Planon app - Mobile Assessment Surveys

Planon Software Suite
Version: L126

Planon
Building Connections

About this Document

Intended Audience

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

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

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

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About Mobile Assessment Surveys

The **Mobile Assessment Surveys** (MAS) can be used within the **Planon** app. The Planon app is the 'shell' application that you can download from the relevant app store. It can hold various licensed apps / app modules, such as: Workplace solution , the Mobile Condition Assessor , Assets app, Mobile Observations and Mobile Assessment Surveys .

The Mobile Assessment Surveys connects to the **Surveys** TSI in Planon ProCenter . Using the Mobile Assessment Surveys , you, as surveyor, can directly add:

- survey units,
- survey assets,
- survey observations,
- aggregated scores on survey assets.

    In addition, you can add scores for various topics and create follow-up actions to resolve the issues reported via survey observations.

The **Start page** of Mobile Assessment Surveys , shows a list of available surveys for the selected property. The **Search** field allows you to search for surveys by entering a code or description of a survey.

Good to know: if the status of the survey project in Planon ProCenter is:

- **SP05, In preparation** - the survey will not be available in Mobile Assessment Surveys .
- **SP10, In progress** - the survey will be available in Mobile Assessment Surveys , if the status of the survey allows it (i.e. **11, In progress checked out (Ready for survey)** or **12, In progress - in Planon**).
- **SP15, Completed** - the survey will no longer be available in Mobile Assessment Surveys .

ℹ️ Surveys with the statuses **11, In progress checked out (Ready for survey)** or **12, In progress - in Planon** are shown in Mobile Assessment Surveys . Surveys with status **10, In preparation** - preparing survey in Planon ProCenter are not available in Mobile Assessment Surveys .

Features of Mobile Assessment Surveys

- **Search bar** to find survey units, survey assets and standard observations.

- **Edit button** to update information.

- **Scan QR code** button, to find an asset in the database.

- **Filters**, to apply filter criteria and quick filters.

- **Summary page** with various blocks that include different types of information and additional details pages, such as:

  ◦ **Survey details** - details about the property, project and surveyor linked to the survey.

  ◦ **Communication logs** - comments / documents / images that are communicated between you and the back-office.

  ◦ **Survey asset details** - up-to-date information about the survey asset.

  ◦ **Observation details** - details about the start date-time and comments of an observation.

  ◦ **Follow-up action details** - up-to-date information about the follow-up action.

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

Adding communication logs

This section describes how to add communication logs to the Mobile Assessment Surveys .

Adding / uploading an image

In the Mobile Assessment Surveys , you can add images to the surveys, survey assets and survey observations. You can either upload an image from the photo library on your phone or take a picture from within the app.

Procedure

1. On the ... communication log - ... form, select the Images block.

   The Communication logs - ... form is displayed.

2. Select the **Add image** button.

   The Add image form is displayed.

3. Tap the plus sign in the **Image** field to add an image.

4. From the **Available options** pop-up select:

   ◦ **Take photo**, to access your device's camera;

   ◦ **Photo from library**, to select an existing image from your device's photo library.

   ℹ The supported file types are: .jpeg,.jpg

5. Select Add.

   The image is added. The back-office will receive a communication log with the new image.

Adding a comment

In the Mobile Assessment Surveys , you can upload your own comments to the surveys, survey assets and survey observations. This block can be used for the internal communication between you and your co-workers.

Procedure

1. On the ... communication log - ... form, select the Comments block.

   The Communication logs - ... form is displayed.

2. Enter your comment in the text field at the bottom of the screen.

3. Select the Upload button to add your comment to the observation.

   Co-workers working on the same survey will see the new comment directly. The comments are also logged at the back-office, as communication logs.

Adding a document

In the Mobile Assessment Surveys , you can upload documents to the surveys, survey assets and survey observations. You can upload documents related from a folder on your device.

> ℹ The following file types are supported: .rtf,.doc,.docx,.txt,.ppt,.pptx,.xls,.xlsx,.pdf.

Procedure

1. On the ... communication log - ... form, select the Documents block.

   The Communication logs - ... form is displayed.

2. Select the Add document block.

3. On the Add document details page, enter a Description and optional Comments.

4. In the Document(s) field, select Add document.

5. Open the document from the relevant location on your device.

6. Select Submit.

   The document file is added. The back-office can access the new document via the communication logs.

Working with Planon - Mobile Assessment Surveys

This section describes the various functions available for Planon Mobile Assessment Surveys .

Searching surveys in Mobile Assessment Surveys

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

Procedure

1. Open the Planon app > Assessment surveys.

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

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

Example: enter (part of) the description: *Survey_Columbus square*. Or - if you know it, (part of) the code: *00057*.

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

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

Starting and stopping a survey

As a surveyor, you need to start a survey to be able to add survey units, survey assets, survey observations and aggregated scores on survey assets. In the Mobile Assessment Surveys , you can also stop a survey.

1. On the **Start page**, select a survey.

   The Survey details page is displayed, showing the details of the property, survey and project linked to the survey.

2. To start the survey, tap the **Start survey** button at the bottom of the page.

In Planon ProCenter , the status of the survey will change to 2, In progress - in Planon

You are either redirected to the Survey units page if you have access to this information, or to the Survey assets page.

3. To stop the survey, tap the **Stop survey** button at the bottom of the page.

A pop-up appears with the following options:

- ○ **Paused**: Select this option if the survey must be temporarily paused and resumed at a later stage.

- ○ **Finished**: Select this option if the survey is finished.

> ℹ️ When the survey is set to **Finished** it becomes available to other surveyors.

- ○ **Submit for tuning**: Select this option if the survey is completed and ready to send to the back-office. When the survey is transferred to the back-office it is no longer available on the Mobile Assessment Surveys . In the pop-up that is displayed, click **Continue** to psubmit the survey.

> ℹ️ If the back-office staff changes the survey status **11, In progress - checked out (Ready for survey)**, the survey becomes available again on the Mobile Assessment Surveys .

Editing a survey

In the Mobile Assessment Surveys , you can edit survey details.

Procedure

1. On the **Start page**, select the survey you want to edit.

   The Survey details page is displayed where you can see the details of the property, survey and project linked to the survey.

2. Select the **survey** section.

To add communication logs to a survey, see Adding communication logs.

3. Tap the **Edit** button (pencil icon) at the top of the page.

   The Edit survey page is displayed.

4. Make the required edits.

5. Select **Update**.

   It is confirmed that the update was successful.

Adding a survey unit

In the Mobile Assessment Surveys , you can add survey units to a survey if this is permitted in your configuration. The survey unit page is displayed only if the field **Use**

survey units? is set to **Yes** on the **Assessment surveys** web definition's **Assessment survey** tab.

Procedure

1. On the **Survey units** page, tap the **Add survey unit** button.

   The Add survey unit page is displayed.

2. Enter the relevant data.

3. Select **Add**.

   It is confirmed that the survey unit is added successfully.

Editing a survey unit

In the Mobile Assessment Surveys , you can edit a survey unit.

Procedure

1. On the **Survey units** page, tap the (••• icon) on the survey unit you want to edit.

2. Select **Edit survey unit**.

3. Edit the relevant data.

4. Select **Update**.

   It is confirmed that the information is updated successfully.

Deleting a survey unit

In the Mobile Assessment Surveys , you can delete a survey unit added to a survey.

Procedure

1. On the **Survey units** page, tap the (•••• icon) on the survey unit you want to delete.

2. Select **Delete survey unit**.

3. Tap **Yes**.

   It is confirmed that the survey unit is deleted successfully.

Adding an existing asset to the survey

In the Mobile Assessment Surveys , you can add an existing assets to a survey. If you are permitted to add survey units in your configuration, you can add existing assets to a selected survey unit. If not, you are redirected to the **Survey assets** page.

1. On the **Survey assets** page, tap the **Add survey asset** button.

   The Add existing asset to survey page is displayed.

2. You can select the asset from the list or type (part of) the code / name of an asset in the Search field. You can also scan the QR code of an asset using the QR code scanner in the Search field.

   It is confirmed that the asset is added to the survey successfully.

Adding new survey assets

In the Mobile Assessment Surveys , you can new assets to the database. You can do this 'from scratch' and fill in all data yourself, or add one based on a standard asset from the asset library, in which case most asset data is auto-populated.

Procedure

1. On the **Survey assets** page, tap the **Add survey asset** button.

   The Add existing asset to survey page is displayed.

2. Tap the **Add new asset** button at the bottom of the page.

   You are redirected to the Assets module.

3. Tap the plus icon at the top of the screen.

4. Select Add new to add a new asset from scratch, or ...

5. ... select Add from library to add a new asset based on a template (standard asset).

6. Select the type of asset you want to create. The options available depend on your configuration.

7. If you selected Add new, enter the relevant data.

1. Asset fields

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

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

8. Tap Submit.

9. If you selected Add from library, type a search term in the search bar to find the relevant standard asset.

10. Select the standard asset.

11. On the form, select / deselect the relevant settings to include related Sub assets, Standard service plans and Defects lists from the library.

12. Fill in the other asset data fields (see table above).

13. Tap Submit.

    It is confirmed that the asset has been created successfully.

14. On the **Assets** module start page, you can select the newly added asset from the list or type (part of) the code / name of an asset in the **Search** field.

    It is confirmed that the survey asset is added successfully.

Editing a survey asset

In the Mobile Assessment Surveys , you can edit a survey asset.

P r o c e d u r e

1.
    On the **Survey assets** page, tap the (••• icon) on the survey asset you want to edit.

2. Select **Edit asset**.

3. Edit the relevant data on the form.

4. Select **Submit**.

   It is confirmed that the information is updated successfully.

Deleting a survey asset

In the Mobile Assessment Surveys , you can delete a survey asset added to a survey / survey unit.

Procedure

1. On the **Survey assets** page, tap the (••• icon) on the survey unit you want to delete.

2. Select **Delete survey asset**.

3. Tap **Yes**.

   It is confirmed that the survey asset is deleted successfully.

Adding a survey observation

In the Mobile Assessment Surveys , you can add a new survey observation to a survey asset.

Procedure

1. On the **Survey asset - assessments** page, tap the **Add survey observation** button.

If standard observations are available, the Standard observation page is displayed listing all the available standard observations. You can add an observation using a standard observation or tap the Add observation button at the bottom of the page.

> ℹ️ If the field **Only use standard observations?** is set to **Yes** on the **Assessment surveys** web definition's **Assessment survey** tab, you can only add an observation based on standard order.

   The Add survey observation page is displayed.

2. Select a date and time for the observation in the **Select date & time** field.

3. Enter a description in the **Description** field.

4. Add comments in the **Comment** field, if required.

5. Select **Add**.

   It is confirmed that the observation is added successfully.

Editing a survey observation

In the Mobile Assessment Surveys , you can edit an observation on asset.

Procedure

1. On the **Survey asset - assessments** page, from the **Observations** section select the observation you want to edit.

> **i** To add communication logs to a survey observation, see Adding communication logs.

   The **Observation details** page is displayed.

2. Tap the **Edit** button (pencil icon) at the top of the page.

   The **Edit survey observation** page is displayed.

3. Make the required edits.

4. Select **Update**.

   It is confirmed that the update was successful.

Deleting a survey observation

In the Mobile Assessment Surveys , you can delete an observation on asset.

Procedure

1. On the **Survey asset - assessments** page, from the **Observations** section select the (delete icon) on the observation you want to delete.

2. Tap **Yes**.

   It is confirmed that the observation is deleted successfully.

Adding a score to a survey observation

In the Mobile Assessment Surveys , you can add a score to a survey observation.

Procedure

1. On the **Observation details** form, select the **Score** tab.

2. Tap the **Add score** button.

3. Select the topic from the list.

> **i** There are various types of scoring methods for topics you can add: **Basic scoring**, **Topic matrix** and **Technical condition scoring**. For more information about scoring methods, see Topic scoring.

4. On the **Add [...] topic score** page, select date and time in the **Date & time of score** field.

5. Enter the relevant data.

Field	Description
Basic Scoring	
Score	Manually enter the score for the observation in this field.
Topic level	Tap in this field to select the topic level.
	ℹ If **Topic ranges** have been defined for a topic, the **Topic level** field will only show those topic levels that are relevant for that specific topic.
Matrix Scoring	
Topic likelihood	Tap in this field to select the topic likelihood.
	ℹ The likelihood is shown based on the matrix of the selected topic.
Topic severity	Tap in this field to select the topic severity.
	ℹ The severity is shown based on the matrix of the selected topic.
Technical Scoring	
Extent	Extent is the proportion in which an observed issue is present in relation to the total surveyed construction or installation.
	Tap in this field to select the relevant extent for the observation. The values range from 1 to 5:
	• 1 - 1%
	• 2 - 2% to 9%
	• 3 - 10% to 29%
	• 4 - 30% to 69%
	• 5 - 70% to 100%
Extent percentage	Manually enter the extent percentage for the observation in this field.
	ℹ After saving the score the **Extent** range field is filled automatically if **Extent percentage** field is filled.
Intensity	An indicator that marks the phase in which the observed issue occurs.

Field	Description
	Tap in this field to select the relevant intensity for the observation. The values range from 1 to 3: • 1 - First stage • 2 - Advanced stage • 3 - End stage
Severity	The influence that an observed issue has on the operability of a construction or an installation. Tap in this field to select relevant severity for the observation. The values from 1 to 3: • 1 - Minor • 2 - Serious • 3 - Critical

6. Select **Add**.

    It is confirmed that the topic score is added successfully.

Editing a survey observation score

In the Mobile Assessment Surveys , you can edit the score added to a survey observation.

Procedure

1. On the **Observation details** page > Score tab, select the score you want to edit.

    The Edit [...] score form is displayed.

2. Make the required edits.

3. Select **Update**.

    It is confirmed that the update was successful.

Deleting a survey observation score

In the Mobile Assessment Surveys , you can delete the score added to a survey observation.

Procedure

1. On the **Observation details** page, select the delete icon on the score you want to delete.

2. In the pop-up, tap **Yes**.

    It is confirmed that the score is deleted successfully.

Adding a follow-up action to a survey observation

For many observations that are made, it is likely that you want to suggest one or more follow-up actions to resolve the issue you observed, or to seize an opportunity.

For example, you may want to:

- address an observation through various solutions, each of which incurs different costs. For each solution, you can recommend a corresponding follow-up action.

- propose a temporary fix via a work order.

- notify field engineers about an observed hazard.

- include an activity in your planning to replace the affected asset.

You can register these follow-up actions in the Mobile Assessment Surveys .

Procedure

1. On the **Observation details** page, select the **Follow-up action** tab.

2. Tap the **Add follow-up action** button.

3. On the **[...] follow-up action** page, select a date and time in the Due date-time field.

4. Enter a description in the **Description** field.

5. **Optional:** enter the expected costs required for the follow-up action in the **Expected costs** field.

6. Add a comment in the **Comment** field.

7. Select **Add**.

   It is confirmed that the follow-up action is created successfully.

Editing a follow-up action of a survey observation

In the Mobile Assessment Surveys , you can edit a follow-up action added to a survey observation.

Procedure

1. On the **Observation details** page, select the **Follow-up action** tab.

2. Select the follow-up action you want to edit.

   The Follow-up action details page is displayed.

3. Tap the **Edit** button at the top of the page (pencil icon).

   The Edit follow-up action page is displayed.

4. Make the necessary edits.

5. Select **Update**.

It is confirmed that the update was successful.

Deleting a follow-up action of a survey observation

In the Mobile Assessment Surveys , you can delete a follow-up action added to a survey observation.

Procedure

1. On the **Observation details** page, select the **Follow-up action** tab.

2. Select the (delete icon) on the follow-up action you want to delete.

3. Tap **Yes**.

    It is confirmed that the follow-up action is deleted successfully.

Adding a specification to a follow-up action

In the Mobile Assessment Surveys , you can add additional specifications to a follow-up action. **For example:** based on the configuration you could specify the number of people, number of hours, required materials or equipment needed to execute the follow-up action. These additional details are called **Specifications**.

> ℹ️ You can only add specifications to a follow-up action if it is allowed in your configuration. The field **Enable action specifications?** must be set to **Yes** on the **Assessment surveys** web definition's **Assessment survey** tab. By default this field is set to **No**.

Procedure

1. On the **Follow-up action details** page, in the **Specifications** section, select the **Add specification** button.

    The Add specification page is displayed.

2. Enter a description for the specification in the **Description** field.

3. Add a comment in the **Comment** field, if required.

4. Select **Add**.

    It is confirmed that the specification is created successfully.

Editing a specification of a follow-up action

In the Mobile Assessment Surveys , you can edit a specification added to a follow-up action.

Procedure

1. On the **Follow-up action details** page, in the **Specifications** section, select the specification you want to edit.

2. Select **Edit specification**.

3. Edit the relevant data.

4. Select **Update**.

   It is confirmed that the information is updated successfully.

Deleting a specification of a follow-up action

In the Mobile Assessment Surveys , you can delete a specification that was added to a follow-up action.

Procedure

1. On the **Follow-up action details** page, in the **Specifications** section, select the specification you want to delete.

2. Select **Delete specification**.

3. Tap **Yes**.

   It is confirmed that the specification is deleted successfully.

Adding a score for a topic on the survey asset

In the Mobile Assessment Surveys , you can add a score for a topic directly on the survey asset.

Procedure

1. On the **Survey asset - assessments** page, select the **Aggregated scores** tab.

2. Tap the **Add aggregated score** button.

3. Select the **Topic** from the list displayed.

For more information on Topics, see Topics.

4. Select a date and time for the score in the **Select date & time** field.

5. Enter a score in the **Score** field.

6. Select the **Topic level** in the **Topic level** field.

For more information on Topic levels, see Topic levels.

> ℹ️ • If **Aggregated topic ranges** have been defined for a topic, the **Topic level** field will only show those topic levels that are relevant for that specific topic.
>
> • You can either fill in the **Score** field or the **Topic level** field. If you fill **Score** field the **Topic level** field is automatically filled based on the score value.

7. Add comments in the **Comment** field.

8. Select **Add**.

   It is confirmed that the score is added successfully.

Editing a score added to a survey asset

In the Mobile Assessment Surveys , you can edit a survey asset's score.

1. On the **Survey asset - assessments** page, select the **Aggregated scores** tab.

2. Select the score you want to edit.

   The Edit aggregated topic score page is displayed.

3. Edit the relevant data on the page.

4. Select **Update**.

   It is confirmed that the information is updated successfully.

Deleting a score added to a survey asset

In the Mobile Assessment Surveys , you can delete a score from a survey asset.

1. On the **Survey asset - assessments** page, select the **Aggregated scores** tab.

2. Select the delete icon on the score.

3. Tap **Yes**.

   It is confirmed that the score is deleted successfully.

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