



Permits

Planon Software Suite

Version: L105

© 1997 - 2024 Planon. All rights reserved.

Planon and the Planon logo are registered trademarks of Planon Software Development B.V. or its affiliates. All other product and company names mentioned herein are trademarks or registered trademarks of their respective companies. Planon Software Development B.V., its affiliates and/or licensors own the copyright to all Planon software and its associated data files and user manuals.

Although every effort has been made to ensure this document and the Planon software are accurate, complete and up to date at the time of writing, Planon Software Development B.V. does not accept liability for the consequences of any misinterpretations, errors or omissions.

A customer is authorized to use the Planon software and its associated data files and user manuals within the terms and conditions of the license agreement between customer and the respective legal Planon entity as soon as the respective Planon entity has received due payment for the software license.

Planon Software Development B.V. strictly prohibits the copying of its software, data files, user manuals and training material. However, customers are authorized to make a back-up copy of the original CD-ROMs supplied, which can then be used in the event of data loss or corruption.

No part of this document may be reproduced in any form for any purpose (including photocopying, copying onto microfilm, or storing in any medium by electronic means) without the prior written permission of Planon Software Development B.V. No copies of this document may be published, distributed, or made available to third parties, whether by paper, electronic or other means without Planon Software Development B.V.'s prior written permission.

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 Permits.....	5
Concepts.....	6
Features in Permits.....	6
Permits.....	6
Roles and responsibilities related to permits.....	6
Permit types.....	7
Permit scopes.....	7
Properties.....	8
Filters.....	8
Permits creation.....	8
Status and status transitions.....	8
Work assignments and permits.....	8
Working with permits.....	10
Adding permit types.....	10
Adding permit scopes.....	10
Adding permits manually.....	11
Creating a standard request with linked permit types.....	11
Approving permits and assigning work.....	12
Assigning work assignments with permits.....	12
Permits - Field descriptions.....	14
Permit type fields.....	14
Permit scope fields.....	14
Order groups fields.....	14
Permits fields.....	15
Index.....	16

About Permits

The **Permits** TSI can be used to make sure that front-line workers can carry out their maintenance work safely and efficiently with all the required permissions. The solution supports procedures to request, review, authorize and document any permits that might be needed to carry out work orders or maintenance orders. The main goal is to make these tasks free of conflicting health and safety (H&S) issues and let procedures run safely and smoothly.

Health & safety officers are the primary users of the **Permits** TSI, in their responsibility for a healthy and safe working environment. They can create and approve the necessary permits for front-line workers and support the back-office with an automated process to link permits to orders.

Back-office staff can check the nature of the work, and create work orders or maintenance orders with the correct permit(s), before they assign the work to tradespeople / field engineers.

In a more general context, the back-office can also issue permits that are not directly related to any work, for example *access permits* for visitors. For that purpose they can use a standard request with a linked access permit type.

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Features in Permits

The solution includes the following features.

- Configurable **permit scopes** for the automatic creation of permits upon adding a work order or planned maintenance order (PPM order)
- Possibility to define various **permit types**
- Built-in **approval process**
- Display of job-related permits in the Planon AppSuite app
- Possibility to create permits that have no relation with an order, for example access permits for visitors

Permits

In the **Permits** TSI, you can create permits-to-work for a specific work order / PPM order. You can also have permits created automatically for work orders / PPM orders. As a third option, you can create an incidental permit that is not related to any order. For example, a visitor needing an access permit.

On the **Permits** selection level, you can add and edit permits.

The permits displayed in this selection level are based on the selections made in the **Permit type**, **Properties** and **Filters** selection levels.

On the **Permits** selection level, you can link orders to permits. The back-office can also link permits to orders in the **Work Orders** TSI. Permits are only valid for a certain time period and should be approved before assigning an order with a linked permit to a tradesperson / field engineer.

You can also reuse permits by linking them manually to existing orders.

You can link / upload health & safety documents with detailed information to a permit, at the Permit details > Communication logs - permits selection step.

Roles and responsibilities related to permits

With regard to permits, there are various roles, fulfilled by different people, each with their own responsibilities.

- **Health & safety officers** are responsible for configuring the permit-related data and approving / rejecting requested permits before further processing.
- **Back-office** staff are responsible for creating, planning, and assigning orders with applicable and approved permits.
- **Field engineers** are responsible for checking and acknowledging the permits that are attached to their assigned jobs, as part of adhering to health & safety guidelines.

Permit types

Health & safety officers can define different types of permits in the **Permits** TSI. This method of organizing permits by type enables them to manage very precisely which permits should be created for which situation.

These are some examples of permit types:

- Access permits
- Working at heights
- Working with dangerous substances

Each permit type can be linked to one or more permit scopes. These scopes determine the situations in which permits must be created automatically for a specific order. Optionally, you can link documents such as guidelines for accepting or rejecting the permits, or a template document that needs to be added before approving the permit. These documents can be linked / uploaded at the Permit scopes > Communication logs - permit types selection step.

Permit scopes

As a Health & Safety officer, you can link one or more permit scopes to a permit type. These scopes determine the situations in which a permit is actually required and needs to be generated upon creating an order. When defining a permit scope you must enter either a *property* for which specific permits are required and/or fill in an *order group*, *space*, *asset*.

Once you have defined a permit scope, permits of the linked type are automatically created when the back-office adds work orders or PPM orders for the property, order group, space or asset specified in the scope.

For example, an access permit is always required for server room 1.12 in building X.

Permit type - *Access permit*

Permit scope - *Server room access - Building X*, with linked **Property X** and **Space 1.12**.

Other examples:

- Access permits for a property or space

- Hot/cold work permits for an order group
- High voltage work permits for assets like main power units

Properties

The **Properties** selection level only displays the properties that are linked to a permit. You can use this level to filter out the permits that are linked to the selected property/-ies. For more information, see [Properties and property details](#)

Filters

From the **Filters** selection level, you can filter out permits, based on **Order groups**, **Spaces**, or **Assets**.

If you select the filter **Spaces** step after selecting one or more properties on the **Properties** selection level, then only the spaces related to the selected property/-ies are shown.

If you select the filter **Assets** step after selecting one or more properties on the **Properties** selection level, then only the assets related to the selected property/-ies are shown.

Permits creation

These are the methods to create permits for work orders / PPM orders.

- Manually: See [Adding permits manually](#) for more information.
- Through permit scopes (automated): See [Adding permit scopes](#) for more information.
- Through a standard request: This method is for permits that do not have any work linked. For example access permits for a visitor. See [Creating a standard request with linked permit types](#) for more information.

Status and status transitions

A newly created permit always has the **Requested** status. After it is verified by the H&S officer, the permit's status changes either to **Approved** or **Rejected**. Approved and rejected permits can be reset to the **Requested** status or be **Canceled** at any point in the workflow.

Work assignments and permits

Permits are automatically validated when planning a work assignment. A warning is shown if the back-office plans a work assignment with an invalid permit. An error message appears if you set a work assignment with an invalid permit to the status Assigned, Accepted or Work. All permits related to the order of the work assignment must be approved and the related permits must also be within the planned start date and time and planned end date of the order. You can proceed or cancel as required.

Working with permits

This section describes the various functions available.

Adding permit types

You can add permit types to organize your permits more efficiently. The permit types also help you find the relevant permit more quickly. See [Permit types](#).

Procedure

1. In the Permits TSI, go to the Permit types selection level.
2. On the action panel, click Add.
3. On the data panel, enter the required information.

For information on the field descriptions, see [Permit type fields](#)

4. Click Save.

You can proceed by adding the relevant permit scopes or permits. See [Adding permit scopes](#) or [Adding permits manually](#).

Adding permit scopes

You can add permit scopes to define the situations in which a permit must be automatically created and linked to an order. See [Permit scopes](#).

To create a permit scope, relevant permit types must already be available.

Procedure

1. In the Permits TSI, go to the Permit types selection level.
2. Select the permit type for which you want to create a permit scope.
3. Go to Permit scopes.
4. On the action panel, click Add.
5. On the data panel, enter the required information.



You must fill in one or more of the following fields as the criteria of the permit scope. Based on these criteria, permits will be automatically generated and linked to orders with matching values:

- Property
- Space

- Asset
- Order group

For information on the field descriptions, see [Permit scope fields](#).

6. Click Save.



The permit scope is created for the selected permit type. Every time an order is added that meets the criteria set in the permit scope, a permit with status **Requested** is automatically created at the **Permits** selection level. As Health & Safety officer, you must assess the new permit, define a valid period and set its status to **Approved**.

Adding permits manually

Procedure

1. Go to Permit type and select the permit type for which you want to create a permit.
2. Go to Permits selection level.
3. On the action panel, click Add.
4. On the data panel, enter the required information.

For information on the field descriptions, see [Permits fields](#).

Creating a standard request with linked permit types

You can also configure a standard request for the creation of permits, which can have one or more permit types linked. When an end user submits a request based on this standard request, a permit is created for the selected permit type and values of the standard request are taken over to the permit. For example, you can create permits for visitors to grant access to a specific property, space or asset.

Procedure

1. Go to Business process > Standard orders.
2. Add a standard request.

For more information, see [Adding a standard order](#).

3. Select the standard request you just created.
4. On the action panel, link one or more permit types.




You might need to configure the **Link permit types** action on the action panel.

Approving permits and assigning work

As Health & Safety officer, you can edit and verify (approve, reject, cancel) permits that were generated for specific orders and their associated work assignments.

Procedure


1. In the Permits TSI, go to the Permits selection level.
2. Search for the permits that are in the Requested status.

 Use filtering or drilling down to search for permits by specific criteria:

- Permits that are valid during a particular period
- Permits valid for a particular property, order group, space or asset
- Permit status

3. Edit the relevant permit data and set the permit's status to Approved.

The order (or the associated work assignment(s)) to which these approved permits are linked can now be assigned to internal tradespeople / field engineers.

 If you would like to receive a reminder when there are permits waiting for approval, ask your application manager to create an alert on unapproved permits.

Assigning work assignments with permits

If you use the **Multiple work assignments** feature, an order might have several associated work assignments. The permits linked to the order also apply to these work assignments. This implies that the validation whether the permit is approved, occurs upon assigning the work assignment.

Procedure

1. Go to the Orders selection level and select the order that needs to be assigned.
2. Verify that relevant permits are linked to it.
3. Go to the Order details selection level and click Work assignments.
4. Select the work assignment you want to assign.
5. On the action panel click Assigned.

Only work assignments with permits that have the **Approved** status can be assigned to an internal tradesperson. If multiple permits are linked to the order, all have the **Approved** status. If the linked permits are not approved, the status of the related work assignment(s) cannot be set to:

- **Assigned**

- **Work**



If one or more linked permits have a status other than **Approved**, you will get a message that assigning is not possible.

Permits - Field descriptions

Permit type fields

Field	Description
Code	Displays a unique system generated (alphanumeric) code. If code is not generated automatically, then enter a code for the permit type.
Description	Enter a description for the permit type.
Comments	Enter a comment, on the permit type, if required.

Permit scope fields

Field	Description
Code	Displays a unique, system generated (alphanumeric) code. If code is not generated automatically, then enter a code for the permit scope.
Permit type	Displays the selected permit type. This field can be edited.
Property	Select a property that is relevant for the permit scope.
Space	Select a space that is relevant for the permit scope.
Asset	Select an asset that is relevant for the permit scope.
Order group	Select an order group that is relevant to the permit scope.

Order groups fields

Field	Description
Code	Displays a unique system generated (alphanumeric) code. If code is not generated automatically, then enter a code for the order group.

Field	Description
Code group	Displays the unique system generated code group.
Description	Enter a description for the order group, if required.

Permits fields

Field	Description
Code	Displays a unique system generated (alphanumeric) code. If code is not generated automatically, then enter a code for the permit.
Description	Enter a description for the permit.
Comments	Enter a comment, if required for the permit.

Index

A

- Adding permits
 - manually 11
- Approving permits
 - for order 12
 - for work assignment 12
 - validation process 12
- Assigning work
 - work assignments and permits 12

C

- concepts 6
- create permits manually 8
- create permits through permit scopes 8
- create permits through Standard request 8

F

- Filters
 - Assets 8
 - Order groups 8
 - Spaces 8

H

- H&S officer 12
- Health & Safety officer
 - Permits TSI 6

P

- Permit
 - properties with permit 8
- Permit scope
 - add 10
 - asset 7
 - order group 7
 - property 7
 - space 7
- Permit type
 - add 10
 - link documents 7
 - linked to scopes 7
- Permits
 - Back-office 6
 - concept 6

- Field engineer 6
- introduction 5
- link communications log 6
- link documents 6
- link order 6
- prevention H&S issues 5
- Responsibilities 6
- Roles 6
- Tradesperson 6
- Permits status 8
- Permits TSI features
 - app integration 6
 - approval 6
 - scope 6
 - workflow 6
- Permits: fields 14
- Permit-to-work 6
- Planning a work assignment 8

R

- Requested permits 11

S

- Status transitions 8

V

- Visitor access
 - permit 11
 - via standard request 11

W

- Working with... 10