



Personnel

Planon Software Suite

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

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

Document Conventions

Bold

Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text

Application names are displayed in italics.

CAPITALS

Names of keys are displayed in upper case.

Special symbols



	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Personnel

The Personnel TSI is an essential part of Planon ProCenter . It helps you to add, modify or delete personnel data, archive persons or link visitors to persons.

You can manage the personal, functional and work-related data of your employees. You can also learn how to register persons and visitors data effectively and centrally.

The Personnel TSI enables you to approach any required data in different ways. Additionally the **Authorization** and Field definer TSIs are developed to offer ultimate flexibility in configuring your system. As a result, your user interface might differ from the examples used here.

Concepts

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

Departments

You can add or retrieve people of a particular department in the **Departments** step. Depending on your settings, you can select one or more departments in this selection step. This enables you to retrieve information about all the people working there.

You can archive or retrieve the departments using **Transfer to archive** and **Retrieve from archive** options. If you archive a department, all the sub departments are also archived. If you retrieve a department from the archive, all the sub departments are also retrieved from the archive.



The ability to inherit the name and the code of a selected item can be activated or deactivated in the TSIs TSI.

Employment types

An employment type indicates the contractual work relation a person has with your company, such as part-time, full-time, or external. The **Employment types** selection step enables you to select the defined existing employment types in your organization.

Here you can maintain the employment type list, that you can use in **Employment type** field at the **General** tab of the **Personnel** selection level. .

Through the employment type list you can specify the employment type of each employee. The **Employment types** selection step can also be used to retrieve personnel of a particular employment type. To do so, you must first select an employment type at the **Components** selection level and then go to the **Personnel** selection level.

Positions

You can select the defined existing positions in your organization using **Positions** selection step. It is also used to maintain the **Positions** list, that you can use in PersonnelGeneral > Posotion field.

The **Positions** selection step can also be used to retrieve personnel who hold a particular position within your organization. To do so, first select a position in the **Components** selection level and then go to the **Personnel** selection level.

Each position is linked to a number of square meters/feet of floor area. This enables you to classify personnel according to space requirements. In the Spaces & Workspaces TSI,

these space requirements are used to evaluate the total floor area required by all the people that are linked to a particular space.

Person types

A person type classifies how a person interacts with your organization's work processes. Examples of person types are internal coordinator, external contact person, supervisor, subcontractor, and so on.

You can define a maximum of 10 person types. The **Person types** selection step enables you to select the defined existing person types within your organization. You can link a person to a person type by selecting a person type in the **Person types** selection step and then selecting a person from the **Personnel** selection level.

You can also view personnel of a particular person type. To do so, select a person type from the **Components** selection level and then go to the **Personnel** selection level. The link between personnel and person types enables you to retrieve filtered pick lists in other TSIs that contain personnel of a particular person type.

Skills

The **Skills** step allows you to create skills that can be linked to a person. You can create skills according to the business domain and employee skill sets of your organization. For example, if you are a software organization, you can create your employee skill sets as required in your organization.

The skills created in this step can be linked to person(s) on the **Personnel** level. You can link one or more skills.

Work addresses

You can see the complete address list of business contacts of your organization on the **Work addresses** selection step. This address list is maintained in the Addresses TSI, although it can also be modified in the Personnel TSI.

The contact persons for the selected address appear when you select an address in the **Work addresses** list and then go to the **Personnel** selection level.

You can also link a work address to a person. You can select a work address in the **Work addresses** selection step and then go to the **Personnel** selection level, where you can add a person. This person will be a contact person for the selected work address.

Assigning a work address to a person can help you find the work address of a particular person in other navigation groups. For example, a requestor's work address in the **Service Desk** TSI.

Communication logs

Communication logs are records of communication regarding an item that is added to Planon ProCenter . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls and so on.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.


Communication logs can be added for many elements, for example orders (all order types), properties, visitors, budgets, invoices, and so on.


For communication logs that were automatically created for alerts or forms through the **Log to communication log** field, the **Action** field will be updated to reflect the source. For more information, see [Communication log fields](#).

 You can create an action definition in Alerts to automatically delete communication logs based on a schedule.

Personnel

Personnel data can be edited at the **Personnel** selection level. Depending on the selections you have made at previous selections, a specific set of people with their data is available at this selection level. Here you can modify the personnel data or link a new person to the selected criteria.

 You can provide additional information about the person in the **Information text** field that appears when this person is entered as the internal requestor on orders.

 For more information on using the **Information text** field, see [Displaying additional requestor / asset information on an order](#)

Visitors

You can add both internal and external visitors.

- An internal visitor is a person of your organization who visits a person or a department within your organization. You can add an internal visitor by adding the visiting information of the personnel.
- An external visitor is an external person visiting your organization. If the visitor is regular, their existing information can be used while adding the information about their visits. If the visitor is visiting for the first time, the visitor information must be filled in.

Keys or key sets for personnel or visitors

To maintain a smooth and efficient work flow regarding personnel and visitors, it is sometimes necessary to grant access to these individuals to the buildings, spaces

or assets for a specific period of time. For example, you might want to grant access to external ICT advisors, who will check and update your ICT network, or grant access to your internal technicians who will check the air conditioning throughout your organization's buildings.

The functionality for issuing and returning keys and key sets is included in both Access and Personnel on the **Keys and key sets** selection level, where you can assign keys and key sets to personnel or visitors.

Resource activities

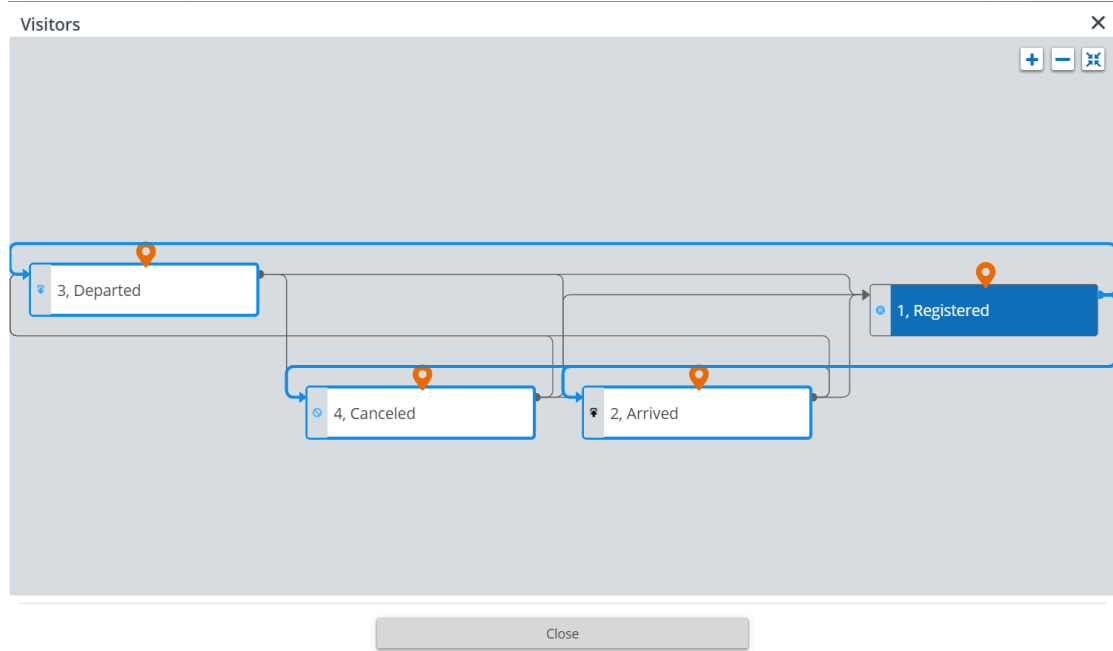
From Details > Resource activities you can add various resource activities to a selected person that cause this person's temporary unavailability for work. You might have only one single type of resource activity available or various configured types. Examples of such configured resource activities are *Training, Illness, Holiday* and so on. The resource activities that are added to a person in Personnel also appear for this person on the planboards in **Resource Planner**. If work is already planned for the period of the resource activity, you will be automatically warned about this so that you can take appropriate action.



In Field definer , your Planon administrator can configure various user-defined types of resource activity on the **Resource activities** business object. For more information on adding user-defined resource activities, see [Adding Resource Planner configurations](#) or see [Adding a user-defined business object to a TSI](#) .

Viewing the flow diagram

This image represents all status transitions that are possible for a selected visitor. You can view this from the action panel **Show flow diagram** option.



For more information on the usage of buttons in the **Flow diagram** window, see [View status flow](#).

For more information on creating and maintaining your own statuses and status transitions, see [Creating user statuses](#).

Working with personnel

This section describes the various functions available.

Activating a person type

Prerequisite

- You must have the appropriate authorization.

Procedure

1. Go to Components > Person types.
2. Click the Type you want to activate.
3. Set the Activated field to Yes.
4. Click Save.



The person type is now activated. It appears in the **Personnel** selection level. You can use the newly added person type and link it to a particular person.

Linking persons to skills

You can link personnel/employees to skills.

Procedure

1. Go to Components > Skills.
2. Select a skill that you want to link to the person(s).
3. On the action panel, click Link persons.
4. In the Link persons dialog box, select the relevant person(s).
5. Click OK.

The selected person(s) is/are linked to the skill.



If you select one or more skills and go to the **Personnel** level, you see all persons linked to one or more of the selected skills.

Linking skills to persons

Skills created in the Components > Skills step can be linked to personnel/employees.

Procedure

1. Go to Personnel and select a person to whom you want to link skills.
2. On the Links action panel, click Link skills.
3. In the Link skills dialog box, select the skills.
4. Click OK.

Linking personal certificates to a person

1. Go to Details > Personal certificates.
2. On the action panel, click Add.
3. In the data panel, complete the relevant fields. For a description of these fields, see Personal certificate fields.
4. Click Save.



In [Resource Planner](#), you can filter personnel by the certificate types that are filled in here.

Generating a personal calendar

You can create a personal calendar. The personal calendar is generated as a sub calendar under the default company calendar. When you generate a personal calendar, it inherits the settings of the company default calendar.

Procedure

1. Go to Personnel and select a person for whom you want to create a calendar.
2. On the action panel, click Generate personal calendar.



You can also assign a personal calendar to the selected person by selecting an existing calendar from the **Calendar** field.

Using the **Action on selection** you can generate multiple calendars for multiple persons at a time.



For more information on using action on selection on multiple elements, see [Action on selection](#).

Viewing the workspace occupancy

You can view the workspace occupancy details of a person in Personnel in these ways:

- From **Details > Occupancies** selection step, you can view or add workspace related details of all persons in **Personnel** . Select a person and go to **Occupancies** to view or modify the occupancy data of that person. For information on the data, see [Occupancy fields](#).
- In the **Workspace occupancy** field in the person's data on the **Personnel** selection level. For more information, see [Personnel fields](#).

Linking positions

You can link one or more positions to a person. For more information on positions, see [Positions](#).

Procedure

1. Go to the **Personnel** selection level.
2. Select the person for whom you want to add one or more positions.
3. On the data panel, click in the **Position** field.
4. Select the position(s) you want to add.
5. Click **OK**.

For more information about position details, see [Personnel fields](#).

Maintaining personnel history

In **Personnel** , at the **Details > Personnel history** selection step, you can enter or view the modifications made to the data fields associated with a specific person.

Maintaining history automatically

In **Field definer** , the **Planon** administrator or a user with similar authorization can enable an automatic **history** option for personnel fields. With this option enabled, any changes made to that field are saved automatically. The history of these field changes can be viewed in **Personnel** , at the **Visitors > Personnel history** selection step.



For details on changing field attributes via **FieldDefiner**, see **Field definer** .

Maintaining history manually

With the appropriate authorization, it is also possible to manually add history by entering a comment about the selected person.

Procedure

1. Go to Personnel selection level and select the person to whom you want to manually add a comment.
2. Go to Details selection level and select the Personnel history selection step.
3. In the action panel, click Add.
4. Type a comment in the Comment field.
5. Click Save.

Archiving personnel

You can transfer personnel data to your digital archive through the **Transfer to archive** option on the action panel. The ability to transfer personnel records to the archive depends on your settings and authorizations.



Once personnel data is archived, it becomes *read-only*, unless the **Is read-only when archived?** setting in Field definer specifies otherwise.

In general, the following applies when archiving a personnel record:

- If the person is linked to an active order, either as internal tradesperson or external contact person, it is not possible to archive.
- If the person is linked to a Planon user account, the link between person and user account will be broken.
- Non-archived linked visitor(s) can be archived as well. In that case, the visitor's status should either be **Departed** or **Cancelled**.

You can de-archive personnel using the **Retrieve from archive** option on the action panel.



It is not possible to retrieve a person if the linked work address is archived.

It is possible to schedule an action definition to archive persons. Visitors linked to the person will also be archived. Archiving personnel records will not succeed if any linked visitors cannot be archived. This will be logged in the **Log viewer**. If there are any additional links to business objects that block archiving a person, it will also be logged in the **Log viewer** (for example: active orders, issued keys, inventory items, contracts, communication logs). For more information on creating an action definition, see [Alerts](#).


Adding visitors

You can add internal or external visitors by adding their visiting information.

Procedure

1. Go to Details > Visitors.
2. On the action panel, click Add.

3. In the data section, complete the relevant fields. For a description of these fields, see Internal/External visitor fields.
4. Click Save.


 To display the visitors visiting information on a particular date, you can use a filter in which you specify a date in the **Visiting date** field. You can create a date macro instead of a date in this field.

Making visitors recurrent

You can specify that you want a visitor to recur at regular intervals, for example every day, week or month or in the first week of each month. It is also possible to make a visitor recur without a fixed cycle.

Procedure


1. Go to Details selection level and select the visitor you want to make recurrent.

 Visitors that are linked to a reservation cannot be made recurrent and recurring visitors cannot be linked to a reservation.

2. From the action panel, click Make recurrent.

The **Schedule** dialog box appears.

3. Select the required frequency, Daily, Weekly, or Monthly.

 Select the **Calendar** option if you want to make visitors recur without regular intervals. You can select the required dates by clicking them in the calendar while holding down the CTRL key.

After you have selected the required frequency, you should specify the corresponding options in the **Schedule** dialog box.

Daily

Schedule ✕

Frequency

Daily
 Weekly
 Monthly
 Calendar

Period

Set manually
 Predefined

Starts on **1**

Create **2** recurrences
 Ends on

Occurrences

Every days **3**

Save settings

- 1** Recurrence start date.
- 2** Specify either a fixed number of recurrences or a fixed end date.
- 3** Number of days in between two recurrences.

Weekly

Schedule ✕

Frequency

Daily
 Weekly
 Monthly
 Calendar

Period

Set manually
 Predefined

Starts on

Create recurrences

Ends on

Occurrences

Every weeks **1**

Monday
 Tuesday
 Wednesday
 Thursday
 Friday


Saturday
 Sunday

Save settings **2**

- 1** Number of weeks in between two recurrences.
- 2** Day(s) on which the recurrence should be scheduled.

Monthly

- 1 Select the day of the month on which the recurrence should be scheduled (fixed date).
- 2 Select the recurrence pattern for months and set the day selection criteria.
- 3 Select the day on which the recurrence should be scheduled.

 In the months with fewer days than the specified value, the recurrence will be made on the last day of the month.

4. Click OK to confirm your settings.
A **Question** dialog box appears.
5. Click OK to continue.

Archiving visitors

You can transfer visitors to a digital archive.

 Once visitor data is archived, it becomes *read-only*, unless the **Is read-only when archived?** setting in Field definer specifies otherwise.

The ability to transfer a visitor to the archive depends on your settings and authorizations. By default, only visitors with the system statuses **Departed** and **Cancelled** can be transferred to the archive.



On archiving a visitor, information regarding issued/returned key sets is removed.

Linking a visitor to a reservation

When adding new visitors, you can directly link them to a reservation from the Reservations , for example if the visitors are participants for a course or a meeting.



Visitors that are linked to a reservation, are automatically visible in the Reservations , at the **Reservations details > Visitors** selection step.

Procedure

1. Add a visitor in the Visitors selection level.
2. Complete the fields in the data panel.
3. Select the Swap reservation option from the action panel.

The **Enter values** window is displayed.

4. In the Meeting field, select the reservation to which you want to link the visitor concerned and click OK.

The **Enter values** window displays again.

5. In the Enter values window, click OK.



If a visitor has already been linked to a reservation but you want to change the reservation the visitor is linked to, you can use the **Swap reservation** option to select another reservation.

Saving and loading the user settings of recurring reservations

You can save and load the user settings of recurring reservations of both visitors and orders by selecting **Save settings** in the **Schedule** dialog box.



With the **Save settings** option, all settings, except the start date, of the recurring reservation are saved. However, if the **Calendar** option is chosen, the selected dates are also saved.

If the check box is not selected, the default values are displayed.

The **Load settings** button, allows you to load the last saved user settings. This is useful if you want to display the last saved user settings while the **Save settings** check box is not selected.

Filtering on car parks

To enable filtering on car parks on the **Visitors** selection step, proceed as follows.

Procedure

1. In Field definer, on the Business objects level, select Visitors.
2. Click Under construction.
3. Go to Details.
4. Select the Car park field and click In selection.
5. Click Save to apply your changes and return to **Business objects**.
6. Change the status to **Completed**.
7. Press F9 to refresh cache.
8. Go to Personnel > Details > Visitors selection step.
9. On the filter bar, click Add filter.

Issuing keys or keys sets to personnel or visitors

Key sets can be issued to personnel or visitors. Individual keys can only be issued to personnel.



It is not possible to issue a single key to a visitor. If you want to issue a single key to a visitor, you must create a key set with only one key.

Procedure

1. From the Personnel selection level, select a person
Or
From the **Visitors** selection level, select a visitor.
2. Go to Keys and key sets.
3. To issue individual keys to a person, select the Issued keys or Issued and returned keys selection step.
Or
To issue a key set to a person or visitor, select the **Issued key sets** or **Issued and returned key sets** selection step.
4. In the action panel, click Issue.

5. In the data panel, complete the relevant fields.
For a description of these fields, see [Issuing keys or key sets fields](#).
6. Click Save.

Returning keys or key sets

Key sets and keys are returned at the **Keys and key sets** selection level.

Procedure

1. From the Keys and key sets selection level > Issued key sets or Issued and returned keys selection step, select the issued key or key set that is about to be returned.
2. In the action panel, click Return.
3. The Returned on field is now stamped with the current date-time.

Viewing all issued and returned keys or key sets

If you want to display a list of all keys or key sets that have ever been issued to a person or a visitor, as well as the ones that have been returned, use the following procedure:

Procedure

1. From the Personnel selection level, select the person for whom you want to retrieve all keys or keys sets that have ever been issued.

Or

From the **Details** selection level, select the visitor for whom you want to retrieve all key sets that have ever been issued.

2. Select Key and key sets > Issued and returned keys or Issued and returned key sets selection step.
3. View the list and corresponding data.

CAD Integrator in Personnel

CAD Integrator is a tool that you can use to create graphical representations of spatial information that is registered in Planon ProCenter . In Personnel you can start CAD Integrator by clicking the relevant toolbar button, to display a selected person/visitor graphically in a converted AutoCAD drawing.

In Personnel , CAD Integrator is available at the following selection levels:

- At the **Personnel** selection level.
- At the **Visitors** selection level.






For more information on using CAD Integrator in Personnel , see [CAD Integrator](#).


Personnel – Field Descriptions

Personnel fields

Field	Description
General	
Code	A person's unique code. It is either automatically generated or manually entered.
Person type	Link a relevant person type to a person. You can select one or multiple person types from a pick list.
Personal data	
Gender	Select the person's gender: Male , Female or X (gender-neutral).
Professional title	Specify how this person must be addressed: with Mr, Mrs or Ms.
Initials	Enter the person's initials.
First name	Enter the person's first name.
Prefix	If relevant, enter the person's prefix.
Surname	Enter the person's surname.
Photo	Upload a picture of the person in this field.
Alias	If applicable, enter the person's abbreviated name or alias, which is used for identification in a corporate application, for example.
Contact details	
Phone number	Enter the person's land line telephone number.
Mobile phone number	Enter the persons mobile phone number.
Email	Enter the person's email address.

Field	Description
Location details	
Property	Select the property in which the person is working. A dialog box referring to the Spaces & Workspaces TSI is available in this field.
Space	Select the space in which the person is working. A dialog box referring to the Spaces & Workspaces TSI is available in this field. Whenever you add or change value in this field an occupancy record is automatically created. For more information, see Occupancy .
	<div style="border: 1px solid black; padding: 5px;"> <p> You cannot assign a person to a non-assignable spaces (type). For more information, see Space types fields.</p> <p> By default, the CAD Integrator highlights the space or the fixed workspace of the selected person.</p> </div>
Work address	Select the address or service team to which this person is linked. A dialog box referring to the Addresses TSI is available in this field.
Move date	Select a date on which the person is moved.
Workspace occupancy	Shows the workspace occupancy of the person and the Neighborhood to which the person is linked. You will find only the current and future workspace occupancies of a person based on the reference date. If there is no reference date available, the system time will be used.
Hide location in app?	Set this field to Yes if you want the selected person's privacy respected on the Planon app with regard to their work location. Details about this location will be hidden on the app.
Country	Select the work country of the person.
Position	
Position details	<p>Editable field, related to Strategic Workspace Planning, which shows the Code, Name and Percentage related to the selected person's position. Click the  icon to delete the position. You can add or modify the position percentage value in the field Persons - positions.Percentage.</p>



Field	Description
Position	Enter the position the person is holding.
Department	From the dialog box available in this field, select the department for which the person is working.
Status employee	Displays the current status of this person.
Cost center	Select the cost center to which this person is linked. (The data in the dialog box that is available in this field is maintained in Supporting data).
Tariff group	Enter the relevant tariff group for this person.
Special tariff	Link a special tariff to a person/employee, for example for working overtime or weekends. The special tariff will help calculate the correct labor hour costs in Service Manager. They are applied to maintenance plan orders and orders used in <i>Planon Mobile Field Services</i> , to calculate those labor hour costs that are related to overtime or to specific job profiles.
Employment type	Select the person's employment type from the dialog box in this field.
Card number	Enter the person's access card number.
Calendar	Select a relevant calendar for the person.
Availability	<div data-bbox="618 1297 1317 1381" style="border: 1px solid black; padding: 5px; margin-bottom: 5px;">  For more information on defining calendars, see Calendars. </div> Select the relevant availability of the person: <ul style="list-style-type: none"> • At home • At work • Free • Private • Travel
Skills details	This field displays the skills linked to the selected person via the Link skills action on the action panel.

Field	Description
Certificate details	This field displays the certificates that are linked to the selected person on the Details level.
Comment	In this field you can enter additional notes on the selected employee or contact person.
Information text	In this field you can enter information on the employee which will show up if this person is entered as the requestor of an order / request.
Total FTE (based on contract)	The person's FTE as specified in the contract.
Correction FTE (not in office)	The proportion of the FTE during which an employee is not in the office.
CAD Integrator symbol name	Link a CAD Integrator block symbol to a person, to be able to display this person in CAD drawings.
Main enterprise	Select the main company / holding for which this person is working. A dialog box referring to the Addresses TSI is available in this field.
Transferred to archive	Displays whether this person's record was transferred to the archive.
Service Providers solution mode	
Proactive reporter of work?	Select Yes if you want to allow this person (in the role of tradesperson or field engineer) to proactively report <i>new work</i> that was not specified initially within the customer contract. The related contract line must be of the Proactive contract line type.
	<div style="border: 1px solid #00a0e3; padding: 5px; display: inline-block;">  See Contract lines for customer contracts for more information. </div>
Tradesperson category	If the selected person is an internal tradesperson / field engineer, select a Tradesperson category here that will be applied when orders are generated for this person and labor hour revenues are calculated. See Tradesperson categories in the Service Providers documentation for more information.

Personal certificate fields

Field	Description
Code	Enter a valid code for the personal certificate.
Name	Enter a relevant name to understand the personal certificate.
Certificate type	Select a certificate type from the list. This list is defined in the Supporting data . For more information, see Supporting data > Certificate types .
Person	Select a person from the list with the relevant certification.
Valid from	Select a start date for the validity of the certificate.
Valid up to and including	Select an end date for the validity of the certificate.
Secure document	Upload a relevant certificate copy.



Internal/External visitor fields

Field	Description
Name visitor	Displays the name of the visitor selected in the internal/external visitor's field.
Name internal visitor	Select the name of the internal visitor from the dialog box. Note that this name is populated automatically in the Name visitor's field.
	<div style="border: 1px solid red; padding: 5px;">  Select either an internal visitor or an external visitor, not both. </div>
Organization	Specify the name of the organization.
External visitor	<p>Select the name of an existing external visitor from the dialog box. The information specific to the selected visitor is displayed. If required modify the information of the external visitor. Click OK.</p> <p>Or</p> <p>On the action panel, click Add to add an external visitor. Click Save and click OK.</p> <div style="border: 1px solid blue; padding: 5px;">  For more information on external visitors, see External visitor fields. </div>

Field	Description
License plate number	Displays the license plate number of the external visitor's vehicle.
Visitor status	Displays the status of the visitor. The visitor's status can be changed in the Status transitions action panel. For example, arrived, departed or canceled.
Visiting date	Specify the date of visit.
Organization	Specify the name of the organization of the visitor.
Actual time of arrival	Specify the actual arrival time of the visitor.
Actual time of departure	Specify the actual departure time of the visitor.
Person	Specify the name of the person whom the visitor is going to visit.
Department	Specify the department of the person whom the visitor is going to visit.
Organization	Specify the name of the organization of the person whom the visitor is going to visit.
Number of people	Specify the number of visitors.
Property	Specify the property of the person whom the visitor is going to visit.
Parking spaces	Enter the number of parking spaces required.
Start time parking	Specify the start time of parking.
Expected arrival time	Specify the expected time of arrival of the visitor.
End time parking	Specify the end time of parking.
Expected time of departure	Specify the expected departure time of the user.

Issued keys or key sets fields


Field	Description
Issued on	Enter the date on which the key or key set is issued.
Requested return date	Enter the date-time on which the key or key set must be returned.


Field	Description
Returned on	<p>When the key or key set is actually returned (by clicking Return in the action panel), this field is automatically stamped with the current date-time. The date-time can also be entered manually.</p> <p>Use the CTRL+D shortcut keys to quickly enter the current date-time.</p>
Issuing comment	If required, enter a comment on the issuing the key or key set.
Returning comment	If required, enter a note on the returned key or key set.
Key	<p>Select the key that you want to issue in the dialog box that is available in this field.</p> <div data-bbox="599 770 1317 856" style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;">  </div> <p>The dialog box only displays the available keys, that is, keys that have not been issued and that are not part of a key set.</p>
Key set	<p>Select the key set that you want to issue from the dialog box that is available in this field.</p> <div data-bbox="599 1077 1317 1163" style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;">  </div> <p>The dialog box only displays the available key sets, that is, key sets that have not been issued.</p>
Person	Displays the selected person. If required, you can select another person from the dialog box that is available in this field.
Visitor	Displays the selected visitor. If required, you can select another visitor from the dialog box that is available in this field.

Work assignment fields

Field	Description
Action date-time	Date-time stamp, displaying the date-time of the last action by the assigned user (tradesperson / engineer).

Field	Description
Actual start date-time	<p>Example: an engineer completes a job on the device, but is working offline. The Action date-time will be populated with the moment the job was completed on the device. The Ended on field however, is populated with the moment the back-office sets a status to finalize the job.</p>
Actual start date-time (user)	<p>This field is automatically populated with a date-time as soon as the work assignment's status is set to Work. The date-time represents the time zone of the property.</p>
Actual end date-time	<p>This field is automatically populated with a date-time as soon as the work assignment's status is set to Work. The date-time represents the time zone of the user.</p>
Actual end date-time (user)	<p>This field is automatically populated with a date-time as soon as the work assignment's status is set to Declined, Stopped, Temporary fix or Done. The date-time represents the time zone of the property.</p>
Actual end date-time (user)	<p>This field is automatically populated with a date-time as soon as the work assignment's status is set to Declined, Stopped, Temporary fix or Done. The date-time represents the time zone of the user.</p>
<p>All work completed? <i>[only editable on a key work assignment]</i></p>	<p>If the Main responsible engineer sets this field to Yes on a Key work assignment and the work assignment's status is Done, the order is completed. If this field is set to No and the work assignment status is then set to Done (and there are no other active key work assignments), the order is put On hold.</p> <p>If this field is empty (=default value) and the key work assignment is set to Done, the order is set to Completed.</p>
Appointment booking?	<p>Click Yes if the work assignment must appear as an appointment booking on the mobile device of the field engineer (internal tradesperson). Once made into an appointment booking, it has a fixed start date. Field engineers can recognize appointment bookings by their icon in the PMFS app. The default setting in this field is No.</p>

 The following applies to both 1: 1 planning and 1: n planning: if one associated work assignment is defined as an appointment booking, the corresponding order is also defined as an appointment booking.

Field	Description
Assigned hours	<p>This field is only applicable and editable when the Work assignments license and feature switch are activated (to enable <i>multiple work assignments</i> on an order). Precondition: The Original budgeted hours field on the order must contain a value. The Assigned hours field displays the calculated number of hours needed by the tradesperson to carry out the work assignment. For more information, see Budgeted hours'based resourcing.</p>
Default work assignment?	<p>Indicates whether this work assignment was based on a work order that existed before you upgraded to work assignments. It will be used for synchronizing existing jobs that do not have work assignment information yet.</p>
Effort	<div data-bbox="607 758 1317 884" style="border: 1px solid #0070C0; padding: 5px;"> <p> This field is only applicable and editable if the Work assignments license and feature switch are <u>not</u> activated.</p> </div> <p>Displays the number of hours needed to complete the work assignment. Any changes to the tradesperson or the Start date-time will lead to recalculating the End date-time.</p>
Ended on	<p>Date-time stamp for ending the work assignment. A work assignment is considered 'ended' if the back-office sets a final status (Declined, Temporary fix, Stopped or Done). This field does not take into account the Action date-time.</p>
Expected arrival date-time	<p>Displays the expected arrival date-time entered by the tradesperson / engineer on accepting the work assignment.</p>
Internal tradesperson	<p>Select the tradesperson / field engineer who must carry out the work assignment.</p>
Keep in sync?	<p>Technical field, used to update the order with data from the work assignment or vice versa.</p>
Key work assignment	<p>Indicate whether the work assignment is a key work assignment.</p>
Order	<p>Displays the order to which the work assignment is linked.</p>
Planned end date-time	<p>Specify the date and time at which the work should be ended. The end date-time is calculated automatically if the Effort or Assigned hours fields</p>

Field	Description
Planned end date-time (user)	are filled in. This date-time is based on the time zone of the selected property.
Planned start date-time	Specify the date and time at which the work should be ended. This time represents the time zone of the user.
Planned start date-time (user)	Specify the date and time at which the work should be started. This date-time is based on the time zone of the selected property.
Planned start date-time (user)	Specify the date and time at which the work should be started. This time represents the time zone of the user.
PMFS status	Displays the processing status of the PMFS work assignment: <ul style="list-style-type: none"> <li data-bbox="768 806 1166 932">• empty: the work assignment is either not on the device, or on the device, but not yet accepted or rejected. <li data-bbox="768 953 1182 1150">• Accepted: the engineer has accepted the assigned work assignment (job) on the mobile device. Even if the engineer works offline, the job will remain on the device. <li data-bbox="768 1171 1182 1535">• Finished: the engineer has <i>ended</i> the work assignment on the mobile device (End work, Discontinue, Temporary fix, Reassign or EHS declined). After changing to this status, both the work assignment and order are updated with the data added by the engineer. The job is removed from the device. <li data-bbox="768 1556 1166 1682">• Retracted: the work assignment has been successfully retracted by the back-office.
Reason	If an action + reason has been configured for the this work assignment's status, the Reason field refers to the reason entered by the tradesperson / engineer on a specific action (status transition).

Field	Description
Reason for sign-off refusal reason	Displays the reason entered by the customer when refusing to sign-off the job on the tradeperson's / engineer's mobile device.
Retracted by back-office?	This field is set to Yes if a work assignment is stopped by the back-office, while it was already accepted by the field engineer. There may still be job data on the device. A warning is shown in Planon ProCenter that job data will be retracted upon the next synchronization of the device. On the app, the field engineer is informed that the job has been retracted by the back-office. The job data is automatically sent to the back-office. Once processed, the PMFS status field is set to Retracted .
Status	Displays the system status of the work assignment.
Trade	Reference to the trade that applies to the work assignment.

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