



# Planon Live - Mobile Observations 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](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 the Mobile Observations app

The **Mobile Observations app** (MOB) can be used within 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 / app modules, such as: Planon Workplace app , the Mobile Condition Assessor app , Assets app, Mobile Assessment Survey app and Mobile Observations app .

The Mobile Observations app connects to the Assessments and observations TSI in Planon ProCenter . Using the Mobile Observations app , you, as field engineer or asset manager, can view existing observations and add observations on assets. In addition, you can add scores for various topics and create follow-up actions to resolve the observations reported.

On the **Start page**, you can select a relevant **category** to view existing observations for a selected asset and add new observations to the asset.

# Features of the Mobile Observations app

The following are the generic features of the Mobile Observations app

- **Search bar** to find assets, standard observations and topic scores.
- **Add button** to add observations and asset scores.
- **Edit button** to update information.
- **Delete button** to delete observations and asset scores.
- **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:
  - **Asset summary** - details about the property and space where the asset is located.
  - **Communication logs** - comments / documents / images that are communicated between you and the back-office.
  - **Follow-up action details** - up-to-date information about the follow-up action.

The main features of the Mobile Observations app are

- Viewing existing observations of an asset.
- Adding a new observation to an asset.
- Scoring an observation on different topics.
- Suggesting follow-up actions to resolve an observation.
- Viewing asset scores on different topics.
- Scoring an asset on different topics.



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

# Working with the Planon Live - Mobile Observations app

This section describes the various functions available for the Planon Live Mobile Observations app .

## Viewing existing observations and asset scores on the Asset

In the Mobile Observations app , you can view observations and assets scores that already exist on an asset.

You can also register new observations and asset scores. In the Mobile Observations app , there are two methods to register observations.

- [Adding an observation via the Asset category](#)
- [Adding a new observation directly from the start page](#)

To add asset scores, see .

### Procedure

1. On the **Start page**, tap the **Asset category**.  
**The Assets page is displayed.**
2. Select an asset from the list or type (part of) the code / name of an asset. You can also scan the QR code of an asset by using the QR code scanner in the **Search** field.  
**The Asset summary page is displayed.**
3. Select the **Asset observations** section.  
**If available, you can view the existing observations of the asset.**
4. Or...Select the **Asset scores** section.  
**If available, you can view the existing asset scores of the asset.**

## Adding an observation via the Asset category

In the Mobile Observations app , you can add a new observation to an asset via the **Asset block**.

### Procedure

1. On the **Start page**, tap the **Asset category**.

**The Assets page is displayed.**

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

**The Asset summary page is displayed.**

3. In the **Asset observations** section, tap the **Add observation** button.

**If standard observations are available in the Assessments and observations TSI, the Standard observations page is displayed listing all the available standard observations. You can add an observation based on a standard observation or continue without a standard observation by selecting the Add observation button at the bottom of the page.**



If the field **Only use standard observations?** is set to **Yes** on the **Mobile Observations** web definition's **Observations** tab, you can only add an observation based on standard observation.

**The Add asset observation page is displayed.**

4. Select date and time for the observation in the **Select date & time** field.
5. Enter a description of the observation in the **Description** field.
6. Add comments and recommendations in the **Comment** and **Recommendation** fields respectively, if required.
7. Select **Add**.

**It is confirmed that the observation is added successfully.**

## Adding a new observation directly from the start page

In the Mobile Observations app , you can add a new observation to an asset.

### Procedure

1. On the **Start page**, tap the **New observation** button.

**The Assets page is displayed.**

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

**If standard observations are available in the Assessments and observations TSI, the Standard observations page is displayed listing all the available standard observations. You can add an observation based on a standard observation or continue without a standard observation by selecting the Add observation button at the bottom of the page.**





If the field **Only use standard observations?** is set to **Yes** on the **Mobile Observations** web definition's **Observations** tab, you can only add an observation based on standard observation.

**The Add asset observation page is displayed.**

3. Select a date and time for the observation in the **Select date & time** field.
4. Enter a description of the observation in the **Description** field.
5. Add comments and recommendations in the **Comment** and **Recommendation** fields respectively, if required.
6. Select **Add**.

**It is confirmed that the observation is added successfully.**



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

## Editing an observation

In the Mobile Observations app , you can edit observations on assets.

### Procedure

1. On the **Start page**, tap the **Asset** block.  
**The Asset page is displayed.**
2. On the **Asset** page, select the asset you want to edit.  
**The Asset summary page is displayed.**
3. From the **Observations** section, select the observation you want to edit.  
**The Observation details page is displayed.**
4. Tap the **Edit** button (pencil icon) at the top of the page.  
**The Edit observation page is displayed.**
5. Make the required edits.



If an observation is resolved, you can end the observation by filling in the end date-time field.

6. Select **Update**.  
**It is confirmed that the update was successful.**

# Adding communication logs to an observation

This section describes how to add communication logs to an observation in the Mobile Observations app .

## Adding a comment to an observation

You can upload your own comments to an observation. This block can be used for the internal communication between you and your co-workers.

### Procedure

1. On the Observation details page, select the Comments block.  
**The Communication logs - Asset observations page 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 to an observation

You can upload documents related to the observation from a folder on your device.



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

### Procedure

1. On the Observation details page, select the Documents block.  
**The Communication logs - Asset observations 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 to the observation. The back-office can access the new document via the communication logs.**

## Adding / uploading an image to an observation

You can add images to an observation. 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 Observation details form, select the Images block.  
**The Communication logs - Asset observations 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.



The supported file types are: .jpeg,.jpg

5. Select Add.  
**The image is added to the observation. The back-office will receive a communication log with the new image.**

## Adding a score to an observation

In the Mobile Observations app , you can add a score to an observation.


### Procedure


1. On the **Asset summary** form, select the observation you want to add a score.  
**The Observation details page is displayed.**
2. On the **Observation details** form, click the **Score** tap.
3. Tap the **Add score** button.  
**The Topic page is displayed.**
4. Select the topic from the list or type (part of) the code / name of the topic in the **Search** field.



There are various types of scoring methods for topics you can add: **Basic scoring**, **Topic matrix** and **Technical condition scoring**. Based on your selection, a relevant scoring page is displayed.

5. On the **Add [...] topic score** page, select date and time in the **Date & time of score** field.
6. Enter the relevant data.

Field	Description
<b>Basic Scoring</b>	
<b>Score</b>	Manually enter the score for the observation in this field.
<b>Topic level</b>	Tap in this field to select the topic level.
<b>Matrix Scoring</b>	
<b>Topic likelihood</b>	Tap in this field to select the topic likelihood.
<b>Topic severity</b>	Tap in this field to select the topic severity.
<b>Technical Scoring</b>	
<b>Intensity</b>	<p>An indicator that marks the phase in which the observed issue occurs.</p> <p>Tap in this field to select the relevant intensity for the observation. The values range from 1 to 3:</p> <ul style="list-style-type: none"> <li>• 1 - First stage</li> <li>• 2 - Advanced stage</li> <li>• 3 - End stage</li> </ul>
<b>Extent</b>	<p>Extent is the proportion in which an observed issue is present in relation to the total surveyed construction or installation.</p> <p>Tap in this field to select the relevant extent for the observation. The values range from 1 to 5:</p> <ul style="list-style-type: none"> <li>• 1 - 1%</li> <li>• 2 - 2% to 9%</li> <li>• 3 - 10% to 29%</li> <li>• 4 - 30% to 69%</li> <li>• 5 - 70% to 100%</li> </ul>
<p> If you fill the <b>Extent</b> range field the system will automatically fill the <b>Extent percentage</b> field with average of the range after saving the score.</p>	
<b>Extent percentage</b>	Manually enter the extent percentage for the observation in this field.

Field	Description
	<div style="border: 1px solid #0070C0; padding: 5px;">  If you fill the <b>Extent percentage</b> field the system will automatically determine the <b>Extend</b> range field after saving the score. </div>


7. Select **Add**.

**It is confirmed that the topic score is added successfully.**

## Editing a score added to an observation

In the Mobile Observations app , you can edit a score added to an observation.

### Procedure


1. On the **Asset observation details** page, in the **Score** section, select a score you want to edit.
2. Select  edit icon.  
**A Edit [...] score page is displayed.**
3. Edit the relevant data.
4. Select **Update**.

**It is confirmed that the information is updated successfully.**

## Deleting a score added to an observation

In the Mobile Observations app , you can delete a score added to an observation.

### Procedure

1. On the **Asset observation details** page, in the **Score** section, click  delete icon on the score you want to delete.
2. Tap **Yes**.

**It is confirmed that the score is deleted successfully.**

## Adding a follow-up action to an observation

For an observation that is made, it is likely that you want to suggest one or more follow-up actions to resolve the observation.

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 Observations app .

You can add the following types of follow-up actions:

- **General follow-up action:** This action type can be used for simple tasks that do not require a formal Planon processes, for example: to update procedure and guideline documents;
- **Order follow-up action:** to create an order to investigate / solve a problem immediately;
- **Activity follow-up action:** to create an activity definition in your maintenance plan;
- **Hazard follow-up action:** to register a hazard in the Hazard registry to inform field engineers.

## Procedure

1. On the **Asset summary** page, select the observation to which you want to add a follow-up action.

**The Observation details page is displayed.**

2. On the **Observation details** page, select the **Follow-up action** tab.
3. Tap the **Add follow-up action** button.
4. Select the relevant follow-up action type from the list.

**Based on your selection, relevant follow-up action page is displayed.**

5. On the [...] **follow-up action** page, enter a description of the follow-up action in the **Description** field.
6. Select a date and time in the **Due date-time** field.
7. **Optional:** enter the expected costs required for the follow-up action in the **Expected costs** field.
8. Add a comment in the **Comment** field.
9. Enter other relevant data.

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Field	Description
<b>Order follow-up action</b>	
<b>Standard order</b>	Select a relevant standard order. An order will be created based on this standard order.

Field	Description
<b>Activity follow-up action</b>	
<b>Standard activity definition</b>	Select a relevant standard activity definition. An activity definition will be created based on this standard activity definition.
<b>Hazard follow-up action</b>	
<b>Hazard type</b>	Select a relevant hazard type. A hazard will be created for this hazard type.

10. Select **Add**.

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

## Editing a follow-up action of an observation

In the Mobile Observations app , you can edit a follow-up action that is added to an observation. To enable the action to edit follow-up actions, see [Planon Live - Mobile observations app configuration](#).

### 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.**

## Adding a specification to a follow-up action

In the Mobile Observations app , 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**.



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 **Mobile observations** web definition's **Observations** 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 added to a follow-up action

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

## Procedure

1. On the **Follow-up action details** page, in the **Specifications** section, click  icon on the specification you want to edit.
2. From the **Available options** pop-up, select **Edit specification**.
3. Edit the relevant data.
4. Select **Update**.

**It is confirmed that the information is updated successfully.**

## Editing a specification added to a follow-up action on the specification details page

In the Mobile Observations app , you can edit a specification added to a follow-up action on the specification details page.

## Procedure

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

**A Specification details page is displayed.**

2. Select  edit icon.

**A Edit specification page is displayed.**

3. Edit the relevant data.
4. Select **Update**.



It is confirmed that the information is updated successfully.

## Deleting a specification added to a follow-up action

In the Mobile Observations app , 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, click **☰** icon on the specification you want to delete.
2. From the **Available options** pop-up, select **Delete specification**.
3. Tap **Yes**.

It is confirmed that the specification is deleted successfully.

## Finalizing a follow-up action of an observation

In the Mobile Observations app , you can finalize a follow-up action that was added to an observation after adding all the action specifications. To enable the action to finalize follow-up actions, see [Planon Live - Mobile observations app configuration](#).

### Procedure

1. On the **Asset observation details** page, select the **Follow-up action** tab.
2. Select the follow-up action you want to finalize.  
**The Follow-up action details page is displayed.**
3. Tap the **Finalize** button at the bottom of the page.

You now get a confirmation that the follow-up action is finalized.



If the 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.

## Adding a score for a topic on the asset

In the Mobile Observations app , you can add a score for a topic directly on the asset.

### Procedure

1. On the **Start page**, tap the **Asset block**.

**The Assets page is displayed.**

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

**The Asset summary page is displayed.**

3. On the **Asset summary** page, select the **Asset scores** tab.
4. Tap the **Add asset score** button.
5. Select the **Topic** from the list displayed.

**For more information on Topics, see [Topics](#).**

6. Select a date and time for the score in the **Select date & time** field.
7. Either fill in the **Score** field or the **Topic level** in the **Topic level** field.



After saving the asset topic score the system will automatically determine the topic level based on the score value and the defined ranges on the topic.

**For more information on Topic levels, see [Topic levels](#).**

8. Add comments in the **Comment** field.
9. Select **Add**.

**It is confirmed that the score is added successfully.**

## Editing a score added to an asset

In the Mobile Observations app , you can edit a asset's score.

### Procedure

1. On the **Asset summary** page, select the **Asset scores** tab.
2. Select the score you want to edit.

**The Asset score details page is displayed.**

3. Tap the **Edit** button (pencil icon) at the top of the page.
4. Edit the relevant data on the page.
5. Select **Update**.

**It is confirmed that the information is updated successfully.**

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