Planon app - Mobile Observations

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.

Table of Contents

About Mobile Observations

The **Mobile Observations** (MOB) 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 solutions and modules, such as: Workplace solution , the Assets module, Mobile Condition Assessor , Mobile Assessment Surveys and Mobile Observations .

The Mobile Observations connects to the Assessments and observations TSI in Planon ProCenter . Using the Mobile Observations , you, as field engineer or asset manager, can view existing observations and add new observations on a property / space / assets. Additionally, you can add scores for various topics and create follow-up actions to resolve the reported observations. Alongside observations, you can also view or add assessments.

On the **Start page**, you can select a relevant **category (Assets / Properties/ Spaces)** to view existing observations and add new observations.

Features of the Mobile Observations module

The following generic features are available in the Mobile Observations

- **Search bar** to find assets / properties / spaces, standard observations and topic scores.

- **Add button** to add observations and scores.

- **Edit button** to update information.

- **Delete button** to delete observations and scores.

- **Scan QR code** button, to find a property / space / 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:

  ◦ **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 are

- Viewing existing observations.

- Adding new observations.

- Viewing existing assessments.

- Adding new assessments.

- Suggesting follow-up actions to resolve an observation.

- Viewing topic scores of a property / space / asset.

- Scoring a property / space / asset on different topics.

> **i** 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 - Mobile Observations

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

Viewing existing observations, assessments and asset scores on a property / space / asset

In the Mobile Observations , you can view observations, assessments and asset scores that already exist on a property / space / asset. You can also register new observations, assessments and asset scores.

To add new observations, see Adding an observation to a property / space / asset.

To add assessments, see Adding an assessment to a Property / Space / Asset.

To add asset scores, see Adding a score for a topic on a Property / Space / Asset.

Procedure

1. On the **Observations overview** page, select a relevant category (Properties / Spaces / Assets).

   The List page is displayed.

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

   The Summary page is displayed.

3. Select the **Observations** section.

   If available, you can view the existing observations of a property / space / asset.

4. Or...select the **Assessments** section.

   If available, you can view the existing assessments of a property / space / asset.

5. Or...select the **Scores** section.

   If available, you can view the existing asset scores of a property / space / asset.

Adding an observation to a property / space / asset

In the Mobile Observations , you can add a new observation to a **Property** / **Space** / **Asset**.

Procedure

1. On the **Observations overview**, select a relevant category **(Assets / Properties / Spaces)**.

   The List page is displayed.

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

   The Summary page is displayed.

3. In the **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 available standard observations. You can add an observation based on a standard observation or continue without a standard observation by selecting the Add new observation button at the bottom of the page.

   > ℹ️
   > - If the field **Only use standard observations?** is set to **Yes** on the **Mobile Observations** sub-web definition's **Observations** tab, you can only add an observation based on standard observation.
   > - Before adding a new observation, check the existing observations for the property / space / asset to avoid duplicates and ensure better context for new entries. For more information, see Browsing existing observation(s).

   The Add 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.

Editing an observation

In the Mobile Observations , you can edit observations on a property / space / asset.

1. On the **Observations overview** page, select a relevant category **(Assets / Properties / Spaces)**.

   The List page is displayed.

2. On the **List** page, select a property / space / asset whose observations you want to edit.

   The 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.

> ℹ️ 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 .

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.

1. On the Observation details page, select the Comments block.

   The Communication logs - 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.

> ℹ 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 - 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 - 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.

> ℹ 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 , you can add a score to an observation.

Procedure

1. On the **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 Topics 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 [...] score** page, select date and time in the **Date & time of score** field.

6. 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.
	> 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.
	> The likelihood is shown based on the matrix of the selected topic.
Topic severity	Tap in this field to select the topic severity.
	> The severity is shown based on the matrix of the selected topic.

Field	Description
Technical Scoring	
Intensity	An indicator that marks the phase in which the observed issue occurs.
	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
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 valuesrange from 1 to 5:
	• 1 - 1%
	• 2 - 2% to 9%
	• 3 - 10% to 29%
	• 4 - 30% to 69%
	• 5 - 70% to 100%
	ℹ️ If you fill the **Extent** range field the system will automatically fill the **Extent percentage** field with average of the range after saving the score.
Extent percentage	Manually enter the extent percentage for the observation in this field.
	ℹ️ If you fill the **Extent percentage** field the system will automatically determine the **Extend** range field after saving the score.

7. Select **Add**.

   It is confirmed that the topic score is added successfully.

Editing a score added to an observation

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

Procedure

1. On the **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 , you can delete a score added to an observation.

Procedure

1.

On the **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.

Linking an existing 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. In the Mobile Observations , you can link an existing follow-up action to an observation.

> ℹ️ Linking an existing follow-up action means that the observation will be resolved by this follow-up action. Once the follow-up action is completed, the observation will be resolved.

To enable the action to link a follow-up action to an observation, see Planon Live - Mobile observations app configuration.

Procedure

1. On the **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.

   The Select follow-up actions page is displayed.

4. Select the follow-up action from the list to which you want to link to an observation.

It is confirmed that the follow-up action is linked 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 .

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 **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 new follow-up** 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.

Field	Description
Order follow-up action	
Standard order	Select a relevant standard order. An order will be created based on this standard order.
Activity follow-up action	
Standard activity definition	Select a relevant standard activity definition. An activity definition will be created based on this standard activity definition.
Hazard follow-up action	
Hazard type	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 , 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.

Canceling a follow-up action of an observation

In the Mobile Observations , you can cancel a follow-up action that was added to an observation.

Procedure

1. On the **Observation details** page, select the **Follow-up action** tab.
2. Select the follow-up action you want to cancel.

    The Follow-up action details page is displayed.

3. Tap the **Cancel** button at the bottom of the page.

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

Adding a specification to a follow-up action

In the Mobile Observations , 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**.

> ℹ 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 , 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 , 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 , 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 , 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 **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.
>
> - When a follow-up action is finalized, it becomes read-only and it is not possible to add/edit/delete action specifications for this finalized follow-up action.

Adding an assessment to a Property / Space / Asset

In the Mobile Observations , you can add an assessment to a **Property** / **Space** / **Asset**.

Procedure

1. On the **Observations overview** page, select a relevant category **(Assets / Properties / Spaces)**.

   The List page is displayed.

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

   The Summary page is displayed.

3. In the **Assessments** section, tap the **Add assessments** button.

   The Assessment definitions page is displayed.

4. Select an assessment definition from the list or type (part of) the code / name of an assessment definition in the **Search** field.

   The Add assessment page is displayed.

5. Select date and time for the assessment in the **Assessment date & time** field.

6. Enter a description of the assessment in the **Description** field.

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

8. Select **Add**.

> ℹ️ Questionnaires are not yet supported for assessments.

It is confirmed that the assessment is added successfully.

Editing an assessment

In the Mobile Observations , you can edit assessments of a property / space / asset.

Procedure

1. On the **Observations overview** page, select a relevant category **(Assets / Properties / Spaces)**.

   The List page is displayed.

2. On the **List** page, select a property / space / asset whose assessments you want to edit.

   The Summary page is displayed.

3. From the **Assessments** section, select the assessment you want to edit.

   The Assessment summary page is displayed.

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

   The Edit assessment page is displayed.

5. Make the required edits.

6. Select **Update**.

   It is confirmed that the update was successful.

Browsing existing observation(s)

On the **Assessment Summary** page, you can view the observations recorded during that assessment and also browse the existing observations for any asset, space, or property to decide whether you need to add a new observation.

Procedure

1. On the **Assessment summary** page, select the **Observations** tab.

   If available, you can view the existing observation(s) of an assessment.

2. Tap the **Browse observations** button.

   The Existing observations page is displayed.

3. Filter on the property / space / asset to view the existing observations.

4. To add a new observation, tap the **Add observation** button and follow the same procedure from step 4 of Adding an observation to an assessment.

ℹ️ Before adding a new observation, check the existing observations for the property / space / asset to avoid duplicates and ensure better context for new entries.

Adding an observation to an assessment

In the Mobile Observations , you can add an observation to an assessment.

Procedure

1. On the **Summary** page, in the **Assessments** section, select the assessment to which you want to add an observation.

    The Assessment summary page is displayed.

2. On the **Assessment summary** page, select the **Observations** tab.
3. Tap the **Add observation** button.
4. From the **Available options** pop-up, select relevant observation (Asset observation / Property observation / Space observation).
5. Follow the same procedure from step 3 of Adding an observation to a property / space / asset.

Adding a score for a topic on a Property / Space / Asset

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

Procedure

1. On the **Observations overview** page, select a relevant category **(Assets / Properties / Spaces)**.

    The List page is displayed.

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

    The Summary page is displayed.

3. On the **Summary** page, select the **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.

> 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.

For more information on Topic levels, see Topic levels.

> ℹ️ 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.

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

9. Select **Add**.

   It is confirmed that the score is added successfully.

Editing a score added to a Property / Space / Asset

In the Mobile Observations , you can edit a score added to a property / space / asset.

Procedure

1. On the **Summary** page, select the **Scores** tab.

2. Select the score you want to edit.

   The 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.

Index