Planon app - PMFS solution

Planon Software Suite

Version: L126

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 using the PMFS solution - Work assignments

With the **Work assignments** module in the **Planon app**, field engineers / technicians can find the work assignments that have been assigned to them or to their team. The app's technology and features ensure that the back-office gets updated correctly, even if they are working at remote locations.

Like most **Planon app** modules, **Work assignments** can be customized. This means that names, labels, etc. used in this user documentation may differ from what you see on your app.

Planon app and the Work assignments module

With the correct license, the **Work assignments** module is available for the **Planon app**, which is the 'shell' application that you can download from your app store. You can use **Work assignments** alongside various other *licensed* **Planon app** modules that are available.

Features of Work assignments:

- fast and intuitive maintenance job handling,
- health and safety procedures to ensure compliance,
- registration of time and materials,
- taking photos
- adding comments
- uploading of document files and images
- updating the work assignment's status
- viewing linked work assignments
- applying a temporary fix
- completing maintenance activities and filling out checklists,
- customer sign-off,
- offline capability.

Work assignments is designed to work as an *offline solution*. Synchronization between mobile device and back-office takes place via virtual 'envelopes' and messages which will carry all registered PMFS actions from mobile device to back-office. If you are online, this happens real-time. If you are offline, the messages are retained on your device until you are online again, and are then sent to the back-office.

The **PMFS solution** license will give access to the following modules:

- **Work assignments**
- **Assets**
- **Properties**
- **Orders**
- **Materials**
- **External links**

For more information on adding and configuring licensed app modules in the Planon app, see About Planon app - mobile configuration.

Downloading the app and logging in

Start by downloading the **Planon app** from the relevant App store (iOS) or Play store (Android).

The **Planon app** is the application in which the various PMFS solution modules are running.

You can also scan this QR code to open the store and download the Planon app:

> If you are migrating from the Planon Live app to the Planon app, the app functionality will only work if the Planon system administrator has completed the migration from the old app to the new.

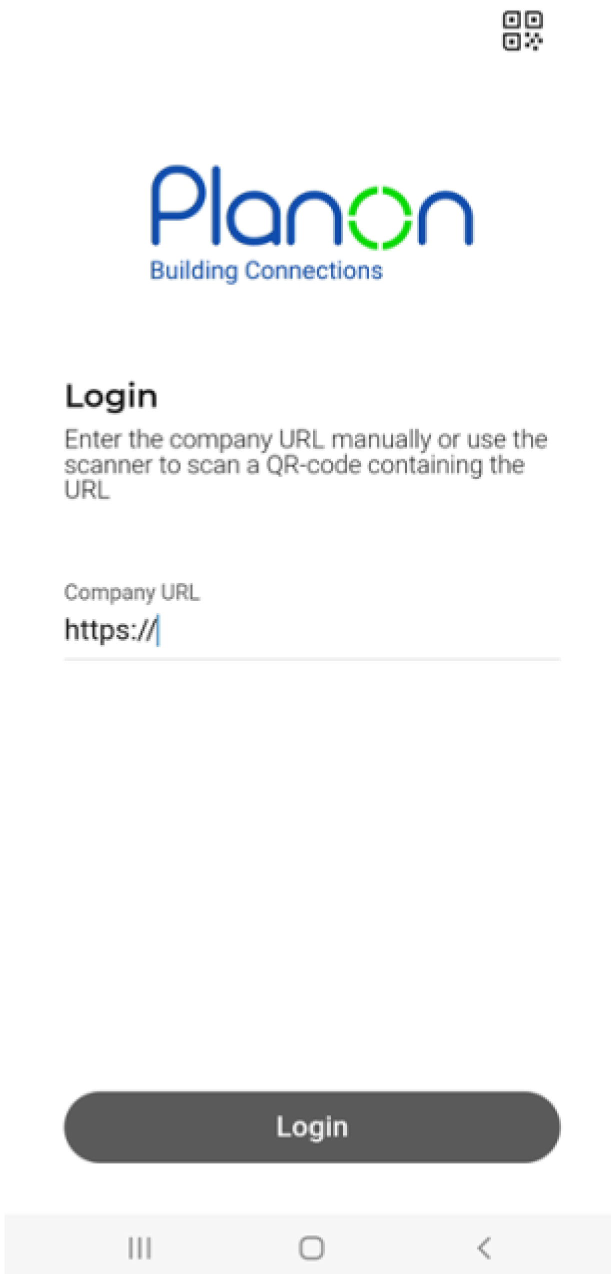
… or scan this OR code to download the **Planon** app:

Logging in

1. Start **Planon** on your mobile device.
2. Type the URL to your Planon environment ...

or

3. … open the QR code scanner at the top right of the login screen and scan a QR code that represents the environment URL.



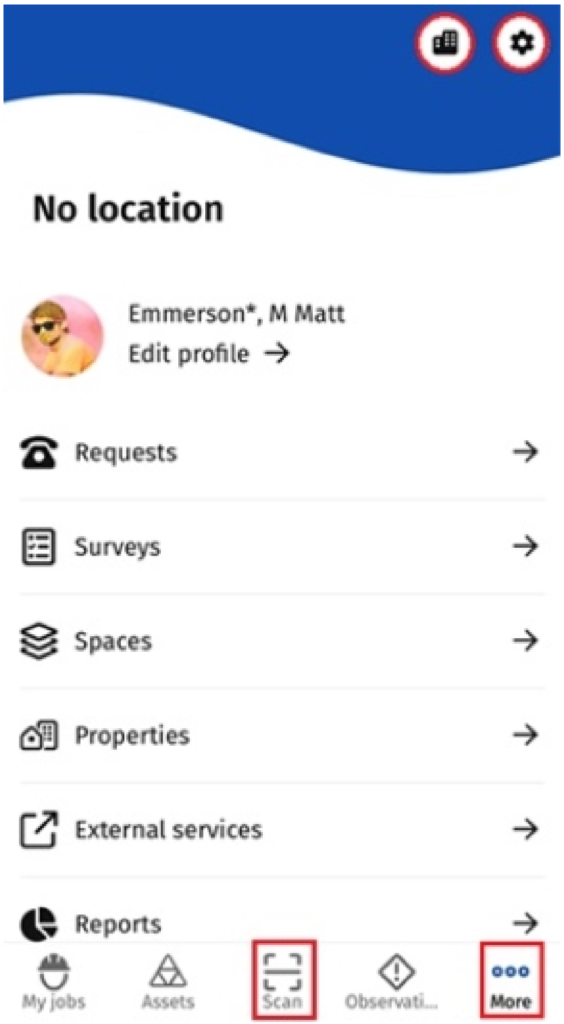
Application administrators can use a QR code generator to convert the environment URL into a QR code and provide it to app users.

4. Enter your Planon credentials (user name and password).

   The app opens and is ready for use. The PMFS solution content available to you depends on the specific configuration that has been applied to the app.

Generic features and settings

In addition to the functional modules, the Planon app includes several generic features: **Edit profile**, **Scan** and **Settings**.



Edit profile

If you select the **More** (ᵒᵒᵒ icon), you can tap the **Edit profile** option, to edit your personal details, in as far as they are editable.

Scan (QR code / NFC tag)

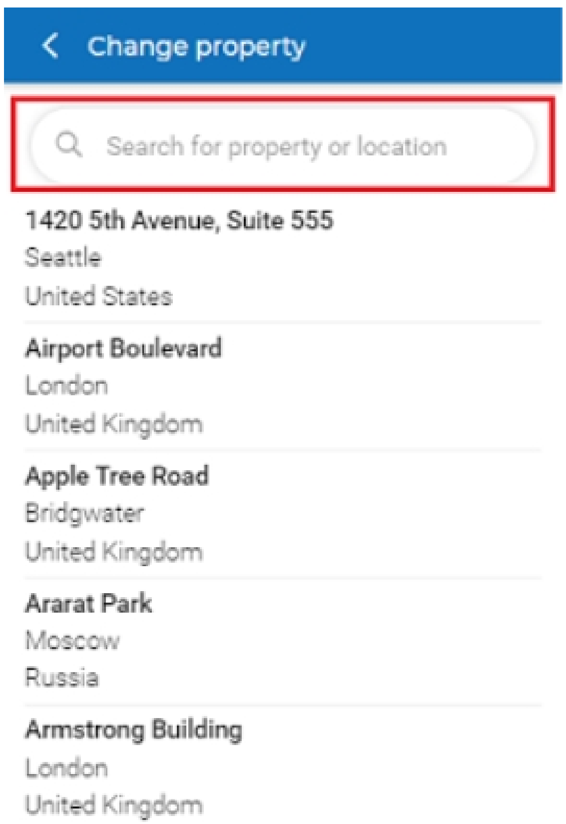
If you scan the **QR code** or **NFC tag** of a space, then one of these modules is opened:

- If the scanned space is a reservation unit, the **Reservations** module is opened. To create reservation, refer to .
- If the scanned space is not a reservation unit, the **Spaces** module is opened. see also .

When you scan the **QR code** of a meeting room (space unit) or desk (workspace) while you have an active reservation for it, the **Reservation details page** is automatically opened, to make it easier to add a request or adjust the reservation.

Change property

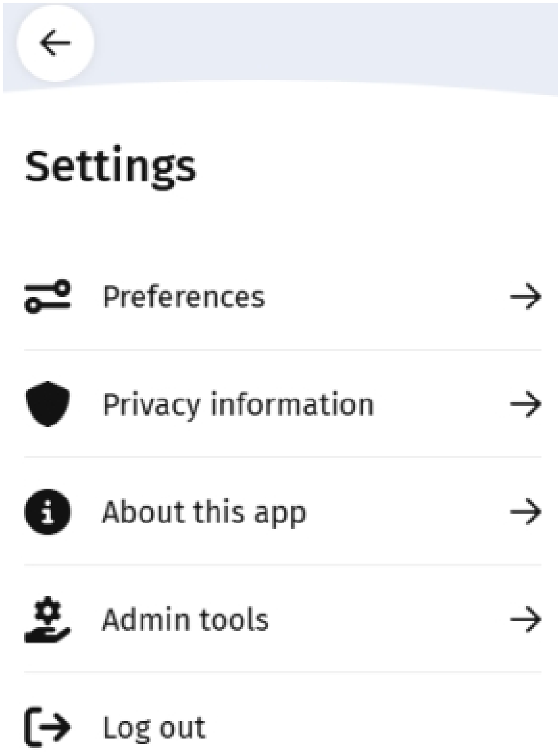
To change the property, tap the **Property** icon at the top-right corner of the screen.



A list of properties is displayed, from which you can select the property. The search field allows you to search for the properties by entering a name of the property.

Settings

To change the settings of the Planon app, tap the **Settings** icon at the top-right corner of the screen.



The options listed in the settings menu are:

- **Preferences**:
  - At **Display style**, select either **Tablet** or **Mobile**, to optimize the view for your type of mobile device.
  - At **Dark mode**, switch the **Dark** theme on or off.

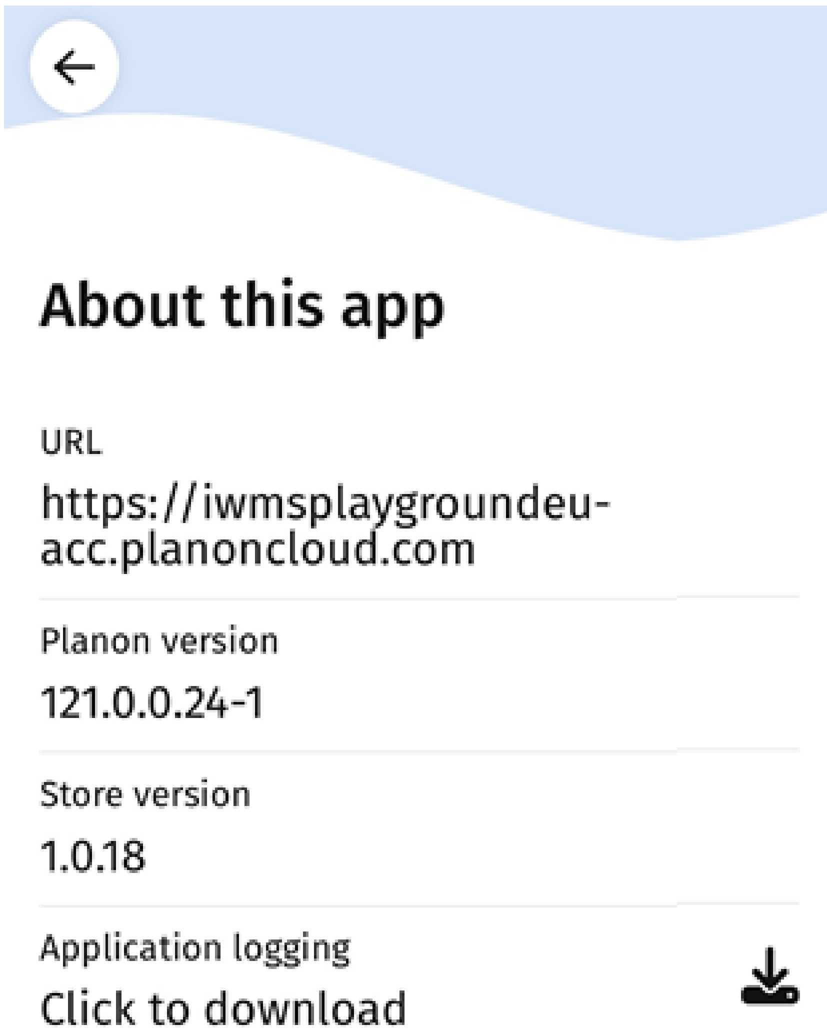
When the device has no internet connection, the **Preferences** menu is visible but not accessible.

- **Privacy information**:
  - **Privacy statement**: If you want to view the applicable privacy statement, tap the **Privacy statement**, to open the link in your default browser. This is only possible, if your application manager has added the link in the **System settings** TSI > **General settings**. If there is no privacy statement link added, the message **No privacy statement available** is displayed in the privacy menu. See General settings fields.
  - **Privacy level**: Select your preferred privacy setting to control the visibility of your office attendance and workspace location:
    - **Show office attendance and workspace location**: Your attendance block will be visible. Colleagues can click on it to view your workspace location details.
    - **Show office attendance only**: Your attendance block will be visible, but colleagues cannot click on it to access your workspace location details.

- **Hide office attendance and workspace location**: Your attendance block will be completely hidden from colleagues.

> When the device has no internet connection, **Privacy information** is visible but not accessible.

- **About this app**: Displays technical information related to the connected environment.



  - **URL**: Displays the **URL** used for logging in.
  - **Planon version**: Displays the related **Planon version**.
  - **App version**: Displays the installed version of the app.
  - **Application logging**: Tap **Click to download** to download device application logs.

> Application logs can be downloaded both **Online** and **Offline**.

- **Admin tools**: If you belong to a linked user group with 'admin' rights, tap this option to get access to admin tools within the app. For example, the **Write NFC tags** option. With this option, *Android* phone users can be allowed to scan Planon QR codes and write the content to NFC tags, from within the Planon app. They can write NFC tags for spaces, workspaces and assets. See also: .

For more information about on granting 'admin' rights within the app, see Start page in the *Planon app - Mobile configuration* documentation.

- **Log out**: Tap the **Log out** option if you want to log out. A pop-up appears. You can confirm by tapping **Log out** or you can **Cancel** to return to the app.

When the device has no internet connection, **Log out** is visible but not accessible.

- If the app configuration is updated by an application manager in Planon ProCenter , you must log off and log on again to see these updates in the Planon app.
- Because the modules of the Planon app are configurable, any examples given may deviate from what is displayed on your app. For more information on **App configuration**, see About Planon app - mobile configuration.

Work assignments overview page

Landing page

After you have logged on to the Planon app you can select the **Work assignments** module.

When you open the module, you will be taken to a landing page with an overview of the work currently assigned to you personally or as team member.

Number of items displayed in the list

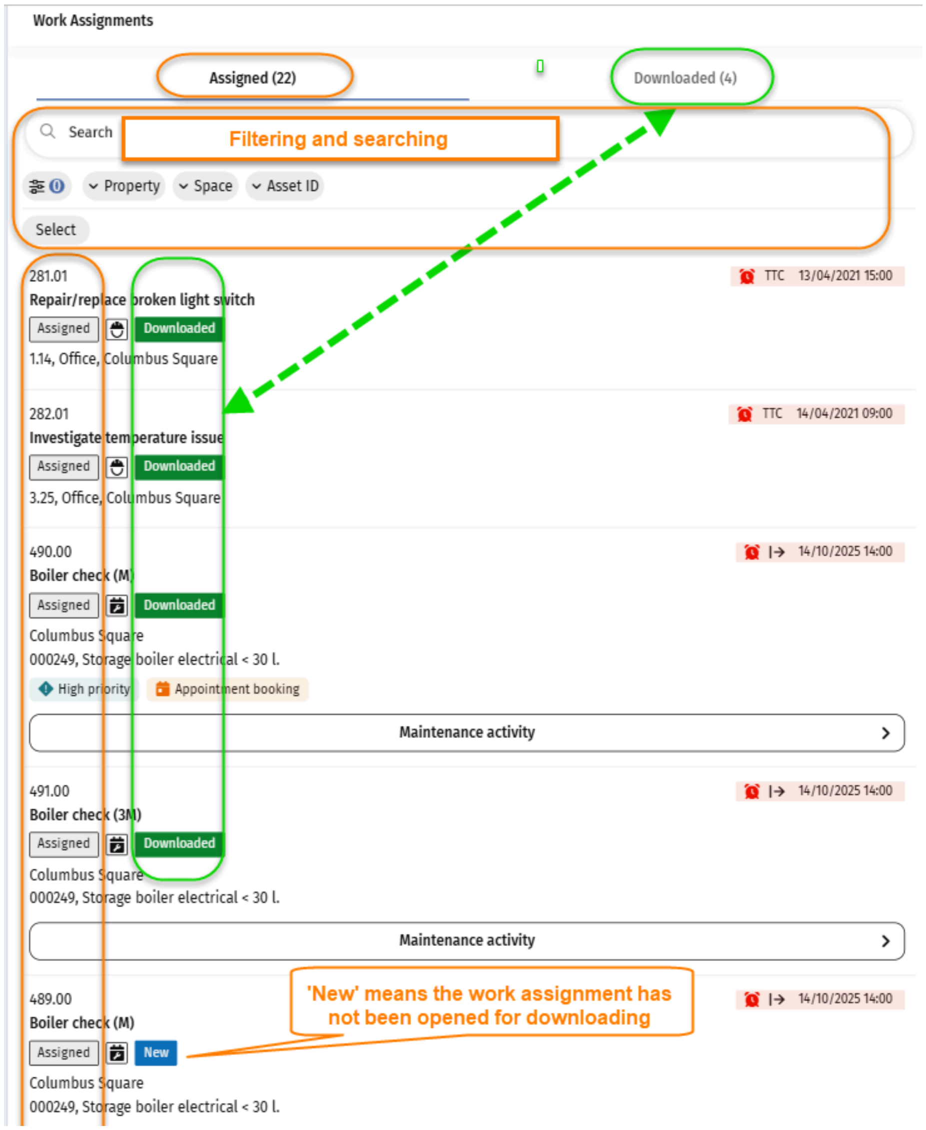
The number of items that are displayed on the **Assigned** tab at any one time is 100. However, if you have been assigned more than 100 tasks, you can also find and display the other tasks by refreshing, searching, or filtering the list.

Number of items you can select for downloading

Using the **Select** button, you can pick up to *10* work assignments at a time for downloading (for offline use). The download will take place in the background. Downloads may pause when interrupted, but will automatically resume once the interruption is resolved. Labels in front of the description indicate the download status. See the note in the **Tabs** section below.

> This functionality is configurable and is only available if your Planon administrator has enabled the **Multi-select envelopes** action on the **Start page (online)**. See Linking user groups and configuring the Start pages (online / offline) for more information.

Tabs



The module's landing page consists of two tabs:

- **Assigned** tab - this view displays all tasks assigned to you personally, or as a team member. The list behaves *dynamically*, which means that the initial list updates during your search, filter, scroll and refresh actions. While you are online you can retrieve and search all tasks assigned to you, both the downloaded work and the new, unopened work assignments. Non-downloaded work assignments are labeled **New**. See Job list - grouping and sorting for more details about the list's sorting criteria.

You cannot work offline on an unopened work assignment. You must open / download it first. Labels in front of the description indicate the download status of a work assignment: **Download pending**, **Downloading**, **Downloaded**. Once it has been opened / downloaded, you can also continue working offline. The work assignment is now displayed on the **Downloaded** tab.

- **Downloaded** tab - this view displays the work assignments that have been downloaded to your device, and have therefore become available offline. They are grouped according to status and - within each group - displayed in a specific order. Everything that is in progress on your device is shown at the top, followed by the accepted and assigned work. See Job list - grouping and sorting for details about the grouping and sorting criteria.

> The type of date-time information that is displayed depends on your configuration. The displayed date-time can be an SLA related date-time of the related order, or the **Planned start date-time** of the work assignment.

Search block, filters and multi-select

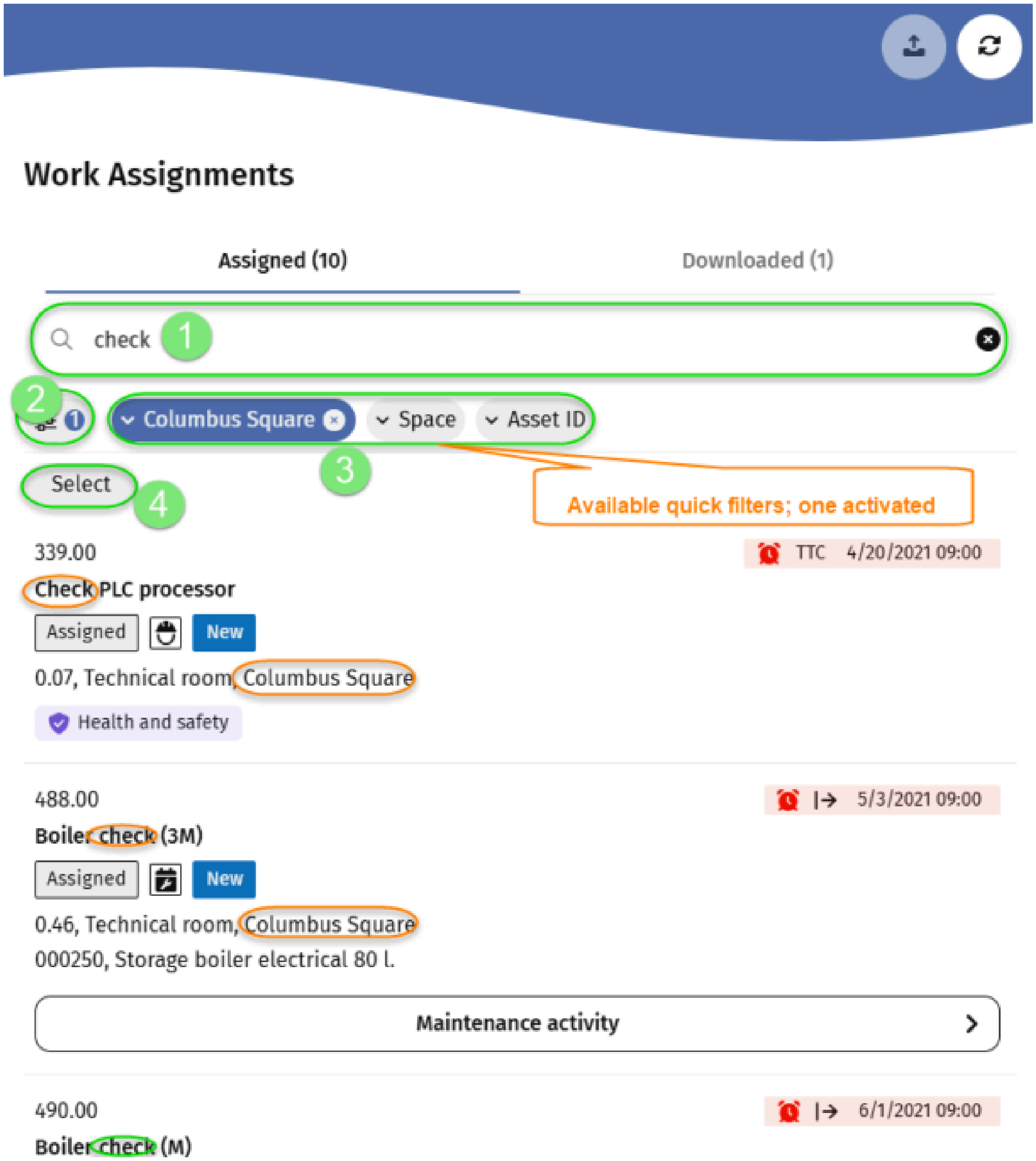
If there are many items in your list, you can use the available **Search** and **Filter** options to find a specific work assignment more quickly.

- Start typing (part of) a search term in the **Search** block, and/or ...
- select a **Filter**, and/or ...
- activate a **Quick filter**.

In the following image, the search is on the term *check* (1), the filter is on *PPM order* (2), selected option not visible here) the quick filter is on *property* = *'Columbus Square'* (3).

> To help you quickly locate and prioritize work assignments, your application manager can configure **Order** fields as filter criteria, such as **Property**, **Space**, **Asset ID**, **Planned end date**, **Service level**, and **Floor**.

You can use the *Select* button (4) to select up to 10 work assignments in one go, for downloading.



Before you accept a work assignment, you can view its details. Select the work assignment to navigate to the Summary page that has more detailed information.

For more information about the icons and labels displayed on this page see Icons and labels.

Job list - grouping and sorting

The app's **Landing** page displays all work assignments that are assigned to you personally or as a team member, distributed over two tabs. The **Assigned** tab is an *online* overview of *all* work that is assigned to you. Unopened assignments are labeled as **New**. While you are online, you can update the list by selecting the **Refresh** button.

Once you tap a work assignment to open it, it is also added to the **Downloaded** tab, making it available for offline access.

The grouping and sorting criteria that are applied to the lists require some explanation.

Sorting on the Assigned tab

On the **Assigned** tab, your work assignments are sorted based on:

- the **date-time** of the work assignment (nearest start date-time or requested completion date-time at the top),

> The type of date-time information that is displayed depends on your configuration. The displayed date-time can be an SLA related date-time of the related order, or the **Planned start date-time** of the work assignment.
>
> For more information about configuring the date-times, see Linking user groups and configuring the Start page.

- whether it is a **high priority** assignment or not,
- **order type** ('reactive' assignments are ranked higher than 'planned' work),
- whether the assignment is a **personal** or a **team** assignment,
- work assignment **code**.

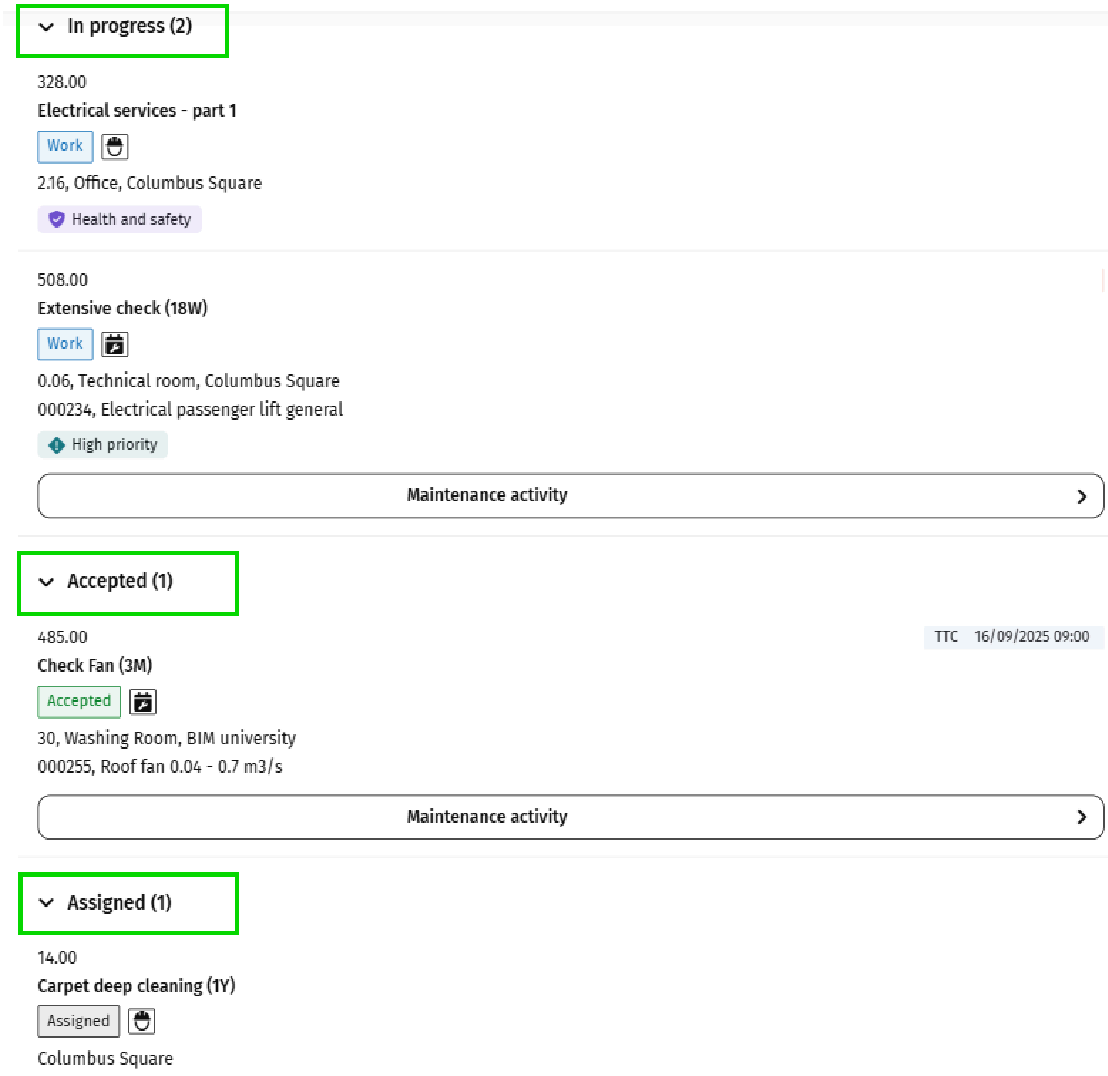
In short: Work assignments that are *high priority*, *reactive* and *personally assigned* to a field engineer will get the highest ranking. Non-reactive team assignments with a normal priority will be ranked lower.

Sorting and grouping on the Downloaded tab

On the **Downloaded** tab, your work assignments are grouped according to their current status.

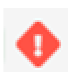
Within each group, work assignments are sorted based on the same criteria as on the **Assigned** tab.

1. At the top of the list you see the work **In progress**. This group includes jobs that you have already started, by selecting either **Travel**, **Work**, **Wait** or **Pause** on your mobile device.
2. The second group includes all the work you have **Accepted**, but not yet started.
3. The third group includes work assignments that you have only downloaded (still in the **Assigned** status).


In progress (2)
328.00
Electrical services - part 1
Work
2.16, Office, Columbus Square
Health and safety
508.00
Extensive check (18W)
Work
0.06, Technical room, Columbus Square
000234, Electrical passenger lift general
High priority
Maintenance activity
Accepted (1)
485.00
TTC 16/09/2025 09:00
Check Fan (3M)
Accepted
30, Washing Room, BIM university
000255, Roof fan 0.04 - 0.7 m3/s
Maintenance activity
Assigned (1)
14.00
Carpet deep cleaning (1Y)
Assigned
Columbus Square

Icons and labels

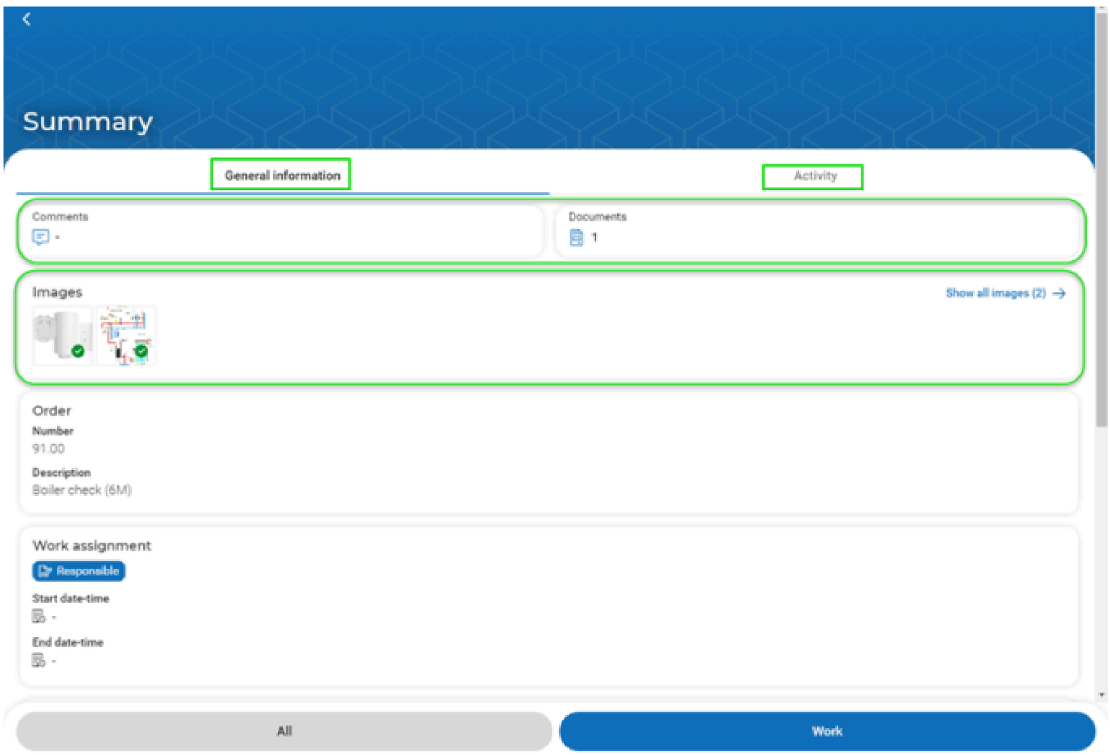
Various icons and labels are displayed on the work assignments that listed on the **Work assignments** overview page. The following table provides information on their meaning:

Icon / label	Description	Additional info
	Key work assignment	If the work assignment that is assigned to a person is marked as 'key work assignment', this assignee is the responsible engineer for signing off the work upon completion.
	High priority	If the back-office marked the work assignment as 'high priority' this icon is shown on the work assignment.
	Appointment booking	If the back-office marked the work assignment as an appointment booking, this icon is included in the work assignment's date-time information.
	Linked to PPM order	This icon indicates that the linked order is a PPM order. You might see a different icon on your app, because application managers can configure this icon on the PPM order in Field definer .
	Linked to work order	This icon indicates that the linked order is a work order. You might see a different icon on your app, because application managers can configure this icon on the work order in Field definer .

Icon / label	Description	Additional info
Assigned Accepted Pause Travel Wait Work Team	These labels represent the work assignment's *status*.	When you select an action for the work assignment, the status label is updated accordingly. The **Team** label is only shown until you, or one of your team members, accepts the work assignment. At that point the work assignment becomes a personal assignment. The work assignment will be removed from the other team members' devices.
Overdue	'Overdue' indicator	This label replaces the displayed date-time information if the work assignment is overdue.
TTR	Time to respond	If SLAs are applicable, the label also indicates which SLA (TTR/ TTA//TTF/TTC) is linked to the displayed (overdue) date-time.
TTA	Time to attend	
TTF	Time to fix	
TTC	Time to complete	

Summary page

If you select a work assignment from the overview, or if you accept a work assignment and start work, you are directed to a **Summary** page with detailed information. The information is grouped in various blocks. By selecting a block, you will navigate to a page with more details. The following example displays the **Summary** page of a PPM work assignment, with information on two tabs, **General information** and **Activity**.



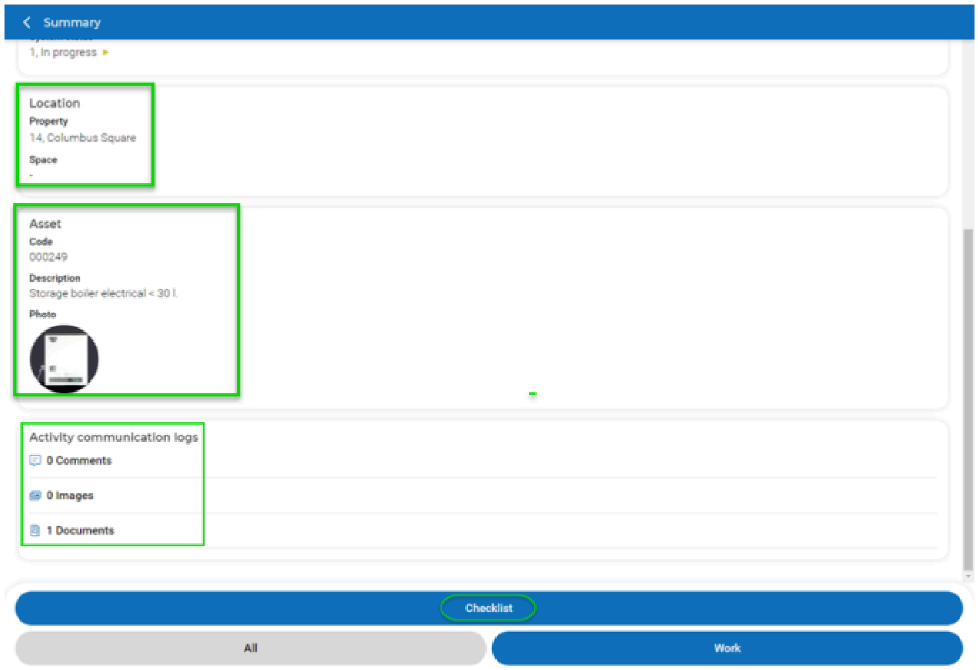
- If the work assignment is part of a 'regular' work order, the work assignment summary includes the following blocks: **Comments**, **Documents**, **Images**, **Order**, **Work assignment**, **Tradesperson's notes**, **Location**, **Assets**, **Meters**, **Observations**, **SLAs**, **Time spent** (**Work**, **Travel** and **Wait** hours), **Materials**, **Questionnaires** and **Related orders**.

> If you have internet connection, you will see thumbnails on the **Images** block, whether an image is downloaded or not. If you select a single, non-downloaded image or a non-downloaded document, the selected item is downloaded (provided there is an internet connection).

- If the work assignment summary is part of a PPM order, the summary layout consists of two tabs:
  - **General information** tab - displaying the work assignment information blocks such as **Order**, **Comments**, **Documents**, **Images**, **Work assignment**, **Health**

&Safety, **Tradesperson's notes**, **Location**, **Time spent** (**Work**, **Travel** and **Wait** hours), **Materials**, **Questionnaires**, **Labor hours**.

- **Activity** / **Activities** tab - displaying the **Maintenance activity** /**(-ies)** information, such as details on the **Activity** itself, **Location**, **Asset**, **Tradesperson's notes (activity)**, **Meters**, **Observations** (on assets, spaces or properties), **Activity communication logs** (Documents and Images), **Related orders** and navigation button to go to **Checklist** items.



If there is only one maintenance activity linked, you will see its details directly on the **Summary** page. If there are multiple activities linked, you will see the maintenance activities in a list with search and filter options. Select a relevant maintenance activity from the list to navigate to the details.

PMFS workflow - Work assignments from start to finish

The following topics will guide you through the workflow on the app, from the moment you accept a work assignment, until you complete it and sign off.

Basically, you can distinguish two main types of workflow for work assignments on the app:

- those linked to **Orders**, usually reactive work or minor repairs
- those linked to **Planned maintenance orders** (PPM orders)

Actions

The workflow on the app is determined by the actions you select at the bottom of your screen, such as **Accept**, **Reject**, **Travel**, **Work** and so on.

Moving from one action to the next, means a *status transition* for the work assignment. A status transition, for example from **Work** to **Wait**, has implications for the labor hour registration and results in sending communication logs to the back-office. Any consequences of selecting the available actions will be explained in the respective topics.

Blocks

The information on a selected work assignment on the app is displayed over various blocks or cards as they are also often denoted. Each block represents a piece of information of the work assignment, its related order, asset, location, maintenance activities, checklists and so on.

Summary information

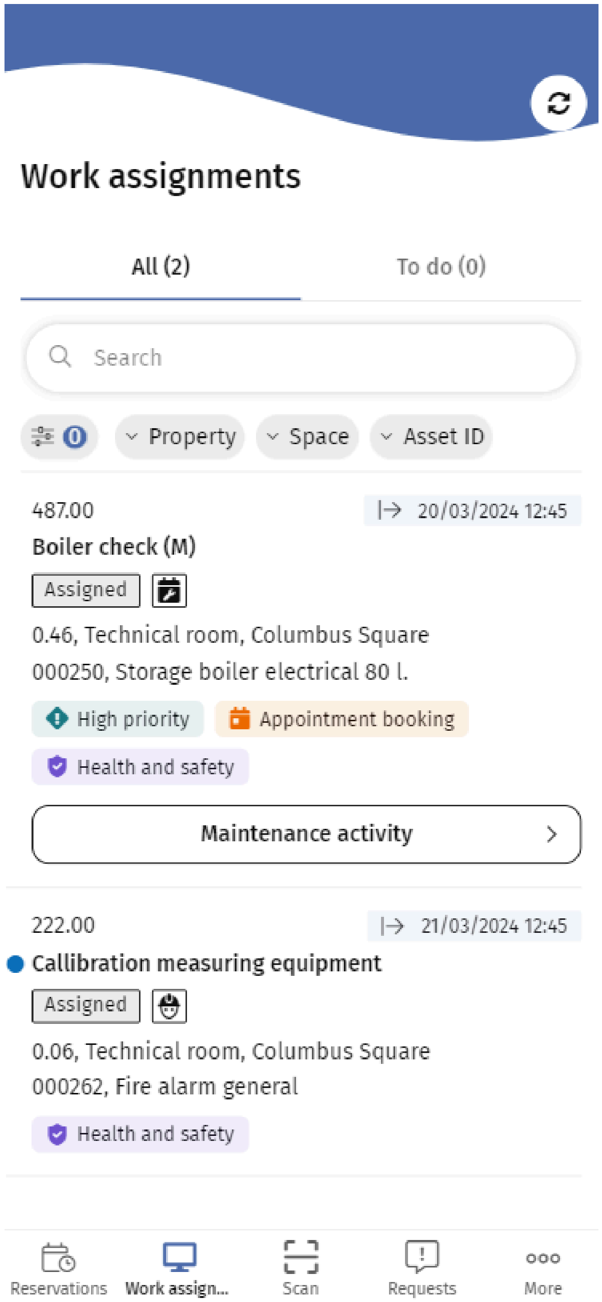
By selecting a specific block or an image you'll navigate to a summary with specific **details**, for example about the linked assets, materials, documents, labor hours and so on.

Accepting and starting a work assignment

After you have viewed the work assignment overview and opened (selected) a work assignment, you can accept it and move it to any relevant subsequent status.

Procedure

1. From the overview, select a relevant work assignment.



You navigate to the Summary page.

2. View the work assignment details.

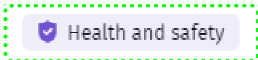
For example: you might want to check out the route to the location for example. Simply select the Get directions button on the Location block, to open your device's native navigation app. Planon will use the property's longitude / latitude information from its database to determine the route. However, if this data is not available and the navigation results depend solely on the address data of the property, the 'map' application can only provide a reliable route if this address data is complete (address and zip code).

3. Select Accept.

> If the work assignment is a team assignment and you are the first to accept, the work assignment will be removed from the other team members' devices. Please note that you must be online to accept the team work assignment. The back-office will know that you have accepted the work, because your name will be displayed in the order's **Internal tradesperson** field.

4. At this point, if a **Health & safety check** is required for the work assignment, you are notified.

Health and safety-related tasks can be recognized by their label on the start page:



This label is only shown if the back-office has set the EHS required? field to Yes for an order. Application managers can find information on configuring Health an safety pages and blocks at: Health and Safety in the PMFS solution.

5. If you are aware of the potential risks, select **Proceed**.

Or, … if you are not sure of the potential risks, select Cancel and request information from a relevant contact person.

6. If you selected **Proceed** and you are ready to start working on the assignment, select Work.

   An Edit page is displayed, where you can enter / edit information on accepting the work and select Next.

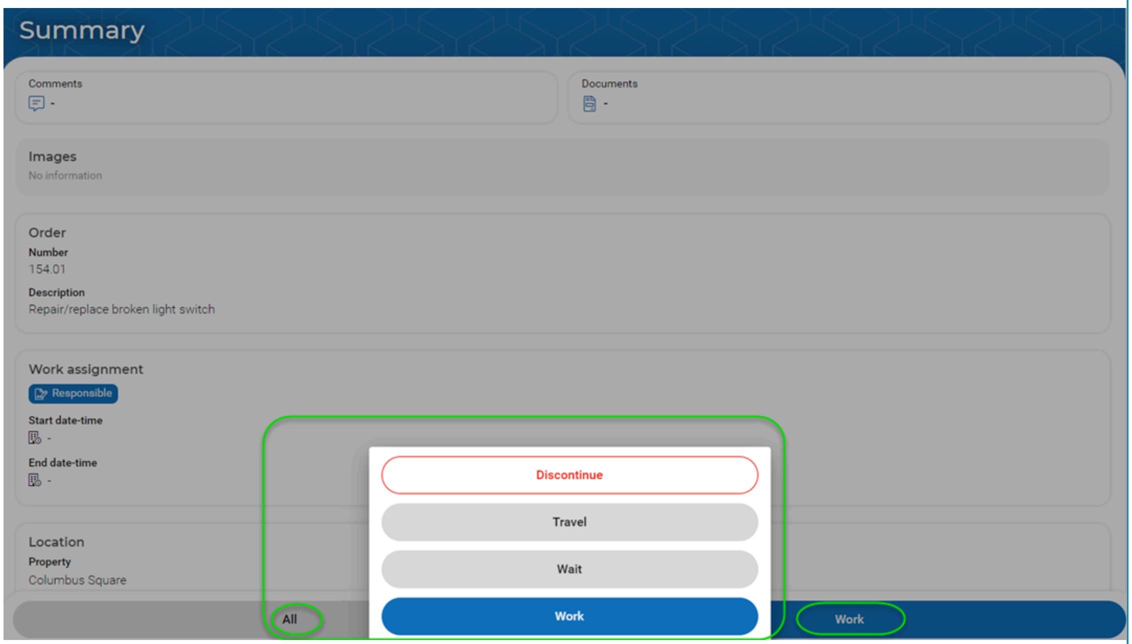
7. Now, if **Health & Safety** measures apply, you must first navigate several pages with applicable **Permits**, **Work-related activity types**, **Hazards**, **Method statements**, **Risk assessments**. Read the information carefully before selecting **Next** to go to the next page. In case one of the H&S criteria cannot be met, click the **Reject** button and return the assignment to the back-office.

> At this point, you may also have to fill in a **Questionnaire** before you can start working. More work-related questionnaires may be displayed at later stages during the work, for example if you select actions like **Travel**, **Temporary fix** or **Done**. It all depends on the configuration of your app. Application managers can find information on configuring work-related questionnaires at: Defining a scope for work-related questionnaires.
>
> **Good to know**: on the **Hazards** tab, you have the option to **add** a new hazard yourself. This may be useful if you encounter a hazard on site that is not listed for this task. Also see Adding a hazard via the app.

8. A confirmation message is displayed if you are allowed to start work. On the **Health & safety summary**, confirm that you understand and comply with all safety guidelines, by marking the check box.
9. Next, select Submit.
10. At this point, if you want to start the actual work, just stay where you are on the app.

11. If you do not start working immediately because you have to wait or travel for example, select All and then select an relevant action: **Pause**, **Discontinue**, **Temporary fix**, Travel, Wait.

the **Discontinue** action will stop the work assignment and remove it from your device! The back-office must now assess and reassign it.



12. If you chose to start the work, just proceed in the **Work** status and keep updating the various blocks on the **Summary** page as you go along. Just select a relevant block to navigate to its **Details** page and add or update the relevant details. For example Asset details, Meter details, Time spent (labor hours), Observations, Materials, Questionnaires etc.

See the next chapters for more information on adding and updating information, upload images, documents or comments, or on filling in questionnaires.

13. When you the work is completed, you can set its status to **Done**.

    The work assignment will be removed from you device and returned to the back-office.

Viewing Health and Safety details and adding a hazard

Before and during work, you can view a work assignment's applicable **Health & safety details**, such as:

- Permits
- Risk assessments
- Method statements

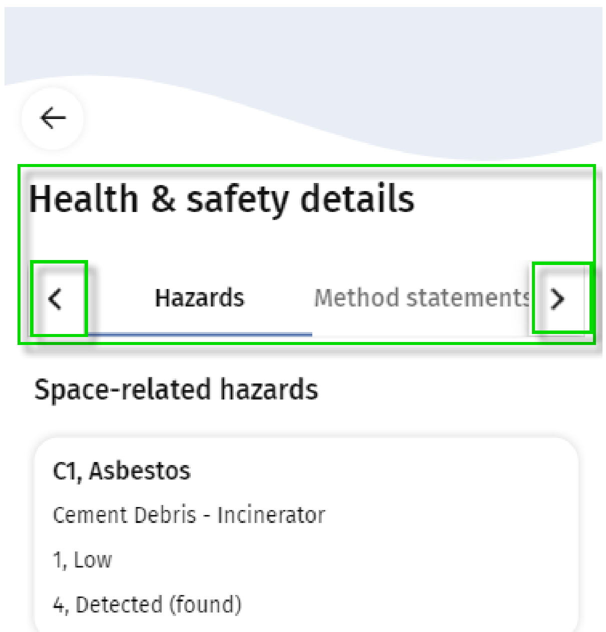
- Activity types (work-related activities that may be subject to hazards from the Planon Hazard registry)
- H&S questionnaires
- Hazard types

Besides viewing existing hazards, you can also add new hazards. See the procedure.

- Procedure

1. On the Work assignments **Overview** page, select the relevant work assignment.
2. On the Summary page, view and select the Health & safety block.
3. On the **Health & safety details** page, navigate to the relevant *tab(s)*.

The following image shows the Health and safety details page on a mobile phone.



Which Health & Safety tabs are displayed on the app depends on your configuration. The tabs may include Permits, Activity types, Hazards, Method statements, Risk assessments and Questionnaires.

On the **Hazards** tab, you cannot only view known hazards, but you can also add a new hazard to the order, which you may have discovered on site. See Adding a hazard via the app for the procedure. Similarly, on the **Activity types** tab, you can links additional, relevant activity types to the work assignment. See Linking activity types via the app.

4. View the details and select an item to navigate to more specific details, for example **Hazard details**.

The details might also include linked Images and Documents.

Adding a hazard via the app

Besides viewing the hazard information that the back-office added to the work assignment, you can also add a new hazard to the work assignment you are about to start or have already started.

There are two points at which you can add a new hazard via the app.

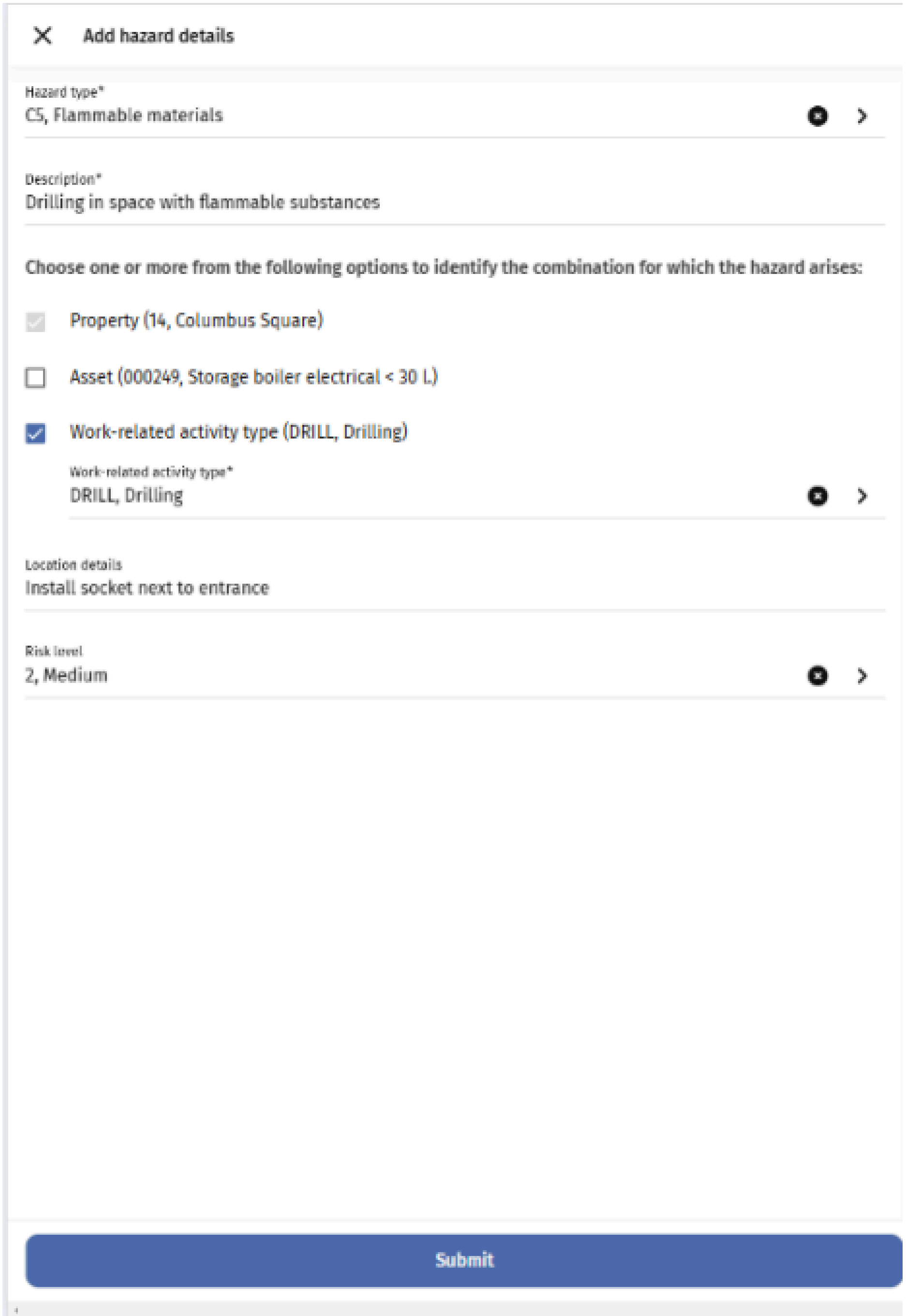
- You have selected the **Work** status on a work assignment with a **Health and Safety** label. You navigate through the **Health and Safety** wizard and arrive at the **Hazards** tab.
- You are already working on an order. You discover that you have to register a new hazard for this order. On the **Summary** page, you select **Hazards** on the **Health & safety block** and navigate to **Health and Safety details** page > **Hazards** tab.

Procedure

1. In the wizard, on the **Hazards** tab, check the listed hazards that apply to the selected work assignment. Verify that the hazard you want to add is not listed already.
2. To add the new hazard, click the **+** icon at the top of your screen.

   The Add hazard details page opens.
3. Fill in the mandatory and any other relevant fields.
4. At **Choose one or more from the following options to identify the combination for which the hazard arises**, select the options that apply to the new hazard.

The combination of Property, Asset and Work-related activity type determines the hazard's context. In the following example, the hazard is applicable to the Columbus Square property when the work-related activity is Drilling.



5. Select **Submit**.

   The hazard is created and added to the work assignment's Hazard details page. When you are online, the information is also updated to the back-office.

Similarly, you can add a new hazard starting on the **Health and safety** details page > **Hazards** tab. The only difference is that the **Add hazard** button is at the bottom of the **Hazards** tab.

From step 3 onwards, the procedure is the same as described above.

Linking activity types via the app

Besides viewing the work-related activity types that the back-office added to the work assignment, you can also link additional, relevant activity types to the work you are about to start or have already started.

There are two points at which you can link a work-related activity type to the work assignment via the app.

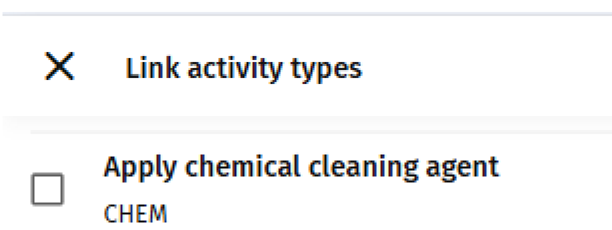
- You have selected the **Work** status on a work assignment with a **Health and Safety** label. You navigate through the **Health and Safety** wizard and arrive at the **Activity types** tab.
- You are already working on an order. You discover that you have to link an additional activity type to this order. On the **Summary** page, you select **Activity types** on the **Health & safety block** and navigate to the **Health and Safety details** page > **Activity types** tab.

Procedure

1. In the wizard, on the **Activity types** tab, check the listed activity types that apply to the selected work assignment.
2. To link the activity type, click the **+** icon at the top of your screen.

   The Link activity types page opens.
3. Select the relevant work-related activity type from the list.

> the list only displays activity types that are defined as 'common' in Planon.



4. Select **Submit**.

   The activity type is linked and added to the work assignment's Hazard details page. When you are online, the information is also updated to the back-office. Similarly, you can link an activity type starting on the Health and safety details page > Activity types tab. The only difference is that the Link activity types button is at the bottom of the tab.

The rest of the procedure is the same as described above.

Adding / deleting a comment

You can upload your own comments to a work assignment. These comments and any other comments made by co-workers working on the same order, are displayed in the **Comments** block at the top of the page. This block can be used for the internal communication between you and any other people working on the same order.

> This option is already available when the work assignment is still in the **Accepted** status.

Procedure

1. On the Summary page, select the Comments block.

   You navigate to the Communication logs details page.

2. Enter you comment in the text field at the bottom of the screen.
3. Select the Upload button to add your comment to the work assignment.

   Co-workers working on the same order and the back-office will see the new comment directly. The comments are logged at the back-office as communication logs on the order (they are labeled as Tradesperson's comments).

4. If configured on your app, you can also *delete* a comment you added yourself, by clicking the **garbage bin** icon next to the comment.

Adding, downloading or deleting an image

You can add new images to a work assignment. You can either upload an image from the photo library on your phone or take a picture from within the app.

> This option is already available when the work assignment is still in the **Accepted** status.

Procedure

1. On the Summary page, select the Images block.
2. Tap **Add image**.
3. From the 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, .png

4. Enter a Description and optional Comments.
5. Select Submit.

   The image is added to the work assignment. The back-office will receive a communication log with the new image.

In the same way, you can also add images after navigating to the **Image details** page.

6. If configured on your app, you can also *delete* an image you added yourself, *download* an image, or *remove a downloaded image from your device*, by clicking the **Select** button, selecting the relevant image(s) and then clicking **Select items ...** at the right.
7. Select the relevant action from the **Available options** menu.

Adding, downloading or deleting a document

You can upload documents from a folder your mobile device to a work assignment. The number of file types you can upload is limited.

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

This option is already available when the work assignment is still in the **Accepted** status.

Procedure

1. On the Summary page, select the Documents block.

   You navigate to the Communication logs details page.

2. Select the Add document button at the bottom of the screen.
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 you mobile device.
6. Select Submit.

   The document file is added to the work assignment. The back-office can access the new document via the communication logs on the order.

7. If configured on your app, you can also *delete* a document you added yourself, *download* a document, or *remove a downloaded file from your*

device, by clicking the **Select** button, selecting the relevant document(s) and then clicking **Select items ...** at the right.

8. Select the relevant action from the **Available options** menu.

Adding / editing tradesperson's notes

As tradesperson / engineer you have the option to add your personal notes to a work assignment / maintenance activity, after you have *accepted* the work on your app. These personal notes are only visible to you on the app, but they are later logged at the back-office (as communication logs). Any co-workers working on assignments that belong to the same order cannot see these personal notes. If you want to share information with them, use the **Comments** block at the top of your screen.

Procedure

1. On the Summary page (or **Maintenance activity summary** page on a PPM order), tap the plus icon om the Tradesperson's notes block.

   The Add tradesperson's notes details block is displayed.

2. Enter you notes in the text box.
3. Select the Submit button to add your notes to the work assignment / maintenance activity.
4. If you want to edit or add more notes, simply repeat the procedure and update the existing text as required.

   The back-office will see the new note directly if you are online. Your notes are stored on the order via a communication log (the notes are labeled as Tradesperson's notes).

Adding / changing / confirming an asset on the Asset block

It might happen that an asset is either not filled in on the work order, or has been filled in incorrectly. In that case, you can add or change an asset. You can also get confirmation that you are working on the right asset or find its location in a BIM model. Additional actions for assets are available on the **Asset details page**. See 'Asset actions' on the Asset details page for more information.

Procedure

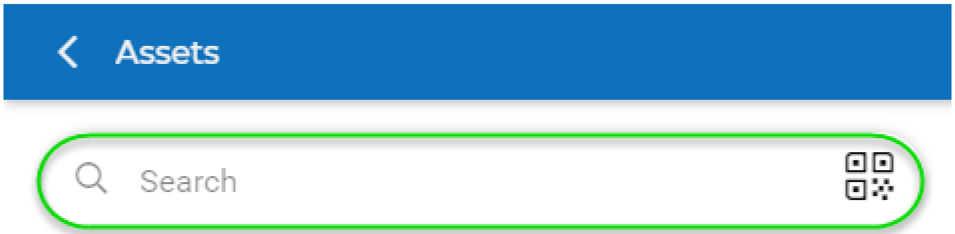
1. On the Summary page, select the Assets block.

If the asset you want to work on is not linked to the order yet, select the plus icon on the right.

Select it from the list, or to enter it manually. If you cannot find it in the list, enter (part of a) search term in the Search field and confirm with Enter.

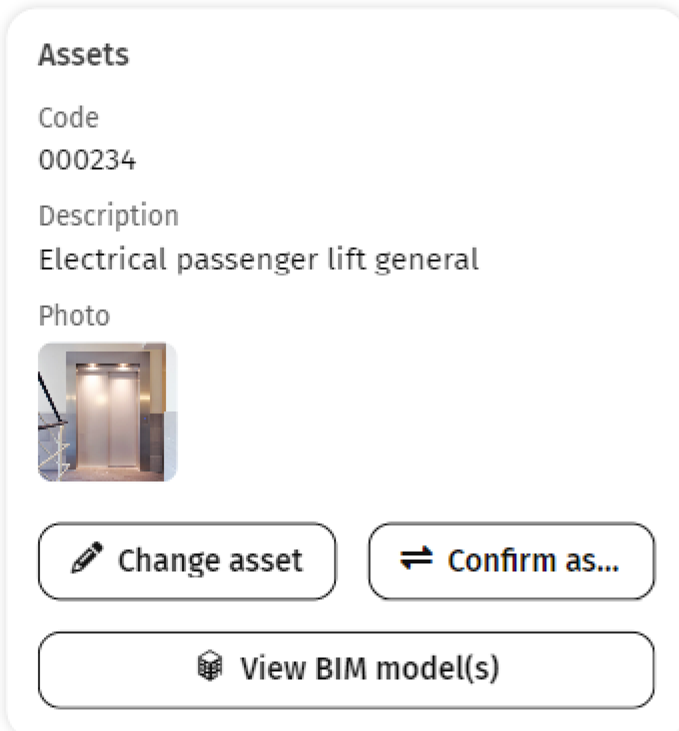
> Searching and selecting assets from the list is only possible if you are online.

2. If the asset you are looking for is not listed, you can tap the scan QR code icon in the search bar to scan the asset code / tag.



3. You can also enter the asset code / asset tag by selecting the Enter manually button at the bottom of the screen. Fill in the asset code / asset tag and tap Submit.

   On the Summary page > Assets block the latest asset information is displayed:



   You are requested to refresh the **Summary** page to see the full asset information.

4. If you want to select another asset for this order, select **Change asset** and search for the relevant asset in the list or enter it manually.

> The **Change asset** option is only available if the related order is not a planned maintenance (PPM) order.

5. If you need confirmation that you are working on the correct asset, select the **Confirm asset** action at the top of you screen.

The **Confirm asset** option is available for both **Orders** and **Maintenance activities**.

Type or scan the asset code and tap the **Check asset code** button. A toast message shows whether the asset code matches or not.

6. If you want to view the asset in an associated BIM model, select **View BIM model(s)**. See Viewing an asset's BIM model for more information on viewing a BIM model in the app.

'Asset actions' on the Asset details page

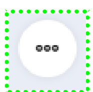
On the **Asset details page** of a work assignment, you can access several actions that are specifically available for assets.

Procedure

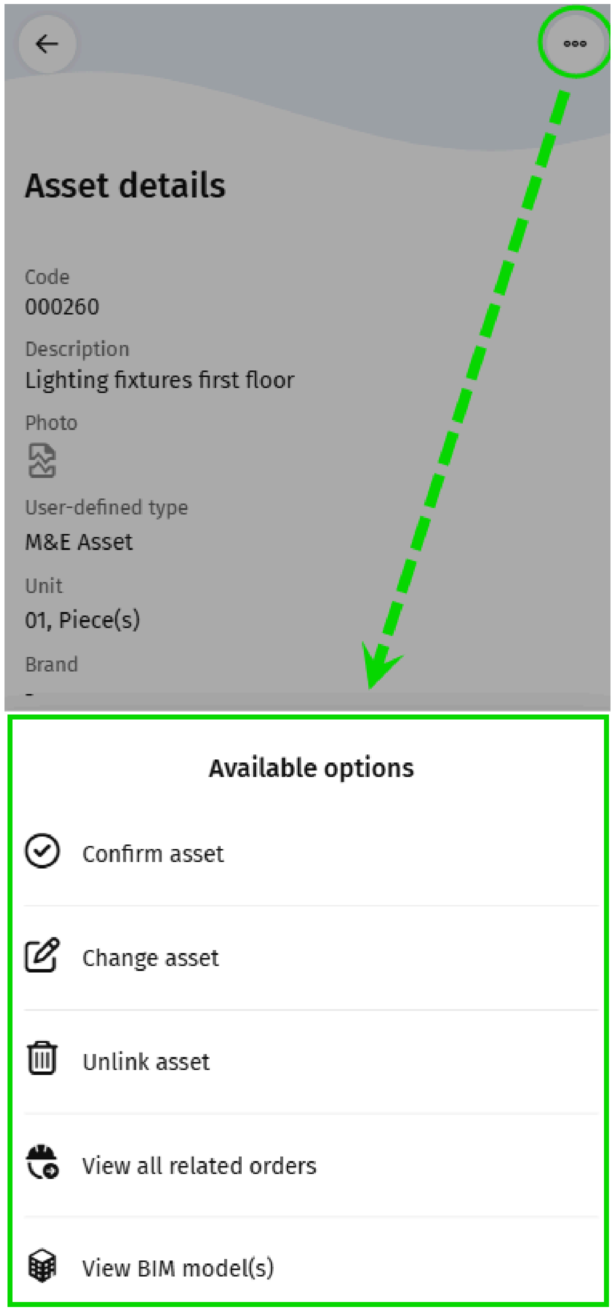
1. On the Summary page, select the Assets block of the selected work assignment.

The **Asset details page** opens.

2. Tap the following button to open a list of available asset-related actions:



3. From the slide-up menu, select the relevant asset action:



- **Confirm asset** - allows you to check if you are working on the right asset
- **Change asset** - allows you to select a different asset fro the list or manually enter an unlisted asset
- **Unlink asset** - allows you to unlink the asset from the order altogether
- **View all related orders** - directs you to related orders in the **Orders** module
- **View BIM models** - displays the asset by loading a linked BIM model in the BIM viewer.

Which actions are available depends on your app configuration. Contact your app administrator for more information.

Downloading assets for offline use

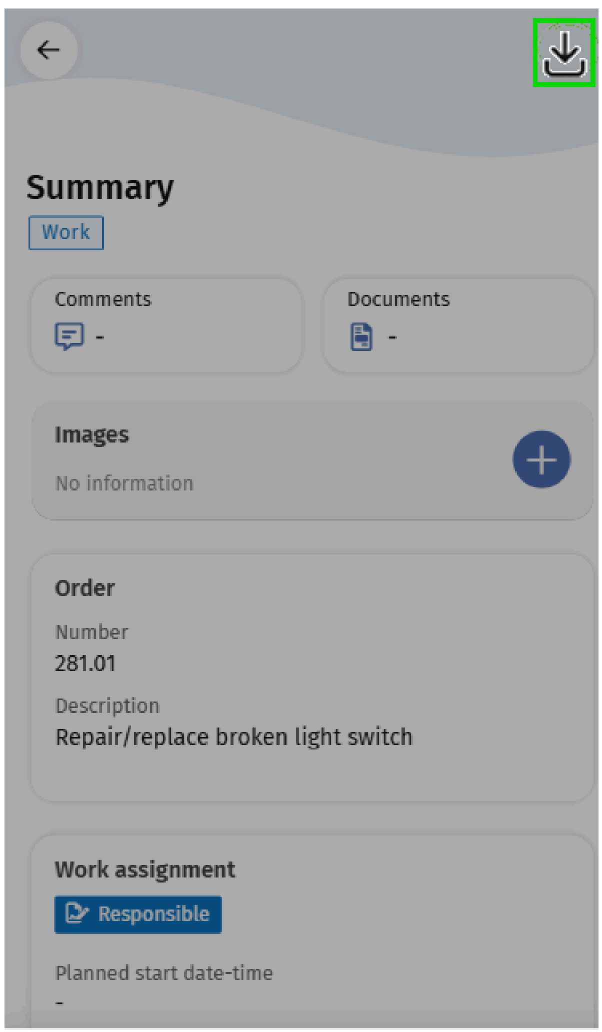
If you need to work in an 'offline' location and want to have the most up-to-date asset information, you can download all relevant asset information before going offline.

You can even edit the asset records during the offline period. When you have internet connection again, the updated asset data will be sent to the back-office.

Precondition: the **Download asset** action must be configured on your app.

Procedure

1. In the **Work assignments** module, select the order that you will be working on offline.
2. At the top of the **Summary** page, select the download button.



The asset is downloaded and is available for offline viewing and editing in the Assets module > Download tab.

Good to know: if the back-office makes essential changes to assets after they are downloaded, for example by changing the asset's status to **Disposed**, by archiving the asset or by deleting it, the downloaded asset will be removed from the device after the next synchronization. In technical terms, this also means that its 'envelope' is revoked and cleaned up.

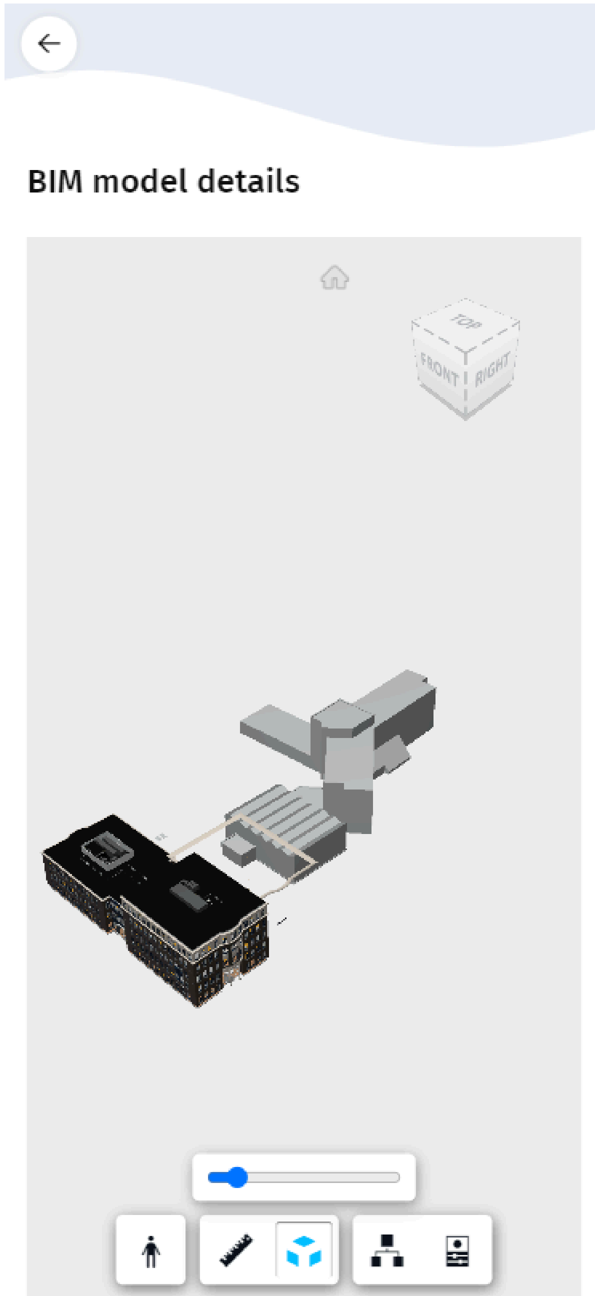
Viewing an asset's BIM model

From the **Assets** block on the **Summary** page you can navigate to a linked BIM model that includes the asset you are working with.

Procedure

1. On the work assignments Summary page, navigate to the Assets block.
2. Select the select **View BIM model(s)** button.

   The BIM model details page opens and the linked model is loaded.



3. When the model is loaded, use the toolbar buttons to navigate to the asset's BIM details.

For more information on using the toolbar buttons, see: BIM viewer.

Adding meter readings

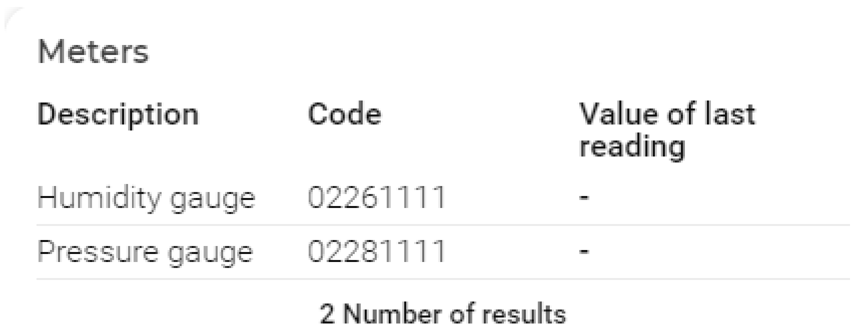
The **Add meter readings** feature is available on the app for:

- Orders (**Meters** block and **Meter details** page)

- Maintenance activity (**Meters** block and **Meter details** page)

Procedure

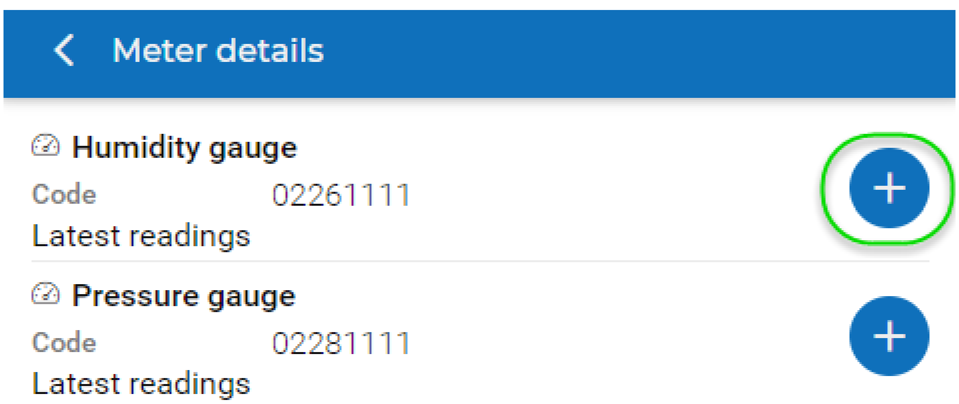
1. On the Summary page, scroll towards the Meters block.
2. If there is only 1 meter linked to the asset, select the Add meter reading button (plus sign) to start adding the meter reading directly,
3. or … if there are multiple meters linked ...


Meters

Description	Code	Value of last reading
Humidity gauge	02261111	-
Pressure gauge	02281111	-

2 Number of results

4. … select the **Meters** block to navigate to the **Meter details** page and add the meter reading there:



5. Select the Add meter reading button (plus sign).

> - If the linked asset is a multiple asset, the **Add** action is unavailable.
> - If the linked meter is a main meter of a combined meter that has no reading data attached, the **Add** action is also unavailable.

6. On the Add meter reading details page, enter a Reading value, select a **Reading date-time** and optionally add Comments.
7. Select Submit.

> If the meter reading is outside its threshold range you will be warned. You have the option to proceed with adding the value (if it is correct), or to cancel submitting it, in order to edit

an incorrect value or to consult a colleague / professional on the matter, before you add the meter reading.

Once submitted, the new meter reading is confirmed and sent to the back-office.

Answering questionnaires via the Summary page

You may be asked to complete one or more questionnaires for a work assignment while it is on the app.

Apart from fixed questionnaires at the start (Health and safety) and finish (Sign-off), intermediate or *dynamic* questionnaires may be displayed that you must fill out while the work is still in progress. For example on the **Summary** page of the work assignment. This type of questionnaire can be completed step by step, throughout the entire duration of the job.

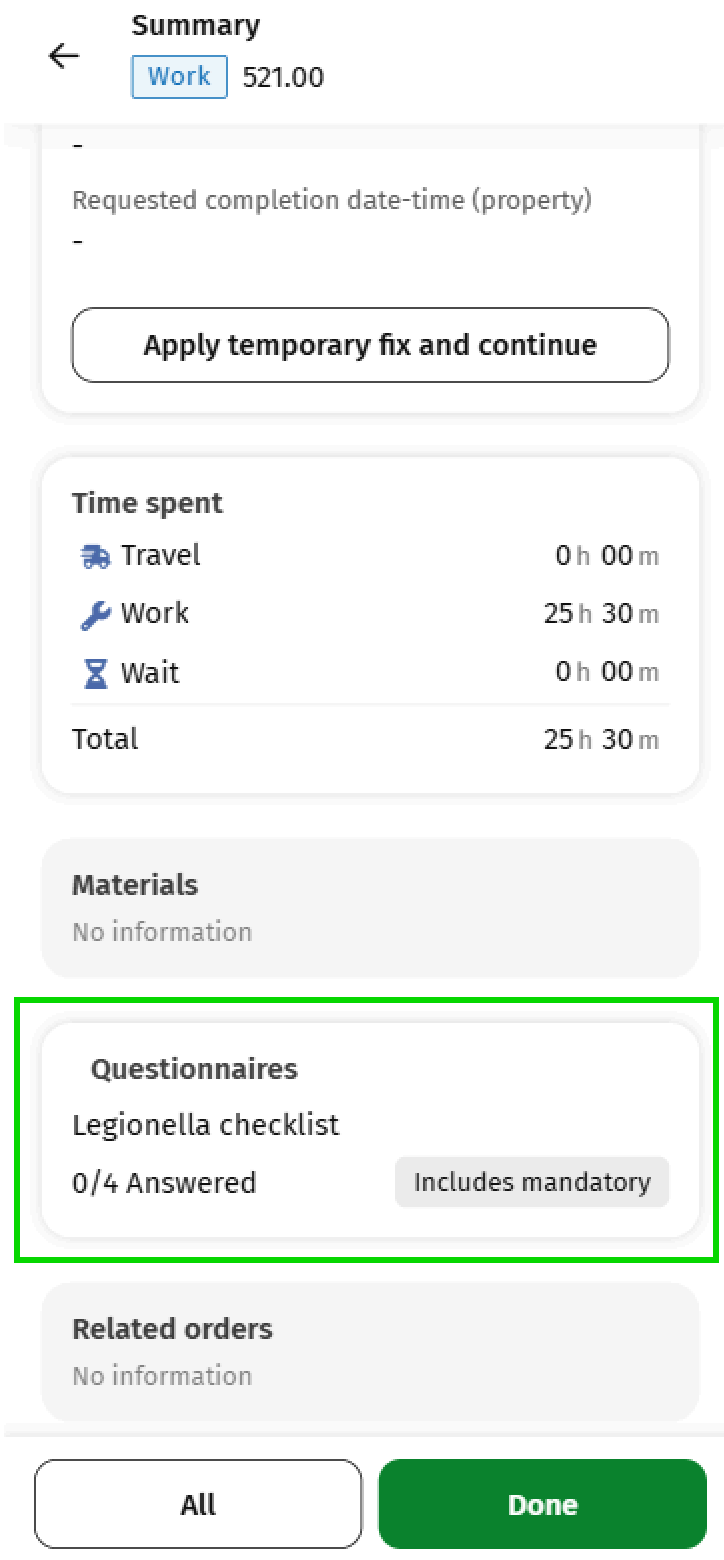
For information about the fixed questionnaires, displayed at the start or finish of a work assignment, also see Viewing Health and Safety details and adding a hazard and Ending a work assignment and signing off.

Procedure

1. You have accepted a work assignment on the overview page and selected the **Work** status.

After that you may have navigated several Health and safety pages and confirmed that you understood and complied with the guidelines.

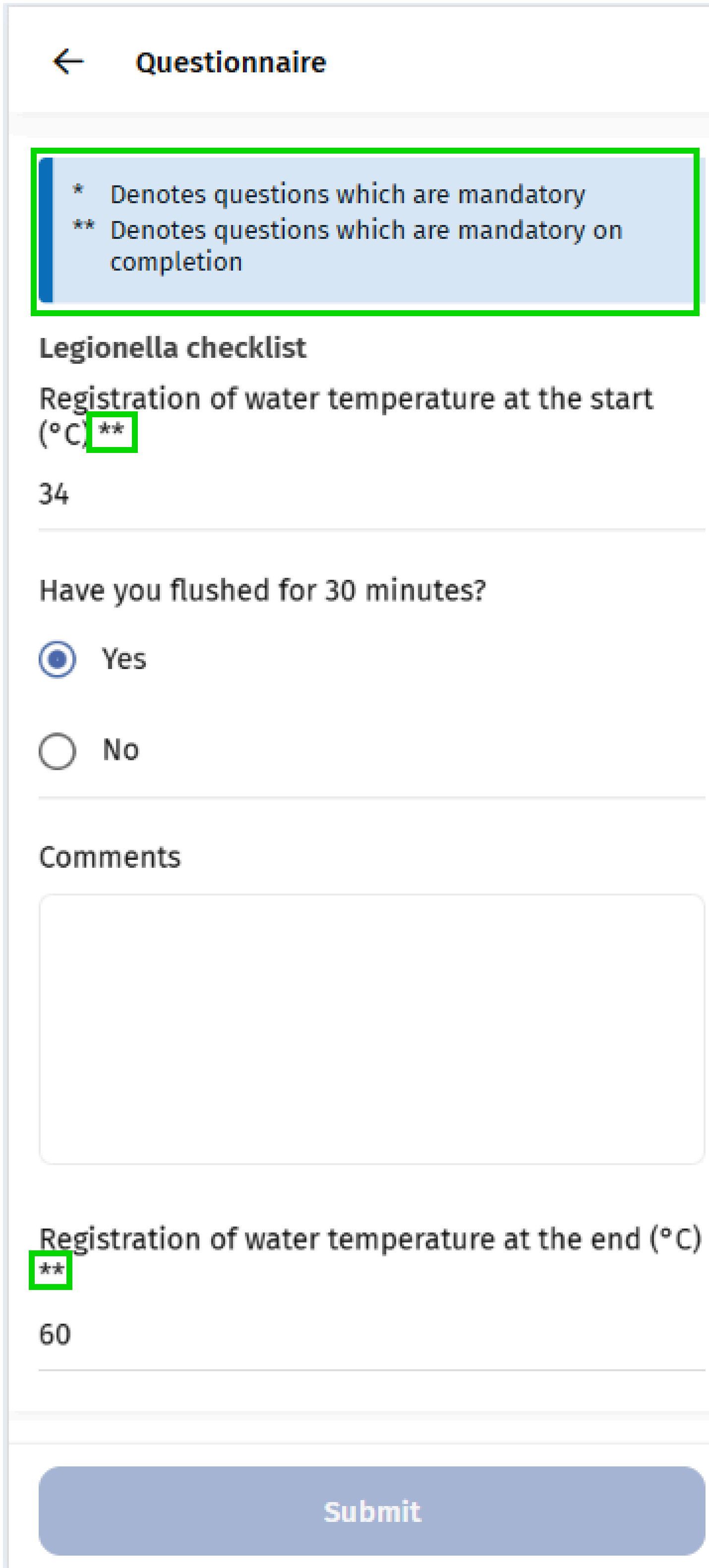
2. Select Submit.
3. Now, on the **Summary** page, go to the **Questionnaire** block to see if any questionnaires are available.



Summary
Work
521.00
-
Requested completion date-time (property)
-
Apply temporary fix and continue
Time spent
Travel
0 h 00 m
Work
25 h 30 m
Wait
0 h 00 m
Total
25 h 30 m
Materials
No information
Questionnaires
Legionella checklist
0/4 Answered
Includes mandatory
Related orders
No information
All
Done

4. If so, select the block to navigate to the questionnaire. In case there are multiple questionnaires linked, you must first select a relevant one from a list.

The questionnaire(s) may include mandatory questions or questions that are *mandatory on completion*. These questions must be filled in before you set the work assignment to **Done**. This is clearly indicated on the app.



5. Fill in the questionnaire(s) at the appropriate time during the job.

6. When you have filled in the form, select **Submit**.

   The Summary page is updated with the latest answer count.

Another possibility is that you are prompted to fill in a questionnaire when you change the work assignment's status, for example from **Travel** to **Work**. See Answering questionnaires upon a status change for the procedure.

Answering questionnaires upon a status change

You may be asked to complete one or more questionnaires for a work assignment while it is on the app.

Apart from fixed questionnaires at the start (Health and safety) and finish (Sign-off) of a work assignment, you may be required to complete questionnaires while the work is in progress. These are *dynamic* questionnaires.

> For information about the 'fixed' questionnaires, displayed at the start or finish of a work assignment, also see Viewing Health and Safety details and adding a hazard and Ending a work assignment and signing off.

When you change the status of your work assignment - for example from **Work** to **Temporary fix** - you may be prompted to answer a questionnaire. See the following procedure:

Procedure

1. You have accepted a work assignment on the overview page and selected the **Work** status.

After that you may have had to navigate several Health and safety pages and confirm that you understand and comply with the guidelines. You submit the health and safety information and start working on the work assignment. At some point during the work, you discover that you need to select a different status than Work for this job. In this example it is Temporary fix.

2. At the bottom of your screen, select **All** > **Temporary fix**.

The Edit 'Temporary fix' page is now displayed, prompting you to add a reason for status change.

3. Select a reason and tap **Next**.

   The questionnaire that is linked to this status change is displayed.

4. Fill in the questionnaire and select **Next**.

   You are directed to the Engineer's overview.

5. View the details and select **Next** to navigate to the **Sign-off page.**
6. Complete the work assignment by signing off.

Another possibility is that you are required to fill in a questionnaire that is on the **Summary** page > **Questionnaire** block. See Answering questionnaires via the Summary page for the procedure.

Planned, used and required materials during work

Upon starting a job in **Work assignments**, the **Materials** block shows you the materials anticipated for the job, in quantities planned by the back-office. This does not mean that you are actually going to use all materials in the specified quantities. The following sections explain how you can edit the materials you used, and how to request additional materials.

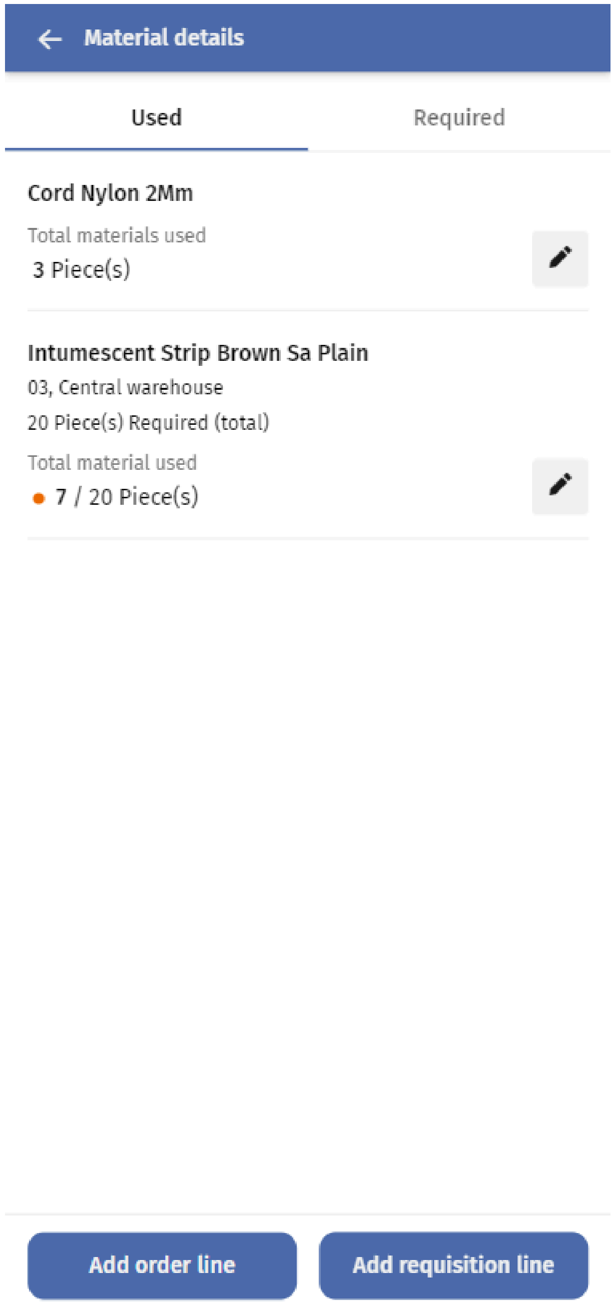
Planned / Used materials

The back-office can register any materials that you may need for a job in advance. These are *planned* materials. It is possible to edit the used quantity of these material(s). You will see them listed on the **Materials** block when you start a job.

The materials planned by the back-office and any materials you ordered and picked up on the job, are displayed on the **Used** tab of the app. This also applies to any materials you use from your own mobile store.

When the work is in progress (status **Work** on the app) and you know exactly which materials you have actually used, you can edit the quantity of these material(s) by selecting the pencil icon and changing the quantity.

> Your edits are synchronized with the back-office (**Orders** TSI > **Order subdetails** level > **Used lines** step). Conversely, the app will also notify you about any changes back-office staff make, for example to **Order lines**, **Requisition lines** and **Used lines** (the items on the **Used** tab).



Required materials

If you need to request additional materials from the product catalog, or if you need to register the materials you take from your self-managed store / mobile store, you can add a *requisition line*.

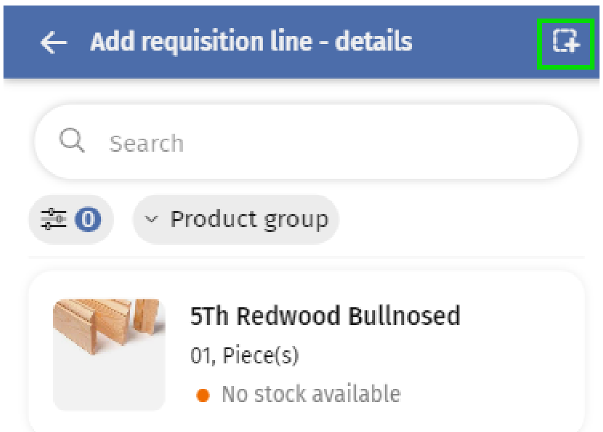
> The product catalog is only available if you have an internet connection.

If the materials are in stock, the app's **Required** tab will show you the locations where you can request them and their status. You can also monitor the progress / status of your requested materials in the **Materials** module, on the **Inbound** tab. When the materials are ready to be picked up, you can confirm the receipt in this module, by selecting the **Receive materials** button. From that point, the materials will be listed on the **Used** tab of the **Materials** block in the **Work assignments** module.

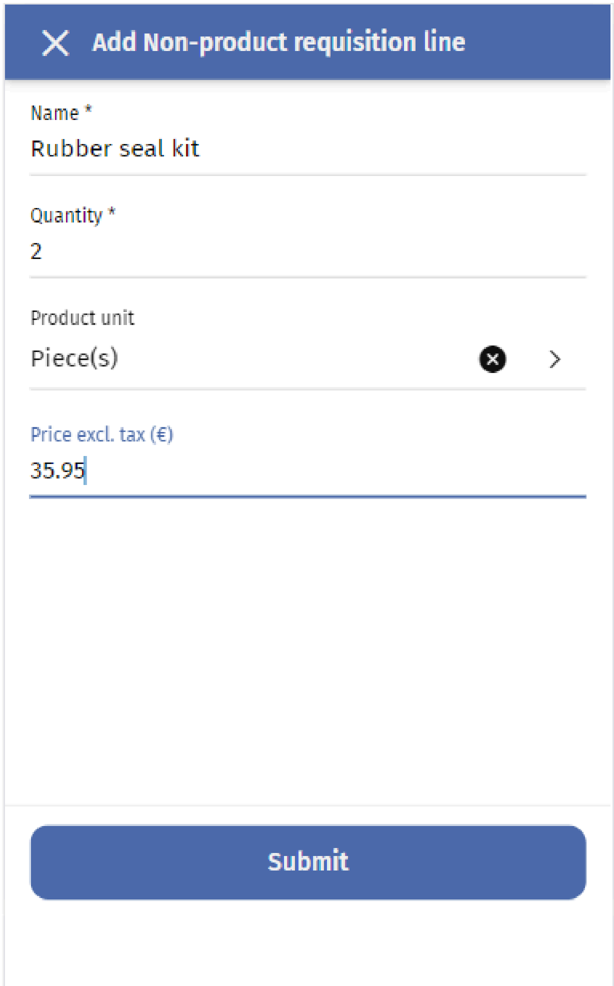
If no stock is available for the product you requested, the stock needs to be replenished first. Go to the **Materials** app module to keep track of your requested materials.

Good to know:

- You can also add a requisition line for products that are not *listed* on the app, by selecting the **Add a 'non-catalog' product** button in the header of the **Add requisition line - details** page.
- You can delete a requisition line if necessary, but only if you added it on the device yourself and if its status is still **Reported**.



You can enter the product details on the next page.



After submitting the requisition line, the requested product is added to the **Materials details** page > **Required** tab.

If your organization does not use Planon's **Demand and Supply** solution (**Stock** management) you can add *order lines* instead of *requisition lines*. See Adding and editing order line records (Used materials). This order line is displayed on the **Used** tab of the **Materials** block in the **Work assignments** module.

Adding and editing order line records (Used materials)

You can register additional materials while you are working on a work assignment. You can do this on the app by adding an order line.

Prerequisite for adding materials: the selected work assignment must be in the **Work** status.

If your organization uses Planon's **Demand and Supply** solution (**Stock** management) you can add *requisition lines* and order the materials from a product catalog. For information on adding requisition lines on the app, see Planned, used and required materials during work.

Procedure

1. On the Summary page, select the Materials block.

   You are directed to Materials details.

2. Tap the Add order line button at the bottom of the screen.
3. Fill in the Add order line details form: Description, Quantity, Product unit and so on.
4. Tap Submit.

   The order line is added to the Materials details page > Used tab. You can edit the order line by selecting the Edit button:

   Enter your edits as required and select **Submit**.

The order lines are also displayed on the **Engineer's overview** when you complete the work.

Any materials that were already added to the order by the back-office, the so-called *planned materials*, are listed in the **Used** section. You can edit them by clicking the **Edit** (pencil) icon. You cannot delete them. However, it is possible to delete order lines that you added yourself on the device and that are not yet finalized. You can delete such order lines by selecting them and clicking the waste bin icon.

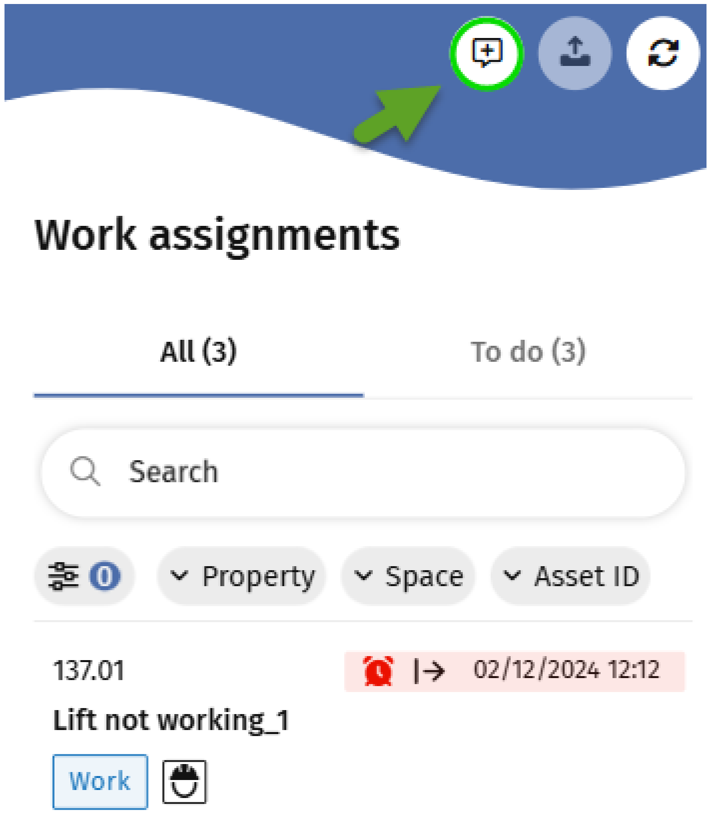
Adding a request via the app

When you are working on site, you may want to submit a request about an issue that you have encountered. You can submit a request via the app, even if you are offline. The request is saved on your device and sent to the back-office when you are online.

You have started work on a work assignment and want to report an issue to the back-office. In that case you can submit a request.

Procedure

1. At the top of the module's start page, select the **Add request** icon.



The Add request details form is displayed.

2. Select a the **Standard order** that matches your request.
3. Select the **Property**, the **Space** and the **Asset** to which your request applies.
4. Add a **Comment** and / or an **Attachment** as required.
5. Tap **Submit**.

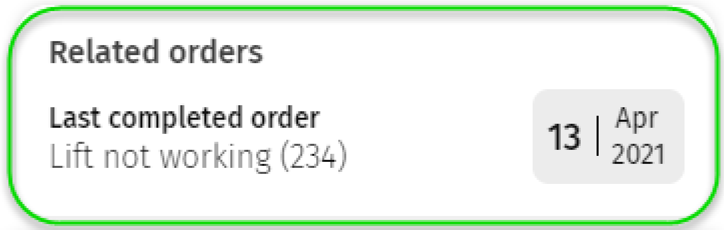
You get a confirmation that your request is sent to the back-office.

Viewing related orders

You might want to check past or future work that was / is going to be carried out on the *asset* that is linked to your work assignment. These related orders might provide some insight into the history and planning of the asset you are currently working on. Follow the procedure to see the contextual order information.

Procedure

1. On the **Overview** page, select a work assignment.
2. At the bottom of the Summary page, select the Related orders block.

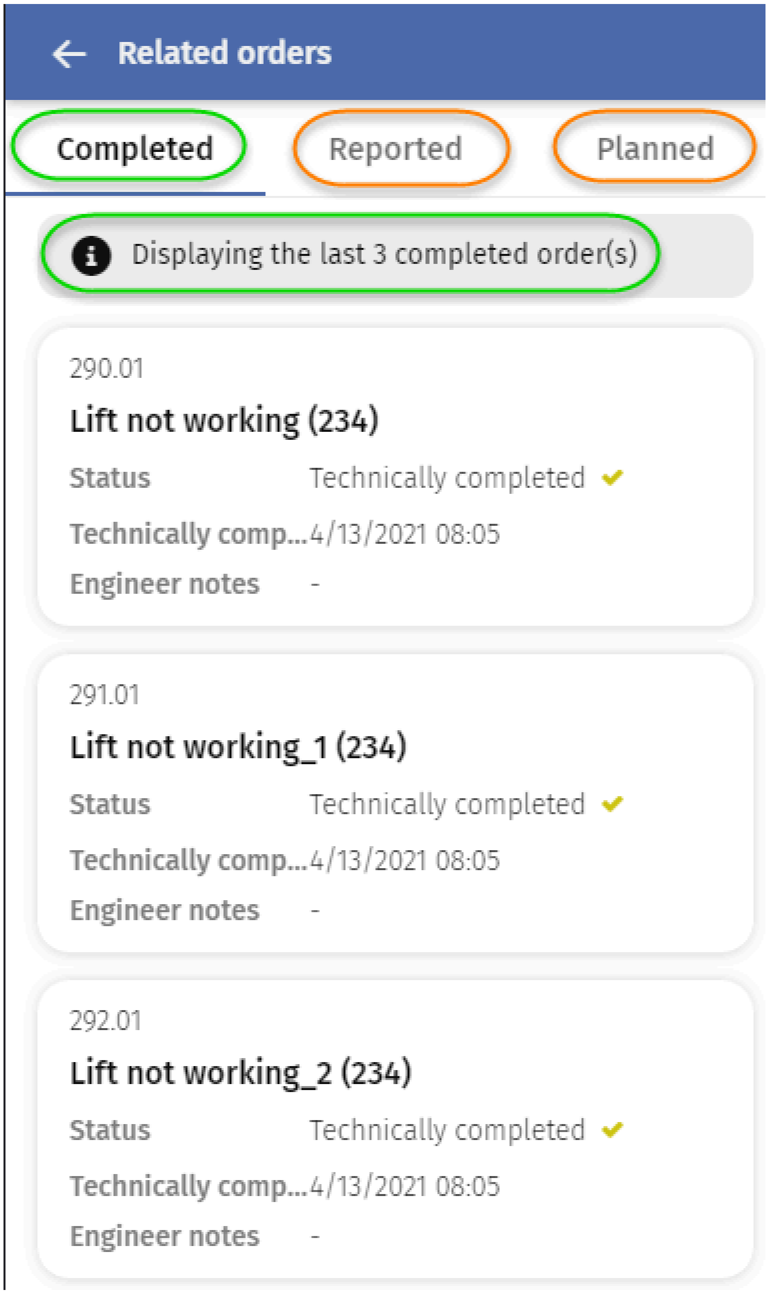


If you selected a PPM order, navigate to the Maintenance activity tab and select the Related orders block there.

You are redirected to a details page.

3. View the related orders on the 3 tabs. Each tab includes information on the last 3 orders that were **Completed** / **Reported** / **Planned** for the asset (in this case a lift) that you are currently working on.

  - **Completed** tab: shows the linked work orders and PPM orders with linked maintenance activities which are technically or administratively completed (completion date is in the past).
  - **Reported** tab: shows all non-completed work orders or requests linked to the asset that have an **Original start date-time** in the past.
  - **Planned** tab: shows PPM orders with a maintenance activity linked to the asset, which are not administratively completed, technically completed or canceled and whose maintenance activity date is in the future.



4. Navigate back to the **Summary** page to select the **Work** action and start working on the assignment.

Viewing requestor-related information on Parent order block

If configured on your app, you can check information from the original Request (parent order) related to your work assignment. You can see who requested the work and view relevant information such as:

- answers given in an intake questionnaire

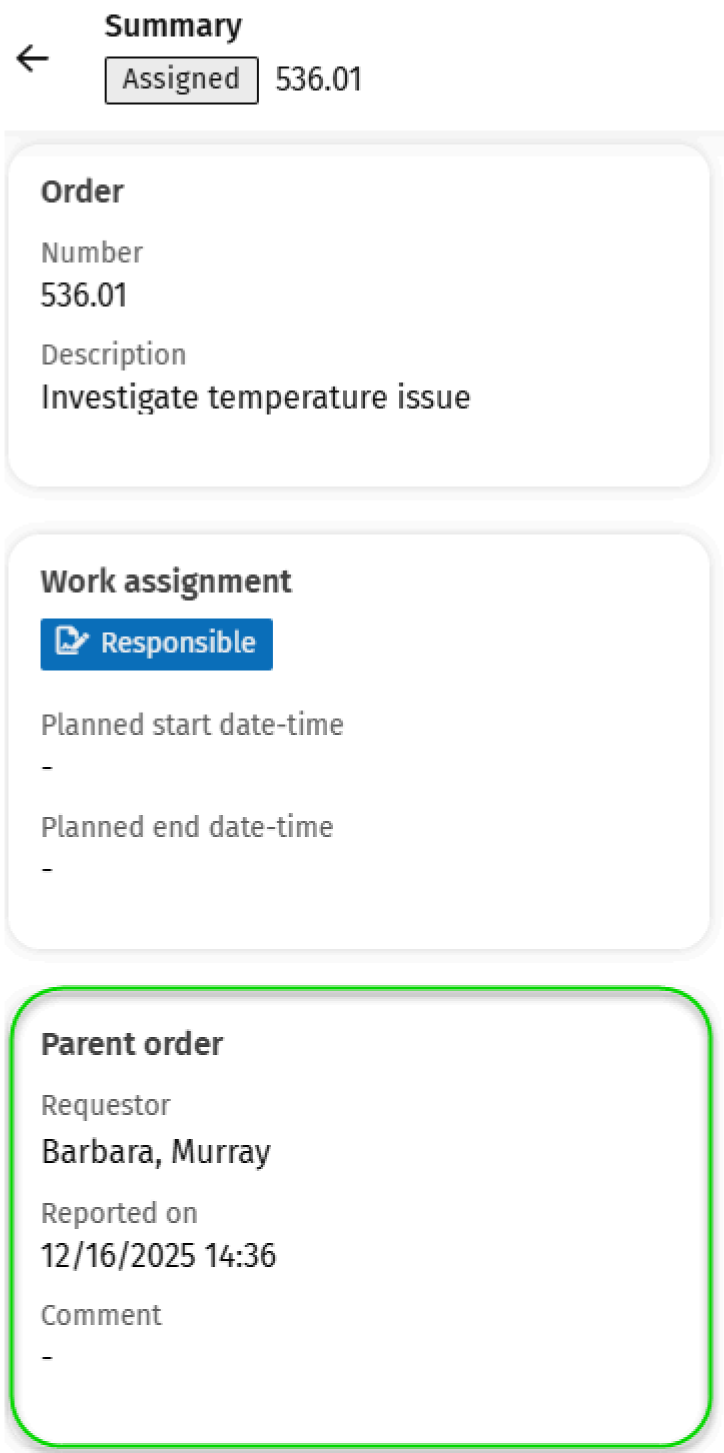
- comments added by the back-office

Procedure

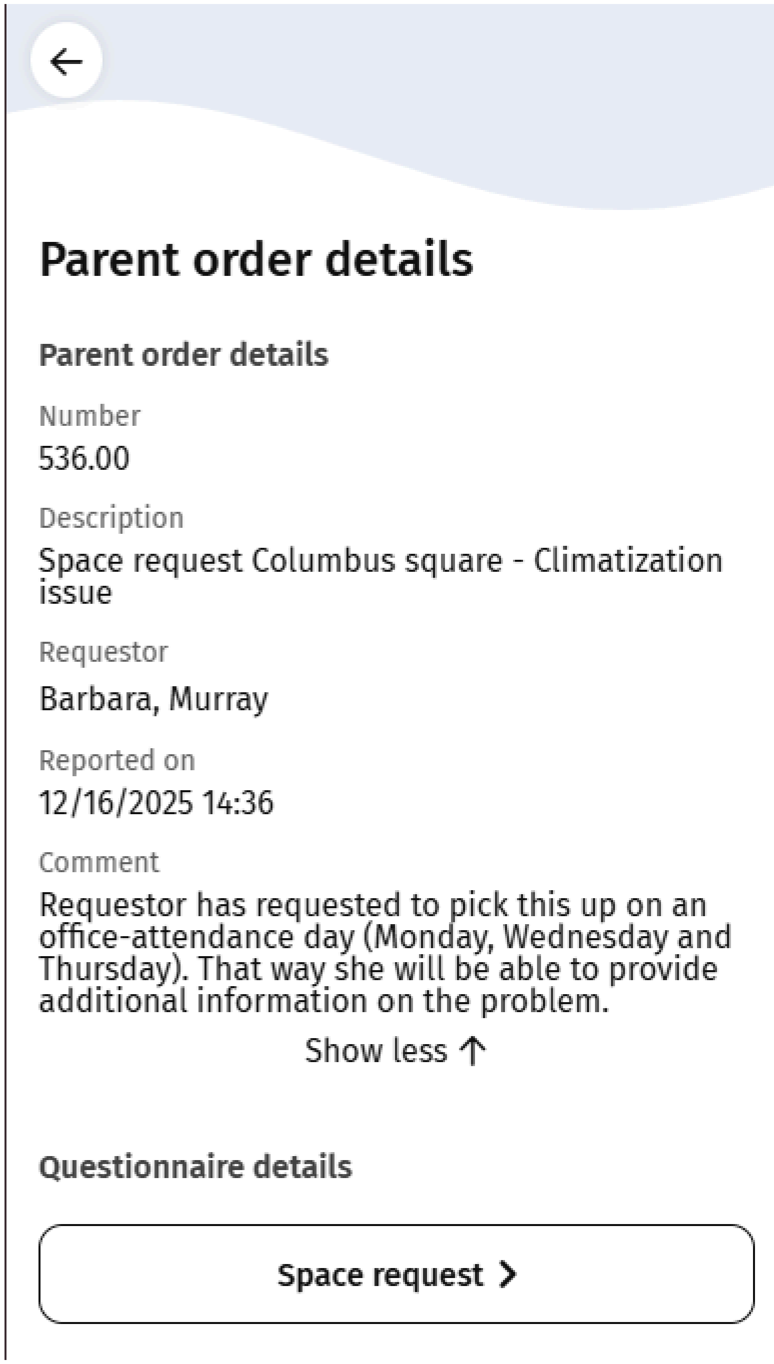
1. On the app, open / download the work assignment.

Before you accept the work, you can already view the request-related information.

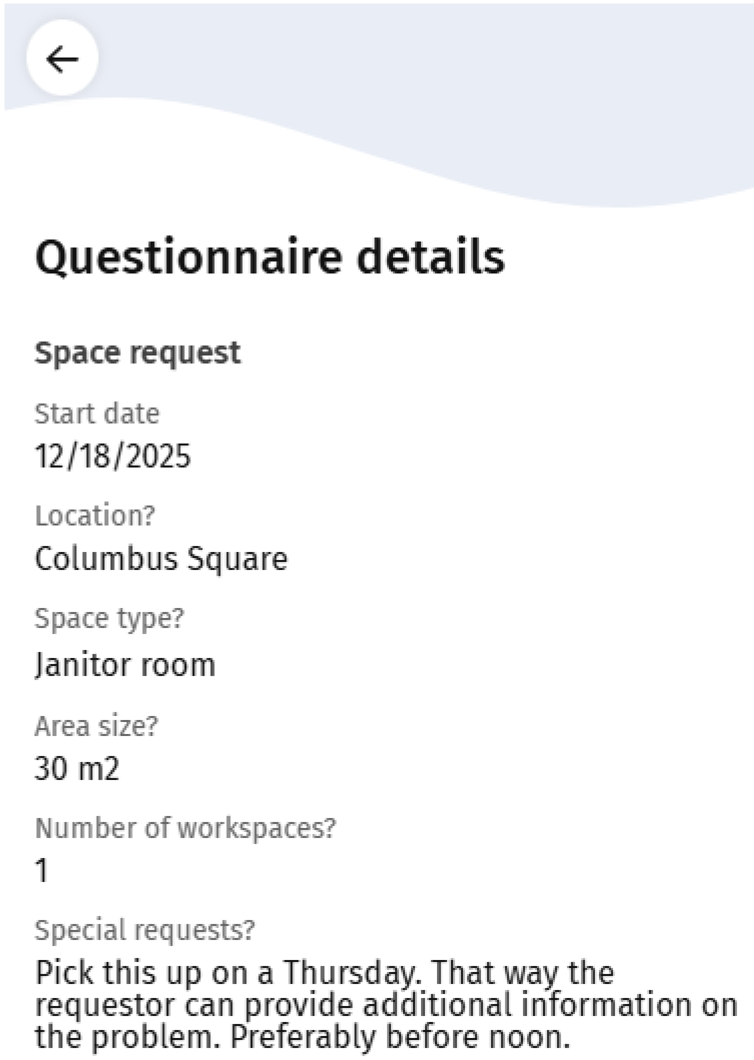
2. Select the **Parent order** block to view information from the original request on the **Summary** page.



You go to the Parent order details page, where you can find useful information from the original request.



3. If applicable, select the button at **Questionnaire details** to navigate to the linked questionnaire and answers.



4. After viewing the information, return to the **Summary** page to consult other blocks or to select the **Work** action.

Adding a suborder

While working (your work assignment is 'in progress'), you might find that additional work is required on an asset or space. In that case, you can add a suborder to the work assignment's main order, in which this additional work is defined. You can then assign this additional work assigned to yourself or to one of your team members, or leave the assigning to the back-office.

Procedure

1. In the **Work assignments** module, select the work assignment to which you want to add a suborder.

It does not matter what status the work assignment has, as long as it is not Assigned. Also, the work assignment should not be a team assignment.

2. At the top of the **Summary** page, select the plus icon to add a new suborder.

This button is only available if it is configured on your app.

3. On the **Add suborder details** page > **Standard order** field, select the standard order on which the suborder must be based.
4. If you already know that you can pick up this suborder yourself, tick the **Assign suborder?** option.

In the Assign to field, your name is now filled in (read-only).

If it is still unclear who is going to do the work, do not tick this field. When left unassigned, the back-office can assign the suborder later.

5. Edit or fill in the fields **Description**, **Property**, **Comment** and add an **Image** as required.
6. Select **Submit**.

   The suborder is sent to the back-office and added to the main order. If it is assigned to you, you will see it listed on the app upon refreshing your Work assignments start page. If it is unassigned, the back-office will take care of the subsequent assigning and processing.

Adding labor hours

The app automatically takes care of your labor hours registration, with each action you select. In general, the hours that were automatically added in the **Time spent** block will reflect the actual number of labor hours spent on the work. However, in some cases it might be necessary to add additional hours to the work assignment.

Example: You have to call in another team member to assist you on this work assignment and you want to add these additional labor hours.

Procedure

1. On the Overview page (or on the Summary page for PPM orders), select the Time spent block.

   The Labor hours details page is displayed, with the labor hours registered up to this point in time.

2. If you want to *add* labor hours, select the plus icon on the right.

   The Add labor hours details page is displayed.

3. On this page, fill in the fields for the new labor hours.

For example, if you want to add labor hours for an additional internal tradesperson, select that person in the Internal tradesperson field.

> If you want to add labor hours for an *external* co-worker, add this person's name via the **Enter external worker** button at the bottom. This name is subsequently displayed in the **Internal tradesperson** field on the **Edit labor hours details** page. Note that external co-workers are not stored as records in the Planon database, only the labor hours linked to their name.

Also fill in the Start- and End date-time, Trade, Hour type and any tariff data and / or a Comment. The external labor hours are registered under this person's name at the back-office.

4. Select Submit.

> If you add multiple **Labor hours** records to a work assignment, these hours should not overlap if you add them for the same engineer.

Editing (running) labor hours

In some cases you may want to edit the registered labor hours for a work assignment.

Examples:

- You forgot to select the **Travel** action to register your traveling time.
- You forgot to select the **Wait** action to register your time waiting for access or tools.

Procedure

1. On the Overview page (or on the Summary page for PPM orders), select the Time spent block.

   The Labor hours details page is displayed, with the labor hours registered up to this point in time.

2. On the Labor hours details page, select the icon (if multiple actions are available) or the 'edit' icon on the existing (running) labor hour record.
3. Optional: From the **Available options pop-up**, select **Edit labor hours**.
4. Edit the relevant data.

> With automatic labor hour registration (running labor hours), editing the labor hours to an earlier date-time than the original start date-time will also update the **Actual start date-time** field of the work assignment in the back-office.

5. Select Update.

   You will get a confirmation that the information is updated successfully.

Editing labor hours is only possible if the work assignment is not yet finalized.

Deleting labor hours

In some cases it might be necessary to delete the registered labor hours for a work assignment. In the **Work assignments** module, you can delete labor hours created by yourself on the device.

Procedure

1. On the Overview page (or on the Summary page for PPM orders), select the Time spent block.

   The Labor hours details page is displayed, with the labor hours registered up to this point in time.

2. On the Labor hours details page, click ••• icon (if multiple actions are enabled) or the delete icon (if only delete action enabled) on the existing (running) labor hour record you want to delete.
3. Optional: From the **Available options pop-up**, select **Delete labor hour**.
4. Tap Yes.

   You will get a confirmation that the labor hour is deleted successfully.

Deleting labor hours is only possible if the following criteria are met:

Finalized?	Labor hour added from device	Delete possible?
Yes	Yes	No
No	Yes	Yes
Yes	No	No
No	No	No

Working with PPM work assignments, maintenance activities and checklists

If you select a work assignment that is part of a *PPM order* (planned maintenance order), this order usually consists of various parts that have to be completed in a particular sequence:

- The actual PPM order may include one or more work assignments, each with one or more *maintenance activities*.

- Each maintenance activity may have *checklist items* linked that must be acknowledged while the maintenance activity is in progress.

Procedure

1. On the overview page, select the PPM work assignment you want to pick up.
2. View the data and select Accept.
3. If applicable, select Travel to allow for traveling time.
4. When ready to start work, select Work.
5. On the **Edit 'Work'** page make the necessary edits and select **Submit**.

   You are directed to the Summary page.

6. View the **General information** tab
7. Go to the **Activity** tab to see the maintenance activity/-ies for this assignment.
8. Select a maintenance activity and view the available information blocks.

When you select a specific information block, you are directed to the detailed information.

9. Before you start working on the maintenance activity, select the **Checklist** block / button to open and view the checklist.

> Before a maintenance activity is set to the **Work** status, you can only view the checklist items; after it is set to **Work** you can actually select a status for an item.

10. While working on the maintenance activity, go through the checklist and select a relevant status for each item:

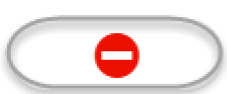
    Assessed with observation

    or **Done**

    Unable to assess

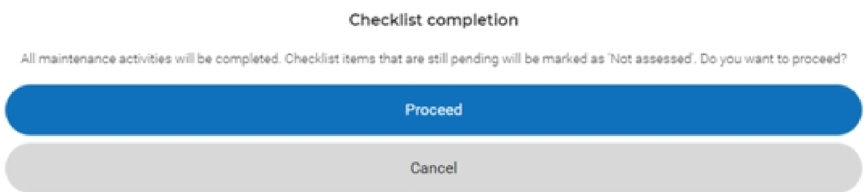
11. Enter a reason and / or comment per checklist item as required and select Submit.
12. Repeat steps 9-11 for any other maintenance activities.

13. Select the appropriate next action: **Back to activity** / **Complete checklist**.

The action button that is shown depends on how many maintenance activities are linked to the PPM order (one or multiple) and whether all these activities have already been completed or not.

14. When the maintenance activity is /maintenance activities are completed, select **Done**.

If not all checklist items are set to Done yet, the following message is displayed:



15. Click **Cancel** if you want to return to the activity.
16. Click **Proceed** if you want to complete the maintenance activity /-ies although some checklist items are not set to **Done**.

    You are directed to the Edit 'Done' page where you can enter relevant information on the completion of the work.

> An app setting applies to the completion of maintenance activities with unacknowledged *mandatory* checklist items. If this setting does not allow the completion of maintenance activities in such cases, you cannot proceed. If the setting *does* allow it, you can complete the maintenance activity. In that case, a second setting determines whether unacknowledged checklist items are set to **Done** or to **Not assessed** upon the completion of the *work assignment*. Which settings apply, depends on your configuration. Contact your Planon administrator in case of questions.

17. Select **Next**.
18. On the **Engineer's overview** page, check the details and select **Next**.
19. If applicable, fill in the **Sign-off** page and select **Submit**.

    The work assignment disappears from the overview and is returned to the back-office

Traveling to the location

You may want to record the time you are traveling to your customer. These hours will be sent to the back-office as part of the total time spent on the work assignment (labor hours).

> Before you start traveling, you can open your device's native navigation app, by clicking the **Get directions** button on the **Location** block. The Planon application will provide the latitude and longitude information of the property. However, if this data is not available and the navigation results depend solely on the address data of the property, the 'map'

application can only provide a reliable route if this address data is complete (address and zip code).

Use the following procedure to start the travel time registration:

Procedure

1. After you have accepted a work assignment, select the All button on the status bar.
2. Select Travel.

   An Edit […] screen is displayed.
3. In the Expected arrival date-time field, select the time you expect to be at your destination.
4. If necessary, edit the default value in the Action date-time field, which is the current date-time.

The date-time in this field is the start date-time for the travel time registration.

5. Select Submit.

   The travel time registration ends when you select the next action on the status bar.

Rejecting a work assignment

After you have viewed the work assignment overview, you might decide to reject a work assignment.

Procedure

1. On the overview screen, select the work assignment you want to reject.

   You navigate to the Edit 'reject' page.
2. View the details and edit them as required (select a different Action date-time for example).
3. Go to the Reason field and select an appropriate reason for rejecting the work assignment.
4. In the Comments field, enter a further explanation, if required.
5. Select Submit.

   A 'toast' notification at the top of your screen confirms that you have rejected the work. The work assignment is removed from your overview page and returned to the back-office. The back-office can view your updated status information in the Orders TSI: Orders > Communication logs tab.

Waiting for the customer

The time you have to wait at the customer's due to circumstances that are beyond your control will be recorded as labor hours. They can marked as waiting time in the communication logs that are sent to the back-office. Use the following procedure to include waiting hours in the labor hour registration:

Procedure

1. After you have started working on a work assignment, and you need to interrupt your work due to circumstances or occurrences that are the responsibility of the customer, select the All button on the status bar.
2. Select Wait.

   An Edit […] screen is displayed.
3. In the Action date-time field, select the start time of the waiting.
4. In the Reason field, select a reason.
5. If required, enter additional remarks of information in the Comments field.
6. Select Submit.

   The time registration for waiting ends when you select the next action on the status bar.

Pausing a work assignment

Usually, hours spent on lunch breaks or coffee breaks are not registered as labor hours. There might also be other activities or occurrences that you might want to exclude from the labor hour registration, such as an informal meeting or a change of priority. Use the following procedure to exclude these hours from the labor hour registration:

Procedure

1. After you have started working on a work assignment, and you need to take a break or interrupt your work for personal reasons, select the All button on the status bar.
2. Select Pause.

   An Edit […] screen is displayed.
3. In the Action date-time field, select the start time for your break.
4. In the Reason field, select a reason.
5. If required, enter additional remarks of information in the Comments field.
6. Select Submit.

   The pause ends when you select the next action on the status bar.

Discontinuing a work assignment

Circumstances can arise where you cannot proceed with a work assignment that is already in progress. In such cases, it might be necessary to return the work assignment to the back-office and stop your labor hour registration. This can either be a temporary or a permanent discontinuation of the work.

In either case, the work assignment is returned to the back-office, where it can be reassessed and reassigned to the appropriate person and the appropriate time. Use the following procedure to stop the labor hour registration and return the work assignment:

Procedure

1. If your work assignment is already in progress, but you must (temporarily) stop working on it, select the All button on the status bar.
2. Select Discontinue.

   An Edit […] screen is displayed.
3. In the Action date-time field, select the start time for stopping the work.
4. In the Reason field, select a reason.
5. If required, enter additional remarks of information in the Comments field.
6. Select Submit.
7. The Engineer's overview opens.
8. Check the data and select Submit.

   The work assignment is retracted from your device and returned to the back-office for reassigning. The labor hour registration is stopped.

Adding a temporary fix

Some repairs that you make are only temporary, because the problem cannot be solved permanently yet. Reasons for this may vary: you may not have the right spare parts or equipment; or the asset to be fixed is going to be replaced very soon and does not require a permanent fix. Cases like this can also have an impact on any SLAs that might exist for your customer. In such cases, you can select an action to notify the back-office that the current fix is not permanent. If required, the back-office will reassess the order and reassign it.

A **Temporary fix** action only applies if:
- the work assignment's related order is not a planned maintenance (PPM) order, and ...

- the work assignment is a *key* work assignment, recognizable by this label:

There are two actions available for a temporary fix:

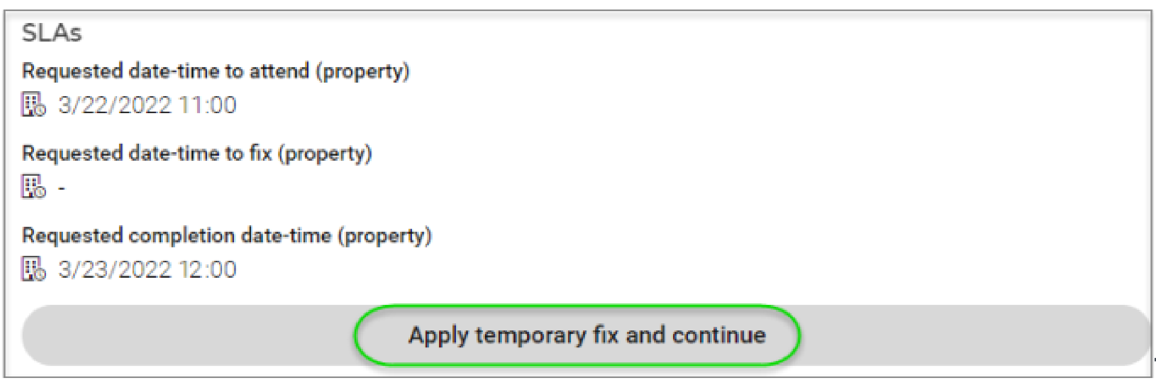
- **Apply temporary fix and continue** - this action on the SLA block allows you to apply a temporary fix without returning the work assignment to the back-office, allowing you to continue to work on a permanent fix. You will not sign off, because you intend to actually complete the work soon.
- **Temporary fix** - this action ends the work assignment and returns it to the back-office for reassessment (depending on the configuration the back-office status will be updated, for example to **On hold**). You are directed to the sign-off page.

Procedure 1 - 'Apply a temporary fix and continue'

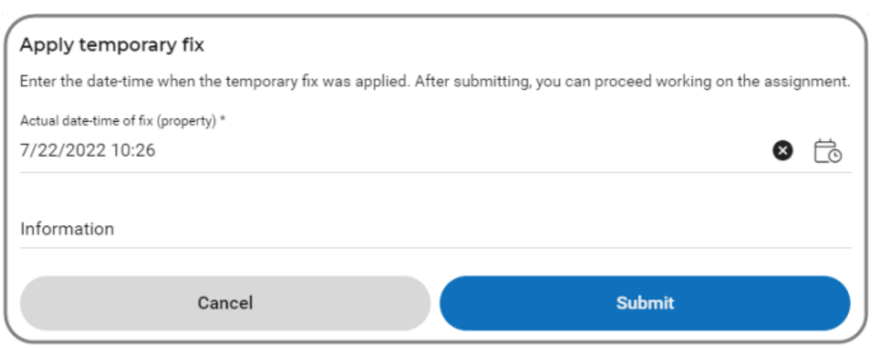
1. After you have started working on a work assignment, and decide that you want to apply a temporary fix without removing the work assignment from your device, navigate to the SLA block of the work assignment.

Be aware that after selecting **Apply temporary fix and continue**, you will no longer be able to **Discontinue** the work. If it turns out that you are unexpectedly unable to complete the permanent fix, you can only end the work by selecting the **Temporary fix** action.

a. Select the Apply temporary fix and continue button.



The Apply temporary fix screen is displayed.

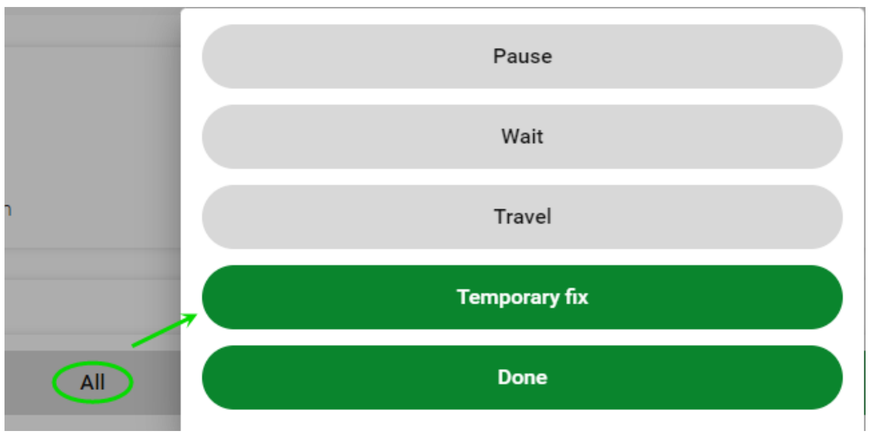


b. In the Actual date-time of fix field, select the date-time for this temporary fix.
c. If required, enter additional remarks of information in the Information field.
d. Select Submit.

The work assignment remains on your device and you can continue working on it, to provide a permanent fix. The back-office will be aware of this temporary fix, because there the work assignment field **Applied temporary fix and proceeded?** is set to **Yes**. Also, the SLA field **Actual time to fix** on the order will be timestamped with the actual date-time of the temporary fix, allowing the SLA to be met while you continue to work on the permanent fix.

Procedure 2 - 'Temporary fix' and end

2. If it is immediately clear that you cannot provide a permanent fix, you can apply a temporary fix and end the work assignment, by selecting All at the bottom of the screen and then select Temporary fix.



a. On the Edit […] screen, In the Action date-time field, select the start time for your temporary fix.
b. In the Reason field, select a reason for the temporary fix.
c. If required, enter additional remarks of information in the Comments field.
d. Select Next.

The **Engineer's overview** is displayed.

e. Check the data and select Next.

If configured on your app, the **Sign-off overview** for the customer is displayed. Refer to Ending a work assignment and customer sign-off for the next steps. The work assignment is removed from the list and sent to the back-office for reassessment. There, the **Actual date-time of fix** (TTF) field and the field for the SLA will be updated accordingly.

Reassigning work to another team member

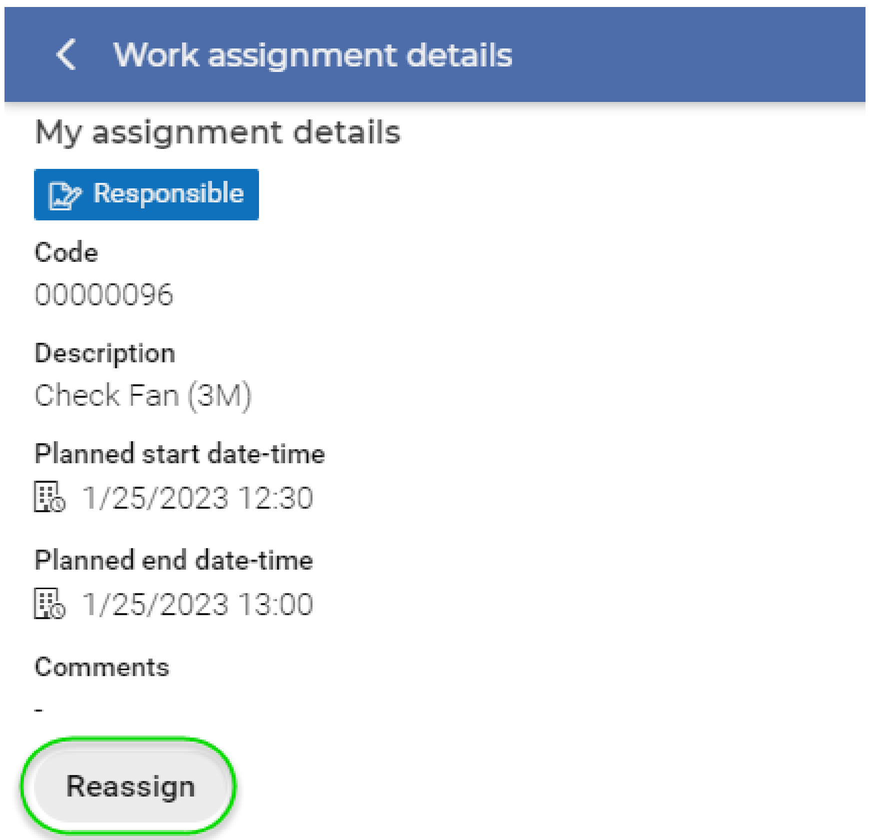
In some cases, you might not be able to continue with the assignment you are currently working on. Rather than returning the work to the back-office, it might be more convenient to assign it to one of your team members. Or you might want to reassign it to the team as a whole, on the principle of 'first come, first served' when they pick up the work. In both cases,you can use the following procedure.

> You Planon administrator can make the **Reassign** action available on the app.

Procedure

1. After you have decided to reassign a work assignment you have been working on, select the work assignment's Summary page.
2. Select the Work assignment block.

   You are directed to the Work assignment details page.
3. On the Work assignment details block (My assignment details), select the Reassign button.

   The Edit [Reassign] screen is displayed.
4. In the Action date-time field, select the start time for reassigning.
5. In the Internal tradesperson field, select the team (member) to whom you want to assign the work.
6. In the Reason field, select a reason.

7. If required, enter additional remarks of information in the Comments field.
8. Select Next.

   The Engineer's overview is displayed.

9. Proceed with the signing-off procedure as described in: Ending a work assignment and signing off.

Ending a work assignment and signing off

When you have completed a (key) work assignment and - if applicable - have completed the related maintenance activities and checklist items, you can select the **Done** action. Or, if you have applied a temporary fix for a non-PPM order and you want to return the work order to the back-office, select the **Temporary fix** action. Both actions will lead you to the **Engineer's overview** of the work assignment, which also includes relevant information about labor hours, materials, checklists, and so on.

Procedure

1. On the Summary page 's action bar, select the relevant action up to end the work assignment: All > Done or All > Temporary fix.

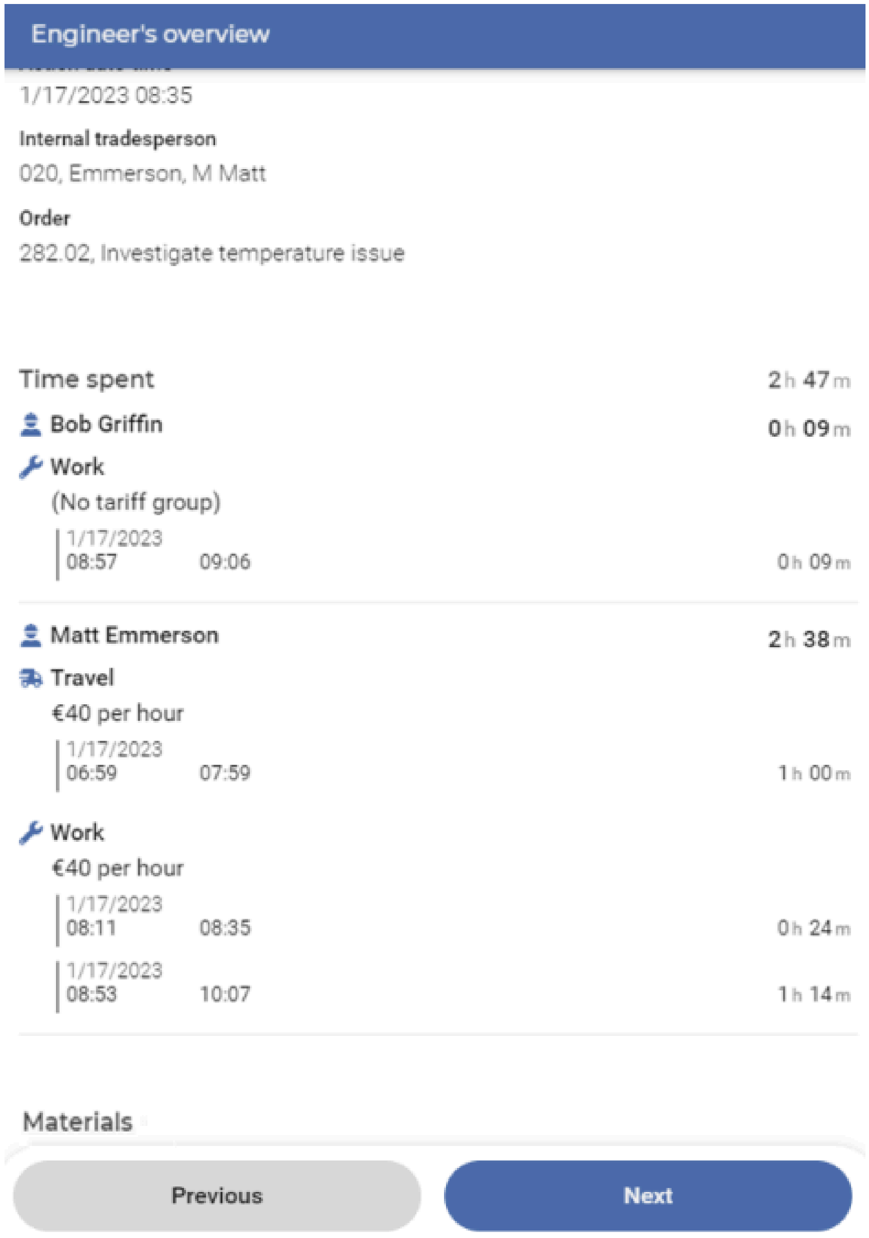
   An Edit 'Done' or Edit 'Temporary fix' screen is displayed.

2. In the Action date-time field, select the date-time for ending the work.
3. If applicable, enter a reason in the Reason field, or additional remarks / information in the Comments field.
4. If the work assignment is a key work assignment and the 'multiple work assignments' functionality is activated, select the appropriate option (Yes or No) in the All work completed? field.

> If you select **No**, the work assignment is returned 'uncompleted' to the back-office and set to the next applicable status (depending on your configuration this might be **On hold** for example). If you select **Yes**, proceed with the next step to complete.

5. If applicable, fill in the questionnaire.
6. Fill in other fields as required.
7. Select Next.

   The Engineer's overview is displayed.

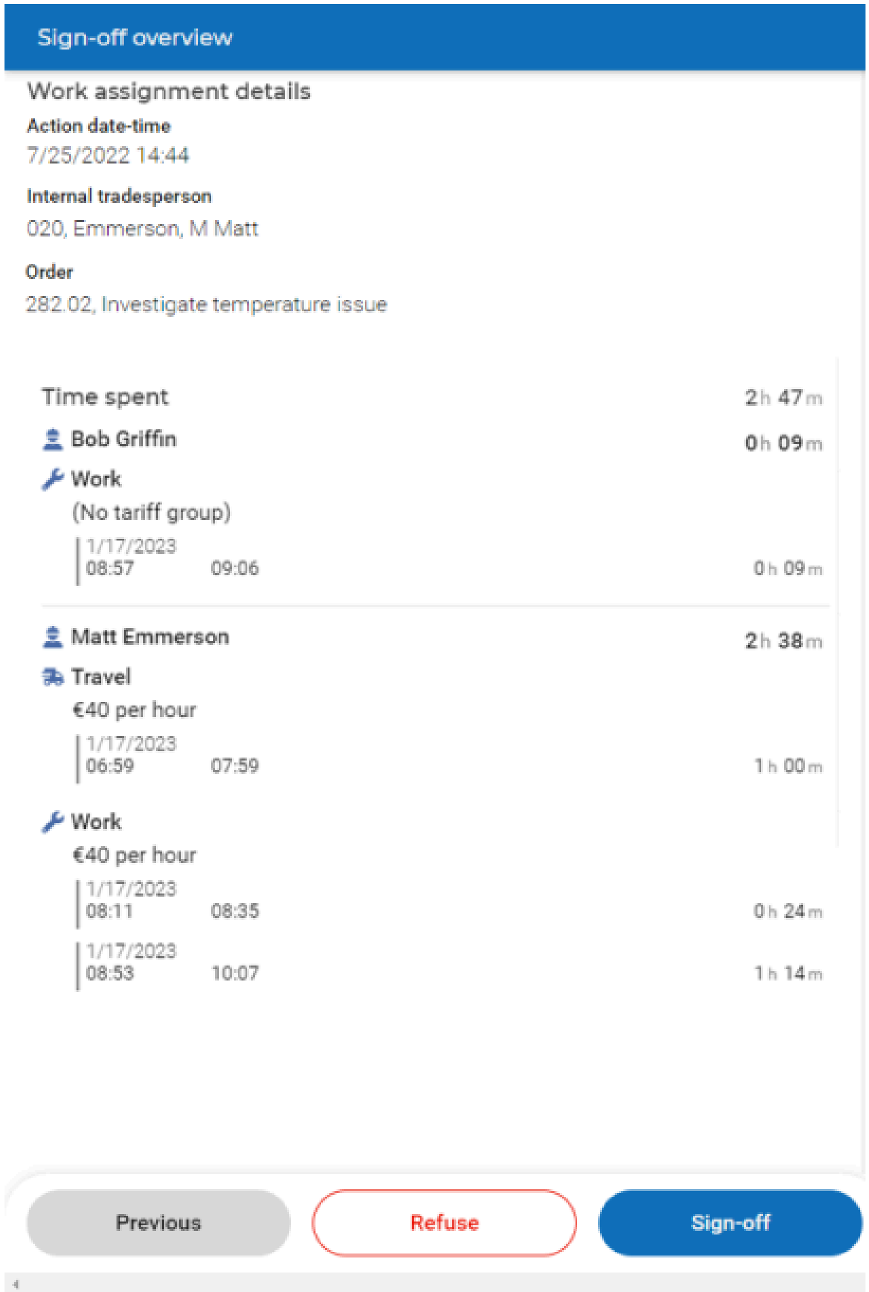


8. Check the data and select Next.

   The Engineer's sign-off page is displayed.

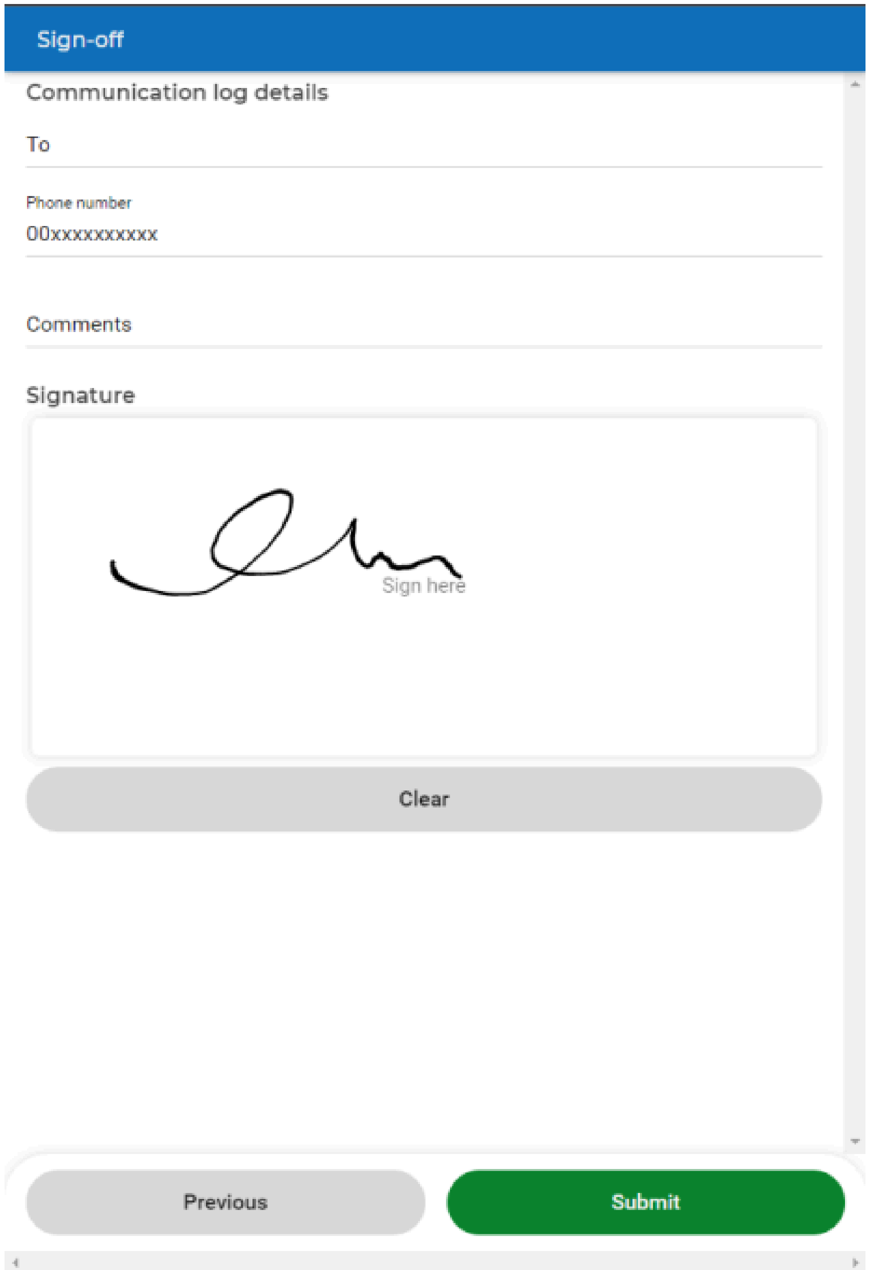
9. On the Signature pad, enter your own signature and select Next.

   If configured on your app, the Sign-off overview for the customer is now displayed.



10. After the customer has read the sign-off information, either select Sign-off, to ratify the work assignment with a customer's signature ...:

Fill in the Sign-off form and show it to the customer. Ask the customer to sign the form, before selecting Submit.



11. Or ...
12. … select Refuse if the customer is not agreeable with the work and/or the information shown.

Fill in the Refuse sign-off form with the customer and select Submit.

A confirmation is displayed that the work assignment's status is set to **Done**.

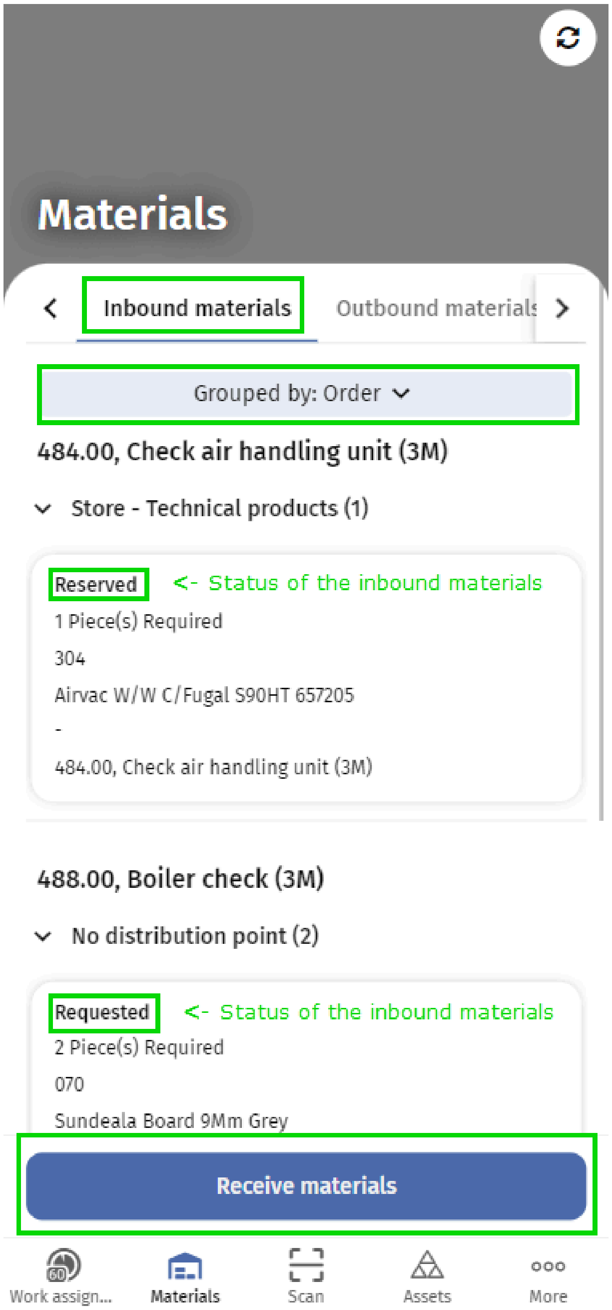
Planon app - Materials module

You can use the **Materials** module on the app to keep track of your requested materials and confirm their receipt once you have collected them from a store / distribution point.

The various tabs in **Materials** provide information about the status of requested materials and the materials available in the mobile store.

Inbound materials tab

The **Inbound materials** tab shows the materials that you have requested via requisition lines in the **Work assignments** module. You can use the **Grouped by** toggle at the top of the page to adjust the grouping of inbound materials by either order or status (**Requested**, **Reserved** etc.). Materials with status **Ready to pick up** can be registered as received by clicking the **Receive materials** button.

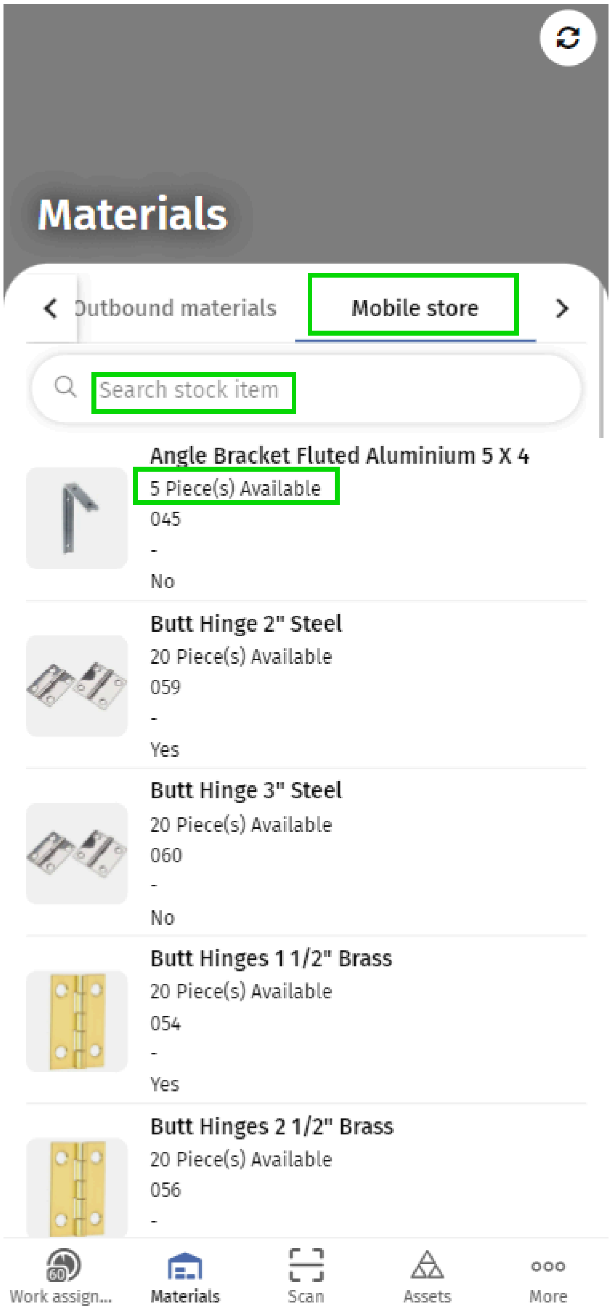


Outbound materials tab

The **Outbound materials** tab shows the requested materials that you have not used and which should be returned to their storage location. This also applies to materials you want to return to a self-managed store.

Mobile store tab

The **Mobile store** tab shows the materials available in your mobile store (for example a minivan) and their quantity. In the search bar you can search for a product by typing (part of the) the product code, description, brand or product item type.



Selecting a product will direct you to a page with the product details. If you add requisition lines for products from your mobile store in the **Work assignments** module, they will displayed on the **Used** tab on the **Material details** page. Here, the used quantity can be edited until you complete the work assignment. In the in the **Materials** module, these products will then be subtracted from the available stock in your mobile store.

Orders module in the PMFS solution

You can use the **Orders** module within the Planon app in the PMFS solution .

The Planon app is the 'shell' application that you can download from the relevant app store. It can hold various *licensed* app modules, such as: **Orders**, **Work assignments**, **Properties**, **Materials**, **Mobile observations**, the **Mobile Condition Assessor** and **Assets**.

Like all Planon app modules, the **Orders** app is configurable, through web definitions. This means that names, labels, etc. used in this user documentation may differ from what you see in your app.

For more information on adding and configuring licensed modules in the Planon app, see About Planon app - mobile configuration.

Working with the Orders module

This section describes the various functions available for the Planon **Orders** app module.

Searching orders in the Orders module

You can find orders using the search bar, by typing search terms or parts of search terms.

Procedure

1. Open the Planon app > Orders module.

As names of the app modules are configurable, Orders can have a different name in your app.

2. Type (part of) a search term in the search bar and confirm via you keypad.

Example: if you are looking for an order about fixing a boiler, enter (part of) the description: *boiler*, or (part of) the code: *132.01*.

> If you confirm the search in an *empty* search bar, you will get a list with all orders. Alternatively, you can use the (quick) filter to limit your search results.

3. Select the relevant order from the list of results, to view more details on the Summary page.

Using quick filters on the search bar and viewing order details

You can refine your queries in the search bar by using the available quick filter options.

Procedure

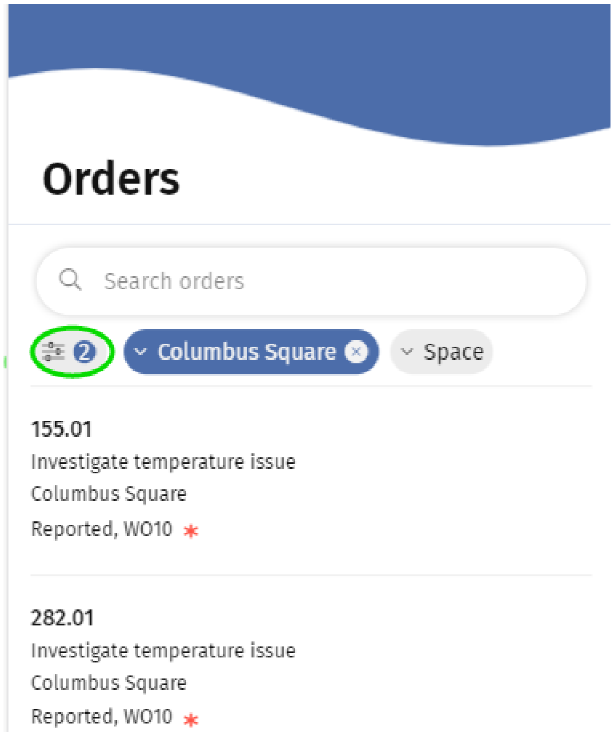
1. Open the Planon Live app > Orders module.

> As names of the app modules are configurable, **Orders** can have a different in your app.

2. You can activate a quick filter and apply it to your query by tapping the Select filters icon, selecting relevant criteria on the Filters page and tapping Apply.

Active quick filters are highlighted in a contrasting color. The Filter icon shows the number of active quick filters. Tap the drop-down symbol (v) on a quick filter to open the

list of filters. Deactivate the quick filter by tapping the cross. Scroll from left to right to see all quick filters.



3. From the list of results, select an order directly to view its details,

or if the list is too long ...

4. ... adjust your filter(s) and / or edit your search term and tap the search icon on your keyboard again.
5. Select an order to view its details.

   On the order's Summary page you can tap a block, for example Work assignment details to navigate to a page where you can view or edit specific details.

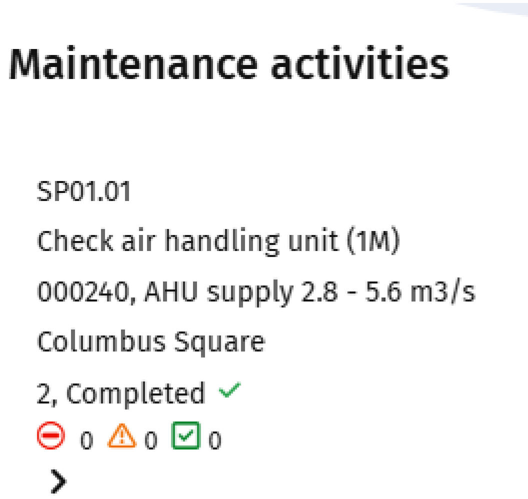
Viewing maintenance activities and checklists in the Orders module

When you select a maintenance order (PPM order) from the search list, you can also view its related maintenance activities and checklist items.

Procedure

1. In the **Orders** module, select the relevant maintenance order from the list, to view more details on the Summary page.
2. Select the **Maintenance activity details** block.

the Maintenance activities page is displayed, showing the activity details and - where applicable - checklist statuses (labelled Not assessed, Assessed with observation, Done and Unable to assess).



3. To view details about the status of any related checklist items, tap the **>** button on the block.

You navigate to the Checklist items page.

It displays the statuses of the checklist items across four tabs, depending on how they were assessed: **Not done**, **With observations**, **Done** and **Unable to assess**.

4. When you are done, you can navigate back to the search page by tapping the **<-** at the top of the page.

Configuration updates and data changes by the back-office

Planon uses a feature called 'mobile envelopes' to make sure that you timely receive any back-office updates.

Thanks to the mobile envelopes feature, you do not have to worry about data synchronization, nor about data loss when you work offline.

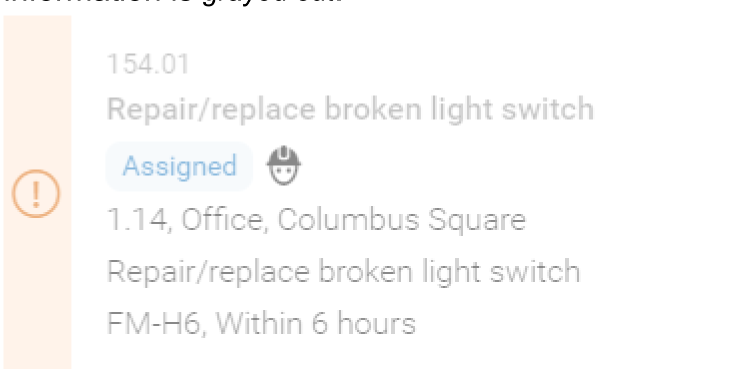
However, it might happen that the back-office makes configuration changes that impact the app or updates data of work assignments that have *already been opened on your device*. In that case, two scenarios can arise on the app:

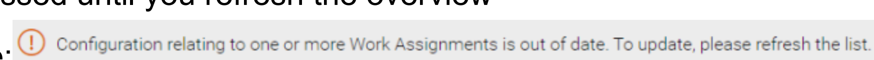
1. **Configuration changes**

   If the back-office makes changes to the *configuration* of the **Work assignments** app module, this will affect your work, since the currently displayed layout of the work assignment is now *out of date*. The type of back-office changes you should think of in this respect are:

   - changing a setting on the sub web definition
   - adding or deleting fields to / from an app page;
   - updating configured data in the web definition.

   In such cases, the envelopes of 'opened' work assignments will be blocked. On the overview page, these work assignments are marked with an orange indicator and the information is *grayed out*.

   The work assignment cannot be accessed until you refresh the overview page: 

2. **Data changes**

If the back-office updates the *data* of a work assignment (this also includes records of related business objects, such as the **Order**, **Order lines**, **Labor hours** etc.), this will affect the data on your mobile device. It depends on the type of data how urgent it is to refresh a page. The type of back-office changes you should think of in this respect are:

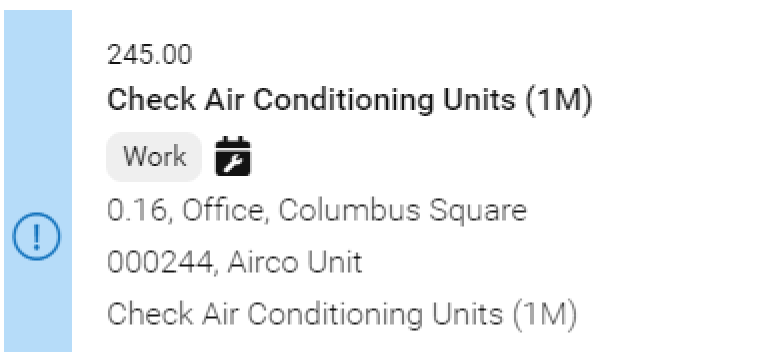
- adding / deleting / updating data in *low impact* fields such as **Description**, **Comment**, **Communication log** fields;
- adding / deleting / updating data in *high impact* fields, such as **Asset**, **Space**, **Property** or **Customer**.

See Overview of impactful back-office data changes for a detailed list of high and low impact changes.
The system will:

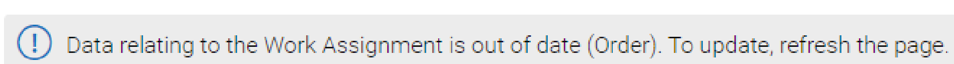
- update the changed record(s) instantly on your device (only for low impact changes);

If you are on a page where such a change is being processed, you will only see the update after you leave the page and return.

- show you a 'toast' message if you have opened the work assignment or are already actively working on it;
- show a blue indicator on the overview page that some data is outdated for that particular work assignment.



On the **Summary** page you are prompted to refresh the page, which you can do when convenient. You will not be blocked.



If you make changes on your device while the back-office is simultaneously changing the same data, your changes are given preference.

Overview of impactful back-office data changes

The following table lists actions and field changes that will prompt app users to *refresh* the data on their mobile device.

High impact actions / field changes

Back-office action	*Details*
Add work assignment	
Add labor hours	
Add / update order lines	
Add / update requisition lines	
Add issuing line	
Add / update 'Used' lines	
Add communication log	
Add checklist item	
Delete work assignment	
Delete labor hours	
Delete order lines	
Delete requisition lines	
Delete issuing line	
Delete 'Used' line	
Delete communication log	
Delete checklist item	
Update **Stock request**	
Update **Order** fields	Fields: **Asset**, **Customer**, **Floor**, **Requestor**, **Priority**, **Property**, **Space**, **Sign-off required?**, **EHS required?**, **Engineer sign-off required?**
Update **Work assignment** fields	Fields: **Status**, **Key work assignment?, Comment**
Update **Labor hour** fields	Fields: **Hour type**, **Start date-time**, **End date-time**, **Internal tradesperson**

High impact actions / field changes	
Update **Maintenance activity** fields	Field: **Status**
Update **Communication log** fields	Fields: **Comment**, **Document reference**, **Document secure**, **Image**, **URL**
Update **Issuing** status	New status is: **Completed** / **Received** and old status is **Reported**
Update **Issue return**	Status change to **Confirmed**
Low impact actions / field changes	
Back-office action	*Details*
Update **Order** fields	Fields: **Comment**, **Comments**, **Description**, **High priority?**, **Location description**, **Requested date-time to attend**, **Requested date-time to fix**, **Requested date-time to complete**
Update **Work assignment** fields	Fields: **Appointment booking?**, **Assigned hours**, **Comments**, **Effort**, **End date-time**, **Start date-time**, **System status**
Update **Order line** fields	Field: **Quantity**
Update **Labor hour** fields	Fields: **Start date-time**, **End date-time**, **Finalized?**
Update **Communication log** fields	Field: **Comments**
Update **Checklist items** fields	Field: **Comment**

Push notifications

Whenever new work is assigned to you or to your team, you will receive a push notification on the app. The same will happen when important changes are made to existing work assignments on your device.

- Selecting a push notification about new assigned work will open the app and after log-in, open work assignment in the **Work assignments** module.
- Selecting a push notification about revoked work by the back-office will open the app and once logged-in, remove the revoked work assignment from the app (refresh the list).
- Selecting push notifications about updated comments (new communication logs) will open the app and once logged-in, direct you to the summary page of the corresponding work assignment.

The following overview lists the push notifications you might receive and what action is required (if any):

Subject	Push notification	Follow-up
Assigning individual work	Work assignment '{0:OrderNumber}, {1:OrderDescription}' is assigned to you.	Select the push notification to refresh your screen and to display the work assignment. Accept the work assignment if it suits your schedule.
Assigning team work	Work assignment '{0:OrderNumber}, {1:OrderDescription}' is assigned to your team.	Select the push notification to refresh your screen and to display the work assignment. Accept the work assignment if it suits your schedule.
Assigning team work	Another team member has already accepted this work assignment: {0:OrderNumber}, {1:OrderDescription}.	Select the push notification to refresh your screen and remove the work assignment from your device.
Updated comment on work assignment	A comment was added to this order: {0:OrderNumber}, {1:OrderDescription}.	Select the push notification to refresh your screen and display the updated **Comments** block of the work assignment.
Revoking work	This work assignment was revoked by the back office: {0:OrderNumber}, {1:OrderDescription}.	Select the push notification to refresh your screen and to remove the revoked work assignment from your device.

Subject	Push notification	Follow-up
Revoking team work	This team work assignment was revoked by the back office: {0:OrderNumber}, {1:OrderDescription}.	Refresh you screen to remove the work assignment from your device.

Index