



Planon Live - Mobile Condition Assessor app

Planon Software Suite

Version: L105

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About this Document

Intended Audience

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

Contacting us

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

Document Conventions

Bold

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

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols



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

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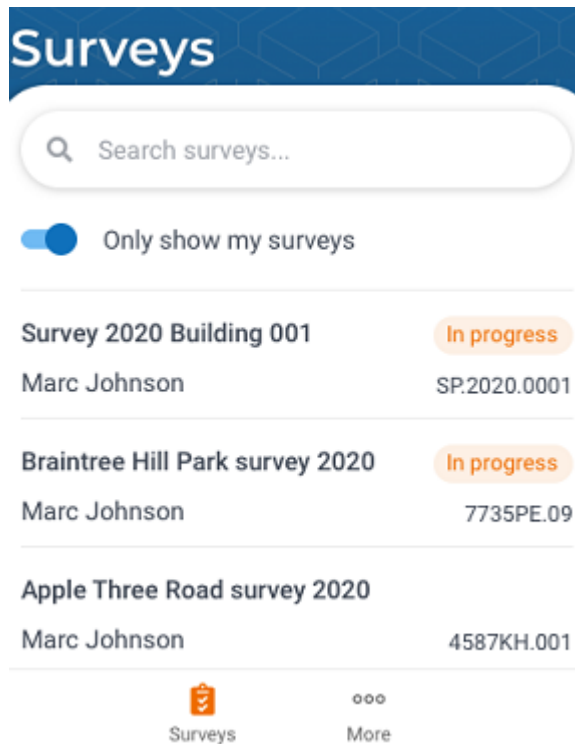
About the Mobile Condition Assessor app

The Mobile Condition Assessor app (MCA) is part of the **Planon Live** app. The Planon Live app is the 'shell' application that you can download from the relevant app store. It can hold various licensed apps, like the Planon Workplace app and the Mobile Condition Assessor app .

The MCA connects to the **Surveys** TSI in Planon ProCenter . With the MCA surveyors can pick up surveys on their mobile device that were initiated in that TSI. Back-office staff will prepare and release the surveys by changing the status of a survey project and the survey. It is not possible to create surveys in the MCA.

The app includes the following forms:

- **Surveys**
- **Property**
- **Survey units**
- **Survey elements**
- **Observed defects**
- **Survey activities**



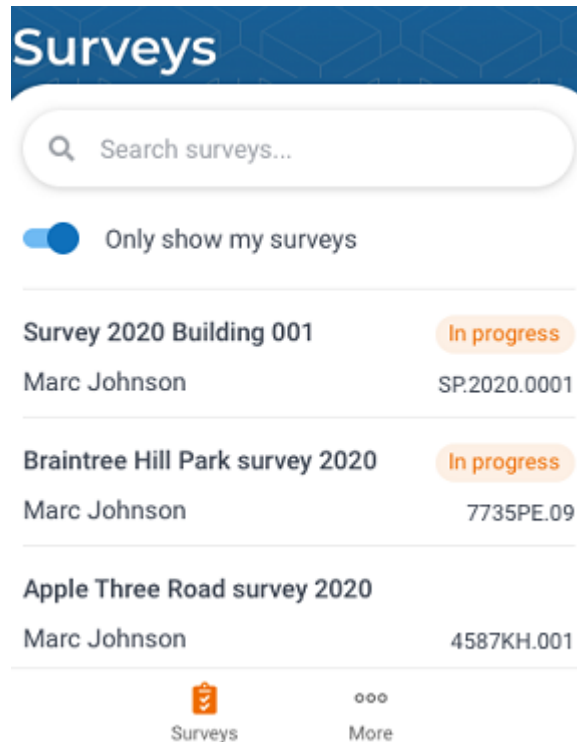
If the status of the survey project is:

- **SP05, In preparation** - Survey is not available in the MCA.
- **SP10, In progress** - Survey is available in the MCA, 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** - Survey is not available in the MCA.

Surveys

A form on the Mobile Condition Assessor app that shows a list of available surveys for the property.

A survey is part of a survey project, aimed at inspecting the condition of assets or building elements in a specific property.

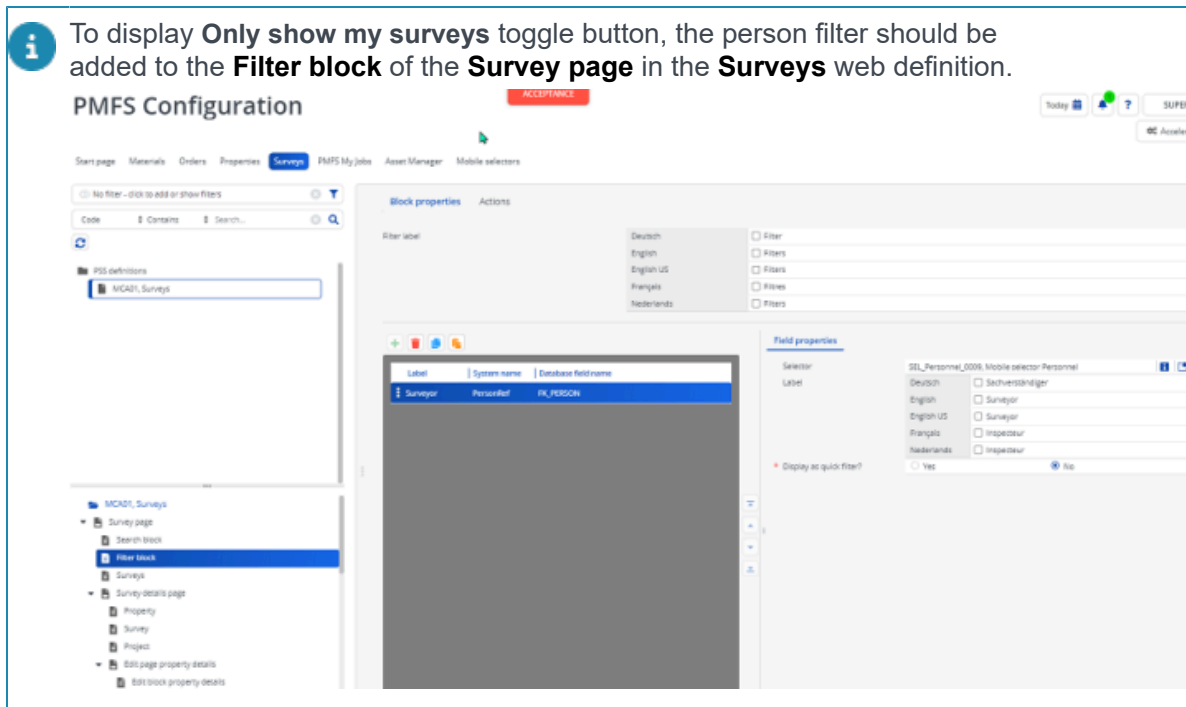


i Surveys with the statuses **11, In progress checked out (Ready for survey)** or **12, In progress - in Planon** are shown in the Mobile Condition Assessor app . **10, In preparation** - preparing survey in Planon ProCenter and not available in the Mobile Condition Assessor app .

By switching the **Only show my surveys** toggle button you can display the surveys that are assigned to you.

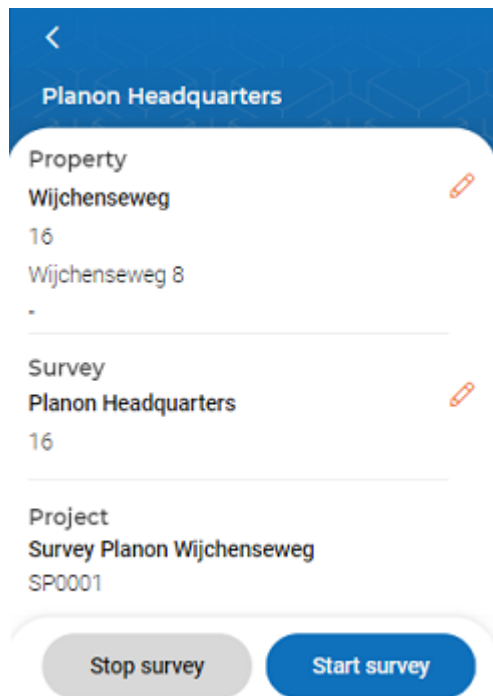


To display **Only show my surveys** toggle button, the person filter should be added to the **Filter block** of the **Survey page** in the **Surveys** web definition.



The **Search field** allows you to search for surveys by entering a code or description of a survey.

If you select a survey, a page is displayed where you can see the details of the property, survey and project linked to the survey.



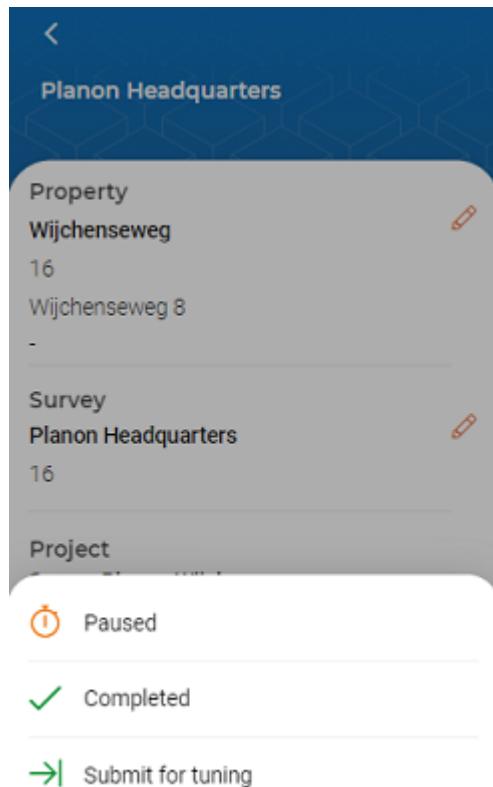
The app allows you to modify the Property details and Survey details by using the **Edit** icon. See [Editing property / survey data](#) .

You can go back to the survey screen by tapping the < icon in the top-left corner.

To start the survey, tap the **Start survey** button.

i In Planon ProCenter, the status of the survey will change to **12, In progress - in Planon** when the survey is started.

To stop the survey, tap **Stop survey** at the bottom of the page. A pop-up appears with the following three options:

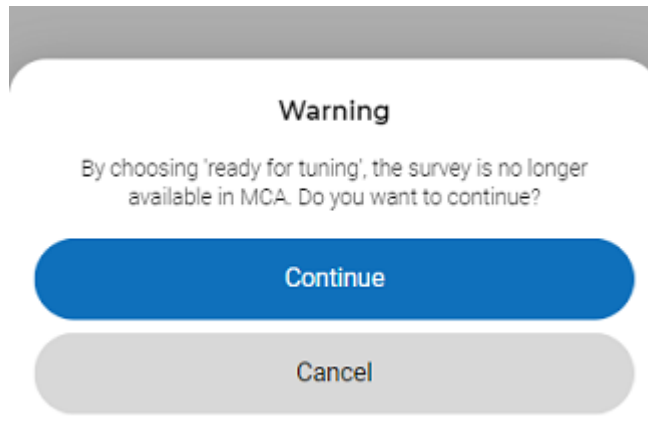


- **Paused:** Select this option if the survey is temporarily paused and will be resumed at a later stage.
- **Finished:** Select this option if the survey is finished.


i When the survey is set to **Finished** it will become available for other surveyors to survey.

- **Submit for tuning:** Select this option if the survey is completed. If you select this option the survey is transferred to the back-office and no longer available on Mobile Condition Assessor app. If you select this

option a warning popup appears, click **continue** to continue and/or



cancel to abort.

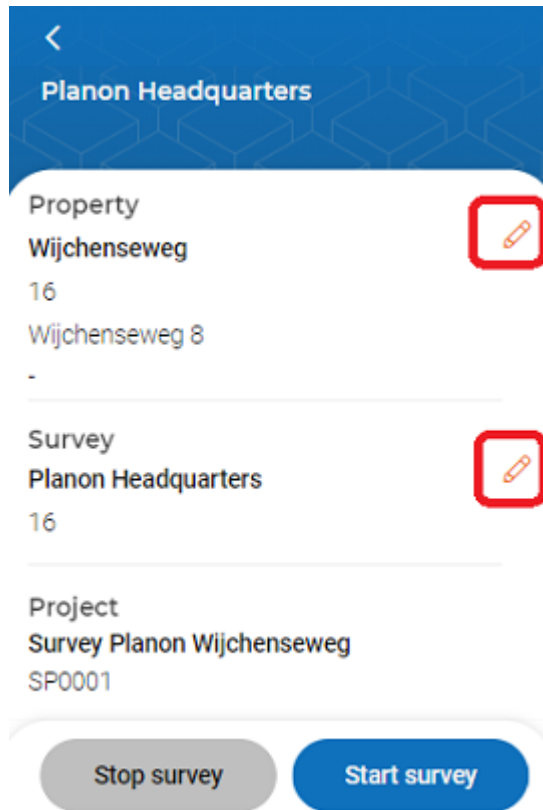
 If the back-office staff changes the survey status **11, In progress - checked out (Ready for survey)**, the survey becomes available again on the Mobile Condition Assessor app .

Editing property / survey data

On the Mobile Condition Assessor app , you can edit **Property** and **Survey** data.

Procedure

1. Click the **Edit** icon on the Property / Survey tab.



 Project information cannot be edited.

An edit form is displayed.

The image shows two side-by-side mobile application screens. The left screen is titled 'Property' and contains the following fields: 'Image' with a photo of a building and a red 'X' icon; 'Property code *' with the value '16'; 'Name *' with the value 'Wijchenseweg'; 'Address' with the value 'Wijchenseweg'; 'House number' with the value '8'; 'ZIP code' with the value 'NL-6537 TL'; and 'Gross area' with the value '475' and a unit 'm²'. A blue 'Submit' button is at the bottom. The right screen is titled 'Survey' and contains: 'Code *' with the value '16'; 'Description' with the value 'Planon Headquarters'; 'Surveyor' with the value 'Adrian, Mease' and a dropdown arrow; and 'Actual survey date' with a calendar icon. A blue 'Submit' button is at the bottom.

2. Edit the relevant data on the form.
3. Add a photo, if required.
4. Tap Submit.

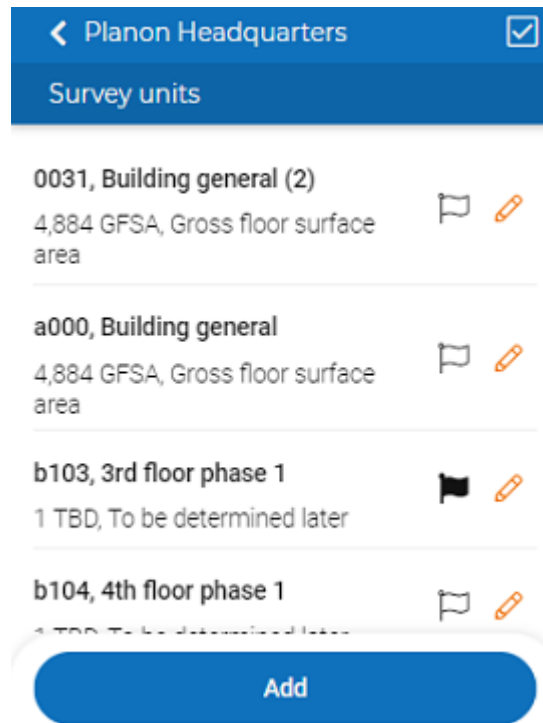
The edited data is added to the property / survey.

Survey units

A form on the Mobile Condition Assessor app that shows a list of available survey units linked to the survey.

A **Survey unit** is a part of a building or building complex that is included in the survey.

The app allows you to add a new survey unit to the survey. To add a survey unit, see [Adding a survey unit](#).



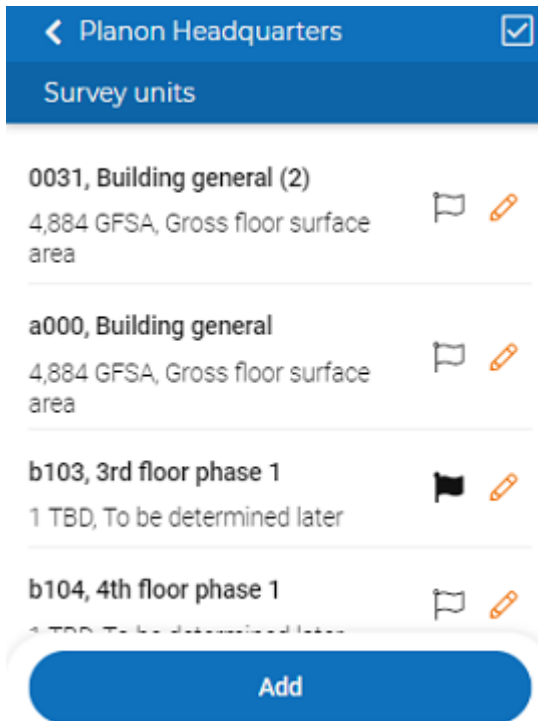
For information on using the **Flag** feature and other MCA features such as **Multi-select**, **Copy** and **Delete**, see [Generic features](#).

Adding a survey unit

On the Mobile Condition Assessor app , you can add a new survey unit to the survey.

Procedure


1. On the Survey units form, tap the Add button.



A new form is displayed.

A screenshot of a mobile application form titled 'Add survey unit'. The form has a blue header bar with a close icon and the text 'Add survey unit'. Below the header are four input fields. The first field is labeled 'Code *' and contains the text '0032'. The second field is labeled 'Description'. The third field is labeled 'Survey site' and contains the text 'Tap to select' with a right-pointing arrow. The fourth field is labeled 'Quantity' and contains the text 'Unit of measurement' and 'Tap to select' with a right-pointing arrow. At the bottom of the form is a large blue button with the text 'Submit'.

2. Fill in the relevant data on the form.
3. Tap Submit.

 When you add a survey unit, it is automatically linked to the active survey.

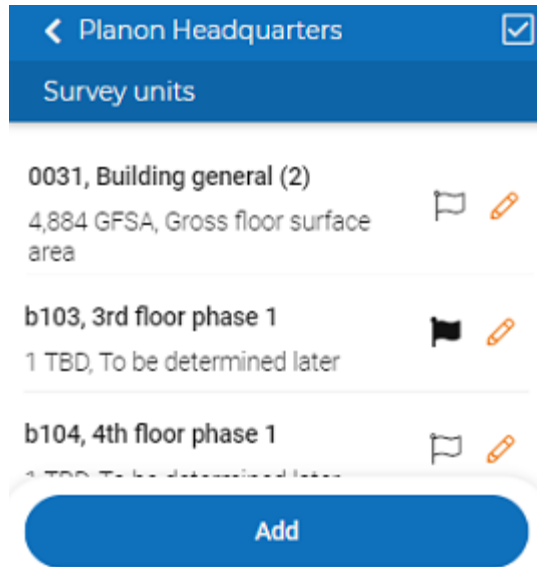
The new survey unit is added to the survey.

Editing a survey unit

On the Mobile Condition Assessor app , you can edit a survey unit.

Procedure

1. Tap the Edit icon of the selected survey unit.



An edit form is displayed.

Survey unit

Code *
0031

Description
Building general (2)

Survey site
1, General

Quantity
4,884

Unit of measurement
GFSA, Gross floor surface area

Photo(s)
+ Add photo

Submit

2. Edit the data on the form as required.
3. To add a photo, click + icon.

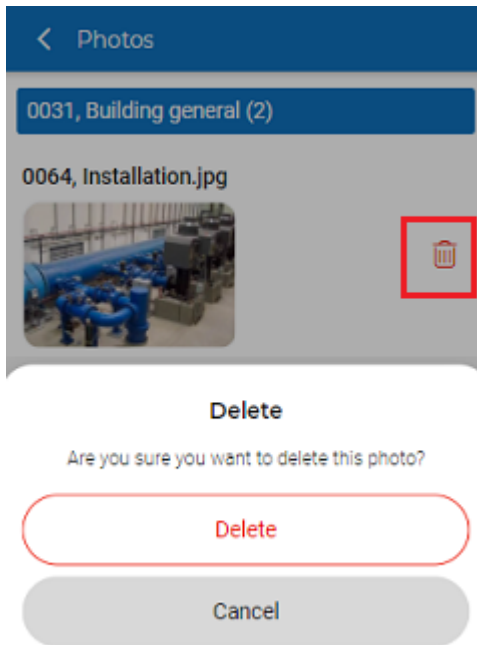
A pop-up appears.

Take a photo

Photo from library

4. Select **Take a photo**, to take photo instantly.
5. Select **Photo from library**, to select photo from library and Submit.
6. Click on the photo button to get an overview of photos linked to the **survey unit**.
7. To delete a photo, click the Delete icon.

In the pop-up, tap Delete. Tap Cancel to quit the deletion process.

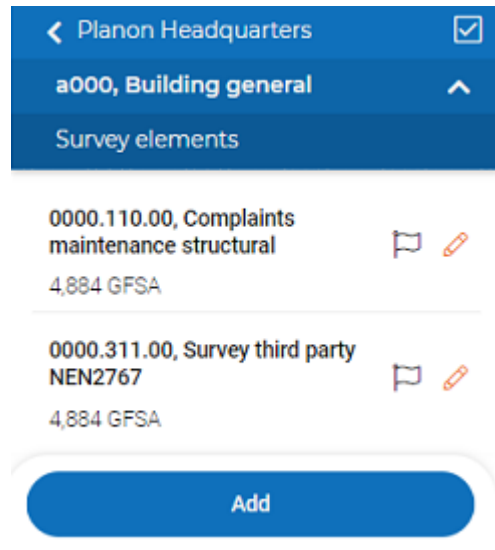


8. Tap Submit.
The data is changed and saved.

Survey elements

A form in the Mobile Condition Assessor app that shows a list of available survey elements linked to the survey unit.

A **Survey element** is an asset or building element whose condition must be surveyed.



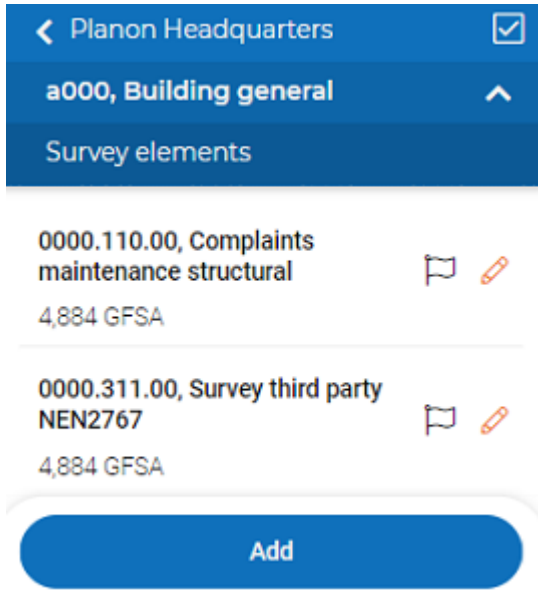
For information on using the **Flag** feature and other MCA features such as **Multi-select**, **Copy** and **Delete**, see [Generic features](#).

Adding a survey element

On the Mobile Condition Assessor app , you can add survey elements to the survey unit. Survey elements are linked to a survey unit in two ways: via the **Register** tab, survey elements that are already part of an asset register of the property and via **Library** tab, survey elements that are not yet part of an asset register of the property and are added as a new survey element with a link to the standard asset from the asset library.

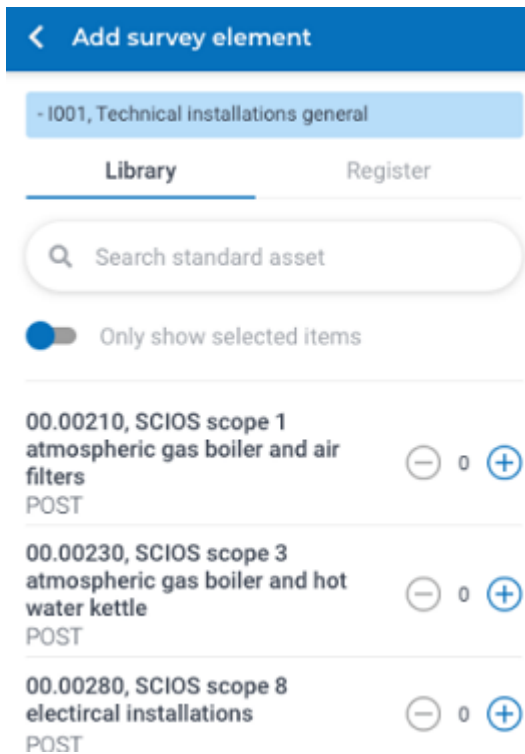
Procedure

1. At the bottom of your Survey elements screen tap Add.



i The assets based on a standard asset are visible while adding a survey element. Adding new assets as a survey element is possible if the maintenance library is linked to the survey project when preparing by the back-office staff.

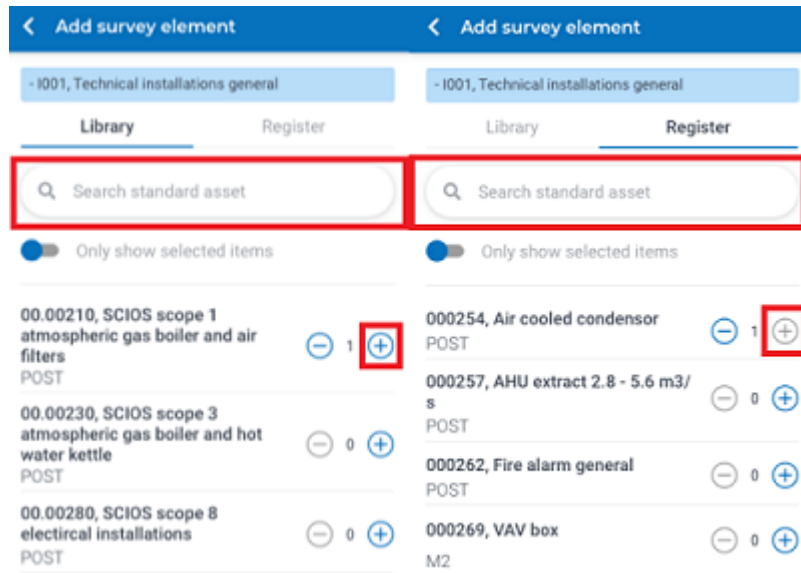
A form is displayed with a **Library** tab and a **Register** tab.



2. Select the survey element from the **Library** / **Register** and add a new one by tapping the plus icon.

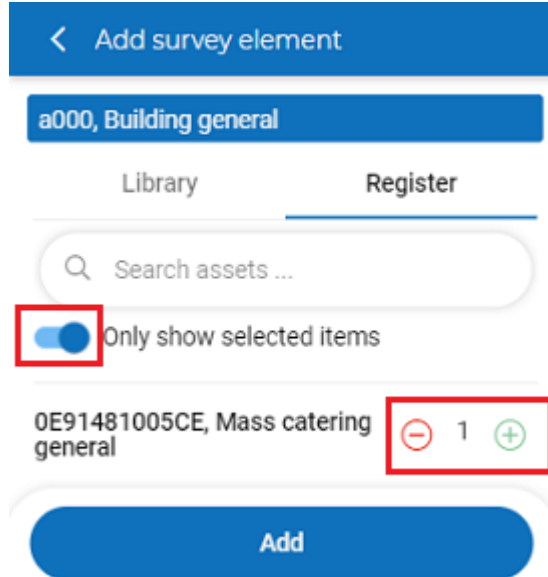


If the survey element is added via **Register**, you can add only one survey element.



The **Search** field allows you to search for survey elements by entering (part of) the code or description of a survey element.

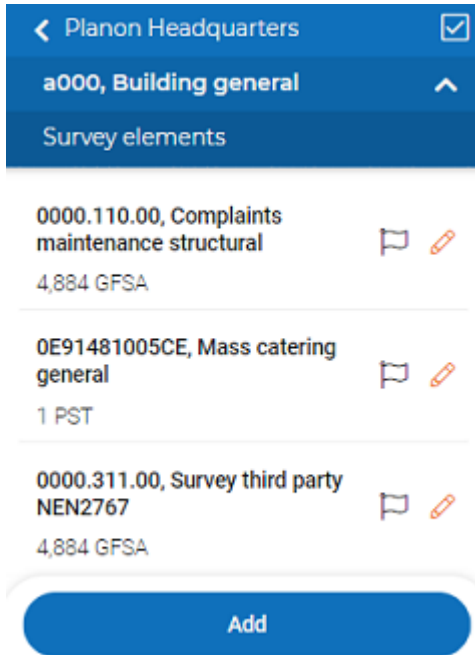
3. Tap the **Only show selected items** toggle button.



You can increase the number of survey elements (added via **Library**) by clicking the plus icon.

A list of new survey elements is displayed.

4. Tap the Add button.



The survey elements are added and linked to the survey unit.


Editing a survey element


On the Mobile Condition Assessor app , you can edit a survey element.


Procedure

1. Tap the Edit icon of the survey element.

← Planon Headquarters ✓
a000, Building general ^
 Survey elements


0000.110.00, Complaints maintenance structural 🚩 
 4,884 GFSA

0E91481005CE, Mass catering general 🚩 
 1 PST

0000.311.00, Survey third party NEN2767 🚩 
 4,884 GFSA

Add

An edit form is displayed.

× Survey element 

Code *
0000.110.00


Description
Complaints maintenance structural

Quantity *
4,884

Unit of measurement
GFSA

Alternative classification
D0, General ⊗ >

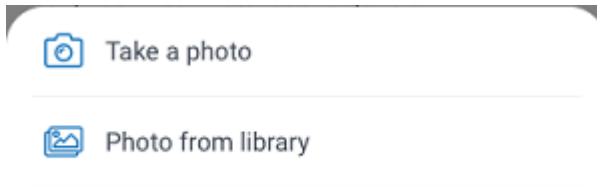
Survey unit *
a000, Building general ⊗ >

Photo(s)
 Add photo

Submit

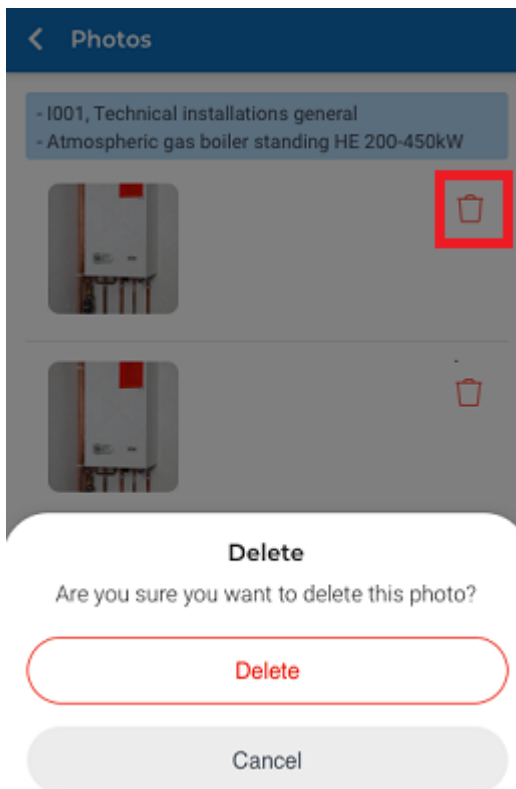
2. Edit the data on the form as required.
3. To add a photo, click + icon.

A pop-up appears.



4. Select **Take a photo**, to take photo instantly.
5. Select **Photo from library**, to select a photo from library and Submit.
6. Click on the photo button to get an overview of photos linked to the **survey element**.
7. To delete a photo, click the Delete icon.

In the pop-up, tap Delete. Tap Cancel to quit the deletion process.

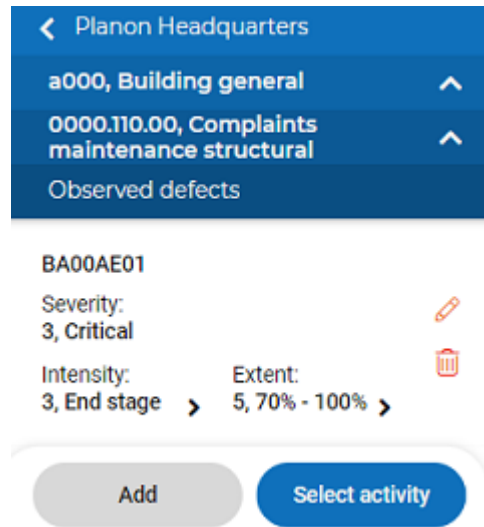


8. Tap Submit.
- The data is changed and saved.**

Observed defects

A form on the Mobile Condition Assessor app that enables you to view the observed defects of survey elements.

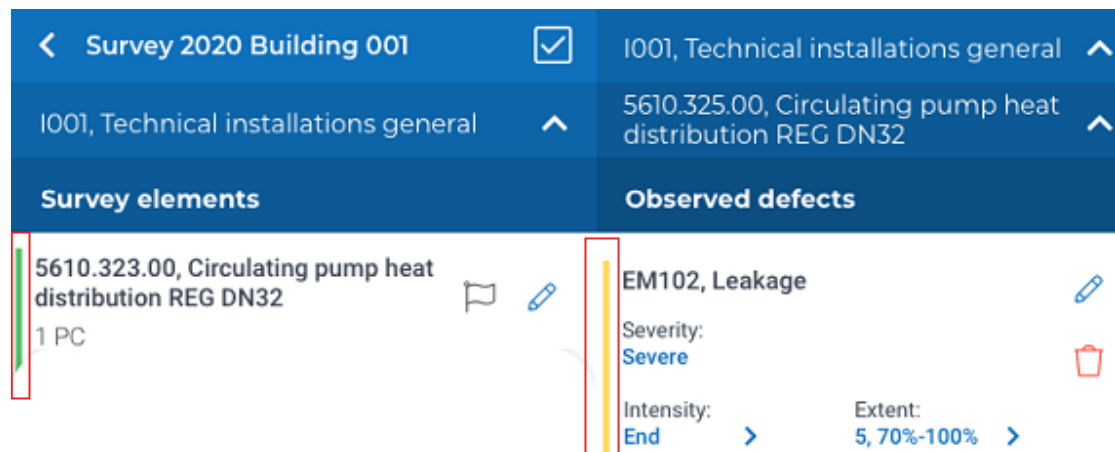
An **Observed defect** is a fault, malfunction or other imperfection in an asset or building element that was found during a survey or investigation.



You can add one or more observed defects to a survey element. To add observed defects, see [Adding an observed defect](#).

You can edit an observed defect. To edit an observed defect, see [Editing an observed defect](#).

The **Condition score** (ranging from 1 to 6) is represented by various colors at the left side of each observed defect and survey element. For the meaning of the various colors, see [Condition score colors](#).





The **Condition score** of an asset is calculated automatically, based on the NEN 2767 method.

You can also link a survey activity to an observed defect. This activity will solve the defect. After this survey activity has been completed, the linked observed defect will be closed. The condition score is changed accordingly. To link a survey activity to an observed defect, see [Selecting an activity](#).

To edit survey activity, see [Editing an activity](#).

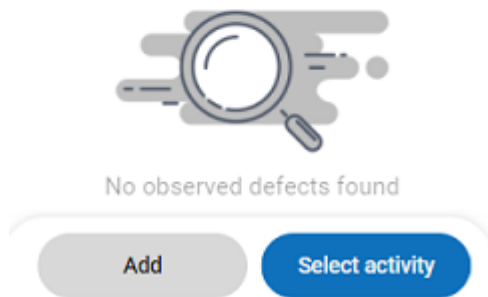
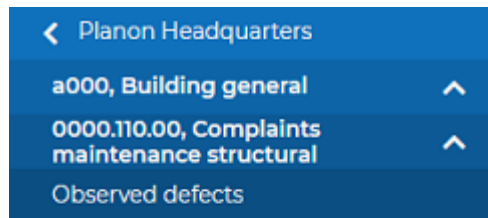
For information on using the **Flag** feature and other MCA features such as **Multi-select**, **Copy** and **Delete**, see [Generic features](#).

Adding an observed defect

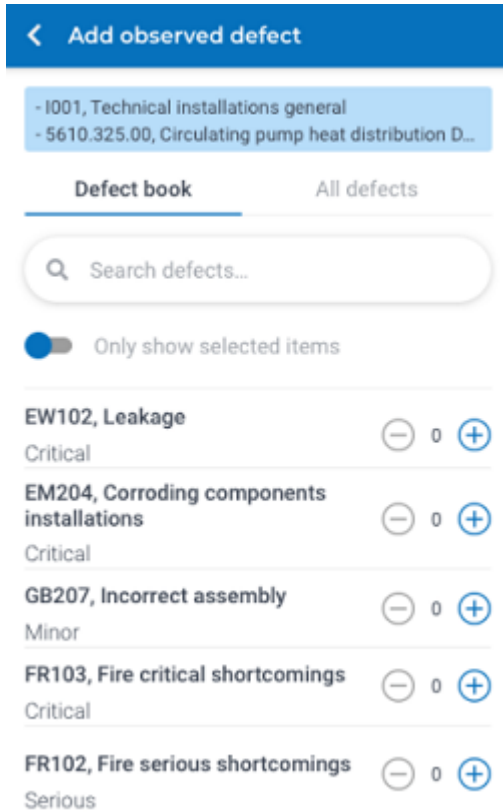
On the Mobile Condition Assessor app , you can add an observed defect to a survey element. Observed defects can be added in two ways: via the **Defects book** tab, which contains defects linked to the standard asset and via the **All defects** tab, which contains all defects.

Procedure

1. At the bottom of your screen tap Add.

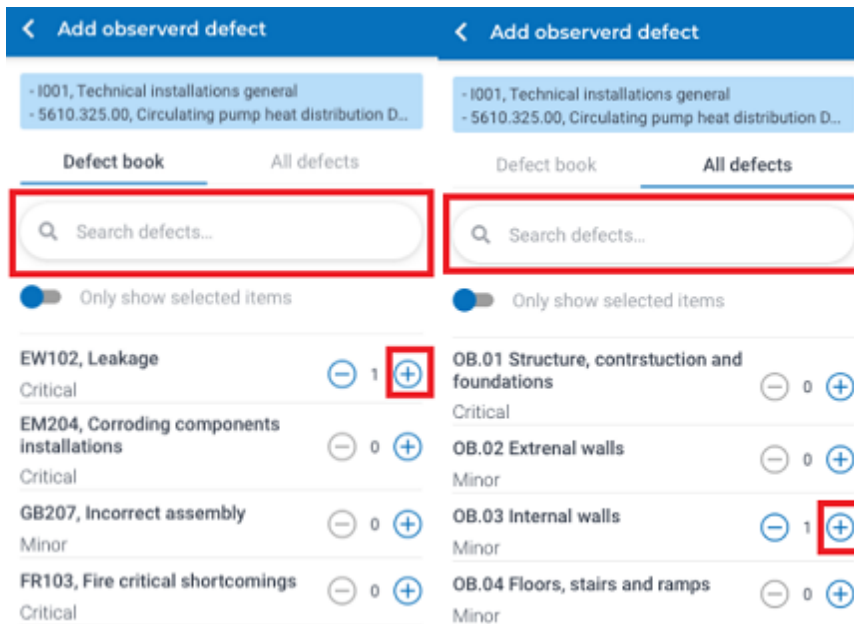


A form is displayed that includes a **Defects book** tab and an **All defects** tab.



i Only unarchived defects are shown in the list. To archive or dearchive a defect(s), see [Supporting data > Defects](#).

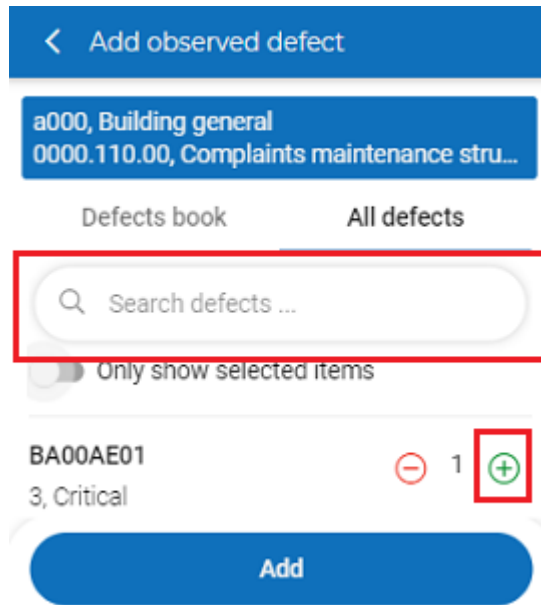
2. On the **Defects book** / **All defects** tab, select the defect by tapping the plus icon.





In the **Search defects** field you can search for defects by entering (part of) the code and description of a defect.

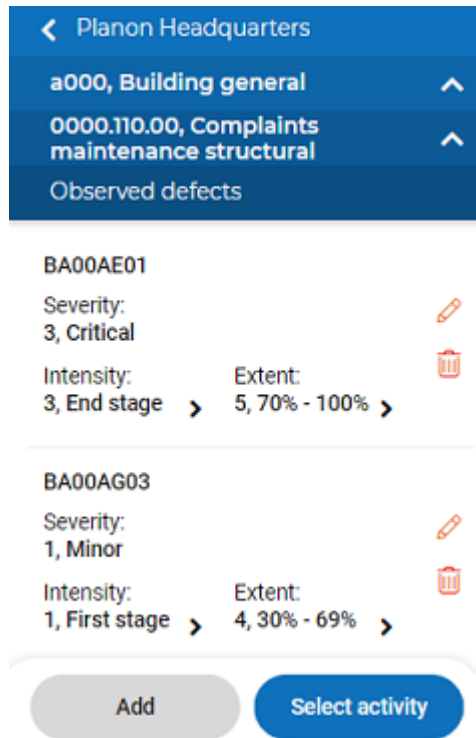
3. Tap the **Only show selected items** toggle button.



You can increase the number of observed defects by clicking the plus icon.

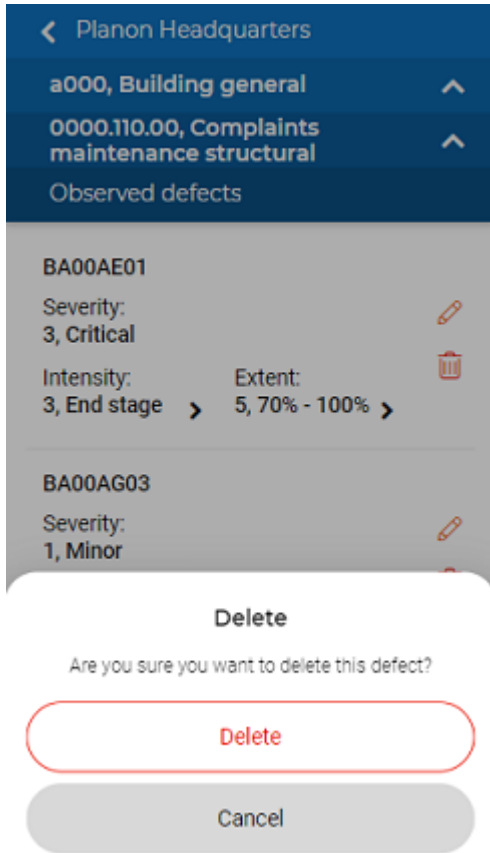
The selected observed defects are displayed.

4. Tap Add.



The observed defects are added to the survey elements.

5. The added observed defect can be deleted by tapping the Delete icon.
6. In the pop-up, tap Delete. Tap Cancel to quit the deletion process.



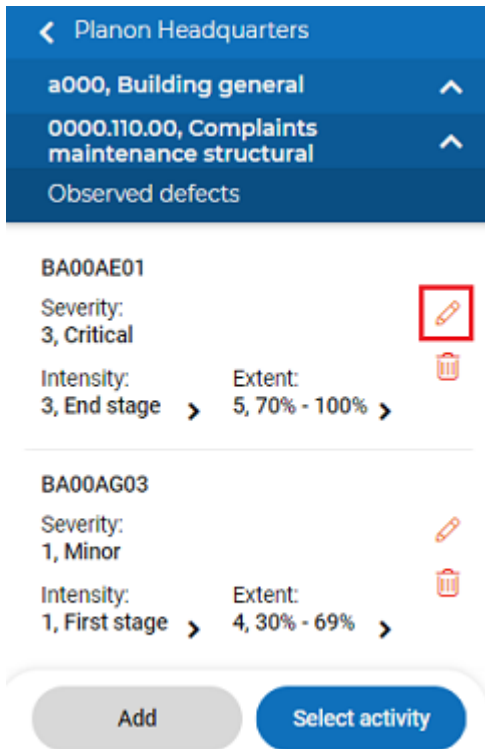
The observed defect is deleted.

Editing an observed defect

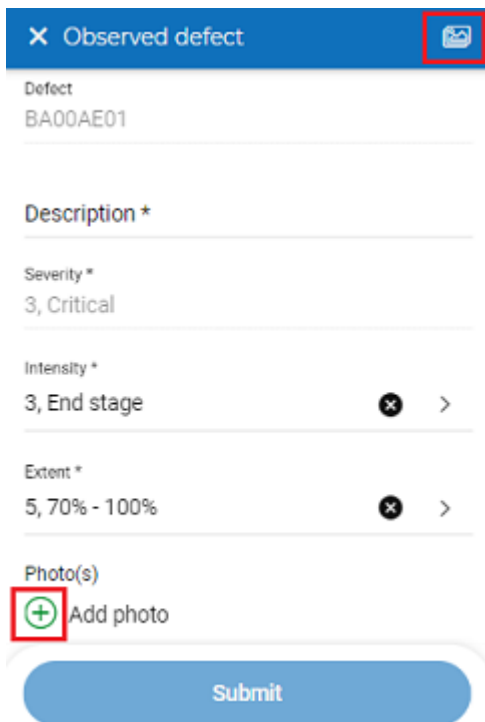
On the Mobile Condition Assessor app , you can edit an observed defect. The values of **Severity**, **Intensity** and **Extent** of each observed defect can be edited in accordance with the survey's results.

Procedure

1. Tap the Edit icon of the observed defect.

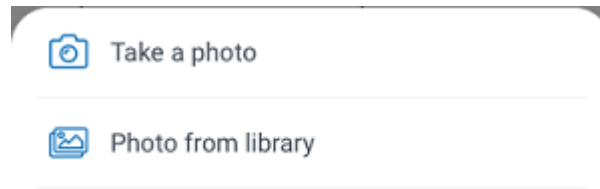


An edit form is displayed.



2. Edit the observation data on the form.
3. To add a photo, click + icon.

A pop-up appears.



4. Select **Take a photo**, to take photo instantly.
5. Select **Photo from library**, to select photo from library and Submit.
6. Click on the photo button to get an overview of photos linked to the **observed defect**.
7. To delete a photo, click the Delete icon.

In the pop-up, tap Delete. Tap Cancel to quit the deletion process.

8. Tap Submit.

The data is changed and saved.

Selecting an activity

On the Mobile Condition Assessor app , you can select an activity to solve the observed defect. You can also add an activity without any observed defects.

Procedure

1. At the bottom of your screen tap Select activity.

< Planon Headquarters

a000, Building general ^

0000.110.00, Complaints maintenance structural ^

Observed defects

BA00AE01

Severity: 3, Critical

Intensity: 3, End stage > Extent: 5, 70% - 100% >

BA00AG03

Severity: 1, Minor

Intensity: 1, First stage > Extent: 4, 30% - 69% >

Add Select activity

A list of standard non-cyclic activities is displayed.

< Add activity

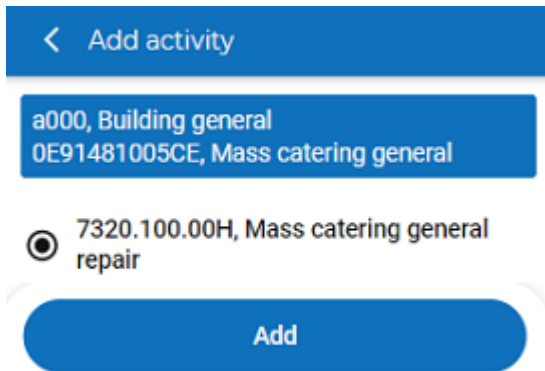
- 1001, Technical installations general

- 5610.325.00, Circulating pump heat distribution D...

5610.325.00H, Recondition circulating pump heat distribution REG DN32

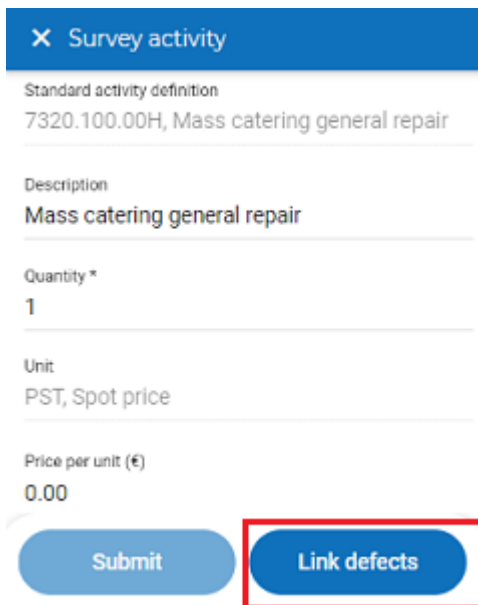
5610.325.00V, Replace circulating pump heat distribution REG DN32

2. Select a relevant activity.



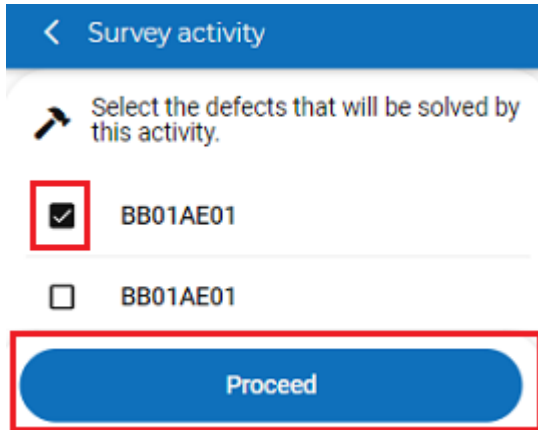
 You can select only one survey activity, which can solve one or multiple defects.

3. Tap Add.

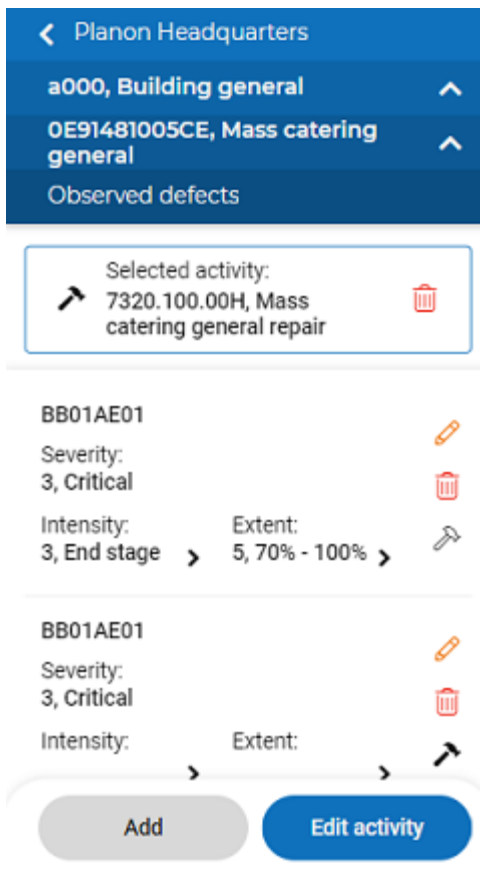


4. Add the relevant data and tap Link defects.

The list of defects is displayed.



5. Select the defect(s) that will be solved by performing the activity.
6. Tap Proceed.



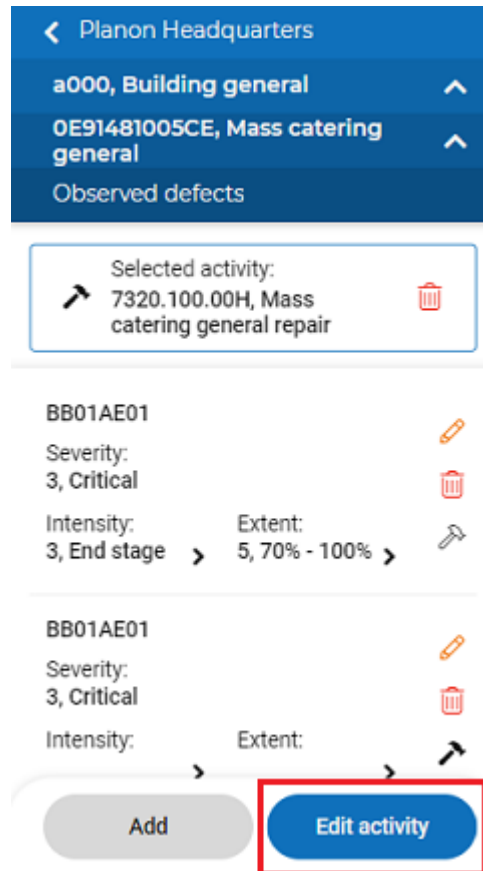
The activity is added.

Editing an activity

On the Mobile Condition Assessor app , you can edit an activity that is linked to an observed defect.

Procedure

1. At the bottom of your screen tap Edit activity.



An edit form is displayed.

✕
Survey activity

Standard activity definition
7320.100.00H, Mass catering general repair

Description
Mass catering general repair

Quantity *
1

Unit
PST, Spot price

Price per unit (€)
0.00

Submit

Link defects

2. Edit the data on the form, as required.
3. Tap Submit.

The data is changed.

Condition score colors

The following table explains which color represents which condition score on the Mobile Condition Assessor app :

| Condition score | Color |
|-----------------|-----------------|
| 1 | Green - dark |
| 2 | Green - regular |
| 3 | Green - light |
| 4 | Yellow |
| 5 | Orange |
| 6 | Red |
| 0 | No color |

Generic features

The Mobile Condition Assessor app includes several generic features.

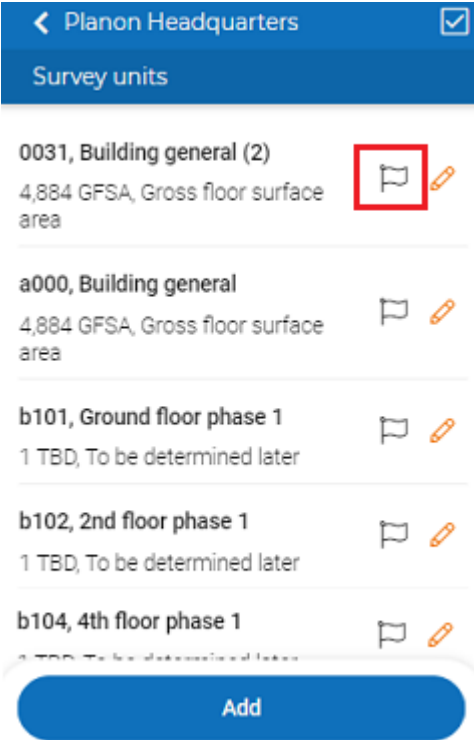
The generic features of the Mobile Condition Assessor app include: **Flag**, **Multi-select**, **Copy** and **Delete**.

Flag

The **flag** icon clearly distinguish surveyed and non-surveyed items. To keep the track of surveyed survey units and survey elements, you can select the **flag** ion. To configure the flag icon in Mobile Condition Assessor app , in Planon ProCenter add **Survey Result** field in layout panel of Survey unit TSI. For more information, see [Layouts](#).

The below picklist items can be added to the **Survey Result** field by the authorized user.

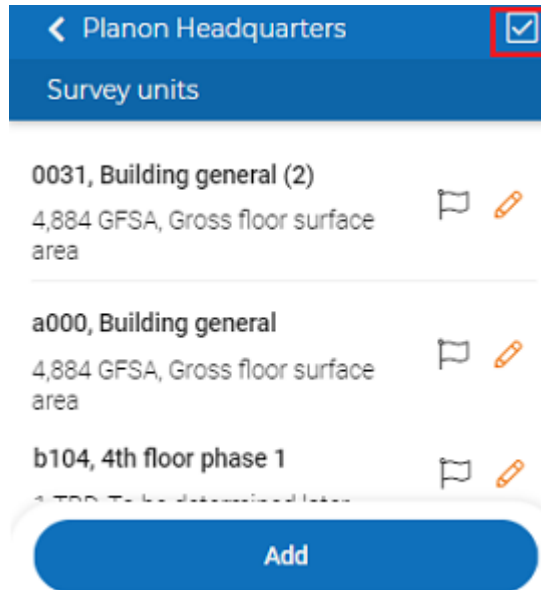
| CODE | DESCRIPTION |
|------|------------------|
| 0 | Not Surveyed |
| 1 | Surveyed |
| 2 | Unable to survey |
| 3 | Others |
| 4 | Etc |



If you click the toggle button at the top of the screen the non-surveyed survey units and survey elements are shown. When survey result is not defined in the choice list then the toggle button is hidden.

Multi-select

You can perform the functions like **Flag**, **Copy** and **Delete** for multiple survey units, survey elements and observed defects at a time by using **Multi-select** icon.



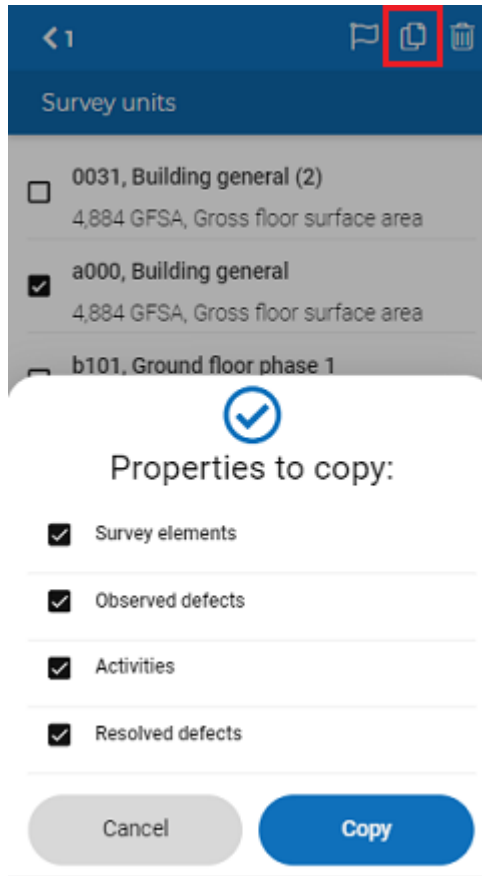
Copy

You can copy and duplicate the survey units and survey elements using **copy** icon. By tapping **copy** icon a pop-up appears. Tap **Duplicate**, to copy or **Cancel** to undo the process of copying.

The **Copy** feature in the Mobile Condition Assessor app allows deep copying (that is copying the survey unit / survey element together with its associated items except the communication log of survey element and observed defect).

You can copy **Observed defects** and **Activities**, if the **Survey elements** are copied / selected.

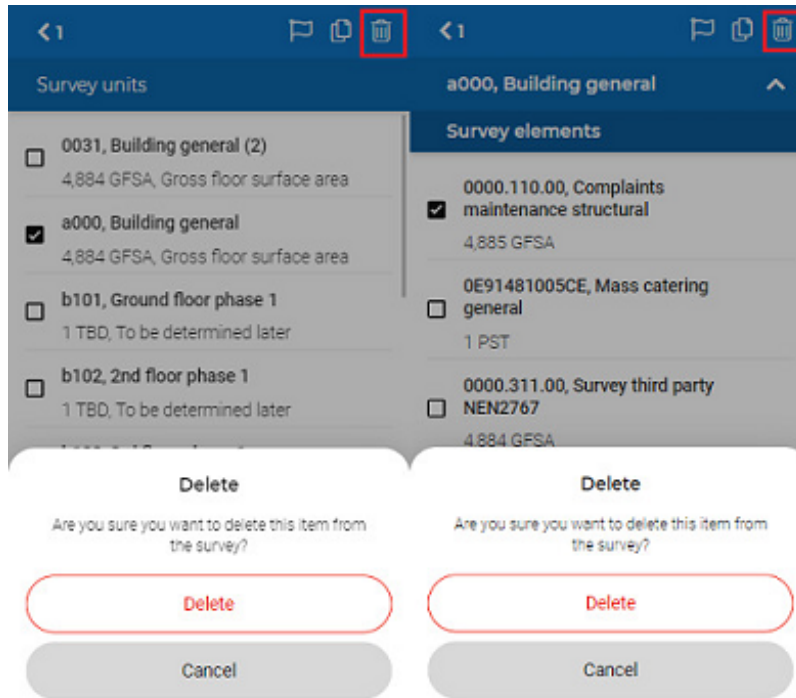
You can copy **solved defects**, if the **Observed defects** and **Activities** are copied / selected.



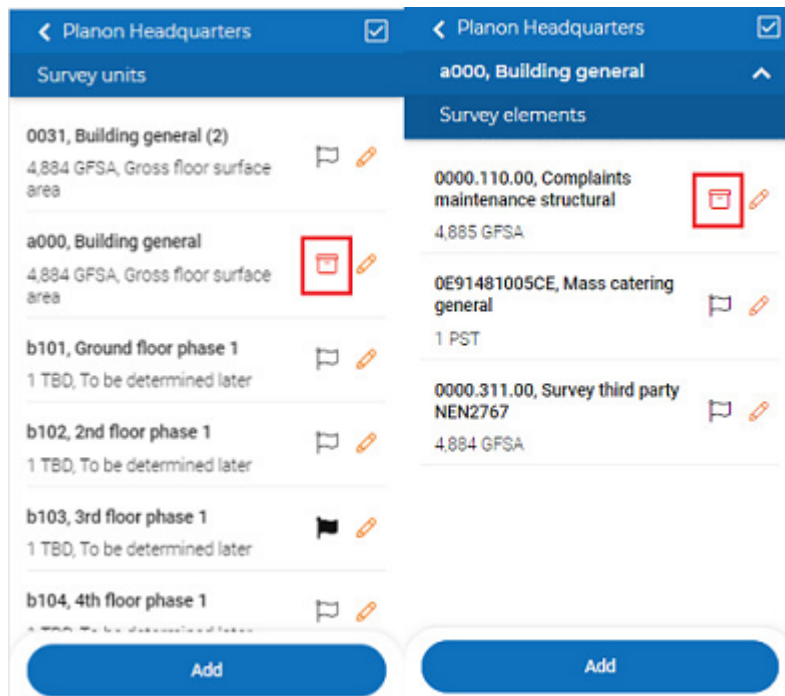
i If the survey unit consists of survey elements linked to an asset from the asset library of the property, then the survey unit can be copied, but not the associated survey elements. If a survey unit consists of survey elements linked to an asset from the asset register of the property, then the survey elements are copied as a new survey element with reference to a standard asset from the asset library.

Delete

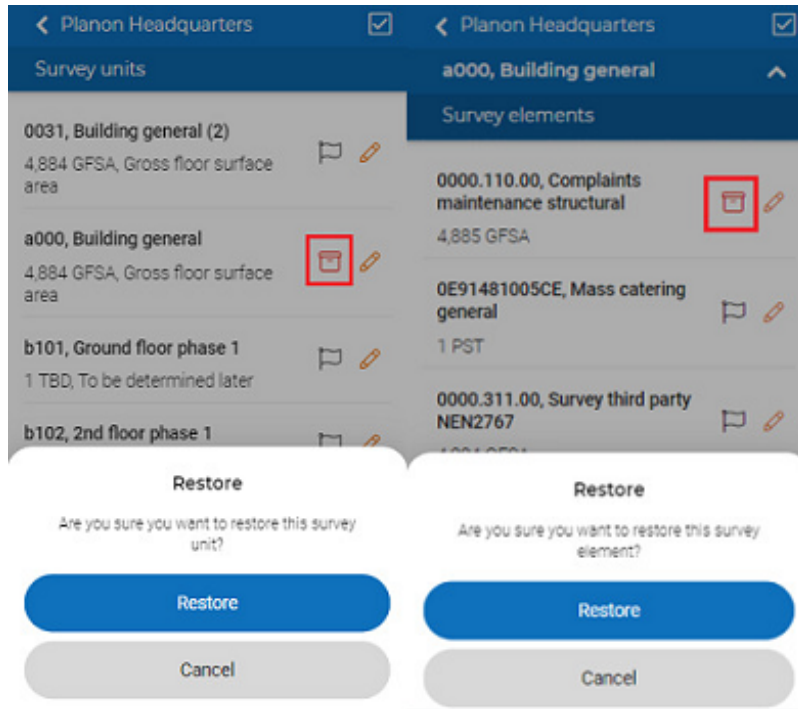
You can delete the selected survey units, survey elements and observed defects using **delete** icon. By tapping the **delete** icon a pop-up appears. Tap **Delete**, to delete or **Cancel** to undo the process of deletion.



If the survey element is linked to an asset from the register, then the survey unit / survey element is not really deleted. The **Survey Result** status of the survey unit / survey element in Planon ProCenter is set to deleted and deleted symbol appears for the survey unit / survey element.

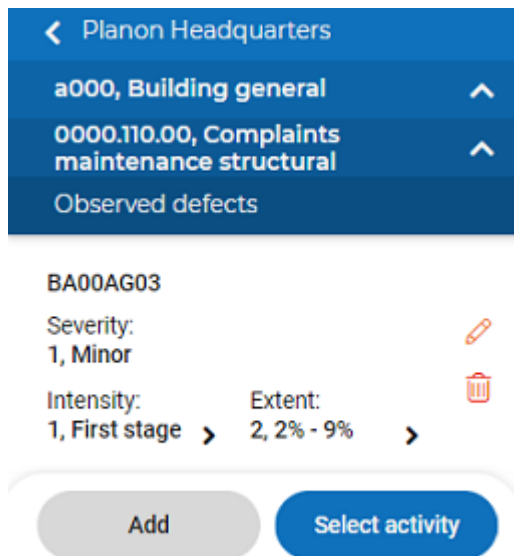


You can restore the survey unit / survey element by tapping a **deleted** icon a pop-up appears. Tap **Restore**, to restore or **Cancel** to undo the process.



The Mobile Condition Assessor app features a < icon in the top-left corner that opens a previous screen by tapping.

You can always check on which survey, survey unit and survey elements you are working on at the top of the page.

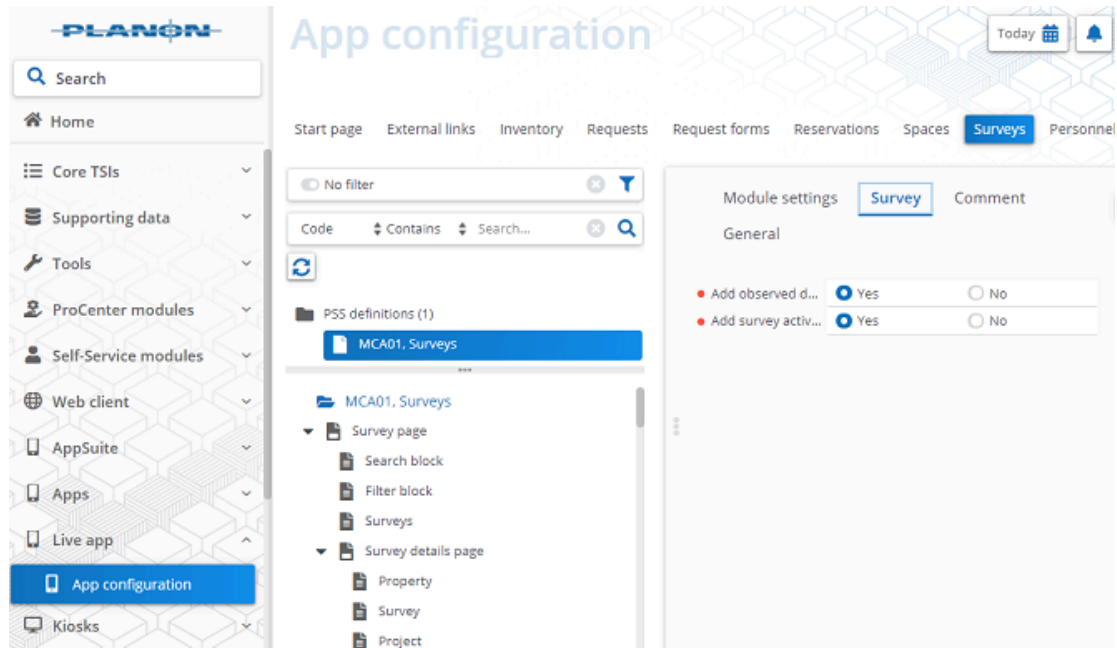


Submit

Submit button is enabled only when you edit the information in the list.

MCA Settings

You can determine the behavior of Mobile Condition Assessor app , by setting the values of **Add observed defect?** and **Add survey activity?** in the Planon ProCenter .



- Select **Add observed defect?** and **Add survey activity?** to **Yes** to add and / or modify observed defects and survey activities.

i By default, **Add observed defect?** and **Add survey activity?** are set to **Yes**.

- Select **Add observed defect?** to **Yes** and **Add survey activity?** to **No** to add and / or modify only observed defects.

i In this case, you can modify and / or delete existing survey activities but adding new survey activity is not possible.

- Select **Add observed defect?** to **No** and **Add survey activity?** to **Yes** to add and / or modify only survey activities.

i In this case, you can modify and / or delete existing observed defect but adding new observed defect is not possible.

- If you select both **Add observed defect?** and **Add survey activity?** to **No**, neither the observed defect nor the survey activity is added.

i In this case, you can modify and / or delete an existing observed defect / survey activity but adding a new observed defect / survey activity is not possible.

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