Work assignments

Planon Software Suite
Version: L105

About this Document

Intended Audience

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

Contacting us

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

Document Conventions

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

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

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

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About Work assignments

The **Work Assignments** concept enables multiple persons to collaborate on the same order. These persons can either work on the order simultaneously, intermittently or consecutively.

Prerequisite

If you want to start working with multiple active work assignments (1:n planning) on orders, the following is required:

- Activation of the Work Assignments license *Resource Planner Pro*.

- Activation of the Work Assignments *feature switch* (automatically activated in Planon from release L66).

- If you intend using multiple active work assignments in Planon AppSuite, make sure that the **Field services through the Planon AppSuite** feature switch is also activated.

See Setting the Feature switch and License check for more information.

You can create work assignments for the following order types:

- Work orders

- Move orders

- Planned maintenance orders

Typically, the order will contain information on the *what* and *where* (location and task description), while the work assignments include the *who* and the *when* (resources and time).

Example: an order assigned to multiple resources with their own individual time schedules, could be planned as follows:

Person	Monday	Tuesday	Wednesday	Thursday
A	15 - 17		09 - 17	
B		09 - 12	09 - 17	
C		13 - 17	09 - 17	
D		13 - 17	09 - 17	
E			09 - 17	09 - 11

- Monday (day 1) person A has to prepare the work environment from 15:00 – 17:00.

- Tuesday (day 2), person B's task is scheduled from 9:00 – 12:00.

- Tuesday (day 2), persons C & D are scheduled to work on the order from 13:00 – 17:00.

- Wednesday (day 3), persons A, B, C, D and E are scheduled from 9:00 – 17:00.

- Thursday (day 4), person E is scheduled to complete the order from 9:00 – 11:00.

> ℹ The 'Work assignments' concept does not replace the concept of suborders. 'Work assignments' allow multiple persons (or the same person at different moments) to carry out the *same* activity to complete the order. The concept does not support people performing *different* tasks or activities on the same order.

Work assignments can be added in:

- **Work Orders** > Order details > Work assignments.
- **Resource Planner**

As soon as you fill in the **Internal tradesperson** on an order, a corresponding work assignment is automatically created. If you fill in an internal tradesperson who is a field engineer using the **AppSuite - Field Services** app or the PMFS Live app and set the work assignment status to **Assign**, it will be sent to this person's mobile device, after which the job can be picked up, updated, finished and returned to the back-office.

The following data are mandatory on each work assignment:

- Internal tradesperson
- Order
- Code

> ℹ If configured in your Planon environment, you can also view or edit a person's work assignments in **Personnel** > Details > Work assignments.

Concepts

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

1:1 planning

A planning methodology where the work is scheduled and assigned to a single person. 1:1 (one-to-one) planning means that the order can only ever have one *active* work assignment at a time. It is possible in this scenario for an order to have more than one work assignment during its lifecycle, but never more than a single active one at the same time. This implies a direct dependency between the job and the assigned resource (internal tradesperson).

With one-to-one planning, one work assignment is created for the order. The key data between the two is continuously kept in sync. You can still edit the data on the order, which is not possible in 1-to-n planning.
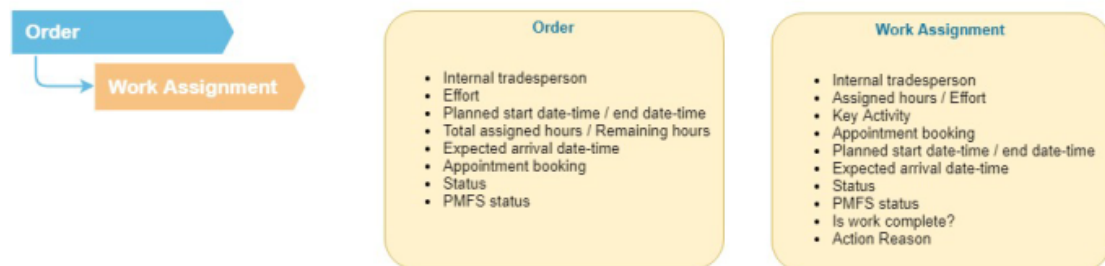
1:n planning

1:n (one-to-many) planning means that an order has more than one *active* work assignment at the same time. In that case, work assignments can overlap, be planned for the same time slot or planned at completely different times.

Switching planning methods

An order can go back and forth between 1:1 planning and 1:n planning. For example, if a work assignment has two work assignments in progress, it is '1:n planning'. If one of the work assignments is completed, the order has one active work assignment. This means it now behaves as '1:1 planning'.

> ⓘ • 1:n planning requires a *Resource Planner* pro license and only works if you have activated the **Work assignments** feature switch (System settings) and **Work assignments** license check setting (Field definer). See: Setting the Feature switch and License check.
> • Upgrading to 1:n planning may also affect the synchronization of statuses. See Synchronization between order and work assignment(s) for more information.

If an order has multiple *active* work assignments, the following fields become 'read only' / empty on the order:

- **Internal tradesperson**
- **Appointment booking**
- **Planned start date-time** (work assignment)
- **Planned end date-time** (work assignment)
- **Expected arrival date-time**

The following image illustrates where data is stored and editable:
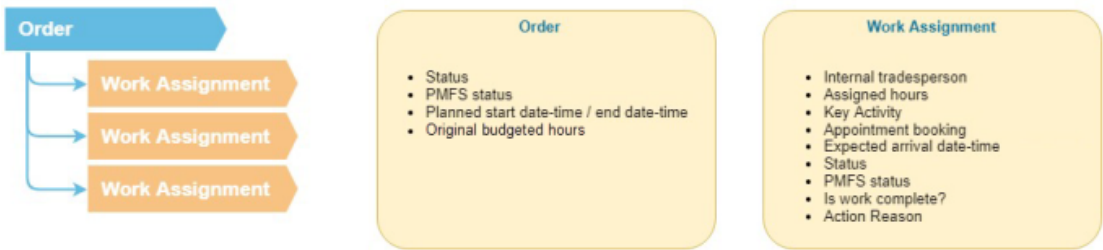
In Resource Planner, the work assignments can be scheduled as follows (for 1:n planning):

- Concurrently
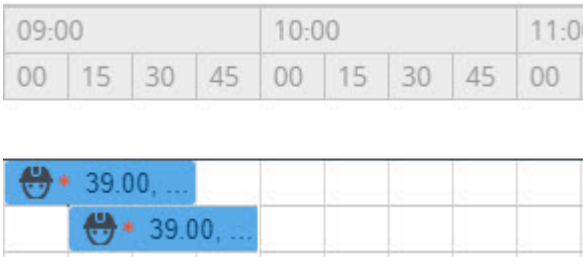
- Consecutively

- Intermittently

> On the Resource Planner planboard, you can use CTRL+drag to 'clone' an existing work assignment. The new work assignment is based on the existing work assignment.

Synchronization between order and work assignment(s)

Work assignment

Active work assignments

Work assignments have system statuses. See Status model - work assignment system statuses for more details. For certain behaviors, the work assignment system statuses are divided up into three categories: *Active*, *In progress* and *Ended*.

A description of these system statuses is given in the following table:

Status	Description
Active work assignments	
Planned	Initial status of the work assignment. A resource is assigned to the work assignment.
Assigned	The work assignment is allocated to a tradesperson and ready to be picked up.
In progress work assignments (these are a subset of *Active*)	
Accepted	The tradesperson has accepted the work assignment and will start work accordingly.
Travel	The tradesperson is 'en route' to start work.
Work	The tradesperson is working on the work assignment.
Wait	The tradesperson cannot continue work and needs to wait (e.g. for a spare part). The clock registering labor hours continues to run.

Status	Description
Paused	The tradesperson is taking a break. The clock registering labor hours is stopped (SLA stop-the-clock).

Ended work assignments

Status	Description
Declined	The tradesperson has declined the Environmental Health & Safety check.
Stopped	The tradesperson has stopped the work while there is still work to be done. The back-office must reassign the remaining work. If the work assignment is a key activity, the order will be put on hold.
Temporary fix	A temporary solution has been provided, but more work is required to resolve the situation.
Done	The work is completed.

'Budgeted hours' based resourcing

Those responsible for resource planning want to make sure that they plan their resources within the hours that are budgeted for on the order.

The budgeted hours on the order can be regarded as the 'bucket' of hours that needs to be spent, either on a single work assignment or on multiple work assignments over multiple resources and multiple days.

Functionality on the order and the associated work assignments enables resource planners to stay within the budgeted hours of the order:

- the planner receives a warning when the 'budget' is exceeded

- initially saving the **Planned start date-time** on the order will trigger the **Assigned hours** calculation on the work assignment, based on the next 'non-available' moment on the planboard (another work order, a day off, training etc.)

- updating the start date-time / end date-time / assigned hours of the work assignment after the initial hour calculation will not trigger a recalculation, because the number of assigned hours may be less than a person actually needs to complete the work. (However, updating assigned hours on the work assignment will update the total assigned and remaining hours on the order). Assigned hours can be manually adjusted, which will still update the total assigned hours on the order.

  Example: a planner may want to plan more hours for an inexperienced tradesperson, without changing the 'budgeted hours'.

See Work assignment fields and Order fields for the fields that play a part in 'budgeted hours' based resourcing.

> ℹ️ Functionality for *multiple* work assignments becomes available if the **Work assignments** licence and the feature switch are both activated. The following fields will become editable: **Original budgeted hours** (on the order), **Assigned hours** (on the work assignment). On standard orders both fields are always editable. The **Effort** field on orders and work assignments will no longer be functional, as this field is only useful for 1:1 planning. If you migrate from 1:1 planning to multiple work assignments, you have two options in populating the **Original budgeted hours** field:
> • If there are relatively few orders to migrate: manually copy the value of the **Effort** field into the **Original budgeted hours** field, per order.
> • If there are relatively many orders to migrate: use an Enterprise Talk import/export definition to export the value from the **Effort** field and import it into the **Original budgeted hours** field for the whole bulk of orders.

> ℹ️ See the **Enterprise Talk** user documentation for information on creating export and import definitions.

Key work assignment

In 1:n planning (more than one active work assignment linked to an order), you can define a work assignment as **Key work assignment**. Only a key work assignment can update the order's status.

If there are multiple work assignments linked to the order, you must decide which assigned tradesperson is the main responsible person for the order. The key work assignment must be allocated to this person, who can then can update the order information. See Main responsible engineer for more information. The 'non-key' work assignments are only allocated to resources for time registration purposes. The order details will be updated with information from these work assignments.

The field **Key work assignment?** can only be edited if the work assignment is in a **Planned** or **Assigned** status. This also applies in **Resource planner**, where the **Key work assignment** action on the context menu becomes read-only if the work assignment is not in the **Planned** or **Assigned** status.

> ℹ️ • If there is no key work assignment, the status of the related order will not be updated.
> • It is possible to have multiple key work assignments on an order. In that case, it is good to keep in mind that the last key work assignment to be updated, will also update the order.

Main responsible engineer

Most field engineers to whom jobs are assigned will be unaware whether a job is based on 1:1 planning or 1:n planning. To them it is just a job that needs to be completed.

> Persons to whom a Key work assignment is allocated need to be informed/ notified by the back-office or planner that they are the 'main responsible' person for the status flow and completion of the order.

An order can have multiple key work assignments. For example, if you have a team of people working on an order over multiple days, it is logical to have a key work assignment for each day of work.

A main responsible engineer will be in charge of:

- Editing the planned materials, if required.

- Confirming the receipt of materials.

- Returning materials to the store that were not used.

- Filling in questionnaires that are required at the start or at the end of the work.

- Acquiring the customer's sign-off.

- Completing the job that is linked to the key work assignment and - as a result - technically completing the order.

Status model - work assignment system statuses

This status model can help you understand which basic status transitions are possible on a work assignment. There are more status transitions available, but these are left out here to keep the model simple.
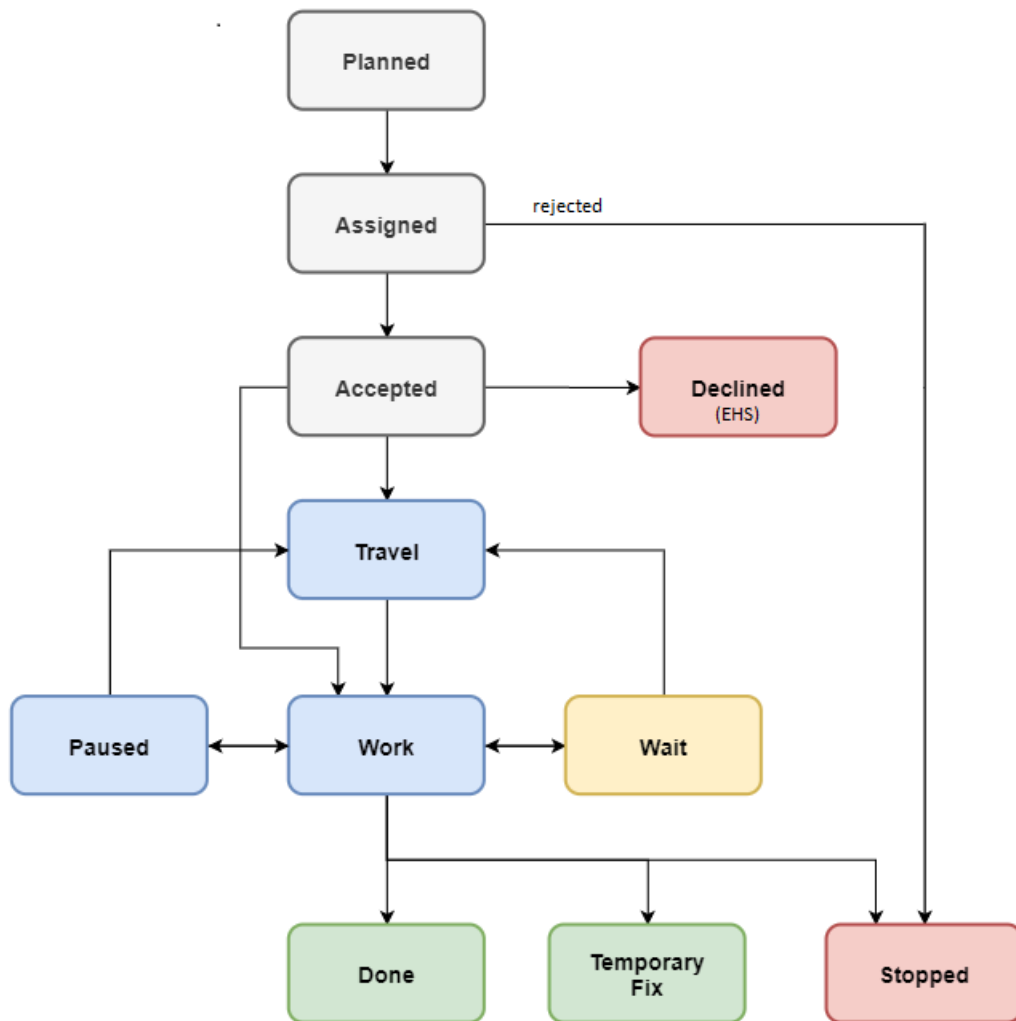
Legend

Red & green: end statuses. The work assignment is at the back-office, no longer on the app.

Grey: statuses indicating the preparation phase. The engineer has not started the work.

Blue: statuses indicating that the work is being executed / in progress.

Yellow: statuses indicating exceptional events, like **Stop the clock** (SLA).

ℹ️

- **Orders** supports *user-defined statuses*. To correctly synchronize orders with work assignments, user-defined order statuses must be mapped to the above *system statuses* of the work assignment.
See: Status mapping and Synchronization between order and work assignment(s).
- By configuring an action <-> reason combination, you can enforce field engineers to enter a reason on making a specific status transition. See Supporting data > Action - reason configuration for more information.

Tradesperson - Field engineer - Resource

In Planon ProCenter (Work orders), the person to whom a work assignment is assigned is the **Internal tradesperson**. In other Planon solutions and products this same person is sometimes referred to as *Field engineer* (in Planon AppSuite - Field Services) or as *Resource* (in the Resource Planner). All these labels point to the same person.

If you have multiple work assignments linked to an order, you can set one (or more) work assignment as the **Key work assignment**. As a result, the person assigned to the key work assignment is the main responsible person for the order and only this person can update the order information. See Main responsible engineer for more information.

Implications of upgrading to Planon Live with work assignments

An upgrade to Planon Live L47 will have implications due to the introduction of work assignments.

The basic work assignments functionality (1:1 planning) becomes available on all order-related functionality once you upgrade to Planon Live L47.

This has several implications, <u>even for users who have not purchased the *Resource Planner Pro* license</u> and who have not set the corresponding *Work Assignments* feature switch that allows for 1:n planning.

The following changes are made generically in the Planon application upon the upgrade:

- For each order with an internal tradesperson filled in, a work assignment is created.

- Status mapping settings for AppSuite are moved from AppSuite **Order settings** to Field Definer > Orders > Business object settings > Status mapping tab.

> **ℹ**
> - The status mapping for the **Assigned** and **Reassigned** statuses will be merged.
> - Statuses cannot mean two different things and consequently cannot appear in more than one status mapping. On the upgrade, the AppSuite **Order settings** settings are merged with the Field definer > Business object settings on **Orders**. The AppSuite **Order settings** settings are leading and will replace any existing status mapping. If a status is mapped multiple times in the AppSuite configuration, the status mapping with the highest priority is merged and the others are ignored. Also see: Synchronization between order and work assignment(s).

- The **PMFS status** field on the **Orders** data panel no longer displays the **Fetched** status, because it became obsolete.

- A data loss warning message will be displayed upon changing the **Internal tradesperson** or **Status** on the order, while the corresponding work assignment is on a mobile device.

Configuring work assignments TSIs and layouts

The following configurations steps are recommended for both 1:1 planning and 1:n planning, so it does not matter whether or not you have activated the feature switches and license check for multiple work assignments.

Procedure

1. Add a selection step in Orders.

   a. In TSIs select Orders.
   b. Set the Orders TSI under construction.
   c. Go to the TSIs level and expand the TSI.
   d. Select Order details and add the selection step Work assignments.
   e. Return to All TSIs and set the TSI to completed.

2. Optionally, add a selection step in Personnel.

   a. In TSIs select Personnel.
   b. Set the Personnel TSI under construction.
   c. Go to the TSIs level and expand the TSI.
   d. Select Details and add the selection step Work assignments.
   e. Return to All TSIs and set the TSI to completed.

3. Go to Layouts.

4. Select the Work assignments layout and put it under construction by clicking the padlock icon.

   All fields are available on the layout.

5. Configure the layout according to your requirements (reposition fields, add bars etc.).

> See **Layouts** for more information on configuring layouts.

6. Set the layout to Completed.

7. Log out and log in again.

Setting the Feature switch and License check

Before you can create and use *multiple work assignments* for 1:n planning, you have to make some setting changes.

If you intend to use *multiple work assignments* (1:n planning) on orders, you require a Resource Planner Pro solution license. After installing this license and linking it to the relevant user groups, make sure the following feature switches and license check are activated:

1. Go to System Settings **>** Improved features.
2. In order to combine *multiple work assignments* with the use of Planon AppSuite, activate the Field services through the Planon AppSuite feature switch.
3. Activate the Work assignments feature switch (automatically activated in Planon since release L66).

For an overview of the implication of these settings, see Implications of setting the feature switches.

4. Next, go to Field definer **>** Orders.
5. Select Orders and click Under construction on the action panel.
6. In the Order settings dialog select the Work assignments tab.
7. In the Activate 'Multiple Work Assignments'? field, select Yes and click Save.

> ⚠️ • Activating this setting cannot be undone!
> • You can only activate this setting if you have the appropriate Work assignments license (*Resource Planner Pro*).

8. In the dialog that is displayed select Proceed if you are absolutely sure that you are ready to activate the license check for multiple work assignments.
9. Click Close.
10. In the **Status behavior when setting orders to Assigned** field, you can activate an additional setting to have order statuses automatically updated to **Assigned** when one of the linked work assignments is assigned.

See Field definer > Settings for the Orders business object > Work assignments (license check setting) for more information.

11. Set the Orders business object status to Completed.

This license check setting for the use of multiple work assignments also includes Resource Planner and Planon AppSuite. See Adding multiple work assignments in Resource Planner for more details on functionality.

You have completed the main part of the configuration and can continue with configuring statuses and 'action-reason' combinations.

Implications of setting the feature switches

During the upgrade, a work assignment will be added automatically for each existing order with an assigned internal tradesperson. Still, before you can use the *multiple work assignments* functionality, you must activate two feature switches to enable the corresponding Improved Features.

What happens when enabling the feature switches?

- Work assignments

  - Order statuses **Administratively completed** and **Canceled** can no longer be used in status mapping (**Business object settings**).

  - For planned work, the **Start date-time** and **End date-time** of the order were leading. After the switch is set, the **Planned start date-time** and **Planned end date-time** on the work assignment are leading.

ℹ️ For a detailed overview of changes, see Overview of changes.

Overview of changes

The 'behavior' of the application depends on whether you have enabled the feature switch in **System Settings** and if you have a work assignments license (Resource Planner Pro).

Feature switch enabled without activating multiple work assignments setting

The following table displays the impact on various elements / events in Planon if you enable the feature switch in **System Settings** <u>without</u> activating the **Activate 'Multiple Work Assignments'?** setting on **Orders** in **Field Definer**.

Orders

Event description	Before	After
Data loss warning upon deleting an	No warning, unless the work assignment is on the device.	Warning if one or more work assignments exist

Event description	Before	After
order with multiple work assignments		in an **In progress** status.
Check if the order's start date-time is a non-working day	Checks and displays a warning.	No check.
Check if the order's start date-time is outside working hours	Checks and displays a warning.	No check.
Check if the order's end date-time is a non-working day	Checks and displays a warning.	No check.
Check if the order's end date-time is outside working hours	Checks and displays a warning.	No check.
Check if the order's start date-time is in the past	Checks and displays a warning.	No check.
Disabling fields on the order	**Planned start date-time (work assignment)**, **Planned end date-time (work assignment)** are disabled	Fields are not disabled.
Populating the field **Planned start date-time (work assignment)** on the order upon field change	Does not populate	Populates the field **Planned start date-time (work assignment)** on the order if a work assignment is going to be created. Clears the field when the internal tradesperson is removed.
Set **Start date-time / End date-time** of the order to that of the related WBS item, only if the field is empty. Triggered when WBS item	Set the **Planned start date-time (work assignment)** on the order.	Does not fill the **Planned start date-time (work assignment)** on the order.

Event description	Before	After
is changed on the order.		

Work assignments

Event description	Before	After
Validation of number of work assignments per order	Only one work assignment is allowed.	Only one work assignment is allowed if license is not valid.
Change of the **Order** reference field on the work assignment. Fields will be taken over from the new order reference.	Work assignment will take over the **Start / End date-time** of the order.	The first work assignment takes over the **Start / End date-time** of the order and the others will take over the **Planned start /end date-time (work assignment)** of the order.
Check if work assignment's Start date-time is a non-working day.	No check	Checks and displays a warning.
Check if work assignment's Start date-time < System date-time.	No check	Checks and displays a warning.
Check if work assignment's Start date-time is outside working hours.	No check	Checks and displays a warning.
Check if work assignment's End date-time is a non-working day.	No check	Checks and displays a warning.
Check if work assignment's End date-time < System date-time.	No check	Checks and displays a warning.
Check if work assignment's End	No check	Checks and displays a warning.

Event description	Before	After
date-time is outside working hours.		

Status mapping (Orders)

Event description	Before	After
Data limit on status mapping. Previously PMFS settings; now **Business object settings** for Orders in **Field definer** (**Planned** / **Assigned** / **In progress** / **On hold**).	All statuses can be used in the status mapping 'buckets' in Field definer > Orders > Business object settings.	**Technically completed/Admin. completed/Canceled** are excluded from status mapping.
Data limit on status mapping (Previously PMFS settings; **Business object settings** for Orders in **Field definer** (**Completed**).	All statuses can be used in the status mapping 'buckets' in Field definer > Orders > Business object settings.	**Admin. completed/Canceled** are excluded from status mapping.
Validation on enforcing statuses in the status mapping 'bucket'	User statuses **Canceled** and **Admin. completed** can be configured in the **Business object settings** status mapping.	User statuses **Canceled** and **Admin. completed** cannot be configured in the **Business object settings** status mapping.
Validation on enforcing statuses in the status mapping 'bucket'	User status **Technically completed** can be configured in the **Business object settings** status mapping.	User status **Technically completed** cannot be configured in the **Business object settings** status mapping.

Resource Planner

Event description	Before	After
Check which business object should be considered upon the **Assign work assignments**	The bulk action considers orders.	The bulk action considers work assignments.

Event description	Before	After
within a period bulk action.		
Check which business object should be considered upon the **Plan work assignments within a period** bulk action.	The bulk action considers orders.	The bulk action considers work assignments.
Check whether the **Assign work assignments within a period** bulk action should be shown in the Resource Planner.	The **Assign work assignments within a period** action should only be shown if **Assigned** statuses have been configured.	The **Assign work assignments within a period** action must always be shown.
Check which business object definition the **Assign work assignments within a period** bulk action should consider; used for button caption and dialog title.	The **Assign work assignments within a period** action considers orders.	The **Assign work assignments within a period** action considers work assignments.
Check whether the bulk action target statuses must be sorted on code.	There is no sorting on code.	Sorting is done on code.
Set flag to 'inform' the browser whether the **Work Assignments** feature switch is activated (used by other logic).	Sets the flag to *false*.	Sets the flag to *true*.
Implication of dragging an ended work assignment on the planboard	Dragging an ended work assignment 'clones' the work assignment into a new one for that order. The original ended work assignment is hidden in Resource planner.	Dragging an ended work assignment 'clones' the work assignment into a new one for that order. The original ended work assignment remains visible in Resource planner.

Event description	Before	After
Implication of dragging an unplanned order on the planboard (if ended work assignment(s) exist(s))	Dragging an unplanned order creates a new work assignment for that order. Any ended work assignments which were visible, will be hidden in Resource planner.	Dragging an unplanned order creates a new work assignment for that order. Any ended work assignments which are visible, remain visible in Resource planner.
Check which information should be shown in a Resource Planner event tooltip.	Shows information on the order.	Shows information on the work assignment *and* the order.
Check whether a confirmation pop-up must be shown after removing a work assignment from the planboard.	Confirmation pop-up not displayed.	Displays a confirmation pop-up.
Use the status-info to check whether the work assignment's or the order's status icon should be used.	The order's status icon is used.	The work assignment's status icon is used.
Use the status-info to determine the event's target status for the **Planned** context menu option.	Determines the target status based on status in the **Planned** status mapping.	Does not determine a target status, as the context menu option is not available.
Use the status-info to determine the event's target status for the **Assigned** context menu option.	Determines the target status based on status in the **Assigned** status mapping.	Determines the target status based on work assignment system status.
Check whether the **Unplanned** orders panel must be refreshed after deleting a work assignment.	Always refreshes the **Unplanned** orders panel, as the associated order is now unplanned.	Conditionally refreshes the **Unplanned** orders panel, based on various other factors.
Check whether the 'key' activity icon must be shown on the planboard event.	Never display the key activity icon, even if the work assignment is a key activity.	Shows the key activity icon if the work assignment is a key activity.

Event description	Before	After
Check whether the 'key' activity icon should be shown in the event tooltip.	Never show the key activity icon, even if the work assignment is a key activity.	Shows the key activity icon if the work assignment is a key activity.
Check whether the **Edit work assignment** and **Key activity?** context menu options should be shown.	Does not show these context menu options.	Shows these context menu options.
Check whether the **Assign** context menu option should change the status of the order or the work assignment.	Changes the status of the underlying order.	Changes the status of the work assignment.
Warning message when a resource's unavailability has an overlap with an order.	Order description is used in the warning.	Work assignment description is used in the warning.
Recalculation of the **Start date-time** and **End date-time** on the order when WBS dates are changed.	Sets the **Planned start / end date-time (work assignment)** on the order.	Does not fill the **Planned start / end date-time (work assignment)** on the order.

Implications of activating multiple work assignments

Feature switch enabled with multiple work assignments setting activated

The following table displays the impact on various elements / events in Planon if you enable the feature switch in **System Settings** and set the **Activate 'Multiple Work Assignments'?** setting on **Orders** to **Yes**, in **Field definer**.

Description	Before	After
Effort		

Description	Before	After
Take over **Effort** from the order to the work assignment	Fields are not disabled.	Disables the **Effort** field.
When changing the order reference field on the work assignment, fields will be taken over from the new order reference.	The work assignment's **Effort** field is taken over.	The work assignment's **Effort** field is not taken over.
Resizes Work Assignment.	Calculates a new **Effort** value if needed when start date-time of work assignment is changed.	Does not calculate **Effort** value when start date-time of work assignment is changed.
Calculate **End date-time** or **Effort** on Work Assignment.	Calculation allowed.	No calculation allowed.
Calculate End date-time or Effort on Order.	Calculation allowed.	No calculation allowed.
Effort/Budgeted hours		
Updating **Effort** / **Original budgeted** hours on the order.	Updates both **Effort** and **Original budgeted hours**.	Updates **Original budgeted hours** only.
Budgeted hours		
Checks whether budgeted hours based resourcing should be used.	Never use budgeted hours based resourcing, even if the order has remaining budgeted hours.	Uses budgeted hours based resourcing if the order has remaining budgeted hours.
Disables Fields.	Disables **Original budgeted hours** and **Assigned hours** fields.	Fields are not disabled.
Returns whether a given order has 'Remaining budgeted hours'.	Always returns "false". Does not perform the actual check.	Checks whether the order has remaining hours.

Description	Before	After
Calculates **Assigned hours** and **Planned end date-time** based on calculation type and updates on work assignment.	Calculation not allowed.	Calculation allowed.
Validates that **Assigned hours** field cannot be changed.	Validation takes place.	No validation.

> ℹ Functionality for *multiple* work assignments becomes available if the **Work assignments** licence and the feature switch are both activated. The following fields will become editable: **Original budgeted hours** (on the order), **Assigned hours** (on the work assignment). On standard orders both fields are always editable. The **Effort** field on orders and work assignments will no longer be functional, as this field is only useful for 1:1 planning. If you migrate from 1:1 planning to multiple work assignments, you have two options in populating the **Original budgeted hours** field:
> • If there are relatively few orders to migrate: manually copy the value of the **Effort** field into the **Original budgeted hours** field, per order.
> • If there are relatively many orders to migrate: use an Enterprise Talk import/export definition to export the value from the **Effort** field and import it into the **Original budgeted hours** field for the whole bulk of orders.

> ℹ See the **Enterprise Talk** user documentation for information on creating export and import definitions.

Status mapping

Work Assignments: additional configuration is required to 'map' user-defined statuses of orders onto the system statuses of work assignments. See Status model - work assignment system statuses.

> ℹ️ A work assignment's system status can only be defined once in the mapping, because it cannot mean two different things. You can link one or more user-defined order statuses to the work assignment's status, provided that they belong to the order types: work order, move order or planned maintenance order (PPM order). One reason for having more than one user-defined order status linked may be that you want to configure different workflows for the same order type.

In Field definer > **Business object settings** > **Status mapping** , you can define the order statuses that map to the work assignment's system statuses. Order statuses can be defined for: **Planned**, **Assigned**, **In progress**, **On hold**, **Temporary fix** and **Completed**. Valid status transitions must exist, for the key work assignment to be able to update the order's status in **Work Orders** . If no such transitions exist, the order status will not be updated.

P r o c e d u r e

1. Go to Field definer > Orders.

2. Set the Orders business object Under construction and then click Business objects settings.

   The Order settings dialog box is displayed.

3. On the Status mapping > Links action panel, click the relevant status mapping option(s):

   ◦ Status mapping: Planned statuses

   ◦ Status mapping: Assigned statuses

   ◦ Status mapping: Temporary fix statuses

   ◦ Status mapping: On hold statuses

   ◦ Status mapping: In progress statuses

   ◦ Status mapping: Completed statuses

   A dialog box is displayed.

4. Select the order status(es) that you want to link and move them to In use.

5. Click OK and close the dialog box.

6. Set the Orders business object to Completed.

You have created mapping between the statuses of work assignments and orders.

> ℹ When applying a status transition, the Planon application will attempt to apply a transition based on the sorting of status transitions.

Linking reasons to actions

Sometimes it is important that the planner (back-office) is informed about a specific status transition, performed by the engineer / tradesperson. For this purpose, you can link *reasons* to specific actions.

1. Go to AppSuite > PMFS action configuration and select an action for which you want to configure a reason.
2. Go to the Reasons level and select or add a reason that you want to link to the action.
3. Click Link order statuses to link a status to the reason.

When the status of a key work assignment changes and the corresponding order *action* has configured *reasons*, the user must select the reason, which is then returned to the order.

Example

For the action **Pause**, several reasons are defined:

- Tools required
- Lunch break
- Priority changed

In this example, the reason **Priority changed** can imply that the back-office may need to re-plan the work, possibly to a different day or engineer. In that case, it is possible to configure a status against the reason, so that when this reason is selected by the engineer, the order status is also updated (as long as the status transition is valid). The engineer can add an additional comment to explain why the priority has changed.

Synchronization between order and work assignment(s)

When an internal tradesperson is added to the order, a work assignment is automatically created. Work assignments can also be manually added to an order by the back-office or via Resource Planner.

Synchronization process:

1:1 planning

The order and the work assignment are continuously synced (because there is only one work assignment).

1:n planning

Synchronization is different, because there are multiple work assignments on an order (it is possible for the order to have a combination of key and non-key work assignments). Only the key work assignment's status will be synchronized with the order.

Good to know: in Field definer you can make settings to have an order status automatically updated to **Assigned**, based on the **Assigned** status of linked key work assignments. See Work assignments (license check setting) for more information.

> For customers migrating from **1:1 planning** to **1:n planning** (*Resource Planner Pro license*) it is recommended to create status transitions between relevant user-defined order statuses. For example: if you have an order status flow from **Accepted** > **Assigned** > **In progress**, the **Assigned** 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**.

> If you combine the use of Planon AppSuite and *multiple work assignments*, you must be aware that information may be incomplete on a customer sign-off. Although this will rarely occur, as the person collecting the signature is usually aware of the situation in the field, it is recommended to let the back-office handle the *customer sign-off*. The main responsible engineer cannot always be 100% sure that colleagues working on the same order are completely up-to-date with their registrations. Some of them may even be offline. Synchronization on the app alone is no guarantee that all work assignments are actually completed.

1:n planning

Status transitions during synchronization

When applying a status transition to the work assignment (which will update the order status), the Planon application will attempt to apply a transition based on the (alphabetical) order of the code of the statuses available in **Business object settings** (same is true for **Actions <-> Reasons**).

Example

An order in status O1 can go to the following Assigned statuses:

Status from	Status to
<empty>	O1
O1	O2
O1	O3

When applying a status transition in Resource Planner to work assignments, the order status (when synchronized) will go from *O1* to *O2* rather than *O3*. That is because:

- The transition is possible.
- Code *O2* comes before *O3*.

Work Assignments in Planon ProCenter

Prerequisite

If you want to use *multiple active work assignments*, make sure that the configuration steps described earlier have been implemented (license, feature switches, status mapping and action<->reason settings).

To work with work assignments, go through the following steps:

Procedure

1. Create an order in **Work Orders** on the Orders level.
2. Assign the order to an internal tradesperson.

   A work assignment is automatically created for the order on the Order details level.

3. You can manually add more work assignments to an order in Resource Planner or in **Work Orders** on the Order details level.

You can also view / edit a person's work assignments in Personnel .

> If you want to use work assignments for mobile field services (PMFS), you can use the PMFS Live app or the Planon AppSuite - Field Services app, which support multiple work assignments.

4. Move work assignments to the **Assigned** status to send the work assignment to field engineers using the app.

   The field engineer receives the job on his/her device. For a field engineer, a 'job' contains the work assignment and any order information that is needed to carry out the work.

> Good to know: if a field engineer (internal tradesperson) has opened a work assignment on the PMFS Live app , and the back-office decides to update the **Internal tradesperson** field, the field engineer gets a warning message on the app. If the engineer acknowledges the warning message, the work assignment is set to **Stopped** and removed from the device.

Orders and Work assignments

With the Work Assignments license, you can add multiple work assignments to an existing order in **Work Orders** .

> **ℹ** For more information on adding work assignments to an order, refer to the *Work Orders* documentation.

An order can be completed by setting the field **All work completed?** to **Yes**, even if there still are other active work assignments. Any *In progress* work assignments will be left open so they can be completed. Any *Planned* or *Assigned* work assignments will be ended. If the last key work assignment is set to **No**, the order will be placed **On hold**.

> **ℹ** If you work with the Planon AppSuite and there are multiple, active work assignments, it is not possible to cancel an order if at least one work assignment is still *In progress* (**Accepted**, **Travel**, **Work**, **Wait**). This is because work assignments that are in progress can still have a running time registration or other essential data entries by the field engineer. In order to cancel the order, the field engineer in question must first stop or end the work assignment.

Replanning orders (1:1 planning)

Replanning of an order, i.e. changing the start and end date, status or internal tradesperson, can only be done in case of 1:1 planning. A new work assignment is created for each replanning action, in order to preserve the 'history' of the work assignment. However, only one work assignment can be *active* (which means having a status other than **Done**, **Declined**, **Stopped** or **Temporary fix**).

A new work assignment is created in the following situations:

- If you replan an order while the work assignment has the **On hold** or **Temporary fix** status; this will always lead to a new work assignment, as the previous work assignment is ended (**Declined**, **Stopped** or **Temporary fix**).

- If you re-open an order which has a work assignment in status **Done**.

The new planning information (start date-time, end date-time and internal tradesperson) is copied to the order, so the order will always reflect the latest, active work assignment. The fields **Internal tradesperson**, **Start date-time**, **End date-time** will be synchronized with this active work assignment.

> **ℹ** If an order has multiple active work assignments (in 1:n planning) the above order fields become read-only and display calculated values.

Creating multiple work assignments

There are various ways in which you can add multiple work assignments in Planon.

Work assignment

Adding multiple work assignments in Resource Planner

With the **Work assignments** license, you can add one or multiple work assignments to a single order in **Resource Planner**:

1. In Resource Planner, orders are shown in the Unplanned orders panel at the bottom. By moving them to the planboard, a work assignment is created (status is Planned).

2. To create another work assignment for the same order, press CTRL and simultaneously drag-and-drop the work assignment to the required place on the planboard.

3. Drop it onto:
   - the same resource and a different time slot
   - a different resource and to the same / another time slot

   You have 'cloned' the work assignment.

4. Optional: right-click the work assignment to open a context menu. The options Edit work assignment and Key work assignment? enable you respectively to edit the work assignment fields and mark the assignment as a key work assignment.

To edit the corresponding order, double-click the work assignment on the planboard.

For more information, see Work assignment fields.

Adding work assignments in Work Orders

You can add multiple work assignments to an order in **Work Orders** . For information on the work assignment concept, see Work assignment.

P r o c e d u r e

1. In **Work Orders** , select an order for which you want to create work assignments and go to Work order details.

ℹ️ If the order includes suborders to which you want to link work assignments, select the relevant suborder and drill down to Order details > Work assignments.

2. On the Work assignments action panel, click Add.

ℹ️ To create multiple work assignments, you can either copy the work assignment and modify its details, or you can add a new work assignment.

3. On the data panel, fill in the work assignment data.

   For more information, see Work assignment fields.

4. With each new work assignment, decide whether to allocate it to:

- ◦ the same **Internal tradesperson** and a different **Start-date-time**

- ◦ a different **Internal tradesperson** and the same / another **Start-date-time**

5. Click Save.

   The work assignment is added in the Planned status. From here on, it will go through the configured workflow. The status of the key work assignment will automatically update the status of the order.

ℹ️ For information on configuring status mapping between order and work assignment see Status mapping

Work assignments in Planon AppSuite

Work assignments make it possible for one person or more persons to work on the same order (work order, planned maintenance order or move order). In the Planon AppSuite, work assignments are displayed as jobs in the **My jobs** module.

The type of planning of a work assignment has some implications for the way they are handled in relation to the order:

- In 1:1 planning a job basically coincides with the active work assignment and the associated order. This requires no special attention from application managers or the back-office.

- In 1:n planning a job is part of a 'family' of identical work assignments. Both application managers and the back-office must be aware that additional configuration or back-office processes may be required.

AppSuite job list

In the Planon AppSuite, work assignments are displayed in the job list of the **My jobs** module. The following items determine what is shown in the job list:

- **Sorting of job list** - depending on the AppSuite > Order settings made in the **Order date-time** field, the job list is sorted in 'calendar view' either on the basis of the **Planned start-date-time** of the work assignments or on the **Requested completion date-time** of the order.

- **Team job** - if a work assignment is defined as a team job, this means that all team members will see it displayed in their job list. All are allowed to pick it up. The job is assigned to the first team member who accepts it. If all team members decline the job, the work assignment is set to **Declined** and returned to the back-office. If order statuses are correctly mapped, the order will go to **On-hold**.

- **PMFS status** - the **PMFS status** of a work assignment determines whether a job is displayed in the job list on the engineer's mobile device. As soon as a work assignment is assigned to an engineer it appears as a new job to the mobile device. At that point, the **PMFS status** is still empty. Once the engineer accepts a new job from the list, the PMFS status changes to **Accepted**. After the engineer has ended the job, the PMFS status changes to **Finished**. The work assignment is sent to the back-office and the corresponding order is updated with the engineer's changes. The job will be removed from the device.

Impact of AppSuite actions on order and work assignments

Some actions selected by engineers on their mobile devices will have implications for the corresponding work assignment(s) and orders. Among other things, these actions determine the way SLAs are handled or how the materials to be returned are calculated.

Wait / Resume

All work assignments can be set to the **Wait** status, but only **Key work assignments** can actually trigger the **Stop the clock mechanism** on SLAs. If the main responsible engineer selects **Travel**, **Work** or **Pause**, the work assignment is resumed.

End work / **Finish**

If the 'Multiple work assignments' feature has been enabled, and the assigned job is a *key work assignment*, the engineer is responsible for the completion of the related order. In that case, he / she has the option to either select **End my work** or **Finish order**. If a job is a non-key work assignment, the engineer can only select **End work**.

- The **End my work** action should be used when there is unfinished work on the order. If the engineer selects this action on the app, the 'parent' order is set to **On hold** (or a similar configured status) if there still are other planned / pending work assignments. The back-office can subsequently reassess and reassign the order, resulting in a new work assignment for the continuation of the work.

- The **Finish order** action should be used when all work on the order is finished. If the engineer selects this action, the 'parent' order is set to **Technically completed** (or a similar configured status). The back-office can subsequently administratively complete the order.

Selecting **Finish order** implies that all work related to the order is done. In the back-office the status of the **All work completed?** field is set to **Yes**. The action will start the *customer sign-off process* or calculate the *materials to be returned*, but only if the job is a Key work assignment. If there are maintenance activities on the job that are not completed, these will be completed automatically. If there are still checklist items pending or if materials are requested by the engineer, the job cannot be finished.

Material handling

Material handling in Planon AppSuite is done via jobs that are based on a Key work assignment. A field engineer allocated to a key work assignment can do the following:

- Update / edit planned materials

- Confirm received materials

- Return materials upon finishing the order

Planned materials of key jobs can only be edited by the *main responsible* engineer. However, the other engineers can add the materials they have *used*. Requesting or

reserving materials is not dependent on the job being a key work assignment. If a mobile store is used, only the owner of the mobile store can edit the planned materials coming from that store.

Questionnaires

If an order consists of multiple work assignments, this may also have implications for any questionnaires linked to the order.

- Questionnaires of the **Before starting work** or **After ending work** types can only be used with key work assignments. On non-key work assignments, these questionnaires are not displayed.

- Questionnaires of the **In job main menu** type can be used and edited on all work assignments.

- If multiple engineers answer the questions in a questionnaire, the rule of thumb is: the last answer given is actually stored.

Signing off jobs

Engineer's sign-off

If an engineer signs off his/her job, all materials that exist for the related order are displayed. This list may not have been synchronized and therefore be inaccurate. Only if all work assignments have been synchronized with the related order, can the system calculate the right amount of materials used.

> ℹ️ Materials are not registered per work assignment, but per order. The materials displayed on an engineer's device are all the materials related to this order. They are considered 'to be used' unless they are returned.

Customer sign-off

The customer sign-off must be done on the job that is based on a key work assignment. The engineer to whom this key work assignment is assigned, is the Main responsible engineer for finishing the order. Newly added, used materials and requested / reserved materials will be listed on the customer sign-off. Materials added by others are only listed if they are synchronized. The main responsible engineer must make sure that all work assignments on this order are completed and the tap the **Synchronize** action before tapping **Finish job**.

> ℹ️ On rare occasions, there still may be non-synchronized work assignments, due to engineers working offline. In that case the information on the customer sign-off is not completely accurate. For more information, see Synchronization between order and work assignment(s).

> ⚠️ 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.

Field descriptions

The following section(s) describe(s) the fields, their purpose and meaning.

Work assignment fields

Field	Description
Action date-time	Date-time stamp, displaying the date-time of the last action by the assigned user (tradesperson / engineer).
	Example: an engineer completes a job on the device, but is working offline. The **Action date-time** will be populated with the moment the job was completed on the device. The **Ended on** field however, is populated with the moment the back-office sets a status to finalize the job.
Actual start date-time	This field is automatically populated with a date-time as soon as the work assignment's status is set to **Work**. The date-time represents the time zone of the property.
Actual start date-time (user)	This field is automatically populated with a date-time as soon as the work assignment's status is set to **Work**. The date-time represents the time zone of the user.
Actual end date-time	This field is automatically populated with a date-time as soon as the work assignment's status is set to **Declined**, **Stopped**, **Temporary fix** or **Done**. The date-time represents the time zone of the property.
Actual end date-time (user)	This field is automatically populated with a date-time as soon as the work assignment's status is set to **Declined**, **Stopped**, **Temporary fix** or **Done**. The date-time represents the time zone of the user.
All work completed? *[only editable on a key work assignment]*	If the Main responsible engineer sets this field to **Yes** on a Key work assignment and the work assignment's status is **Done**, the order is completed. If this field is set to **No** and the work assignment status is then set to **Done** (and there are no other active key work assignments), the order is put **On hold**.

Field	Description
	If this field is empty (=default value) and the key work assignment is set to **Done**, the order is set to **Completed**.
Appointment booking?	Click **Yes** if the work assignment must appear as an appointment booking on the mobile device of the field engineer (internal tradesperson). Once made into an appointment booking, it has a fixed start date. Field engineers can recognize appointment bookings by their icon in the PMFS app. The default setting in this field is **No**.
	ℹ The following applies to both 1: 1 planning and 1: n planning: if one associated work assignment is defined as an appointment booking, the corresponding order is also defined as an appointment booking.
Assigned hours	This field is only applicable and editable when the **Multiple work assignments** license and setting is activated (to enable *multiple work assignments* on an order). Precondition: The **Original budgeted hours** field on the order must contain a value. The **Assigned hours** field displays the calculated number of hours needed by the tradesperson to carry out the work assignment. For more information, see Budgeted hours' based resourcing.
Default work assignment?	Indicates whether this work assignment was based on a work order that existed before you upgraded to work assignments. It will be used for synchronizing existing jobs that do not have work assignment information yet.
Effort	ℹ This field is only applicable and editable if the 'Resource PlannerPro' license for **Work assignments** is not activated.
	Displays the number of hours needed to complete the work assignment. Any changes to the tradesperson or the **Start date-time** will lead to recalculating the **End date-time**.
Ended on	Date-time stamp for ending the work assignment. A work assignment is considered 'ended' if the back-office sets a final status (**Declined**, **Temporary fix**, **Stopped** or **Done**). This field does not take into account the **Action date-time**.
Expected arrival date-time	Displays the expected arrival date-time entered by the tradesperson / engineer on accepting the work assignment.

Field	Description
Internal tradesperson	Select the tradesperson / field engineer who must carry out the work assignment.
Keep in sync?	Technical field, used to update the order with data from the work assignment or vice versa.
Key work assignment	Indicate whether the work assignment is a key work assignment.
Order	Displays the order to which the work assignment is linked.
Planned end date-time	Specify the date and time at which the work should be ended. The end date-time is calculated automatically if the **Effort** or **Assigned hours** fields are filled in. This date-time is based on the time zone of the selected property.
Planned end date-time (user)	Specify the date and time at which the work should be ended. This time represents the time zone of the user.
Planned start date-time	Specify the date and time at which the work should be started. This date-time is based on the time zone of the selected property.
Planned start date-time (user)	Specify the date and time at which the work should be started. This time represents the time zone of the user.
PMFS status (AppSuite only)	Displays the processing status of the PMFS work assignment: • **Empty**: the work assignment is either not on the device, or on the device, but not yet accepted or rejected. • **Accepted**: the engineer has accepted the assigned work assignment (job) on the mobile device. Even if the engineer works offline, the job will remain on the device. • **Finished**: the engineer has *ended* the work assignment on the mobile device (End work, Discontinue, Temporary fix, Reassign or EHS declined). After changing to this status, both the work

Field	Description
	assignment and order are updated with the data added by the engineer. The job is removed from the device.
	• **Retracted**: the work assignment has been successfully retracted by the back-office.
Reason	If an action + reason has been configured for the this work assignment's status, the **Reason** field refers to the reason entered by the tradesperson / engineer on a specific action (status transition).
Reason for sign-off refusal reason	Displays the reason entered by the customer when refusing to sign-off the job on the tradeperson's / engineer's mobile device.
Retracted by back-office?	This field is set to **Yes** if a work assignment is stopped by the back-office, while it was already accepted by the field engineer. There may still be job data on the device. A warning is shown in Planon ProCenter that job data will be retracted upon the next synchronization of the device. On the app, the field engineer is informed that the job has been retracted by the back-office. The job data is automatically sent to the back-office. Once processed, the **PMFS status** field is set to **Retracted**.
Status	Displays the system status of the work assignment.
Trade	Reference to the trade that applies to the work assignment.

Order fields

The following table shows the main fields involved in your order administration.

Field	Description
General	
User-defined type	Displays the user-defined version of the **Orders** business object. See also Order types.
Status	Displays the order's status, as selected on the action panel. All order types have predefined

Field	Description
	statuses and status transitions that can be used to indicate in which phase a particular task is. Status transitions are user-definable and can be configured to suit your specific situation.
	If so configured, Planon ProCenter will ask you if a job ticket (or other order form) should be generated upon a status transition, for example from status **Reported** to status **Accepted**. If the answer is **Yes**, you can send the tradesperson responsible for repairs a job ticket by email.
	Special symbols denoting the current order status may have been assigned to the order descriptions in the elements list. For example:
	▶ Request in progress
Number	Displays the automatically generated order number.
Standard order	Select the standard order that you want to apply to your order. The standard orders displayed in the list depend on the order group selected at the **Components** level. Skip this field, if you do not want to apply a standard order.
	If you add a suborder to an order that is based on a standard order, all standard orders of the order group that have been completed for the main order are displayed.
Order group	Select the order group to which an order belongs.
	For this field, the Planon ProCenter administrator can also specify a default value.
	For more information on default values, refer to the *TSIs* and *Field definer* documentation.

> **ⓘ** Select a priority from the list to specify the term within which an order must be carried out. For more information, see Priorities, (Supporting data) .

Field	Description
Budget	The budget to which the order costs are booked. The field can only be completed if the Budgets TSI is available in your configuration.
Effort	This field is only applicable and editable if the **Multiple work assignments** license and feature are <u>not</u> activated. It displays the number of hours needed to complete the order. Any changes to the

Field	Description
	tradesperson or the **Start date-time** will lead to recalculating the **End date-time**. Any updates of this field will also affect the value in the **Planning status** field. See Planning status on Orders - conditions for more information.
Assigned by	The person for whom an order is completed (and who is charged for it). An option can be chosen from a pick list including all addresses of this type in the Addresses TSI.
Trade	Select a specific trade from the list, to link to the order.
Reassign to	Select a trade from the list to reassign the request / order rejected by the selected trade.
Cost category	The cost category, for example catering or automation, can be selected from a pick list.
Project	In this field you can select one of the available projects from a pick list. For more information, see Creating projects.
Approved by	The person who must authorize the order. For this field a pick list is available, containing people from the Personnel TSI.
Linked order	By using this field, you can link another order or request to the active order. If the related order/ request is deleted, this field will be emptied.
All suborders completed	This read only field indicates, if all suborders under an Order are completed / canceled. The field is set to **No** by default. However, if all suborders are set to administratively completed or canceled status, this field is automatically set to **Yes** on the main order.
	If an order flow is applied to the order, canceling the (last) suborder will not set this field to **Yes**, since the order flow is not completed yet. In order to set this field to **Yes**, the order flow must be completed manually by canceling its end events. For more information, see Applying an order flow.
Communication logs	Displays an overview of all the communication logs of the order. The communication added by the logged in user is shown to the right and any other communication is shown to the left of the **Communication logs** field.

Field	Description
Internal coordinator	Select a person from the list. The person in the organization responsible for completion of the order can be selected in this field.
External coordinator	An external person responsible for coordinating the task can be selected in this field.
External company	If an order is completed by an external company, select the relevant company's address from the list. Use the available filter options to retrieve the right **External company**.
Internal tradesperson	Select the employee responsible for carrying out the order. The **Internal tradesperson** field typically refers to an employee who is (going to be) assigned to the (maintenance) work described in the order, such as technicians, field engineers, inspectors, etc.
Contract	This field refers to the contract linked to the order. A contract can be selected from a pick list.
Contract line	This field refers to the contract line linked to the order.
Cost center	Select a cost center for the order from the list.
Created by	Enter the name of the person entering the order, if this person is logged on to the system under a valid user name.
Requestor	Select a requestor from the list. The requestor is the person reporting the order.
	When selecting the requestor, any additional information related to the requestor as defined in the **Information text** field on the **Persons** layout is displayed as a pop-up. For more information, see Displaying additional requestor / asset information on an order.
External requestor	Select an external requestor. The dialog box enables you to select an external requestor or to add people to the list of external requestors.
Property	From the list, select a property where the order must be carried out. Use the filter options for a targeted search.

> ℹ️ If you have selected a rentable unit, this field will be automatically updated with the related property.

Field	Description
Property zone	From the list, select an area/zone to which the property belongs.
	Using the property zone, a single request can be created (instead of creating multiple requests) for the same problem at different premises in an area.
	Selecting a zone improves usability, responsiveness and productivity.
Floor	From the list, select the floor where the order must be carried out. Use the filter options for a targeted search.
	ℹ️ If you have already selected a property, the list will automatically display the floors available in that property. If the **Property** field is empty or if a floor belonging to another property is selected, the **Property** field is populated with the relevant property of the selected floor.
Asset ID	Select the asset from the list to which the order belongs. Use the filter options for a targeted search.
	When selecting the asset ID, any additional information related to the asset as defined in the **Information text** field on Asset and building elements layout is displayed as pop-up. For more information, see Displaying additional requestor / asset information on an order.
Rentable unit	Select a rentable unit from the list. Use the filter options for a targeted search.
	ℹ️ Based on the selection in this field, the property field will be automatically updated.
Reservation unit	Link a space unit or asset unit to the order.
	ℹ️ If the selected reservation unit is linked to a default calendar, the working days and hours of that default calendar will apply to the order.
Assessment definition	If you want to plan and perform assessments using orders, select a relevant assessment definition in this field. By linking an assessment definition to the selected order you make it possible to prompt field staff to perform the assessment via PMFS. See: Planning and performing (mobile) assessments via a work order.

Field	Description
Follow-up action details	This read-only field displays the follow-up actions (if any) that are linked to the order, with their latest status information.
Number of people	Enter the number of people for whom a space unit is booked. This field refers to reservations only.
Asset group	Information on the asset group to which the asset specified in the **Asset ID** field belongs. The contents of the field cannot be modified.
Quotation date	Specifies the date on which an order is given the **Order proposal** system status.
Date accepted	Specifies the date on which an order is given the **Order accepted** system status.
Technically completed on	The date on which an order is given the **Order technically complete** system status.
Administratively completed on	The date on which an order is given the **Order administratively complete** system status.
Date-time coloring	Contains the date-time (in the time zone of the property) that is used to color the order when order coloring is turned on.
	By default, this field will obtain the value of the **Requested completion date** (on save). However, the user can manually modify it, if required.
	For more information on coloring the orders, see Priority coloring (Supporting data).
Related assets	Displays all the assets linked to the selected order. Archived related assets are also displayed when **Include archived records** is selected to **Yes** in Order business object settings.
	For more information on the setting, see General order settings (Field definer).
Related records	Displays all the records linked to the selected order. Archived related records are also displayed when **Include archived records** is selected to **Yes** in Order business object settings. For more information on the setting, see General order settings (Field definer).

SLA fields

Field	Description
SLA service	If a request or order is entered and the **SLA service** field is also completed, Planon ProCenter checks whether the service is linked to a service level agreement (SLA) and whether the SLA is linked to an SLA contract line. If this is the case, all SLA information, such as costs and response time is copied to the request/order.

> ℹ️
> - You can link an SLA service to a standard request/ order in Supporting data . If a help desk employee enters a new request or order that is based on this standard request/ order the **SLA service** field is populated automatically.
>
>   For details, see Creating standard requests/orders, (Supporting data).
>
>   For details on creating SLA services, see SLA Management.
>
> - To display a limited number of services with a valid SLA based on the data entered in the order, select **Only display services with a valid SLA** to display in the **SLA service** dialog box.

Field	Description
SLA	This field is automatically populated with the SLA linked to the SLA service when the SLA is applied to an order or request.
Reported on	Displays the date and time when the order was added.
Requested response date-time (user)	Specify the date and time at which the service provider should respond to the order. This time is initially calculated using the SLA's **Time to respond** on the basis of **Original reporting date-**

Field	Description
	time. If this is not specified, the **Reported on** date is used.
Requested response date-time (property)	Specify the date and time at which the service provider should respond to the order. This time is based on the time zone of the selected property.
Requested completion date-time (user)	Displays the date and time at which the order should be completed. This time represents the time zone of the user.
Requested completion date-time (property)	The date and time when the order completion is due. This time represents the time zone of the property. This field is updated only if the *Multiple time zones* feature is enabled.

> ℹ For more information, see Multiple Time Zones.
> This date-time is initially calculated using the **Priority** of the order on the basis of the **Original reporting date-time**.
> If this is not specified, the **Reported on** date is used.

Field	Description
Actual response date-time (user)	Specify the actual date-time at which the service provider responded to the order. This field is updated only if the *Multiple time zones* feature is enabled.
	The **Actual response date-time** is automatically calculated and populated when the status of the order is changed to **Order accepted** (applies to work orders) or **Request in progress** (applies to requests). If required, you can change this date-time.
Actual response date-time (property)	Displays the actual date-time at which the service provider responded to the order. This time is based on the time zone of the selected property.
Actual completion date-time (user)	Use this field to specify the order's actual completion date-time. This field is updated only if the *Multiple time zones* feature is enabled.
	The **Actual completion date-time** is automatically calculated and populated when the status of the order is changed to **Order technically completed**(applies to work orders) or **Request completed** (applies to requests). If required, you can change this date-time.
Actual completion date-time (property)	Displays the order's actual completion date and time. This date-time is based on the time zone of the selected property.

Field	Description
Original reporting date-time	Enables you to specify a date-time that should be considered as the date-time at which the order was entered. When entered, this date-time is used to: • calculate the **Requested response date-time**, **Requested date-time to attend**, **Requested date-time to fix**, **Requested completion date-time** of the order • search SLAs > ℹ If the above calculations are based upon the (planned) **Start date-time**, they are not affected by the **Original reporting date-time** and this field is therefore made read-only. If no **Original reporting date-time** is specified, the **Reported on** date-time will be used in the above calculations. If an SLA is applied, this field can only be changed for existing orders if the order has not been processed yet (still in the **Reported** status).
SLA priority	Specify a number to search for an SLA. By specifying an SLA priority for the order, a specific SLA can be found via the SLA scope.
Weighting	Specify a number to indicate the importance of the order. Based on the weighting, the completion time score and response time score are calculated. The value in the **Weighting** field can also be adopted from the SLA.
Completion time score	Displays the completion time score calculated based on the weighting. This score indicates if the order has been completed in time or too late. If the **Actual completion date-time** is less than (or equal to) the **Requested completion date**: Completion time score = Weighting If the **Actual completion date-time** is greater than the **Requested completion date**: Completion time score = (-1 * Weighting)
Response time score	Displays the response time score calculated based on the weighting. This score indicates if the response on the order was in time or not.

Field	Description
	If the **Actual response date-time** is less than (or equal to) the **Requested response date-time**: Response time score = Weighting
	If the **Actual response date-time** is greater than the **Requested response date-time**: Response time score = (-1 * Weighting)

Health & Safety fields

Field	Description
EHS required?	Select **Yes** if the field engineer has to acknowledge health and safety information when working on the order.

> ℹ Only applicable if the **EHS check required** order setting in the Planon AppSuite is set to **EHS required**. For more information, see *Planon AppSuite - Configuration Guide*.

PMFS / AppSuite fields

Field	Description
Location description	Enter the details of the location where the order is to be carried out. This will enable you to register enhanced information of the location.
PMFS status	Displays the processing status of the PMFS order (AppSuite only): • **Accepted**: the engineer has accepted the assigned job on the mobile device. • **Finished**: the engineer has completed the job on the mobile device.

> ℹ If there are multiple work assignments linked to this order, these will have their own PMFS statuses. In that case, this order field becomes obsolete.

Field	Description
Appointment booking?	Click **Yes** 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, its start date is fixed.

> ℹ If you are working with *multiple work assignments* (licensed feature), this field is set to **Yes** if one of the order's work assignments is an appointment booking (its **Appointment booking?** field is set to **Yes**). See the *Work Assignments* documentation for

Field	Description
	information on the relation between orders and work assignments.
	ℹ️ If the **Start date-time** of the order is not filled in, the order will not show as appointment booking on the mobile device. In the PMFS app, field engineers can recognize appointment bookings by their icon. They should not start earlier or work longer on the order without consulting the customer first.
	The default setting in this field is **No** (no fixed start date).
High priority?	Click **Yes** 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 orders by their icon in the PMFS app.
	The default setting in this field is **No** (no high priority).
	ℹ️ 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 a merged icon.
Sign-off required?	Click **Yes** if it is required that the customer signs off the job on the mobile device of the field engineer, to acknowledge that the work was completed as agreed.
Sign-off by engineer required?	Click **Yes** if it is required that the engineer signs off the job on the mobile device upon completing the job, to acknowledge that the job has been fully executed.

Service Providers related fields (including Subcontractors)

Outsourced assignment	This field is only available on planned maintenance (PPM) orders. It is a reference to an **Outsourced assignment** on a contract with a subcontractor.
Subcontractor	This field is only available on planned maintenance (PPM) orders. It is a reference to the subcontractor by whom the PPM order is carried out. The link with the PPM order comes from an **Outsourced assignment** (= subcontractor contract line) on a **Subcontractor contract**.

Field	Description
Team	Reference to a linked service team. If **Allocation agreements** are configured and used within the Service Providers solution, the team will be automatically detected upon creating / generating a work order or PPM order.

Work assignment related fields (Multiple work assignments feature enabled)

Field	Description
Original budgeted hours	Enter the number of hours you originally had available as the 'time budget' for the entire order. Each time a work assignment is created, with its own number of assigned hours, these hours are subtracted from the original budgeted hours on the order.
Remaining budgeted hours	Shows the number of budgeted hours that has not yet been spent on the order.

Planning fields (Orders, PPM orders, Move orders)

Field	Description
Planned start date-time (work assignment)	Displays the date and time at which the work assignment should start. This date-time is based on the time zone of the selected property.
	After the **Multiple work assignments** feature is enabled, this field can become editable and be populated under the following conditions:
	• the order's **Internal tradesperson** and requested **Start date-time** are filled in, while the **Planned start date-time** is still empty and there are no active work assignments.
	• the work assignment's **Start date-time** is populated.
Planned start date-time user (work assignment)	Read-only field that displays the date and time at which the work assignment should start. This date-time represents the time zone of the user.
Planned end date-time (work assignment)	Displays the date and time at which the work assignment should end. After the **Multiple work assignments** feature is enabled, this field can become editable and be populated under the following conditions:
	• the order's **Internal tradesperson** and requested **End date-time**

Field	Description
	are filled in, while the **Planned end date-time** is still empty and there are no active work assignments.
	the work assignment's **End date-time** is populated.
Planned end date-time user (work assignment)	Read-only field that displays the date and time at which the work assignment should end. This date-time represents the time zone of the user.
Planning status	This read-only field shows the most recent planning status of the order: - UNK, Unknown - UNP, Unplanned - PPL, Partially planned Note: this status is only available if multiple work assignments are allowed on an order and at least one of them is planned. - PLA, Planned - REP, Requires replanning Which planning status is shown, is based on the time that has already been spent on the related work assignment(s). See Planning status on Orders - conditions for detailed information. Upon completion or cancellation of the order, this field is cleared.
Total no. of assigned hours	Displays the total number of assigned hours of all work assignments.

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