



# Planon AppSuite - Configuration Guide

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](mailto: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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## Planon AppSuite Field Services - Overview

**Field Services** is a vital link in the chain of field workers, enterprise office systems and customers.

It mobilizes business processes to give field personnel and office-based workers real-time access to information available in enterprise systems, whether they work at a desktop terminal or a mobile computing device. This allows personnel – regardless of location – to share critical information with regard to orders, properties and assets. As a result, your field workers arrive at the customer location in time, with the right equipment and information to complete their jobs efficiently.

PMFS enables:

- **Field workers** (engineers) to interact seamlessly with the systems and experts in the back office.
- **Key personnel** (planners, coordinators) in the back office to track the mobile workers, so that customers can be updated about the work status.
- **Customers** to reduce costs while enjoying top-class performance.

In short, PMFS provides a complete enterprise mobility solution that enables your field workers to be more productive, which in turn contributes to increased customer satisfaction.

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Important to know

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## Important to know

### Product

Planon AppSuite - Field Services:

- is part of the mobile platform in Planon Universe.
- can be used on mobile devices with an iOS or Android operating system.
- is optimized for tablets (landscape orientation), but can also be used on smart phones (portrait orientation).

### Configuration

- Make sure that, except for the fields that are mandatory in Planon ProCenter, no other mandatory fields are configured for the business objects used in Planon AppSuite - Field Services, unless they have a default value defined. Examples of such business objects are **Labor hours** and **Communication logs**.

#### Tip

For more information on mandatory fields, see *Field Definer*.

- If you want to show a job location on the map in the app, make sure that you register the corresponding GPS data in Planon ProCenter. Go to Property details > Properties. In the **GPS coordinates** field, enter the GPS coordinates, comma separated and without spaces [latitude coordinates,longitude coordinates].

#### Tip

For more information on property related fields, see *Property Details*.

- The only supported order types for Field Services are **Work orders** and **Planned maintenance orders** (and all their user-defined business objects).
- In Planon AppSuite - Field Services the same authorization settings apply as in Planon ProCenter. This means that the field engineers must have appropriate access to all relevant fields. Also, for a flawless order flow between field engineers and back-office, field engineers must be authorized to make the necessary status transitions on the work orders and planned maintenance orders used in Field Services.

#### Tip

For more information on authorizing end users, see *Authorization*.

- If single-sign-on (SSO) is required, it is recommended to upgrade to Planon Live version L56, or higher. As of *Planon Live* release L56, **Planon AppSuite** will support the same SSO configuration as Planon ProCenter. From L41 to L55 only limited SSO configuration is supported. Earlier releases than L41 only support SSO configuration in the Planon Cloud, using Keycloak and form-based authentication.

### Work assignments

#### Tip

If you intend to switch to Planon's **Work assignments** feature, please refer to the *Work assignments* part of the user documentation and find all relevant information on the implications,



configuration and behavior in relation to Planon AppSuite.

# About Planon AppSuite


Planon AppSuite is an app platform that can hold various app modules and additional features, such as **My jobs**, **Service Requests**, **Materials**, **Assets**, **Properties**, and **BIM Viewer**. The availability of these modules / features is licence-dependent.

See [Required product definitions](#) to find out which product definition is required for which module. For information about the web definitions you need to configure, see [Required web definitions](#).

## Required web definitions

AppSuite modules can be configured for multiple sites (property sets), via their relevant web definitions.

To be able to use the various Planon AppSuite modules, their corresponding web definitions (Web Configurations) must exist in your environment.

 In a Planon Accelerator environment, these web definitions are already available.

The following section lists which web definitions are required for which module:

For AppSuite in general:

- **Planon AppSuite - General** web definition

For PMFS modules:


- **Planon AppSuite - Field Services** web definition
- **PMFS** web definition


For the **Assets** module:


- **AppSuite - Assets** web definition

For the **Properties** module:


- **AppSuite - Properties** web definition

 For general information on adding web definitions, see the **Web Configuration > Adding a web definition** user documentation.


 It is possible to configure multiple sites containing AppSuite modules and provide relevant users (engineers) with access rights to multiple sites. These engineers will be able to switch between sites via an icon on their AppSuite menu. Precondition: each configured site must have an **AppSuite - General** web definition and at least one of the module web definitions. A site is always bound to a Planon *property set*. Switching sites may also mean involve switching between property sets. This does not require additional configuration.

 For general information on configuring property sets, see the **System settings > Property sets** user documentation.

## Required product definitions

 All Planon AppSuite users are required to have the **PSS2** (Planon ProCenter Self-Service) product definition. Additionally, depending on which AppSuite modules your users are going to use, the following licenses and product definitions are required:

Module, feature	Product definition	Description
<b>My jobs</b>	PMFS [product code L03000] PMFS-PRO [product code L03001]	Planon Mobile Field Services / Planon Mobile Field Services with support for stock
<b>Materials</b>	PMFS-PRO [product code L03001]	Planon Mobile Field Services with support for stock
<b>Service requests</b>	PMFS [product code L03000] PMFS-PRO [product code L03001]	Planon Mobile Field Services / Planon Mobile Field Services with support for stock
<b>Assets</b>	PMAV [product code L03002]	Planon Mobile Asset Viewer
<b>Properties</b>	PMPV [product code L03004]	Planon Mobile Property Viewer
<b>BIM features</b>	PMBV [product code L03003]	Planon Mobile BIM Viewer
<b>Advanced service requests</b>	PSS2	Planon ProCenter Self-Service

 PMFS-PRO is an extension to PMFS that supports **stock** products for PMFS. A field engineer either needs PMFS or PMFS-PRO, not both.

# Module sorting sequence in AppSuite

You can adjust the sorting order of AppSuite modules by changing their web definition code alphanumerically.

AppSuite modules are opened and presented to the user according to their original web definition code. If you want a different display sequence, you must alphanumerically change the web definition codes in such a way that your preferences are reflected on the app menu and also upon opening the app.

The following procedure is an example of how you can adjust the sorting via a *Planon Accelerator* environment.

In this example, the linked product definition is *PMFS Pro* and we want **My jobs** to be opened first and displayed first on the app menu. The **Materials** and **Service requests** modules will automatically be displayed below **My jobs**, since they come under the same product definition. We want **Assets** to appear next on the list and **Properties** at the bottom.

## Procedure

1. Log in as supervisor and go to the AppSuite navigation group on your navigation panel.
2. In Order settings, on the Planon AppSuite - Field Services tab, select the PMFS web definition (system name PMFS).
3. In the Code field enter a code that will make the corresponding modules (My jobs, Materials and Service requests) rank highest alphanumerically, for example M1\_PMFS.
4. Click Save.
5. In Asset settings, select the Assets web definition (system name Planon AppSuite - Assets).
6. In the Code field enter a code that will rank next alphanumerically, for example M2\_PMFS.
7. Click Save.
8. At Properties settings, select the Properties web definition (system name Planon AppSuite - Properties).
9. In the Code field enter a code that will rank last alphanumerically, for example M3\_PMFS.

**The app modules are listed on the app menu in the following sequence:**

- My jobs (M1)
- Materials (M1)
- Service requests (M1)
- Assets (M2)

- Properties (M3)

# General settings

Under AppSuite > General settings on your navigation panel, you can find a preconfigured web definition with general settings that apply generically to Planon AppSuite.

Specific settings for individual modules in Planon AppSuite are made in the dedicated web definitions.

## Adding a custom logo to Planon AppSuite

You can replace the default Planon logo in the hamburger menu by your own custom logo.

### Procedure

- 1. Go to AppSuite > General settings on your navigation panel.
- 2. In the Logo field, select or upload the custom logo you want to display on the AppSuite.


The image can have file extensions JPEG, JPG or PNG.


We strongly recommend to make the background of the logo invisible for the best display quality. We also recommend to use the same dimensions as the original Planon logo: 768x270 (width x height).

- 3. Click Save.

**Your custom logo is displayed on the AppSuite.**

## General settings - fields

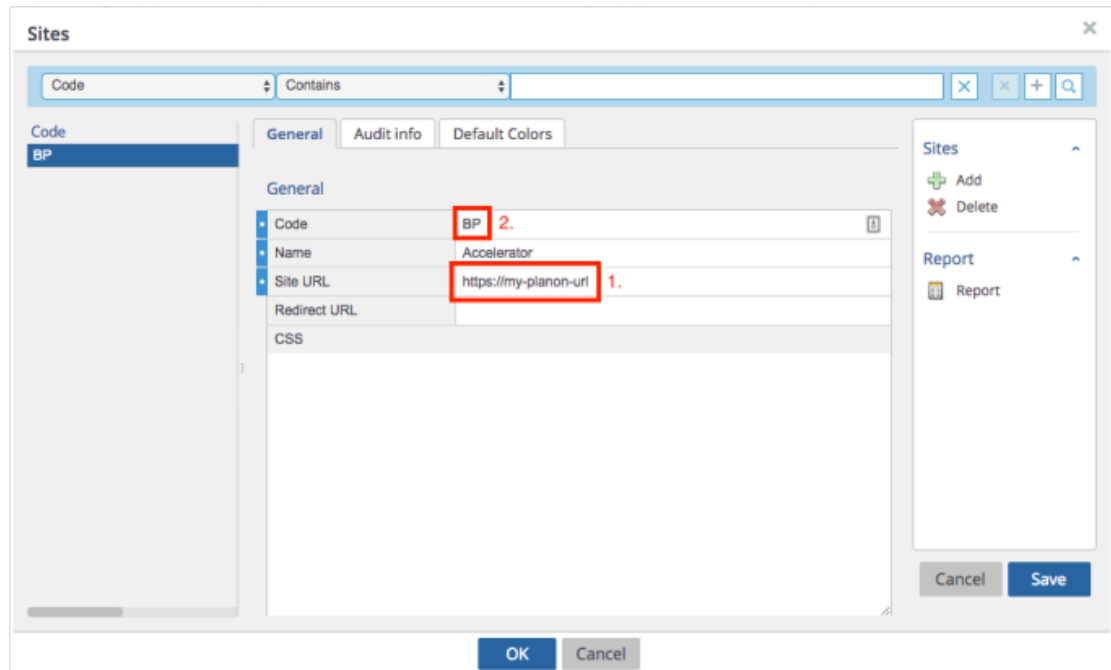
Field	Description
Logo	<p>Here, you can replace the default Planon logo on the app's start page by your own custom logo. The app's start screen is accessed by clicking the hamburger menu:</p>  <p>See also: <a href="#">Adding a custom logo to Planon AppSuite</a>.</p>
Open URLs in external browser?	<p>URLs can either be opened inside the app by using the in-App browser, or by using an external browser.</p>

Field	Description
	<p data-bbox="732 260 1317 352">If you click <b>No</b>, all URLs will be opened inside the app. If you click <b>Yes</b>, they will be opened in an external browser.</p> <div data-bbox="602 373 1318 531"> Make sure that for URLs opened inside the app, no basic authentication is required to access any document. If basic authentication is required, it is recommended to open URLs in an external browser.</div>

# Retrieving the AppSuite login URL for end users

As Planon administrator, you can easily retrieve the relevant domain URL that can be used by end users to log on to the app:

Retrieve the URL from Planon Accelerator Web Client at **AppSuite > General settings** by clicking the **Select site > Accelerator** button at the top right of the screen, followed by clicking **Edit sites**. From the **Sites** dialog box, the **Site URL** (1) and the **Code** (2) must be copied and connected by a forward slash, as in the following example. This is the URL that can be used to log on to the app.





# Updating the app

The Planon AppSuite app that you install from the app store (Apple App Store, Google Play Store), is a 'container' app that is updated via the Planon ProCenter back-office. These updates are done via a *hot code push* procedure.

Thanks to AppSuite's hot code push procedure, you are able connect to various environments, for example *Production version X* and *Acceptance version Y*.

## Hot code push procedure

On each login and on each online action, AppSuite checks if it still matches with Planon ProCenter (the back-office).

If the two do not match, the hot code push procedure will be triggered. During the **Updating application** process, the files that need to be updated in AppSuite are downloaded. After the hot code push procedure is completed, data between AppSuite and back-office can be synchronized. If the hot code push fails, the jobs cannot be synchronized.



The hot code push could also fail due to network problems. In that case, contact your network administrator.

If the hot code push fails, users can continue working offline. As soon as the device comes online, the hot code push procedure is automatically triggered again.

The hot code push URL is constructed as follows:

```
https://[Site URL]/wicket/resource/nl.planon.pssm.nova.engine.wicket.NovaWsPage/nova_app
```

Files downloaded during a hot code push can have the following extensions:

- .js
- .txt
- .css
- .svg
- .html
- .dds
- .Json
- .Png
- .ttf
- .woff
- .eot

- woff2
- .ttf
- .scss
- .jpg



Currently, the AppSuite modules are approximately 15 MB. This size may increase with future releases. On first use, downloading all the files may take a while on a slow network. In subsequent updates, only changed files will be downloaded.

# Configuring AppSuite synchronization

With the right configuration, any issues that may occur during the synchronization between the AppSuite app (field engineers) and Planon ProCenter (the back-office) can be monitored and processed in the **Background actions** TSI.

Synchronization between the devices using Planon AppSuite and *Planon ProCenter* takes place as a background action. All transactions on the app that need to be sent to the back-office are channeled via the app's **outbox** on the mobile device to the **AppSuite inbox** in **Background actions**. If synchronization fails for some of these actions, these will be listed as *completed with errors* and they can be queued for a retry.

- Application managers can 'repair' failing background actions by updating / correcting relevant data in the back-office (Planon ProCenter).
- If an AppSuite background action with errors cannot be resolved by the above method, please contact Planon Support. They can fix failing background actions by changing the content of the message received from the device. In addition, they will investigate the problem and create a ticket if a software fix is required.

Examples of synchronization problems are:

- Authorization issues: field engineers may not have the correct access rights.
- Validation issues: mandatory fields that are not populated.
- Configuration issues: status transitions were incorrectly configured.



For more information on monitoring and solving issues via **Background actions**, see the Supporting data > Background actions user documentation.

For the process to work properly, configure the following:

- In the **Background actions** TSI, add the **AppSuite inbox** selection step (system name AppMan\_Nova\_BackgroundAction).
- In the **Scheduled tasks** TSI, configure and activate the SYSNOVA\_PMFS\_CHECKER scheduled task. The **AppSuite inbox** requires this scheduled task to check failing background actions and retry them. Failing background actions will automatically be picked up. Processing and retrying takes place as follows:
  - Background actions related to the same order are synchronized *in sequence*. The scheduled task will pick up the background actions of a single order one by one. Depending on your **Schedule** settings, the scheduled task will run every 'x'

minutes, so it may take some time to process all background actions of a single order. The default setting is every 5 minutes.

- Background actions of different orders are processed *in parallel*.
- In the **Scheduled tasks** TSI, the  
SYSBACKGROUND\_ACTION\_CLEANER scheduled task,  
automatically removes inbox messages older than 7 days.



The Background actions > AppSuite inbox replaces the Planon **Error gadget** and the **AppSuite logs** TSI.

## User and team configuration

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Configuring users for Planon AppSuite - Field Services  
Blocking a user and retracting data from the device  
Configuring teams

---

## Configuring users for Planon AppSuite - Field Services

Use the following procedure to enable sending jobs to **Field Services > My jobs** on a mobile device:

### Procedure

1. Go to Authorization > User groups.
2. Make sure all users of the Field Services > My jobs app are linked to a relevant user group and user account.
3. At User groups > Users group details > Settings, specify a language for these users.

### Warning

Do not populate the **Device ID** user field, since it is related to the previous generation PMFS app, which is based on a different technology. Populating this field will even obstruct the use of the new **Field Services** app.

4. At Product definitions, link the relevant user group(s) to the relevant PMFS product definition.

See [Required product definitions](#).

### Tip

For more information on working with user groups and function profiles, see the *Authorization* user documentation.

AppSuite users must be authorized to:

- edit orders [any relevant user-defined variants of BaseOrder]
- edit work assignments [system name:WorkAssignment]
- create orders (requests / suborders) [any relevant user-defined variants of BaseOrder]
- make status changes for orders [any relevant user-defined variants of BaseOrder]
- make status changes for work assignments [system name:WorkAssignment]
- add man-hours [system name: OrderHours]
- add / edit order lines [system name: OrderLine]
- add / edit materials lines [system name: CatalogueItemRequestLine]
- add communication logs on orders [any relevant user-defined variants of CommunicationLog]
- add / edit issuings [system name: Issue]
- add / edit stock transfers [system name: StockTransfer]
- read personnel data (to retrieve man-hour tariffs) [any relevant user-defined variants of Person]
- read property data [any relevant user-defined variants of Property]
- read space data [any relevant user-defined variants of Space]
- read asset data [any relevant user-defined variants of BaseAsset]
- read communication logs (photos and documents) [any relevant user-defined variants of CommunicationLog]

- read hazard information [system name: Hazard]
- read maintenance teams [system name: Teams]

**Note**

Provided that your security settings permit it and under the condition that none of the PMFS AppSuite users have access to any navigation panel in , you can opt for a simpler and quicker user group authorization, by creating a new AppSuite user group for field engineers with **Full functionality** rights.

## Blocking a user and retracting data from the device

In exceptional cases, the back-office may need to retract all data from an engineer's device and block access to all modules. For example, if it is required that field engineers uninstall and reinstall the app. In such cases, it is vital that all job data is first sent from the device to the back-office to prevent data loss. Later, the job data is re-assigned, so that the field engineers can proceed with their work once they install the AppSuite app again.

### Procedure

1. Go to the User groups TSI and select the user group of the field engineer(s) whose data must be retracted.
2. Go to User group details > Users and select the user whose data you want to retract.
3. Go to the Settings step.
4. In the Block AppSuite user & retract all data from device? field, select Yes.

**All jobs are retracted from the device of the selected engineer and access to the modules is blocked. The jobs from the devices are re-assigned to the respective field engineers. During the log-in or synchronization in the AppSuite app, it is detected when a field engineer is blocked and the data must be sent to the back-office.**

### Note

Provided the device has an *internet connection*, the retraction progress is indicated on screen by a 'spinning wheel'. When the spinning stops, the data has been retracted from the device. Supervisors can check in **Background actions** which communications have taken place.



## Configuring teams

For maintenance team registration in Resource Planner and apps, such as Planon AppSuite and PMFS Live app , a separate **Maintenance teams** TSI is available. Teams can be registered on the first level of the TSI. On the second level you can link team members to the team.

### Tip

For information about creating project teams for the **Projects** and **Transactions** TSIs, refer to [Project team](#).

### Procedure

1. Navigate to **Web client > Navigation panel** and add the Maintenance teams TSI to the relevant navigation panel(s).
2. In Field definer , on the Personnel business object, enable the Team field.

### Note

It is recommended to create a dedicated user-defined business object under **Personnel**, for example **PMFS team**. This user-defined business object will help you quickly find the personnel record that is used to identify a team. It also allows you to use a *separate layout* that includes the **Team** field. If the **Team** field is populated on a personnel record, the 'person' represents a team. When this 'team person' is filled in as internal tradesperson on an order, the order will be sent to mobile devices as a team order.

3. In **Layouts**, add the **Team** field to the layout of the new user-defined business object and enable authorization.
4. In the Maintenance teams TSI, add a maintenance team.
5. On the second level, add team members (= Role players) to the team (for example, people who are linked to the Role of *maintenance engineer*).
6. Navigate to the Personnel TSI and add a new 'person'.

### Note

This is not an actual person, but a **Personnel** record *representing* the maintenance team.

7. Link this 'Team' person to the new team. The record is used to represent the team when assigning team orders.

# BIM settings (AppSuite-specific)

Planon AppSuite supports the display of a BIM model in a viewer.


 As of release L89, working with *multiple* BIM model types is supported, via BIM model type categories. Customers who were already working with BIM models in AppSuite will find that their previous BIM setting is converted to **BIM model type category** and that the existing BIM model setting is preserved.

In the **Properties** module you can view every BIM model type that is related to the property.

In **My jobs** and in **Assets** you can only view one BIM model type. Which model type that is, will be based on the **BIM model category** (as selected in the settings), on the current time and on the lowest available system code.

## Making BIM settings

1. Select AppSuite on the navigation panel.
2. For the **My jobs** BIM setting, go to Order settings.
  1. Select the relevant **Field Services** PSS definition on the elements panel.
  1. Select the **Planon AppSuite - Field Services** selection step.
  2. On the data panel, select the **BIM** tab.
  3. In the **BIM model type category** field, select the relevant BIM model type category in the pop-up.
  4. On the action panel, click **Save**.
3. For the **Assets** BIM setting go to Asset settings.
  1. Go to AppSuite > Asset settings on the navigation panel.
  2. Select the relevant **Assets** PSS definition on the elements panel.
  3. On the data panel, select the **BIM** tab.
  4. In the **BIM model type category** field, select the relevant BIM model type category in the pop-up.
  5. On the action panel, click **Save**.

 AppSuite only supports BIM model types with a PATH to an SVF file.

 For information about preparing and configuring BIM viewer, see [BIM viewer](#) and [Configuring BIM viewer for AppSuite](#) in the WebHelp.

# Configuring My jobs - Order settings

There are quite a few order settings that can be made for the PMFS solution. Many of these settings help you manage *what* is displayed on the field engineers' mobile devices and *how* it is displayed. Other order settings have bearing on information that is sent to the back-office.

For information on how to configure property set dependent order settings, see [Property set dependent PMFS order settings](#).

For information on how to configure non-property set dependent order settings, see [Non-property set dependent PMFS order settings](#).



For information on the configuration of PMFS specific **Actions** and **Reasons** and their link to order status transitions, refer to [Action and reason configuration \(MM and PMFS\)](#).

## Property set dependent PMFS order settings

### Prerequisite

Property set dependent order settings for PMFS must be made separately per *property set*. In a Planon Accelerator environment, the order settings can be made in AppSuite > Order settings > Mobile Field Services. In a non-Accelerator environment, you can do this in Web Configuration (see the procedure below).

**Note** Once you have configured PMFS order settings in one property set, you can export / import these settings to / from other property sets.

### Procedure

1. In Planon ProCenter, add the Web Configuration TSI (system name: PSSManager) to your navigation panel.
2. Make sure you add the Mobile Field Services [PSSMobileFieldServices\_Step] selection step to the TSI.
3. Go to the TSI via your navigation panel and add a site, or use an existing site.
4. Go to the Mobile Field Services step to configure PMFS settings.

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- Main
- Mobile actions
- EHS
- Meter readings
- Order type
- Free mobile fields
- Report issue
- Add suborder
- Search for stock
- Real-time updates - implications

---

## Main

### Field

#### Code

### Description

Enter a code for the PMFS setting.

**Note:** If you work with multiple property sets, for example for different countries, it is recommended to select a code that is unique within the property set(s) involved. The unique code will make it possible to provide field engineers with multiple Add-order URLs on their device.

#### Description

Enter a name for the setting.

#### Order date-time

Specify the date-time field by which the orders are sorted on the device.

#### Planning information

Select the planning information you want to display in the job list:

- Start date-time
- Start & end date-time

#### Sign-off required

Select one of the following signing off options: **Always on:** a sign-off is always required on the job.

**Always off:** a sign-off is never required on the job.

**Sign-off required:** the value in the **Sign-off required** field *on the (standard) order* is the trigger whether or not a sign off is required.

#### Engineer's sign-off

Select one of the following options:

**Always on:** engineer's sign-off is always required on the job.

**Always off:** engineer's sign-off is never required on the job (default setting).

**Sign-off required:** the value in the **Sign-off by engineer required?** field *on the (standard) order* is the trigger whether or not the engineer's sign-off is required.

#### Sign-off overview

Select the way the sign off overview must be displayed:

- as a *summary*. Basic job information, engineer's comments, labor hours, materials and, if configured,

Field	Description
	<p>fault handling observations and incomplete work.</p> <ul style="list-style-type: none"> <li>as a <i>comprehensive</i> overview, including the information from the summary and also asset information, questionnaires and all maintenance activities.</li> </ul>
Time registration	<p>Select a time registration method:</p> <ul style="list-style-type: none"> <li>Time tracking <p>Time registration is based on the start date-time and end date-times of the <b>Travel</b>, <b>Work</b> or <b>Wait</b> actions selected by the field engineer.</p> </li> <li>Number of hours <p>Time registration is based on the number of hours entered manually. The engineer provides the date and number of hours/minutes for <b>Travel</b>, <b>Work</b> or <b>Wait</b>. With this setting, AppSuite will not track the time between the start and end date-time of an action.</p> </li> </ul>
Refusal of sign-off allowed?	<p>Select <b>Yes</b> if you want users to be able to refuse signing for approval. A <b>Refuse</b> action is displayed on the app's sign-off screen.</p> <p>Users are required to give a reason for refusing to sign off. See <a href="#">Action and reason configuration (MM and PMFS)</a> for information on configuring action-reason combinations.</p> <p>Select <b>No</b> to disable this feature.</p>
Asset in job list?	<p>Select <b>Yes</b> if you want to show information on the linked asset in the job list. If no asset description exists, the asset code is displayed.</p>
Extend asset search?	<p>Select <b>Yes</b> to offer field engineers a choice to search assets within the property of the selected job or search assets within the entire building complex. If <b>No</b> is selected, engineers can only search assets in the property registered on the job.</p>

Field	Description
Add request online	<p>Select the Self-Service web definition that must be used to enable the online entering of service requests via the PMFS app. The web definition will enable field engineers to add new jobs online via their PMFS credentials.</p> <p><b>Tip</b> See Self-Service Configuration Guide &gt; Adding a service request definition for more information on creating a Service Request web definition.</p>
Use expected arrival date time?	<p><b>Yes:</b> a menu option is shown on the device where the user can update the expected arrival date time.</p> <p><b>No:</b> this option will not be available on the device.</p>
All questions of questionnaires in one screen?	<p><b>Yes:</b> all questions from all questionnaires of the order are displayed on the device in a single screen.</p> <p><b>No:</b> each questionnaire gets a separate screen.</p>
Communication log type for photos/sign-off	Define which user-defined type of the <b>Communication log</b> business object must be used to add photos + signatures.
Communication log type for comments	Define which user-defined type of the <b>Communication log</b> business object must be used to add comments by a tradesperson / engineer (if used in the <b>Tradesperson's comments</b> setting).
Communication log type for PMFS action	Define which user-defined type of the <b>Communication log</b> business object must be used to add PMFS actions.
Communication log type for internal notes	Define which user-defined type of the <b>Communication log</b> business object must be used for internal communication about a specific order / job between the back-office and a field engineer. This communication is displayed on the engineer's device as a 'chat', on the <b>Internal communication</b> summary block, on the maintenance activity summary and

## Field

## Description

on the **Internal communication** screen.  
See [Communication logs for internal communication](#).

**Note** Internal communication is related to the order, so the comments are stored in the order's communication log. It is not possible to have internal communication per maintenance activity.

Comment field

Define which comment field should be used to show additional information about the order on the device.

Tradesperson's comments

Define where the engineer's / tradesperson's comments must be logged in the back-office.

**Comlog**: in a communication log that is added to the order.

**Comment**: in the **Comment** field of the order.

**CommentString**: in the **Comments** field of the order.

**Note** In the last two options, the engineer's comments will be added to the existing content of the field with the engineer's name and a date-time stamp.

Telephone number field

Define which phone number field of the person should be used to send to the device as contact information.

Enable real-time updates?

## Warning

Important: Before enabling real-time updates in a production environment, make sure you functionally test your field services business processes in a test environment.  
Also see: [Real-time updates - implications](#) .

By setting this field to **Yes**, you allow that data added / changed by field engineers



## Field

## Description

is *instantly* updated in ProCenter, instead of when they end a job.

Field engineers will still have to synchronize their devices manually, because no data is pushed from the back-office to the mobile devices. The app's **Synchronize** action will update all job data on the device with the latest back-office data.

Real-time updates ensure that both back-office and field engineers work with accurate job data. As data is continuously synchronized, this will have a minor effect on the performance. Also, some features behave differently when real-time updates are enabled. See for example: [Configuring labor hour registration](#).

Should conflicts arise due to changes to the same job data in both ProCenter and AppSuite, which cannot be resolved, the **Synchronization** background action will fail. These issues must be resolved manually by an application manager.

Enable maintenance activity comments?

Setting that allows engineers to enter comments on individual maintenance activities rather than on the whole job (order). These comments are stored as communication logs on maintenance activities. If you select **Yes** in this field, the app displays a **Comments (activity)** card on each maintenance activity and no longer displays the generic **Comments (job)** card. The setting does not work retroactively.

Activate debug logging

Select the appropriate method for debug logging: **Always on**, **Always off** or **Device -specific**. The device-specific option allows individual field engineers to activate debug communication logs (snapshots) via their device settings.

**Important:** only activate this setting at the request of Planon Support! When set to **Always on** or **Device-specific**, the setting will start logging user actions and job synchronization moments *on the device as a snapshot in JSON format*, and

## Field

## Description

then send it to the back-office. The information is stored as **Debug snapshot** (Order - communication log). The back-office can use the debug snapshots to compare job data on the device with back-office information and to analyze synchronization problems.

Logging level for debug snapshot

If you activate debug logging (see previous row), you can select the level on which debugging communication logs must be created:

- Full - all job data is included in the debug snapshot, except images.
- Labor only - only labor hour related data is included in the snapshot.

Additional settings

This is a placeholder for additional settings provided by Planon.

## Mobile actions

On-hold enabled?	<p><b>Yes:</b> there will be an option to put the job on hold on the device.</p> <p><b>No:</b> there will not be an option to put the job on hold on the device.</p>
Display order line materials?	<p><b>Yes:</b> enable the display of required materials on the mobile device. These are taken over from the order lines and likely to be needed to execute the order. This feature also enables engineers to register the actual use of materials.</p> <p><b>No:</b> disable this feature.</p>
Allow addition of material costs?	<p><b>Yes:</b> engineers are allowed to specify costs for used or requested materials. Typically, these are costs for items / materials that had to be purchased separately, because they were not planned for or were unavailable in the (mobile) store. In ProCenter (back-office), the costs will be shown in the <b>Price excl. VAT / tax</b> field on Order lines / Requisition lines.</p> <p><b>No:</b> disable this feature.</p>
Log asset code?	<p><b>Yes:</b> enable sending scanned asset bar codes from the PMFS app to the back-office, via a communication log.</p> <p><b>No:</b> disable this feature.</p>
Prevent overlaps in time registration	<p><b>Always:</b> prevents field engineers from registering overlapping labor hours <i>per individual job</i>, for all job types.</p> <p><b>Only for service agreement services:</b> only prevents the registration of overlapping labor hours <i>per individual job</i> for <b>service agreement services</b> (Service Providers solution).</p> <div><p><b>Note</b> Regardless of which option you select, the system will not prevent overlapping across multiple jobs.</p></div>
Allow time registration for externals?	<p><b>Yes:</b> enable labor hour registration of external staff. Field engineers can manually register labor hours for externals.</p> <p><b>No:</b> disable labor hour registration of external staff.</p>

Reassigning allowed?

**Yes:** make it possible for an engineer to directly reassign a job, , instead of returning it to the back-office for reassigning. The **Reassign** action is displayed on the device as soon as a job is accepted. Only jobs that are in progress (Work, Travel, Wait and Pause actions) can be reassigned. Engineers are required to give a reason for reassigning the job. See [Action and reason configuration \(MM and PMFS\)](#) for information on configuring action-reason combinations.

**No:** disable this feature.

Display faults & incomplete work?

**Yes:** enable the display of faults and incomplete work on the mobile device when signing off. So, if there are checklist items on a maintenance activity that were assessed with an observation or not assessed at all, they are listed on the **Sign-off** screen. This setting only applies to the summary view of the **Sign-off** screen. In the comprehensive view all maintenance activities are listed. See [Main](#) for information on the **Sign-off overview** setting.

**No:** disable this feature.

## EHS

For more info see the chapter Environmental Health and Safety Check.

### General EHS settings

EHS check required

**Always on:** The health & safety check will always appear on the device.

**Always off:** The health & safety check will never appear on the device.

**EHS required:** the value in the **EHS required?** field on the order determines if the health & safety check is displayed on the device, or not.

**Note:** If you select **Always on** or **Always off**, these settings will override the setting in the **EHS required?** field on the order. If you select the **EHS required** option, the selection on orders is considered.

Acknowledgment interval EHS wizard (in min.)

Specify the interval in minutes after which the EHS wizard must be displayed again, after a user has temporarily interrupted a job (**Pause**, **Travel** or **Wait**).

Show EHS card?

Select **Yes** to display the health and safety summary card in the Planon AppSuite. This card briefly displays the essential information on permits, method statements and hazards related to the job.

### Health & safety fields related to *solution extensions*

Permit canceled status

System name of the **Canceled** status of the **Permit** business object.

Method statement field

On the order, a free field must be configured as a picklist which contains the method statement for the EHS check.

Risk assessment

On the order, a free field must be configured as a picklist which contains the risk assessment for the EHS check.

Additional risk assessment field

On the order, a free field should be configured as a picklist which contains the additional risk assessment for the EHS check.

Asbestos type

On the space a string field can be configured to define the asbestos type for the EHS check. Select that field here.

## **Meter readings**

Counter reading type

Specify to which user-defined business object counter readings can be added that were registered on the device.

Gauge reading type

Specify to which user-defined business object gauge readings can be added that were registered on the device.

## Order type

User-defined business objects

Define which user-defined order(s) should be used in Planon AppSuite (**My jobs** and **Service Requests** modules).



## Free mobile fields

Most of the app's content cannot be configured. However, you can configure some additional order fields to be displayed on the general information screen or the additional information screen.

**Note** Some **Free mobile fields** require that corresponding free fields are first configured on the **Orders** business object in the Field definer TSI. This must be done for the relevant field types (for example *picklist*, *URL*, *reference* etc.). Example: if you want to configure Free mobile URL fields, a free string field of **Orders** must first be set to **In use** in Field definer and configured as a URL field type. Then the field will become available in the pop-up of the **URL** fields [1-5] in AppSuite > Order settings. See the *Field definer* user documentation for more information on configuring free fields.

The following free mobile field types are supported:

Drop-down list field 1 - 5 [PICKLIST\_FIELD1-5]

Five free fields are available that can be configured as a **Code/Descriptive picklist** on the order.

Display value

For each picklist field you can select which display value should be used to be shown on the device.

**Code:** only the code of the picklist is shown

**Name:** only the name of the picklist is shown

**Code+name:** both code and name of the picklist are shown

Date-time field 1 - 2 [DATETIME\_FIELD1-2]

System date-time fields and free date-time fields are allowed here.

Using a free field that is converted to a date-time field will not work.

Text field 1 - 5 [TEXT\_FIELD1-5]

String or Freestring fields are allowed.

So if the Freestring is configured as a reference field this will not work.

Boolean field 1 - 3 [BOOLEAN\_FIELD1-3]

Select a Boolean field to be displayed on the general / additional information screen.

Reference field 1 - 5 [REFERENCE\_FIELD1-5]

You can use the following types of reference fields:

Fixed reference field (e.g. InventoryItemRef)

FreeInteger field that is used as a reference field.

**Known issue:** there are more fields listed than actually allowed, so make sure you pick a field that meets the criteria mentioned above.

Referred BO field name

For the selected business object, enter the name of the field that you want to have displayed. Only the names of text fields (type String or Freestring) are allowed as display value.

Long text field [LONGTEXT\_FIELD]

Only fields on the **Orders** business object are allowed. They must be of the **Extended string** field type.

URL field 1 - 5 [URL\_FIELD1-5]

**Note** AppSuite only!

Select the URL field that you want to display on the general / additional information screen. The fields offered in the pop-up are free fields from the **Orders** business object that have been configured as URL fields.

On the app, end users can click on the URL field to open the URL in the 'in-app' browser or in an external browser. Also see the general setting **Open URLs in external browser?:** [General settings - fields](#)

The fixed sequence of the fields displayed on the device:

1. PICKLIST\_FIELD1 - PICKLIST\_FIELD5
2. DATETIME\_FIELD1 - DATETIME\_FIELD2
3. REFERENCE\_FIELD1- REFERENCE\_FIELD5
4. TEXT\_FIELD1 - TEXT\_FIELD5
5. LONGTEXT\_FIELD (next screen)
6. BOOLEAN\_FIELD1 - BOOLEAN\_FIELD3
7. URL\_FIELD1 - URL\_FIELD5

## Report issue

### Field

### Description

Add request offline

Select **Yes** to enable the offline creation of service requests (based on standard requests). Field engineers will be able to add new service requests on their mobile devices in areas where online communication is impossible or prohibited. The new request(s) will be sent to the back-office at the earliest opportunity. The time interval for sending the request(s) depends on your settings.

Standard requests

Select the standard request(s) to be used as 'template' for offline order reporting on the mobile devices of the field engineers.

## Add suborder

You can make a setting that allows field engineers to add additional suborders. You can also specify which **standard orders** should be used as basis for adding additional suborders.

### Field

### Description

Add suborder

Select one of the following options to allow field engineers to add additional suborders, based on a standard order:

**Add:** allows them to just add additional suborders.

**Add and pick up:** allows them to add suborders and pick up the job immediately. By default, this option is set to **Deactivated**.

**Note:** If you want to use the **Add and pick up** option, a status transition from the default status to the **Assigned** status must be available on the relevant standard order types. For example from **Reported** to **Assigned**.

Additional standard orders

Select the standard order(s) that can be used as 'templates' for additional, suborder reporting on the mobile devices of the field engineers.

**Note:** Field engineers may be offered more suborders than the ones that are configured here. Which suborders are shown, will vary and depends on which *standard order with suborders* was used to create the job that the engineer is working on.

## Search for stock

### Field

Display stock offline?

### Description

Select **Yes** to enable the offline display of stock items. Field engineers will be able to search for and filter out stock items on their mobile device while being offline.

## Real-time updates - implications

Before you activate real-time updates in AppSuite (see [Main](#) to locate the setting), there are some implications regarding app behavior and minor functional limitations that you should consider.

If you activate real-time updates the following applies:

### Limitations

- Job data added / changed on the mobile device is directly sent to the back-office. Job data from the back-office is not pushed to / automatically updated on the device. The job data changed at the back-office is only updated on the device after manual synchronization by the field engineer.
- The field engineer's / tradesperson's comment is only synchronized if it is configured as **Communication log**, instead of a **Comment** field or **CommentString** field. Comment and CommentString are not synchronized by real-time updates. Only if a job is ended will the comment be inserted into the Comment or CommentString field.
- Added meter readings cannot be edited.
- Requested materials cannot be edited.
- Decreasing the used quantity for stock products will not be synchronized. Only if a *key job* is ended will the material returns be registered at the back-office.
- Field engineers can only edit / delete job data they added themselves.
- Pending changes from the field engineer's side will overwrite back-office changes.
- Back-office changes will only be updated on the device if there are no changes pending from the field engineer.

### Changes in app behavior

- **Quantity** on Materials does not have **+**, **&**, **-** buttons, only an **Edit** button to change quantities via a pop-up.
- **Quantity** on Requested materials is not editable.
- Requested materials cannot be deleted.
- Users cannot increase the quantity of used materials for the mobile store. They must add new requisition lines instead.
- Users cannot remove used materials from the mobile store, nor set the quantity to zero.
- Labor hours created by a field engineer are editable until they are finalized.
- Finalizing on **Pause** will set the **Finalized?** field on **Labor hours** to **Yes** (ProCenter / back-office). See [Configuring labor hour registration](#).
- Photos from the back-office that were originally created by the field engineer, will be editable by the field engineer.
- Completed maintenance activities will be hidden after manual synchronization.
- After a maintenance activity is set to **Done**, a warning is shown that all checklist items will be set to **Done** as well. If the warning is approved, the maintenance activity becomes read-only. Upon synchronization all completed maintenance activities will be removed from the list of pending maintenance activities.

## Non-property set dependent PMFS order settings

Non-property set dependent order settings for PMFS can be made in AppSuite > PMFS system settings.

### Procedure

1. Go to AppSuite > PMFS system settings to add non-property set related PMFS system settings.
2. Make the relevant settings. See PMFS system setting - Allow working on multiple jobs simultaneously.

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PMFS system setting - Allow working on multiple jobs simultaneously

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PMFS system setting - Allow working on multiple jobs simultaneously

Field	Description
Allow work on simultaneous jobs?	Select <b>Yes</b> if you want to allow an engineer to set multiple jobs to <b>In progress</b> simultaneously. If you select <b>No</b> , only one job is allowed to be <b>In progress</b> per engineer. Their other job(s) must be set to <b>Pause</b> .


## Displaying high priority orders and appointment bookings in My jobs

As application manager, you can enable back-end staff to mark orders as **High priority** and/or **Appointment booking**. This information is sent to the field engineers, so they pick up jobs accordingly. The fields listed below can be configured on the layout of the (standard) order.

 See the **Layouts** user documentation and **Work Orders** user documentation for more information.

The following table shows the fields in Work Orders > **Order data fields** where the relevant settings can be made.

PMFS fields on orders

Appointment booking?	<p>Click <b>Yes</b> if the PMFS order must appear as an appointment booking on the mobile device of the field engineer (internal tradesperson). Once the order is made into an appointment booking, it has a fixed start date. Field engineers can recognize appointment bookings by their icon in the Planon AppSuite app: </p> <p>The default setting in this field is <b>No</b> (no fixed start date).</p>
High priority?	<p>Click <b>Yes</b> if the PMFS order must appear as a high priority order on the mobile device of the field engineer (internal tradesperson). Field engineers can recognize high priority</p>



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## PMFS fields on orders

orders by their icon in the Planon

AppSuite app:



The default setting in this field is **No** (no high priority).



It is possible to make an order both a high priority order *and* an appointment booking, by setting both fields to **Yes**. In that case, the PMFS order on the field engineer's mobile device is marked by both icons.

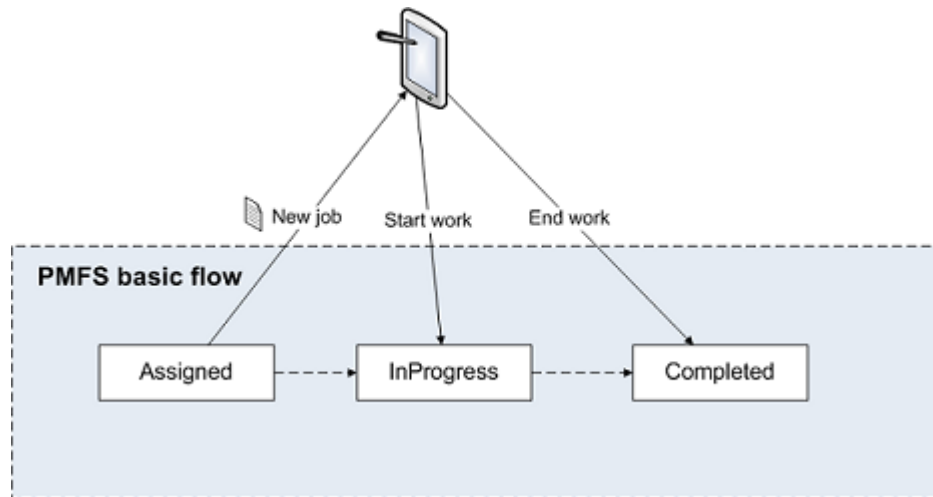
---

Workflow configuration - status mapping  
Removing a job from device and reassigning

---

## Workflow configuration - status mapping

The following image illustrates a basic job workflow in the Planon AppSuite app > **My jobs** module. A job is displayed in the app when it is assigned to the logged on user.



**Note** Up to Planon Live version L47, the jobs displayed on the app originated from work orders or PPM orders that the back-office assigned to a field engineer. An order in the back-office and a job on the device coincided. However, as of Planon Live version L47, a *work assignment* is automatically created for each order (PPM order or reactive work order). Each order has one work assignment and their statuses are kept completely in sync: this is called *1:1 planning*. The status of the work assignment is kept in sync with the corresponding job in **My jobs** on the mobile device.

As long as you do not upgrade to using **Multiple work assignments** (*1:n planning*), the following user-defined order statuses can be configured on the Field definer > Orders > Business object settings > Status mapping tab:

- **Assigned**: displays the order's associated work assignment on the mobile device of the engineer.
- **In progress**: if the engineer presses **Start work** on the device, the order is set to the configured **In progress** status.
- **Completed**: if the engineer completes the work on the device, the order is set to the configured **Completed** status.

It is important that there are valid status transitions from:

- the **Assigned** status to the **In progress** status.
- the **In progress** status to the **Completed** status.

### Warning

For customers upgrading to the use of **Multiple work assignments** (*Work Assignments* feature switch + *Resource Planner Pro* license), it is recommended to revise any existing status transitions between user-defined order statuses. For example: if you have an order status flow from **Accepted** > **Assigned** > **In progress**, the

**Assigned** order status is no longer synchronized once multiple work assignments are involved. The order status gets 'left behind' at **Accepted**, even if a work assignment is put in progress. The reason is that there is no status transition from **Accepted** to **In progress**. To save yourself the trouble having to manually update each order status to **Assigned** whilst planning, you can configure a status transition from **Accepted** to **In progress**. For more information on switching to work assignments and its implications, see [Work assignments](#) user documentation.

### Tip

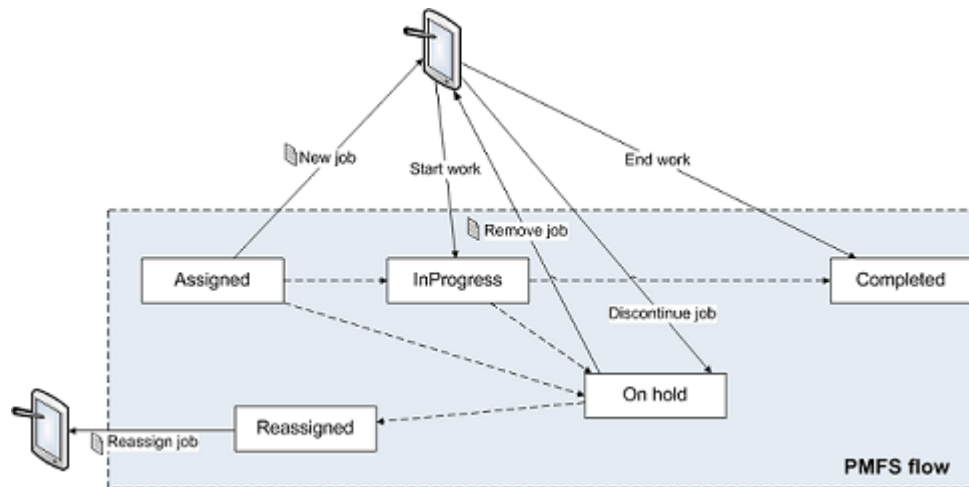
- See *Basic Data Management > MM & PMFS configuration* for information on configuring PMFS actions and reasons and linking them to **Order** statuses.
- See *SLA Management > SLA Management in PMFS*, for information on specific order configuration for SLA compliance.

## Removing a job from device and reassigning

In Planon AppSuite, jobs can be removed from the mobile device and reassigned to other tradespersons / field engineers.

There are two ways to remove an order from the mobile device by setting it **On hold**:

- In Planon: this will result in the removal of the job from the mobile device.
- On the device itself: if the engineer presses **Discontinue job** the job is removed from the device.



**Note** The **Assigned** status and **In progress** statuses must have a status transition to **On hold**.

### Warning

An upgrade to Planon Live L47 or higher will have implications on the status flow for reassigning jobs, due to the introduction of *work assignments*. Even if you do not switch to using multiple work assignments (Resource Planner Pro license and Work assignments feature switch), the status mapping will change. For more information, see .

# Taking over contract line settings to an order

Due to contractual obligations, it may be required to have a set of order settings for one customer, such as a job sign-off procedure, which does not necessarily apply to the other customers. In that case, you can make sign-off settings and other customer-related order settings on the *contract line*.

Sign-off settings and other customer-related settings are usually configured on a standard order and apply to *all* orders that are based on this standard order, for all customers and engineers alike. If you want to differentiate these settings per order, you could create various standard orders. However, you may prefer to configure sign-off settings and other settings on the linked *contract line*, which will be taken over to the order.


The fields for sign-off settings are:

- Sign-off required?
- Sign-off by engineer required?

Additional fields with important job information that can be configured on the contract line are:

- Appointment booking?
- High priority?
- EHS required?

If you configure these settings on the contract line, you can apply them directly to the orders you create for this contract line. When such orders (or their work assignment(s)) are subsequently sent to a mobile device, the job information will contain the settings from the contract line, provided that they were not changed on the order.

 It is possible to **edit** the sign-off / job settings on the order. If you change settings from **Yes** to **No** on the order, you will be warned that there is a difference with the settings on the linked contract line. You can continue with your changes if required. Changing settings from **No** to **Yes** will proceed without a warning. If you change the reference to the contract line on the order layout, only settings of the contract that are set to **Yes** will be taken over to the order.

## Procedure

1. Go to the **Layouts** TSI.
2. At All business objects, select the Contract lines business object or one of its subtypes.

3. At Layouts, select the relevant layout and set it under construction by clicking the padlock icon.
4. Add the required fields (settings) to the layout. See the *Layouts* documentation to find out how you can add fields to a layout: .
5. Click Save.
6. At All business objects, set the business object to Completed.

**The fields are now available on the selected layout of the contract lines and can be set to Yes or No by a contract manager. When creating orders for these contract lines, the set values are copied to the order and subsequently to the job(s) assigned to the field engineers.**

# Configuring labor hour registration

Labor hours are by default only finalized and synchronized with the back-office if an engineer selects the **Temporary fix**, **Discontinue** or **Completed** action on the app. However, you may want to allow finalizing the worked labor hours before a job is actually completed. For example, if engineers do not manage to finish their job before the end of the working day and want to continue working on the same job the next day. For such cases, you can configure exceptions to the rule, by allowing finalization of already worked labor hours and synchronization with the back-office.

To configure this, you use the **Pause** action in the **PMFS action configuration** TSI. However, because **Pause** actions should not always lead to a labor hour finalization, you must indicate per **Pause** action - reason combination, whether this combination should trigger a finalized time registration at the back-office. The following table shows an example of time registration configuration for the **Pause** action:

Action	Reason	Finalize time registration?
Pause	End of working day	Yes
Pause	Break / lunch	No / Not applicable

See [Action and reason configuration \(MM and PMFS\)](#) for more information on action and reason configuration.



By default, the **Finalize time registration?** setting is set to **No / not applicable** for all actions. It can only be set to **Yes** for the **Pause** action.



If you have the **Real-time updates?** setting enabled for AppSuite (see [Main](#)), the behavior of **Finalize time registration?** on the **Pause** action is different, because labor hours will be sent to the back-office as soon as they are created and not just on clicking **Pause**. With real-time updates enabled, it is recommended to configure the **Finalized?** field on the **Labor hours** layout in the Work Orders TSI. When the engineer selects the **Pause** action, this field will be set to **Yes**, to inform the back-office that the labor hours are now really finalized. The finalized labor hours become read-only on the AppSuite app. In ProCenter (the back-office), these labor hours will not become read-only by default. If required in your specific configuration, for example because a synchronization must be triggered with an external system, you can apply authorization to make the labor hours read-only.





# SLA configuration

Field Services is fully compliant with Service Level Agreements in Planon ProCenter .

The engineers using the app are able to select actions in the mobile workflow that correspond with the following KPIs in Service Level Agreements :

- Time to Attend (TTA)
- Time to Fix (TTF)
- Time to Complete (TTC)

 For more information on configuring SLA KPIs in Planon ProCenter , refer to Service Level Agreements .

 Time to Attend and Time to Fix can only be configured for **Reactive orders**.

The KPIs are automatically set off, if an engineer selects a corresponding action on the job menu.

- **Start work**: sets the actual time to attend (TTA)
- **Temporary fix**: sets the actual time to fix (TTF)
- **End work**: sets the actual time to complete (TTC)

PMFS also supports 'Stop the clock' in Service Level Agreements . This means that the various SLA KPIs are not affected in case order completion is prevented by a situation caused by the customer. 'Stop the clock' is triggered if an engineer selects an action and a corresponding reason that stop the work, such as **Wait**, **Pause**, **Discontinue** and **Decline EHS check**.

 For more information on configuring the PMFS actions and reasons that support 'stop the clock' in PMFS, refer to *Supporting data > MM & PMFS configuration*.

## Environmental Health and Safety check

A health and safety (EHS) check can be added to an order. If configured on the order, the engineer will be presented with a **Environmental Health and Safety check** screen / wizard. See [EHS](#) for information on the settings.

The EHS check can consist of:

- Risk assessments
- Method statements
- Permits to work

Based on this information, health and safety checks can either be accepted or rejected.

It is also possible to configure a compulsory *Last minute risk assessment* (LMRA) on the EHS check. This LMRA is included in the EHS wizard and field engineers will be required to answer the risk assessment questions that are displayed before they are allowed to start work. You can configure 'blocking' answer options that will prevent the job from being picked up / resumed for safety reasons. In Planon, the configuration of last minute risk assessments is based on a questionnaire. See [Configuring a 'Last minute risk assessment' questionnaire](#) for more information.

**Note** Planon Live provides a complete **Health and safety** solution that fully integrates with Planon AppSuite. Users who have implemented Planon *solution extensions* for health and safety can continue to use these during a transition period. They will be notified well in advance of the expiry date.

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Permits to work

Configuring risk assessments (configured solution)

Configuring method statements (configured solution)

Configuring a 'Last minute risk assessment' questionnaire

---

## Permits to work

Planon AppSuite supports two types of permits to work:

### Permits created by a solution extension (SX)

In a standard Accelerator configuration, permits to work are added as sub-orders to the main work order.

To use the PMFS permit functionality in a non-Accelerator configuration, a user-defined business object of system type WorkOrder should be created that represents Work permits. The new business object can have any workflow defined, but it must include a **Canceled** status.

### Permits created in the Permits TSI

In Planon Live (as of version L78 and higher), you can create permits to work in *Planon ProCenter*, in a dedicated **Permits** TSI. The TSI also allows for setting up a process to have permits generated automatically, for orders created by the back-office. For information on configuring this type of permit in *Planon ProCenter*, see the [Permits](#) entry in the Planon WebHelp.

### Warning

Although both types of permit can be used and displayed alongside one another in Planon AppSuite, it is highly recommended to start using the **Permits** TSI to create permits. The SX variant will be phased out in the near future and cannot be used for any newly developed Planon solutions.

## Configuring risk assessments (configured solution)

### Warning

Planon Live *Accelerator* includes a pre-configured Health & safety solution with its own TSIs. This chapter describes the old configuration method that was based on a solution extension. New adopters are recommended to use the pre-configured Health & safety solution as configured in *Accelerator*.

Risk assessments are defined as a picklist. The picklist must be linked to a field on a relevant order type. If a value is entered on the order, the risk assessment will be displayed on the H&S screen of the device.

### Procedure

1. Create a Code descriptive picklist for the risk assessment.
2. Enable a field on the relevant order types and link this field to the picklist. The field must be of the Freestring type.
3. At PMFS settings, select the field added in step 2 in the Risk assessment field.
4. Configure a picklist with reasons for rejecting the EHS check on the device.
5. At PMFS settings, in the EHS reject reason field (picklist), enter the name of the picklist.
6. It is also possible to send out additional risk assessments. The difference with a normal risk assessment is that additional risks assessments are not pre-defined.
7. Open the Field definer TSI and find the Orders business object.
8. Set the Orders business object to the Under construction status.
9. Set an available free field to In use, set the type to Picklists code descriptive (CodesCodeName), link it to a YES/NO picklist and give it a translated name under **Translated business object** detail.
10. Set the Orders business object status to Completed.

## Configuring method statements (configured solution)

### Warning

Planon Live *Accelerator* includes a pre-configured Health & safety solution with its own TSIs. This chapter describes the old configuration method that was based on a solution extension. New adopters are recommended to use the pre-configured Health & safety solution as configured in *Accelerator*.

Method statements work the same as risk assessments and are defined as a pick-list. The picklist must be linked to a field on the relevant order type. If a value is entered on the order, the method statement will be displayed on the H&S screen of the device.

### Procedure

1. Create a Code descriptive picklist for the method statement.
2. Enable a field on the relevant order types and link this to the picklist. The field must be a free field of the type Freestring.
3. At PMFS settings, select this field in the Method statement field.

## Configuring a 'Last minute risk assessment' questionnaire

You can make it compulsory for engineers to complete a **last minute risk assessment (LMRA)**, before they can start working on a job. If an EHS check is required for a job and the LMRA is included in the wizard, field engineers will be required to answer the risk assessment questions that are displayed. In Planon, the configuration of last minute risk assessments is based on a questionnaire.

The **Last minute risk assessment** concept links together a questionnaire, internal tradesperson (field engineer), order and several settings which will ensure that this generic assessment is always presented to the field engineers in the EHS wizard before they start / resume work. Subsequently, the answers entered by the engineer in the wizard are sent to the back-office and displayed on the Order subdetails > Answer lines selection step in Work Orders . This procedure explains how you can configure last minute risk assessments:

### Procedure

1. Go to the Questionnaires TSI.
2. Add a questionnaire with the relevant questions and answer options for the Last minute risk assessment.

### Tip

You can configure 'blocking' answer options that will prevent the job from being picked up / resumed for safety reasons. See the *Questionnaires > Answer option fields* documentation for more information on configuring mandatory questions and blocking answer options.

### Warning

Do not link an LMRA questionnaire to a standard order, because this would result in an incorrect work flow. If the back-office creates an order based on this standard order with linked LMRA questionnaire, field engineers are unable to receive an uncompleted LMRA questionnaire in the EHS wizard. Instead, the back-office staff would be required to answer the LMRA questionnaire, which is not intended for them.

3. In the Display of questionnaires in PMFS field, select the Last minute risk assessment option.
4. Go to AppSuite > Order settings.
5. Go to the EHS tab and select the relevant questionnaire in the LMRA questionnaire field.

**The LMRA questionnaire is included in the EHS wizard and shown on the mobile device just before an engineer starts the job. When the engineer fills in an LMRA questionnaire there are two possible outcomes. The engineer:**

- can *acknowledge* the filled out questionnaire and start the work
- has given answers that are *blocking* the start of the work and therefore has to *reject* the work

**By adding the following selection steps to the relevant layouts in the Work Orders TSI, you enable the back-office to receive the outcome of the LMRA and take the appropriate actions:**

- the **Last minute risk assessments** step at **Order details**
- the **Answer lines** step at **Order subdetails**

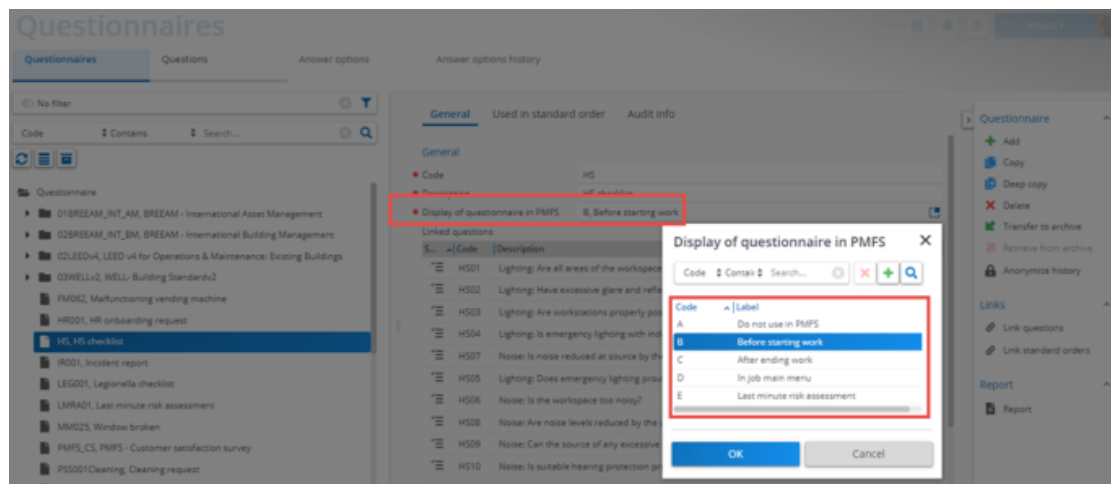
# Questionnaire configuration (AppSuite)

In **Planon AppSuite**, it is possible to display questionnaires on the mobile devices of field engineers. In the **Questionnaires** TSI, at the **Questionnaires** level, the **Display of questionnaires in PMFS** field allows you to determine *if, when and where* a questionnaire must be displayed on a PMFS mobile device. In this field, you can select one of the following settings:

- A - Do not use in PMFS
- B - Before starting work
- C - After ending work
- D - In job main menu
- E - Last minute risk assessment. See [Configuring a 'Last minute risk assessment' questionnaire](#).

**i** The above settings apply to Planon AppSuite only and not to other Planon mobile solutions. Option **E - Last minute risk assessment** can only be used for Planon AppSuite's **EHS wizard** and is presented in the EHS check before the engineer starts or resumes a job. You can configure so-called **blocking answer options** on multiple choice questions in the questionnaire. Blocking answers will prevent engineers from starting the job for their own safety, because a failing EHS check means they can only reject the job. It is also possible to configure **mandatory** questions for the field engineers. The LMRA answers are stored in the Work Orders TSI at **Order details**.

The following example shows a questionnaire (a checklist on health and safety) that is presented *before* an engineer starts a job.







For more information on working with questionnaires, see the *Questionnaires* documentation.



The maximum height of the **Sign-off** box (image) is limited to 10,500 pixels. If a job's **Sign-off** box contains many details, such as lengthy *questionnaires*, large numbers of activities, materials or labor hours, these may exceed the **Sign-off** image limit. As a consequence, the system will omit most of these details from the **Sign-off** image. However, basic job information and signature is always included in the sign-off image. Large comments will be limited to 2,000 characters.

# Configuring communication logs for file sharing

In order to share documents, photo's and other files with the field engineers using **Planon AppSuite**, you can configure communication logs on relevant business objects, such as *planned maintenance orders, reactive orders, assets* and so on.

## Communication logs for order data storage

In the app, the engineer can:

- perform actions such as **Temporary fix**, **Reassign**, **Wait**, **Pause** or **Discontinue**
- enter a reason for the selected action,
- take photos,
- add internal communication (chat messages); see [Communication logs for internal communication](#),
- add signatures.

This data is sent from the app to the back-office ( Planon ProCenter ) and stored in unique *communication log records* on the order. In AppSuite > Order settings on the **Main** tab, you can define which user-defined communication logs will be used for this purpose. See [Main](#).

### Configuring communication logs in ProCenter

Make sure that **Communication logs** selection steps are available on the following selection levels:

- Photos, actions or signatures added to a *job* are stored in the communication logs of the **Orders** business object. These communication logs are displayed on the **Order details** selection level in Work Orders .
- Photos added to a *maintenance activity* are stored in the communication logs of the maintenance activity. The communication logs of maintenance activities are displayed on the **Orders sub-details** selection level in Work Orders . Drill down as follows to go to that level: Orders > Maintenance activities > Order sub-details.

### Generating codes for communication logs

Since the *code* of the communication log is mandatory, make sure that the **Code** field of the communication log has a code generator on it:

1. Go to Field definer and put the Communication logs business object under construction.
2. Go to the Fields step and select the Code field. Enter an automatically generated mask in the Default value field. For example &CODEGEN(#####,F). This is mandatory in order to enforce that each communication log record is unique.
3. Put the business object to completed and press F9.

## Communication logs for order documents

If you want to make documents (maintenance manuals, technical drawings or photo's) available to field engineers on the AppSuite - My jobs > Documents information block, configure order communication logs, as follows:

### Procedure

1. In the *Layouts* TSI, make sure that the following fields are available on the relevant layout of Communication logs: Document reference and/or Document (secure).


 These fields will only support the following file formats: .PDF, JPEG, .JPG, .PNG.

2. If you want to allow external links to documentation on a website, make the URL field available on the layout.
3. If you want to share images via communication logs, make the Image field available on the layout.

 See the *Layouts* user documentation for more information of creating layouts.

4. In the *Work Orders* TSI, on the Order details > Communication logs - orders level, make sure that these fields are populated with the correct references / links to the documentation.

**On the app, references / links to (secure) documents are displayed in the Documents information block of the selected request or (sub)order. References to (secure) photos and to images are displayed on the Photos block.**


 To prevent (secure) documents and images from becoming inaccessible to app users after their user session has expired and their cache has been cleared, you can generate resource keys. See: System settings > [Security - Access to Planon features via encrypted keys](#).

## Communication logs for internal communication


If you want to set up internal communication between the field engineer and the back-office, in the form of a 'chat' functionality, follow the below procedure.

### Procedure

1. In Field Definer, create a user-defined communication log that must be used for internal communication.

 See Field Definer for information on creating user-defined business objects.

2. In the *Layouts* TSI, make sure that this user-defined communication log can be used in pop-ups, so that the back-office can also use the chat feature.

 See the *Layouts* user documentation for more information on creating layouts.

3. In TSIs add the layout to the Communication logs - orders selection step.



See the *TSIs* user documentation for more information on creating layouts.

In **AppSuite - My jobs**, the **Internal communication** block is displayed for a selected job. For the back-office, the communication log for internal communication will be available in ProCenter > **Work Orders** .

## Communication logs for asset documents

If you want to make documents (maintenance manuals, technical drawings or photo's) available to field engineers on the AppSuite - Assets > Documents information block, configure asset communication logs, as follows:

### Procedure

1. In the Layouts TSI, make sure that the following fields are available on the relevant layout of Communication logs: Document reference and / or Document (secure).
2. If you want to allow external links to documentation on a website, make the URL field available on the layout.
3. If you want to share images via communication logs, make the Image field available on the layout.



See the *Layouts* user documentation for more information on creating layouts.

4. In the Assets TSI, on the Asset details > Communication logs level, make sure that these fields are populated with the correct references / links to the documentation.

**References / links in these fields are displayed on the app, in the Documents information block of the selected asset.**



To prevent (secure) documents and images from becoming inaccessible to app users after their user session has expired and their cache has been cleared, you can generate resource keys in Planon ProCenter . See: System settings > [Security - Access to Planon features via encrypted keys](#).

# Action and reason configuration (MM and PMFS)

**MM & PMFS configuration** (in Accelerator: Business processes > PMFS action configuration ) is a TSI that is used to configure *actions* and *reasons* that can be displayed on the layout of any relevant communication log. In addition, you can link specific *PMFS actions* to reasons which can subsequently be displayed in the communication logs of work orders and PPM orders and displayed on the PMFS app. Finally, your action and reason configuration can support the SLAs used by the back-office and enforce feedback from engineers on maintenance checklist items. The following selection steps are available for this purpose on the **Actions** selection level:

- **Actions:** enables the creation of configurable actions. These actions can be displayed in any type of communication log in Planon.
- **PMFS actions:** displays pre-configured, read-only actions, only to be used in *Planon Mobile Field Services* (AppSuite and Planon Live app). Some pre-configured PMFS actions can be linked to reasons, which are also configurable. The following table includes the available PMFS actions:

Code	Description	Additional info
1	EHS accepted	
2	EHS declined	
3	Start work	
4	End work	
5	Start travel	
6	End travel	
7	Wait	
8	Discontinue	
9	Pause	
10	Resume work	
11	Bar code scan	
12	Temporary fix	

Code	Description	Additional info
13	Team order decline	
14	Asset updated	
15	Refuse	
16	Reassign	
17	Unknown asset	
18	Debug snapshot	Planon AppSuite only
19	Time registration	Planon AppSuite only
20	Accept	PMFS Live app only
21	Apply temporary fix and continue	PMFS Live app only
22	Sign off	PMFS Live app only
23	Engineer's sign -off	PMFS Live app only
24	Tradesperson's comment	PMFS Live app only
25	Confirm asset	PMFS Live app only

PMFS actions and any linked reasons are displayed on PMFS mobile devices, where they can be selected by engineers. Back-office personnel will see the PMFS actions and reasons reflected in the *communication logs* ensuing from PMFS orders.



For information on PMFS system settings, see *AppSuite - Configuration Guide > Non-property set dependent PMFS order settings*.

See the following examples, to get an idea of the type of information that is conveyed to the back-office:

The following communication logs are created on the order for the PMFS actions:

- **EHS declined** - created if the field engineer declines the EHS check. The communication log includes: the name of the PMFS action, the engineer's name, the start date-time entered by the engineer, the reason for declining the EHS check, the engineer's comment.
- **Start travel** - created if the field engineer selects the **Start travel** screen. The communication log includes: the name and code of the PMFS action, the engineer's name, the start date-time entered by the engineer.
- **Bar code scan** - created when the field engineer scans an asset bar code. This communication log includes: the date-time the

engineer scanned the bar code, the name of the PMFS action and the engineer's name. The **Comment** field includes the scanned asset code.

- **Refuse** - create if the **Refuse** button is tapped by a signatory on the app. In order to meet any SLAs, the order is still moved to **Technically completed**, even though the customer is not (entirely) satisfied.

*Optional:* if your back-office requires a status transition to reflect this **Refuse** action, you must first create and configure a corresponding 'Refuse' status in Field definer. The status transition must go from **Technically completed** to [Refused]. Next, you can also link a **Refuse** 'action-reason' pair to this status transition.

## Adding actions

The **Action - reason configuration** TSI is the place to define and maintain actions that can be displayed on the layouts of communication logs.

### Procedure

1. Go to the Action - reason configuration TSI.
2. Select Actions > Actions.
3. On the action panel, click Add.
4. Enter a code, name and label for the action in the data section.
5. Click Save.

**The action is added and can be displayed on the layout of a communication log.**

## Adding reasons

The **Action - reason configuration** TSI is the place to add and maintain reasons that can be displayed in communication logs and on a PMFS mobile device.

### Procedure

1. Go to the Action - reason configuration TSI.
2. Go to Actions > Reasons selection step.
3. Click Add on the action panel.
4. Enter a code and name for the reason in the data section.
5. Click Save.

**A reason is added. The reason can be linked to one or more PMFS actions and displayed on the *Work orders communication logs* layout and on the PMFS mobile device. For more information, see [Linking PMFS actions to reasons](#).**




# Linking PMFS actions to reasons


The **Action-reason configuration** TSI is the place to link PMFS actions to reasons in order to display them on communication logs and on the PMFS mobile device.

## Procedure

1. Go to Action-reason configuration > Reasons > Action configuration.
2. Click Add on the action panel.
3. Select an action in the Action field.

 Only the PMFS actions **EHS declined**, **Discontinue**, **Pause**, **Reassign**, **Temporary fix**, **Sign-off refused** and **Wait** can be selected.

4. Select a reason in the Reason field.

 If you are configuring an action-reason pair for the **Pause** action, you can select a value in the **Finalize time registration** field. This field is read-only on all the other actions. See [Configuring labor hour registration](#) for more information.

5. Click Save.

**The PMFS action is now linked to a reason.**

# Linking PMFS actions and reasons to statuses

The action-reason configuration plays a major role in supporting order flows between the back-office and PMFS app users and / or in facilitating SLA management work flows.

In the **Action-reason configuration** TSI you can link combinations between PMFS actions (on the app) and reasons to relevant **Work order** or **PPM order** statuses. Refer to the procedure below for the actual configuration.

## General use cases

- For *work orders* and *PPM orders*, an action-reason combination can move an order to a specific status, for example if the reason relates to an engineer requesting materials or assistance on the app. The status change enables the back-office to act on this request.
- In SLA management, a configured action-reason can move a *work order* to the **On hold** status to 'stop the clock' (labor-hour registration). For more specific SLA-related examples see the examples below.

 Precondition: bidirectional status transitions must be configured for the relevant user-defined order types in **Business object settings** in **Field definer**. Also, PMFS actions must be enabled for these statuses through the **PMFS settings**.

## SLA examples

1. An engineer working on an order via the app selects one of these actions **Wait**, **Pause**, **Discontinue** or **Decline the EHS check** and specifies a preconfigured reason for this action. This triggers an automatic status transition in the back-office that will 'stop the clock'. This means that the wait time is not included in the job completion time, to remain compliant with the SLA.
2. An engineer working on an order via the app selects the **Temporary fix** action. This temporary fix could be 'boarding up a broken window' while waiting for a new pane to be ordered and delivered. The engineer selects a configured reason corresponding with this action. This triggers an automatic status transition in the back-office that is configured for temporary fixes.
3. An engineer working on an order via the app selects one of the PMFS actions mentioned above. However, none of the configured reasons apply, except **Other**. The engineer selects **Other** and enters the real reason in the **Comment** field on the app.
4. A customer is not (entirely) satisfied with the work delivered and refuses to sign off. For the sake of continuity in the SLA flow, the order is still moved to the **Technically completed** status after tapping the **Refuse** button. The job information is sent to the back-office as a communication log, after which appropriate action can be taken.



- For more information on SLA Management in Field Services see *SLA Management*.
- For information on status settings and mobile action settings in Planon AppSuite see [Planon AppSuite Configuration - Field Services](#).
- For more information on the PMFS Live app and actions and reasons, see [Configuring 'Edit forms' for status transitions](#).

## Procedure

1. Go to Action-reason configuration.
2. On the Reasons > Action configuration selection step, select the action - reason combination to which you want to link a status.
3. On the action panel, click Link order statuses.
4. Under Available, select the relevant order status(es) and move them to In use.
5. Click OK.

**The PMFS action - reason combination is now linked to the selected status(es).**

## Linking reasons to checklist results

With planned maintenance activities, there might be (mandatory) checklist items. Field engineers must record a result for checklist items on the app, in order to complete their activity. Checklist results can be linked to reasons, as follows:

### Procedure

1. Go to Action-reason configuration.
2. Go to Actions > Reasons, selection step and select a reason that must be linked to a result.
3. On the action panel, click Link checklist result.
4. In the Link checklist result dialog box, select the result(s) you want to link to this reason.

The results include:

- **Not assessed** - this is the default value for each checklist result.
  - **Assessed with observation** - if this result is selected for a mandatory checklist item, entering a reason is also mandatory. This implies that at least one reason must be configured and linked to the result.
  - **Unable to assess** - this result (and linked reason) is only supported by the PMFS Live app.
  - **Done** - the checklist result is assessed.
5. Click OK.

**The reason is now linked to the selected checklist result(s) and displayed on the app.**



For more information on the fields of checklist items, see [Checklist item fields](#).

# Configuring fault handling

Field Services supports a 'fault handling' workflow. This workflow enables you to record problems detected for a checklist item of a planned maintenance order. This way you can comply with reporting standards and analyze the checks for which faults frequently occur.

The following features are supported:

- **Fault reason** configuration: in **MM & PMFS Configuration**. Once configured, this feature can be used by field engineers to quickly add observed faults.
- **Mandatory checklist item** configuration: in **Maintenance Library**.
- **Result recording**: on reviewing checklist items on the **PMFS app**. Field engineers can select one of these results: **Not assessed**, **Assessed with observation**, **Done**. If the result is **Assessed with observation**, entering a reason is mandatory. Without a reason, the maintenance activity cannot be completed.



- For more information on configuring actions and reasons, and linking them to results, see [MM & PMFS Configuration](#).
- For more information on adding checklist items to the library, see *Maintenance Manager*.

# Configuring the Assets module


If you use **Planon AppSuite** and you would like to use the **Assets** module, read the next sections, to find out how to do the basic configuration.

The following section explain how to configure:

- standard orders to allow creating a service request in the app's Assets module
- an additional asset information block on the asset's details page
- adding an important notice to an asset


## Configuring an additional asset information block

You can configure an additional asset information block for the AppSuite **Assets** module. In this block, you can add asset information that is specifically relevant to your field engineers. In Planon Accelerator, this additional information block can be configured at AppSuite > Assets settings.

 For non-Planon Accelerator users: **Asset settings** is the Accelerator alias of the Web Configuration > Planon AppSuite - Assets selection step. Its system name is **PssModuleNovaAsset\_Step**.

## Adding additional asset information

You can configure an additional asset information block on the app, by adding one or more asset fields to the **Details block** in AppSuite > Assets settings.

-  • If this **Details** block contains no fields, the app will not display the additional asset block.
- Currently, Planon AppSuite supports a limited set of asset fields in the additional asset block.
  - Free fields of type 'URL' can be configured on the **Details** block.

 The first 5 fields will be shown on the **Summary** screen and all will be displayed on the **Details** screen.

### Procedure

1. On Planon Accelerator's navigation panel, go to AppSuite > Assets settings.
2. Select the relevant Assets settings web definition.
3. On the lower part of the elements panel, select the Details page.

4. Edit the translated name of the Details page as required.

**This name is shown on the app, as the additional asset block's title.**

5. Select the Details block.
6. On the data panel, add the asset fields you want to display on the additional asset block.
7. Click Save.

**The additional block is displayed on the app, in the Assets module.**

## Enabling the 'Add service request' button for assets


The following procedure will allow field engineers to add a *service request* to a selected asset in the **Assets** module and on the asset details in the **My jobs** module.

### Procedure

1. Go to Business processes > Standard orders.
2. Verify which standard order(s) you will use for adding service requests in the Assets module or create one or more standard orders.
3. On the action panel, link relevant asset groups to the selected standard order(s).

**On the app, the linked asset groups are used to retrieve the relevant standard order(s) for an asset.**

**The Add request button becomes available on the app for assets that are linked to a standard order via their asset group. For assets that are not linked in this way, the button will be grayed out.**

 You can also link asset groups to standard orders in Supporting data > Asset groups > > .

## Adding an important notice to an asset

In order to better inform engineers about important SLA dependent assets, you can display critical asset information on the app, for example information on an asset's allowed remaining downtime. Typically, this information can help engineers to set priorities when accepting a job. You can configure this in Planon ProCenter Webclient > Assets.

In the Assets TSI, make sure that the **Important notice** field is available on the relevant **Assets** layout(s). For each relevant asset, this field must be filled with the critical information. You can do this manually or have the field updated via an SX (solution extension).

If the **Important notice** field is filled in, the notice is also displayed in Planon AppSuite:

- in the app's **My jobs** module, on job list and on the **Asset** information blocks. In addition, any important notices on assets are shown on the list of maintenance activities.
- in the app's **Assets** module.

# Configuring the Materials module / My mobile store

If you use **Planon AppSuite** and you would like to use the **Materials** module and the mobile stores functionality for field engineers, you require a *PMFS PRO* license. In the next sections, it is explained how you can link a user group to the *PMFS PRO* product definition and how to configure a mobile store.

## Linking user groups to Materials module

If a user group is linked to the *PMFS PRO* product definition, its users can get access to the **Materials** module:

- Go to **Authorization > User group details > Product definitions**.
- Link the relevant user group to the *PMFS PRO* product definition.

## Configuring mobile stores

Within the *PMFS PRO* license, you have the option to configure 'mobile stores'. A mobile store is a distribution point that is located in the field engineer's vehicle. In order to configure the mobile store functionality for a *PMFS PRO* user, you must:

- Go to **Stock > Distribution points**
- From the list of distribution points, select the relevant mobile store.
- In the **Property** field, enter the property on which the mobile store (vehicle) must be registered.
- In the **Mobile store owner** field, enter the 'owner' of the mobile store.
- Click **Save**.



Mobile stores can 'serve' many properties, there are no limitations. Therefore, it is not advisable to link properties to a mobile store via the action panel, as this can cause unwanted restrictions. Although every mobile store is registered on a property (by filling in the mandatory **Property** field), this is purely administrative and just means that the vehicle belongs to that building.

This owner/person can now use the materials in the selected mobile store, as stock items.

## Configuring self-managed stores



In PlanonAppSuite > Field Services, field engineers with a PMFS PRO license can add products to their jobs without relying on administration by a store manager in Planon ProCenter . In these 'self-managed' stores, field engineers can directly issue products (grab stock), which will be registered on the order.



When taking **Planned materials** (added to the job by the back-office) from a self-managed store, the field engineer must confirm the receipt in **Inbound materials**.

To mark a store / distribution point as 'self-managed', you must:

- Go to Stock > **Distribution points**
- From the list of distribution points, select the relevant store.
- Set the **Self-managed store?** field to **Yes**.

## Activating the Request new item button on the App

In PlanonAppSuite > Field Services > My jobs, field engineers with a *PMFS PRO* license can add a request for materials that are not listed in the product catalog (non-catalog items), via the **Request new item** button.

However, the **Request new item** button is only activated if the following condition is met in Planon ProCenter > Field definer :

The **Product** field on the **Requisition lines** business object must not be mandatory.

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