



Planon Live - Mobile Observations app

Planon Software Suite

Version: L107

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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 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
Basic Scoring	
Score	Manually enter the score for the observation in this field.
Topic level	Tap in this field to select the topic level.
Matrix Scoring	
Topic likelihood	Tap in this field to select the topic likelihood.
Topic severity	Tap in this field to select the topic severity.
Technical Scoring	
Intensity	<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"> • 1 - First stage • 2 - Advanced stage • 3 - End stage
Extent	<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"> • 1 - 1% • 2 - 2% to 9% • 3 - 10% to 29% • 4 - 30% to 69% • 5 - 70% to 100%
<p> 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.</p>	
Extent percentage	Manually enter the extent percentage for the observation in this field.

Field	Description
	<div style="border: 1px solid black; padding: 5px;">  If you fill the Extent percentage field the system will automatically determine the Extend 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.

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 app , you can link an existing follow-up action to an observation.



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 **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.

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 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.

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 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).
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 app , you can cancel a follow-up action that was added to an observation.

Procedure

1. On the **Asset 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 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.

 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 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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