

Planon Live - PMFS app

Planon Software Suite

Version: L105



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About this Document

Intended Audience

This document is intended for Planon Software Suite users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

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

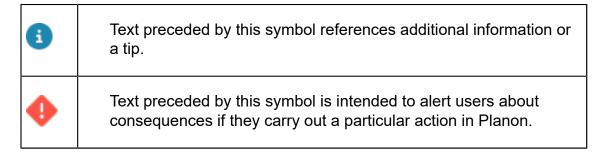


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About using PMFS Live app - Work assignments

In the **PMFS Live app > Work assignments** module, you as field engineer / technician can find the work assignments that have been assigned to you or to your team. The app's technology and features will ensure that the back-office gets updated correctly, even if you are working at remote locations.



Like all Planon Live apps modules, **PMFS Live app > 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.

Installing the app

With the correct license, the **Work assignments** app module is available for the **Planon Live** app, the 'shell' application that you can download from the relevant app store. You can use **Work assignments** alongside various other *licensed* app modules that are available under the following labels: **Planon Workplace app**, **Mobile Condition Assessor app** and **Assets**.

App features:

- fast and intuitive maintenance job handling,
- 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.
- For more information on adding and configuring licensed app modules in the Planon Live app, see About Planon Live App Configuration.

Downloading and logging in

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

Planon Live is the application in which the various PMFS Live app modules are running.



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



Good to know:

If your organization is migrating to the new improved version of this application, which is recommended, you can download the **Planon** app from the store.





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 Live / **Planon** on your mobile device.

Downloading and logging in

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.



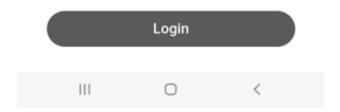


Login

Enter the company URL manually or use the scanner to scan a QR-code containing the URL

Company URL

https://





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).

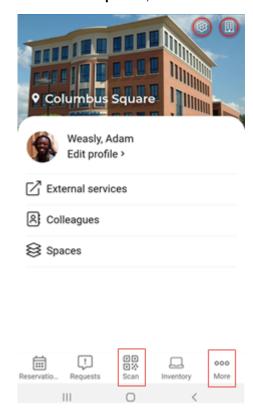
The app opens and is ready for use. The PMFS Live app content available to you depends on the specific configuration that has been applied to the app.

Downloading and logging in

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Generic features and settings

In addition to the functional modules, the Planon Live 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:

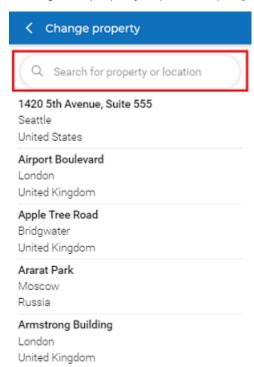
- If the scanned space is a reservation unit, the **Reservations** module is opened. To create reservation, refer to .
- If the scanned space is not a reservation unit, the Spaces module is opened. see also.



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

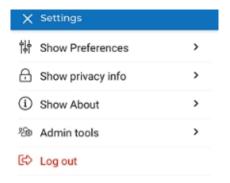
To change the property, tap the **Property** icon at the top-right corner of the screen.



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 Live app, tap the **Settings** icon at the top-right corner of the screen.



The options listed in the settings menu are:

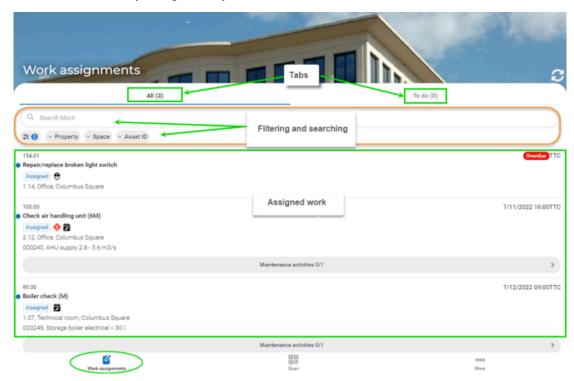
- Show preferences: At Display style, select either Tablet or Mobile. At Dark mode, switch the Dark theme on or off.
- Show privacy info:
 - Privacy statement: If you want to view the applicable privacy statement, tap the link in the Privacy menu, to open the link in your default browser. This is only 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.
 - Show workspace location?: if you want to hide your current location (based on your reservation data) from the floor plan and from the Office attendance block on the app, switch this setting off. You will get a confirmation that your privacy settings are updated.
- If the setting **Show workspace location?** is enabled, the text **Hidden by user** is displayed on the **Attendance** and **Availability** blocks.
 - Show about: Displays the URL used for logging in, the related Planon version and Store version.
 - 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 Live 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 *Mobile configuration Planon Live app* 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.



- 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 Live app.
 - Because the modules of the Planon Live app are configurable, any examples given may deviate from what is displayed on your app. For more information on App configuration, see About Planon Live - App Configuration.

Work assignments overview

After you have logged on to the Planon Live app you can select the **Work assignments** module. When you open the module you will see an overview page that contains the work that is currently assigned to you.



Tabs

The screen consists of two tabs:

All (...) - select this view to display all tasks assigned to you
personally, or as a team member. The blue dot in front of the
description means that this work assignment has not been opened by
you yet.



You cannot work offline on an unopened work assignment. Once it has been opened and the blue dot is gone, you can.

• To do (...) - select this view to display all tasks that have already been accepted and in progress. This page groups the work in a specific order: the work that is in progress on your device is shown at the top, followed by the accepted work. Within the groups, sorting is based on date-time / high priority, type and so on.

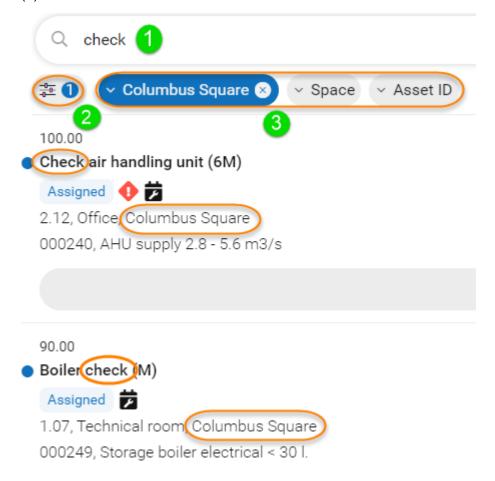
Search block and filters

14 Work assignments overview

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) and the quick filter is on *property* = 'Columbus Square' (3).



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.

Work assignments overview 15

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 |
|----------------------|------------------------|--|
| ₽ Responsible | 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. |
| Ö | 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. |
| Ö | 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. |

16 Icons and labels

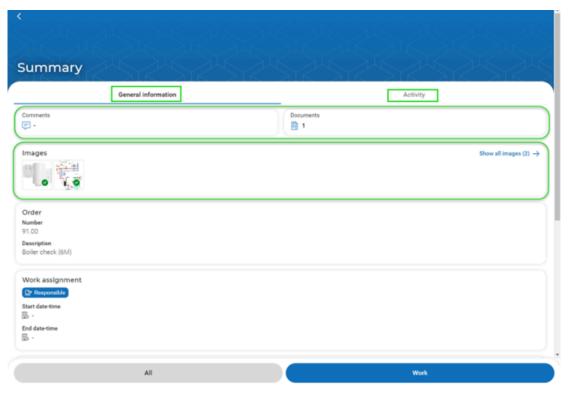
| Icon / Iabel | Description | Additional info |
|-----------------|--|---|
| Assigned | These labels represent the work assignment's <i>status</i> . | When you select an action for |
| Accepted | | the work assignment, the status label is updated accordingly. The Team label is only shown until you, 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. |
| Pause | | |
| Travel | | |
| Wait | | |
| Work | | |
| Team | | |
| 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 |
| TTA | Time to attend | also indicates which SLA (TTR/ TTA//TTF/TTC) is linked to the |
| TTF | , | displayed (overdue) date-time. |
| TTC | Time to complete | |

Icons and labels

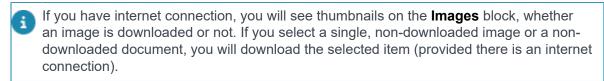
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Summary page

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 on the selected item. The following example displays the **Summary** page of a PPM work assignment, with information on two tabs, **General information** and **Activity**.



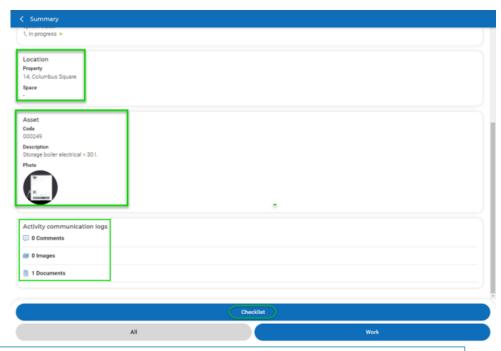
• If the work assignment is part of a 'regular' work order, the work assignment summary includes the following blocks: Comments, Documents, Images, Order, Work assignment, Location, Asset, SLAs, Time spent (Work, Travel and Wait hours), Materials.



• If the work assignment summary is part of a PPM order, the summary layout consists of two tabs:

18 Summary page

- General information tab displaying the work assignment information blocks such as Order, Comments, Documents, Images, Work assignment, Location, Time spent (Work, Travel and Wait hours), Materials.
- Activity / Activities tab displaying the Maintenance activity /(-ies) information, detailed Location and Asset information and information on maintenance activity related Comments, Documents and Images and (a button to navigate 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.

Summary page 19

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

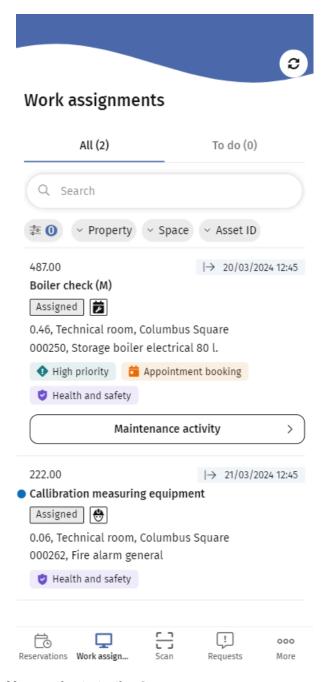
By selecting a specific block or an image you'll navigate to a summary with specific details, for example about the linked assets, materials, documents, labor hours and so on.

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.

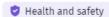
2. View the work assignment details.

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.

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- 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 this order.

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

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

6. If you selected **Continue** 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. If Health & Safety measures apply, you must first navigate several pages displaying any applicable Permits, Work-related activity types, Hazards, Method statements, Risk assessments. Read the information carefully before selecting Next to go to the next page. As a final step, you may need to fill in a Questionnaire before you can start working.

Work-related questionnaires may also be displayed at other stages of the work, for example if you select an action such as **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.

A confirmation message is displayed if you are allowed to start working. On the **Health & safety summary**, confirm that you understand and comply with all safety guidelines, by marking the check box.

- 7. Next, select Submit.
- 8. If you do not start working immediately, select All.
- 9. Select an relevant action: Travel, Wait.
- A

the **Discontinue** action will stop the work assignment and remove it from your device!



- 10. If you want to start working, select Work.
- 11. Add any relevant edits and/or enter a comment on the subsequent Edit 'Work' page.
- 12. Select Submit.

A notification at the top of your screen confirms that the work assignment is moved to the selected status and you are redirected to the Summary page.

Adding 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.

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 labelled as Tradesperson's comments).

Adding / uploading 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.

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Adding / uploading an image

Procedure

- 1. On the Summary page, select the Images block.
- 2. Select the plus icon on the right.
- 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
 - 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.

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

Adding 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

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.
- 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.

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 <u>cannot</u> see these personal notes. If you want to share information with them, use the **Comments** block at the top of your screen.

Procedure

 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.
- 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

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 an asset or change the existing asset information. It is also possible to update the asset when you are temporarily offline.



The Add / Change option is only available if the related order is <u>not</u> a planned maintenance (PPM) order. Sometimes, you might also want to check that you are working on the correct asset. In that case, the **Confirm asset** option is available for both **Orders** and **Maintenance activities**.

Procedure

- 1. On the Summary page, select the Assets block.
- If there is no asset linked, select the plus icon on the right to add an asset.
- 3. On the details page, select the relevant asset from the list, or ...
- 4. ... if you cannot find it in the list, enter (part of a) search term in the Search field and confirm with Enter.
- 5. Select the relevant asset from the search results.



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

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



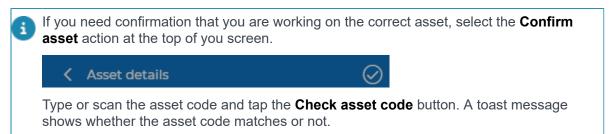
You can also enter the asset code / asset tag by selecting the Enter manually button at the bottom of the screen. Fill in the asset code / asset tag and tap Submit.

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.

If you want to edit the asset information you can select **Change asset** and update the data as required.



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

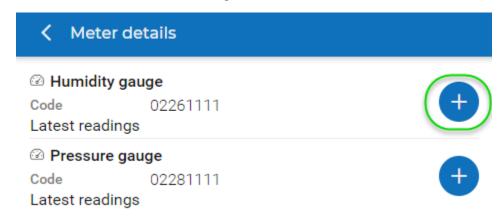
- 1. On the Summary page, scroll towards the Meters block.
- 2. If there is only 1 meter linked to the asset, select the Add meter reading button (plus sign) to start adding the meter reading directly,
- 3. or ... if there are multiple meters linked ...

26 Adding meter readings

| 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).
- 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 backoffice.

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

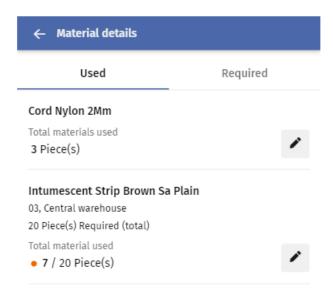
The back-office can register any materials that you may need for a job in advance. These are *planned* materials. It is possible to edit the used quantity of these material(s). You will see them listed on the **Materials** block when you start a job.

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*.



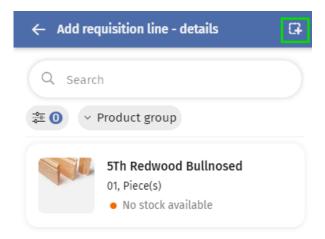
The product catalog is only available if you have an internet connection.

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

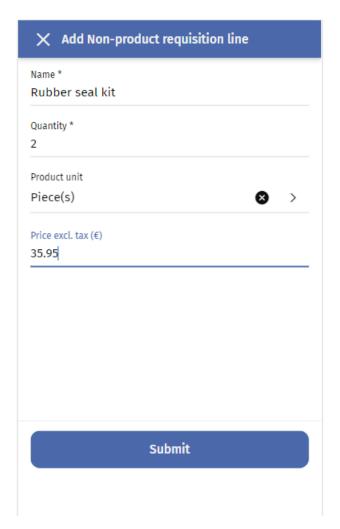
requested materials in the **Materials** module, on the **Inbound** tab. When the materials are ready to be picked up, you can confirm the receipt in this module, by selecting the **Receive materials** button. From that point, the materials will be listed on the **Used** tab of the **Materials** block 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 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 used materials via an order line. This order line is displayed on the **Used** tab of the **Materials** block in the **Work assignments** module.

Adding and editing used materials via an order line

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.



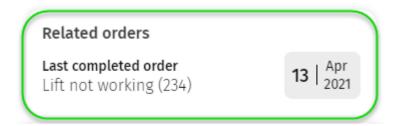
Any materials that were already added to the order by the back-office, the so-called *planned materials*, are listed in the **Used** section. You can edit them by clicking the **Edit** (pencil) icon.

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.



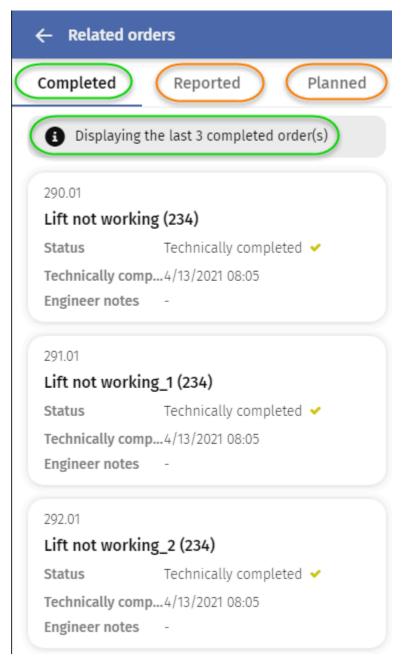
32 Viewing related orders

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.

Viewing related orders 33



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

Adding a suborder

While working (your work assignment is 'in progress'), you might find that additional work is required on the asset or space. In that case, you can immediately add a suborder to the work assignment's main order, in which this additional work is described. You can

34 Adding a suborder

then have this additional work assigned to yourself, or leave the assigning to the back-office.

Procedure

1. On the PMFS Live app, select the work assignment, for which you want to add a suborder.

The work assignment must have the status 'Work'.

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

Adding labor hours 35

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 coworkers 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 backoffice.

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 labor hours

In some cases it might be necessary to edit the registered labor hours for a work assignment. In the PMFS Live app, you can edit the labor hours.

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, click the icon (if multiple actions are enabled) or the edit icon (if only edit action enabled) on the existing (running) labor hour record you want to edit.
- 3. Optional: From the **Available options pop-up**, select **Edit labor hours**.
- 4. Edit the relevant data.
- Select Update.

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

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

36 Editing labor hours

Finalized? Edit possible?

Yes No No Yes

Deleting labor hours

In some cases it might be necessary to delete the registered labor hours for a work assignment. In the PMFS Live app , 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
- 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:

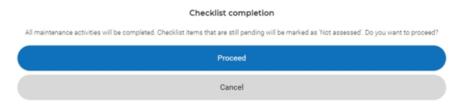
Or Done Unable to assess

- 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 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).

Traveling to the location 39

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).
- 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

40 Waiting for the customer

communication logs that are sent to the back-office. Use the following procedure to include waiting hours in the labor hour registration:

Procedure

- 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.
- 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

- 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.
- 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

- 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 <u>not</u> 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:

42 Adding 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.

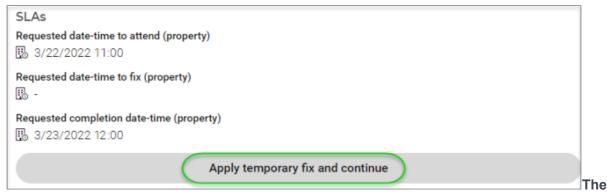
Procedure 1 - 'Apply a temporary fix and continue'

 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.

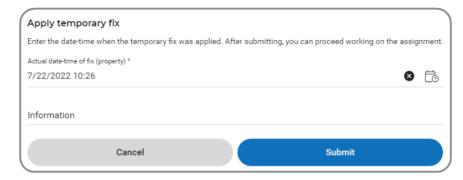


Be aware that after selecting **Apply temporary fix and continue**, you will no longer be able to **Discontinue** the work. If it turns out that you are unexpectedly unable to complete the permanent fix, you can only end the work by selecting the **Temporary fix** action.

a. Select the Apply temporary fix and continue button.



Apply temporary fix screen is displayed.



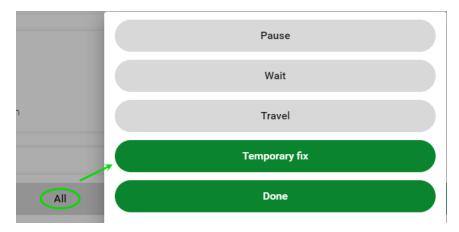
- b. In the Actual date-time of fix field, select the date-time for this temporary fix.
- c. If required, enter additional remarks of information in the Information field.
- d. Select Submit.

Adding a temporary fix 43

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.

8

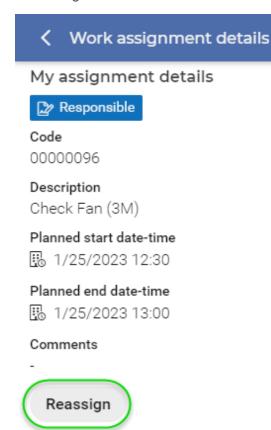
You Planon administrator can make the **Reassign** action available on the app.

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

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

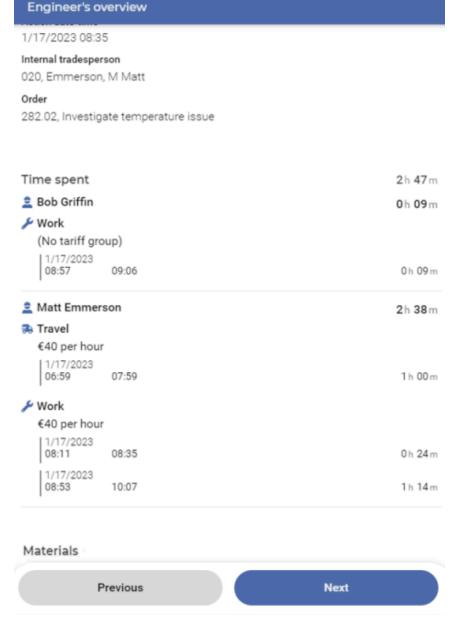
An Edit 'Done' or Edit 'Temporary fix' screen is displayed.

- 2. In the Action date-time field, select the date-time for ending the work.
- 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 <u>and</u> the 'multiple work assignments' functionality is activated, select the appropriate option (Yes or No) in the All work completed? field.
- a

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.

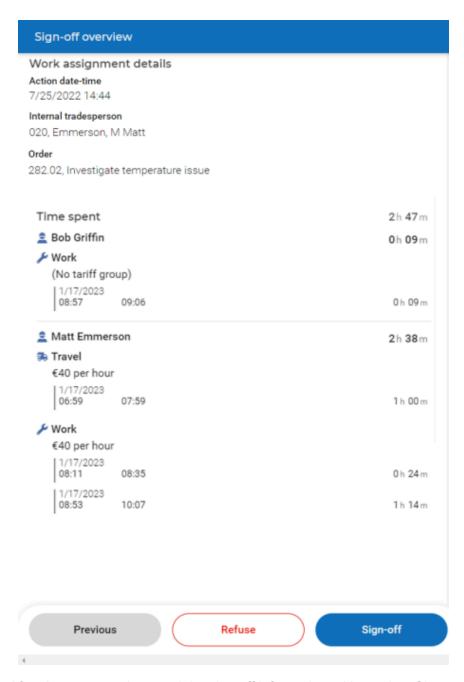


8. Check the data and select Next.

The Engineer's sign-off page is displayed.

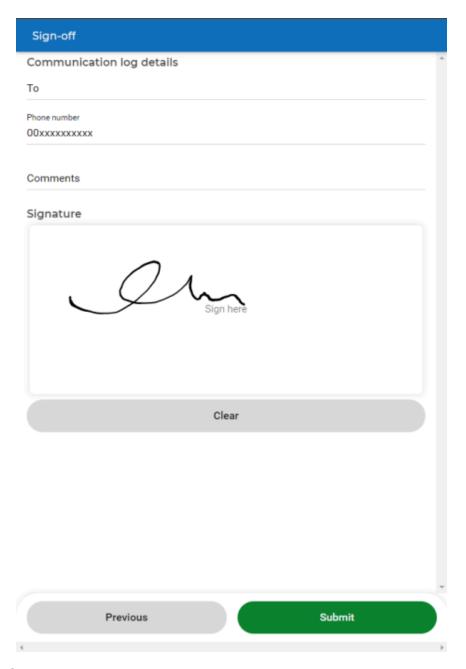
9. On the Signature pad, enter your own signature and select Next.

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.

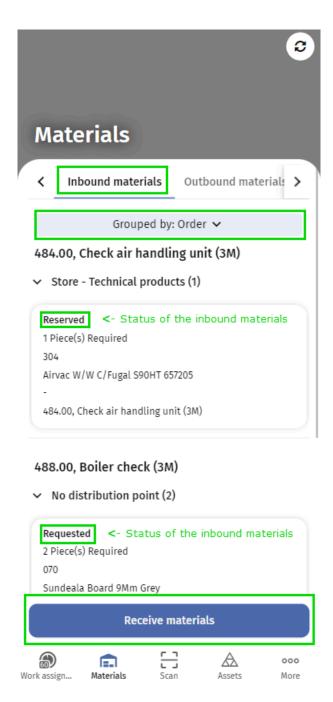
Using the Materials module in the PMFS Live app

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.

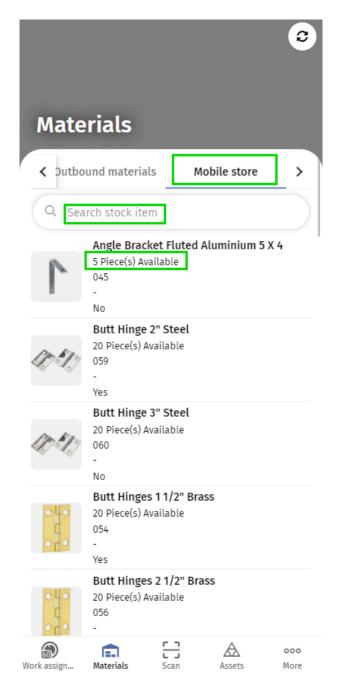


Outbound materials tab

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.

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.

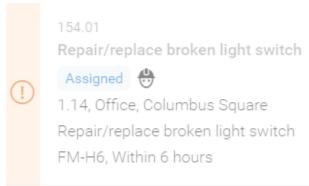
However, it might happen that the back-office makes configuration changes that impact the app or updates data of work assignments that have *already been opened on your device*. In that case, two scenarios can arise on the app:

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: Configuration relating to one or more Work Assignments is out of date. To update, please refresh the list.

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.

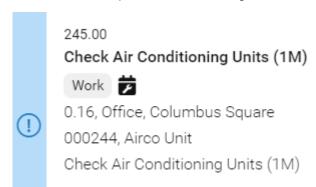
See Overview of impactful back-office data changes for a detailed list of high and low impact changes. The system will:

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

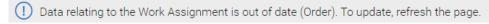


If you are on a page where such a change is being processed, you will only see the update after you leave the page and return.

- 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?

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 login, 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 assignmen | 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. | | |

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| 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. |

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