



Planon app - Mobile Condition Assessor

Planon Software Suite

Version: L126

Planon
Building Connections

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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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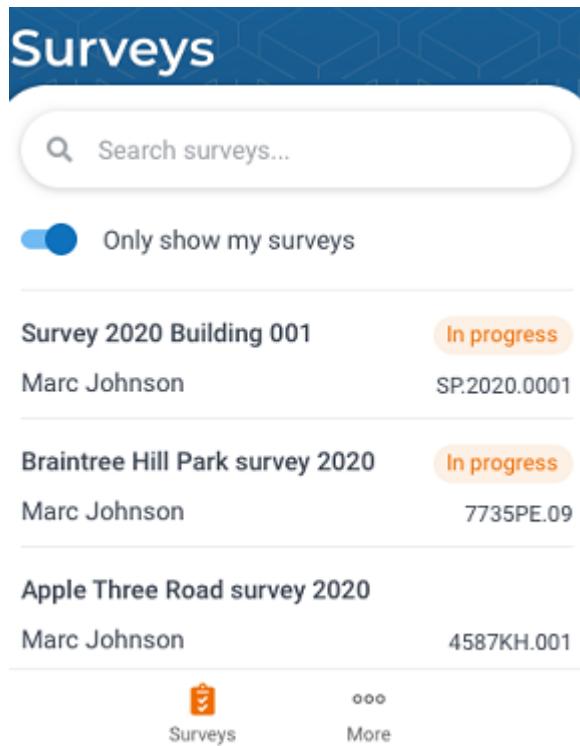
About the Mobile Condition Assessor

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

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 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.

Survey 2020 Building 001	In progress
Marc Johnson	SP.2020.0001
<hr/>	
Braintree Hill Park survey 2020	In progress
Marc Johnson	7735PE.09
<hr/>	
Apple Three Road survey 2020	
Marc Johnson	4587KH.001

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 . **10, In preparation -** preparing survey in Planon ProCenter and not available in the Mobile Condition Assessor .

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

i 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 screenshot shows the PMFS Configuration interface. The top navigation bar includes 'Start page', 'Materials', 'Orders', 'Properties', 'Surveys' (which is the active tab), 'PMFS My Jobs', 'Asset Manager', and 'Mobile selectors'. The top right corner has buttons for 'Today', 'SUPER!', and 'Accelerate'. The main area is titled 'PMFS Configuration' with a red 'ACCEPTANCE' button. On the left, a sidebar shows a tree structure with 'MCAD1, Surveys' selected, under which 'Survey page', 'Search block', 'Filter block' (which is highlighted in blue), and 'Survey details page' are listed. The main content area shows the 'Block properties' and 'Field properties' tabs for the 'Survey' block. The 'Block properties' tab shows the 'Label' as 'Survey' and the 'System name' as 'FK_PERSON'. The 'Field properties' tab shows a list of personnel with checkboxes for 'Filter' and 'Filters'.

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 screenshot shows the survey details page for 'Planon Headquarters'. It displays property details: 'Wijchenseweg 16' and 'Wijchenseweg 8'. It also displays survey details: 'Planon Headquarters 16'. Below that, it displays project details: 'Survey Planon Wijchenseweg' and 'SP0001'. At the bottom, there are two buttons: 'Stop survey' and 'Start survey'.

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

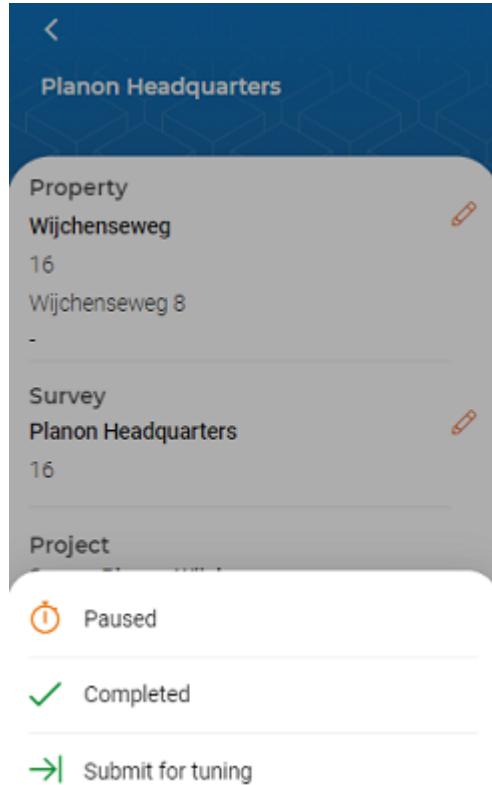
You can go back to the survey screen by tapping the < icon in the top-left corner.

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



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:

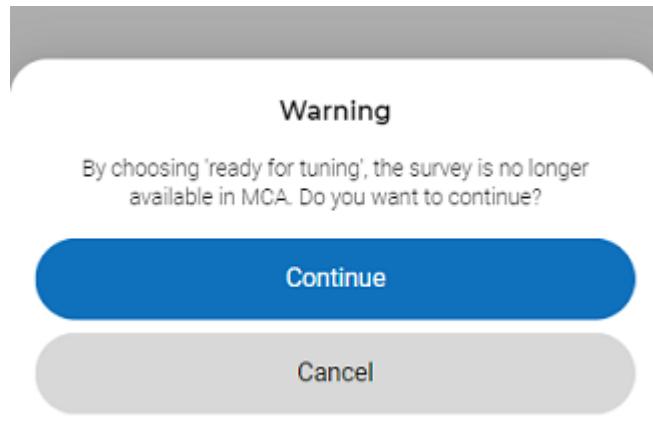


- **Finished:** Select this option if the survey is finished.



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

- **Paused:** Select this option if the survey is temporarily paused and will be resumed at a later stage.
- **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. If you select this option a warning popup appears, click **continue** to continue and/or **cancel** to abort.



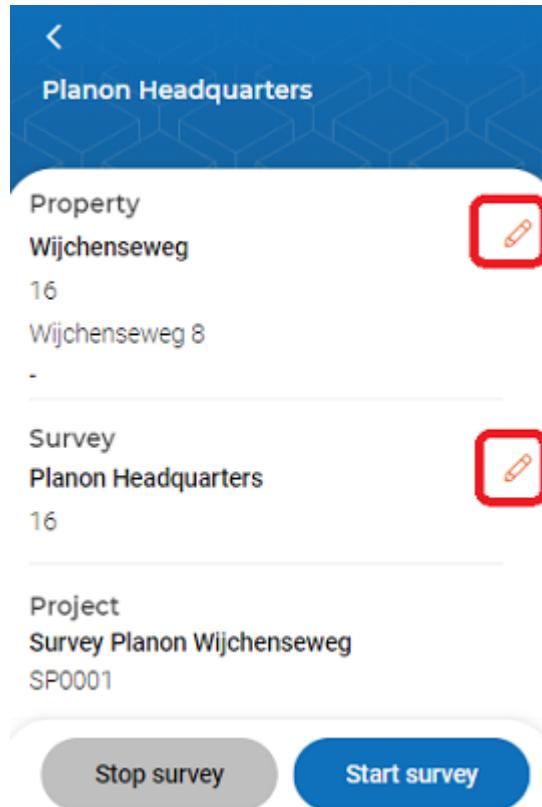
i If the back-office staff changes the survey status **11, In progress - checked out (Ready for survey)**, the survey becomes available again on the Mobile Condition Assessor .

Editing property / survey data

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

Procedure

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





An edit form is displayed.

X Property		X Survey	
Image	 X	Code *	16
Property code *	16	Description	Planon Headquarters
Name *	Wijchenseweg	Surveyor	Adrian, Mease X >
Address	Wijchenseweg	Actual survey date	Calendar icon
House number	8	Submit	
ZIP code	NL-6537 TL	Submit	
Gross area	475	m ²	

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

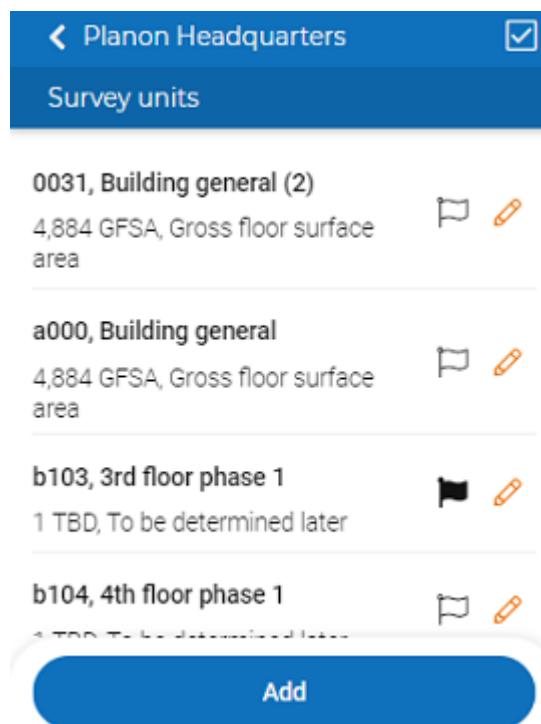
The edited data is added to the property / survey.

Survey units

A form on the Mobile Condition Assessor 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 , you can add a new survey unit to the survey.

Procedure

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

0031, Building general (2)
4,884 GFSA, Gross floor surface area

a000, Building general
4,884 GFSA, Gross floor surface area

b103, 3rd floor phase 1
1 TBD, To be determined later

b104, 4th floor phase 1

Add

A new form is displayed.

× Add survey unit

Code *

0032

Description

Survey site
Tap to select >

Quantity

Unit of measurement
Tap to select >

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.

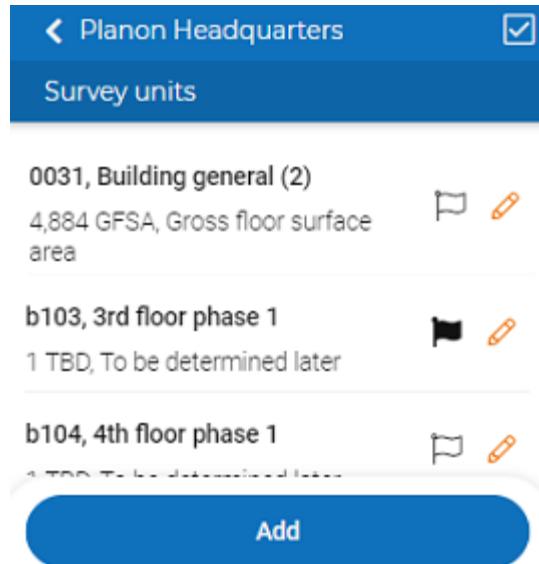
The new survey unit is added to the survey.

Editing a survey unit

On the Mobile Condition Assessor , 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

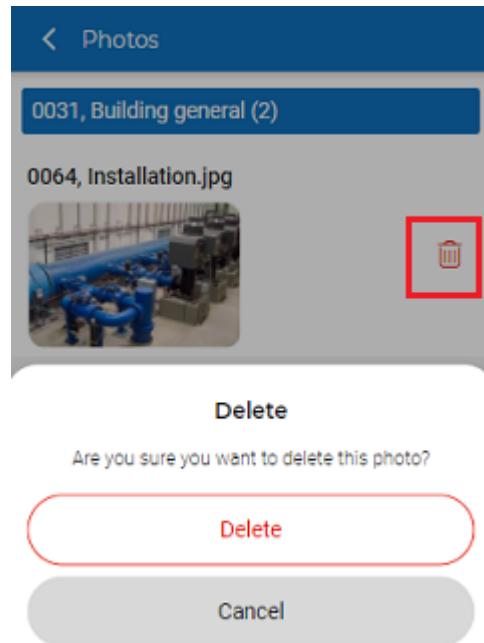
2. Edit the data on the form as required.
3. To add a photo, click + icon.

A pop-up appears.



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.



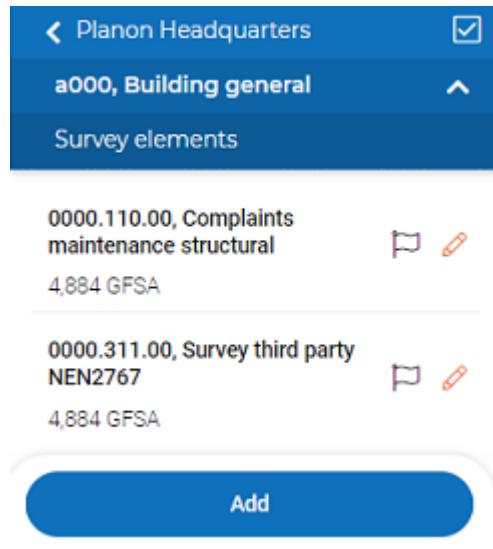
8. Tap Submit.

The data is changed and saved.

Survey elements

A form in the Mobile Condition Assessor 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.



Survey element	Flag	Edit	Count
0000.110.00, Complaints maintenance structural NEN2767			4,884 GFSA
0000.311.00, Survey third party			4,884 GFSA

Add

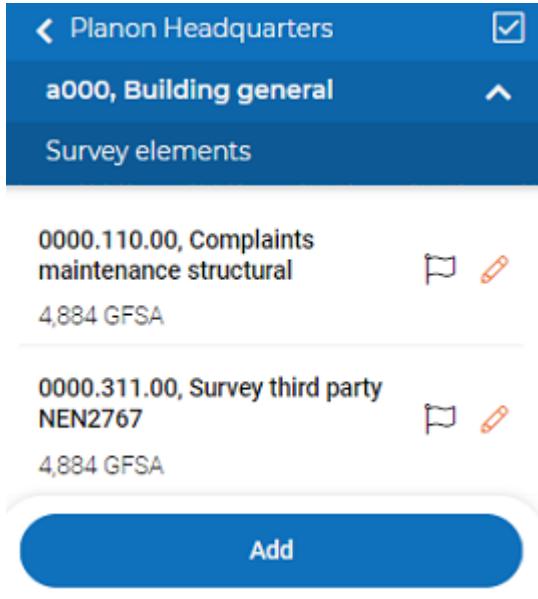
For information on using the **Flag** feature and other MCA features such as **Multi-select**, **Copy** and **Delete**, see [Generic features](#).

Adding a survey element

On the Mobile Condition Assessor , 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.

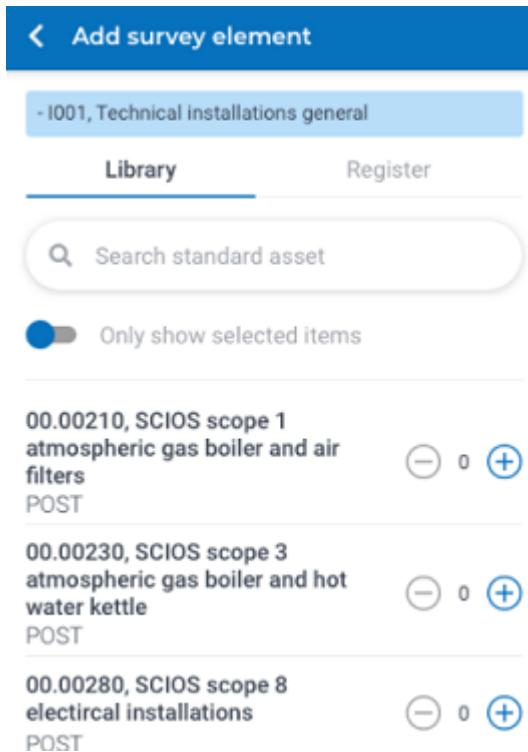
Procedure

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

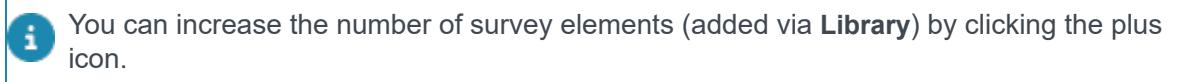
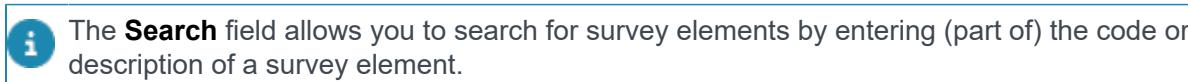
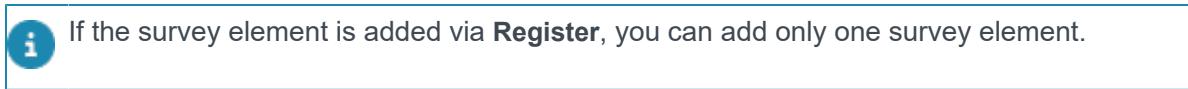


i The assets based on a standard asset are visible while adding a survey element. Adding new assets as a survey element is possible if the maintenance library is linked to the survey project when preparing by the back-office staff.

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

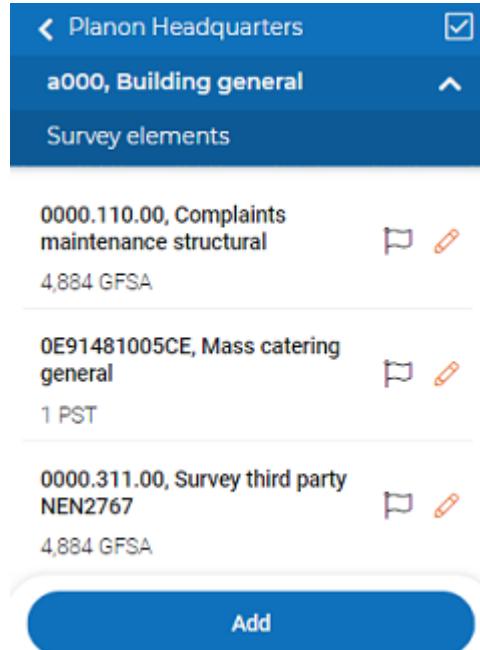


2. Select the survey element from the **Library / Register** and add a new one by tapping the plus icon.



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 , 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

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)

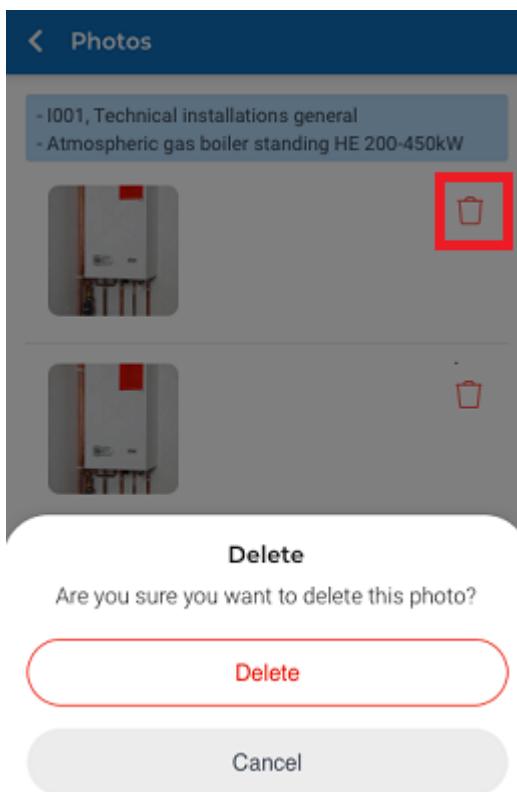
2. Edit the data on the form as required.
3. To add a photo, click + icon.

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.



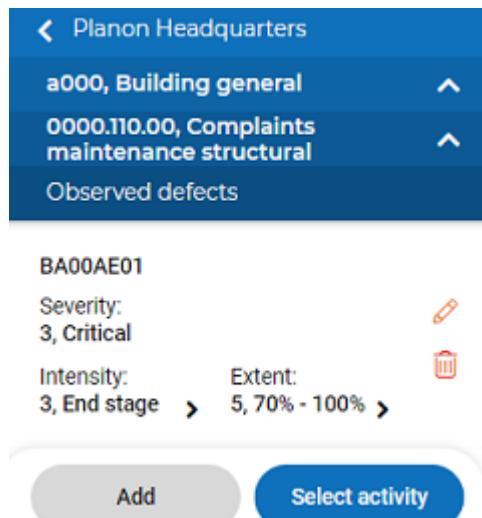
8. Tap Submit.

The data is changed and saved.

Observed defects

A form on the Mobile Condition Assessor 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.

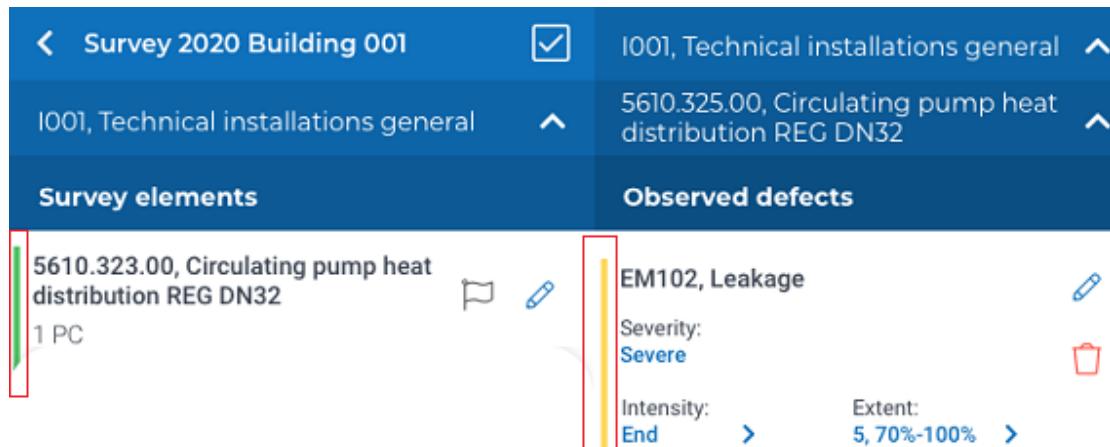


The screenshot shows a mobile application interface for surveying. At the top, a navigation bar shows the path: Planon Headquarters > a000, Building general > 0000.110.00, Complaints maintenance structural > Observed defects. Below this, a survey element is listed: BA00AE01. The details for this element are: Severity: 3, Critical (with a pencil icon); Intensity: 3, End stage (with a right arrow icon); and Extent: 5, 70% - 100% (with a right arrow icon). At the bottom of the screen are two buttons: 'Add' and 'Select activity'.

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 screenshot shows a table with two columns: 'Survey elements' and 'Observed defects'. The 'Survey elements' column lists: I001, Technical installations general (with a checkmark icon) and 5610.325.00, Circulating pump heat distribution REG DN32 (with an upward arrow icon). The 'Observed defects' column lists: EM102, Leakage (with a pencil icon); Severity: Severe (with a red trash icon); Intensity: End (with a right arrow icon); and Extent: 5, 70%-100% (with a right arrow icon). A red box highlights the survey element 5610.323.00, Circulating pump heat distribution REG DN32, and a green box highlights the observed defect EM102, Leakage.



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](#).

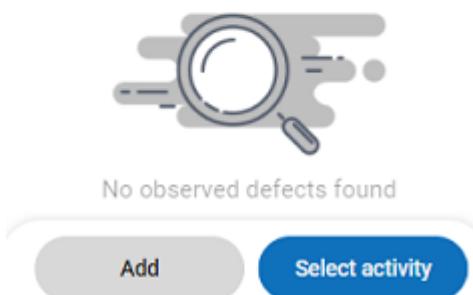
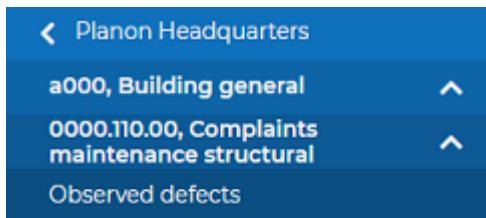
For information on using the **Flag** feature and other MCA features such as **Multi-select**, **Copy** and **Delete**, see [Generic features](#).

Adding an observed defect

On the Mobile Condition Assessor, 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.

< Add observed defect

- I001, Technical installations general
- 5610.325.00, Circulating pump heat distribution D...

Defect book

All defects

Search defects...

Only show selected items

EW102, Leakage

Critical

(-) 0 (+)

EM204, Corroding components
installations

Critical

(-) 0 (+)

GB207, Incorrect assembly

Minor

(-) 0 (+)

FR103, Fire critical shortcomings

Critical

(-) 0 (+)

FR102, Fire serious shortcomings

Serious

(-) 0 (+)



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.

< Add observed defect

- I001, Technical installations general
- 5610.325.00, Circulating pump heat distribution D...

Defect book All defects Defect book All defects

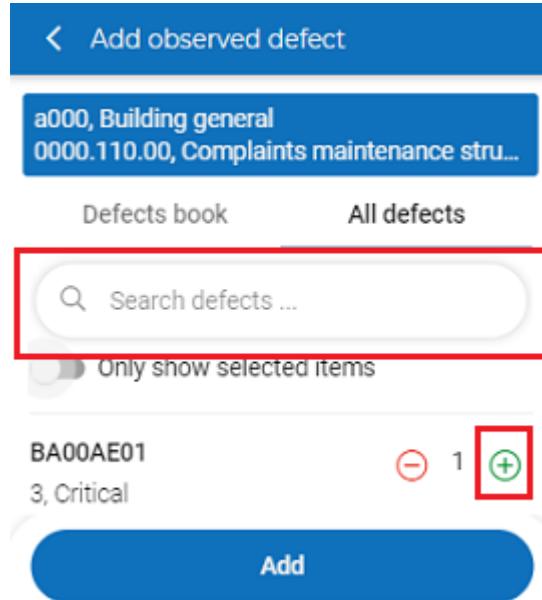
Search defects... Search defects...

Only show selected items Only show selected items

EW102, Leakage Critical (-) 1 (+)	OB.01 Structure, construction and foundations Critical (-) 0 (+)
EM204, Corroding components installations Critical (-) 0 (+)	OB.02 External walls Minor (-) 0 (+)
GB207, Incorrect assembly Minor (-) 0 (+)	OB.03 Internal walls Minor (-) 1 (+)
FR103, Fire critical shortcomings Critical (-) 0 (+)	OB.04 Floors, stairs and ramps Minor (-) 0 (+)

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

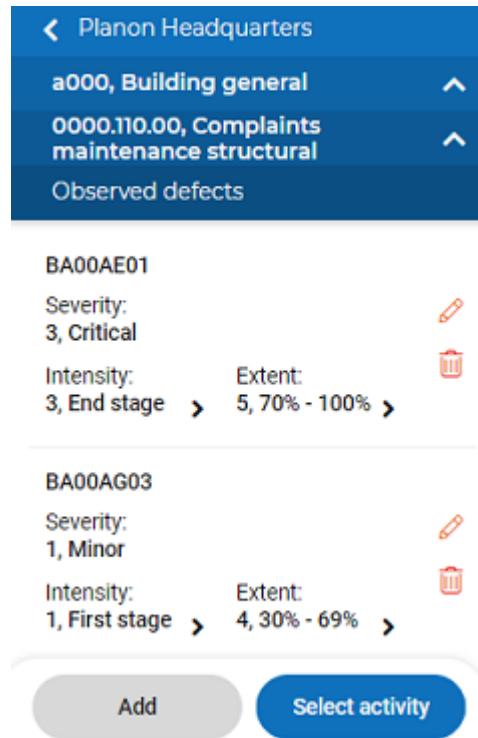
3. Tap the **Only show selected items** toggle button.



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

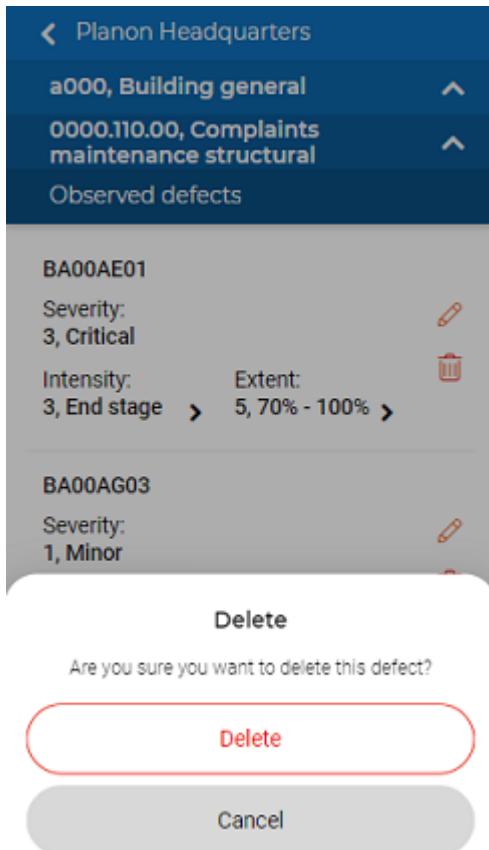
The selected observed defects are displayed.

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 , 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.

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

An edit form is displayed.

Observed defect

Defect

BA00AE01

Description *

Severity *

3, Critical

Intensity *

3, End stage

Extent *

5, 70% - 100%

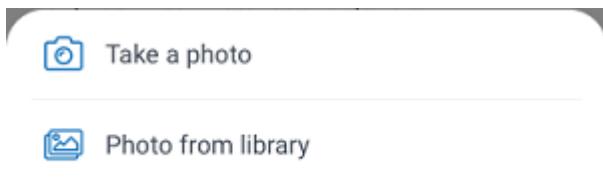
Photo(s)

Add photo

Submit

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 , you can select an activity to solve the observed defect. You can also add an activity without any observed defects.

Procedure

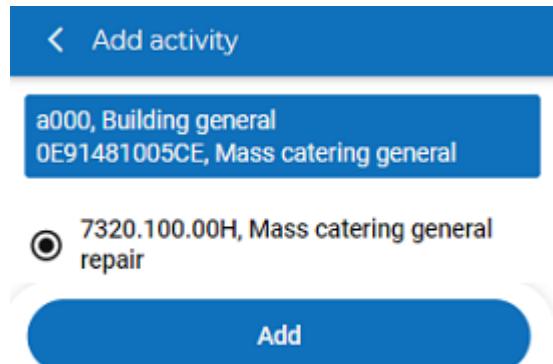
1. At the bottom of your screen tap Select activity.

The screenshot shows a software interface for managing defects. At the top, a navigation bar displays the project name 'Planon Headquarters' and the defect category 'a000, Building general'. Below this, a specific defect is selected: '0000.110.00, Complaints maintenance structural'. The defect is described as 'Observed defects' with the identifier 'BA00AE01'. The defect has a severity of '3, Critical' and an intensity of '3, End stage'. The extent is listed as '5, 70% - 100%'. Below this, another defect is listed: 'BA00AG03' with a severity of '1, Minor' and an intensity of '1, First stage'. The extent is listed as '4, 30% - 69%'. At the bottom of the list are two buttons: 'Add' and 'Select activity'. The 'Select activity' button is highlighted with a red box.

A list of standard non-cyclic activities is displayed.

The screenshot shows a 'Add activity' screen. At the top, a navigation bar displays the project name 'Planon Headquarters' and the defect category 'a000, Building general'. Below this, a list of activities is shown. The first two items are listed as standard activities: '- I001, Technical installations general' and '- 5610.325.00, Circulating pump heat distribution D...'. Below these, two specific activities are listed with radio buttons: '5610.325.00H, Recondition circulating pump heat distribution REG DN32' and '5610.325.00V, Replace circulating pump heat distribution REG DN32'.

2. Select a relevant activity.



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

3. Tap Add.

X Survey activity

Standard activity definition
7320.100.00H, Mass catering general repair

Description
Mass catering general repair

Quantity *
1

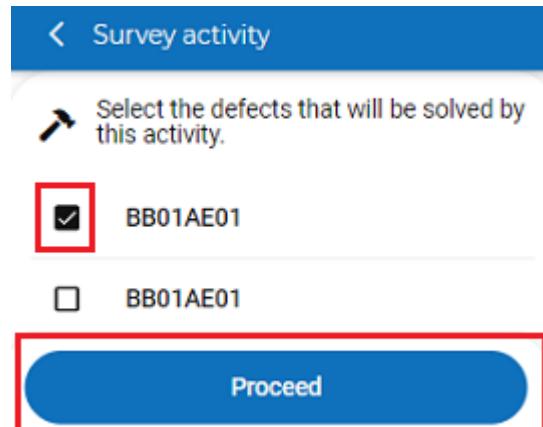
Unit
PST, Spot price

Price per unit (€)
0.00

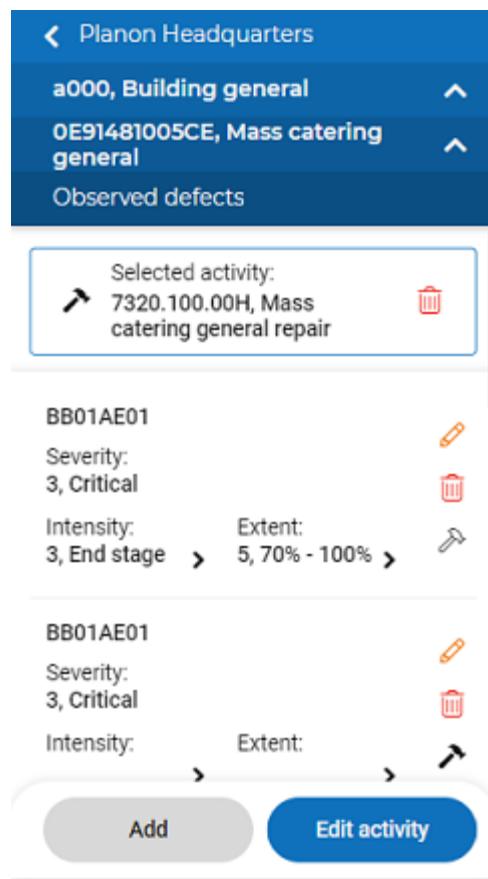
Submit Link defects

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.



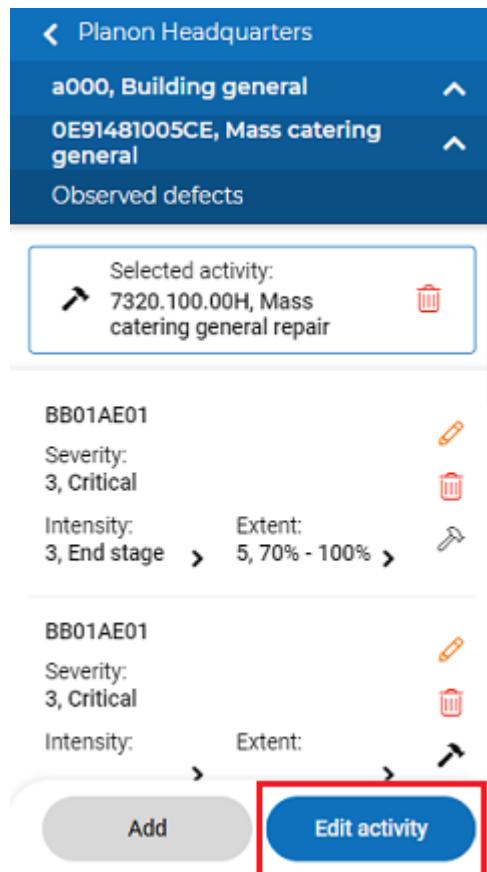
The activity is added.

Editing an activity

On the Mobile Condition Assessor, 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.

X 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 :

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 includes several generic features.

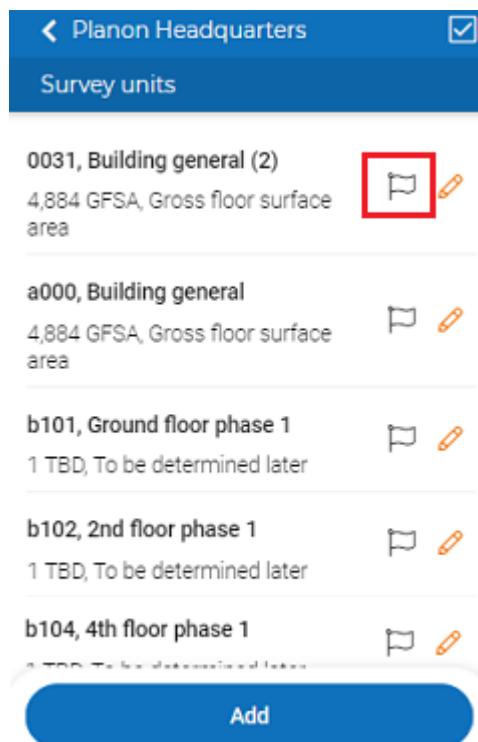
The generic features of the Mobile Condition Assessor include: **Flag**, **Multi-select**, **Copy** and **Delete**.

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** icon. To configure the flag icon in Mobile Condition Assessor , 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



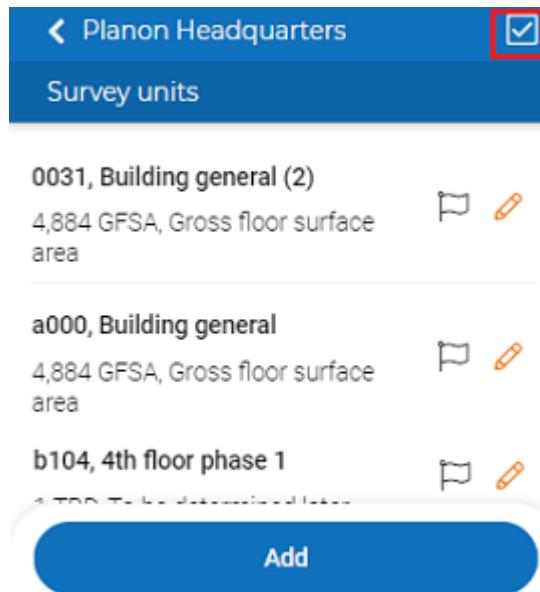
The screenshot shows a mobile application interface for survey units. At the top, there is a header with a back arrow, the text 'Planon Headquarters', and a checkmark icon. Below the header, the title 'Survey units' is displayed. The main content area lists survey units with their details and status indicators. Each item has a blue 'Edit' icon to its right. The first item, '0031, Building general (2)', has a 'Flag' icon with a red border, indicating it is not surveyed. The other items listed are 'a000, Building general', 'b101, Ground floor phase 1', 'b102, 2nd floor phase 1', and 'b104, 4th floor phase 1', all of which have standard blue 'Flag' icons.

Survey unit	Status
0031, Building general (2) 4,884 GFSA, Gross floor surface area	Not Surveyed
a000, Building general 4,884 GFSA, Gross floor surface area	Surveyed
b101, Ground floor phase 1 1 TBD, To be determined later	Unable to survey
b102, 2nd floor phase 1 1 TBD, To be determined later	Others
b104, 4th floor phase 1 1 TBD, To be determined later	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.



The screenshot shows a mobile application interface for 'Planon Headquarters'. At the top, there is a blue header bar with a back arrow and the text 'Planon Headquarters'. To the right of the header is a white checkbox with a red border, which is checked. Below the header is a blue navigation bar with the text 'Survey units'. The main content area displays a list of survey units. Each unit has a blue 'Flag' icon and an orange 'Edit' icon to its right. The list includes:

- 0031, Building general (2)
4,884 GFSA, Gross floor surface area
- a000, Building general
4,884 GFSA, Gross floor surface area
- b104, 4th floor phase 1

At the bottom of the list is a blue button with the text 'Add' in white.

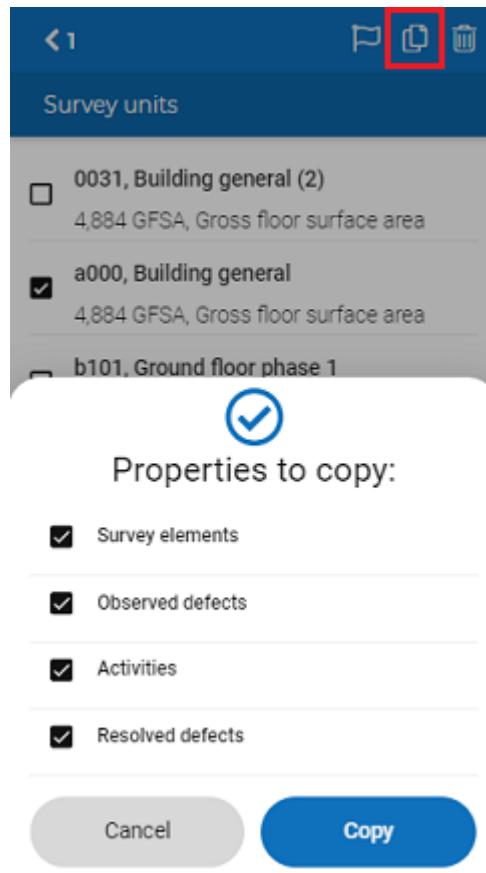
Copy

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 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.

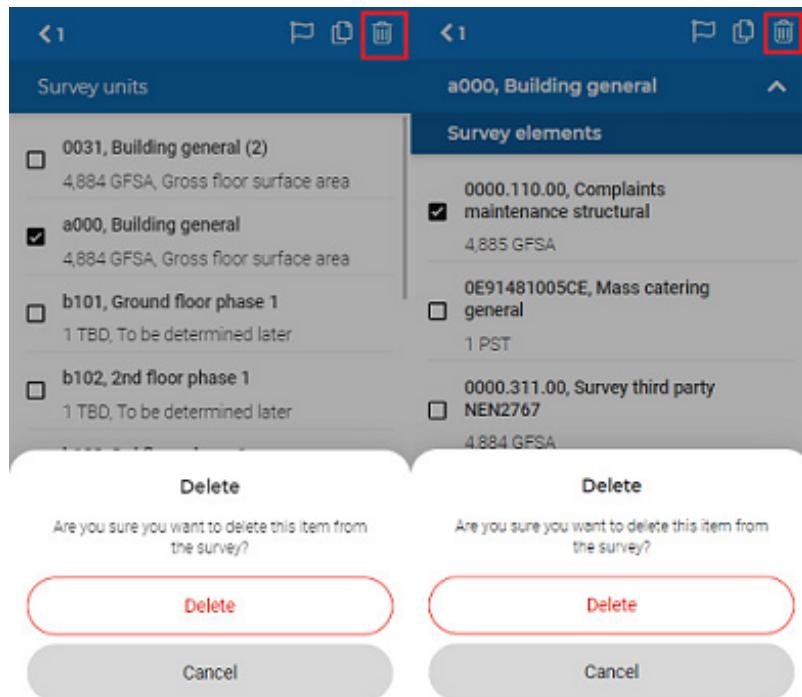
You can copy **solved defects**, if the **Observed defects** and **Activities** are copied / selected.



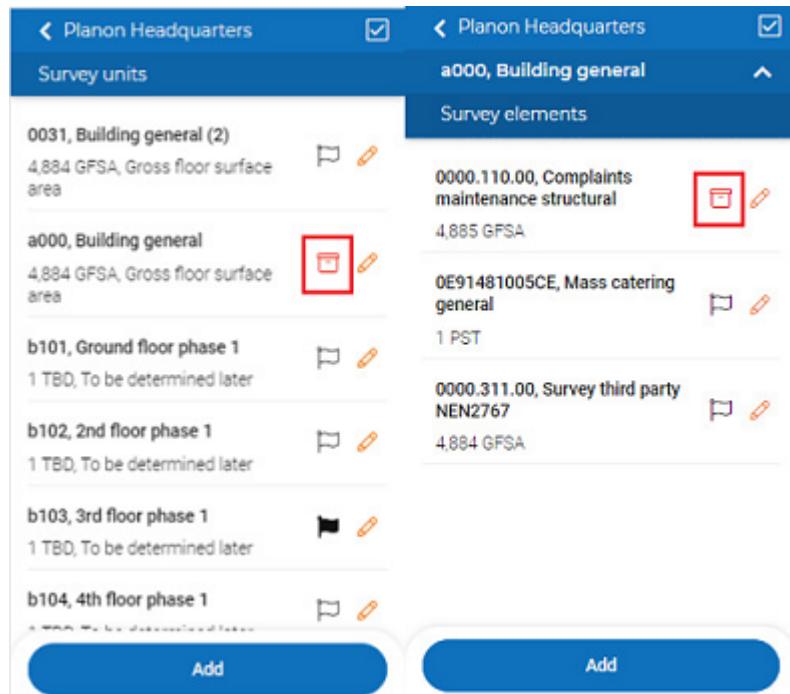
i If the survey unit consists of survey elements linked to an asset from the asset library of the property, then the survey unit can be copied, but not the associated survey elements. If a survey unit consists of survey elements linked to an asset from the asset register of the property, then the survey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

Delete

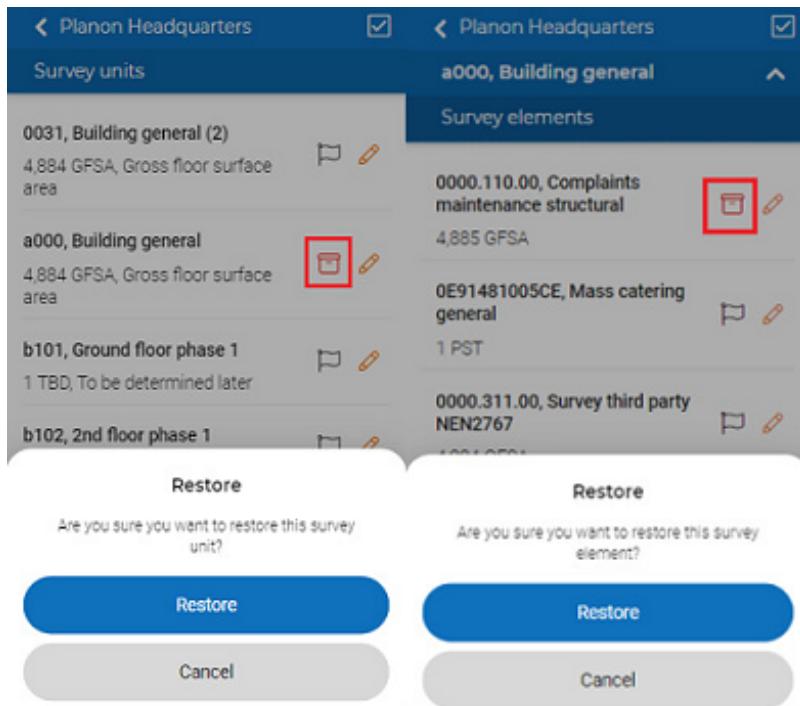
You can delete the selected survey units, survey elements and observed defects using **delete** icon. By tapping the **delete** icon a pop-up appears. Tap **Delete**, to delete or **Cancel** to undo the process of deletion.



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.

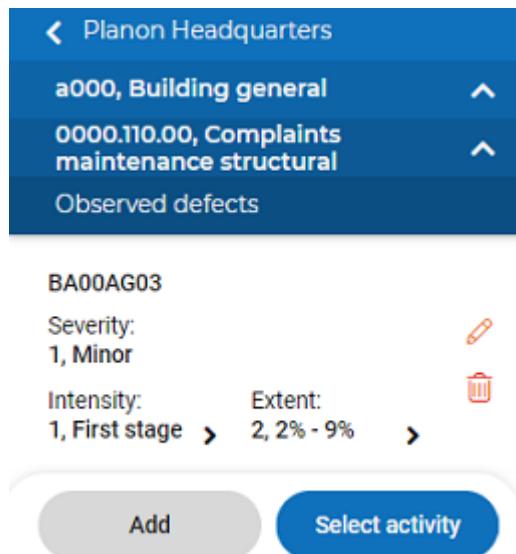


You can restore the survey unit / survey element by tapping a **deleted** icon a pop-up appears. Tap **Restore**, to restore or **Cancel** to undo the process.



The Mobile Condition Assessor 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 , 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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