP 200S**. A solution license can be linked to an administrator's user account in the **Accounts** navigation group at: User groups > User group details > Solution licenses.
- In case of the **Assets** module, the *Planon Mobile Asset Manager* license is required.

## Procedure

1. In ProCenter, go to Live app > App configuration.
2. Select the relevant module, for example Reservations.
3. Select an existing Reservations web definition or add a new one.
4. On the General tab of the web definition, enter a code, description, icon and navigation names in the applicable languages.

**These navigation names are the names used to label the modules on the app.**

5. If the General tab includes additional fields, fill in these as well.

**Example: fields in which you can link standard orders to a web definition.**

6. At the bottom of the web definition panel, expand the web definition's tree and select the Page or Block you want to configure.
7. If you select a page, enter an appropriate title on the Page properties panel and make a setting to allow or prohibit TMS cards for this page.
8. If you select a block, make additional settings on the data panel, by configuring fixed filters, adding fields, limiting the number of rows, choosing icons, adding selectors and making other settings with regard to the display of results or information.

**i** For the convenience of the app user, try to avoid the screen from becoming too 'crowded'. Only add the most relevant fields to blocks, such as **Code** and **Description**, and relevant reference fields. Most blocks in the Planon app have a limit on the number of fields, which cannot be exceeded. For example: with most **List** blocks, **Search** blocks and **Overview** blocks, the maximum is **6** fields (such as the **My reservations block** in the **Reservations** module, or the search blocks and list blocks in the **Assets** module). The **Add form** block in the **Request forms** module has a maximum of **15** fields.

9. Click Save.

**Your web definition's configuration is finalized and will be shown on the mobile app.**

10. On the action panel click Link user group to link your web definition to the appropriate user group.

## App configuration TSI

The **App configuration** TSI is where you add and configure *Planon-created* modules that you want to include in the Planon Workplace app or in the PMFS Live app .

**i** You need a specific solution license for (combinations of) Planon app modules. The user group(s), that you link to a web definition, must also be linked to the solution license, for the link to take effect. • To be able to configure the web definitions of the Planon Workplace app , Planon administrators require **Solution License APP100S - Planon Workplace App**.

- For the PMFS Live app they require **Solution license APP 200S**. A solution license can be linked to an administrator's user account in the **Accounts** navigation group at: User groups > User group details > Solution licenses.
- In case of the **Assets** module, the *Planon Mobile Asset Manager* license is required.

Planon-created content includes the following pre-configured mobile app modules

**Planon Workplace app :**

- [My inventory](#)
- [Reservations](#)
- [Colleagues](#)
- [Requests](#)
- [Spaces](#)
- [External links](#)

For basic information on how to configure **Planon Workplace app** modules, see: [Configuring 'Inventory' web definitions](#), [Configuring 'Reservations' web definitions](#), [Configuring 'Personnel' web definitions](#), [Configuring 'Requests' web definitions](#), [Configuring 'Spaces' web definitions](#) and [Configuring 'External links' web definitions](#).

**i** For end user information on the **Planon Workplace app** , see [About using the Workplace app](#).

### Mobile Condition Assessor app

### Mobile Assessment Survey app

### Mobile Observations app

#### Assets:

The **Assets** module can be added to the Planon Live app configuration as 'stand-alone' module. See [PMFS Live app - Assets module configuration](#) for basic configuration information.

#### PMFS Live app :

- Assets
- Work assignments

#### Generic, supporting modules:

- [Mobile selectors](#)
- [Request forms](#)



The configuration of 'mobile' web definitions is very similar to the configuration of web definitions in Planon **Self-Service** modules. You can also add 'new' web definitions, which are basically copies of the delivered web definitions, and customize these entirely to your requirements. For more information on adding and configuring web definitions, refer to Self-Service > Web configuration in the Planon WebHelp.

#### Module sequence:

You can set the order in which the modules are displayed on the app via the **Sequence** field on the web definition's module settings:

Language.Description	Description
Deutsch	Reservierungen
English	Reservations
English US	Reservations
Français	Réservations
Nederlands	Reserveringen

• Code: R01

• Description: Reservations

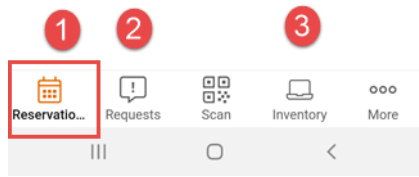
• Site: BP, Accelerator

Icon:

Sequence: 1

In the above example, the **Reservations** module is configured as the first module.

This is what it looks like on the app's navigation bar:



## Linking user groups to web definitions / granting access to modules

You can grant users access to specific modules on the Planon Live app by linking their user group to a relevant configured web definition. See [User access to mobile app modules](#) for the concept behind access to web definitions.

**i** Before linking a user group, make sure that it is correctly configured in the **Authorization** TSI. See the *Authorization* user documentation for more information.

### Procedure

1. On the navigation panel, go to Live app > App configuration.
2. Select the tab that includes the web definition you want to link to a user group.

**for example the Reservations tab with a reservations web definition (the name of the web definition depends on your configuration).**

3. Select the web definition.
4. On the action panel, select Link user group.

**The Link user group dialog box opens.**

5. Select and move the relevant user group(s) to the In-use section.

**Examples: the Planon Workplace app modules require a user group that includes requestors (people who are allowed to book rooms / desks and submit requests). The Assets module may require a linked user group of maintenance engineers.**

6. Click OK.

**The dialog closes. Only users who belong to the linked user group(s) will be able to access the corresponding module on the Planon Live app.**

# Planon Workplace app - configuration

The Planon Workplace app includes various modules that work 'out-of-the-box', but can also be further configured to meet your specific requirements. The modules are based on Planon ProCenter's PSS2 technology. This means that you can add or edit pages and forms to the app via [Web definitions, pages and blocks](#), and create the configuration that best meets your requirements.

## Workplace modules

Planon Workplace app is a licensed app solution that can be used on the Planon Mobile apps platform.

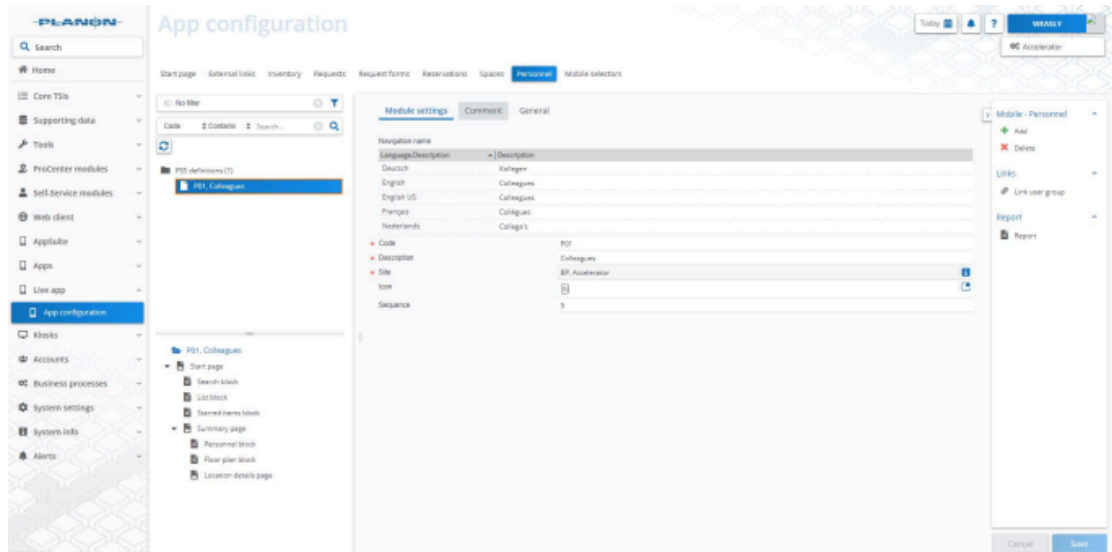
The modules in the Planon Workplace app solution all play a part in enabling app users to engage with their working environment. The following configurable web definitions (modules) are included:

- [Personnel web definition](#) → [Colleagues module](#)
- [Inventory web definition](#) → [My inventory module](#)
- [Bookings web definition](#) → [Bookings module](#)
- [Reservations web definition](#) → [Reservations module](#)
- [Spaces web definition](#) → [Spaces module](#)
- [Requests web definition](#) → [Requests module](#)
- [Visitors web definition](#) → [Visitors module](#)

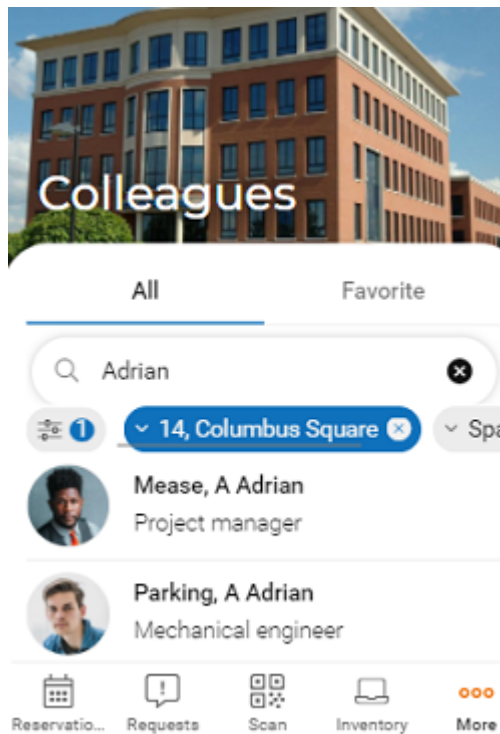
## Personnel web definition → Colleagues module

Planon Live > App configuration > Personnel comes with a preconfigured, ready-to-use web definition, called **Colleagues**.

You can customize this personnel-based web definition to modify the existing **Colleagues** app module or create and customize a new web definition. See [Configuring 'Personnel' web definitions](#) for more information.



The **Personnel** web definition is used to publish a module in the **Planon Workplace app** that enables users to search for colleagues and other staff.



**i** An existing or new **Personnel**-based module can be configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Personnel** web definition and hardly do any configuration, or create a fully customized app.



## Requests web definition → Requests module

Planon Live > App configuration > Requests comes with a preconfigured, ready-to-use web definition, called **Requests**.

You can customize this personnel-based web definition to modify the existing **Requests** app module or create and customize a new web definition. See [Configuring 'Requests' web definitions](#) for more information.

### App configuration

The screenshot shows the 'App configuration' interface for the 'Requests' module. The top navigation bar includes 'Today', a notification bell, a help icon, and the user 'SUPERVISOR S'. Below the navigation bar, the 'Requests' tab is selected, with other tabs like 'Request forms', 'Reservations', 'Spaces', 'Personnel', and 'Mobile selectors' visible. The main content area is divided into a left sidebar and a central configuration panel. The sidebar shows a tree view of 'PSS definitions' with 'MR01, Requests' selected. The central panel has tabs for 'General', 'Comment', and 'General'. The 'General' tab is active, showing a table for 'Language.Description' with columns for 'Language' and 'Description'. The table contains entries for Deutsch (Meldungen), English (Requests), English US (Requests), Français (Appels), and Nederlands (Meldingen). Below the table, there are fields for 'Code' (MR01), 'Description' (Requests), 'Site' (BP, Accelerator), 'Icon', 'Sequence' (2), 'Deep link URL' (https://live.planon.app/dl/?module=MobileRequest), and 'Show request grouped...' (Yes). A right sidebar shows a list of 'Mobile - Requests' with 'Add' and 'Delete' options, and a 'Report' section with a 'Report' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

The **Requests** web definition is used to publish a module in the **Planon Workplace** app that enables users to monitor their outstanding requests in the app's **Requests** module.



## Requests

- > Reported (9)
- > In progress (1)
- > Completed (0)

Create request



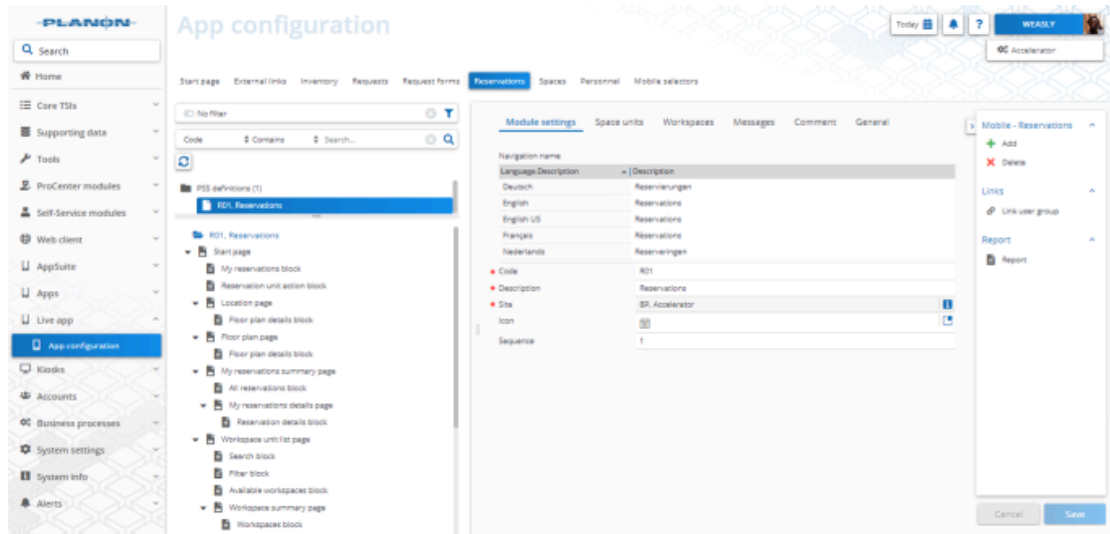
App users can also create new requests by selecting the **Create request** button.

The way the Requests list is displayed on the app is configurable. For more information, see [Configuring the List blocks in Requests](#).

**i** The ready-to-use **Requests** module can be further configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Requests** and hardly do any configuration, or create a fully customized app.

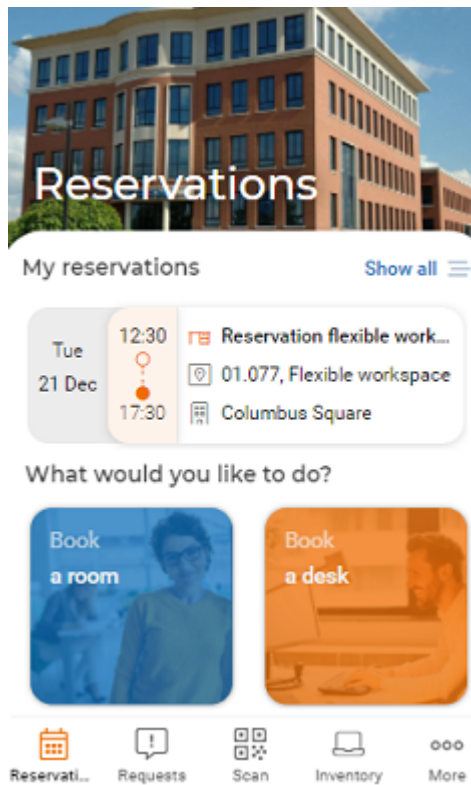
## Reservations web definition → Reservations module

Planon Live > App configuration > Reservations comes with a preconfigured, ready-to-use web definition, called **Reservations**.



You can customize this reservations-based web definition to modify the existing **Reservations** app module in the **Planon Workplace app** or create and customize a new web definition. The preconfigured **Reservations** web definition displays information to app users about existing reservations that they submitted to the back-office and enables them to book meeting rooms or claim flexible workspaces.

See [Configuring 'Reservations' web definitions](#) for more information.

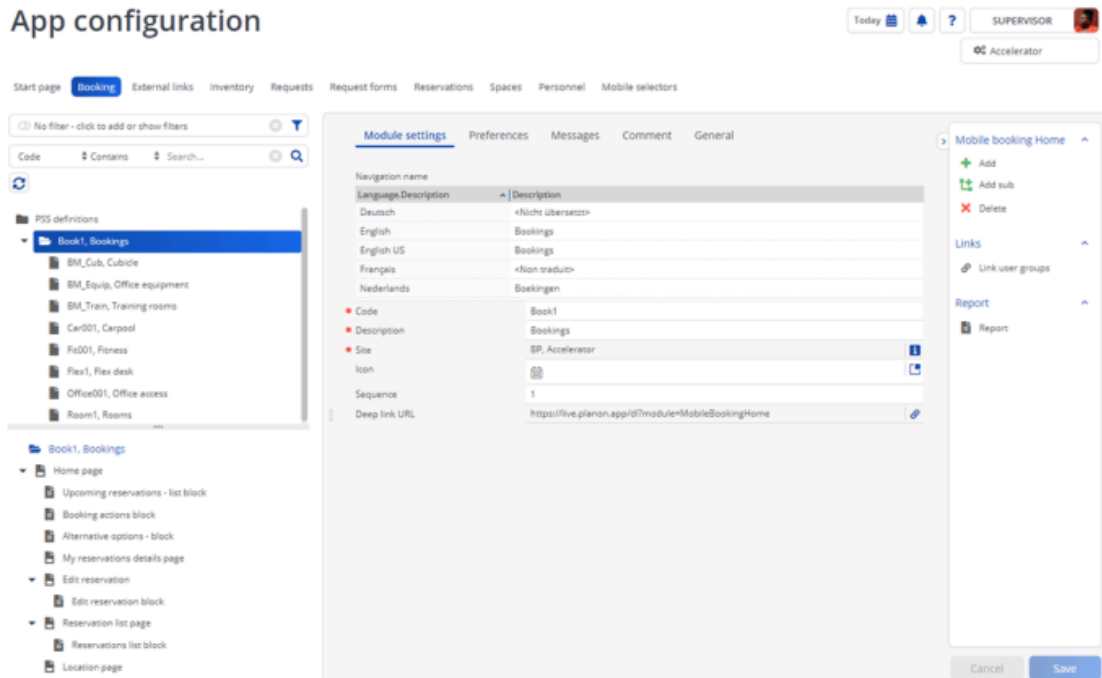


**i** The ready-to-use **Reservations** module can be further configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination

of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Reservations** and hardly do any configuration, or create a fully customized app.

## Bookings web definition → Bookings module

Planon Live > App configuration > Bookings comes with a preconfigured, ready-to-use web definition, called **Bookings**.



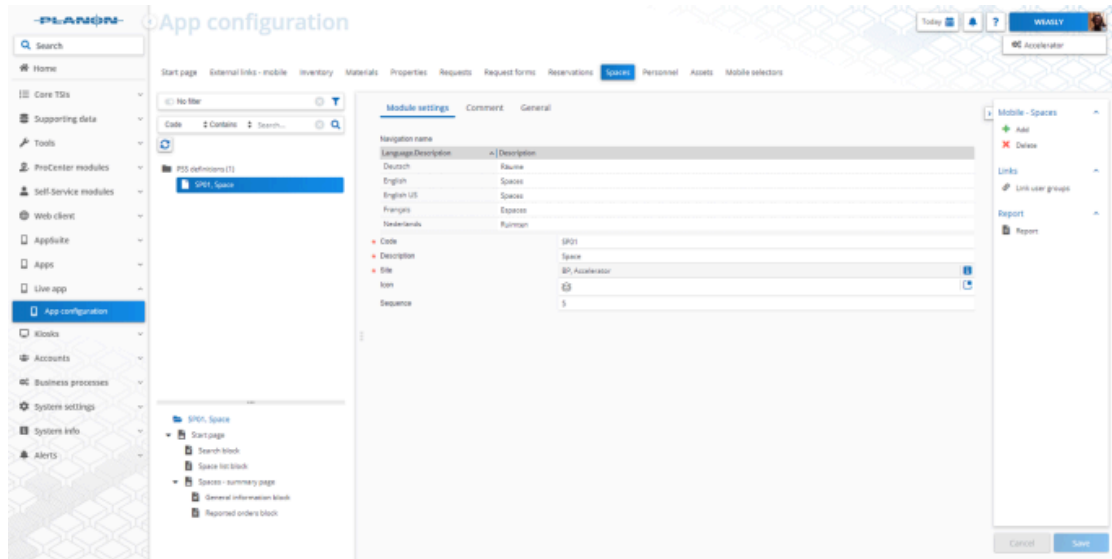
You can customize this web definition to modify the **Bookings** app module in the **Planon Workplace app** or create and customize a new web definition. See [Configuring 'Bookings' web definitions](#) for more information.

The preconfigured **Bookings** web definition informs app users about their existing reservations and enables them to book (meeting) rooms, corporate assets and flexible workspaces. The module supports two main booking flows, which are shown prominently on the app, and a maximum of 9 additional booking options.

## Spaces web definition → Spaces module

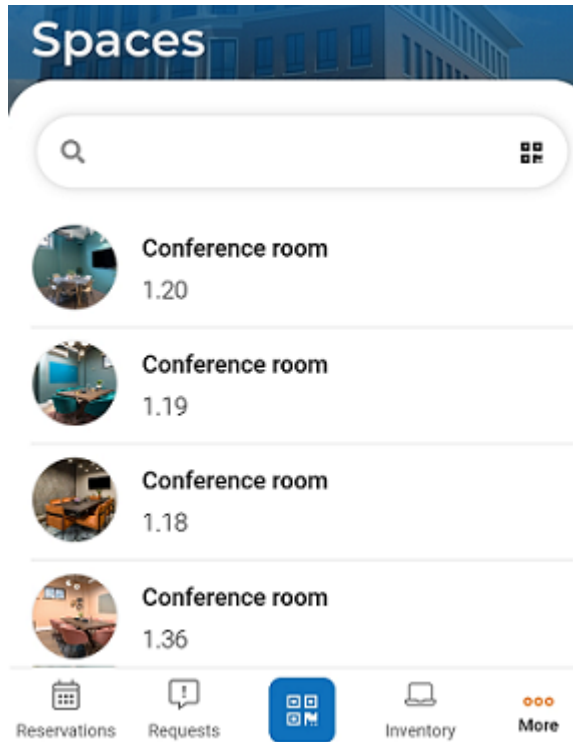
Planon Live > App configuration > Spaces comes with a preconfigured, ready-to-use web definition, called **Spaces**.

You can customize this assets-based web definition to modify the existing **Spaces** app module or create and customize a new web definition. See [Configuring 'Spaces' web definitions](#) for more information.



The pre-configured **Spaces** web definition is used to display a **Spaces** module in the **Planon Workplace app** that enables app users to scan and search the codes of non-bookable spaces and create service requests for these spaces.

The **Request** action is available on the **Spaces - summary** page. The app will only display the **request forms** that are linked to the end user's user group. If no user groups are linked to a request form, it will be displayed to all users. The label for the corresponding button is translatable.

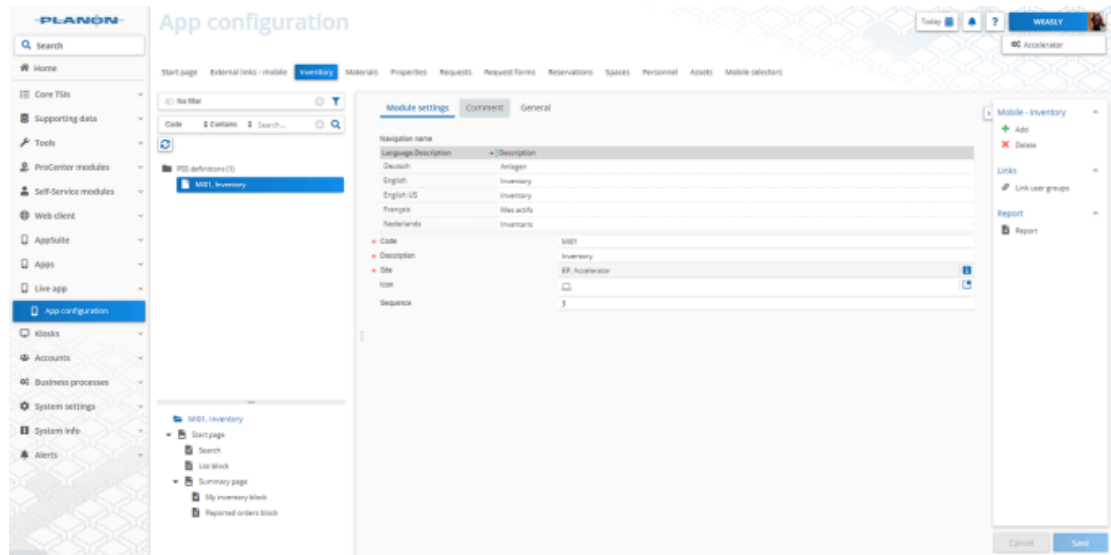


## Inventory web definition → My inventory module

Planon Live > App configuration > Inventory comes with a preconfigured, ready-to-use web definition, called **My inventory**.

You can customize this assets-based web definition to modify the existing **My inventory** app module or create and customize a new web definition.

See [Configuring 'Inventory' web definitions](#) for more information.



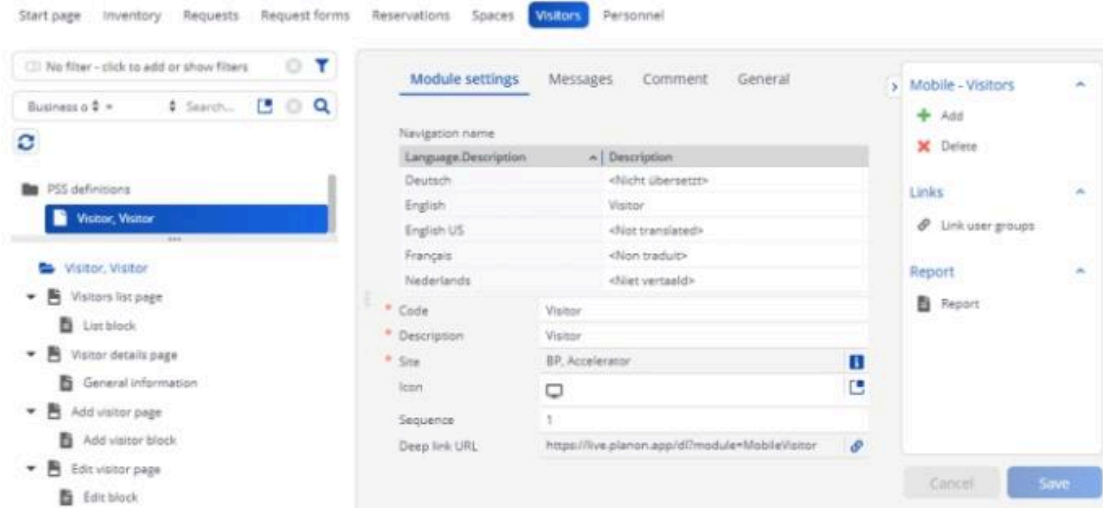
The **My inventory** web definition is used to display a **My inventory** module in the **Planon Workplace app**. This module enables app users to search for the assets that belong to them or are entrusted to them.

The module also enables app users to report incidents / submit service requests on their assets.

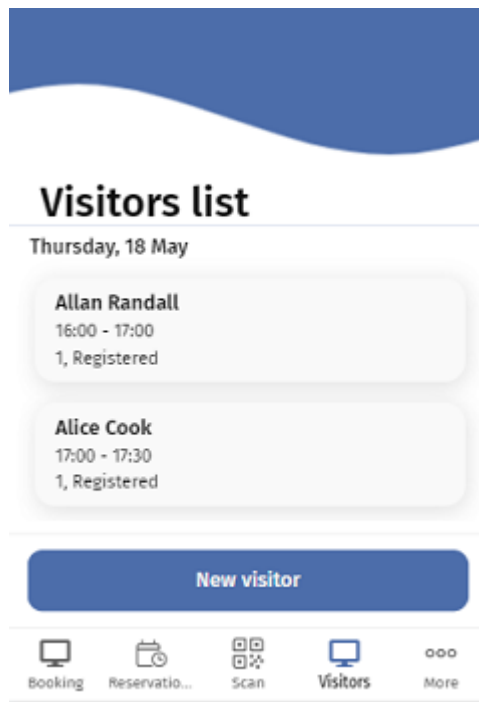
## Visitors web definition → Visitors module

Planon Live > Generic config (Live app) > Visitors comes with a preconfigured, ready-to-use web definition, called **Visitors**.

You can customize this visitors-based web definition to modify the existing **Visitors** app module or create and customize a new web definition. See [Configuring 'Visitors' web definitions](#) for more information.



The **Visitors** web definition is used to publish a module in the **Planon Workplace app** that enables you to register visitors.



**i** An existing or new **Visitors**-based module can be configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Visitors** web definition and hardly do any configuration, or create a fully customized app.

## Back-office / ProCenter settings for the **Planon Workplace** app

Apart from the settings and configuration that you can define in the **App configuration** TSI, there are Planon ProCenter fields and settings that you can use to impact the app's behavior.

- **Personnel** TSI: **Hide workspace location in app?** field of the **Personnel** business object. This field can be configured for the **Personnel** TSI, but does not play an active part in the back-office, except for *monitoring purposes*. Strictly speaking, the field does not even need to be on the **Personnel** layout. The value in the **Hide workspace location in app?** field is updated directly by app users via their **Show workspace location?** privacy setting on the app. When app users allow their location to be seen by other users, the **Hide workspace location in app?** field will switch to **No** on their **Personnel** record in **Planon ProCenter** .



It is important that the app users are given 'write' rights for the **Hide workspace location in app?** field via **Planon ProCenter** > Accounts > Function profiles. By default, the user's location is hidden (so in **Planon ProCenter** this field's default value is **Yes**). Once app users allow their current location to be shown via their app settings, the CAD drawing in the apps **Personnel** ('Colleagues') module will reveal their location to others.

- **Reservations** TSI: Date-time settings on the reservation unit overrule app settings.
  - the selected calendar in the **Calendar** field on the **Reservation unit** (or on the related property's **Calendar** field) determines a reservation unit's bookable dates and hours on the **Planon Workplace app** .
  - the same applies to the **Start date-time** and **End date-time** of the reservation unit: app users cannot make reservations that go beyond these dates / hours.
- They are thus prevented from making reservations that fall outside defined business hours, because only valid end times will be offered to them.
- **Reservations** TSI: the value entered in the **Standard order** field on the **Reservation unit** will determine which standard reservation is used to create reservations. If it is not filled in here, the standard order that is defined on the **Reservation** web definition will be used instead.
- **Reservations** TSI: if a fixed workspace from the **Spaces & Workspaces** TSI is linked to a flexible workspace in **Reservations**, the fixed workspace becomes bookable by scanning its QR code via the app. See [Generating QR codes for fixed workspaces and make them bookable](#) for more information.
- **Reservations** business object in **Field definer** : set the field **Booking utilized?** to **Yes** and add it to the **Reservations** layout, to make it



possible to *check in* on flexible workspaces or meeting rooms, by scanning their QR code.

- **Language:** the Planon ProCenter language that is selected for the app user in the **Accounts** navigation group, at User groups > Settings > User settings, is the language shown on the app.
- **24-hour notation:** if the 24-hour notation is set to **Yes** for the app user in the **Accounts** navigation group, at User groups > Settings > User settings, then this is the hour notation used on the app. If it is set to **No**, a 12-hour notation is applied.
- **CAD viewer font size:** the selected font sizes in **Planon ProCenter > Spaces & Workspaces** determine the font sizes in CAD floor plans on the app (BIA viewer). You can select the relevant font sizes at Spaces > Floor attributes. The settings apply to floor plans used in the **Reservations, Spaces** and **Colleagues** app modules.

## Configuring automatic cancelling of reservations upon 'no show'

With the right configuration, reservations for meeting rooms and workspaces can be cancelled automatically if the reservation is not utilized ('no show').

This applies to all reservations whose utilization is registered via Kiosk / Room booking panel, via mobile apps or sensors.

In other words: if the requestor of a reservation does not check in / show up at the location within a predefined period, the reservation is automatically cancelled as a result. Back-office staff can verify if a 'no show' occurred by checking the **Booking utilized?** field on a reservation.

Planon administrators can configure the automatic cancellation of 'no show' reservations, in the following TSIs:

- Business processes > **Alerts**
- System settings > **Scheduled tasks**
- Business processes > **Field definer**
- ProCenter modules > **Layouts**

### Procedure

1. Go to Business processes > **Alerts** .
2. Go to the Action definition selection level and add an action definition.
3. In the Alert condition field, add an alert condition on the Reservations BO.
4. In the Filter field, select the Start date-time field, select operator > and enter the macro `&STARTOFDAY`. In the End date-time field, select operator <= and enter the macro `&ENDOFDAY`. Then click Save and OK.

This will make the system check all reservations on the current date for a 'No show'. The 'No shows' are potential candidates for automatic cancellation by the scheduled task.

5. In the Action field of the action definition, select No show (system name: BomBookingUtilizedNoShow).
6. Select a Schedule and a Start date-time for running the action and click Save.
7. On the action panel, activate the action definition.
8. Go to System settings > Scheduled tasks.
9. Select and activate the scheduled task SYSACTIONS.
10. Go to Business processes > **Field definer** .
11. Select the Orders business object and set it to Under construction.
12. On the action panel, select Business object settings.
13. In the dialog, select the Reservations tab.
14. Under the Booking utilized heading, set the Canceling enabled field to Yes.
15. Optional: in the Cancel status field, select a relevant *Canceled* status for the reservation after the no show.
16. In the No-show time offset field, select an appropriate time span after which the 'no show' should trigger the reservation's cancellation.
17. Click Save and Close.
18. Return to the Business objects selection level and set the Orders business object to Completed.
19. Go to ProCenter modules > **Layouts** .
20. Select the Orders business object, expand this item and select Reservations.
21. Expand and select a user-defined business object, for example Reservation meeting room.
22. Go to the Layouts selection level and select the relevant layout.
23. Put it Under construction by clicking the padlock icon.
24. On the layout's data panel, click a random spot between the fields.
25. On the Reservation data panel on the right, under Unused fields, select the Booking utilized field.
26. Drag it to an appropriate place on the layout's data panel and click Save.
27. Set the layout to Completed by clicking the padlock again.
28. Repeat steps 21 - 27 for other relevant reservation layouts, for example Reservation workspace.

29. Log out and log in again to finalize the configuration.


**The Booking utilized field is now available on the Reservations layout in the Reservations TSI. If a booking remains unused because the requestor did not check in within the configured 'offset period', this field is set to No and the reservation is canceled by the scheduled task. The reservation unit is made available for booking by other users.**

## Configuring 'Personnel' web definitions


You can customize the standard delivered **Personnel** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Personnel** module on the app to find business information on their colleagues, such as their location, phone number etc.

The **Personnel** web definition consists of a **Start page** with a **Summary** subpage. The configurable pages include several blocks:


- The **Start page** consisting of 3 blocks: a **Search** block, **Filter** block and a **List** block enables end users to find personnel / colleagues, using the app.


 Besides regular fields, you can also configure **Free fields** of a supported field type and add them to a **Filter** block or **Search** block. If you configure them as a reference field, picklist or Boolean field, you can add them to the **Filter** block. If you configure a free field as a string field you can make it available on the **Search** block.

- The **Favorites** block will show a list of colleagues marked as favorites.

 On the **List** block and **Favorites** block a **Profile picture** field is available. Here, you can link any field configured as a photo reference field. By default, the **Photo** field from the **Personnel** TSI is linked.

- The **Summary** page includes a **Personnel** block, a **Floor plan** block and a **Location details** page that will show additional details on a selected person and his/her current location (space or flexible workspace) in a CAD drawing.

 Privacy settings in Planon ProCenter > Personnel can prevent this location information from being viewed by colleagues. If the **Hide workspace location in app?** field in the Personnel TSI is set to **Yes** for a selected person, or if this person set his / her location details to 'private' on the app, the location details will not be shown.

 • For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).  
• For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

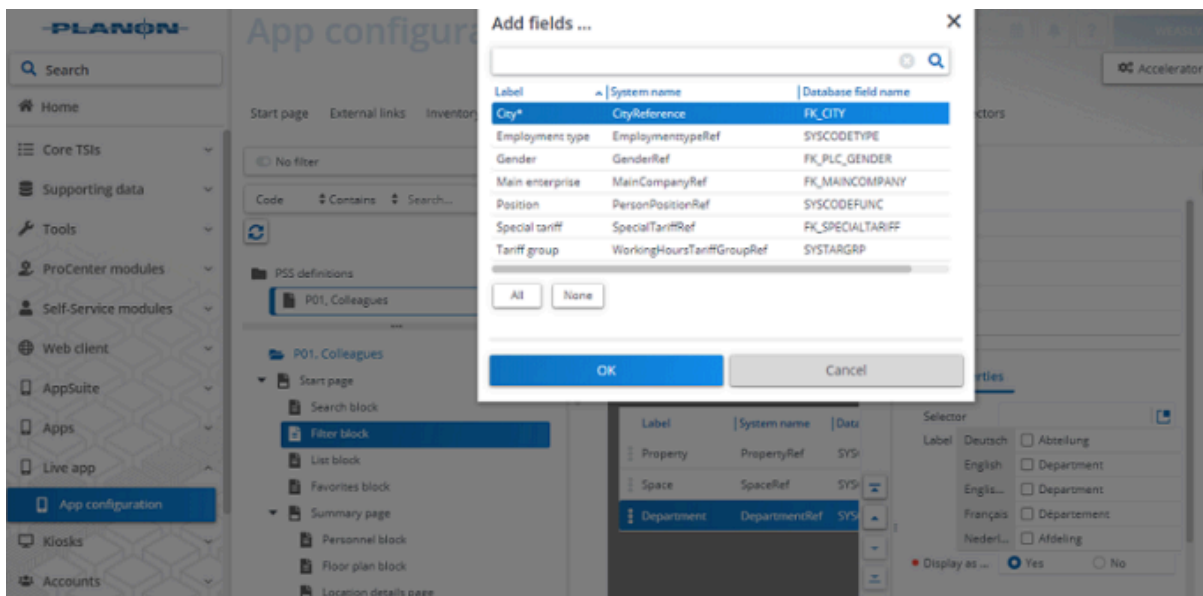
## Configuring a Filter block on a Personnel web definition

In Planon ProCenter , you can configure filter criteria for app users on the **Personnel** web definition. These filter criteria must be configured separately on the **Filter block** of start page. The following filter criteria can be configured to find a colleague:

- **City**
- **Employment type**
- **Gender**
- **Main enterprise**
- **Position**
- **Property**
- **Space**
- any other reference fields listed in the **Add fields ...** pop-up

## Procedure

1. In the navigation panel in Planon ProCenter , go to Live app > App configuration.
2. Select Personnel on the navigation bar.
3. In the elements panel, select the relevant Colleagues web definition.
4. At the bottom panel, expand the web definition and select the Start page > Filter block.
5. To enable end users to *filter* colleagues by department, add the Department field to the filter block.



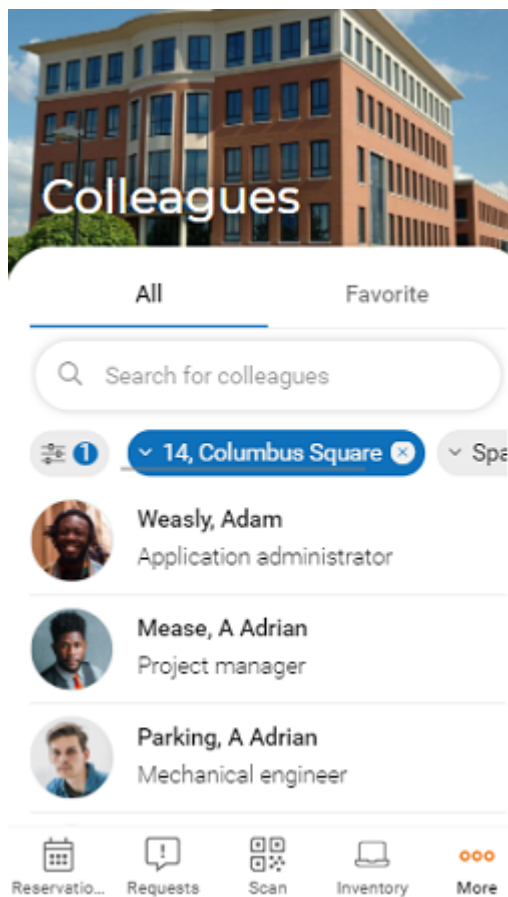
6. Add other fields as filter options, for example: Employment type, Position, or any other reference enterprise field listed in the Add fields ... pop-up window.

**i** In addition to regular fields, you can also configure **Free fields** of a supported field type and add them to a **Filter** block or **Search** block. If you configure them as a reference field, picklist or Boolean field, you can add them to the **Filter** block. If you configure a free field as a string field you can make it available on the **Search** block.

7. Optional: at Field properties, set the field Display as quick filter to Yes for those fields / filter criteria you want to show at the top of the app user's screen as a preconfigured quick filter button.

**i** The maximum number of quick filters is 5.

The following image shows 2 active quick filters on the app: **Property** and **Space**.

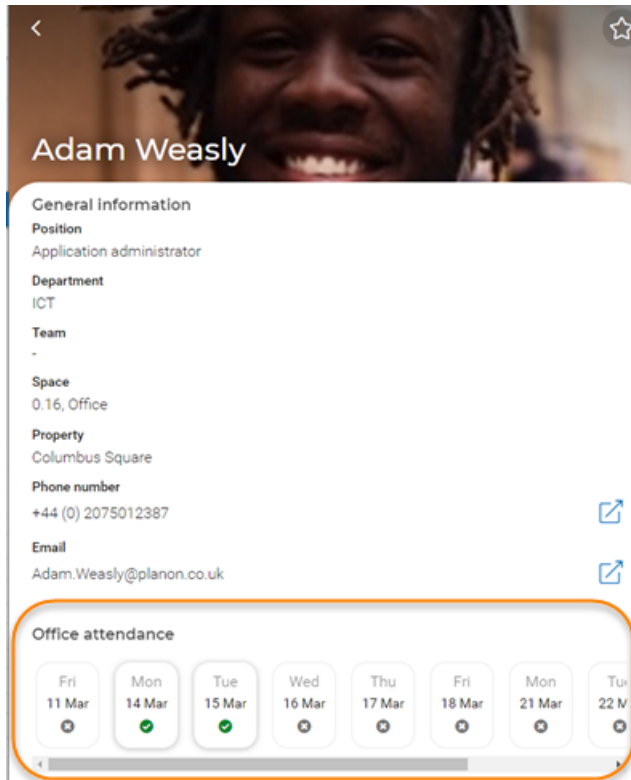


## Displaying 'Office attendance' on a Personnel web definition

You can show an **Office attendance** block on the **Summary** page. On the app, the physical presence of staff (colleagues) in the office is displayed for the next 10 days, through their space or workspace reservations. If app users select a colleague who has one or more room / desk reservations during that 10-day period, the reservation

dates will have a green check mark. App users can tap a check-marked date to see their colleague's reservation details.

**i** For privacy reasons, the display of reservation details can be disabled. This can be done either via the back-office setting **Hide location in app** the **Personnel TSI**, or on the app itself via **Settings > Show privacy info > Show location?**.



## Procedure

1. In the navigation panel in Planon ProCenter , go to Live app > App configuration.
2. Select Personnel on the navigation bar.
3. In the elements panel, select the relevant Colleagues web definition.
4. At the bottom panel, expand the web definition and select the Summary page > Office attendance block.
5. On the data panel, set the Is visible field to Yes.
6. Adjust the title and other field descriptions as required.
7. Click Save.


**The Office attendance block is displayed on the app in the Colleagues module.**


## Configuring 'Inventory' web definitions

You can customize the standard delivered **Inventory** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. The **Inventory** module is used to display the app user's personal inventory items, based upon the **Base Asset** business object in Planon ProCenter . The app users' personal assets are identified via the **Of person** field of an asset.

The **Inventory** web definition consists of two pages:

- The **Start page** consisting of 3 blocks: a **Search** block, a **Filter** block and a **List** block. These blocks enable end users to view, filter and search their inventory items on the app. See also: [Configuring a Filter block on an Inventory web definition](#) for more information.
- The **Summary** subpage with a **My inventory** block and a **Reported orders** block.

 A **Request** action is available on the **Summary** page. Upon tapping the action, the app will only display request forms that are linked to the end user's user group. See [Request forms](#) and [Configuring standard orders for mobile requests](#) for more information on configuring request forms. The label for the corresponding button is translatable.

-  • For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring a Filter block on an Inventory web definition

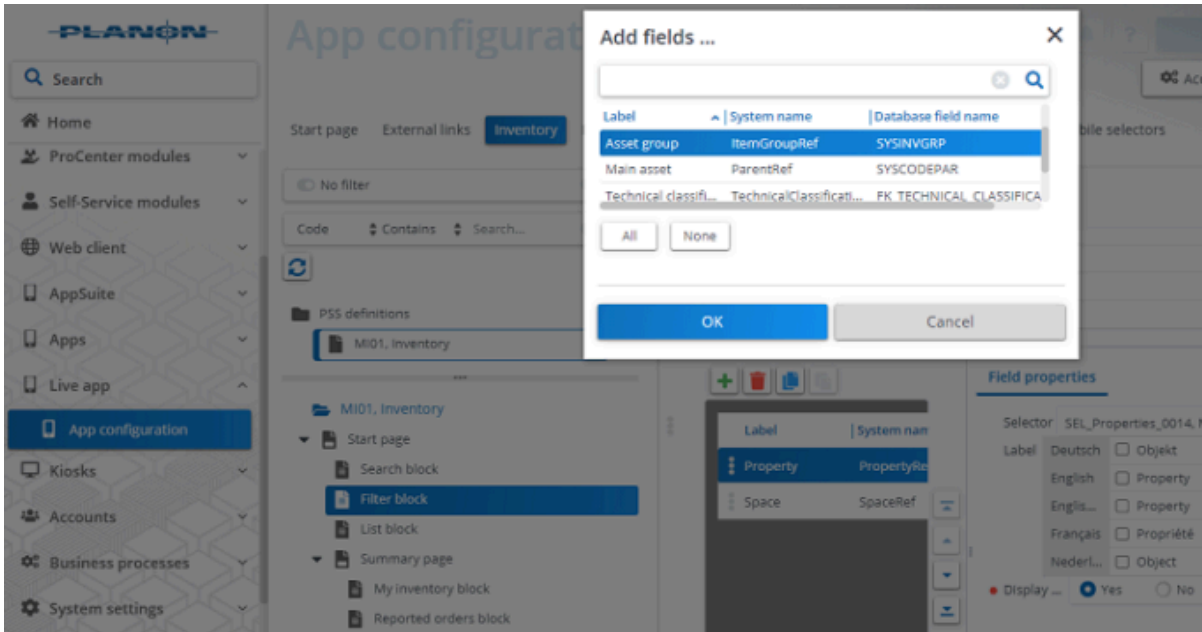
In Planon ProCenter , you can configure filter criteria for app users on the **Inventory** web definition. These filter criteria must be configured separately on the **Filter block** of the start page. The following filter criteria can be configured to search inventory:

- **Alternative classification**
- **Asset classification**
- **Asset group**
- **Main asset**
- **Property**
- **Space**
- **Technical classification**
- any other reference fields listed in the **Add fields ...** pop-up

### Procedure

1. In the navigation panel in Planon ProCenter , go to Live app > App configuration.
2. Select the Inventory on the navigation bar.
3. In the elements panel, select the relevant Inventory web definition.

- At the bottom panel, expand the web definition and select the Start page > Filter block.
- To enable end users to *filter* assets by asset groups, add the Asset group field to the filter block.



- Add other fields as filter options, for example: Asset classification, Space, or any other reference field listed in the Add fields ... pop-up window.

**i** In addition to regular fields, you can also configure **Free fields** of a supported field type and add them to a **Filter** block or **Search** block. If you configure them as a reference field, picklist or Boolean field, you can add them to the **Filter** block. If you configure a free field as a string field, you can make it available on the **Search** block.

- Optional: at Field properties, set the field Display as quick filter to Yes for those fields / filter criteria you want to show at the top of the app users' screen as a preconfigured quick filter button.

**i** The maximum number of quick filters is 5.

The following image shows 3 active quick filters on the app: **Property**, **Space** and a third quick filter that the app user will see when scrolling to the right.





## Inventory

🔍 Search for inventory items



**Desk, electrically adjustable**

TAB002474



**Ergonomic office chair**

ARBO002473



**Headset**

APP0003



Laptop



Bookings



Requests



Scan



**Inventory**




More

## Configuring 'Spaces' web definitions


You can customize the standard delivered **Spaces** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. You can also add a **Spaces** web definition and customize that. End users can use the **Spaces** module on the app to submit service requests for spaces that cannot be booked, for example corridors or storage rooms.

The **Spaces** web definition consists of two pages:

- The **Start page** consisting of 2 blocks: a **Search** block and a **List** block. These blocks will enable end users to view and search spaces on the app.

 Besides regular fields, you can also configure **Free fields** of a supported field type as a string field and add them to a **Search** block.

- The **Summary** subpage with a **Space** block and a **Reported orders** block.

 For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).  
For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring 'Reservations' web definitions

You can customize the standard delivered **Reservations** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Reservations** module on the app to check their previously submitted reservations or to submit a new reservation.

Add / edit a Reservations web definition to enable end users to view their reservation information or add new reservations via their mobile app.

### Procedure

1. Go to Live app > App configuration > Reservations.
2. On the elements panel, select the Reservations web definition, or add a new one via the action panel.
3. In the data section, complete / edit the relevant fields.
4. Click Save.

The Reservation list definition is now created and displayed on the **Web definitions** panel.

Continue to specify the web definition's settings. For a description of the fields, refer to [Reservations web definition fields](#).

5. Click Save.

**The Reservations web definition is added.**

6. Proceed by linking user groups via the action panel and configuring the various pages and blocks on the bottom panel.

The **Reservations** web definition consists of a **Start page** and several *configurable* subpages. These pages include several blocks where most configuration actions can be executed:

- At **Start page**, select whether or not to **Allow TMS card?**, at **Page properties**. This page also includes **My reservations block**, the **Reservation unit action block** and the **Location page**. Here you can:
  - configure the titles of the page / tabs;
  - determine the sequence in which they are displayed using the **Position** field;
  - configure a **Fixed filter**, for example to only show specific types of spaces;
  - change labels of fields, etc.
- **My reservations summary page**, with an **All reservations block**.
  - **My reservation details** page, which includes the **Submit request** and **Adjust** actions. The page also includes a **Reservation details block** where you can add relevant fields to the details page.
- **Workspace unit list page** with a **Search block**, **Mandatory filters**, **Optional filters**, **'Available favourite workspaces' block** and **Available workspaces block**.



- On the **Available workspaces block** block, use the **Floors** field to configure which floors should be available on the app, both in the list as on the floor plan.
- If you apply a fixed filter to the **Available workspaces block**, this filter applies to both the list and the floor plan view on the app.

- For more information on configuring the **Filter block** and quick filters , see: [Configuring 'Optional filters' on a Reservations web definition](#) .
- **Workspace summary page** with a **Workspaces block** and **Facilities** block. To display **Available facilities** on the **Workspace summary page** on the app, select **Yes** in the **Is visible** field on the **Facilities** block.
- **Space unit list page** with **Search block**, **Mandatory filters**, **Optional filters**, **'Available favourite space units' block** and **Available space units block**. See also: [Configuring 'Optional filters' on a Reservations web definition](#) for more information.
- **Space unit summary page** with **Space unit block**, **Today's schedule block**, **Facilities block** and **Reported orders block**: To display **Available facilities** on the **Space unit summary page** on the app, select **Yes** in the **Is visible** field on the **Facilities** block.



- The **Today's schedule block** will show end users all reservations that were already made for the selected space unit, for the current date. You can make this list more specific by configuring a *fixed filter* on this block.
- For every block in the **Reservations** module, you can configure an icon that can be displayed in the header of the block in the Planon Workplace app .



It is recommended to display start and end date-times in the *time zone of the property*, rather than that of the logged-in user. You can configure this on details blocks, by adding date-time fields of the Planon field type *property date-time* (system name

DateTimeProperty) to the layout of the relevant details block. Date-time fields showing the logged-in user's timezone are best removed from the app layout. These can be recognized by Planon field type *transaction date-time* (system name: DateTimeTransaction).

- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring 'Mandatory filters' on a Reservations web definition

In Planon ProCenter > Live app > App configuration, you can make minor edits to the mandatory date-time filter for the **Reservations** web definition.

- The following procedure describes the **Mandatory filters block** configuration for *space units*, but you can use the same procedure for *workspaces*.

### Procedure

1. Select the Reservations tab on the navigation bar.
2. On the elements panel, select the relevant Reservations web definition.
3. At the bottom panel, expand the web definition and select the Space unit list page > Mandatory filters block.
4. To set a maximum number of days for app users to book in advance, select the Block properties tab on the data panel and select the Selected date-time filter field (label: Create reservation from).
5. At Field properties, select the Max. no. of days to book in advance field and enter the relevant number of days allowed for booking in advance.

- Be aware that the value you enter here might be overruled by the value in the **No. of advance reservation days** field that applies to the *reservation unit* (space unit or flexible workspace). This field is available on reservation unit layouts in the **Reservations TSI** in Planon ProCenter . This means that a reservation unit is not displayed in the list of available reservation units if the reservation unit's advance reservation days are exceeded by the number of advance booking days selected on the app. Example: in Planon ProCenter > **Reservations**, the number of advance reservation days for *meeting room Bach* (reservation unit) is set to **3**. On the app (**Reservations** web definition), the maximum number of advance booking days is set to **5**. If app users want to book a meeting room and set their date-time filter to a date that is either **4** or **5** days before the current date, the list of available space units will not display *meeting room Bach* in the list of available rooms.

6. If required, change the translations of the filter label in the Label fields.
7. Click Save.

## Configuring 'Optional filters' on a Reservations web definition


In Planon ProCenter > Live app > App configuration, you can configure several optional filters for app users on the **Reservations** web definition. These filters must be configured separately on the **Optional filters blocks** of space units and/or workspaces. The following filter criteria can be configured to search space units / workspaces:

- **Property**
- **Duration** (space units only)
- **Facilities**
- **Floor**
- any other reference fields listed in the **Add fields ...** pop-up

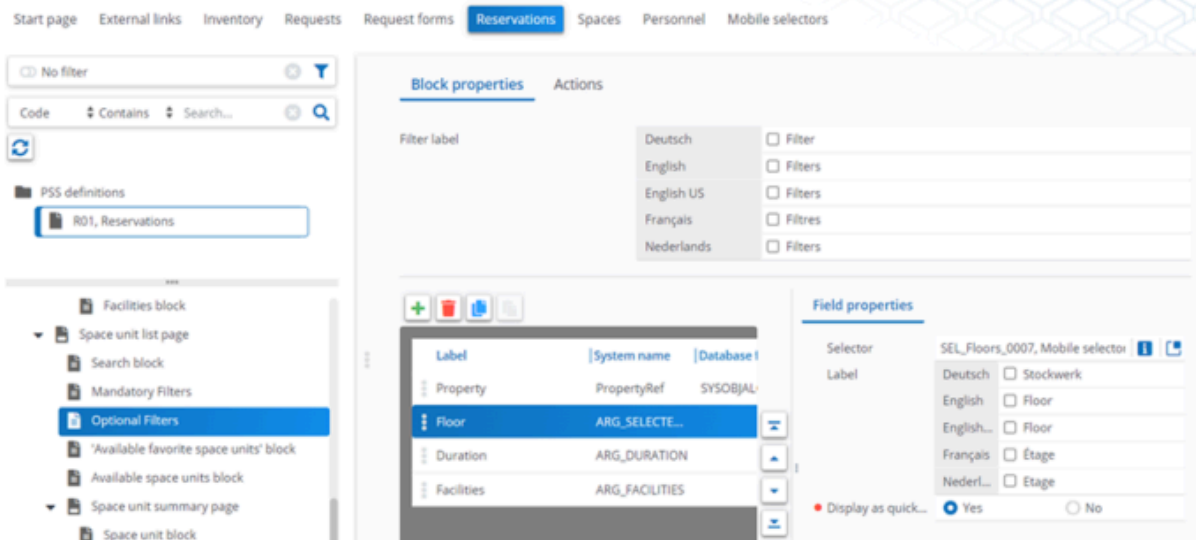
 The following procedure describes the **Optional filters block** configuration for *space units*, but you can use the same procedure for *workspaces*.

### Procedure

1. Select the Reservations tab on the navigation bar.
2. On the elements panel, select the relevant Reservations web definition.
3. At the bottom panel, expand the web definition and select the Space unit list page > Optional filters block.
4. To enable end users to *filter* spaces or workspaces by their available facilities, select the Block properties tab on the data panel and add the Facilities field to this block.
5. Select the Facilities field.
6. At Field properties, make the relevant settings.

 Make sure that the **Mobile selector** for the facilities is configured correctly by going to the facilities' mobile selector **Search block** and setting a fixed filter on **Visible** facilities only.

7. Optional: set the Display as quick filter? field to Yes.
8. To allow the booking of space units for a particular duration, add the Duration field to the filter block of space units. This configurable filter contains a fixed list of duration options.



9. To allow filtering on a specific floor in the list view, and indirectly also in the floor plan (CAD drawing), add the Floor field to the filter block of space units or flexible workspaces.
10. Select the Floor field.
11. At Field properties, make the relevant settings.

**i** Make sure that the **Mobile selector** for the floor is configured correctly by going to the floors' mobile selector **Search block** and adding the **Name** field.

12. Optional: set the Display as quick filter? field to Yes.
13. Add other fields as filter options, for example: Properties or any other reference field listed in the Add fields ... pop-up.

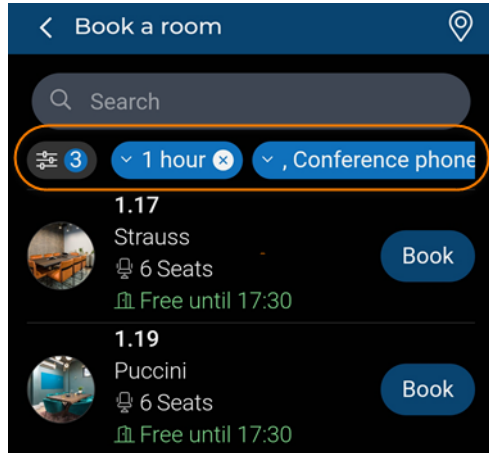
**i** Besides regular fields, you can also configure **Free fields** of a supported field type and add them to a **Filter** block or **Search** block. If you configure them as a reference field, picklist or Boolean field, you can add them to the **Filter** block. If you configure a free field as a string field you can make it available on the **Search** block.

14. Optional: at Field properties, set the field Display as quick filter to Yes for those fields / filter criteria you want to show at the top of the app users' screen as a preconfigured quick filter buttons.

**i** The maximum number of quick filters is **5**.


15. Click Save.

The following image shows the quick filter buttons on the app: **Duration** and **Facilities**.



## Reservations web definition fields

Field	Description
Module settings tab	
Navigation name	Enter navigation labels for this web definition in the relevant languages. These are displayed as module names on the app in the language of the logged-in user.
Code	Enter a code to identify the Reservations web definition.
Description	Enter a name for the Reservations web definition.
Site	Displays the name and code of the site for which you are creating the web definition.
Icon	Select an icon for the web definition.
Space units tab	
Standard order to book space units	From the dialog, select the standard reservation on which the reservation of meeting rooms must be based.
Default time interval	Setting that determines the default duration of the reservation and the intervals of the other options. The options are <i>30</i> or <i>60</i> minutes. If a reservation already exists within one of the intervals then only the possible intervals are shown and the one until the next meeting ( <i>Book until next</i> ). If a meeting coincides with the start time of the next meeting,

Field	Description
	<p>this <b>Book until next</b> option is also shown. This option indicates that the end user cannot extend the meeting. If there are less than 15 minutes left until the next meeting, it is not possible to add a reservation.</p> <div style="border: 1px solid #00a0e3; padding: 5px; margin-top: 10px;">  The default time for creating a reservation is based on the working hours that are related to the property. </div>
Workspaces tab	
Standard order to book flexible workspaces	From the dialog, select the standard reservation on which the reservation of flexible workspaces must be based.
Workspace reservation policy	<p>Select <b>Multiple</b> to allow the same person to book more than one desk / workspace at a time.</p> <p>Select <b>Single</b> to allow the same person to only book one desk / workspace at a time.</p>
Duration workspace booking	<p>Select <b>Whole day</b> to allow booking a desk / workspace for the entire day.</p> <p>Select <b>Time intervals</b> to allow booking a desk / workspace for the configured time interval. Select a time unit in the <b>Time interval workspace booking</b> field.</p>
Time interval workspace booking	Select a relevant time interval from the list. When end users book a desk / workspace the available time slots based on the selected interval are shown, including the one before the next booking. In addition, they can select <b>End of day</b> , which means that they can book the desk / workspace from the selected time until the end of the working day.

## Configuring 'Bookings' web definitions

You can customize the standard delivered **Bookings** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Bookings** module on the app to check their previously submitted bookings (room / desk and asset reservations) or to submit a new booking.

Add / edit a main **Bookings** web definition, to enable end users to view their booking information or add new bookings via their mobile app. After adding this main web definition you must add sub web definitions to cater for the various booking options you want to offer on the app module.



## Procedure

1. Go to Live app > App configuration > Booking.
2. On the elements panel, select the Bookings web definition, or add a new one via the action panel.
3. In the data section, complete / edit the relevant fields.
4. Click Save.

The **Bookings** web definition is now created and displayed on the **Web definitions** panel.

Continue to specify the web definition's settings.

5. Click Save.



If you want to allow automatic check-ins for all bookings made by scanning a QR code within 15 minutes from the booking time, select **Yes** in the field **Allow remote check-in**. This setting also makes the **Check-in** button available.

6. Proceed by linking user groups via the action panel and configuring the various pages and blocks on the bottom panel.
7. Proceed with configuring the pages and blocks of this main web definition (go through the list below). Next, start adding the various *sub web definitions* that are required for the various booking options you want to offer. See Adding a sub to a Bookings web definition, for more information.

The new **Bookings** web definition consists of a **Home page** and several sub pages and blocks. These are instantly ready for use, but can be slightly customized:

- At **Home page > Page properties**, the **Allow TMS card?** field shows whether or not TMS is possible for the selected page. This page also includes the **Upcoming reservations list block**, the **Booking actions block** and the **Alternative options block**. Here you can:
  - configure the translations of titles (page / tabs);
  - add booking actions (for the **Booking actions block** and the **Alternative options block** and link these actions to a sub web definition;
  - add fields to blocks;
  - configure a **Fixed filter**, for example to only show specific types of spaces;
  - change labels and sequence of fields, etc.
- **My reservations details page**, with an **Additional information block** , **Edit reservation** page, **Edit reservation block**, an **Edit time** page.
- **Location** page.
- **Reservation list** page and block.



• For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).

- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Adding the 'Number of people' field to the 'Edit reservation block'

In the **Bookings** web definition, you can add **Number of people** field to the **Edit reservation block**.

### Procedure

1. Select the **Bookings** web definition.
2. On the bottom panel, select the **Edit reservation block** and navigate to the **Edit fields** tab on the data panel.
3. Click **Add fields** button.


**The Add fields ... pop-up appears.**

4. Select the **Number of persons** field and click **OK**.
5. Click **Save**.

**In the Bookings module, the Number of people field is displayed on the Edit reservation page.**

## Adding a sub to a Bookings web definition

After you have added and configured a *main* web definition, you can add *sub* web definitions. **Good to know:** for each type of booking option in your **Bookings** configuration you must configure a separate sub web definition.

 In the **Bookings** web definition, the use of *sub web definitions* is essential. You must at least configure two sub web definitions for the two main booking actions that are offered prominently on the Start page of the app. You can add more sub web definitions for any extra booking options you might want to offer, such a training facilities, office equipment and so on. For the extra booking options, additional configuration is required after you created a sub web definition. See [Configuring alternative booking options](#) for more information.

**Prerequisite:** for each sub web definition that you add, an relevant standard order must be available that can be used to create the actual booking (reservation).

### Procedure

1. In App configuration > Bookings, select the main web definition.
2. On the action panel, click Add sub.
3. Select the business object on which you want to base the sub web definition.

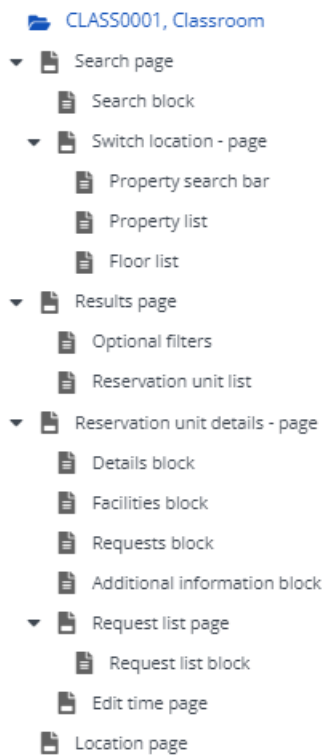
**The reservable business objects include: Asset units, Space units and Flexible workspaces.**

4. On the Module settings tab on the data panel, fill in the fields such as Code, Name, Icon.
5. Select an appropriate **Standard order** for the sub web definition.
6. Click Save.
7. Fill in appropriate Navigation names in the relevant languages.
8. Click Save.
9. **Settings for Space units and Flexible workspaces:** For both types of sub web definitions, you can make settings on the **Preferences** tab.
  - In the field **Maximum number of days ahead** on the **Preferences** tab you can enter a maximum number of days to display ahead in the calendar. The default value is 30.
  - The **Allow floor selection?** field is set to **Yes** by default. The settings allows users to select a floor on the **Search page** and **Switch location - page**. If you want to hide floor selection from these pages, because they are not applicable in your configuration, set the **Allow floor selection** field to **No**.
10. **Additional web definition settings for Flexible workspaces:**
  - If you want to allow booking a desk / workspace for the entire day, select the sub web definition and go to the **Preferences** tab. Set the field **Book whole day** to **Yes**.
  - If you want allow users to book a desk / workspace near a colleague, go to the **Preferences** tab and set the field **Enable booking near colleague** to **Yes**.
  - If you want to allow booking a desk / workspace for the default period, select the sub web definition and go to the **Preferences** tab. Select the default booking period from the list in the field **Default booking period**. The default value is 1 hour.



If the **Book whole day** field is set to **Yes**, the **Default Booking Period** will be hidden.

11. On the web definitions panel, expand the main definition, to display the sub web definitions.
12. Select a sub web definition and navigate to the bottom panel of the web definitions panel. You will see a structure like this:



All pages and blocks are ready for use. You can slightly customize them, by setting **Fixed filters**, adding / removing fields, editing **Field properties** (labels, sorting order) or selecting a different **Position** or visibility for a block, and so on.

Link the sub web definition to a main booking option or to an additional booking option on the **Booking action** block or **Alternative options** block (in the **Booking flow - web definition** field on the **Action properties** tab). Also see [Configuring main booking options](#) and [Configuring alternative booking options](#).

## Adding the 'Number of people' field to the 'Edit Booking' page

In the **Space units** sub web definition, you can add **Number of people** field to the **Edit Booking** page.

### Procedure

1. Select the **Space units** sub web definition.
2. On the bottom panel, select the **Edit Booking block** and navigate to the **Edit fields** tab on the data panel.

3. Click **Add fields** button.

**The Add fields ... pop-up appears.**

4. Select **Number of persons** field and click **OK**.
5. Click **Save**.

In the **Bookings** module, **Number of people** field is displayed on the **Edit Booking** page.

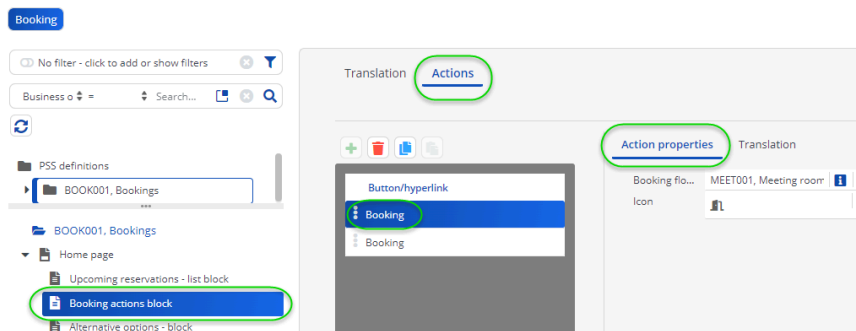
## Configuring main booking options

For the **Bookings** module, you can configure the display of *two* main booking options on the Start page of the app. Each can have its own distinct booking flow. For example: an option to book a flex desk and an option to book a meeting room.

Prerequisite: Two relevant sub-web definitions must be created, each with an appropriate standard order.

### Procedure

1. In App configuration > Bookings, select the main web definition.
2. At the lower web definition panel, select the Booking actions - block.



3. On the data panel, enter translations in the **What do you need?** field in accordance with your preferences.
4. In the panel below, add a main **Booking** option, by clicking the plus button.
5. Select the booking option to configure a main booking flow.
6. On the **Action properties** panel, in the **Booking flow web definition** field, select the sub web definition you want to use for the booking option.

**For example an 'space unit-based' web definition, for an option to book a meeting room or a 'flexible workspace-based' web definition to book a flex desk.**

7. In the Icon field, select an appropriate icon for the booking option.
8. In the **Label** field, change the translations of the booking option as required.
9. Click Save.
10. Repeat this procedure for the second main booking option.

**Two main booking options become available on the app's Bookings module, at the top of the start page.**

## Configuring alternative booking options

If you want to offer extra booking options in addition to the two main booking actions, use the following procedure.

Prerequisite: create a relevant *sub web definition* and *standard order* for each extra booking option you require.

### Procedure

1. In App configuration > Bookings, select the main web definition.
2. At the lower web definition panel, select the Alternative options - block.
3. On the data panel, enter translations for the **Alternative options**, as required.
4. In the panel below, add an extra booking option, by clicking the plus button
5. Select the option to configure its booking flow.
6. On the **Action properties** panel, in the **Booking flow web definition** field, select the sub web definition you want to use for the extra booking option.

**For example an 'asset-based' web definition, for an option to book office equipment; or a 'space unit-based' web definition for an option to book a classroom.**

7. In the Icon field, select an appropriate icon for the booking option.
8. In the **Label** field, change the translations of the extra booking option as required.
9. Click Save.
10. Repeat this procedure for each additional option you need (the maximum is 9).

**The extra booking options become available on the app's Bookings module, at the bottom of the start page.**

## Configuring 'Requests' web definitions

You can customize the standard delivered **Requests** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Requests** module on the app to check their previously submitted requests or to submit a new request.

The **Requests** web definition consists of a **Requests list page** and a **Summary page**. These configurable pages include several blocks:

- The **Request list page** consisting of 3 **List blocks**. These blocks will show the **Reported requests**, **Requests in progress** and **Closed**

**requests** of the logged-in user on the app. See [Configuring the List blocks in Requests](#) for more information on configuring these blocks.

- The **Summary page** will display a summary of a selected request on the app.
- The **Request details block** can be configured to display basic information about user requests on the app. The request details that are displayed either come from a specific mobile request form or, if that is not available, from a linked standard order or the default data from the **Requests** module.
- The **Create request** action. See [Configuring standard orders for mobile requests](#) for more information on configuring the standard orders that should be displayed for this action.



- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring the List blocks in Requests

The **Requests** list blocks represent three different order statuses and therefore each require a slightly different configuration.

The list blocks in this *Accelerator*-based example can be configured to show requests on the app that either are **Reported**, **In progress** and **Completed**.

### Procedure

1. On the navigation panel, go to Live app > App configuration and select the Requests module.
2. Select the Requests web definition you want to configure, or create a new one.
3. On the data panel, go to the field **Show requests grouped by order group**. Set this field to **Yes**, if you want the available requests to be shown on the app grouped by order group. Set the field to **No** if you want to show the available requests in a plain list (shown in alphabetical order).
4. Select List block 1 from the bottom elements panel on the left.
5. Go to List fields on the data panel.
6. In the Is visible field select Yes.
7. Go to the Fixed filter field.

**The macro ( *Requestor = &PERSON* ) is already filled in.**

- To this existing macro, add the name and code of a relevant *Reported* status that exists in your configuration. For example: AND (Status In RQ10, Reported).

( (Requestor = &Person) AND (Status In RQ10, Reported) )

- In the Title field, add a relevant title for the list block.
- Add additional fields to the list block as required.
- Click the Save button at the bottom right.
- Select List block 2.
- Repeat steps 4-10 for this block.

Only now, in the Fixed filter field, add: **AND (Status In RQ30, In progress)**, or the name and code of a relevant **In progress** status that exists in your configuration.

( (Requestor = &Person) AND (Status In RQ30, In progress) )

- Select List block 3.
- Repeat steps 4-10 for this block.

Only now, in the Fixed filter field, add: **AND (Status = RQ40, Completed)** , or the name and code of a relevant **Completed** status that exists in your configuration.

( (Requestor = &Person) AND (Status = RQ40, Completed) )

Requests are shown on the app in 3 different categories, according to their status.



You can use different macros than the ones on the list blocks to create different categories. For more information on using macros, see the *Fundamentals* user documentation.

## Configuring 'Visitors' web definitions

You can customize the standard delivered **Visitors** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. App users can use the **Visitors** module to register visitors.

The **Visitors** web definition consists of four pages:

- The **Visitor list** page with a **List** block that enables app users to view scheduled visitors.
- The **Visitor details** page with a **General information** block that enables app users to view the visitors details.
- The **Add visitor** page with an **Add visitor** block that enables app users to add new visitors.
- The **Edit Visitor** page with an **Edit** block that enables app users to edit visitor details.





- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Configuring a custom floor plan for the app

The floor plans displayed in the Planon Workplace app are by default based on multi-layered CAD drawings. If your CAD drawings include many layers and hatched blocks, these floor plans might take quite long to load on the app. They may also lack information that is particularly convenient for app users. In that case, you might consider configuring and linking a customized version of the floor plan.

Planon supports the possibility to combine a CAD drawing with a background image. You can use this feature when creating a custom floor plan for the Planon Workplace app .

Creating an accurate custom floor plan that will only display spaces and workspaces includes the following main steps:

- In AutoCAD, create a simplified version of the relevant CAD drawing. This version can subsequently be used to create an accurate background image. When uploaded as FM drawing, the new, simplified drawing will be combined with the custom background image. See steps 1-3.
- Export the drawing to PDF format; the PDF file is used as the basis for a background image. See steps 4-5.
- Open your preferred drawing tool to edit the floor plan and save the PDF file to PNG format. See steps 6-8.
- Upload the PNG image as **CAD background image** to Spaces & Workspaces > Floor attributes. See steps 9-11.
- Configure / position the background image in CAD Integrator view. See steps 12-15.

### Procedure

1. To define and export the outlines for the drawing, open your floor plan drawing in AutoCAD > Autodesk.

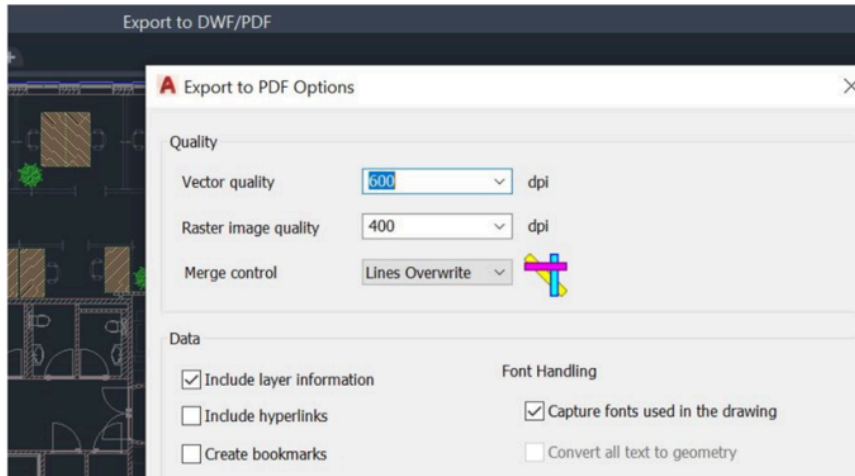


Decide if the outlines of spaces and desks must be displayed by the FM drawing or by the background image you are about to create. If you keep outlines in both, any misalignment between the background image and the CAD drawing will be quite noticeable. If you want to make the CAD lines invisible in Autodesk, go to **Layers** and set their transparency to 90. If you want to make the lines invisible in the background drawing, apply the background's transparency when you are editing the background file (see step 7).

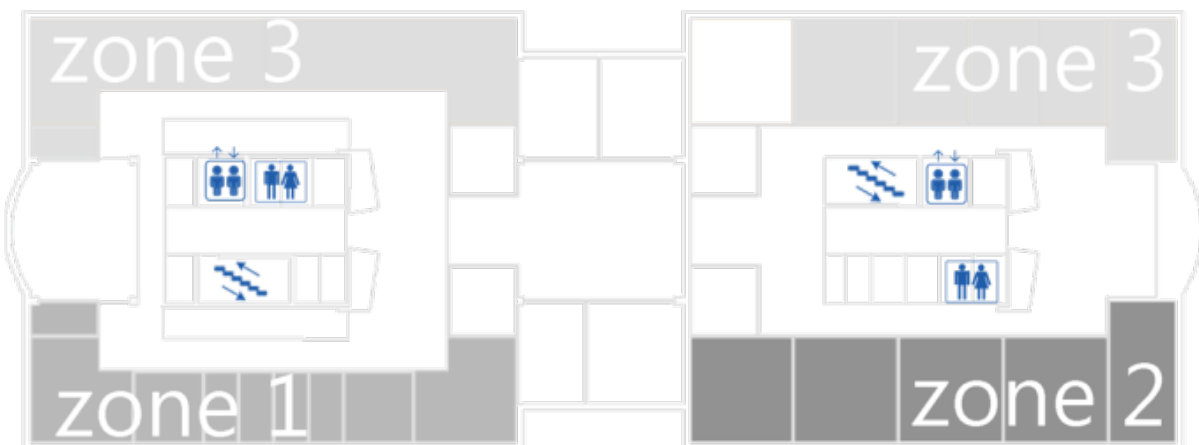
2. Make sure that the layers defining the floor, spaces and workspaces are *enabled for printing*, by selecting the printer symbol.

This includes layers with information required to draw your background image, the floor polylines, the space polylines, and optionally (if you are going to use them in your background drawing), the workspaces.

3. Disable any irrelevant layers for printing.
4. Select Print to PDF.
5. Select the following options:



6. Open the PDF file in your preferred drawing tool.
7. Edit the drawing, for example by marking out zones or neighborhoods on the floor plan and making outlines transparent. You might also want to add useful information about the location of lifts, stairs and toilets. See the following example:



It is recommended to only use light colors for your edits, such as grays. You can also use patterns. This ensures that the red and green markers for occupancy remain clearly visible.

8. Save the file to PNG format.
9. Open Planon ProCenter .

10. Go to Spaces & Workspaces > Spaces > Floor attributes.
11. In the CAD background image field, upload the PNG file you just created.

**If the field is not displayed, ask your administrator to add it to the Floor attributes layout. Also see [Displaying drawings](#) and [Floor attribute fields](#).**

12. Go to Components > Floors.
13. With CAD Integrator view enabled, select the floor that corresponds with the drawing.
14. From the CAD Integrator drop-down menu, select Configure background image.
15. Position the background image as required and select Save background image from the drop-down menu.

**The position is saved in the Position field on Floor attributes. The custom floor plan (with configured background image) can now be displayed on the Planon Workplace app .**

# PMFS Live app - Work assignments module configuration

In Planon ProCenter > Live app > PMFS (Live app) > Work assignments you can customize the PMFS Live app to your needs, by configuring the **Work assignments** web definition.

The **PMFS Live app** works 'out-of-the-box', but can be customized further in the Live app > PMFS (Live app) TSI, by authorized users of **Planon ProCenter**. The configured **Work assignments** module will enable field engineers to work on site from an up-to-date list of work assignments.

Upon selecting a work assignment from the list, the field engineers get access to detailed information. Next, they can accept their work assignments and select appropriate actions that enable them to keep the back-office up-to-date while they are working at their remote location.

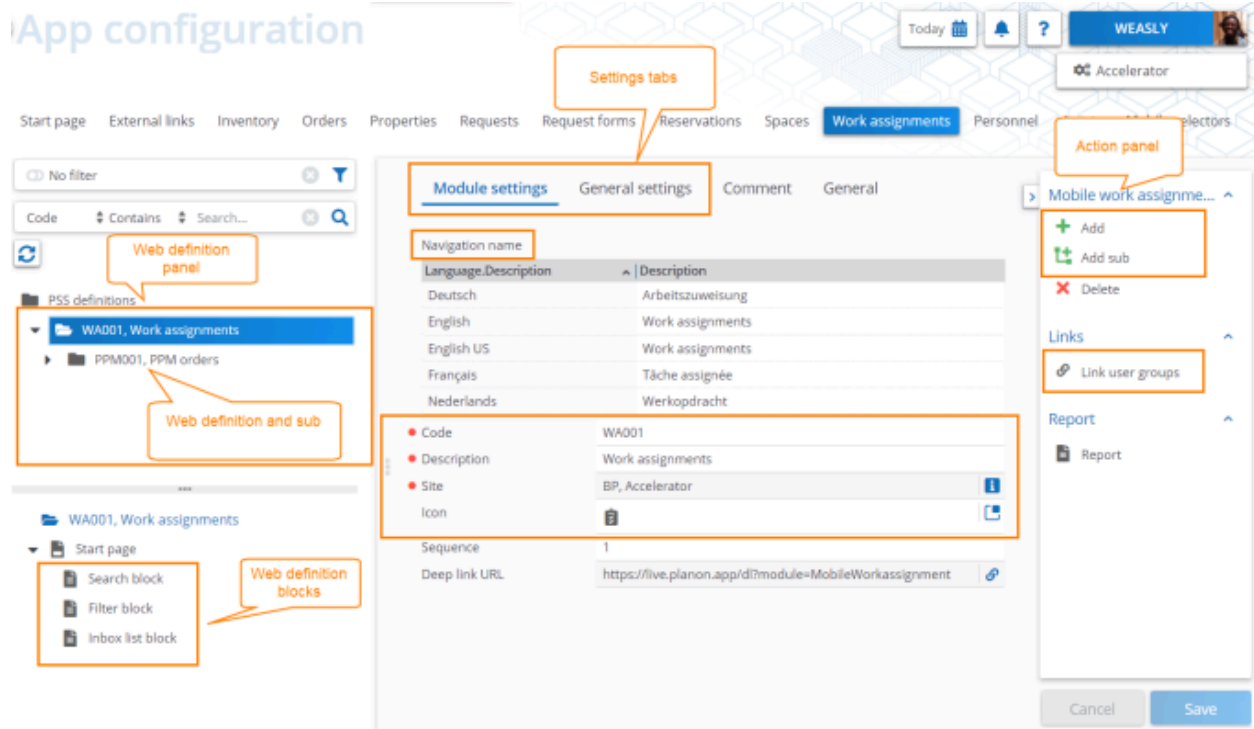


It is not possible for users to access **Work assignments** if the person linked to their user account is also linked to another user account.

With every action the engineers select or feature they use, essential time and cost related information is updated and sent to the back-office. Since internet connection cannot always be guaranteed, the module supports working *offline*. The job-related information is saved on the device until internet connection is restored. Technically, working offline is supported by so-called 'mobile envelopes'. See [Mobile envelopes and working offline](#).



For more information on configuring user-defined business objects such as PPM orders or work orders in Planon, see the Field definer user documentation. For more information about the **Work assignments** business object in Planon, see [Work assignments](#) in the Planon WebHelp.



## PMFS Live app features

The **PMFS Live app** is intended for field service engineers / technicians. The app facilitates fast and intuitive maintenance job handling, health and safety procedures to ensure compliance, registration of time and materials, documentation and customer sign-off. The solution seamlessly integrates with Planon's comprehensive back-office functions where work is recorded, planned, allocated and monitored.

## Making PMFS Live app - Work assignments ready for use

In order to be able to work with the configured PMFS Live app > **Work assignments** you must make some settings that allow for the creation of **Mobile envelopes**. The envelopes will make the work assignments that belong to an order available on the PMFS Live app. Mobile envelopes (one for each work assignment) will carry messages between app and back-office and prevent information loss in off-line situations.

The following is required if you want to make the solution work on the PMFS Live app .

- To start with, obtain the appropriate *solution license* and link it to the PMFS Live app . Ask your Planon contact person for more detailed information. The solution license is required to make the **Work assignments** module available on the app.

- Set up the **Event connector admin** account to be able to send outbox messages to the mobile device. See Event Connector: [Requirements](#).
- For monitoring purposes and resolving synchronization issues, add the TSIs listed in [Mobile envelopes - working offline](#) to the navigation panel of the responsible Planon administrator(s).
- Proceed with the following procedure.

## Procedure

1. Go to Accounts > User groups, and verify if the PMFS Live app solution license is linked to the relevant user group.

**This is the user group with the people (individual tradespeople or team members) who are going to use the app: the field engineers.**

2. Navigate to User group details > Users and select the user whom you want to allow receiving work assignments in the PMFS Live app , instead of **Planon AppSuite**.
3. Navigate to Settings > User settings.
4. On the data panel, select **Yes** in the **Enable work assignment 'envelopes'?** field. For the creation of 'team envelopes' it is important that all team members have this setting set to **Yes**.

**This setting is used to check if the individual app user is allowed to receive work assignments on the PMFS Live app . When set to Yes, the selected user will receive 'work assignment envelopes' in that app. Also, from that moment, this user will no longer be able to receive work assignments (jobs) in Planon AppSuite.**

5. Click **Save**.
6. Go to the navigation panel and select Business processes > Field definer.
7. From the Business objects elements list, select the Work assignments business object .
8. On the action panel, select Under construction.
9. On the action panel, select Business object settings.

**The Work assignment settings dialog box opens. The PMFS Live settings tab displays the PMFS Live order types for envelopes setting.**

10. In the Work assignments settings dialog, select Link order types on the action panel.
11. In the Link order types dialog, select the user-defined order types that must be available for linking to the web definitions in the Work assignments app module, for example Order and PPM order.

**Only work assignments belonging to the selected order types will have envelopes created in the PMFS Live app.**

12. Move the selected order types to In use.
13. Click OK and Close.
14. On the action panel, select Completed.

The 'mobile envelopes' functionality is now activated for the selected users and order types. Proceed with [Adding the Work assignments selection step to the App configuration TSI](#).

## Good to know: limits applied in the PMFS Live app

For reasons of usability and to ensure a good performance, several limits have been applied to the app. These limits apply to the retrieval and display of mobile envelopes and records in the **PMFS Live app**.

In the following cases a maximum applies:

1. A maximum of 100 'envelopes' can be received by and displayed on the app. See [Mobile envelopes and working offline](#) for more information about envelopes.
2. Most reference fields accessed on the app can show a maximum of 100 records in the list of values to choose from. Exceptions: the **Property**, **Space** and **Asset** reference fields.
3. A maximum of 100 maintenance activities can be displayed for a PPM order.
4. A maximum of 100 checklist items can be displayed for a single maintenance activity.
5. On a **Suborder** page, the maximum number of standard orders that users can link is 20. This number might be supplemented with any 'sibling' orders configured for standard orders. These siblings include standard suborders and standard orders to which the 'applicability' principle applies. See also: [Defining a standard order's applicability](#).

## Configuring the app

The following sections explain how you can customize the app to your requirements.

### Adding the Work assignments selection step to the App configuration TSI

#### Procedure

1. On the navigation panel, go to ProCenter modules > TSIs.
2. On the elements list, select AMM-PMFS - App configuration.

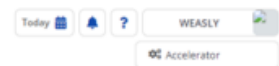
3. Click the padlock icon to set the TSI under construction.
4. With the App definitions selection level selected, on the data panel ribbon, click the plus icon after the existing selection steps.
5. In the Add or remove steps dialog, under Available, select the MobileWorkassignment\_Step, move it to Selected and click OK.
6. Click the padlock icon again to set the TSI to Completed.

**the selection step is available in the App configuration TSI, for further customization.**

## Adding a Work assignment web definition

Precondition: the **Work assignments** selection step is added to the Live app > PMFS (Live app) configuration TSI.

### PMFS (Live app)



1. Go to the Work assignments selection step > Module settings tab.
2. On the action panel, click Add.
3. On the data panel, enter a Code and Description.
4. Click Save.



In the Planon Live app, you can only add one web definition of this type per property set.

Proceed with making some general and module settings for the new web definition that will become available as a new module on the Planon Live app.

## Module settings and general settings

After you have added a web definition you can make some module settings and general settings for the app.

### Procedure

1. Go to the Module settings tab.
2. Add Navigation names in multiple languages.
3. Select an appropriate Icon.
4. In the Sequence field, select the app module's position on the app navigation bar.
5. Go to the General settings tab.



6. In the Communication logs (PMFS actions) field, select the relevant type of communication log to store the results from PMFS actions.

See [Action and reason configuration](#) for more information on PMFS actions.

7. In the Communication logs (Sign-off) field, select the relevant type of communication log to store the transactions related to signing off on the app.
8. In the Communication logs (comments) field, select the relevant type of communication log to store comments on the order.
9. In the Communication logs (images) field, select the relevant type of communication log to store photo and image files.
10. In the Communication logs (documents) field, select the relevant type of communication log to store document files.
11. In the Communication logs (tradesperson's notes) field, select the relevant type of communication log to store personal notes made by a tradesperson / engineer whilst working on a work assignment or maintenance activity.
12. In the **Counter type (add reading)** and **Gauge type (add reading)** fields, select the meter type for which you want to allow adding meter readings via the app. For further information about configuring the **Add meter readings** action see: [Configuring Details pages and blocks - generic and specific settings](#) .
13. In the Only download images and files via Wi-Fi? field, select Yes if you only want to allow image / file downloads via Wi-Fi connections.



With regard to *session expiration* and accessing and downloading (secure) files and images, you can prevent files from becoming inaccessible to app users after their user session ends by generating *resource keys*. For more information, see: [System settings > Security - Access to Planon features via encrypted keys](#).

14. In the Total file size limit per envelope (MB) field, select the maximum file size in MB that you want to allow for downloading files per work assignment (envelope).
15. In the Allow simultaneous work on multiple assignments? field select Yes if you want to allow field engineers to start work on multiple work assignments simultaneously. If you do not want to allow this, select No.
16. Click Save.

**Proceed with linking user groups and configuring the Start page.**

## Linking user groups and configuring the Start page

This procedure includes the last steps in the configuration of the main web definition.

## Procedure

1. Go to the Work assignments selection step and select the Work assignments web definition.
2. On the action panel, click Link user groups and select the relevant user group(s) for this web definition.
3. Click OK.
4. At the bottom panel, select and expand Start page.
5. Select Search block.
6. On the data panel, select the Search fields tab and edit the available settings and fields, as required.

**The selected fields are the search criteria that can be used in the Search bar on the app. By default, the Code and Description fields of the order and the work assignment are selected.**

7. Select Filter block.
8. On the data panel, select the Block properties tab and edit the available settings and fields, as required.
9. On the Field properties tab, edit the settings as required: Label and Display as quick filter?.

**Selected fields are displayed as quick filter buttons at the top of the mobile's screen. Users can activate / deactivate them with a single tap.**

10. For order-related reference fields, a default mobile selector is available in the Selector field. You can replace it by a custom selector as required.



For more information about mobile selectors, see [Mobile selectors and reference fields](#).


**The selected fields are the criteria that can be used in the Filter bar on the app. By default, the order's reference fields Property, Space, Asset ID and User-defined type are selected for filtering.**

11. Select List block.

**This block lists the work assignments on the app.**


12. On the data panel, select the List fields tab.
13. In the Primary header field, select either Order description or Work assignment description as the primary header on the app's start screen.
14. Edit the other available settings and fields, as required.
15. On the data panel, select the Location tab.
16. In the Location separator field, select the character you want to display on the app as separator between the various parts of the location description. A comma is selected by default.

17. Select the fields that specify the location details on the app; adjust their sequence as required.

 For order-related reference fields, a default mobile selector is available in the **Selector** field. You can customize this selector, by opening it and modifying the settings and fields on the relevant blocks.

18. On the data panel, select the Displayed date-time tab.
19. Select the field(s) on which you want to base the *date-time* information that is displayed on the **All** and **To do** tabs, on the Work assignment overview page.

See [Work assignments overview](#) to see what it looks like on the app.


 The date-time fields you can select here are either related to the order (**Requested completion time (property)**, **Requested date-time to attend (property)**, **Requested date-time to fix (property)** or **Requested date-time to fix (property)**) or to the work assignment (**Planned start date-time**). If you configure several date-time fields on the app, their values will be checked and displayed on the app in a logical order. Be aware that only one date-time is displayed per work assignment and that the sequence of the fields configured here (plus the field being populated on the **Order / Work assignment**) determines which one is displayed on the mobile device.

20. Click Save.

Proceed with adding a sub web definition.

## Adding a sub to a Work assignment web definition

After you have added and configured a *main* web definition, you can add one or more *sub* web definitions; one for each order type that is required in your PMFS configuration.

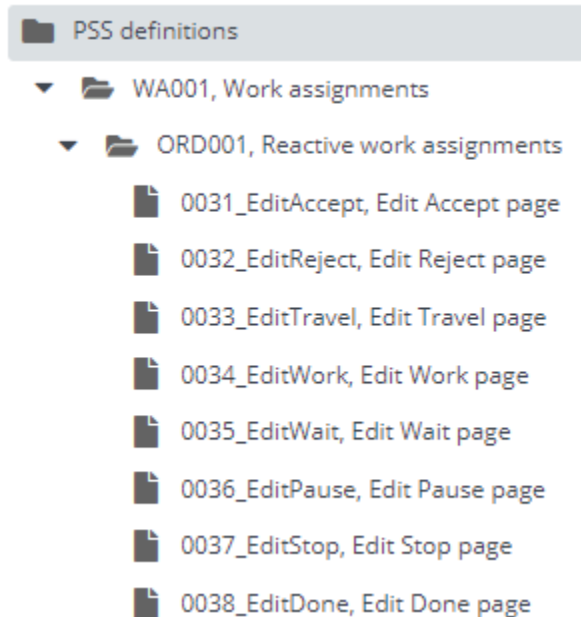
 In the **Work assignments** web definition, the use of *user-defined Orders* is essential. The configured user-defined orders ensure that work assignments of different order types can be displayed differently on the app. To achieve this, you must configure a *sub* web definition per required user-defined order type.

In addition, you can customize the pages that are displayed for each *status transition* on the app. In the following procedure, the sub web definition is based on a PPM order (user-defined order type).

### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the main web definition.
2. On the action panel, click Add sub.
3. Select the user-defined order type on which you want to base the sub.
4. On the Module settings data panel, fill in the fields such as Code, Name, Icon.
5. Click Save.

6. Fill in appropriate Navigation names in the relevant languages.
7. Click Save.
8. On the web definitions panel, expand the sub, to display the Edit web definitions for status transitions.



9. Select an Edit web definition, for example the Edit Reject page and make settings as required (for example: add navigation names and select an icon).
10. Click Save.
11. To further customize the corresponding Edit details pages, navigate to the bottom panel and select the relevant details pages and corresponding blocks.

**Most Edit details pages have a Work assignment details block and a Communication log details block, though some, such as the Edit Stop page and the Edit Done page, have specific, additional blocks. See [Configuring 'Edit' pages for status-related actions](#) for more information.**

The sub web definition is added for the selected user-defined order type. If another order type is required on the app, repeat this procedure for that order type. Next, proceed with configuring the sub definition's **Summary page** (page properties and status transitions).

## Making checklist settings for a PPM web definition

By default, it is not possible to complete a maintenance activity on the app if there is at least one *mandatory* checklist item that has not been acknowledged by the field engineer. However, you can unblock this default setting. A second additional setting enables you to change the default status for unacknowledged checklist items upon completing the maintenance activity.

On the **Additional settings** tab of the sub web definition, two settings are available that you can use to implement your preferences regarding completing checklist items and completing the work assignment.

#### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant PPM sub web definition.
2. On the data panel, select the **Additional settings** tab.

Both settings related to handling checklist items are displayed:

- Block maintenance activity completion with unanswered mandatory checklists?
  - Set checklist items to 'Done' on work assignment completion?
3. In the **Block maintenance activity completion with unanswered mandatory checklists?** field, select **No** if you want to allow engineers setting a maintenance activity to **Completed** while some mandatory checklist items still need to be acknowledged.



If you select **No** here, the **Set checklist items to 'Done' on work assignment completion?** field can no longer be set to **No**.

4. If you want to set unacknowledged checklist items to **Done** instead of **Not assessed** (which is the default behavior) when the field engineer sets the *work assignment* to **Done**, go to the **Set checklist items to 'Done' on work assignment completion?** field and select **Yes**.

**Summarizing: The two checklist settings are partly co-dependent. Whatever your setting preferences, the following combinations of selected values are allowed:**

- **Yes - No,**
- **No - Yes,**
- **Yes - Yes.**

**The only combination that is not supported is No - No.**


## Configuring 'Edit' pages for status-related actions


You can make it possible, or even mandatory, for field engineers to *add* additional information when they select a new action on the app (such as **Work**, **Travel**, **Wait** and so on). Selecting a new action on the app causes a status change for the work assignment, which is communicated to the back-office, together with the added information.

The field engineers can add their additional information via 'Edit' pages. These are text boxes that can be configured for each action on the app. To be precise: on the

destination status ('To' status). For example, all status transitions that move to **Work** will get the same **Edit 'Work'** form on the app.


You configure the **Edit [...]** pages by hiding / displaying fields, and/or making them mandatory or read-only. Commonly used fields are **Action date-time** (the start of the status transition), **Comment** or **Reason**.

 For the app to function properly, it is strongly recommended not to remove all fields from **Edit [...]** pages. Some fields are protected from removal, because they are vital to the workflow / process. Sometimes, these fields also have a fixed position on the block's

layout. Pinned fields can be recognized by this icon: 

#### Examples of Edit [...] page configuration:

- If field engineers start work on a different date-time than the original date-time provided on the work assignment, you can allow them to adjust the **Action date-time** (start date-time) upon selecting the status **Work**.
- If field engineers complete their work, you might want to make the **Action date-time** read-only.
- If field engineers select the **Travel** status, you can allow them to specify a **Action date-time** and an expected arrival date-time.
- If field engineers select the **Wait** status you might want them to specify a **Reason**.
- If field engineers select the **Discontinue** (Stop) status on the app you might want to make it mandatory for them to specify a reason before the work assignment is returned to the back-office.
- If field engineers cannot complete the work assignment themselves and want to directly allocate it to another team member, without redirecting to the back-office, you can allow them to select the **Reassign** status. When they reassign the work, they will go through the signing off procedure themselves, while a new work assignment is created and immediately reassigned to the selected team member. The edit form that belongs to the **Reassign** action can be configured, for example by adding fields, changing labels and changing other settings.
- If field engineers are required to complete a *work-related questionnaire* before they start their work, you can configure this for the status **Work**. Similarly, this can be configured for the statuses **Temporary fix**, **Travel** and **Done**.

 At the bottom panel, the **Edit details pages** for the statuses **Work**, **Temporary fix**, **Travel** and **Done** all include a **Questionnaire details** page. This page is a reference to a '*Questionnaire - Work assignment*' scope which can be configured in the **Questionnaires** TSI. The scope ensures that a **work-related questionnaire** is displayed at an appropriate point in the work flow, i.e. when the engineer selects an applicable work assignment status on the app. See: for more information. The questionnaires themselves must also be configured in the **Questionnaires** TSI.

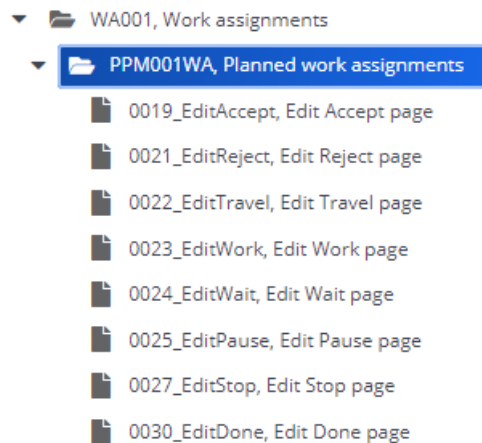
- etc.

## Procedure

1. In App configuration > Work assignments, select and expand the relevant sub web definition.

**Edit [...]** pages are displayed for every available action (status transition) in the sub web definition:

- **Accept**
- **Reject**
- **Travel**
- **Work**
- **Wait**
- **Pause**
- **Stop**
- **Temporary fix** (Note: only for sub web definitions that are not based on a PPM order)
- **Done**
- **Reassign**



2. Select the Edit [...] page you want to display and / or configure.
3. At Module settings, set the Navigation name, Code, Description and Icon as required.
4. At the bottom panel, select the Edit details page.
5. In the data section, on the Page properties tab, edit the page properties as required.
6. Select Work assignment details block.

7. On the data panel, select the Edit fields tab and edit the available settings with regard to visibility, position and icon, and add fields, as required.

- On the Edit details pages > Work assignment details blocks, the **Is visible setting** is *read-only*, to avoid breaking work flows on the app, like for example being able to confirm that all work has been completed on the **Edit 'Done'** page.
- The **Work assignment details blocks** for the **Reject, Reassign, Wait, Pause** and **Stop** statuses have the **Action date-time** and **Reason** fields configured by default. Actions and reasons must be configured in Planon ProCenter , see [Action and reason configuration \(MM and PMFS\)](#).

8. If available on the web definition, like on the Edit 'Reject' page for example, select the Communication log details block.
9. On the data panel, select the Add fields tab and edit the available settings and fields, as required.
10. Repeat the procedure for any of the other Edit [...] pages, as required.

**The Edit 'Stop' page includes the configuration for the Engineer's overview details page on the app. This is the page that engineers get to see before they sign off. Edit the page properties as required, by adding additional field or adjusting field settings on the corresponding Work assignments details block.**

11. The Edit 'Done' page and Edit 'Temporary fix' page include the sign-off procedure for the engineers and, optionally, their customers. This is explained separately. See Configuring the Engineer's overview and Sign-off pages.
12. Click Save.

**The configured edit options for field engineers become available on the app.**

## Configuring the Summary page and status transitions

When PMFS Live app users tap on a work assignment on the **Start** page, they will navigate to the corresponding **Summary** page. On this **Summary** page they can accept the work assignment and select any subsequent actions (status transitions), such as **Travel, Work, Wait, Pause** etc. These status transitions are of crucial importance for the labor hour registration.

The following procedure explains how the **Summary** page and the available status transitions can be configured for a **Work assignments** sub web definition. For information about specific settings on the various blocks of a **Summary** page, such as **Order, Asset, Meters** etc., see the introduction of [Configuring Details pages and blocks - generic and specific settings](#) .

- With regard to [key work assignments](#) that do not belong to a PPM order, the following applies: the **Temporary fix** status transition is available as subsequent status after **Travel, Wait, Work** and **Pause**. If the engineer selects this status, the back-office is provided with realistic information on the work assignment that is not actually completed yet, but is provided with a temporary solution.




## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the Summary page.
3. On the data panel, select the Page properties tab and edit the settings as required.
4. Select the Status transitions tab.


**A list of possible status transitions is displayed. These are configurable.**

5. Edit the settings for each status transition as required.

**Here you decide whether the status transition should be displayed (Is visible field), edit the Label and link an Edit page (Edit definition field).**

 If you do not configure an edit page for a status transition, then it becomes a 'simple' status transition. This means that the status transition will happen on the app without any edit options. Be aware that no labor hours are created upon selecting simple status transitions!

6. On status transitions that move towards **Stopped**, **Temporary fix** and **Done** there is an additional setting: **Allow an 'Action date-time' in the future?** If you want to allow app users to end their work assignments on a date that is past the current date-time, set this field to **Yes**, for the selected status transition.

 This setting is not available for status transitions that move from **Assigned** or **Accepted** to **Stopped**, **Temporary fix** and **Done**.

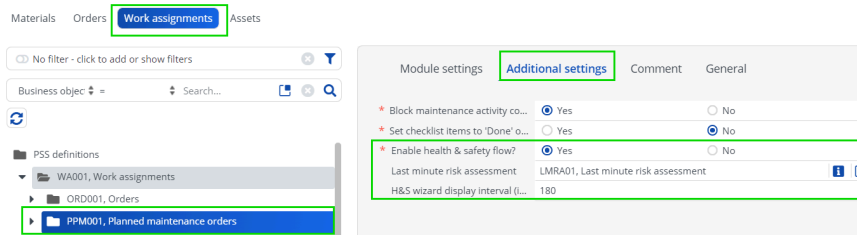
7. Click Save.
8. Proceed with configuring the available pages and blocks: Configuring the Work assignment page and blocks.

## Configuring generic Health and Safety settings

In order to make the **Health and Safety** block and details page available to app users, you must activate the health and safety flow and make other settings.

### Procedure

1. On the navigation panel, go to **Live app > PMFS (Live app)**.
2. Select the **Work assignments** selection step.
3. On the PSS definitions panel, select the sub web definition of the order type for which you want to make the health and safety settings, for example the web definition for *PPM orders*.
4. On the data panel, select the **Additional settings** tab.



5. In the **Enable Health & Safety upon starting work?** field, select **Yes**.

**Activating this setting will guide app users through a flow of available health and safety checks and questionnaire when they select the **Work** action for a PPM order.**

6. Optional: select a last minute risk assessment in the **Last minute risk assessment** field that you want to display on the web definition's order type; in this example PPM orders.

**The questionnaire you select here will always be included during the **Start work** flow, if the order is subject to health & safety checks.**

7. In the **H&S wizard display interval (in min.)** field, enter the number of minutes after which a field engineer should repeat the H&S procedure, for example due to a work interruption (status **Pause** or **Wait**).

**The default interval is 60 minutes. The maximum is 1440.**

8. Click **Save**.
9. Repeat this procedure for any other sub web definitions (order types), as required.


**The configured settings will from now on apply to all orders (Orders, PPM orders, Move orders) whose **EHS required** field is set to **Yes**. If any health and safety regulations or checks apply to an order, such as: permits, (last minute) risk assessments, method statements, hazards or work-related activity types and any linked questionnaires, these will be presented via the H&S 'wizard'.**

10. When going through the H&S flow, app users must either accept or decline the presented H&S checks. The system will check permits for validity and questionnaires for blocking answers. The combined user actions and system checks will determine if the work can be started safely, or not at all. Notifications will make this clear to the app user. See Health and Safety in the PMFS Live app for information about additional configuration options for the 'Start work' flow and the H&S details pages.

## Configuring the Work assignment page and blocks


On the **Work assignment** page you configure the display of the various blocks for **Communication logs, Order, Work assignment, Assets, Observations, Meters,**

**Tradesperson's notes, Health & safety, Location, Labor hours, Related orders and Materials** on the app.

 If the user-defined order type that is linked to the sub web definition is not a planned maintenance order, these blocks are displayed directly under the **Summary > Work assignment** page and also include an additional **Assets** block, **Observations** block and **SLA** block. For web definitions based on a planned maintenance (PPM) order, some blocks must be configured on the **Maintenance activity** page.


### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select and expand the Summary page.
3. Select the Order block.
4. On the data section's Details fields tab, edit the block settings (Title, Is visible, Position, Icon, No information fields).
5. At the bottom panel, add / delete order fields, or adjust the field sequence.

 If you add a reference field to a block, be aware that this field might only 'work' when the app user is online, because not all reference fields are supported for offline use. In those cases, users will receive a message that the app can only retrieve data when they are online.

6. On the Field properties tab, edit Field properties as required.
7. Click Save.
8. Successively, select any of the other blocks that are in need of configuration: Communication logs block, Work assignment block, **Health & safety** block **Tradesperson's notes** block, Location block, **Asset** block, **Meters** block, Observations block, Labor hours block, Materials block, **Related orders** block.
9. Edit the settings and fields of these blocks as required.

**See step 4-7 for the general edit options.**

 On the **Communication logs** block you can enter translated titles for each communication log's *micro block* on the app: **Comments**, **Images**, **Documents** or **No information**. The micro blocks will also display a count on the app, to make clear to the user how many comments / images / documents are available.

Proceed with configuring the **Communication logs details**, **Work assignment details**, **Order details**, **Location details**, **Labor hours details**, **Materials details** and (if applicable for the order type) **Asset details** pages and blocks. Also note that for navigation from **Asset details** to any asset-related observations, the **Observations** block and the **Mobile observations** app module must be made available on the app.

## Configuring free fields on Add blocks and Edit blocks

In PMFS Live, the **Free fields** you can configure on **Add** blocks and **Edit** blocks is restricted to a few types.

If you intend to configure **Free fields** on editable blocks (**Edit** blocks **Add** blocks) in the PMFS Live app , only the following field types are supported:

- String / Text
- Big decimal
- Date neutral

## Extending the Property search scope on the Asset block

On the **Asset** block of a work assignment, app users can **Change** an asset, provided that the related sub web definition is not based on a PPM order. By default the search scope is limited to the app user's property, but you can extend the search options using a setting on the asset selector.

### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.



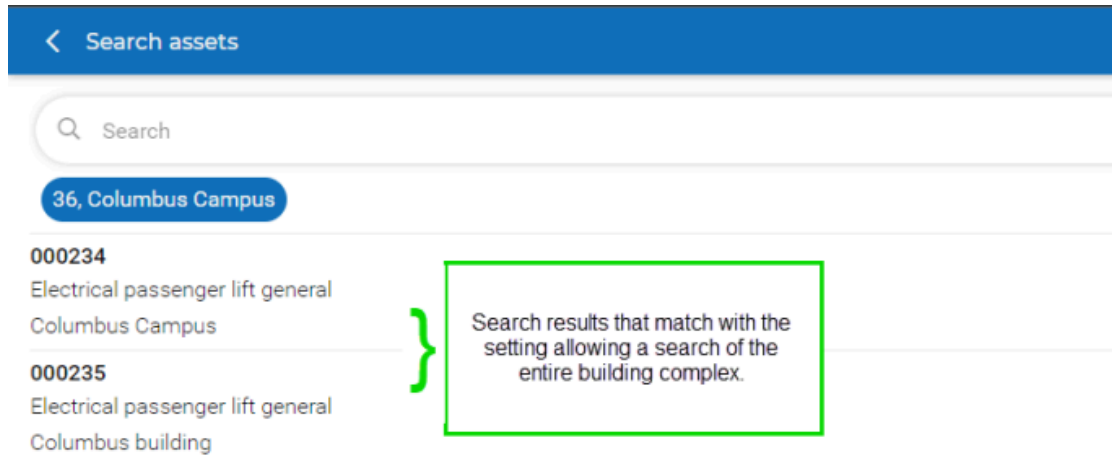
The sub web definition should not be linked to a PPM order.

2. At the bottom panel, select and expand the Work assignment page.
3. Select the Asset block.
4. On the data panel, on the Details tab, go to the Add / change 'Asset selector' field and click Select a value.
5. In the Add / change 'Asset selector' dialog, select the Filter block of the relevant mobile selector.
6. On the Block properties tab, select the Property field (system name *PropertyRef*).
7. In the Filter options section, expand the drop-down in the Allow additional search options? field.

#### **Not allowed is the default setting.**

8. Select the relevant option:
  - Not allowed
  - Include 'Complex' properties
  - Include subproperties
9. Click Save, followed by OK to close the dialog.

The search scope is adjusted accordingly on the app for this sub web definition. In the following example the option **Include 'Complex' properties** is selected, so assets from the entire complex are listed (in this case there are only two):



## Configuring Details pages and blocks - generic and specific settings

On the PMFS Live app , a **Details** page is displayed if the app user selects a block on the app's **Summary page**. The following table lists these blocks and any special additional configuration options that are worth mentioning:

Blocks on Summary page	Configuration information and options for Details page
<b>Order</b> block	Options to configure <b>Details</b> fields. Non-configurable <b>Details</b> action. This action allows app users to further drill down to the <b>Orders</b> details page and specific blocks.
<b>Work assignment</b> block	<ul style="list-style-type: none"> <li>Options to configure <b>Details</b> fields.</li> <li>Non-configurable <b>Details</b> action. This action allows app users to further drill down to the <b>Work assignments</b> details page and specific blocks.</li> </ul>
<b>Health &amp; safety</b> block	<ul style="list-style-type: none"> <li>Option to show or hide this block.</li> <li>Non-configurable <b>Details</b> action. This allows app users to further drill down to the <b>Health &amp; safety</b> details</li> </ul>

---


## Blocks on Summary page

## Configuration information and options for Details page

page and specific blocks for: **Permits, Activity types, Hazards, Method statements** and **Risk assessments**. Each of these blocks can give access to further details pages containing configuration options, for example for **Documents, Images** or **Hazards logs (Hazards details page)**.

### Location block

- Options to configure **Details** fields.
- Configurable **Get directions** action. Field engineers can use this action to open a device native 'Map application' to get directions to the specified location, based on the longitude/latitude, or on address information.


 The Planon application will provide the latitude and longitude information of the property. However, if this data is not available in the system and the navigation results depend solely on the address data of the property, the 'map' application can only provide a reliable route if this address data is complete (address and zip code).

### Asset block

Configurable **Add, Change** and **Confirm asset** actions, to allow app users to add and edit asset information and give them the possibility to check if they are working on the right asset or not. See also: [Adding / changing / confirming an asset](#).

### Meters block

Additional **Add meter reading** action, to enable adding **Meter readings**.

 To make it possible to add meter readings on the app, the required meter reading types (counter or gauge) must also be specified on the main Work assignment web definition, on the **General settings** tab. See [Module settings and general settings](#).

### Observations block

Option to display observations for an asset. App users can also add new observations via this block. There is a navigation link between this

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## Blocks on Summary page

**SLA** block (non-PPM orders only)

**Materials** block

**Communication logs** block

**Labor hours** block

## Configuration information and options for Details page

**Observations** block and the **Mobile observations** app module, provided you have configured both on the app.

Option to display the **Temporary fix and continue** action).

Activate the setting **Display order lines** to enable ordering materials without using the Planon **Products** catalog. With the order lines setting activated, app users can order materials by adding new order lines or edit existing order lines.


Activate the setting **Display requisition lines** if you want to enable requesting materials from the Planon **Products** catalog. The requisition lines functionality becomes available on the app.

You must enable at least one of these two settings, but you can enable both.

If you enable **Display requisition lines**, also refer to [PMFS Live app - Materials module configuration](#) for more information on configuring the complementary **Materials** app module. **Good to know:** App users will also be able to add requisition lines without selecting a product from the product list (*non-product requisition lines*), in case the materials they need are not listed. See [Configuring Add, Edit and Delete actions for requisition lines](#) for the configuration of **Add**, **Edit** and **Delete** actions.

Option to display communications logs (**Comments**, **Images** and **Documents**) added to the order. Good to know: for PPM-based work assignments, maintenance activity-related communication logs can be configured on the **Maintenance activity** page. See [Configuring the Maintenance activity page](#).

Displayed on the app under **Time spent**, distinguishing between various types of labor hours such as **Travel**, **Work** and **Wait**). You can also configure options for the **Edit labor hours** and **Add labor hours** pages and blocks. See below.


 The **Action date-time** of actions that are used to calculate labor hours (after each status transition), is based on the time zone of the *property* that is linked to the work assignment.

---

## Blocks on Summary page

## Configuration information and options for Details page

The app displays *running* labor hours, so the **Time spent** block on the app is updated with each status transition.

 If you remove a status transition that is used to calculate labor hours, the auto-running and -tracking of labor hours no longer works. In that case, any labor hours must be added manually by the app users. When doing so, it is important that they do not enter overlapping date-times, to ensure a reliable time registration.

### Related orders block


Option to display blocks with related orders that were **Last reported**, **Last completed** and **Next planned** for the asset from the order that the engineer is currently working on.

### Checklist items block (PPM orders only)

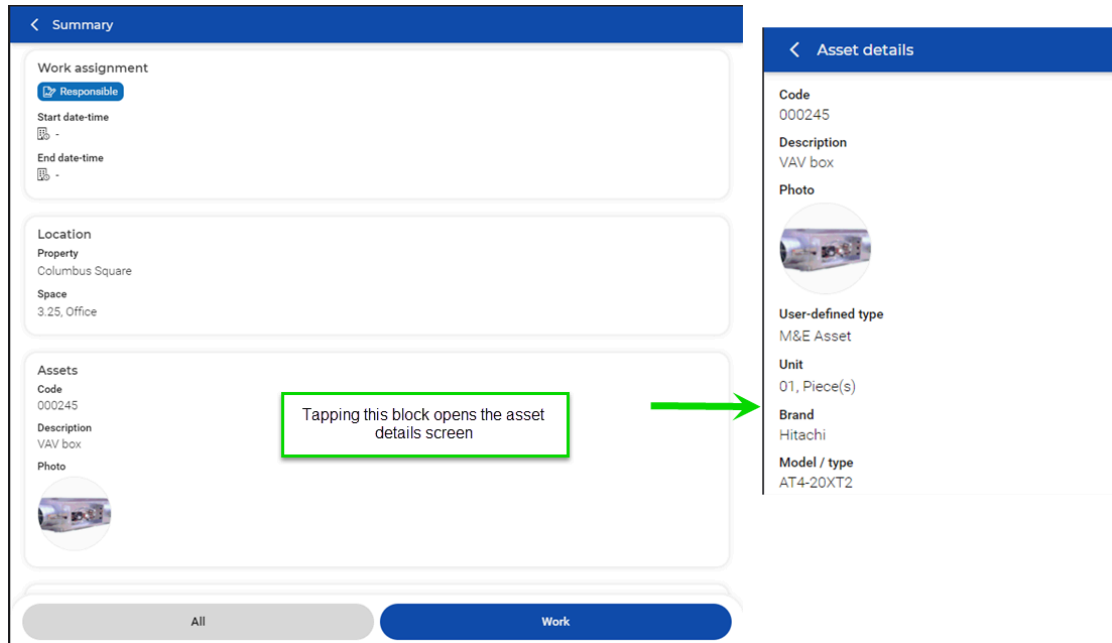
Option to display the checklist items for a PPM based work assignment.

---

The following image shows a **Details** page, in this case for an asset related to an order. The procedure explains how you can configure the **Details** pages and blocks for most order types.

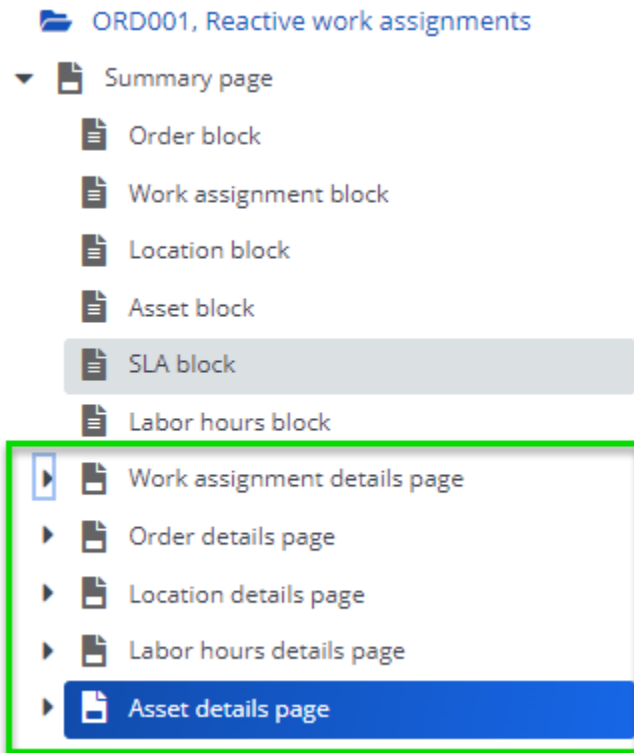
 If the sub web definition is linked to a planned maintenance order, start with configuring the **Maintenance activities page** and its blocks / the **Maintenance activity page** and then proceed with their respective **Details** pages and blocks. See: [Configuring the Maintenance activities page](#), [Configuring the Maintenance activity page](#) and [Configuring details pages and blocks \(PPM orders\)](#).





## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select and expand the relevant details page (see the list above for the various types).




3. In the data section on the Page properties tab, edit the settings as required.
4. Click Save.
5. Go to the Work assignment details page > Work assignment details block.
6. Select the Details fields tab and edit settings and fields as required.
7. Select the Actions tab and make settings for the Reassign action.


**This action is configured as being visible by default, but you can hide it here, if you do not want to allow direct reassigning of work on the app. If required, you can also change the Label or select a different Edit definition.**

8. Select the Work assignment details page > Linked work assignment details block.
9. Select the List fields tab and edit settings and fields as required.

**This list shows end users details about all work assignments that belong to the related order. It also shows which work assignments are *key* (Responsible button), *high priority* or an *appointment booking* (Appointment button) .**

## My assignment details

 Appointment

 Responsible


### Code

00000057

### Description

PPM order reported 2021-1

### Start date-time

 6/3/2022 16:00

### End date-time

 -

### Comments

-

## Details of linked assignments

### Catherine, North


Start date-time  6/3/2022 16:00

End date-time  -

System status 02, Assigned →

### Matt, Emmerson

Start date-time  6/3/2022 16:00

End date-time  -

System status 02, Assigned →

10. On the other sub details pages (see image), select and view the corresponding details blocks.
11. On the Details fields tab, edit the settings and fields as required.



The **Labor hours details page** also includes an **Edit labor hours** details page and block and an **Add labor hours** details page and block, where you can configure labor hour related fields that you want to be available for editing or adding on the app. **Internal tradesperson, Start date-time, End date-time** and **Hour type** are default fields that cannot be removed. These editing options are available on the app for work assignments in the **Travel, Work** and **Wait** statuses. For information on configuring the registration of labor hours for external workers see [Configuring external labor hour registration](#).

12. Click Save.

## Configuring Edit and Delete actions for order lines

The following actions can be enabled on the app for **Order lines**:

- The **Edit** action for order lines can be made visible on the app via the **Actions** tab at: **Summary** page > **Materials** details page > **Used materials** details page > **Order lines** details block. This action is typically used to enable adjusting a pre-filled quantity to a quantity that was *actually* used.
- The **Delete** action for order lines can be made visible via the **Actions** tab at: **Summary** page > **Materials** details page > **Used materials** details page > **Order lines** details block. This action will only work for order lines that app users have added themselves, on the device, and which have not yet been finalized (that is: the back-office has not yet set the **Finalized?** field on the order line to **Yes**).

### Procedure

1. On the navigation panel, go to PMFS Live app.
2. Select the **Work assignments** module.
3. Select the relevant web definition and sub web definition.
4. In the bottom section of the **PSS definitions** panel, select the details page or block for which you want to enable an action. See the list above.
5. On the data panel, select the **Actions** tab.
6. Set the **Is visible** field to **Yes**.
7. Click **Save**.

The selected action is enabled on the app.

## Configuring Add, Edit and Delete actions for requisition lines

The following actions can be enabled on the app for **Requisition lines**:

- The **Edit** action for requisition lines can be made visible on the app via the **Actions** tab at: **Summary** page > **Materials** details page > **Used materials** details page > **Requisition lines (Used)** details block. This action is typically used to enable adjusting a pre-filled quantity to a quantity that was *actually* used.
- The **Add a non-catalog product** action for requisition lines can be made visible via the **Actions** tab at the **Add requisition line** details page. This action is typically used to enable ordering of non-catalog / non-stock products during work.
- The **Delete** action for requisition lines can be made visible via the **Actions** tab at: **Summary** page > **Materials** details page > **Required materials** details page > **Requisition lines (Required)** details block.

This action will only work for requisition lines which app users have added themselves on the device and which are still in the **Reported** status.

### Procedure

1. On the navigation panel, go to PMFS Live app.
2. Select the **Work assignments** module.
3. Select the relevant web definition and sub web definition.
4. In the bottom section of the **PSS definitions** panel, select the details page or block for which you want to enable an action. See the list above.
5. On the data panel, select the **Actions** tab.
6. Set the **Is visible** field to **Yes**.
7. Click **Save**.

**The selected action is enabled on the app.**

## Configuring a Delete action for communication logs

You can configure a **Delete** action on the app for **Comments**, **Images** and **Documents**. Enabling **Delete** actions will allow field engineers to delete any comments, images and/or documents they have added themselves on the device. To enable these actions, the respective **Is visible** setting must be set to **Yes** on the Work Assignments web definition.

### Procedure

1. On the relevant sub web definition in the Work assignments web definition, navigate to the **Communication log details** page.
2. Select the **Comments details** block, **Images details** block and / or **Documents** details block respectively and - per item - make the following setting to enable the **Delete** action.
3. Select the relevant block and navigate to the **Actions** tab on the data panel.
4. Select the **Delete [...]** action.
5. At **Action properties**, set the **Is visible** field to **Yes** and click **Save**.

**The Delete action is now available on the app.**



For a sub web definition that is based on a PPM order, **Delete** actions can also be configured on the **Maintenance activity page > Activity communication logs - details page**, for the **Image details block** and the **Document details block**.

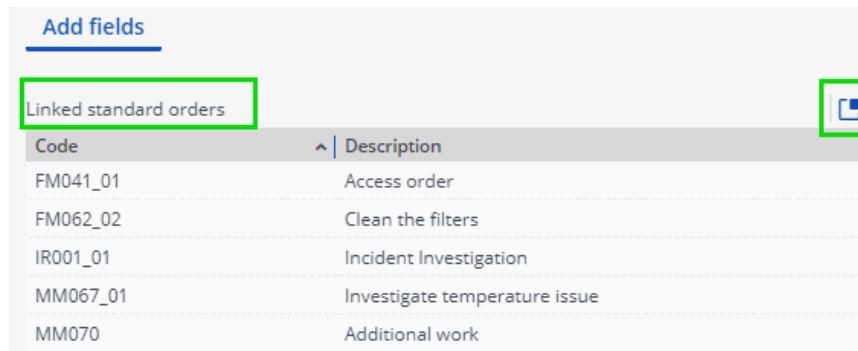
## Configuring the standard orders list on the 'Add suborders' details block

If you want to enable the creation of suborders on the PMFS Live app , you must configure a list of standard orders on the **Add suborder details block**. The list of standard orders on the app is assembled from two sources:

- The standard orders that you link via the pop-up in the **Linked standard orders** field in Live app > PMFS (Live app) > Work assignments. This is a static list that is always shown on the app. It is recommended to link at least one standard order here, as a fallback mechanism. See the procedure below.
- Additionally, and only if filled in: the value from the **Standard order** reference field on the current order, which results in a dynamic listing of standard orders on the app. If the current order is a 'main' order, the list of standard orders shown on the app will include the main standard order and all its subs. If the current order is a 'sub', the list of standard orders on the app will include the current standard order and all of the sub's 'sibling standard orders'.

## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the **Add suborders details block**.
3. At **Add fields**, in the **Linked standard orders** field, select the relevant standard order(s) that you want to display on the app.



You require at least one linked standard order, for the **Add suborder** functionality to work properly.

4. Click **Save**.

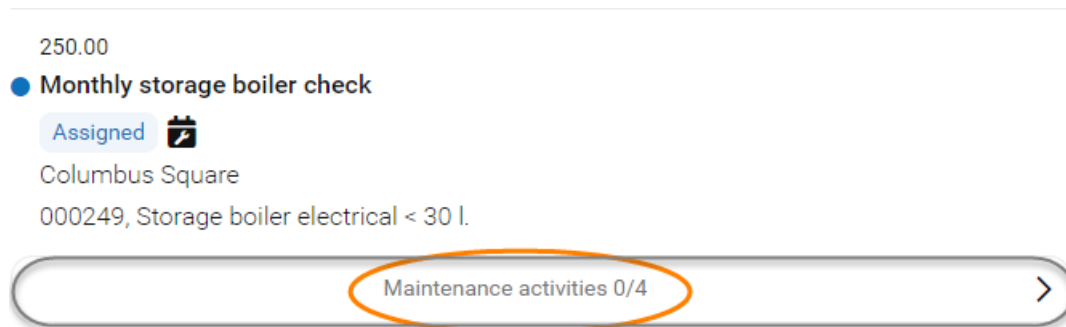
When app users add a suborder via the **Summary** page, the configured list of standard orders is displayed on the app's **Add sub order details** page. For information on how to add a suborder on the app, see [Adding a suborder](#).

## Configuring the Maintenance activities page

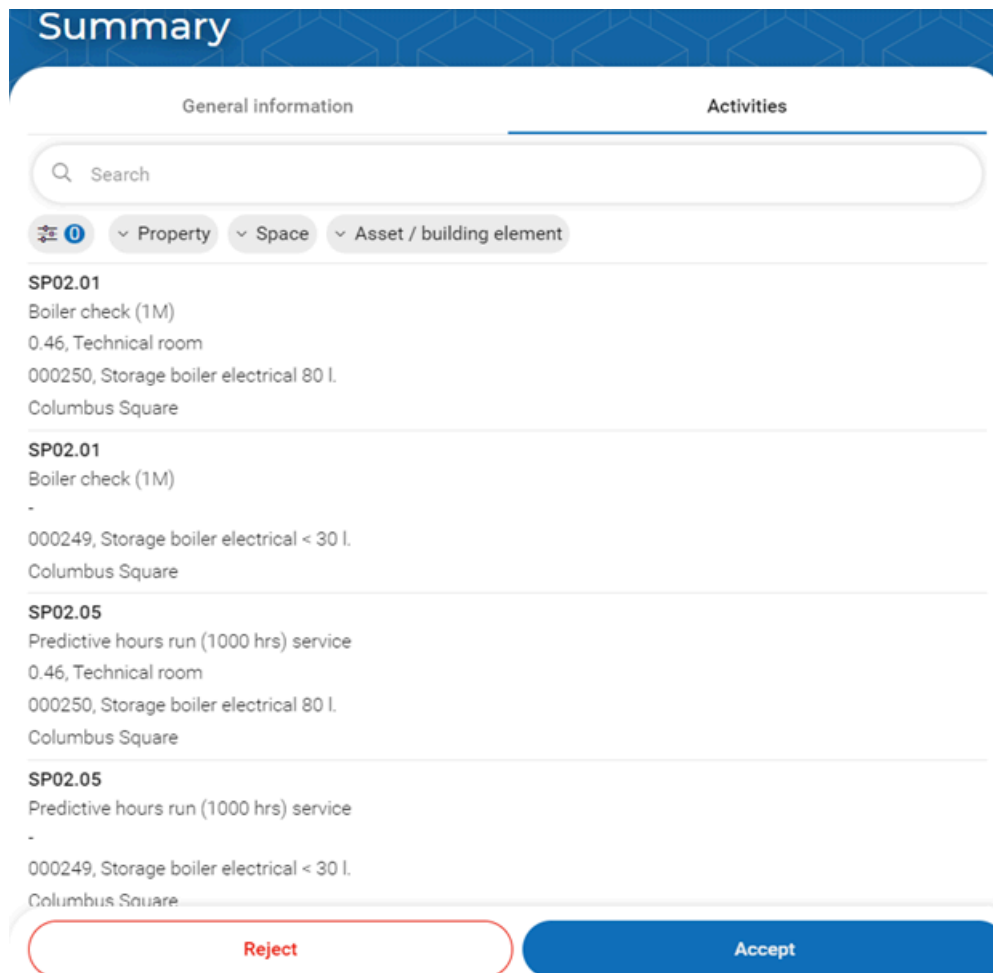
A work assignment might be linked to a single maintenance activity or to multiple maintenance activities. To support both cases, there are two different pages on the

PMFS Live app that you can configure: the **Maintenance activities page** and the **Maintenance activity page**.

In case maintenance activities are linked to a work assignment, the **Start page** shows the number of maintenance activities linked to the selected work assignment.



Clicking the **Maintenance activities** ../. button directs the user to a summary page that displays the **Maintenance activities page**.



The following procedure is about configuring the **Maintenance activities page** and its 3 blocks:

- **Search**
- **Filter**
- **List.**

## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the Maintenance activities page.
3. Select Search block.
4. On the data panel, select the Search fields tab and edit the available settings and fields, as required.

**The selected fields are the search criteria that can be used in the Search bar on the app. By default, the Code and Description fields of the maintenance activity are selected.**

5. Select Filter block.
6. On the data panel, select the Block properties tab and edit the available settings and fields, as required.
7. On the Field properties tab, edit the field settings as required: Label and Display as quick filter?. In the Selector field, a default selector is available. You can replace it by a custom selector as required.

**The selected fields are the criteria that can be used in the Filter bar on the app. By default, the order's reference fields Property, Space and Asset / building element are selected for filtering.**

8. Select List block.
9. On the data panel, select the List fields tab.
10. At the bottom of the data panel, add, delete or edit fields for the list block.
11. Click Save.

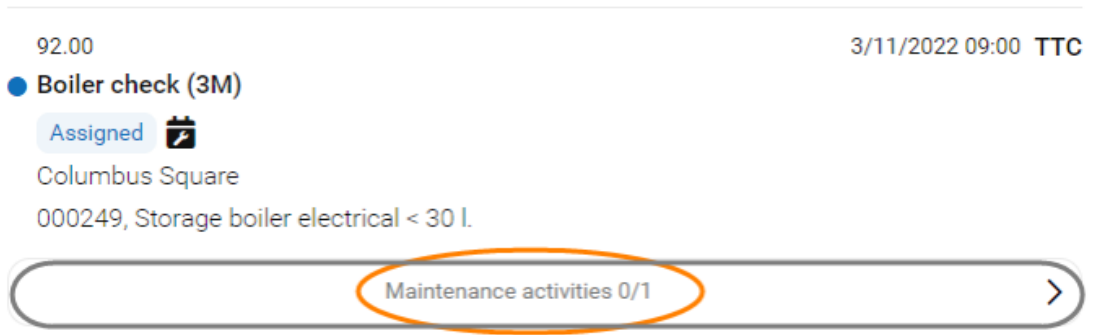
Proceed with [Configuring the Maintenance activity page](#).

## Configuring the Maintenance activity page

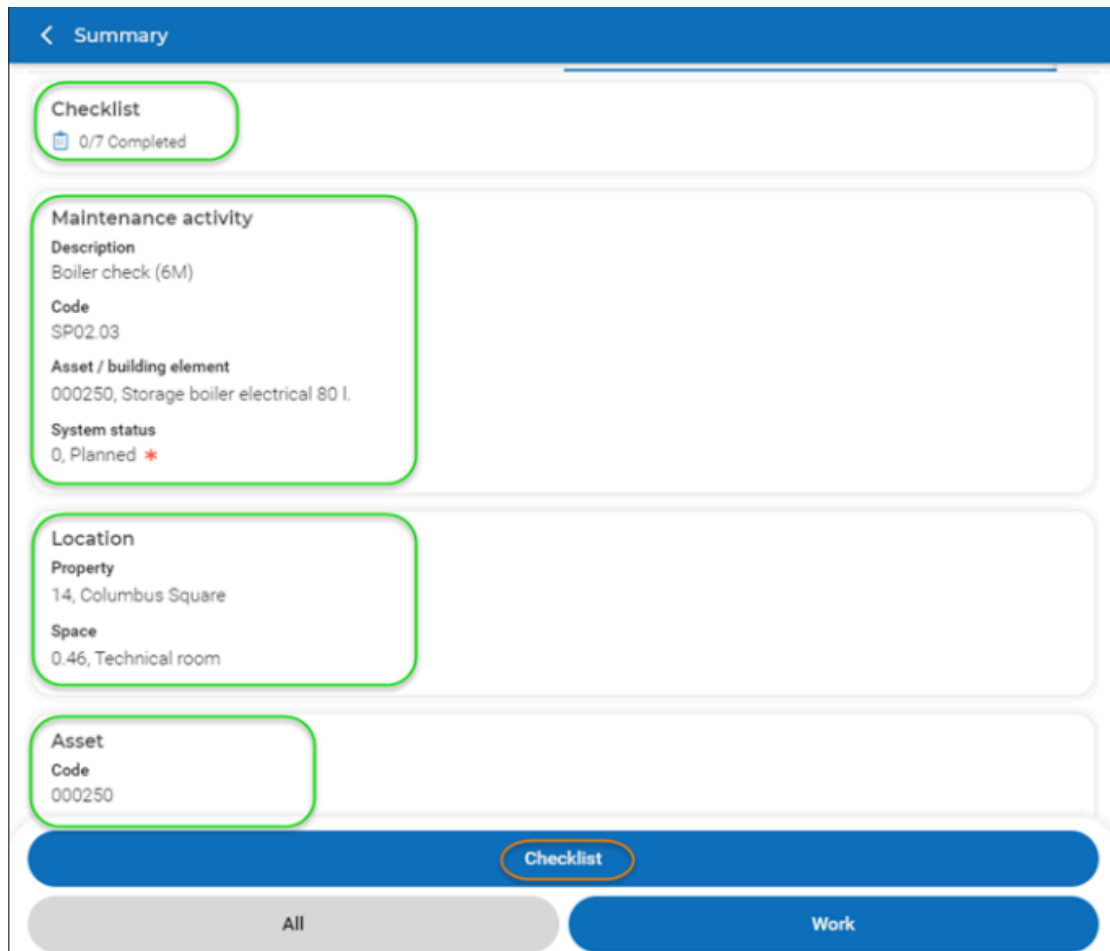
A work assignment might be linked to a [single](#) maintenance activity or to multiple maintenance activities. To support both cases, there are two different pages on the PMFS Live app that you can configure: the **Maintenance activities page** and the **Maintenance activity page**.

In case only one maintenance activity is linked to a work assignment, clicking the **Maintenance activities ..../..** button on the app ...





... will direct the app user to the **Maintenance activity** page:



The following procedure is about configuring the **Maintenance activity** page and its blocks:

- **Order communication logs**
- **Checklist items**
- **Maintenance activity**
- **Location**
- **Asset**

- **Tradesperson's notes**
- **Meters**
- **Observations**
- **Activity communication logs**
- **Related orders**

## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the Maintenance activity page.
3. In the data section, on the Page properties tab, edit the page properties as required.
4. Select Maintenance activity block.
5. On the data panel, select the Details fields tab and edit the available settings and fields, as required.



Please be aware that in the **Work assignments** module, the *display text* for all **status** fields (in this case: Maintenance activity - System status) is fixed. So, any changes you make in the **Selector** for such fields, will not change the displayed text on the app.

6. Select Location block and edit the available settings and fields, as required.
7. Do the same for any of the other blocks listed above, as required.

**The edited blocks are displayed accordingly on the app.**

Proceed with configuring the settings and fields for the corresponding **Details** pages and blocks: **Maintenance activity details page**, **Location details page** and **Assets details page**.

## Configuring external labor hour registration

You can activate the registration of labor hours for external co-workers. These people are not, *nor will be*, registered in the Planon database. Their hours are registered as labor hours, but their name is only 'captured' in the back-office (ProCenter Web Client), in the **External co-worker** field on the **Labor hours** record of the order.

### Procedure to activate / de-activate the registration of external labor hours

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the **Add labor hours details block**.
3. In the **Add fields** data section, select the **Internal tradesperson** reference field.

4. At **Field properties**, go to the **Selector** field and open the **Select a value** pop-up.

**The Selector dialog opens.**


5. At the bottom panel of the elements list, select **Search list page**.
6. On the data panel, select the **Actions** tab.
7. Select **External co-workers time registration**.
8. At **Action properties**, set the **Is visible** field to **Yes**.

**Yes is the default value. Select No to de-activate the setting.**

If you select **Yes**, an **External co-worker** button is added to the PMFS Live app . App users who select the **Add labor hours details** page and select the **Tradesperson** field will see the button at the bottom of their screen. They are expected to search the relevant name in the **Tradesperson** list first, before they add the name of the external co-worker via the **External co-worker** button.

## Configuring navigation actions between PMFS modules

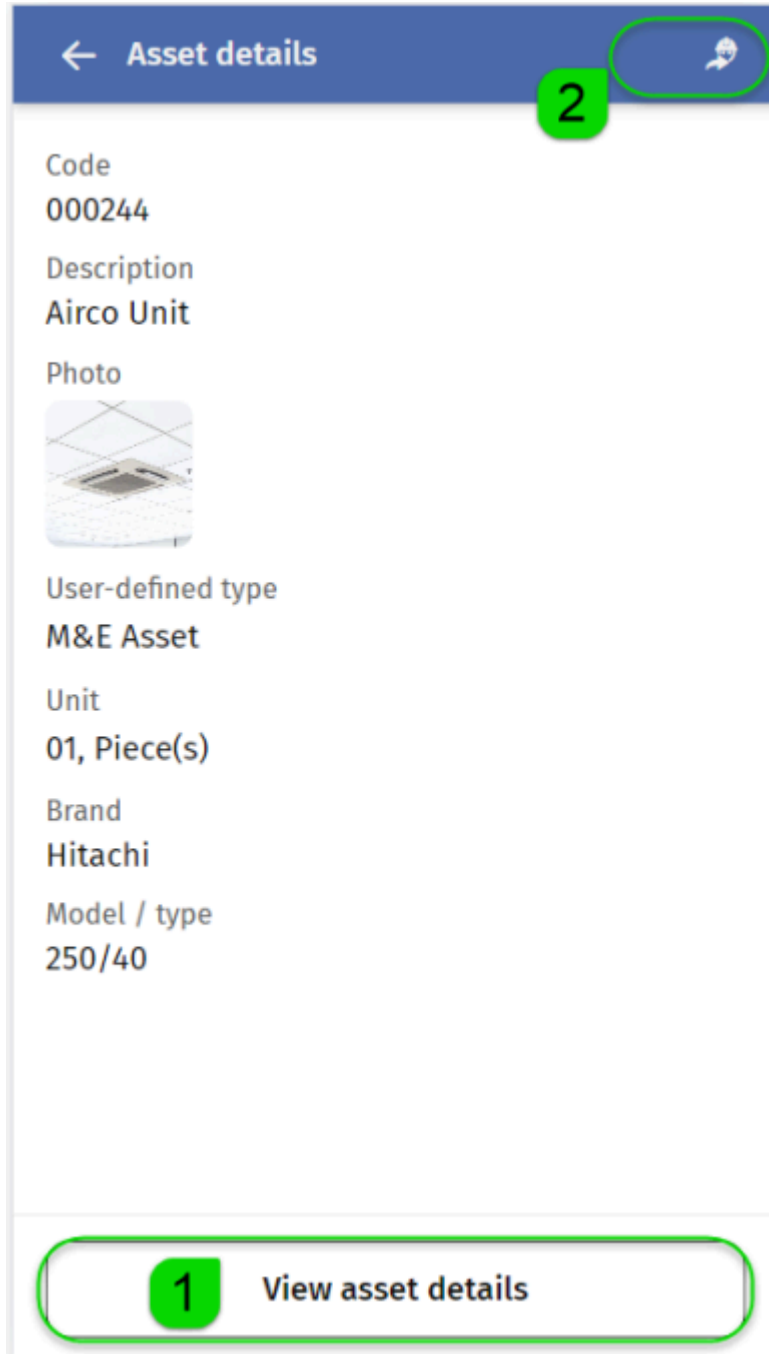
In Planon ProCenter > Live app > PMFS (Live app) > Work assignments you can configure navigation actions between the **Work assignments** module, the **Assets** module and the **Orders** module. This makes it easier for app users to view further details on the related order(s) and asset.

 Users must be online to use the navigation actions.

By default the navigation actions are enabled on the following pages:

1. Work assignments module > **Asset details page** of order / maintenance activity. Destination: **Assets** module > **Summary** page of the selected asset. Action name = **View asset details**. See following image.
2. Work assignments module > **Asset details page** of order / maintenance activity. Destination: **Orders** module > **Order list** block with the asset applied as filter. Action name = **View all related orders**. On the app the actions look like this:

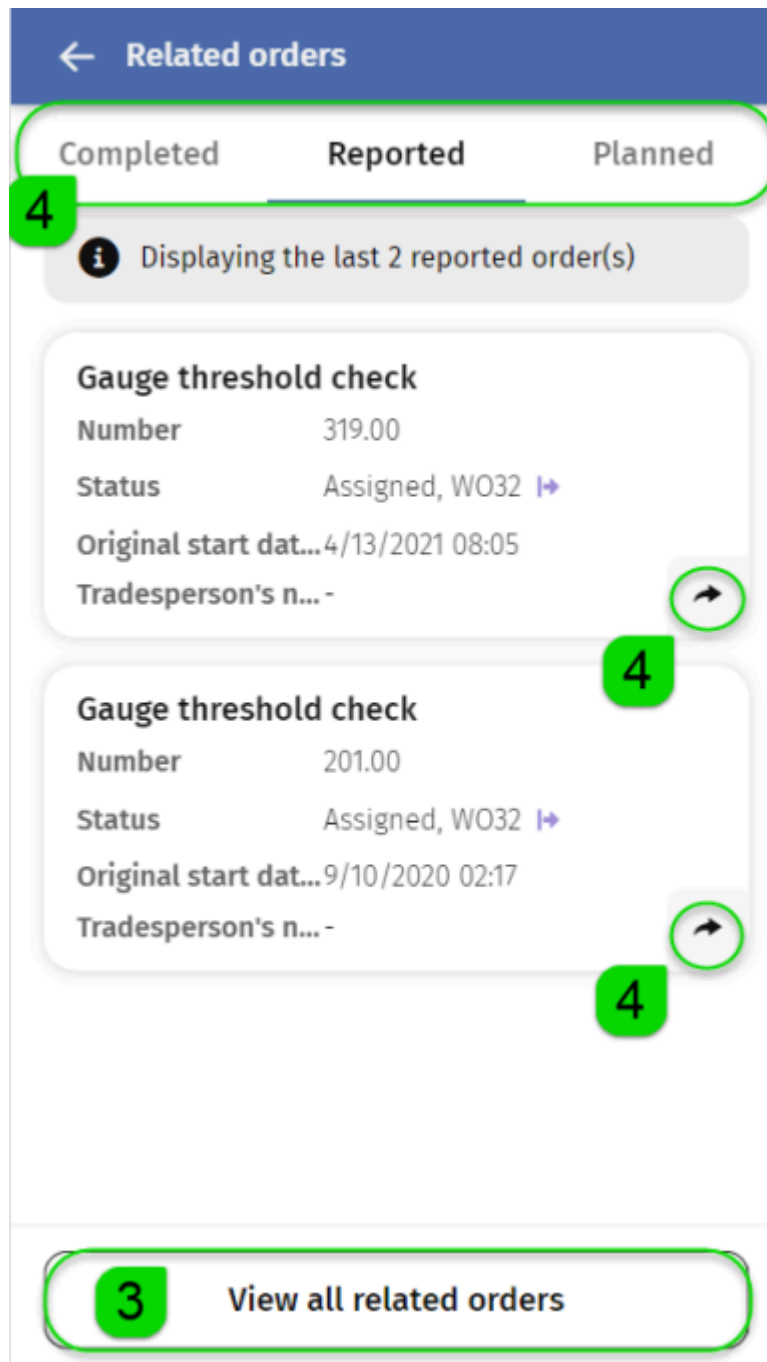
Examples 1 & 2:



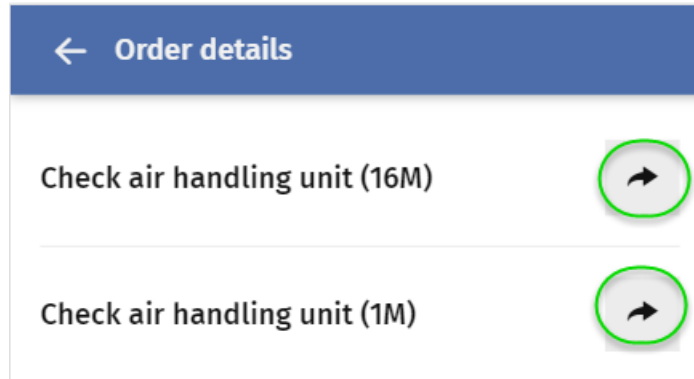
3. Work assignments module > **Related orders details page** of order / maintenance activity. Destination: **Orders** module > **Order list** block with the related orders applied as filter. Action name = **View all related orders**. See following image.
4. Work assignments module > **Completed / Reported / Planned order details block orders details page** of order / maintenance activity, *on each individual record in the block*. Destination: **Orders** module > **Order list**

block with the related orders applied as filter. Action name = **View all related orders**. On the app it looks like this:

Examples 3 & 4:

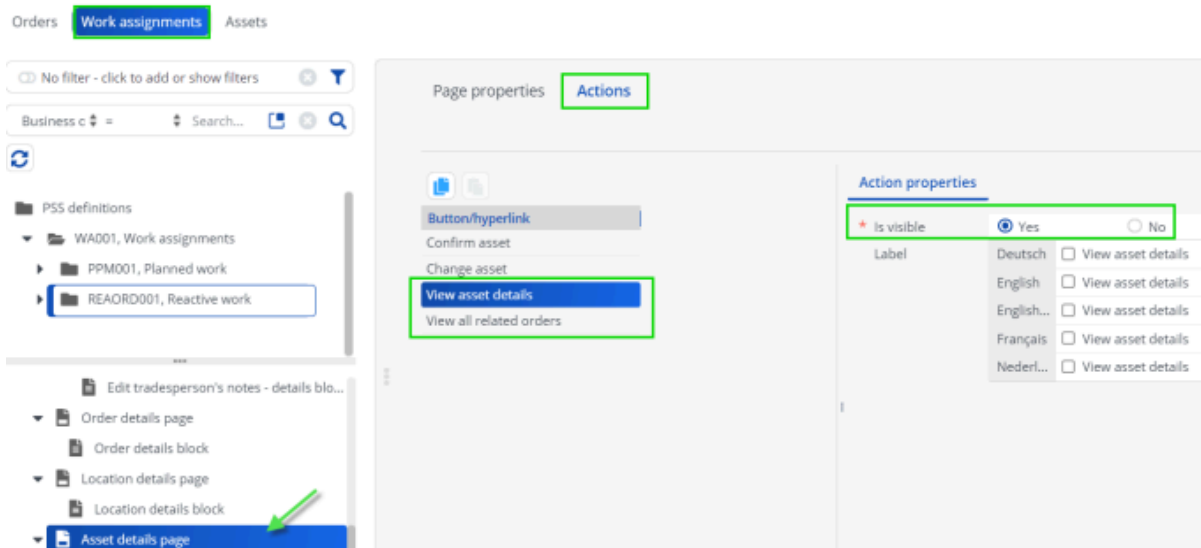


5. **Assets** module > **Orders details** block, on each individual record in the block. Destination: **Orders** module > **Summary page** of the selected order. Action name = **View order details**. On the app it looks like this:

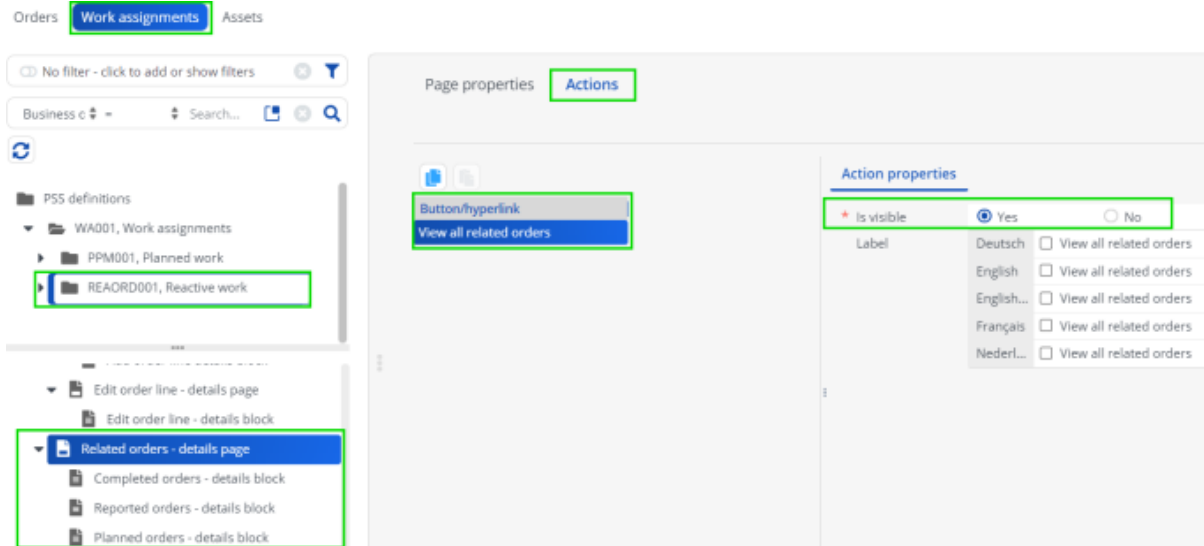


## Configuration procedure

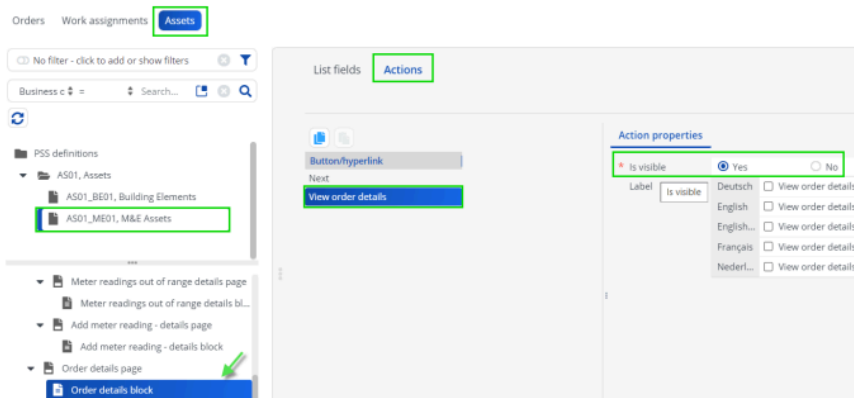
1. In Live app > PMFS (Live app) > Work assignments, first select the relevant sub web definition and then the page for which you want to enable or disable the navigation action.
  - **Asset details page** of order / maintenance activity.
  - **Completed / Reported / Planned order details block orders details page** of order / maintenance activity.
2. On the data panel, select the **Actions** tab.
3. At Action properties > Is visible field, select **Yes** to enable, or **No** to disable the navigation action:



4. Click **Save**.
5. On the **Related orders - details page** and **details blocks**, configure the navigation actions as required, following the same procedure as in steps 2 - 4:



- In Live app > PMFS (Live app) > Assets module, first select the relevant sub web definition and then the **Order details block**, to configure navigation actions as required, following the same procedure as in steps 2 - 4:



## Configuring the Checklist items page and Checklist items details page

On the **Checklist items** page and block and the corresponding **Checklist items details** page and block, you can configure the display of maintenance checklist items and their details on the app.



For information on the ProCenter back-office configuration of checklist items for planned maintenance see [Checklist items](#).

### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the sub web definition that is based on a planned maintenance order (PPM order).
2. At the bottom panel, select and expand the Maintenance activity page.
3. Select the Checklist items page.
4. On the data section's Page properties tab, edit the page settings as required (Page title fields).
5. On the data section's Actions tab, select the Complete activity action.
6. At Action properties > Is visible field, make the required setting for showing / hiding the Complete activity action.
7. In the Label field, enter the relevant label translations for the action.
8. Select the Checklist items block.
9. On the data section's List fields tab, edit the block settings as required ( Show labels, Number of results, No results message, Display number of results).
10. At the bottom panel of the data section, add / delete fields, or adjust the field sequence.
11. On the Field properties tab, edit Field properties as required.
12. Click Save.
13. Select the Checklist items - details page.
14. On the data section's Page properties tab, edit the page settings (Page title fields).
15. Select the Checklist items details block.
16. On the data section's Details fields tab, edit the block settings as required (translations for No information).
17. At the bottom panel of the data section, add / delete order fields, or adjust the field sequence.
18. On the Field properties tab, edit Field properties as required.
19. Click Save.

**The configuration of checklist items (and their details) is updated accordingly in the app. Proceed with configuring the editing options for checklist item messages such as Assessed with observation and Unable to assess.**

## Configuring the Edit pages for checklist items


A maintenance activity can have multiple checklist items linked, which might also be mandatory for a field engineer to validate. For checklist items that cannot not be completed, feedback is sent to the back-office with a reason / explanation. The **Edit** pages and blocks that include this feedback are configurable.



The configuration of the edit pages and blocks for checklist items works 'out-of-the-box'. No actual configuration is required. However, minor adjustments can be made, for example by editing translations of page titles or field labels, or by allowing TMS.

## Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the sub web definition that is based on a planned maintenance order (PPM order).
2. At the bottom panel, select and expand the Maintenance activity page.
3. Select the Edit 'Assessed with observation' checklist item - details page.
4. On the data section's Page properties tab, edit the page settings as required (Page title and Allow TMS card fields).
5. Select the Edit 'Assessed with observation' checklist item - details block.
6. On the data section's Edit fields tab, view the default settings.

 By default, all available and necessary fields are configured correctly. However, minor edits can be made to field properties. The **Reason** field cannot be removed as it essential to the checklist process. For more information about the configuration of reasons for checklist items, see [Linking reasons to checklist results](#).

7. Click Save.
8. Select the Edit 'Unable to assess' checklist item - details page.
9. On the data section's Page properties tab, edit the page settings as required (Page title fields).
10. Select the Edit 'Unable to assess' checklist item - details block.
11. On the data section's Edit fields tab, view the default settings.

 By default, all available and necessary fields are configured correctly. However, minor edits can be made to field properties. The **Reason** field cannot be removed as it essential to the checklist process. For more information about the configuration of reasons for checklist items, see [Linking reasons to checklist results](#).

12. Click Save.

## Configuring details pages and blocks (PPM orders)

The **Maintenance activity page** on the app gives end users access to several details pages, mostly related to information about the asset the asset and the location:

- Checklist items page
- Maintenance activity details page
- Location details page
- Asset details page
- Meter details page

- Activity communication logs details page
- Tradesperson's notes - details page
- Related orders details page

These details pages are configurable. You might for example want to adjust translations, add / remove fields on any of the details blocks etc.

### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select the relevant sub web definition.
2. At the bottom panel, select the Maintenance activity details page.
3. In the data section, on the Page properties tab, edit the page properties as required.
4. Select Maintenance activity details block.
5. On the data panel, select the Details fields tab and edit the available settings and fields, as required.
6. Repeat the procedure for the Location details page and Location details block, as required.
7. Repeat the procedure for the Asset details page and Asset details block, as required.
8. Repeat the procedure for the Activity communication logs details page and its Comments details block, Images details block and Documents details block, as required.
9. Repeat the procedure for the Tradesperson's notes- details page and its subs: the Add tradesperson's notes - details page, Add tradesperson's notes - details block, Edit tradesperson's notes - details page and Edit tradesperson's notes - details block, as required.
10. Repeat the procedure for the Related orders details page and its Completed orders details block, Reported orders details block and Planned orders details block, as required.
11. Click Save.

**The edited pages and blocks are displayed accordingly on the app.**

## Configuring the Engineer's overview and Sign-off pages

When a [key work assignment](#) is completed and the *responsible* field engineer selects the **Done** action on the mobile device, a signing-off procedure is started. This procedure includes:

- **Engineer's overview** details page
- **Engineer's sign-off** details page

- Linking a questionnaire
- **Customer's sign-off** page
- Option for customer to refuse signing off (configurable)


Planon ProCenter back-office settings on the order determine if the engineer and / or the customer are required to 'sign off' on the work that has been completed (**Sign-off required?** and **Sign-off by engineer required?**). After signing off, the overview and signatures are captured in a document or image (this depends on your settings), which is sent to the back-office. There, it is stored as a communication log record on the order. The configuration of the **Engineer's overview details page**, **Sign-off overview** and its details pages and the **Refuse sign-off details page** can be used 'out-of-the-box', but they are slightly configurable, as is explained in the following procedure.

### Procedure


1. In Live app > PMFS (Live app) > Work assignments, select and expand the relevant sub web definition.

**Edit [...] pages are displayed for every available status in the sub web definition.**

2. Select the Edit Done page.

 For non-PPM orders, any required sign-off configuration should also be done on the **Edit Temporary fix** page. The configuration options for signing off pages are identical to those on the **Edit Done page**.

3. At the bottom panel, select the Engineer's overview details page.
4. In the data section, on the Page properties tab, edit the page properties as required.
5. Select the Work assignment details block.
6. Go to the Details fields tab on the data panel and edit the available settings and fields as required.
7. Click Save.
8. Select the Engineer's sign-off details page.

 The **Engineer's sign-off** page works in combination with the **Sign-off by engineer required?** setting on the order.

9. In the data section, on the Page properties tab, edit the page properties as required.
10. Select the Signature details block.
11. On the data panel, select the Upload tab.
12. In the Communication log field, select in which communication log field you want to store the 'Engineer's signatures' for the back-office: in the Image or Document (secure) field.
13. Click Save.

14. For the customer sign-off, select the Sign-off overview - details page.
15. In the data section, on the Page properties tab, edit the page properties as required.
16. In the data section, on the **Actions** tab, edit the required labels for the various actions as required.
17. For the **Refuse** action, select **Yes** in the **Is visible** field, if you want to display the **Refuse** button on the app. This will allow customers to refuse signing off. Select **No** if you do not want to display the **Refuse** button.
18. Select the Work assignment details block.
19. Go to the Details fields tab on the data panel and edit the available settings and fields as required.
20. Click Save.
21. Select the Sign-off details page.




The **Sign-off details page** page works in combination with the **Sign-off required?** setting on the order.

22. In the data section, on the Page properties tab, edit the page properties as required.
23. Select the Communication log details block.
24. Go to the Add fields tab on the data panel and edit the available settings and fields as required.
25. Click Save.
26. Select the Signature details block.
27. Go to the Upload tab on the data panel and edit the available settings and fields as required (Title, Icon, Position).
28. In the Communication log field field, select to which field on the communication log the signature must be uploaded: Document (secure), Document reference, or Image.
29. Click Save.
30. Select the Refuse sign-off details page > Communication log details block.
31. Go to the Add fields tab on the data panel and edit the available settings and fields as required.
32. Click Save.

The sign-off work flow is configured. See [Ending a work assignment and signing off](#) for information on how it works in the app.

## Linking a questionnaire to the 'Edit Done' page

It is possible to add a maximum of three questionnaires to the engineer's **Edit 'Done'** page.

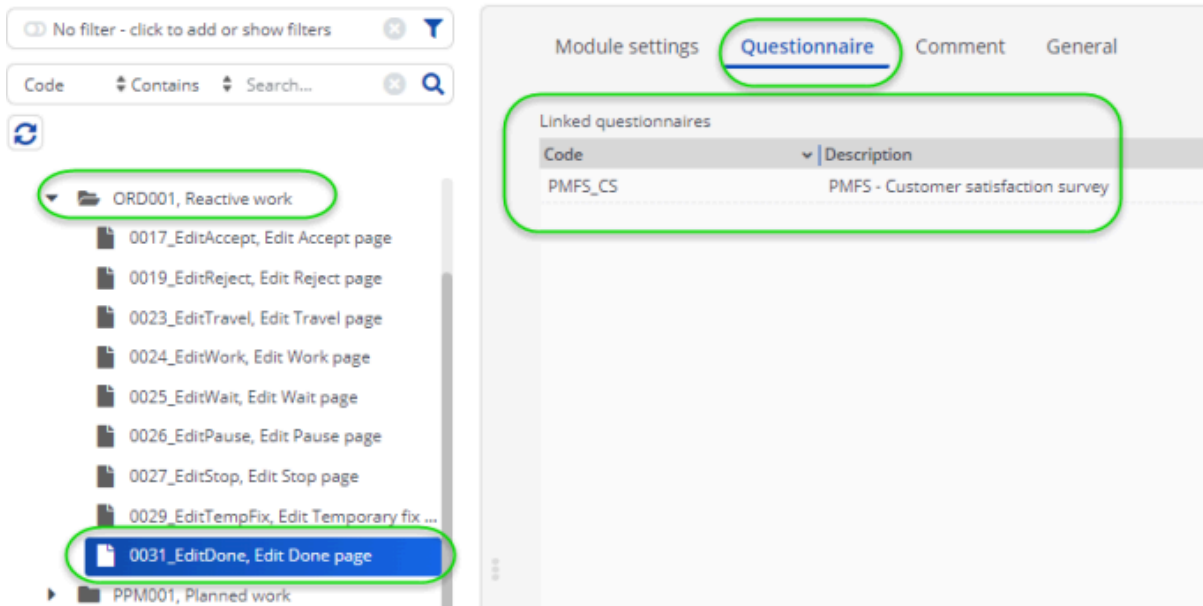
 Dynamic behavior for multi-select fields in a questionnaire is not supported in this app.

### Procedure

1. In Live app > PMFS (Live app) > Work assignments, select and expand the relevant sub web definition.

**Edit [...] pages are displayed for every available status in the sub web definition.**

2. Select the Edit 'Done' page.
3. On the data panel, select the Questionnaire tab.



4. In the Linked questionnaires field select the relevant questionnaire(s).

**The maximum number is three.**

**For more information the configuration of questionnaires in Planon, see [Working with questionnaires](#).**

5. To configure the questionnaire's layout on the app, go to the bottom panel and select Edit Done page > Work assignment details block.
6. On the Edit fields data panel check the sequence of the questions.

**The questions are displayed immediate below the existing fields on this block.**

7. Adjust the sequence of the questions as required.

8. Per questionnaire, add a title bar that indicates the start, by clicking the



button.

9. Place the bar above the corresponding questions.
10. At Bar properties > Bar title, enter appropriate translated names for the bar.
11. If required, select individual questions to edit their Field properties (Mandatory, Read-only, Label) or delete questions that are irrelevant.
12. Click Save.

**The questionnaire is shown on the Edit 'Done' page for all orders of the order type that is supported by the sub web definition. There, engineers can fill in the linked questionnaire(s). On the Engineer's overview page, the questions and answers are displayed as read-only.**

## Glossary PMFS Live app

The following concepts and definitions are specific to the PMFS Live app configuration.

### Health and Safety in the PMFS Live app

#### Preparation

See [Configuring generic Health and Safety settings](#) for more information about enabling generic settings for a Health and safety (H&S) flow on the app.

#### Configuration: Health & safety when starting work

You can configure a health & safety work flow that app users need to go through when they select the **Work** action for a work assignment on the app. This 'Start work' flow will prevent field engineers from starting a job without doing the necessary or mandatory health and safety checks. Additional configuration of the pages and fields to be shown in the wizard can be done via the **Edit work page** on the sub web definition: for **Questionnaires, Permits, Method statements, Risk assessments** and work-related **Activity types**. Here, you can show / hide blocks by setting the **Is visible field** to **No**. On most of the blocks you can also add or remove fields or adjust labels, as required.

The configured H&S work flow will be shown on the app for all orders that have the setting: **EHS check required?** set to **Yes**.

0074\_EditWork, Edit Work page

- ▶ Edit details page
- ▶ Questionnaire details page
- ▶ Permits - details page
- ▶ Activity types details page
- ▶ Hazards - details page
- ▶ Method statement details - page
- ▶ Risk assessments - details page
- ▶ Health & safety questionnaires - details page
- ▶ Health & safety summary page
- ▶ Health & safety reject - details page

## Configuration: Health & safety details pages and blocks

The **Health & Safety details page** allows you to configure the fields that app users will see when viewing the Health & Safety (H&S) details linked to an order.

- ▼ Summary page
  - Communication logs block
  - Order block
  - Work assignment block
  - Health & safety block
  - Tradesperson's notes - block
  - Location block
  - Asset block
  - Meters block
  - Observations block
  - SLA block
  - Labour hours block
  - Materials block
  - Related orders block
- ▶ Communication log details page
- ▶ Work assignment details page
- ▼ **Health & safety details page**
  - Permits details block
  - Activity types details block
  - Hazards details block
  - Method statements details block
  - Risk assessments details block

The following information is listed in *details blocks* on the **Health & Safety details page**:

- **Permits details block**

Any permits linked to an order should be *valid* (which means they must be **approved** in the **Permits TSI**), otherwise the engineer cannot start work and has to reject the work assignment. For more information on working with permits, see: [Permits](#) and [Assigning work assignments with permits](#).
- **Activity types details block**

These are predefined activities that will likely be carried out during maintenance work and that may involve hazards from the **Hazard registry**. For more information see: [Work-related activity type](#).
- **Hazards details block**

Hazards are a potential danger, source of harm or adverse health effect on a person or persons. In Planon ProCenter, hazards are registered in the [Hazard registry](#). Hazards are context-related, which means that they will be grouped on the app, by asset, space or property.
- **Method statements details block**

Method statements are a type of health and safety document including precautionary measures, which people use for high-risk work. For more information see: [Method statement](#).
- **Risk assessments details block**

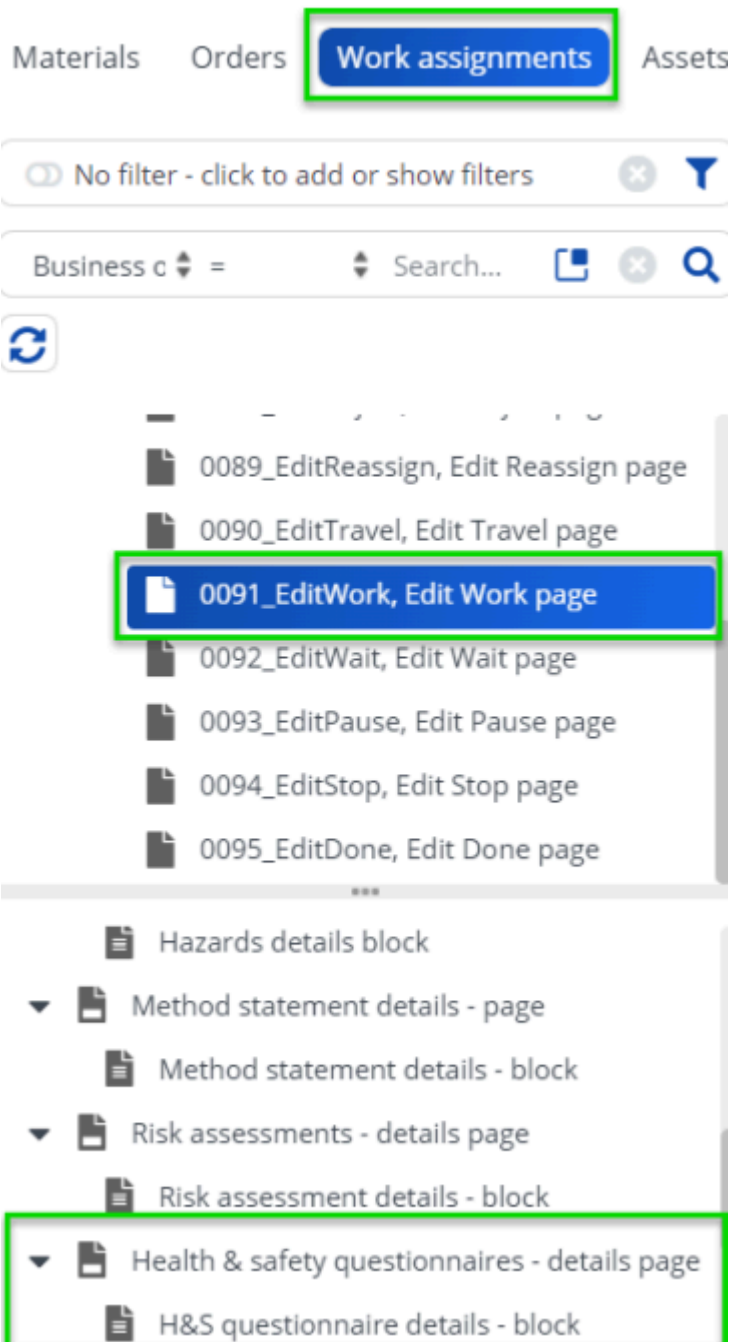
Risk assessments identify potential hazards in the workplace and generally are a legal requirement. For more information see: [Risk assessment](#).

From these blocks, app users can navigate to the **Health & safety details page** that includes separate details blocks for the various H&S features.

### Configuration: Questionnaires

On a sub-web definition's **EditWork** page you can configure H&S-related questionnaires.





Questionnaires can contain an LMRA, or a questionnaire from a linked risk assessment. And this risk assessments is in turn retrieved from the work-related activity types or hazards.

Good to know: if a risk assessment-related questionnaire is linked to a work assignment and it contains 'blocking answers', these may prevent an engineer from starting work. For more information see: [Working with Questionnaires](#) and [Answer option fields](#).

## Key work assignment in PMFS

If there are multiple work assignments linked to an order, one or more work assignments can be marked as *key work assignment*. A key work assignment determines when the work order or PPM order is completed. By assigning someone a key work assignment, they are designated as 'main responsible engineer'. This means that they are responsible for updating the information on the *order*. The information from the non-key work assignments will only update the *order details*.

On the app a key work assignment can be recognized by this icon:



**i** If there are multiple key work assignments on an order, the last key work assignment that is updated, will also update the order.

The main responsible engineer is responsible for:

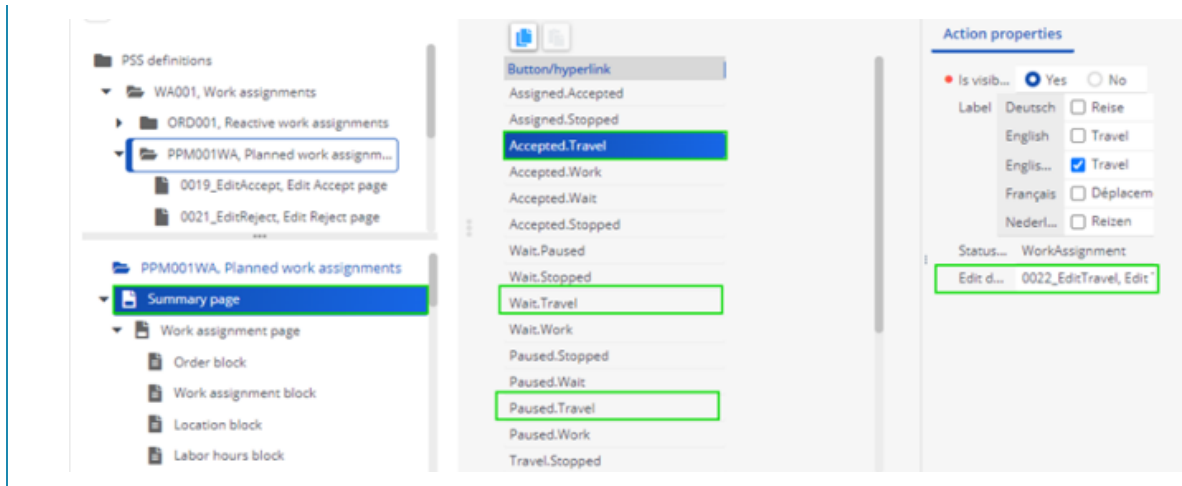
- Completing the job that is linked to the key work assignment and - as a result - technically completing the order. This is done if the responsible engineer sets the **All work completed?** field to **Yes**.
- Filling in questionnaires that are required at the start or at the end of the work.
- Acquiring the customer's sign-off.

## Labor hours registration on the PMFS Live app

By default, the PMFS Live app automatically tracks labor hours on the app. Labor hour records are automatically created upon status transitions from and to **Travel**, **Work** and **Wait**.

Labor hours that are completed on the app will be sent to the back-office as a communication log if the engineer is online. Incomplete (running) labor hours are not sent to the back-office.

**i** The automatic registration of labor hours only works if an **Edit page** is configured for the destination status (**To**) in a status transition. For example: if you want automatic labor hour registration for an engineer's travel time, you have to make sure that the **Edit Travel page** is configured in the **Edit definition** field, for each status transition to the **Travel** status. You can check if an **Edit page** is configured for the relevant destination statuses on the **Summary** page of the web definition.



## Mobile envelopes and working offline

The **Work assignments** app module has 'offline capabilities'.

This basically means that app users can continue to update their work's progress on the app while temporarily working offline. To handle 'being offline', the initial data passed on from back-office to mobile device is processed via *mobile envelopes*. To handle subsequent updates (from device to back-office, or back-office to device), the concept of *messages* is used.

In a technical sense, this means that a mobile envelope is created in the back-office for each record that must potentially be available offline on a mobile device. This happens as soon as the back-office assigns a work assignment to a field engineer, provided that the corresponding order is of the *user-defined type* that is configured on a sub web definition. See [Making PMFS Live app - Work assignments ready for use](#) for the procedure.

Every envelope that is sent out to a mobile device and eventually returned to the back-office contains specific information that 'maps' the order data onto the correct records in the Planon database. Once the data is processed by the back-office, the envelope and all its data is deleted from the mobile device. Thanks to this mechanism, app users do not have to worry about data synchronization or data loss when working offline.


### Mobile envelopes TSI

The app's hidden messaging and any online / offline 'synchronization' issues that might occur can be viewed in the dedicated **Mobile envelopes** TSI. In this TSI, the mobile envelopes and associated messages are logged. The TSI can be added to the navigation panel of Planon administrators who are responsible for monitoring data synchronization between back-office and field engineers. They also need access to a number of additional TSIs:

- **Outbound messages**
- **Outbound raw messages**
- **Inbound messages**

- **Inbound raw messages.**

Using these TSIs, the Planon administrator can re-process any failed envelope messages and delete obsolete mobile envelopes and their messages.

 **Good to know:** if field engineers (internal tradespeople) have opened a work assignment on the app, while in the meantime the back-office removes or changes the work assignment (for example a different **Internal tradesperson**), they will receive a warning message. When they follow the warning message, the work assignment will be set to **Stopped** and removed from the device.


## User accounts

Mobile envelopes will only work for app users with a user account that is also linked to a **Person** in the Planon database. Additionally, in **Accounts**, on the **User groups > Settings > User settings** selection step, the field **Enable work assignment 'envelopes'?** must be set to **Yes** for all relevant users (those who are linked to the **Work assignments** module via their user group).

## Business object settings

See Field definer > [Settings for the Work assignments business object](#) for the procedure to activate mobile envelopes.

## Planned maintenance order restrictions


 If a mobile envelope contains PPM order data, the number of maintenance activities and the number of checklist items per maintenance activity are checked by the system. If the number of maintenance activities exceeds the limit (100), or the number of checklist items for a single maintenance activity exceeds the limit (100), the mobile envelope cannot be opened and you will receive an error message.

## Sign off and Overview pages

If a field engineer ends a work assignment on the app, overviews are provided for both engineer and customer. They allow the engineer to review the work and check that everything is completed as required. The customer can also review relevant details before signing (or even refuse to sign, if this option is configured). When everything is in order, the completed and signed work assignment can be submitted to the back-office.

## Team work assignments

In addition to individual field engineers / tradespeople, work assignments can also be assigned to a maintenance team.

 In Planon ProCenter, maintenance teams are configured by registering the team as if they were a 'person', in the **Personnel** TSI and then making a reference to a **Team** record from the **Supporting data > Maintenance teams** TSI. See also [Configuring teams](#).

If a work assignment is allocated to a team, the system creates and sends out a 'team envelope' for each person who belongs to that team. This is how the work is assigned to a group of people. Next, the individual team members decide if and when they accept the work. Team members can only accept work if they are *online*. Rejecting work can be done both online and offline. For both transactions, accepting or rejecting, team envelopes are returned to the back-office. There, the work assignment data is updated accordingly.

After Planon has processed one team member's envelope for accepting a work assignment:

- status **Accepted** is set on the work assignment;
- the person who accepted the work is filled in on the work assignment as **Internal tradesperson**;
- all other team envelopes relating to the same work assignment are revoked and the work removed from the respective mobile devices, because the assignment is already accepted by one team member.

## Work assignment

Work assignments make it possible for one person or multiple persons to work on the same order at different times.



If you have set the **Field definer** order setting **Activate 'Multiple Work Assignments?'** to **Yes**, you can create *multiple, active work assignments* under a single order at Order details > Work assignments. This enables multiple tradespeople to work on this order, each according to their own individual 'planning'. If select **No** on this setting, there will only ever be 1 work assignment to each order (work order, move order, PPM order).

The work assignment(s) will be displayed on:

- the **Work assignments** selection step in the **Work Orders TSI**
- the **Resource Planner** planboard
- on the **AppSuite** app > My Jobs

Difference between order and work assignment:

In the **Order** fields you describe **WHAT** and **WHERE** work needs to be done. So, the location of the actual work and the 'job description' will be the same for all work assignments. *Example*: a check of the proper operation of all emergency lighting throughout a building.

On the **Work assignment(s)** that you add to the order you describe **WHEN** this work must be done and **WHO** is carrying it out. So, the person carrying out the work and the time when the work is picked up can differ per work assignment.

Consequently, the following data must be entered for each work assignment:

- Internal tradesperson
- Order

- Code

You can create work assignments for the following order types:

- Work orders
- Move orders
- Planned maintenance orders



As soon as you fill in the **Internal tradesperson** on the order, a corresponding work assignment is created automatically.

For more information on work assignments, see the *Work Assignments* user documentation.

Work assignments can be added in:

- **Work Orders** > Order details > Work assignments.
- **Resource Planner**

If configured in your Planon environment, you can also view or edit a person's work assignments in **Personnel** > Details > Work assignments.

If you fill in an internal tradesperson on the order, who is also a field engineer using a PMFS app, and you set the work assignment status to **Assigned**, it will be sent to this person's mobile device. The job can be picked up on site, and subsequently updated and finished. The work assignment is then returned to the back-office for further administrative processing.

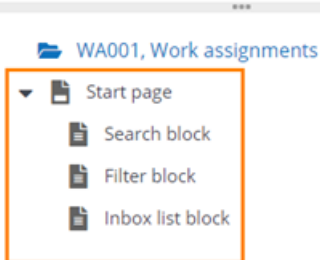
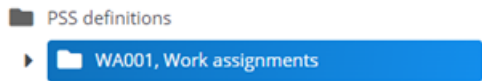
## Work assignments web definition

You can customize the standard delivered **Work assignments** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. On the app, this will result in a **Work assignments** app module that end users, such as field engineers or inspectors, can use to register their work progress.

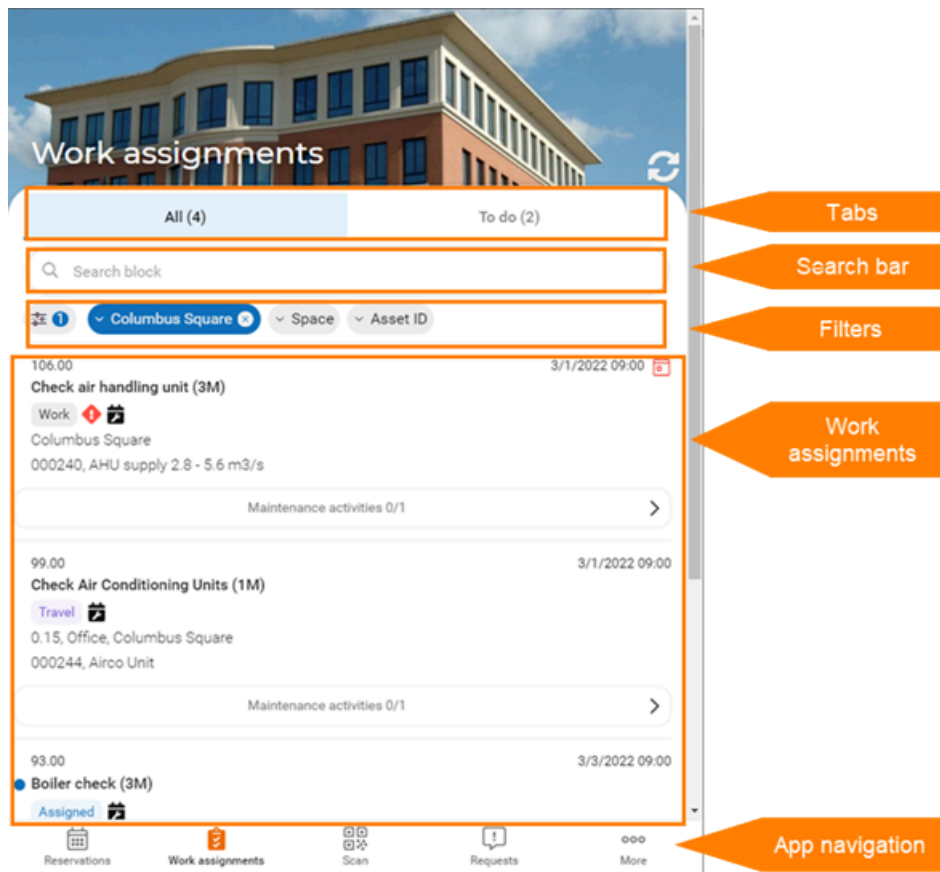
### Web definition

A **Work assignments** web definition (system name: MobileWorkAssignmentRoot) consists of a **Start page** with the following blocks:

- **Search** block - to give app users the option to type words into a search bar and find relevant information in the **Work assignments** module;
- **Filter** block - allows you to configure a set of fields that the app user can use for additional filtering within the search/list block;
- **Inbox list block** - shows a list of all assigned work on the app.



Together the web definition's **Start page** and blocks create the general work overview on the app:



Sub web definition(s)

The sub web definitions for work assignments determine how the various order types are displayed on the app. Depending on the linked order type, a **Work assignments sub web definition** (system name: MobileWorkAssignmentSubDefinition) might consist of a:

- **Summary page**
- **Work assignment page**
- **Work assignment details page**
- **Maintenance activity/-ies pages**

Because it is possible to define different order types in Planon, a different sub web definition must be created for each user-defined order type you want to display on the app. Each sub definition has its own specific configuration. For example, you may want to create different sub web definitions for *PPM orders* and *Reactive work orders*.



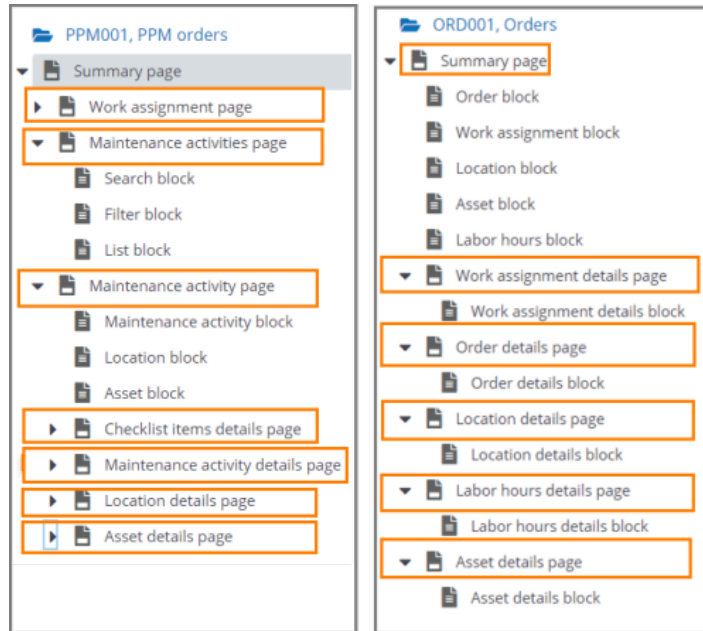
For more information on configuring user-defined business objects in Planon, see the *Field definer* user documentation.

The configurable pages in the sub web definition include more blocks and subpages:

- The **Summary** page of the sub web definition consists of various information blocks and subpages. These are configurable and contain detailed information and actions. The structure of the **Summary** page depends on the user-defined order on which it is based. For most order types the structure is identical, with the exception of the PPM order type, because this type includes maintenance activities and checklist items.
- **Work assignment page** (PPM orders only)
  - **Order** block
  - **Work assignment** block (all types)
  - **Location** block (all types)
  - **Asset** block (not for PPM orders)
  - **Labor hours** block
  - **Work assignments details** page and block (all types)
  - **Order details** page and block (all types)
  - **Location details** page and block
  - **Asset details** page and block (not for PPM orders)
- **Maintenance activities** page with **Search** block, **Filter** block and **List** block (PPM orders only)
- **Maintenance activity** page with **Maintenance activity** block, **Location** block and **Asset** block (PPM orders only)
- **Checklist item details** page and block (PPM orders only)
- **Maintenance activity details** page and block (PPM orders only)
- **Location activity details** page and block (PPM orders only)



- **Asset details** page and block (PPM orders only)



- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration - Overview](#).
- For information about customizing a web definition in **App Configuration** see [Configuring Planon Live App web definitions](#).

## DTAP configuration for mobile Work assignments

If you want to use [Configuration labels](#) and / or [Configuration transfer](#) to move configured **Work assignments** web definitions between Planon environments in a DTA(P) pipeline, there are several things to check and implement in advance.

With regard to Planon Live app's **Work assignments** web definitions, it is *essential* that the source and target environments in the DTAP pipeline have *identical* code values in the following **Code** fields:

- Code field of the **main** web definition;
- Code fields of all **sub** web definitions;
- Code fields of all **Edit** definitions that belong to a sub web definition:

The following image shows an example of these codes in a web definition's hierarchy.  
*Note: in your DTAP pipeline, the codes are most likely different from those in the below example.* So, what you need to do in advance is to ensure that the codes of the different main, sub and web definitions are identical in the D, T and A environments of your DTA(P) pipeline, before you start using **Configuration labels** or **Configuration transfer**.

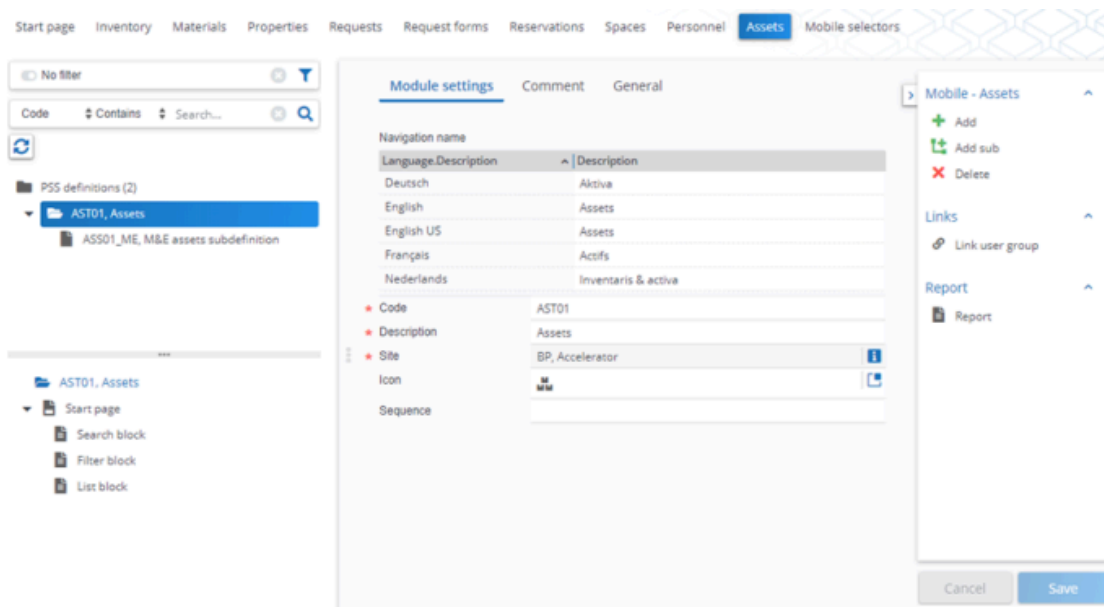
- PSS definitions
  - ▼ ■ WA001, Work assignments
    - ▼ ■ ORD001, Orders
      - 0088\_EditAccept Edit Accept page
      - 0089\_EditReject Edit Reject page
      - 0090\_EditReassign Edit Reassign page
      - 0091\_EditTravel Edit Travel page
      - 0092\_EditWork Edit Work page
      - 0093\_EditWait Edit Wait page
      - 0094\_EditPause Edit Pause page
      - 0095\_EditStop Edit Stop page
      - 0096\_EditTempFix Edit Temporary fix page
      - 0097\_EditDone Edit Done page
    - ▼ ■ PPM001 Planned maintenance orders
      - 0072\_EditAccept Edit Accept page
      - 0074\_EditReject Edit Reject page
      - 0078\_EditReassign Edit Reassign page
      - 0079 EditTravel Edit Travel page

# PMFS Live app - Assets module configuration

You can customize the standard delivered **Assets** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Assets**-based features on the app to find detailed information on corporate assets. They can also add new assets or edit data of existing assets.

## Asset web definition

The **Assets** web definition (system name: MobileAssetRoot) includes all *generic* asset information and functionality, such as searching and filtering, or adding new assets.



**i** As the Planon Live app **Assets** module can be used independently, it requires a separate license: *Planon Mobile Asset Manager*. The user group(s) that you link to an **Assets** web definition, must also be linked to this solution license, for the link to take effect.

The **Start page** of the main web definition consists of a:

- **Search** block - gives users the option to type words into a search bar and find relevant information in the **Assets** module.
- **List block** - shows a list of records/search results
- a **Filter** block - allows you to configure a set of fields that the app user can use for additional filtering within the search/list block

**i** On the **Filter** block, the **Property** field is configured by default. This default value acts as a setting that automatically limits search results to the property of the app user. In other

words, the app user's property is the context for the assets that are shown. End users are able to switch off this filter on the app with a *toggle button*. In that case, all assets of all properties are shown. If you remove the **Property** field from the **Filter** block, the filter and toggle button are disabled and no restrictions will apply to the search results.

- **Add asset tab** block - allows you to add fields and configure field properties on the app
- **Add standard asset tab** block - allows you to add fields and configure field properties on the app

- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration – Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Assets module - Assets web definition

**Planon Live app** comes with a preconfigured, ready-to-use **Assets** module.

In this **Assets** module you can add a new **Assets** based web definition or further customize an existing one. The standard delivered **Assets** web definition enables app users to search for corporate assets.

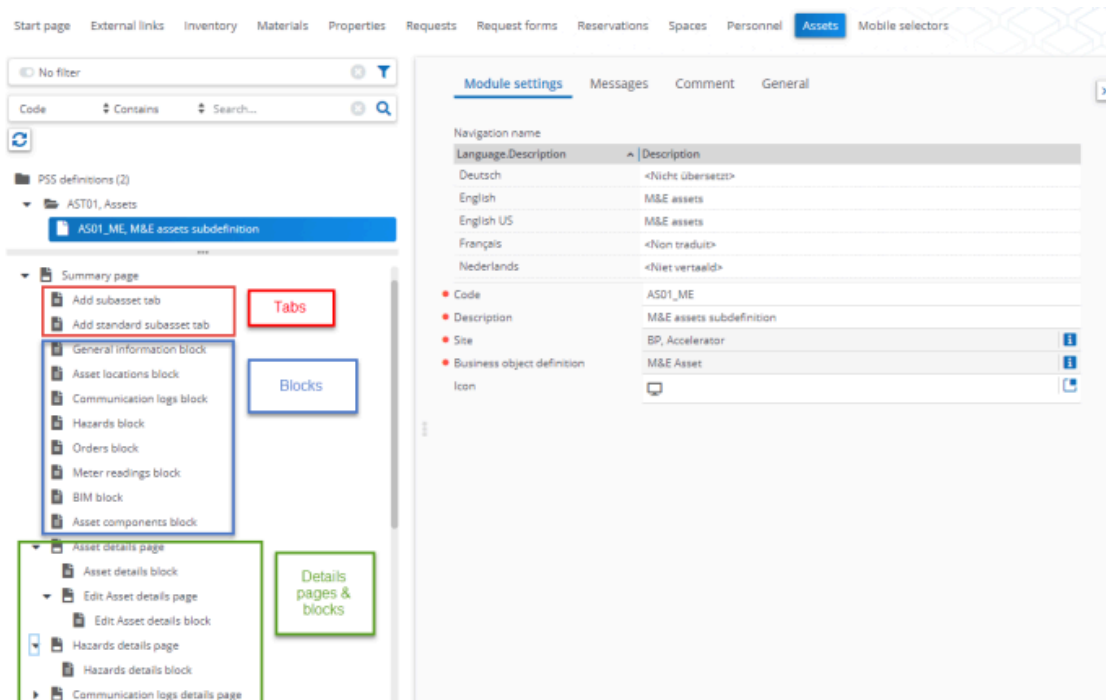
The **Assets** module supports the use of *user-defined* assets. This means you can have different layouts and fields on the app for different user-defined types of assets. For example: you may require a different layout for *Furniture* than for *M&E assets*. For information on how to configure a *sub web definition* per user-defined asset, see [PMFS Live app - Assets module configuration](#).

The **Assets** module also supports displaying the multiple locations of non-unique assets. The Planon **Attributes** feature is currently *not* supported by the Planon Live app.

- For more information on configuring user-defined business objects in Planon, see [Field definer](#).


## Configuring Asset sub web definitions

In the **Assets** module, a **sub web definition** (system name: MobileAssetSubDefinition) consists of a **Summary** page, multiple blocks and details pages, which hold the more *specific* asset information.



You must configure a *separate* sub web definition for each asset type (user-defined asset) you want to show on the app. Each sub will include a configuration that is specific to the linked user-defined asset type.


For example, you can configure separate sub web definitions for *M&E assets* and for *Building elements*. See [Configuring the Asset 'Summary' page & blocks](#) for the procedure of adding a sub web definition.

 For general information on user-defined business objects in Planon, see the *Field definer* user documentation.

- The **Summary page** of the subdefinition consists of blocks, tabs where you can make settings and configure fields and actions. On the main blocks you can, for example, make settings to show or hide the selected block, configure a fixed filter, show the block as a micro block on the app, change the block's title or its position, and so on.
  - Each of the main blocks on the summary page has corresponding **details pages** and **details blocks** for which you can make further settings. Example: the **Hazards block** corresponds with the **Hazards details page** and **Hazard details block**. If end users select a hazard on the **Hazards block**, they are directed to the **Hazards details page**.
  - The **Add subasset tab** includes an action button that allows app users to add a new subasset to an existing asset from the **Summary page**. The **Add standard subasset tab** includes a similar action button that allows users to select a subasset from the asset library.

 The **Add standard subasset tab** is only displayed as a separate action tab if the selected asset on the **Summary page** itself is also based on a standard asset.

- **General information block**
- **Asset locations block** - allows app users to view the details of the location(s) assigned to the selected asset. The display of assets with multiple locations (non-unique assets) is also supported.
- **Communication logs block** - shows app users a summary of the communication logs that are related to the asset (documents, images).
- **Hazards block** - shows app users a summary of the hazards that are related to the asset.
- **Orders block** - shows detailed information of the orders that are related to the selected property.
- **Meters block** - shows app users a summary of the meters and meter readings that are related to the asset.
- **BIM block** - displays the available BIM models that can be viewed for the selected asset.
- **Observations block** - shows app users information about any observation(s) made for the asset / building element
- **Asset components block** - shows app users a summary of the components that are part of the asset. This block is not visible in web definitions that are based on building elements.
- **Details pages**; one for each of these blocks. These details pages zoom in on the details of asset locations, communication logs, meter readings, orders etc.
- **Add asset page** with **Add asset block** and **Upload block** - allows app users to add a new asset or upload asset documents / images (communication logs).
- **Standard asset library page** with a **Search block**, **List block**
  - **Add standard asset page** with a **Add standard asset block** and an **Upload block** - allows app users to add assets based on standard assets, or to upload documents / images (communication logs) for these assets.

 On the **Add asset block** and **Add standard asset block**, you can configure which fields you want to display on the end user's **Add** forms. Most notable are the **Code** and **Asset tag** fields with a **Show QR code scanner** setting. If you select **Yes**, the QR code scanner is displayed in these fields, to allow end users to scan a QR code instead of entering it manually. This way they can make sure that the scanned code matches the code in Planon.

## Configuring the Assets search block (search bar)

The **Mobile - Assets** web definition's **Start page** includes a **Search** block. On this block you can make settings that affect the search bar operations for end users.

The following procedure outlines the steps for the search block's configuration.



For generic information about configuring PSS2-based blocks, see the **Web configuration** user documentation in the WebHelp.

## Procedure

1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets web definition you want to configure.
3. At the bottom of the web definition panel, expand the web definition's tree and select Start page > Search block.
4. On the data panel, under Search fields, indicate in the Search immediately field if you want to make search results immediately available to users upon displaying the form.

**If you select No, users must click the Search button to show the results in the list block.**

5. In the Placeholder field, type texts in the relevant languages to give end users context-sensitive instructions on using the search bar. The placeholder text is displayed as 'grayed out' text. Leave the field blank if you do not require a placeholder text.
6. In the Show QR code scanner field, indicate whether or not you want to display the QR scanner in the Assets module on the app.

**If you select Yes, app users can scan a QR code from within the search bar in the Assets module. In addition, you must add the fields that can hold the values of this QR code to the search block. If a scanned code matches any field in the search block, the result is shown in a list on the app. See also:**

7. At the bottom section of the data panel, configure the fields and field properties to be shown on the app. You can add or remove fields and change their sequence.
8. Per individual field, select a relevant search operator in the Operator field, as required.

**The default value is Contains, which implies that the search results for that field should at least contain the letter(s) / word(s) typed in by the end user.**

9. Click Save.

**Your search block configuration is finalized and will be applied to the mobile app.**

## Configuring the Assets list block (search results)

The **Mobile - Assets Start page** includes a **List** block. On this block you can make settings that will affect the display of search results on the end user's search form.

The following procedure outlines the steps for the list block's configuration.



For generic information about configuring PSS2-based blocks, see the **Web configuration** user documentation in the WebHelp.

## Procedure

1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets web definition you want to configure.
3. At the bottom of the web definition panel, expand the web definition's tree and select Start page > List block.
4. Optional: on the data panel under List fields, use the Fixed filter field to define a filter on search results.



For generic information about configuring PSS2-based pages, blocks and fields, see the **Web configuration** user documentation in the WebHelp.

5. In the Number of results field, type a text in the relevant languages that is displayed to end users about the number of search results, or leave the field blank if you do not require a text.
6. In the Display number of results field, indicate whether or not you want to display the number of results to the end users.
7. At the bottom section of the data panel, configure the fields and field properties to be shown on the app. You can add or remove fields and change their sequence.
8. Under Field properties, specify for each field if it should be visible on the app; where appropriate, enter an alternative label.
9. Where appropriate, make settings for the sorting order of the field.
10. If the selected field is a reference field, link a Selector as required. See Mobile selectors for more information.
11. Click Save.

**Your search block configuration is finalized and will be applied to the mobile app.**

## Configuring the Assets filter block (context filter)

The **Mobile - Assets** web definition's **Start page** includes a **Filter** block. With this block you can enable end users to filter their list page based on context. For example, they can choose to only display assets in the building (property) in which they are currently working or filter out assets from a different property.

The following procedure outlines the steps for the filter block's configuration.



For generic information about configuring PSS2-based blocks, see the **Web configuration** user documentation in the WebHelp.

## Procedure

1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets web definition you want to configure.



3. At the bottom of the web definition panel, expand the web definition's tree and select Start page > Filter block.
4. In the data section, on the Block properties tab, select the relevant field(s) that you want to use as filter criterion, for example Property.

**If no fields are displayed, click the plus symbol and add fields. At least one field must be selected to make the filter feature available on the app. End users can perform filtering on the app by the configured field(s). They can activate multiple filters at the same time, narrowing down the number of results with each additional active filter.**

5. On the Block properties tab, enter a label for the filter in the relevant languages.
6. If you want to add *quick filters* to the app, select the relevant field for this, for example Space.
7. Go to Field properties and set the Display as quick filter? field to Yes.
8. Enter a label for the quick filter at Field properties > Default value.
9. Click Save.

**The Space field becomes available as quick filter on the app.**

10. Add more quick filters as required, up to a maximum of 3.

**Choose from the following fields: Space (will search across both Asset and Asset location), Main asset, Asset group, Asset classification, Alternative classification, Technical classification, Status or User-defined type.**

11. To extend or limit the search scope for the filter block, select the Filter options tab.
12. In the Allow additional search options? field, select an appropriate scope for your filter.
13. Select Not allowed, if you want to limit the search scope to the selected property.
14. Select Include subproperties to extend the search scope to the building's subs.
15. Select Include 'Complex' properties, if you want to extend the search scope to the entire building complex.

You can fine-tune the quick filtering even more.

1. In the **Selector** field, check which mobile selector is linked to your quick filter.
2. Go to the **Mobile selectors** module and select this mobile selector.
3. Click the **Search block** of the selector.
4. Add the fields that should be available as search options on the filter bar within the quick filter. For example: in a quick filter on **Space**, you can enable end users to filter the list of spaces further via the filter bar by entering (part of) a **Comment text** or **Floor finishing** description.

# Configuring the Asset 'Summary' page & blocks

You can add different subdefinitions for different types of assets (user-defined assets). This allows you to create layouts for these assets on the app. See the procedure at the bottom of this topic.

An **Assets** sub web definition consists of a:

- **Summary** page with several information **blocks**, **details pages** and **details blocks**. These are designed to display detailed information about an asset on the app.


On the Summary page > Actions tab, you can set the **Is visible** field to **Yes** to show the following end user actions at the top of the mobile screen:

- Request: 

- Add subasset:

Additionally, some tabs are included that can be configured to allow end users to add data. The following list outlines which blocks / tabs can be configured:

- tab to add a subasset
- tab to add a standard subasset
- general information
- asset locations

 the **Asset locations** details page and block display the location of an asset on the app. If the asset it is a **multiple** (non-simple) asset, the app displays the number of assets and the number of different locations. Tapping the location details will reveal all locations of the multiple asset to the app user.

- communication logs (asset-related documents / images)
- hazards
- orders
- meters
- BIM functionality
- asset components
- observations

 Some summary blocks, such as **Asset locations**, **Orders**, **Hazards**, **Meter readings** and **Asset components**, are lists of items. If many lists are configured on the app, this requires a lot of scrolling by app users. You can prevent this by configuring these blocks as **micro blocks**. See [Configuring summary blocks as micro blocks on the app](#) for the procedure.

Most configuration can be done in the same way as described for Self-Service (PSS2) web definitions. However, some blocks include specific settings and configurable fields. These are briefly explained below.



For generic information about configuring PSS2-based pages, blocks and fields, see the **Web configuration** user documentation in the WebHelp.

## Procedure

1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets web definition you want to configure.
3. On the action panel, click Add sub to add a sub web definition.

**a sub web definition must be created for a specific user-defined asset. For example: an M&E asset (Mechanical & Electrical asset).**

4. From the Business object definition dialog, select the user-defined asset for which you are creating the sub web definition.
5. Enter a code, description and navigation name for the sub web definition.
6. Click Save.

**At the bottom of the web definition panel, you will now see the whole subdefinition tree with multiple blocks and details pages.**

7. Select relevant pages or blocks and:
  - make settings for page titles / block titles, display of images, icons or TMS cards.
  - add fields and set field properties
  - configure fixed filters



The **BIM model details block** is blank, because it does not contain any configurable fields or other settings.

8. Save your settings.

## Configuring the Edit Assets details block

The **Mobile - Assets Start page** includes an **Edit details** block. On this block you can make settings that affect the way end users can edit asset details on their mobile device.

## Procedure

1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets sub web definition you want to configure.
3. At the bottom of the sub web definition panel, expand the subdefinition's tree and select Summary page > Asset details page > Edit Asset details block.

4. At the Edit fields section, add the fields you want to show on the app's edit form. The maximum number is 50.

**Most notable are the Code and Asset tag fields that have the Show QR code scanner setting. If you select Yes, the QR code scanner is displayed in these fields, to allow end users to scan a QR code instead of entering it manually. This way they can make sure that the scanned code matches the code in Planon. Another frequently used field on the edit form is Photo. If this field is editable (Read-only=No), app users will be able to add / replace photos on the app.**

5. If you decide to configure many fields, separated by bars, consider setting the Enable collapsible bars? field, to Yes.

**App users will be able to collapse or expand the section below each bar. This way, they can reduce their scrolling movements on the page.**

6. Click Save.

**Your Edit Asset details block configuration is finalized and will be applied to the mobile app.**

## Configuring an 'Add meter readings' details page & block

If you want to allow end users to add meter readings for an asset, this can be configured on the app for both counters and gauges.

An asset's condition and maintenance regime can be updated instantly if maintenance engineers are allowed to add new meter readings via their mobile device. The action to add meter readings can be implemented at several locations on the app. Follow this procedure to implement them:

### Procedure

1. In Planon ProCenter , go to Live app > App configuration.
2. Select the Assets selection step (representing the Assets module on the app).
3. On the asset subdefinition, select Meter details page > Meter details tab > Actions tab.
4. Select the Add meter reading action and set the Is visible field to Yes.
5. If required adjust the translations of the action label.
6. Click Save.
7. Repeat steps 4 - 6, as required, at:
  - Meter details page > Meters out of range details tab > Actions tab.
  - the Meter readings details page > Actions tab.
  - the Meter readings out of range details page > Actions tab.
8. Select the Add meter reading - details block.

9. On the Add fields tab, in the fields Counter reading type and Gauge reading type respectively, select the user-defined types of counter readings and / or gauge readings you want to display on the app's Add meter readings block.



If either or both fields are empty, the **Add meter reading** action button will not appear for that type of meter reading.

**The Add meter reading action button is implemented at the selected locations in the app's Assets module.**

10. Add / edit the fields you want to display on the app.
11. Click Save.

## Configuring asset scoring

In condition-based maintenance, the possibility to view and record the latest condition score for an asset can be of great importance. For such cases, you can allow maintenance engineers or FM inspectors to manually add condition scores for an asset via the Planon Live app.

In this task you configure the *display* of the latest asset condition score on the app and the possibility to *add condition scores* by app users. The latest asset condition score can be shown on both the **General information** block and the **Asset details** block.

### Procedure

1. In Live app > App configuration, select the Assets module.
2. Under PSS definitions, select the relevant asset web definition.
3. Expand the definition and select the relevant asset subdefinition.

**This subdefinition must be linked to a user-defined asset type for which condition-based maintenance is required, for example *Building elements*.**


4. At the bottom pane, fully expand the Summary page tree.
5. On the Summary page > General information block > data panel > Details fields tab, make sure that the Latest condition score field is added to the list of displayed fields.
6. On the Summary page > Asset details block > data panel > Details fields tab, make sure that the Latest condition score field is added to the list of displayed fields.
7. Select the Condition scores - details page.
8. On the data panel, select the Actions tab.
9. Select the button Add condition score.
10. At Action properties, make sure that Yes is selected in the Is visible field.
11. Edit the Label text as required. This will appear on the app.

12. Click Save.
13. If required, select the Add condition scores - details block to add or remove fields and configure the field properties of this block.

**By default the Asset condition, Quantity and Condition score fields are selected.**

14. Click Save.

**App users will see the configured Add condition score action (as a + button) and fields on the Condition score details page of the app.**

 The button (action) will only be displayed at the top of the screen if the user is viewing *manually* added asset condition details.

## Configuring summary blocks as micro blocks on the app

Some summary blocks, such as **Asset locations, Orders, Hazards, Meter readings Asset components**, are lists of items. If many lists are configured on the app, this requires a lot of scrolling by the app users. You can prevent this by configuring these blocks as *micro blocks*.

### Procedure

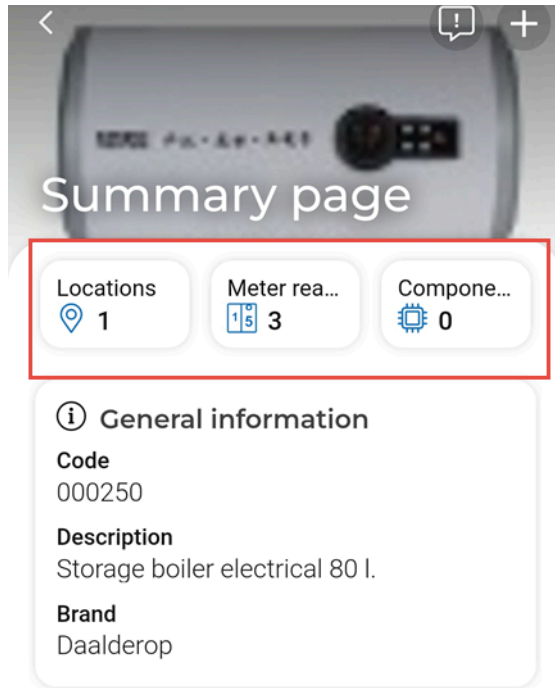
1. In ProCenter, go to Live app > App configuration > Assets.
2. Select the Mobile - Assets sub web definition you want to configure.
3. At the bottom of the sub web definition panel, expand the Summary page.
4. Select the summary block you want to display as micro block on the app, for example Meter readings.
5. On the data panel, on the List fields tab, set the Show as micro block? field to Yes.
6. In the Position field enter the sequence number for the microblock.

**This position number determines in which order the blocks are shown.**

7. Repeat this step for other summary blocks, as required.
8. Click Save.

 A minimum of 2 and a maximum of 3 active micro blocks is allowed.

**The micro block configuration is finalized and displayed on the mobile app, at the top of the Summary page:**



## Configuring the Add asset page / Add standard asset page

In the **Assets** module app users can add additional assets, or edit existing assets. You can configure the **Add asset** page that is available on a sub web definition in the **Assets** module. The page includes features that allow app users to add new assets and upload photos. The page includes:

- a configurable **Add asset block**, to which you can add the fields and bars you want to display on the app layout and make field settings
- an **Upload block**, for which you can make several settings about file type and size.

**i** For the configuration of the **Add standard asset page** and its blocks you can refer to the following procedure, since it is identical.

### Procedure

1. In ProCenter, go to Live app > PMFS (Live app) / App configuration > Assets.
2. Select the relevant Mobile - Assets web definition.
3. Select the relevant sub web definition.
4. Navigate to the Add asset page and select the Add asset block.

5. On the data panel, at the Add fields tab, add fields and tabs to the layout, as required.

**The maximum number of fields is 50.**



You can for example add the **Simple?** (Yes / No) field, to help app users identify if an asset consists of multiple identical items with various locations, or if the asset is just a single item with one location.

6. If you decide to configure many fields, separated by bars, consider setting the Enable collapsible bars? field to Yes.

**App users will be able to collapse or expand the section below each bar. This way, they can reduce their scrolling movements on the page.**

7. At Field properties make the necessary field settings.
8. Click Save.
9. Navigate to the Upload block.
10. To allow the upload of files via the app, such as images, set the Allow upload field to Yes. By default, it is only possible to upload file types of .jpg and .jpeg.

**on the app, a Photo field is displayed, at the bottom of the page. In this field, app users can upload one or more images. For each added image, a communication log is created in ProCenter.**

11. In the Communication log type field select the relevant communication log type for the uploads.
12. At the Communication log field drop-down, select in which field the uploaded file must be stored on the communication log: Document (secure), Document reference or Image.
13. In the Label and Title fields, add label translations as required.
14. Click Save.

## Configuring standard observations (Library and Add page)

In the **Assets** module app users can add observations about an asset they are working on. They can add a new observation by using a **Standard observation** as a 'template'.

The standard observations library can be configured for the app on the **Standard observation library** page (with a **Search** and **List** block). The corresponding **Standard observation page** with a **Standard observation 'Add' block**, where app users can add their observations, is also configurable.

Procedure




1. In ProCenter, go to Live app > PMFS (Live app) / App configuration > Assets.
2. Select the relevant Mobile - Assets web definition.
3. Select the relevant sub web definition.
4. At the bottom panel, navigate to the Standard observation library page and select the Search block.
5. On the data panel, at the Search fields tab, set the **Search immediately** field to the required value (**Yes / No**).
6. Update the **Placeholder** title of the search bar as required.
7. At the bottom panel, add fields and tabs to the search bar as required.
8. Click Save.
9. Navigate to Standard observation library > List block.
10. On the data panel, at the List fields tab, set a **Fixed filter**, if you want to limit the number of listed items.
11. At the bottom panel, add fields and tabs to the **List block** as required and edit the **Field properties**.
12. Click Save.
13. Navigate to the Standard observation 'Add' block.
14. On the data panel, at the Add fields tab, set the **Enable collapsible bars?** field to the required value (**Yes / No**).
15. Add the bottom panel, add relevant fields and tabs to the block and edit the **Field properties**.
16. Click Save.

# PMFS Live app - Materials module configuration

You can customize the standard delivered **Materials** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks.

Live app > PMFS Live app > Materials comes with a pre-configured **Materials** module. You can customize the corresponding web definition to make changes to the **Materials** module on the app, or create and customize a new web **Materials** definition.

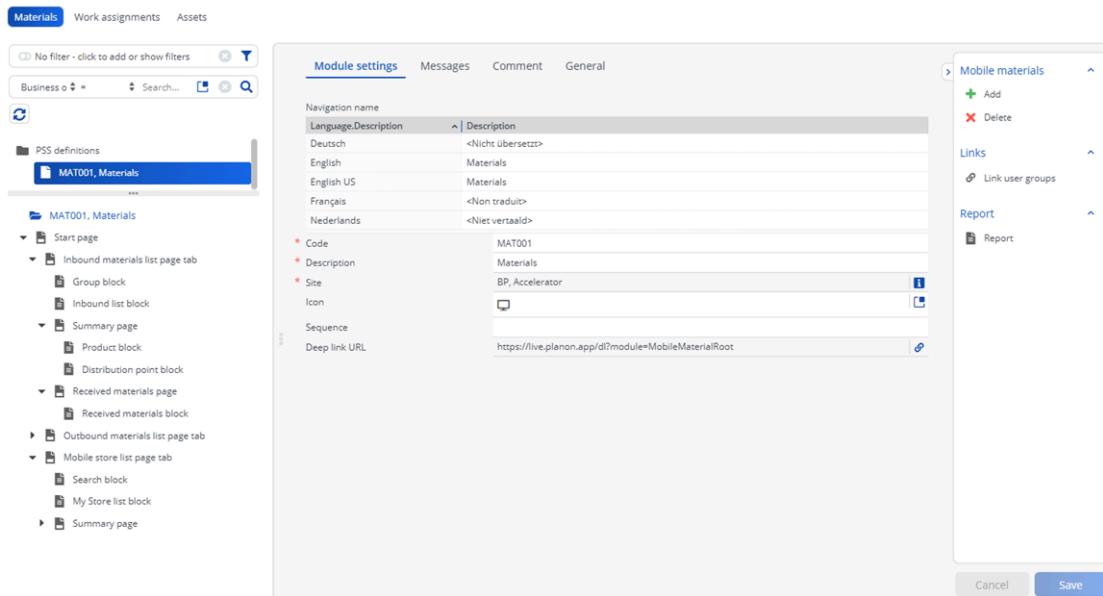
 The **Materials** module supplements the product requisition process in the app's **Work assignments** module, where field engineers can request the materials they need to complete a work assignment. Settings are available on the **Materials** block in **Work assignments** to determine whether you want to use order lines and / or requisition lines for requesting materials, or both.

For more information about these settings, see [Configuring Details pages and blocks - generic and specific settings](#).

## Materials module - Materials web definition

The web definition consists of a **Start page** and 3 list pages, each representing a *tab* on the app:

- Inbound materials
- Outbound materials
- Mobile store



## Adding a Materials web definition

The following procedure explains how to add / edit a **Materials** web definition. The configuration determines which information app users will see with regard to inbound / outbound materials and their mobile store.

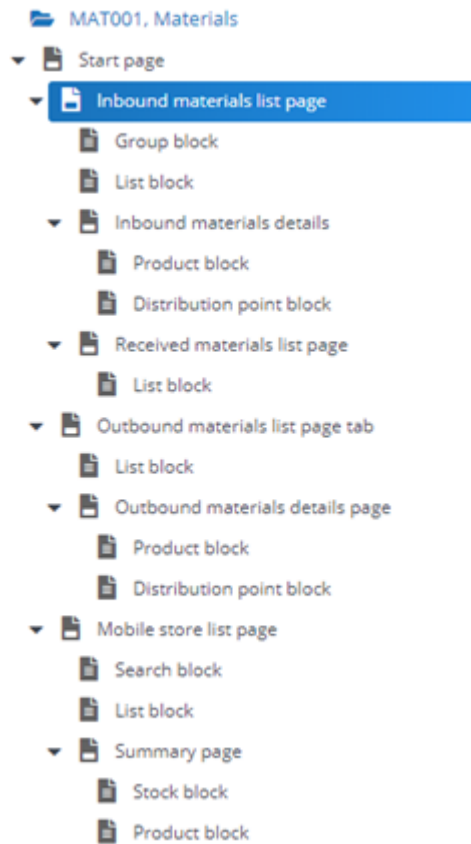
### Procedure

1. Select the existing Materials web definition, or add a new one via the action panel.
2. In the data section, complete / edit the relevant fields.

**You can enter translated navigation names for the module, add an icon, and specify the order in which the module should appear on the app.**

3. Click Save.

**A Start page** including three list page definitions, each with their own distinctive details pages and blocks, are now created and displayed on the **Web definitions** panel: **Inbound materials list page**, **Outbound materials list page** and **Mobile store list page**.



4. Per page or block you can make minor changes on the data panel, for example by translating labels, adding fields, etc.
5. Click Save.

**The Materials web definition is added / edited and you can proceed with linking user groups via the action panel.**


# PMFS Live app - Orders module configuration

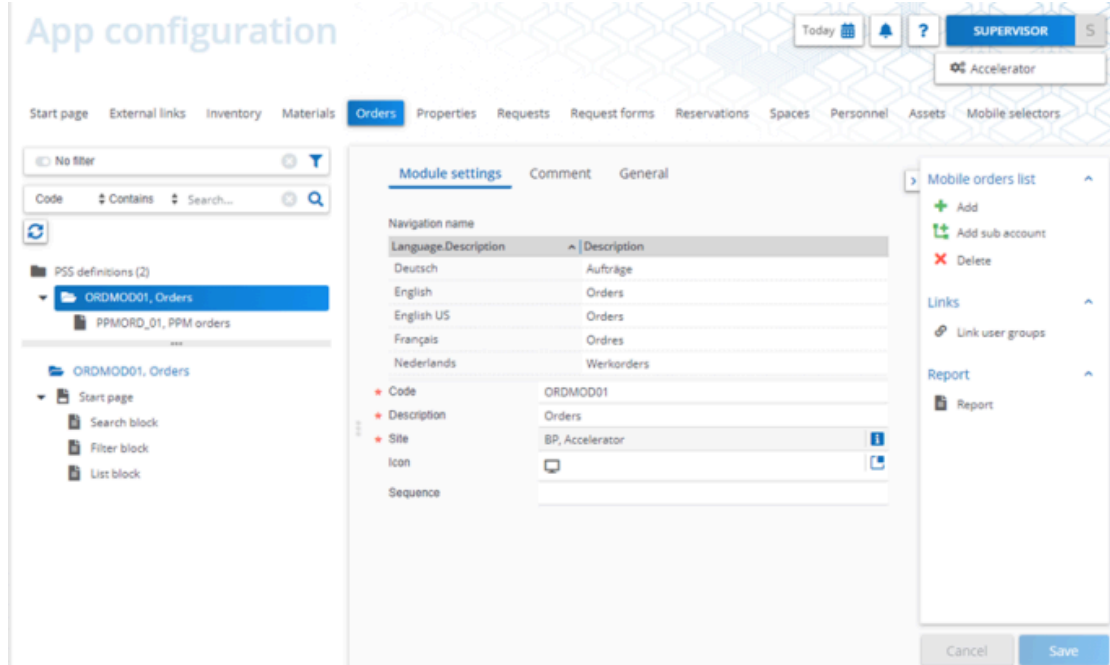
You can customize the standard delivered **Orders** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Orders**-based features on the app to find detailed information on orders.

The **Orders** web definition (system name: MobileOrderList) consists of a **Start page** with 3 blocks. This web definition provides *basic* order information and functionality via a **Search** block, **Filter** block and **List** block.

The **Orders sub web definition** (system name: MobileOrderSubDefinition) consists of a **Summary** subpage, multiple blocks and details pages.

Per user-defined order you want to show on the app, you must configure a separate sub web definition. Each sub web definition will include a specific configuration for the linked user-defined order type. For example, you could configure separate sub web definitions for *Planned maintenance* and *Reactive maintenance*.

 For more information on user-defined business objects in Planon, see the *Field definer* user documentation.



The screenshot shows the 'App configuration' interface for the 'Orders' module. The left sidebar displays a tree view of 'PSS definitions (2)' including 'ORDMOD01, Orders' and 'PPMORD\_01, PPM orders'. The main area is titled 'Module settings' and shows a table for 'Language.Description' with columns for 'Language' and 'Description'. The table lists entries for Deutsch (Aufträge), English (Orders), English US (Orders), Français (Ordres), and Nederlands (Werkorders). Below the table, there are fields for 'Code' (ORDMOD01), 'Description' (Orders), 'Site' (BP, Accelerator), 'Icon', and 'Sequence'. A right-hand panel shows 'Mobile orders list' with options to 'Add', 'Add sub account', 'Delete', 'Link user groups', and 'Report'. The top navigation bar includes 'Start page', 'External links', 'Inventory', 'Materials', 'Orders', 'Properties', 'Requests', 'Request forms', 'Reservations', 'Spaces', 'Personnel', 'Assets', and 'Mobile selectors'. The user is logged in as 'SUPERVISOR'.

Language	Description
Deutsch	Aufträge
English	Orders
English US	Orders
Français	Ordres
Nederlands	Werkorders

The configurable pages include several blocks and more subpages:

- The **Start page** of the main web definition consists of a **Search** block, a **Filter** block, a **List** block. For more information on configuring the **Filter** block, see [Configuring the Orders filter block \(context filter\)](#).
- The **Summary** page of the sub web definition consists of several information blocks and subpages that contain the blocks' details and actions:
  - **Orders block**
  - **Work assignments block**
  - **Order lines block**
  - **Requisition lines block**
  - **Order hours block**
  - **Maintenance activities block**
  - **Communication logs block**
  - **Details** pages; one for each of these blocks.
  - An additional **Checklist items details page** is available under the **Maintenance activities details** block.

Configuring a **Orders sub web definition** is very similar to creating a subdefinition for the **Assets** web definition. See [Configuring the Asset 'Summary' page & blocks](#) for the procedure.

- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp.
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#).

## Orders module - Orders web definition

**Planon Live app** comes with a pre-configured, ready-to-use **Orders** module. You can customize the standard delivered **Orders** web definition to your requirements, by setting page properties for the pages and configuring layouts for the blocks. End users can use the **Orders**-based features on the app to find detailed order information.

- The **Orders** module supports the use of *user-defined* orders. This means you can have different layouts and fields on the app for different user-defined types of orders. For example: you may require a different layout for *Planned maintenance orders* than for *Reactive maintenance orders*. You can configure the various layouts for different order types by adding *sub web definitions* per user-defined order. This is very similar to adding sub web definitions for assets. See [Configuring the Asset 'Summary' page & blocks](#).

- For more information on configuring user-defined business objects in Planon, see [Creating user-defined business objects](#).

# Configuring the Orders filter block (context filter)

The **Mobile - Orders** web definition's **Start page** includes a **Filter** block. With this block you can enable end users to filter their search results based on context. For example: with a filter on **Property** they can choose to only display the orders for the building in which they are working or filter on a different building.

The following procedure outlines the steps for the filter block's configuration.



For generic information about configuring PSS2-based blocks, see the **Web configuration** user documentation in the WebHelp.

## Procedure

1. In ProCenter, go to Live app > PMFS (Live app) > Orders.
2. Select the Mobile - Orders web definition whose filters you want to configure.
3. At the bottom of the web definition panel, expand the web definition's tree and select Start page > Filter block.
4. On the Block properties tab, enter a label for the filter in the relevant languages.
5. At the bottom panel, select the relevant field(s) that you want to use as filter criteria, for example Property.

**If no fields are displayed, click the plus symbol and add fields. At least one field must be selected to make the filter feature available on the app. Users can perform filtering on the app by the configured fields. They can activate multiple filters at the same time, narrowing down the number of results with each additional active filter.**

6. If you want to add *quick filters* to the app, select a relevant field, for example Space.
7. Go to Field properties and set the Display as quick filter? field to Yes.
8. Enter a label for the quick filter at Field properties > Label.
9. Click Save.

**The quick filter for Space become(s) available on the app.**

10. Add more quick filters as required, up to a maximum of 3.

**Choose from the following fields: Property, Space, Asset ID, Trade, Order group, Status, Priority or User-defined type (order type).**

You can fine-tune the quick filtering even more.

1. In the **Selector** field, check which mobile selector is linked to your quick filter.
2. Go to the **Mobile selectors** module and select this mobile selector.

3. Click the **Search block** of the selector.
4. Add the fields that should be available as search options on the filter bar within the quick filter. For example: in a quick filter on **Space**, you can enable end users to filter the list of spaces further via the filter bar by entering (part of) a **Comment** text or **Floor finishing** description.

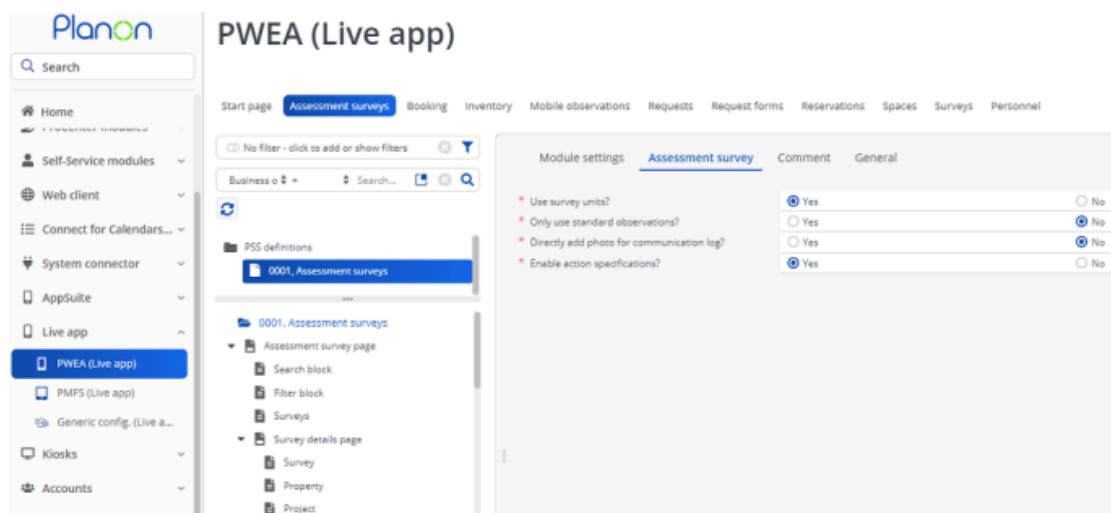


# Planon Live - Mobile Assessment Survey app configuration

Planon Live > Assessment surveys comes with a pre-configured, ready-to-use web definition, called **Assessment surveys**.

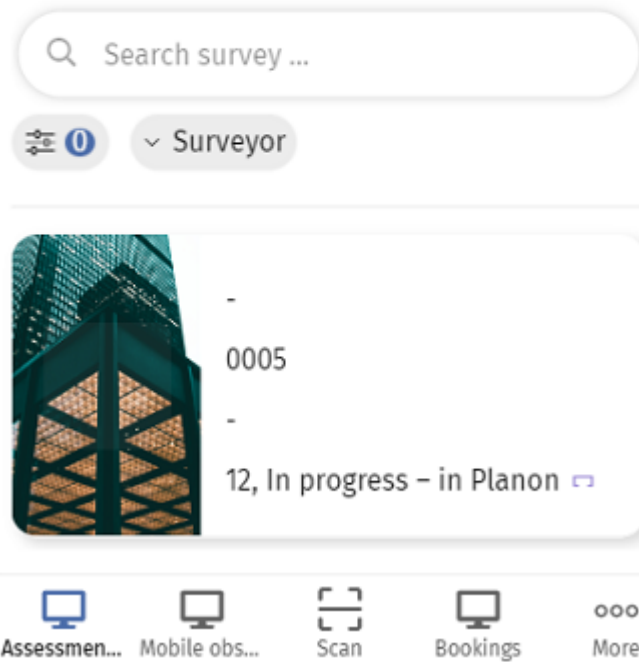


When you click **Add** on the action panel, this pre-configured web definition is created. Once created, you can customize the existing **Assessment surveys** web definition to your requirements.



The **Assessment surveys** web definition is used to publish a module in the **Planon Live app** that enables users to register observations for the assets in a survey. For this reason, the app module also includes several search mechanisms to find assets in the database, such as filters and QR code scanning.

## Assessment surveys



### 2. Assessment surveys - web definition fields

Field	Description
<b>Module settings tab</b>	
Navigation name	Enter navigation labels for this web definition in the relevant languages. These are displayed as module names on the app in the language of the logged-in user.
Code	Enter a code to identify the web definition.
Description	Enter a name for the web definition.
Site	Displays the name and code of the site for which you are creating the web definition.
Icon	Select an icon for the web definition.

### Assessment survey tab

Field	Description
Use survey units?	Select <b>Yes</b> to allow adding survey units to the survey.
Only use standard observations?	Select <b>Yes</b> to only allow standard observations for adding a new observation. If set to <b>No</b> you can create an observation without a standard observation.
Directly add photo for communication log?	Select <b>Yes</b> to allow adding photos directly for communication logs.
Enable action specifications?	Select <b>Yes</b> to allow adding specifications to follow-up actions.
Enable aggregated scoring?	Select <b>No</b> to disable adding a aggregated score.
Enable observation scoring?	Select <b>No</b> to disable adding a score to an observation.

**i** An existing or new **Assessment surveys**-based module can be configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Assessment surveys** web definition and hardly do any configuration, or create a fully customized app.

- For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration - Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#)
- For information about web definitions, pages and blocks see [Web definitions, pages and blocks](#).
- Link the relevant user group(s) to the web definition via the **Link user groups** action on the action panel.

## Enabling the action to add scores to an observation

In the **Assessment surveys** web definition, you can enable the action to add scores to an observation.

### Procedure

1. Select the Assessment surveys web definition.
2. At the bottom panel, select **Topic scores page** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Add** button to **Yes**.

4. Click **Save**.

In the **Mobile Assessment Survey app** , the **Add score** button is enabled on the **Score tab** of the **Observation details** page.

## Enabling the action to edit observation scores

In the **Assessment surveys** web definition, you can enable the action to edit observation scores.

### Procedure

1. Select the **Assessment surveys** web definition.
2. At the bottom panel, select **Topic score** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save**.

## Enabling the action to delete observation scores

In the **Assessment surveys** web definition, you can enable the action to delete observation scores.

### Procedure

1. Select the **Assessment surveys** web definition.
2. At the bottom panel, select **Topic score** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Delete** button to **Yes**.
4. Click **Save** .

In the **Mobile Assessment Survey app** ,  delete icon is enabled on the **topic score** in the **Observation details** page.

## Enabling the action to add scores to an asset

In the **Assessment surveys** web definition, you can enable the action to add scores to an asset.

### Procedure

1. Select the **Assessment surveys** web definition.
2. At the bottom panel, select **Survey asset score** and navigate to the **Actions** tab on the data panel.

3. Set the **Is visible** field of the **Add** button to **Yes**.
4. Click **Save** .

In the **Mobile Assessment Survey** app , the **Add aggregated score** button is enabled on the **Aggregated scores** tab of the **Survey asset-assessments** page.

## Enabling the action to edit survey asset scores

In the **Assessment surveys** web definition, you can enable the action to edit survey asset scores.

### Procedure

1. Select the **Assessment surveys** web definition.
2. On the bottom panel, select **Aggregated scores** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save** .

## Enabling the action to delete survey asset scores

In the **Assessment surveys** web definition, you can enable the action to delete survey asset scores.

### Procedure

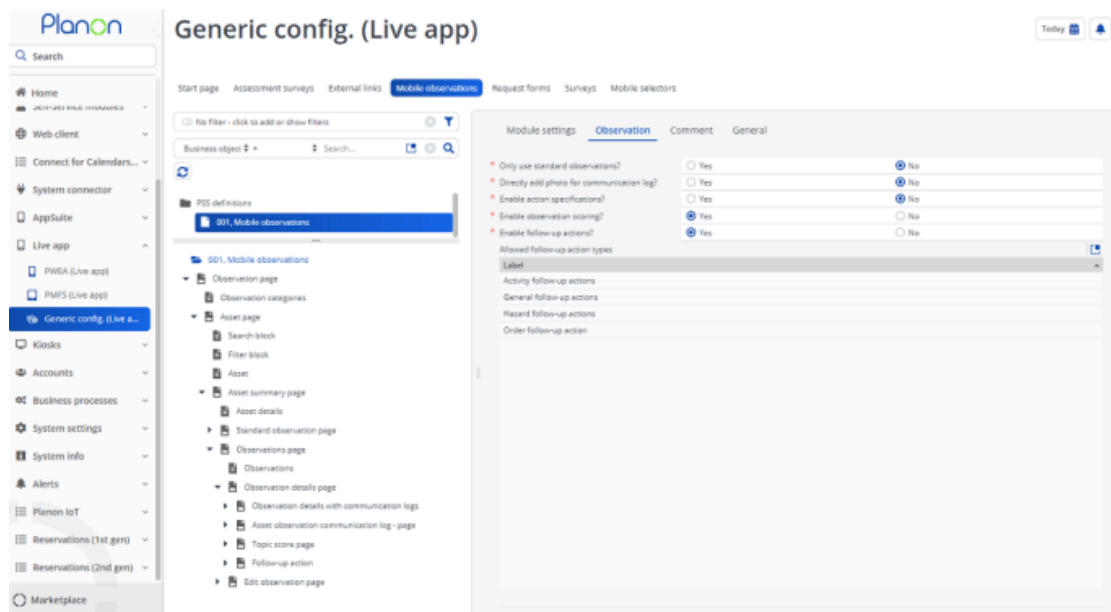
1. Select the **Assessment surveys** web definition.
2. At the bottom panel, select **Aggregated scores** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Delete** button to **Yes**.
4. Click **Save** .

In the **Mobile Assessment Survey** app ,  delete icon is enabled on the aggregated score in the **Survey asset - assessments** page.

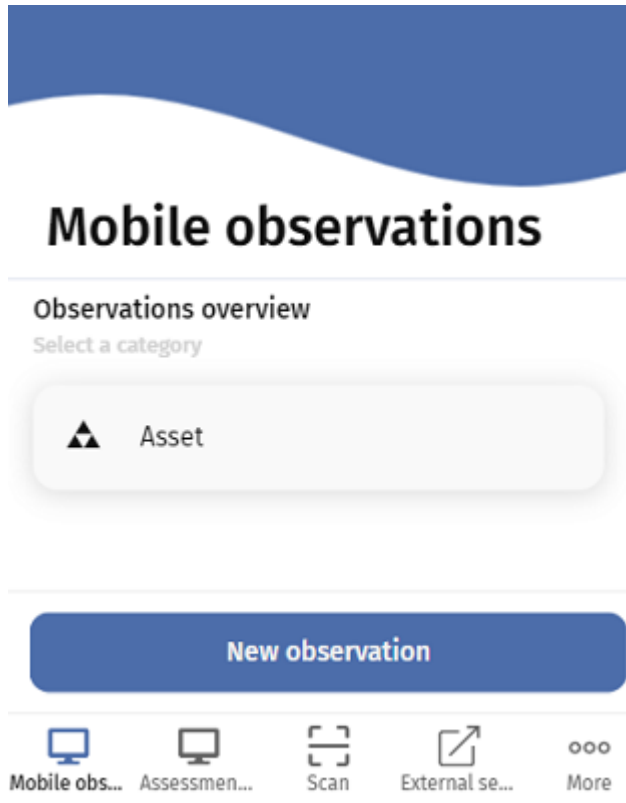
# Planon Live - Mobile Observations app configuration

Planon Live > Mobile observations comes with a preconfigured, ready-to-use web definition, called **Mobile observations**.

You can customize this web definition to modify the existing **Mobile observations** app module or create and customize a new web definition.




The **Mobile observations** web definition is used to publish a module in the **Planon Live app** that enables users to add **observations** to the assets they are working with. For this reason, the app module also includes several search mechanisms to find assets in the database, such as filters and QR code scanning.





### 3. Mobile Observations - web definition fields

Field	Description
<b>Module settings tab</b>	
Navigation name	Enter navigation labels for this web definition in the relevant languages. These are displayed as module names on the app in the language of the logged-in user.
Code	Enter a code to identify the web definition.
Description	Enter a name for the web definition.
Site	Displays the name and code of the site for which you are creating the web definition.
Icon	Select an icon for the web definition.
<b>Observation tab</b>	
Only use standard observations?	Select <b>Yes</b> to only allow standard observations for creating an observation.

Field	Description
Directly add photo for communication log?	Select <b>Yes</b> to allow adding photos directly for communication logs.
Enable action specifications?	Select <b>Yes</b> to allow adding specifications to follow-up actions.
Enable observation scoring?	Select <b>No</b> to disable adding a score to an observation.
Enable follow-up actions?	Select <b>No</b> to disable adding follow-up actions to an observation.
Allowed follow-up action types	Select the follow-up action types that users can add in the Mobile Observations app .
Allow linking existing actions?	Select <b>Yes</b> to allow linking existing follow-up actions to an observation.

 Linking an existing follow-up action means that the observation will be resolved by this follow-up action. Once the follow-up action is completed, the observation will be resolved.

 An existing or new **Mobile observations**-based module can be configured to suit your specific requirements, using Planon ProCenter's PSS2 technology. Due to the unique combination of a hard-coded app (shell) and standard Planon components and the fact that these are metadata driven, you have the option to either stick to the basic **Mobile observations** web definition and hardly do any configuration, or create a fully customized app.

-  • For generic information about configuring PSS2-based web definitions, see the **Web configuration** user documentation in the WebHelp: [Web Configuration - Overview](#).
- For information about customizing a web definition in **App Configuration** see [Planon App web definitions](#)
- For information about web definitions, pages and blocks see [Web definitions, pages and blocks](#).
- Link the relevant user group(s) to the web definition via the **Link user groups** action on the action panel.

## Enabling an action to edit topic scores

In the **Mobile observations** web definition, you can enable an action to edit topic scores.

### Procedure

1. Select the Mobile observations web definition.



2. On the bottom panel, select the **Topic score details page** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save** button.


In the **Mobile Observations app** ,  edit icon is enabled on the **Topic score details page** page.

## Enabling an action to delete topic scores

In the **Mobile observations** web definition, you can enable an action to delete topic scores.

### Procedure

1. Select the **Mobile observations** web definition.
2. On the bottom panel, select the **Topic scores** page and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Delete** button to **Yes**.
4. Click **Save** button.

In the **Mobile Observations app** ,  delete icon is enabled on the topic score in the **Asset observation details page**.

## Enabling an action to edit follow-up actions

In the **Mobile observations** web definition, you can enable an action to edit follow-up actions.

### Procedure

1. Select the **Mobile observations** web definition.
2. On the bottom panel, select the **Follow-up action details - page** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save** button.

In the **Mobile Observations app** , **Edit button** (pencil icon) is enabled on the **Follow-up action details - page**.

## Enabling an action to cancel follow-up actions

In the **Mobile observations** web definition, you can enable an action to cancel follow-up actions.

### Procedure

1. Select the Mobile observations web definition.
2. On the bottom panel, select the **Follow-up action details** page and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Cancel** button to **Yes**.
4. Click **Save** button.

In the **Mobile Observations app** , **Cancel** button is enabled on the **Follow-up action details** page.

## Enabling an action to edit follow-up action specifications

In the **Mobile observations** web definition, you can enable an action to edit follow-up action specifications.

### Procedure

1. Select the Mobile observations web definition.
2. On the bottom panel, select the **Specification actions** page and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save** button.


In the **Mobile Observations app** , **☰** icon is enabled on the specification in the **Specifications** section.

## Enabling an action to edit action specifications on the Specification details page

In the **Mobile observations** web definition, you can enable an action to edit follow-up action specifications on the specification page.

### Procedure

1. Select the Mobile observations web definition.
2. On the bottom panel, select the **Specification details page** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Edit** button to **Yes**.
4. Click **Save** button.

In the **Mobile Observations app** ,  edit icon is enabled on the **Specification details page**.

## Enabling an action to delete follow-up action specifications

In the **Mobile observations** web definition, you can enable an action to delete follow-up action specifications.

### Procedure

1. Select the Mobile observations web definition.
2. On the bottom panel, select the **Specification actions** page and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Delete** button to **Yes**.
4. Click **Save** button.

In the **Mobile Observations app** ,  icon is enabled on the specification in the **Specifications** section.


## Enabling the action to finalize follow-up actions

In the **Mobile observations** web definition, you can enable the action to finalize follow-up actions.

### Procedure

1. Select the Mobile observations web definition.
2. At the bottom panel, select **Follow-up action details - page** and navigate to the **Actions** tab on the data panel.
3. Set the **Is visible** field of the **Finalize** button to **Yes**.
4. Click **Save** .

In the **Mobile Observations app** , the **Finalize** button is enabled on the **Follow-up actions details** page below the **Specifications** section.

 If a follow-up action is finalized, the **Finalized** field is automatically set to **Yes** in Planon ProCenter and a business event is sent to the decision model. The **Finalized** field can then be used as an **attribute** in the decision rules. **For example:** a decision rule on Expected costs > 5000 and Finalized=T.

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