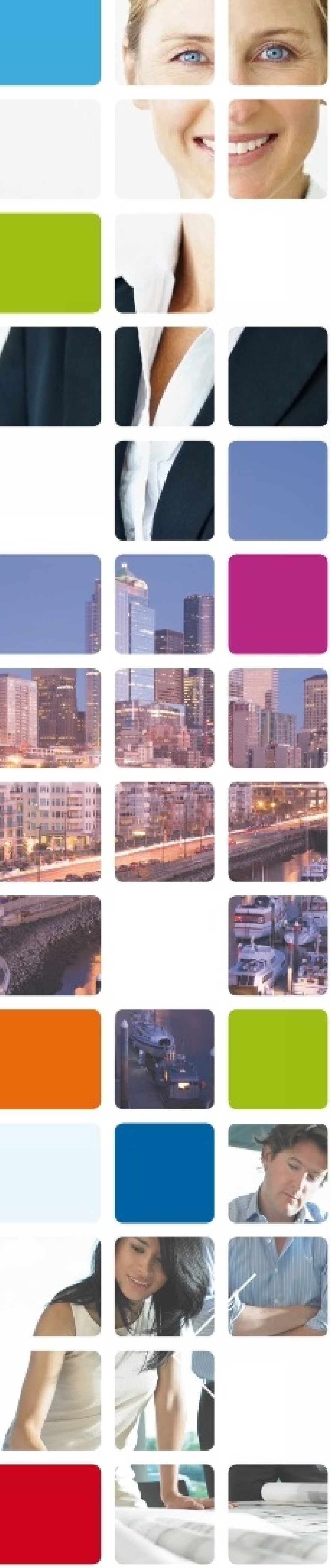


# Essentials Edition

Version: 1.0

# Planon AppSuite

# Table of Contents

# About the Planon AppSuite app for Field Services

The **Planon AppSuite** for Field Services is an app that holds various app modules. The availability of some modules is licence-dependent.

- The **My jobs** module. This is a mobile job list for you, the field engineer, with many actions and features that keep you connected with the back-office while working at remote locations. With every action you select or feature you use, essential time and cost related information is updated and sent to your back-office when you are finished.

  The features in **My jobs** include:

  - labor hour registration
  - registration of materials used
  - taking photos
  - QR code / bar code capturing
  - zooming in on location information
  - and much more...
- The **Materials** module. With the special *PMFS PRO license*, the **Planon AppSuite** app also includes the **Materials** module. The **Materials** module is a read-only overview of the materials planned or requested for the jobs assigned to you, complete with inbound and outbound materials and a product catalog. Optionally, your vehicle can be configured as a mobile store, with materials management functionality.
- The **Service requests** module. This module is available by default in the **Planon AppSuite**. As a field engineer, you can use this module to report any new issues you may find, whether you are online or not.
- The **Assets** module. The *Planon Mobile Asset Viewer* license gives access to the **Assets** module. This module enables you to search the Planon database for relevant asset information. It can be used in combination with the other Field Services modules, but can also be used independently.
- The **Properties** module. The *Planon Mobile Property Viewer* license gives access to the **Properties** module. This module enables you to search the Planon database for relevant building information.

## Installing the Planon AppSuite app

The **Planon AppSuite** app is available for tablets and smartphones (portrait mode) with an iOS or Android operating system:

- **iPad**: Download the **Planon AppSuite** app from the **iOS App store** and install it on the device.
- **Android tablets**: Download the **Planon AppSuite** app from the **Google Play store** and install it on the device.

# Logging in

The following steps describe how to log on to the Planon AppSuite app:

## Procedure

1. Tap the **Planon AppSuite** icon on your tablet.
2. The login screen opens.
3. In the **URL** field, enter the site URL and site code of the environment you want to connect to, separated by a forward slash.

   ***https://[your site URL]/[site code]***

   In a Planon Accelerator environment, the URL looks similar to this: ***https://yoursite.planoncloud.com/BP***

   Your Planon administrator can provide you with the correct URL.

> Planon administrators can refer to the *Planon AppSuite - Configuration Guide* for information on how to put together the 'domain URL' for end users.

4. Tap **Log in**.

At this point, there are two possible scenarios:

1. You are required to use the default Planon login method by entering your user name and password.
2. You log in through an identity provider (single sign-on).

   In this case the application will redirect you to the login page. Once logged in through that login page, your user session is controlled by the identity provider.

You are logged in and can start working with the app.

# Logging off

> If you close the app, you will not be logged off yet! To achieve this, you must use the log off button.

When you log off from the Planon AppSuite app, the system will check if there are jobs that are **In progress** (work orders or planned maintenance orders) or similar unsynchronized work. If unsynchronized work is found, you will be warned and shown a list of the modules containing the unsynchronized work. You can 'jump' to the module(s) concerned by clicking on it/them. You can assess the order data, make the necessary changes and send the order to the back-office by changing the status. If you log off without synchronizing your work, data loss may occur.

Job data should be synchronized to the back-office before logging off, to prevent data loss. That is why you are prevented from logging off if you are working *offline*. After you have reconnected to the internet you can synchronize the data and log off.

# Updating the application

## Hot code push procedure

AppSuite checks on login and on each online action if the AppSuite version still matches with Planon Essentials (the back-office).

If not, the hot code push procedure will be triggered. During the **Updating application** process, the files that need to be updated in Planon AppSuite are downloaded. After the hot code push procedure is completed, you can synchronize data between AppSuite and the back-office. If the hot code push fails, your jobs cannot be synchronized. In that case, contact your system administrator.

# Viewing logging data on your mobile device

On your mobile device you can view logging data that may be required for problem analysis. The **Settings** screen displays the most recent logging data.

## Procedure

1. In the app, tap the hamburger menu icon:

   .

2. Click your account name.

   The **Settings** screen opens, with version information and logging data.

3. View the AppSuite logging.

   The Planon Support department may request this information for analysis.

4. Tap **Copy to clipboard**.

   From the clipboard, paste the information in your communication to Planon Support.

# Switching sites

If your user account is linked to multiple Planon sites, you can switch to a different site in the app. You cannot switch sites if your mobile device is offline.

Switching is possible even if the new site is linked to a different Planon 'property set'. A property set is a *set of data comprising specific properties (buildings)*. Depending on your user group authorizations, you can work in one or multiple property sets.

### Procedure

1. In the app, tap the hamburger menu icon:

   .

2. Tap the **Switch site** button.

   The **Switch Site** screen opens, listing the sites to which you have access.

3. Tap the relevant site.

   The data from the current site is sent to the back-office and you are directed to the selected site. Pending jobs from the previous site are reassigned to you, so you can work on them later.

# Retrieving the Privacy statement

If your organization has provided a link to the corporate privacy statement, via the corresponding setting in the **System settings** TSI, you can retrieve and view this statement in the AppSuite app.

Procedure

1. In the app, tap the hamburger menu icon:

   .

2. Tap your user account name.

   The **Settings** screen opens.

3. Tap **Privacy statement**.

   You are directed to the site with the privacy statement.

You must be online to be able to open the URL to the privacy statement.

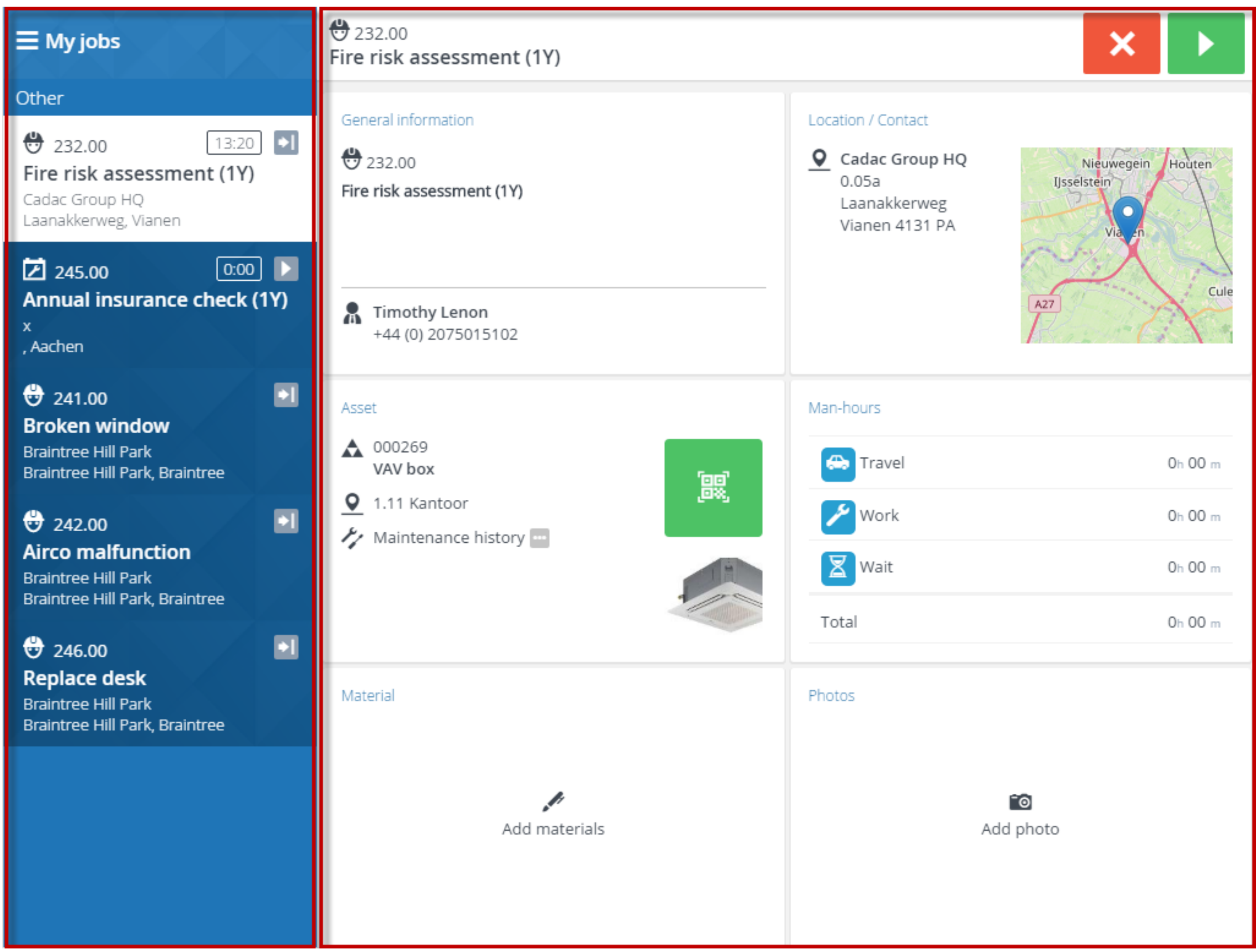
# Field Services

**Field Services** is a vital link in the chain of field workers, enterprise office systems and customers. The Field Services **My jobs** module gives you, the field engineer, real-time access to information that is available in the enterprise system. Regardless of your location, you can receive important and up-to-date information with regard to work orders (jobs), locations, materials and assets. As a result, you arrive at the customer's in time, with the right equipment and information to complete your jobs quickly and efficiently.

## My jobs

The screen layout is designed to give you an optimal overview and control over your work. All essential information and functions are accessed from the main screen, which is divided in two:

- **My jobs**, containing the actual job list
- the job summary, giving access to blocks with the selected job's details



The **job list header** includes a menu button. Tapping this button will show the menu side bar, where you can log out of the app. The **job list** itself is ranked by date-time and whether jobs are **High priority** ( ). Icons indicate the job's type and status. You start by selecting and accepting a job from this list. See Job icons for more information on the icons.

You can search through the job list by using the filter. See Filtering the job list.

If the scheduled date of a job passes and you have not picked it up yet, this job is moved to a separate, highlighted **Overdue** section, just below the jobs in progress. This means it is time to take action: you may need to consult with your back-office and either accept or reject the job.

The **summary header** shows all details of the job you have selected and give access to the action buttons you need to change a job's status, for example to accept or reject the job, to start, travel, pause, discontinue and so on. The **summary** itself consists of several **summary blocks**, each offering essential pieces of information and interaction on the selected job.

Screen layouts in the user information may deviate slightly from your actual screen, due to updates and improvements to the app.

# My jobs information blocks

**My jobs** information blocks summarize the most recent pieces of information and interaction on a selected job. You can access more detailed information and functionalities by tapping a card.

## General information

The **General information** block displays:

- name and code of the asset that requires servicing
- name and contact details of the requestor
- any additional notes from the back-office

## Date and time

The **Date and time** block displays the time-related information of the job.

Since you work on site, all date-time fields refer to the timezone of the building where you are currently working. For example: if you work on a job in London, date-time fields will display GMT.

## Location / Contact

The **Location & contact** block displays the location and contact details of the customer. Tapping the **Map** button will open the map with the geographical details of the maintenance site. Tapping the **Information** button will open a screen with the full location details, if provided by the back-office. Tapping the **Location & contact** card itself will open a **Details** screen with both map and location description.

### Asset

The **Asset** block displays important information on the asset to be maintained. Scan its QR code / bar code for verification purposes. If applicable, add meter readings for the asset.

### Labor hours

Use the **Labor hours** block to view the automatic labor hour registration or to manually add additional labor hours for yourself or others.

### Materials

Use the **Materials** block to view which materials are prescribed for the job and to register any additional materials used. This is sent to the back-office to update the cost registration.

### Photos

Use the **Photos** block to take photos, add them to the job and send them to the back-office.

### Comment

Use the **Comment** block to add comments on the job and send them to the back-office.

### Internal communication

The **Internal communication** block shows your most recent chat with the back-office and - if applicable - other field engineers working on the same job. Tap the chat icon to add a new message. Tap anywhere else in the block to access the complete message chain.

### Documents

If any documents are attached to the job, you can access and view them in this block, before and after accepting a job. The supported file formats are .PDF, JPEG, .JPG, .PNG. Provided you are working online, you can open the listed files in their default application or access an external link to documentation by tapping the relevant URL.

> When opening a file, it is downloaded and stored on your device temporarily. When you navigate from the document's details back to the overview, the cached documents are removed from the device for security reasons.

### Questionnaires

If any questionnaires are attached to the job, you can access and complete them here.

### Health & Safety

If there are health and safety concerns at the job location, a basic set is displayed here.

> Only if your organization works with the below solution extensions (SXs), this basic set of health & safety information will be displayed:

> MM-01 Create risk assessments and method statements in order documents

| |
|---|
| MM-02 Create permits to work sub orders |
| MM-03: Synchronize Risk Assessments, Method Statements and Permits to Work with pick-lists |

For more extensive health & safety information on the app, see Health and safety information at a job.

# Job list

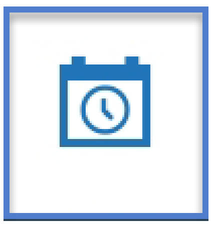
The job list in the **My jobs** module shows a list of jobs which are assigned to you.

The job list displays the 100 most relevant jobs, sorted by the following criteria:

- *Current* jobs are ranked higher than *future* jobs
- *High priority* jobs are ranked higher than *low priority* jobs
- *Reactive* jobs are ranked higher than *planned* jobs
- Jobs assigned to you *personally* are ranked higher than *team* jobs.

- There are two views for the job list:

  **Calendar view** - groups and lists your jobs chronologically (groups: In progress, Overdue, Paused, Today, Tomorrow, Other). In this view, you can set filters, to quickly search the job list by various criteria. See Filtering the job list for more information.

  **Unsynchronized view** - displays jobs pending for synchronization. These jobs are still on the device, because sending them to the back-office failed. See Synchronizing data for more information.

# Job icons

| Icon | Description | What it does |
|---|---|---|
|  | Reactive work order | Indicates that the job is a reported failure or disruption that needs fixing. |
|  | Planned maintenance order | Indicates that the job is part of a maintenance plan. |
|  | Team order | Indicates that this job is sent to a whole team. The first team member to accept the job will pick it up, after which it is removed from the tablets of the other team members. |
|  | High priority | Indicates that the job must be picked up urgently. This icon is displayed alongside the job type icon. |
|  | Appointment booking | Indicates that the job is part of an appointment with the customer. This icon is displayed alongside the job type icon. |
|  | Health and safety indicator | Indicates that health and safety information is available. You should take note of it before picking up the job. |

# Health and safety information at a job

If health and safety information is available for a job, it is indicated in the job list by the icon.

The icon indicates that you must first *acknowledge* the health and safety information before starting your work.

## Procedure

1. Select the job view the job information and tap **Accept**. The **Health and safety check** screen is displayed.
2. Again tap **Accept**, to start the check.
3. Tap the **Health & safety** summary card, which may display the following items:
    - **Hazards**
    - **Permits**
    - **Work-related activity types**
    - **Risk assessments**
    - **Method statements**

> The summary card is only displayed if the setting **Show EHS card?** is set to **Yes** in the PMFS settings. For more information, see *Planon AppSuite Configuration Guide* > *EHS*.

The **Health & safety** details screen displays all the hazards related to the job, generally categorized and sequenced: Activity-related, Asset-related, Space-related, Property-related.

> The sequence in which hazards are displayed, depends on the information available on the order. For example:
> - On orders with an activity link, the activity-specific hazards are displayed first.
> - On orders with only a property link, the property-specific hazards are displayed, as well as a hazard count per hazard type for the spaces and assets.
> - On orders with a space link, the space-specific hazards are displayed first, followed by the space's asset and property hazards.
> - On orders with an asset link, the asset-specific hazards are displayed first, followed by the hazards related to the asset's space and property.

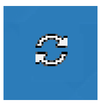
4. Tap the down arrow on each category to expand and view a detailed list of the related hazards.
5. Tap items to view their details:
    - The **Hazard information** screen will always show the most recent photo of the hazard (linked via a hazard communication log). This photo can also be viewed when you are offline.
    - The **Method statement** and **Risk assessment** detail screens give access to any linked documents (communication logs), which can be viewed on your device.
6. Use the navigation arrow **<** to return to the main screen.

# Synchronizing data

The **Synchronize** action will update the job list and the job details of the selected job on the device. Ended jobs that were not sent yet, will be sent to the back-office.

> Data of jobs that are **In progress** are only sent after ending the job.

You can manually synchronize the data by tapping the **Synchronize** button at the top of the **My jobs** list:



On the device, the following items are updated by the **Synchronize** action:

- the job list itself
- the data of the selected job
- field data, if changes were made by the back-office
- planned materials, if they were added / changed / deleted by the back-office
- communications / comments, if they were added / changed / deleted by the back-office

The back-office is updated by the **Synchronize** action with:

- Status changes
- Ended jobs (including all job data)
- Paused jobs a with finalized time registration

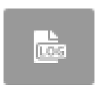
  See What is synchronized when? for more details on app actions that trigger automatic synchronization and the fields that are updated. If synchronization fails for whatever technical reasons, see What if synchronization fails?.

# What if synchronization fails?

If synchronization fails for whatever technical reason, any data you were trying to send to the back-office will remain on the device. You can view these jobs by tapping the **Unsynchronized view** icon at the bottom of the job list:

You can always try to synchronize later when you expect the failure to end. You can no longer edit the data, because unsynchronized jobs are ended.

There are two buttons that can assist you in solving synchronization issues in the **Unsynchronized** view:

-  **- Send job**: to send a single unsynchronized job to the back-office. Planon Support can subsequently perform a data analysis.
- 

  **- View job data**: to view and copy the unsynchronized job's data in JSON format. Planon Support may require you to copy and mail the data for analysis.

# What is synchronized when?

Between Planon Essentials (the back-office) and Planon AppSuite (field engineer) data and statuses must be frequently synchronized. At various occasions this is done automatically, but field engineers can also synchronize manually.

In order to provide clarity about which actions trigger synchronization, see the following information:

| Action / situation (engineer is online) | ... triggers updates from / to the back-office |
|---|---|
| Select an **Assigned** job in list | Retrieves basic job data. |
| Click **Accept** button for a job | Downloads job data to the device (health & safety, materials, time registration, maintenance activities and checklists, photos, documents, questionnaires, chat history, related standard suborder). This data can now also be viewed offline. |
| Select an **Accepted** job from list | Automatically updates the job data. See **Updated job data** below. |
| Health & safety check on start work | If you start work and an EHS check is required, the latest health and safety information is retrieved from the back-office. |
| Click **Synchronize** button | Manual action to:<br>• send pending job data to the back-office,<br>• receive an updated job list,<br>• receive an update of the selected job.<br><br>If you were offline and go online again, synchronization is automatically triggered. |
| **End job** | Job data provided by the field engineer is now sent to the back-office (labor hours, used materials, requested materials, added photos, maintenance activities & checklist items, comments).<br>The job list is updated so that the field engineer can pick up the next job. |
| Logout | On logging out you are warned that you will lose any locally stored data. If you have been working offline, you must go online first and then synchronize, before you log out. |

**Updated job data**

On an **Accepted** job, the following job fields and details are updated via manual or automatic synchronization:

- Description
- Requested completion date-time
- Priority

- Requestor
- Internal Coordinator
- Internally Assigned By
- Planned start date & time
- Planned end date & time
- Requested TTA
- Requested TTF
- SLA
- SLA Service
- SLA Weighting
- Service Agreement Service
- Terms for time
- Contract code and description
- Contract line description
- Appointment booking
- High priority
- EHS Check required
- Important notice (field on Asset)

Field updates that depend on your App settings:

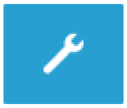
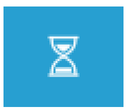
- Configured setting **Order date/time** (Planned start date & time / Requested completion date-time)
- Configured setting **Comment** field (Comment/Comments)
- Configured setting **Phone number** field (Person phone number)

Job details that are updated for an accepted job:

- Material lines (order lines, requisition lines)
- Internal communication (chat comlogs)

# Action buttons

| Button | Description | What it does |
|---|---|---|
|  | Accept | Status change to job **Accepted**. |
|  | Reject / Discontinue | Status change to return the job to the back-office and thus remove it from the job list. |

| Button | Description | What it does |
|---|---|---|
|  | Reassign | Status change to reassign the job to the team after initially picking it up. Any data you entered so far will be sent to the back-office. |
|  | Work | Status change to start working on the job. |
|  | Travel | Status change to start the registration of traveling hours. |
|  | Wait for customer | Status change to waiting, while continuing the labor hour registration (chargeable to the customer). |
|  | Pause | Status change to pause the job and stop the labor hour registration temporarily. |
|  | Temporary fix | Status change to indicate that the job is temporarily completed. |
|  | End work | Status change to indicate that the job is completed. |

# Working with the My jobs module

Precondition: the Planon AppSuite - app is installed on your device and you have logged in on the **My jobs** module.

## Filtering the job list

With the job list in **Calendar view**, you can use the search bar and filter options at the top, to quickly find specific jobs.

When online, you can use the combined search and filter mechanisms to query data from the back-office. This will give you access to **Assigned** jobs that match your filter settings. On the mobile device, the number of assigned jobs that will be displayed in the list is limited to the first 100 that match the filter. However, this limit may be exceeded, depending on the number of assigned jobs that are automatically categorized under **Overdue** and **Today**.

The app's performance may be affected if the query involves large numbers of assigned jobs.

**Filter**

The pop-up includes a drop-down menu, enabling you to filter the job list on:

- High priority only (Yes / No)
- Job type (All / Personal / Team jobs)

Once you accept a team job with the **Team jobs** filter activated, it becomes a personal job and disappears from the teams job list. Deactivate the filter or filter on personal jobs to see the job listed again.

- Order type (All / Reactive / Planned jobs)
- Orders before a specific end date

The filter is activated when you click **Apply**. The filter can be reset by clicking **Reset filter**.

**Search bar**

Simply add (part of) a search term, or multiple search terms separated by a space. Your search and filter settings are saved until you log off. Your search is not 'case sensitive' and will ignore special characters.

The following criteria can be (partially) entered as search terms:

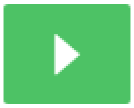
- Code (of job)
- Description (of job)
- City (of property)
- Property (description)
- Address (of property)
- Internal coordinator (linked to job)

Select the job you were looking for and continue with the procedure of Accepting a job.

If no filter is applied, the system list the assigned jobs by relevancy. See Job list.

# Accepting a job

- View the job list. See Job list.
- Select a job.
- View the job details on the blocks on the right.
- Tap the **Accept** button:

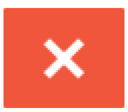


- Perform any Health & safety checks, if required.
- The back-office will see that you have accepted the job.

> The job's status updates are displayed as little icons next to the job in the job list and on the header.

# Rejecting a job

- View and assess the job list on the left.
- Select a job, view the job details on the blocks on the right.
- If you decide that you cannot pick this job up, tap the red **Reject** button.



- The job is removed from your job list and returned to the back-office.

# Traveling to a job

- Consult the **Location / contact** block of the selected, accepted job.
- With the job still selected, tap the blue **Travel** button to start the travel registration. It will run until you tap another action button.

# Starting a job

You have checked and acknowledged any Health and Safety information available on the job.

- Consult the asset information on the **Asset** block.
- Tap the **Work** button to start working on the job.

- If required, go through the steps of the **Health & safety wizard**. See Health and safety wizard.

The labor hour registration will start to run.

# Health and safety wizard

After you have accepted a job and there is a health and safety check on the order, the **Health and safety check** is displayed. The wizard informs you about the health and safety risks related to the job. You must go through each step of the wizard before you can start working on the order. Every time you start working on a job, the health and safety wizard is displayed. If you are offline, a warning message is displayed informing you that the hazard information may be outdated.

> If, for some reason, you are unable to comply with a **Health and safety check**, you can reject it by tapping the **Reject** button. You must enter a reason, after which the job is returned to the back-office.

1. Tap **Accept** to proceed with the **Health and safety check**.

   By tapping the **Health and safety** block, you can preview H&S information.
2. Start the job by tapping **Work**.

   The **Health and safety check** wizard is displayed.
3. Check if the displayed permits are valid.
4. Check the expected work-related activities that are displayed.
5. Add additional activities by tapping **Add** or delete activities as required.

> It is important that you update the list by adding/deleting activities, so that the appropriate health and safety information can be displayed.

6. On the **Hazards** step, take note of the hazard-related information.

> The display of these hazards depends on the job information. The most relevant hazards are displayed first. For example: if the job is related to an asset, asset hazards are displayed first. If the job is related to a space, space hazards are displayed first. If no hazards apply to the job, the steps are skipped.

7. If you encounter a new hazard, tap **Add** and enter data on this new hazard, such as hazard type, description, location, risk level and to what the hazard relates (activity, asset, space or property). Add a photo of the hazard.

   The new hazard will be added to **Hazard registry** in the back-office, with the field **Assessment required** set to **Yes**. The health & safety officer can assess the new hazard and determine its risk level or, if applicable, perform a full asbestos assessment. You can proceed with the next step of this procedure.
8. On the next step of the wizard, check the **Risk assessments** related to the job.

> The display of these steps depends on the health and safety situation of the job/workplace site. If no risk assessment apply, this step is not displayed.

9. On the next step, answer any linked questionnaires that are related to the risk assessments.

If the wizard includes a **Last minute risk assessment** (LMRA), you must fill in that assessment before you can pick up the work. See Doing a last minute risk assessment (LMRA) for the procedure.

10. Tap the **>** button.

    A message about complying with the health and safety information is displayed.

11. Tap **Acknowledge**.
12. Select the **Date** and **Time** and tap on the **Work** button to start working on the job.

# Doing a last minute risk assessment (LMRA)

The Last Minute Risk Analysis or LMRA is a brief but critical assessment of the risks associated with the work to be done. It is shown in the **Health & safety wizard**.

If an LMRA questionnaire is required, you must fill it in every time the **Health & safety wizard** is shown:

- On starting a job.
- On resuming a job.

Procedure

1. In **My jobs** select and accept a job.
2. Tap the **Work** button.

   The **Health & safety wizard** with the **Last minute risk assessment** is displayed.
3. Go through the wizard steps and answer the LMRA questions.

   Your answers will be logged at the back-office.
4. Tap **Acknowledge**.

   If you gave answers that will prevent you from starting / resuming the work, you can only tap **Reject** to send the job to the back-office for reassessment.

   If all questions are answered and acknowledged, you can start or resume your work. In case of doubt: contact your supervisor and discuss the situation.

# Pausing a job

- If you want to temporarily interrupt your job, for example for your lunch break, tap the **Pause** button. The labor hour-registration is now temporarily stopped.

- To resume your work and the labor hour registration, tap the **Work** button.

As a rule, your worked hours are not sent to the back-office when pausing a job. However, in some cases your organization may require that labor hours of paused jobs are sent to the back-office. For example at the end of the working day. If such an exception is implemented in the workflow, the reason you submit at the **Pause** action determines whether your worked hours are sent to the back-office or not. Once finalized, your labor hours are sent to the back-office. Finalized labor hours are displayed on the app, but cannot be edited or deleted.

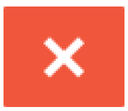
# Waiting for the customer

- If you are unable to start or continue your work, because there is an unforeseen delay due to the customer, tap the **Wait** button. The labor hour registration will continue.

- To resume your work, tap the **Work** button.

# Discontinuing a job

If you have started working on a job, but are not able to finish it, you can return it to the back-office, by tapping the **Discontinue** button:



In the subsequent pop-up, you must enter a date, time, the reason for discontinuing and additional comments. After confirming the **Discontinue** action, the job is returned to the back-office.

# Reassigning a job

If you are already working on a job, but discover that you are unable to complete the work before logging off, you may prefer to **Reassign**, instead of discontinuing and returning the job to the back-office (also see Discontinuing a job).

You have three options when reassigning a job:

- Reassign to myself - you can pick up the job on your next shift or later; the job is firt sent to the back-office and then returned to your device as a new job
- Reassign to another team member - a colleague will proceed with the job
- Reassign to the team - any one of your team members can pick up the job and proceed (first come, first served)

It is not possible to reassign to a team of which you yourself are not a member!

You can reassign a job by tapping the **Reassign** button:

In the subsequent pop-up you must select the relevant reassign option and enter a date, time, reason and any additional comments. After confirming the **Reassign** action, the job is actually reassigned. The back-office is informed about this via a communication log.

If the **Reassign** action is configured on your app and you are member of one or multiple teams, it is displayed once a job has been accepted.

If you must log off for some reason, it is important to first check the statuses of the jobs on your device, to prevent data loss.

# Asset information, meter readings and code scanning

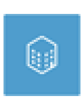
- Tap the **Asset** block on the job summary.
- View the photo, asset details and asset history.
- To enter meter reading details: tap **Add reading** at the relevant asset, and tap **OK**.
- To identify the asset: tap the magnifying glass icon to open the scanner and capture the QR code / bar code on the asset.

See Planon Supported Configurations for an overview of supported bar code formats.

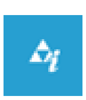
- If you cannot scan a QR code for some reason, enter (part of) the asset's code / tag in the search bar.

In **AppSuite** > **My jobs**, you cannot scan / search assets from other properties than the property registered on the job (asset location). If the scanned / searched asset is in a different building, the app does not find a result. If you then tap **Proceed**, in spite of the mismatch, a communication log on the scanned asset is sent to the back-office. They can determine how to update the information in Essentials: for example update job information, update the asset location, register a new asset, or decide that you scanned the wrong code.

- To open a 3-D model of the asset in the context of its location: tap the BIM viewer button.



- To 'jump' from **My jobs** to more detailed asset information in Planon AppSuite's **Assets** module: tap the asset information button.



This button is only displayed if you are licensed to use the **Assets** module. If your device is offline, the button is disabled.

- Use the navigation arrow **<** to return to the previous screen.

# Working with PPM orders and maintenance activities

If you select a *planned maintenance order* in **My jobs**, this order can consist of various parts that have to be completed in a particular sequence:

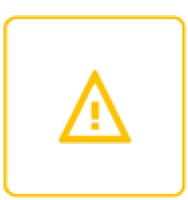
- There may be *health and safety documents* attached, such as risk assessments and work permits that have to be read and confirmed in advance. The supported file formats are .PDF, JPEG, .JPG, .PNG. If you are working online, you can open the listed files in their default application or access an external link to documentation by tapping the relevant URL.
- The actual order may consist of one or more *maintenance activities*.
- Maintenance activities are sorted by *asset code*, thus displaying activities on a main asset and any sub-assets together.
- Each maintenance activity can have linked *checklist items* that must be acknowledged.

## Procedure

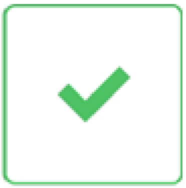
1. In **My jobs** select the planned maintenance order you want to pick up.
2. Tap the **Accept** button.
3. If applicable tap **Travel** to allow for traveling time.
4. When on site, tap **Start work**.
5. Tap the **General information** of this job.
6. View the general information, health & safety check and the maintenance activity/-ies for this job.
7. Tap a maintenance activity.

   A new view is opened, listing all maintenance activities for this job.
8. Tap a relevant maintenance activity.
9. View the information and assess the checklist items.
10. Tap the activity again to go to the details.
11. While working on the job, go to the checklist items and select a relevant status for each checklist item:

    **Assessed**

    or **Done**



12. Enter a reason and / or comment per checklist item as required and tap **Save**.
13. Repeat steps 5-12 for other maintenance activities.

    The completed maintenance activity (-ies) will be updated to **Done**.

14. On the maintenance activity, enter any comments either in the **Comments (job)** field or in the **Comments (activity)** field.

    Which of the two fields is displayed depends on your app configuration. The **Comments (job)** field sends your accumulated order comments to the back-office for storage on the order, whereas the **Comments (activity)** field sends your comments to the back-office in a separate communication log per maintenance activity.

> You can set your planned maintenance order to either **Discontinue**, **Temporary fix** or **End work** without having completed all maintenance activities. The back-office can reassign unfinished jobs, either to you at a different time or to someone else. Only the remaining, uncompleted maintenance activities will be displayed on the device.

# Using materials on the job

Upon starting a job, the **Materials** block will display the materials anticipated for the job, in quantities planned by the back-office. That does not mean that these are the actual materials and quantities you are going to use. The following procedures explain how you can edit planned materials or add new, unplanned materials.

# Planned materials

The back-office can register any materials that you may need for a job in advance. These are *planned* materials. It is possible to edit the used quantity of these material(s).

- Tap the **Materials** block on the job summary to view the materials that were initially planned for the job.
- Edit the used quantity as required, by clicking the plus or minus symbol in the **Used** column. You can also click the edit button and change the quantity in the **Edit material** pop-up.
- Tap the navigation arrow to return to the main screen.

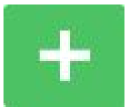
If you use less materials than you have picked up, you must return these materials. An overview of materials to be returned can be viewed in Outbound materials.

# Unplanned materials

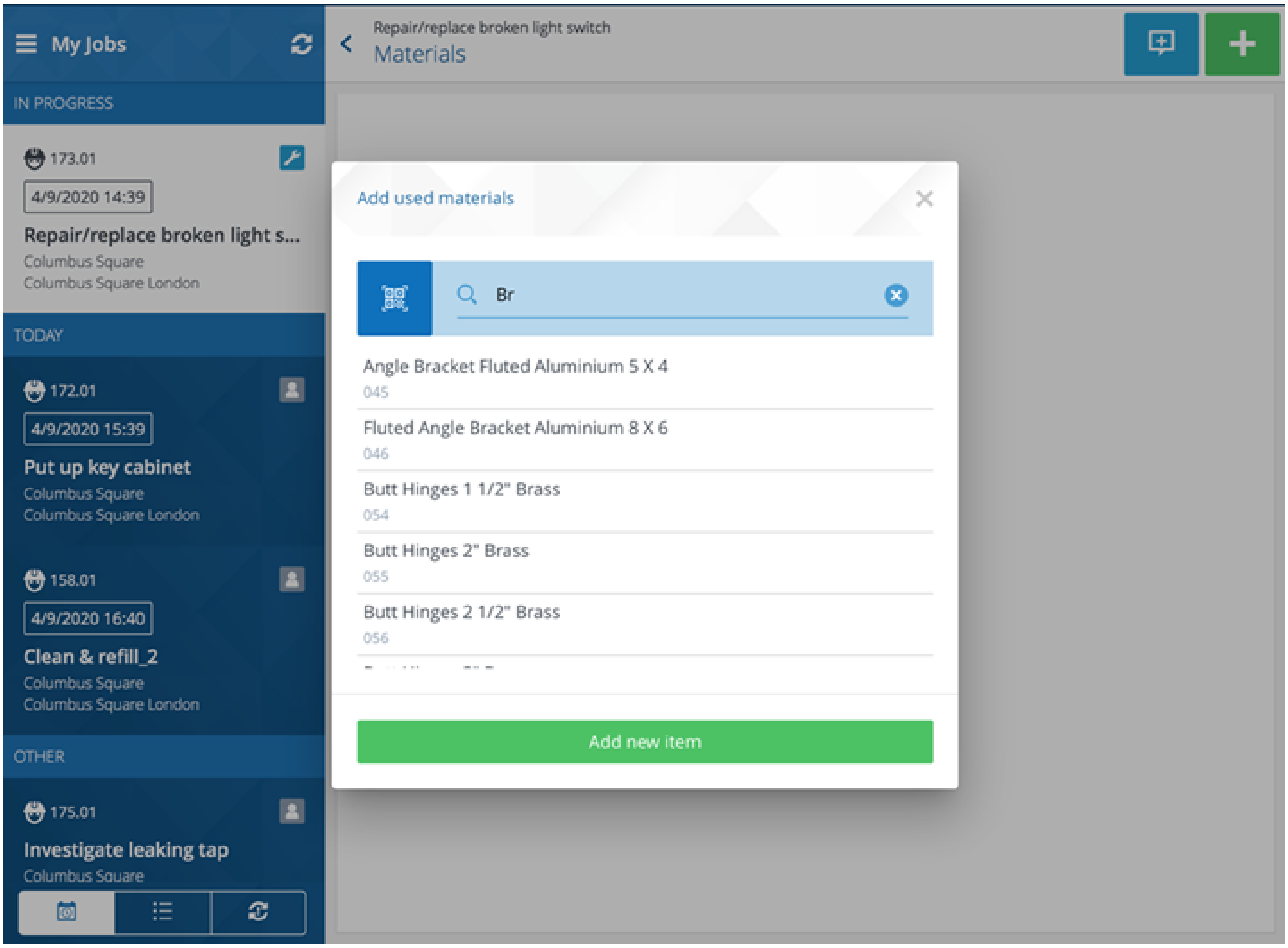
Besides planned materials, you may have to use *additional* materials that were not planned for. There are various scenarios:

You can use materials from your *mobile store*:

- Tap the **Materials** block on the job summary.
- In the **Materials** screen, tap the **Add used materials** button at the top right corner:



- In the search bar, start typing (part of) a search term in the search field to trigger a search action. Supported search terms are: product code / name, model type, brand, stock item code / name.
- If applicable, you can also use the QR code of the part / item you want to replace, by tapping the QR code icon and start scanning.
- In the list of search results, tap the relevant item and tap **Used**.
- Specify the used quantity.




You want to add other materials:

- In case you have a mobile store, open the **Add used materials** pop-up and tap the **Add new item** button at the bottom.
- In case you do not have a mobile store, go to the **Materials** screen and tap the **Add materials** button.
- Enter the relevant details in the **Description**, **Order quantity** and **Unit** fields.

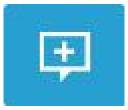
> If configured, the **Price excl. VAT / tax** field may also be available. It is intended for the cost registration of materials that do not come from the product catalog nor from stock, but that you had to purchase separately.

- Tap **OK**.

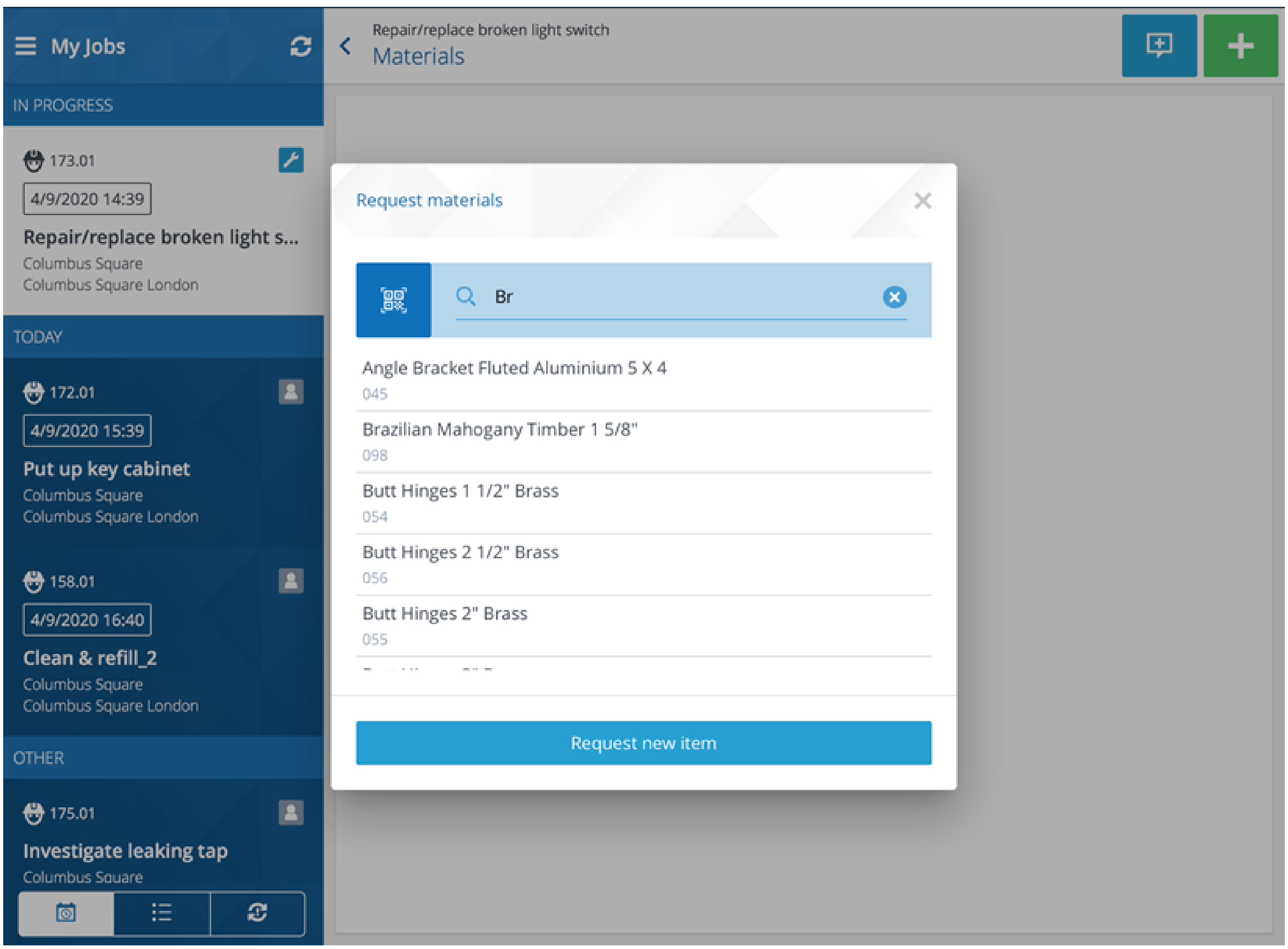
# Requesting materials

If you need additional materials for your job, but they are not available in your mobile store, you can request the materials:

- Tap the **Request materials** button at the top right corner:



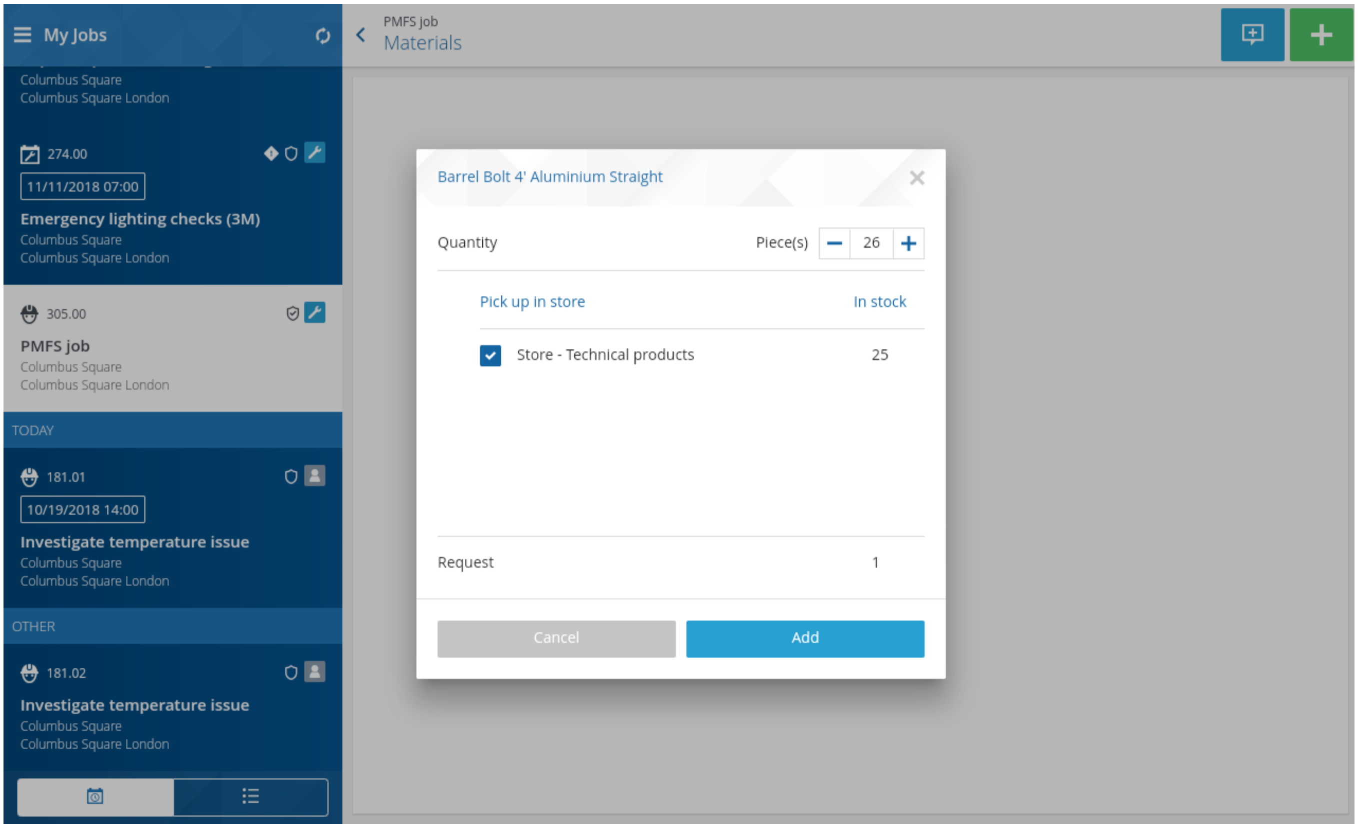
- In the search bar, start typing (part of) a search term in the search field to trigger a search action. Supported search terms are: product code / name, model type, brand, stock item code / name.
- If applicable, you can also use the QR code of the part / item you want to replace, by tapping the QR code icon and start scanning.




If the product is listed in the search results:

- Tap the relevant product and specify the quantity.

- If the requested product is on stock in one of the stores that can supply to the job's location, you can reserve it by selecting the relevant store(s):




- Tap **Add**.
- In the main screen, select a relevant job status for the current job (Temporary fix, Discontinue).
- Go to **Materials** > **Inbound materials** on the app to check if the product is ready to be picked up. You may need to tap the **Refresh** button to update the screen.
- If this is the case, pick up the requested materials at the selected store(s) and sign for receipt.
- Proceed with the job.

> In the **Materials** pop-up, the materials are now listed under **Used materials**. You can edit the quantities of materials to the actual use. These are sent to the back-office on ending the job.

If a product is not listed in the search results, you can request it, as a new item:

- Tap the **Request new item** button.
- Enter the relevant details in the **Description**, **Quantity**, **Unit** and **Comment** fields.

> If configured, the **Price excl. VAT / tax** field may also be available. It is intended for the cost registration of materials that do not come from the product catalog nor from stock, but that you had to purchase separately.

- Tap **Save**.

If you request materials on the job, you may not be able to complete the job. You can only stop working by selecting the **Temporary fix** or **Discontinue** action. The job is sent to the back-office.

# Required materials - status icons

| Icon | Description | What it means |
|---|---|---|
|  | Requested | You have requested materials and your request is being processed. |
|  | Reserved | The requested materials are available at the store and reserved for you. |
|  | Ready to pick up | The reserved materials are ready to be picked up by you from the selected store. |

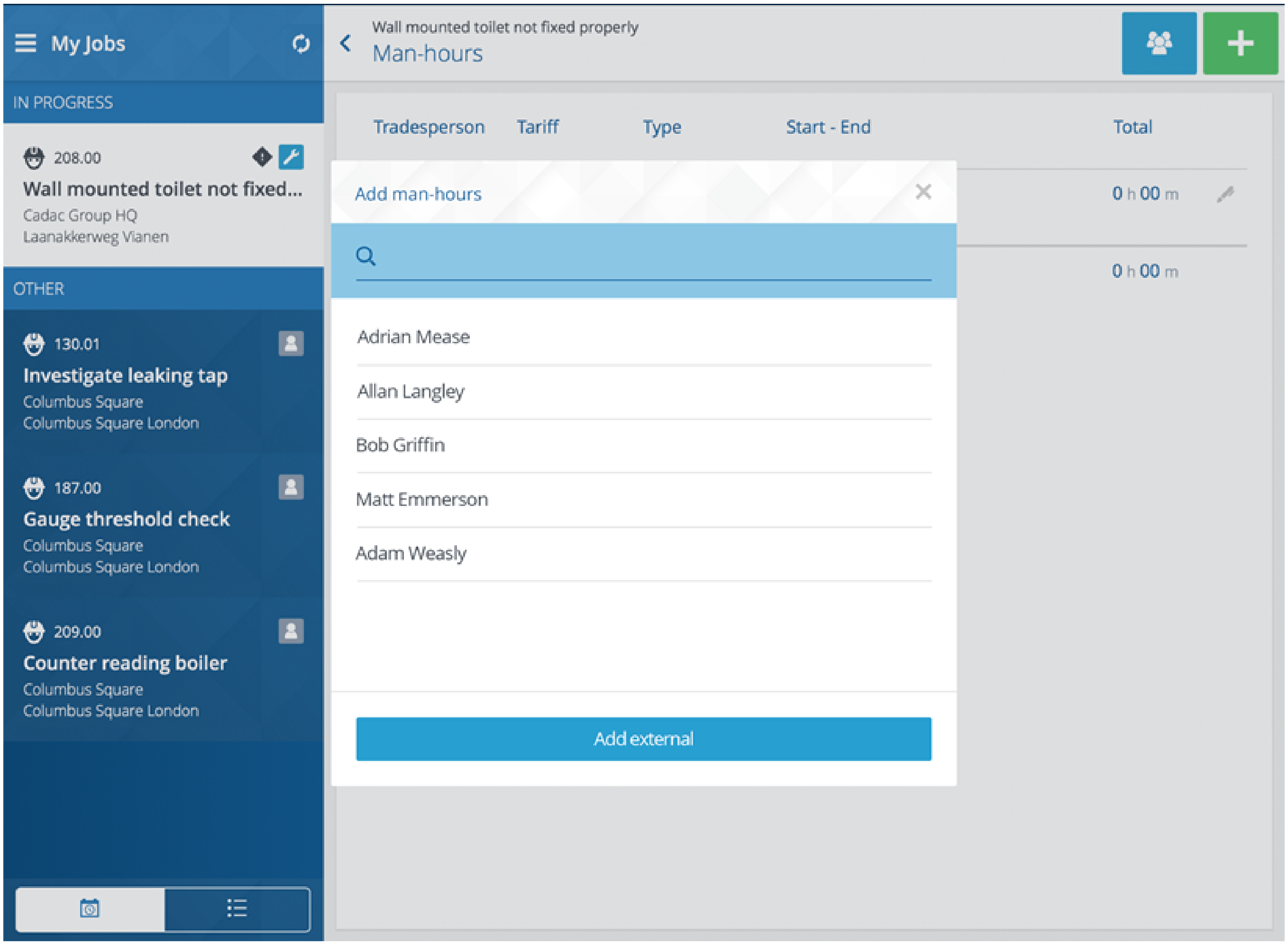
# Adding photos

- Tap the **Photos** block on the job summary.
- To take a photo, tap the big camera icon at the top right corner and take the picture: 
- To add a name and description to the photo, select it, tap the **Edit** icon, add the name and description and tap **OK**.
- To remove a photo, select it and tap the **Delete** icon.
- Tap the navigation arrow to return to the main screen.

# Manually adding labor hours

Your labor hour registration starts automatically if you tap the **Work** button. If required, you can add extra labor hours for yourself. You can also manually register additional labor hours for one or more colleagues or external staff.

- Tap the **Labor hours** block on the job summary.
- View the existing labor hour records for **Travel**, **Work** or **Wait**.
- Tap **Add** (plus sign) to add additional labor hours for yourself or a colleague. Use the search bar in the **Add labor hours** pop-up, to find their names.



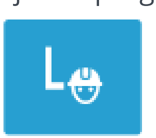

- If labor hours for external staff must be added, tap **Add external** and enter the relevant data.
- Tap **Close** to return to the main screen.

> Your AppSuite - Order settings may not allow overlapping labor hours. If overlaps are found for a person, you will be warned, so you can correct the registration.

# Adding a sub to a job in progress

When working on a job, you may find a related issue for which you want to create separate task. In that case you can add a sub. This new job can be picked up directly by you, or you can send it to the back-office for replanning.

## Procedure

1. With the current job in progress, open the **General info card** and tap the **Add sub** button at the top right of your screen:  .

A dialog opens, showing a list of optional orders that you can add as sub to this job.

2. Select a relevant order.
3. Enter the order data and add materials and photo(s) as required.
4. If you want to pick up the new job yourself, select the **Assign to me** check box.
5. Tap **Save**.

   The order you created is sent to the back-office. If you have not assigned it to yourself, the back-office can assign it to someone else. You remain the internal requestor. If you did assign the order to yourself, you are both 'assignee' and 'internal requestor'. The order gets the **Assigned** status.

If you are working offline at the moment you add the new order, it is stored on your device until you are online again. The order is subsequently sent to the back-office.

# Adding a new activity during work

When working on a job that is in progress, you may want to add an additional activity that is not yet listed on the app. It is strongly recommended that you add any additional activities, as the system will determine whether to display applicable health and safety information.

## Procedure

1. With the current job in progress, open the **Health & safety** card
2. In the **Activities** section, tap the **Add** button (the green plus sign).

   The **Add activity** dialog opens.

3. Enter the activity data.
4. Tap **Add**.

   Depending on the added activity, a risk assessment and questionnaire may be displayed.

# Adding a new hazard during work

When working on a job that is in progress, you may encounter a hazard that is new to you. Since you cannot be sure which risk assessments, method statements and questionnaires apply, you should register this new hazard.

## Procedure

1. With the current job in progress, open the **Health & safety** card
2. In the **Hazards** section, tap the **Add** button (the green plus sign).

   The **Add hazard** dialog opens.

3. Enter the hazard data and - if required - add a photo.
4. Tap **Add**.

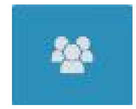
   Depending on the added hazard, a risk assessment and questionnaire may be required.

5. Tap **Acknowledge** to proceed with the job or tap **Reject** to stop and return the job to the back-office.

The new hazard will be added to **Hazard registry** in the back-office, with the field **Assessment required** set to **Yes**. The health & safety officer can assess the new hazard and determine its risk level or, if applicable, perform a full asbestos assessment.

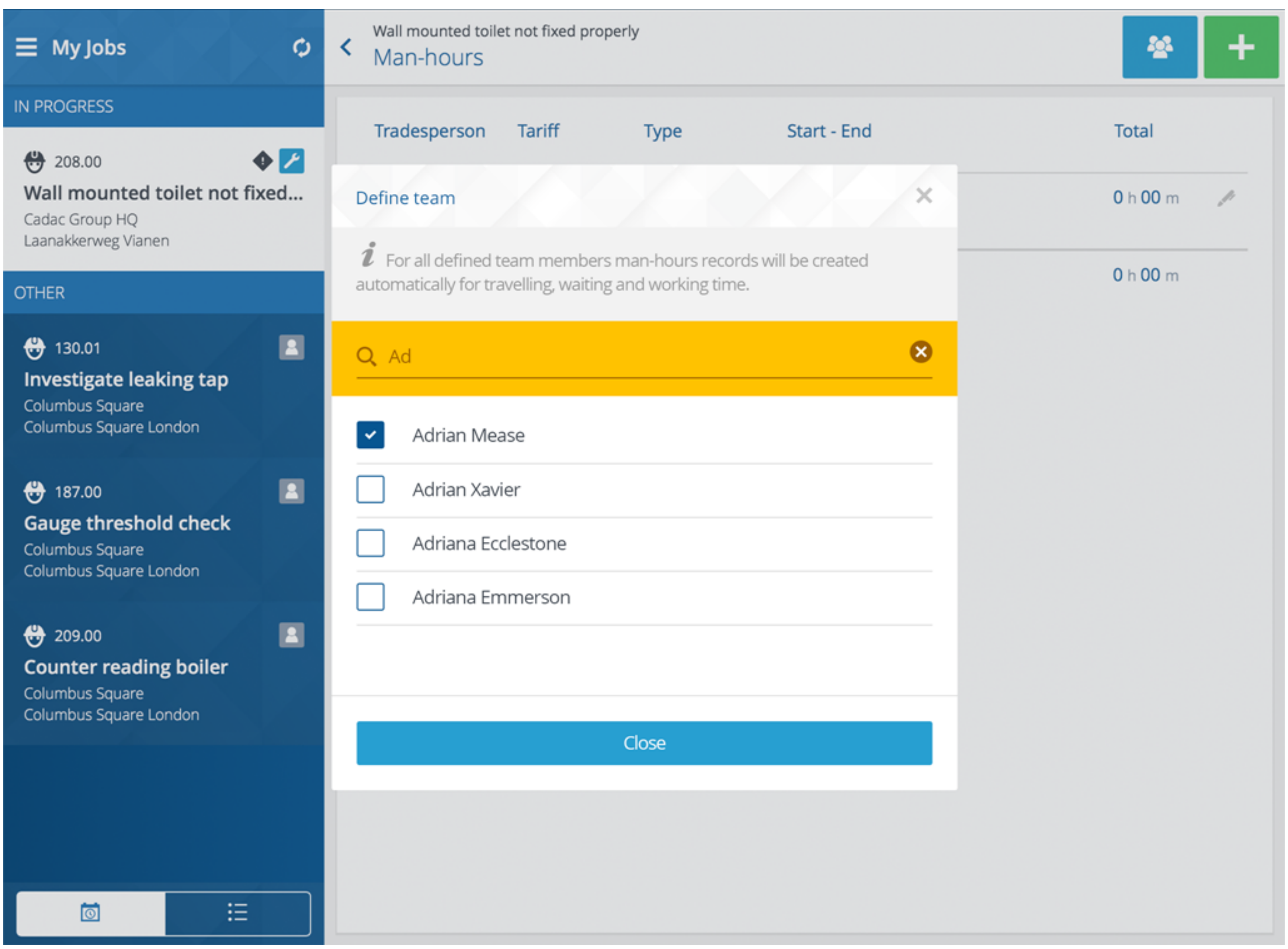
# Defining teams

You can instantly start a team, if it turns out that you require the assistance of one or more people on a job.

- 

In the **Labor hours** pop-up, tap the **Define team** button, to start your instant team:

- Use the search bar to find names of potential team members, select the relevant team member(s) and tap **Close**.
- Enter the required data for the team member(s), such as start date-time, end date-time and labor hour type.
- The labor hour registration is automatically started for any members added to the team.



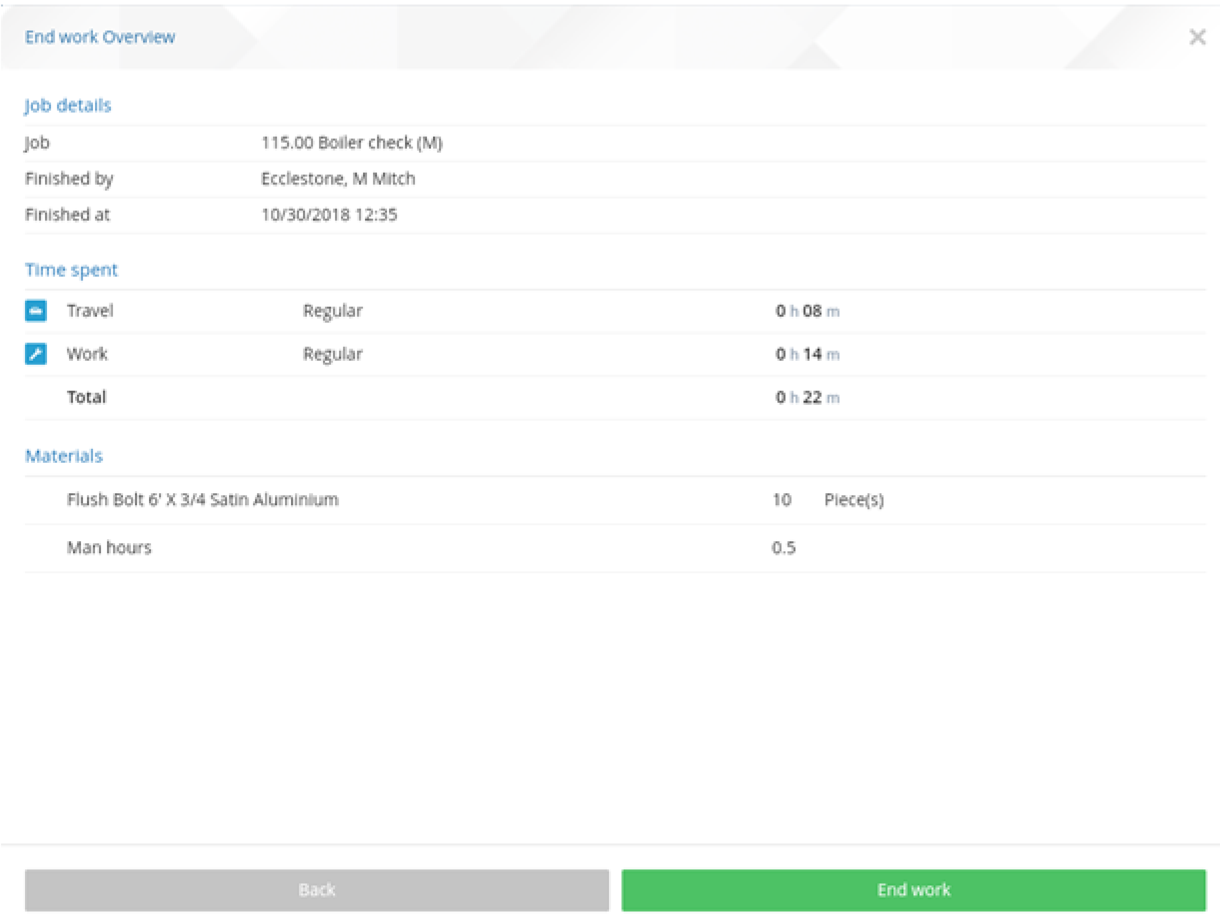
# Ending a job and signing off

If you have completed your job and entered the relevant details and comments, proceed as follows:

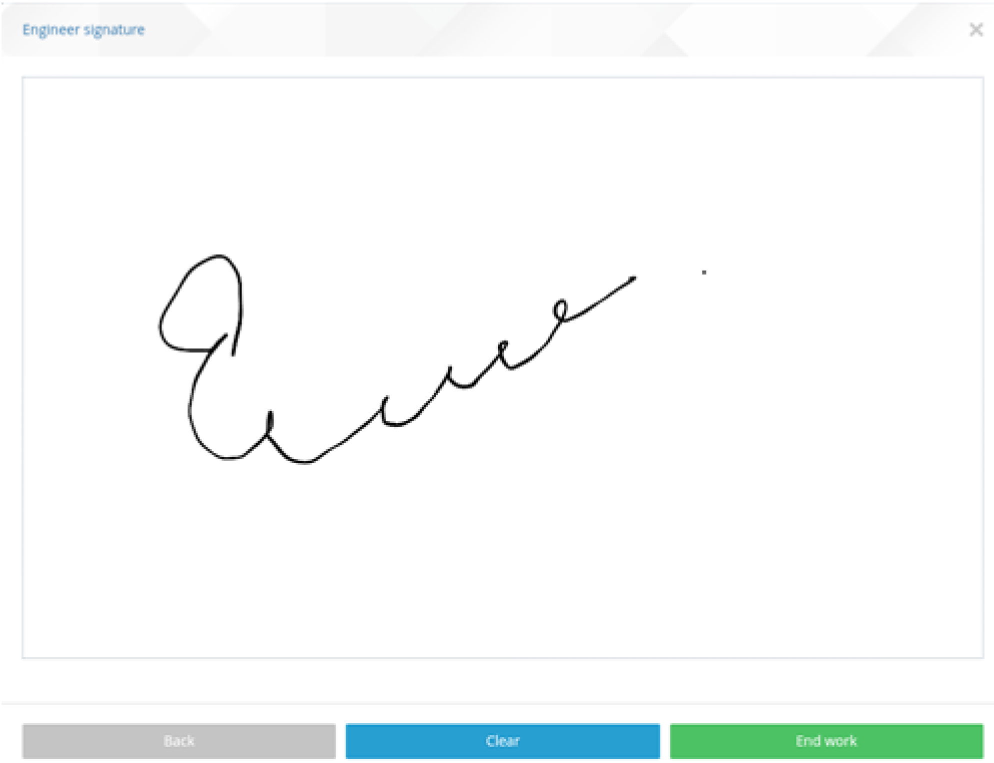
## Procedure

1. EITHER tap: **Temporary fix**, if you want to technically complete the job at a later stage;
2. OR tap: **End work**, to actually finish this job.

   The **End work** overview is displayed:

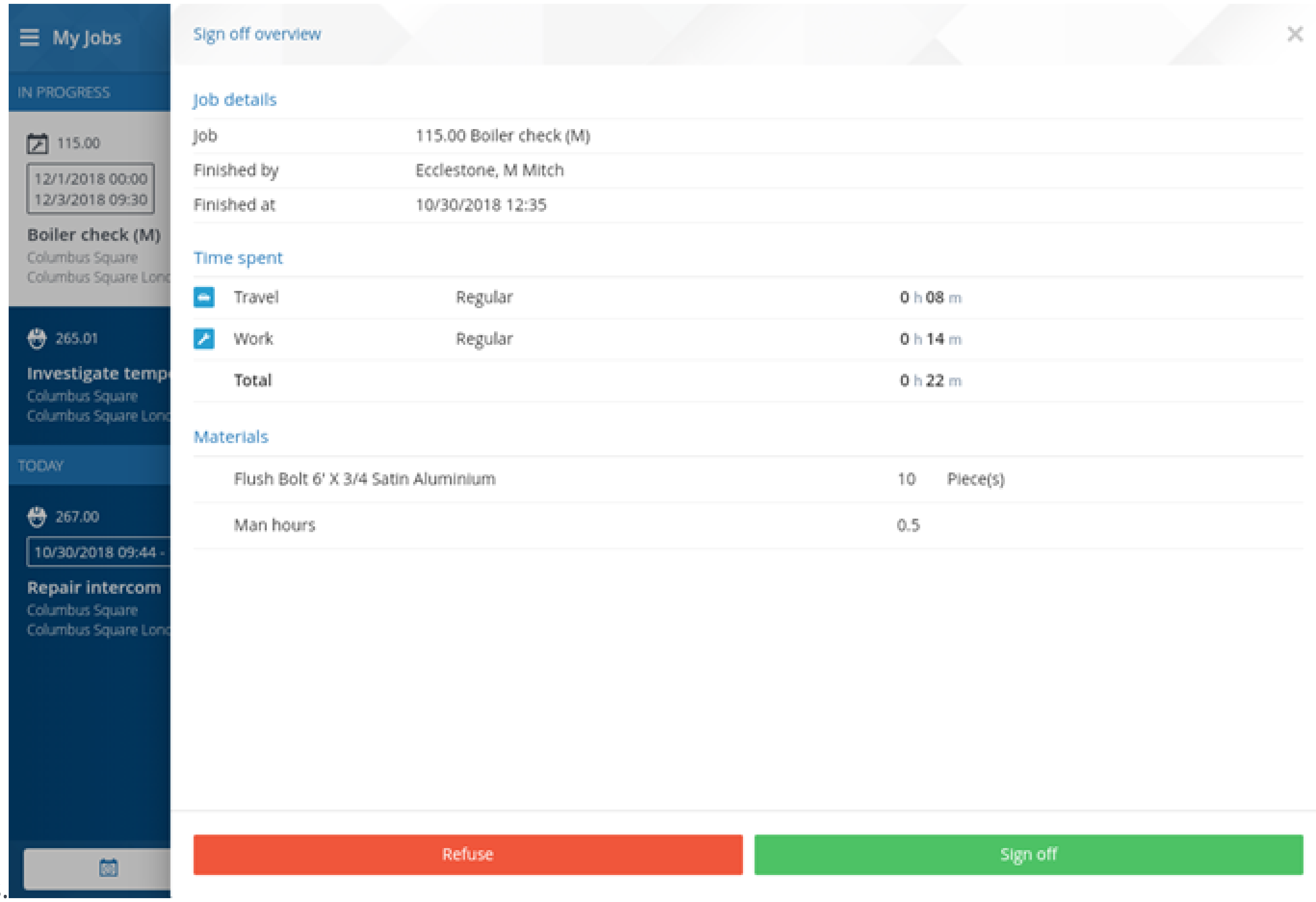



Materials are displayed as two distinctive categories: **Used** materials and **Required** materials. Required materials include **Ready to pick up**, **Reserved** and **Requested** materials.

3. If your app's settings require your signature, sign off and tap **End work** in the **Engineer's signature** pop-


up:
4. In the **Sign-off overview** screen, let the second signatory (usually the customer) tap **Sign off** and sign for the job's completion.

   It depends on your app's configuration which type of **Sign-off overview** screen is displayed: a *summary* (see below image) or a *comprehensive* screen. A summary (below image) lists basic job information, your comments, labor hours, materials and, if configured, fault handling observations and incomplete work. A comprehensive screen also lists asset information, questionnaires and all maintenance




activities.

Materials are displayed as two distinctive categories: **Used** materials and **Required** materials. Required materials include **Ready to pick up**, **Reserved** and **Requested** materials.

If the **Refuse** action is enabled on your app, customers or other signatories can refuse to sign off, when they are not satisfied with the work. They must give a reason for their refusal. The job is subsequently sent to the back-office and moved to the **Technically completed** status. The refusal, the signatory's reason for refusal and any comments are registered in a communication log and sent to the back-office, where appropriate follow-up actions can be taken.

# Materials

The **Materials** navigation panel gives access to various stages in the flow of materials: from an overview of the available materials in **My mobile store**, to **Inbound materials** and **Outbound materials**. It also gives access to the **Catalog**, where you can search for materials and see how many items are currently available in stock.

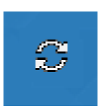
• To be able to use **My mobile store**, **Inbound materials** and **Outbound materials** you require a *PMFS PRO license* and your user group must be linked to the PMFS PRO product definition.
• Although the **Materials** module is optimized for tablets, you can also use it on smartphones (portrait mode). In that case, some columns may initially be hidden from view. However, this will not affect the search options for these columns. On smart phones, action buttons such as **Add materials** and **Request materials** are positioned differently. • Screen layouts in the user information may deviate slightly from your actual screen, due to updates and improvements to the app.

For more information on configuring **My mobile store**, refer to the *Planon AppSuite - Field Services - Configuration Guide*.

## Inbound materials

The **Inbound materials** screen gives overview of materials that are required for jobs assigned to you. The data is sorted on store first and on product description second. If you have a mobile store, materials can be transferred to your mobile store via stock transfers.

If you want to see the latest status of requested materials of a job that is in progress, tap the refresh button:

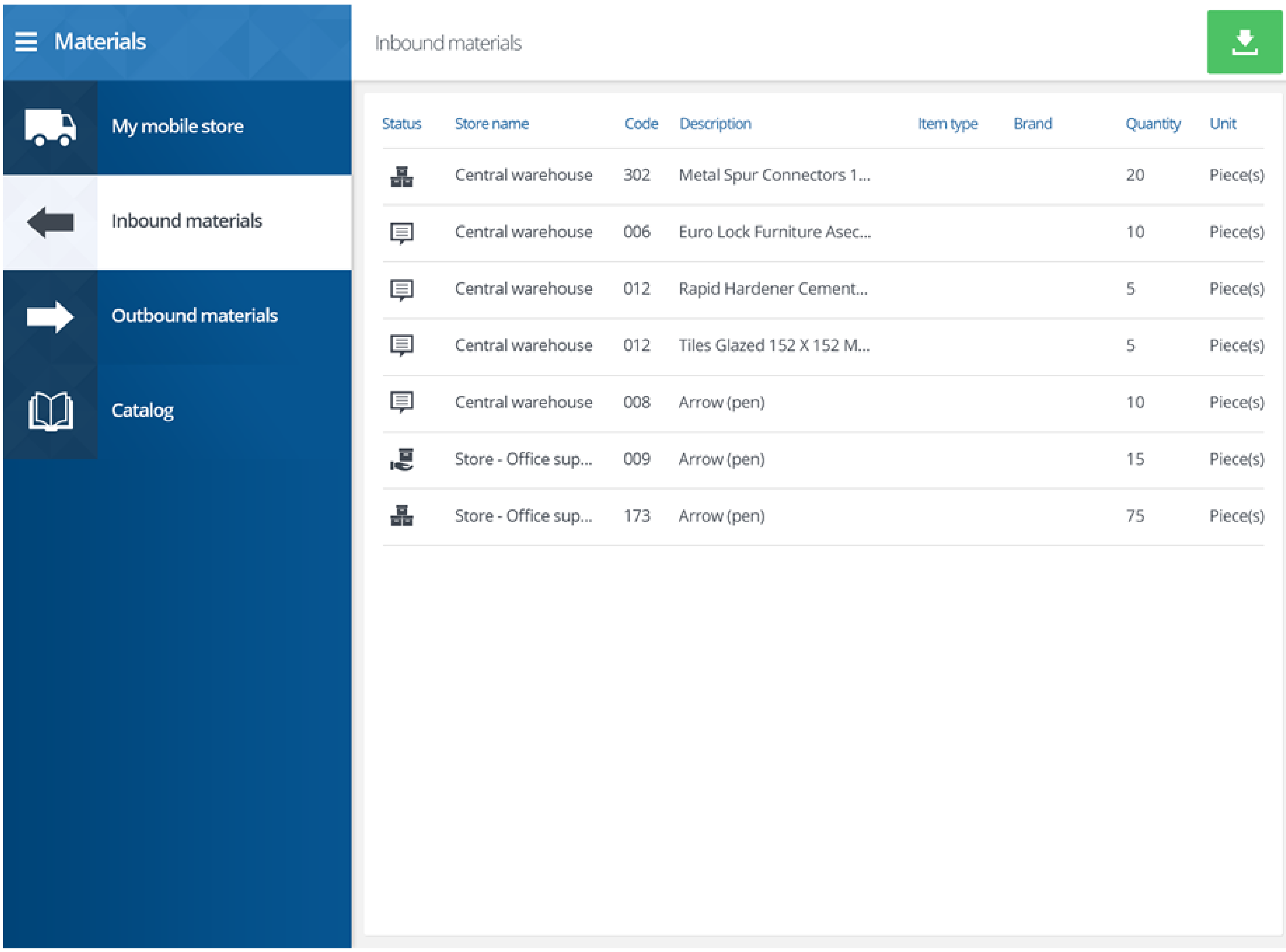


You can follow the progress of inbound materials by their icons:

| Icon | Description | What it means |
|---|---|---|
|  | Requested | You have requested materials and your request is being processed. |
|  | Reserved | The requested materials are available at the store and reserved for you. |
|  | Ready to pick up | The reserved materials are ready to be picked up *by you* from the selected store. |

| Icon | Description | What it means |
|---|---|---|
|  | Shipped | The requested materials are shipped *to your mobile store* from the listed store. |

See Confirming the receipt of materials to find out more on how to confirm the receipt of the materials.



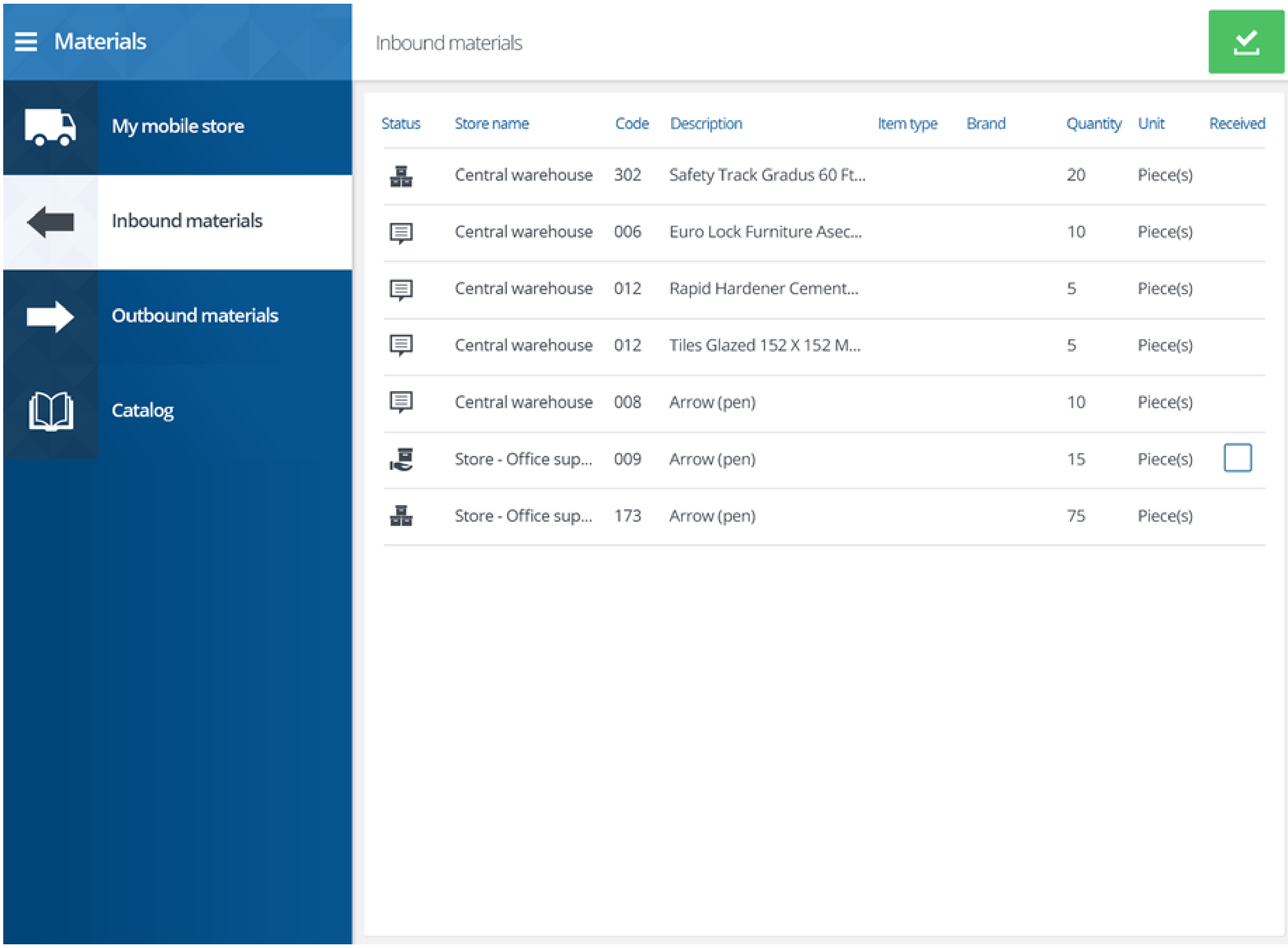

# Confirming the receipt of materials

To avoid incorrect processing of materials, you must personally confirm the receipt of any materials that are in one of the following statuses: **Ready to pick up** or **Shipped**.

## Procedure

1. Tap the green button at the top of your screen:

2. In the **Received** column, check-mark any received items.

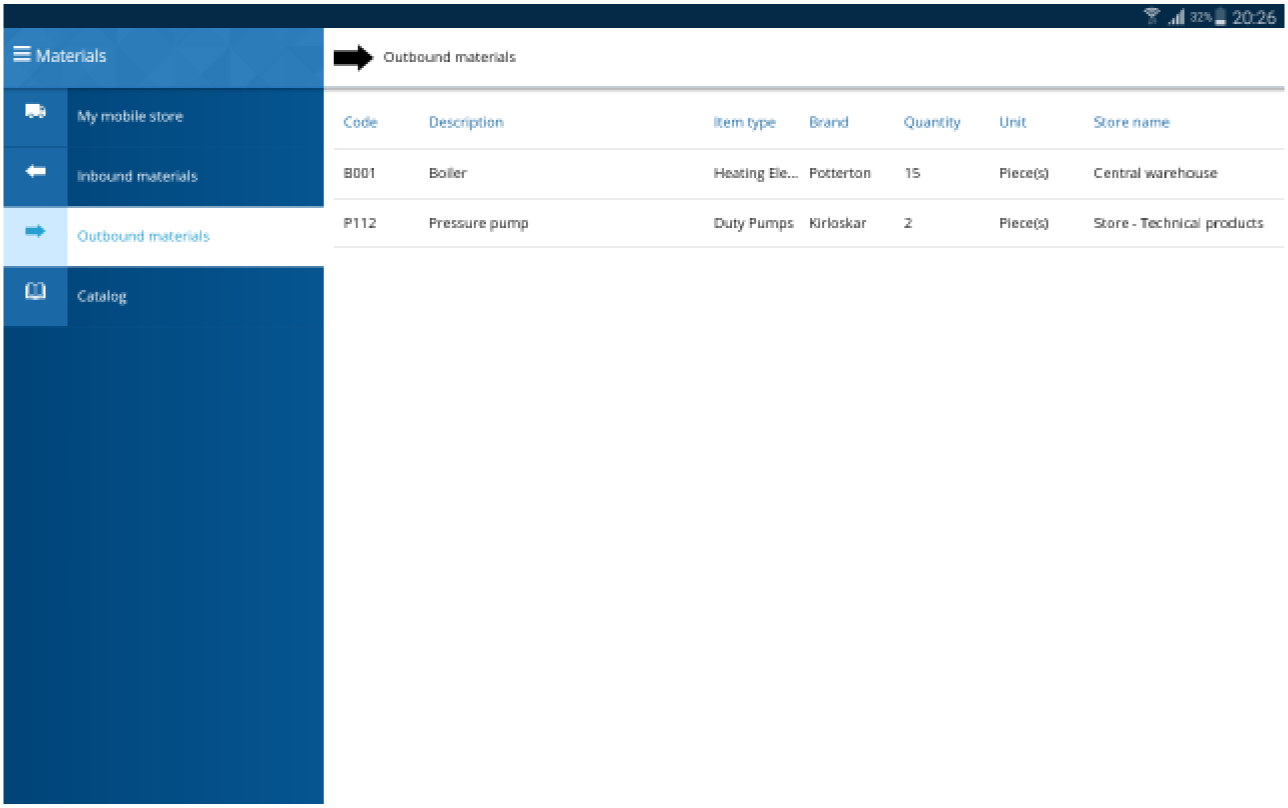



3. To confirm the receipt of check-marked materials, tap the green button again.

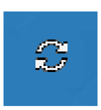
After this confirmation, the received materials are officially issued.

# Outbound materials

The **Outbound materials** screen gives an overview of the materials to be returned and the location to which they must be returned. The data is sorted on store first and on product description second.

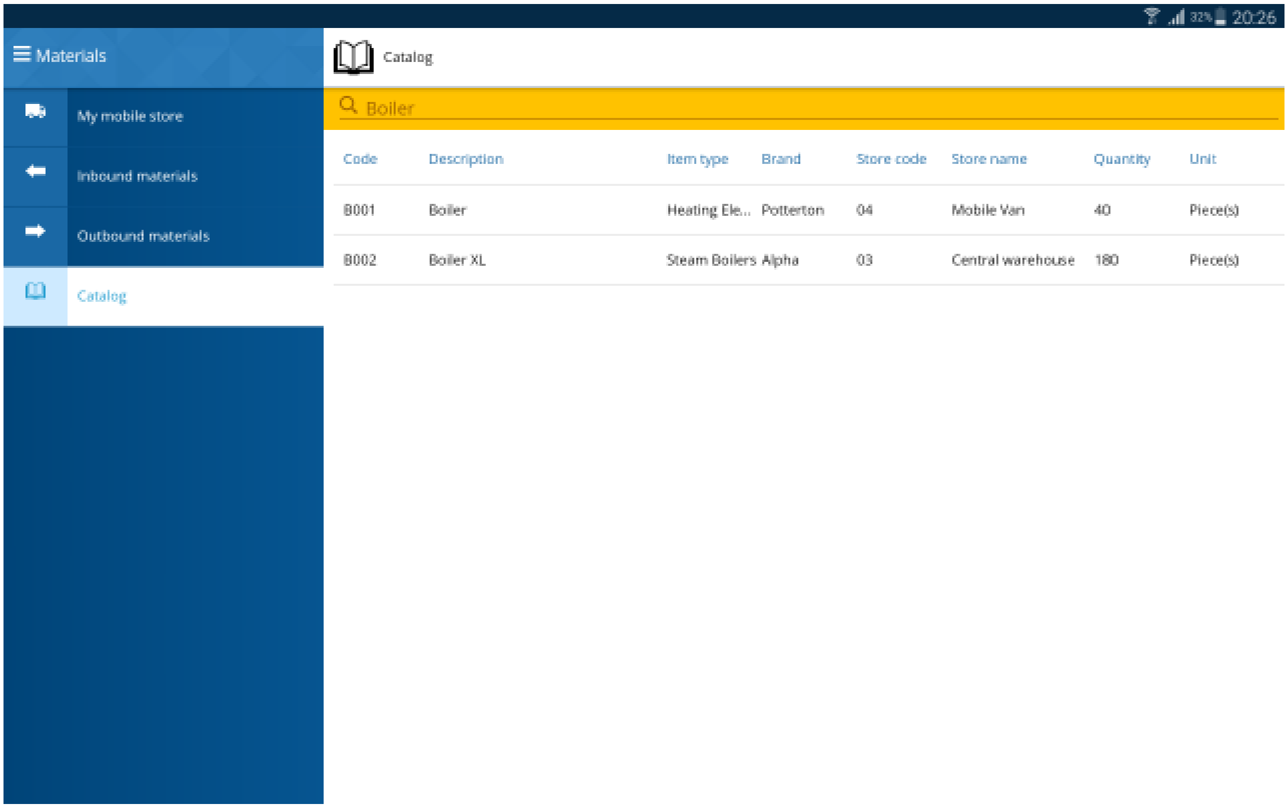



You can manually update the list of outbound materials for a job that is in progress, by tapping the refresh button:



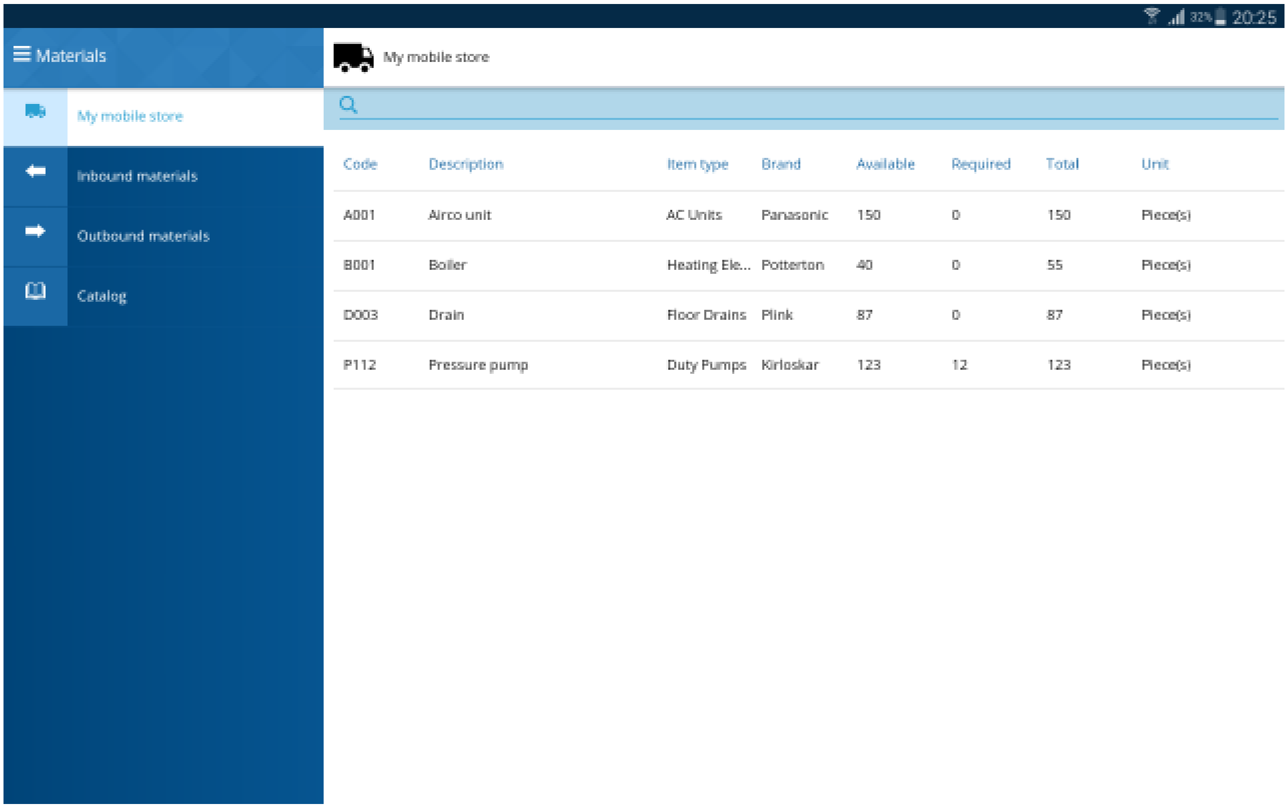
# Catalog

**Catalog** provides read-only access to the product catalog, where you can search for available materials in all stores. In the search bar you can search for a product by typing (part of the) product code / name, model type, brand, stock item code / name.




# My mobile store

If you have a mobile store, the materials from this mobile store can be used for jobs assigned to you. The **My mobile store** screen gives an overview of the materials that are available in your mobile store and their quantity. In the search bar you can search for a product by typing (part of the) the product code / name, model type, brand, stock item code / name.


20:25
Materials
My mobile store
Inbound materials
Outbound materials
Catalog
My mobile store
Code
Description
Item type
Brand
Available
Required
Total
Unit
A001
Airco unit
AC Units
Panasonic
150
0
150
Piece(s)
B001
Boiler
Heating Ele...
Potterton
40
0
55
Piece(s)
D003
Drain
Floor Drains
Plink
87
0
87
Piece(s)
P112
Pressure pump
Duty Pumps
Kirloskar
123
12
123
Piece(s)

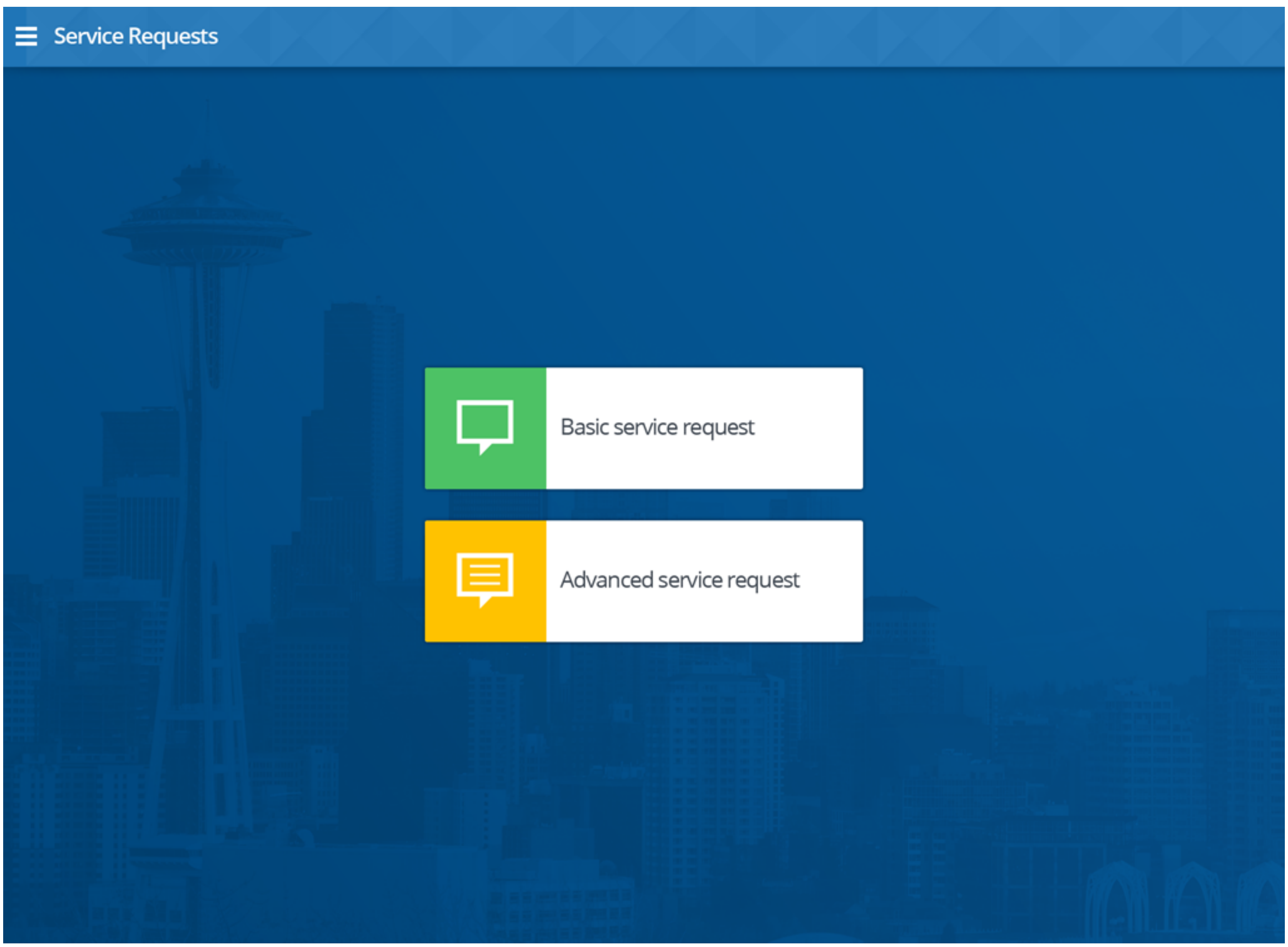
# Service request

When you are working on an assigned job, you may find a new issue you want to report to the back-office. This issue does not have to be related to your current job list. In that case, you can add a new service request via the **Planon AppSuite - Service requests** module.

If you have internet connection, you can choose to either add a **basic service request** or an **advanced service request**. If you do not have internet connection on the current job and your AppSuite configuration supports working offline, you will be able to submit **basic service requests** only. The basic service requests are saved on your device until you are online again and are subsequently sent to the back-office.

## Service request screen layout

If you select the **Service Requests** module on the app suite's side bar, the opening screen is displayed. It includes a **Basic service request** button for submitting basic service requests - even if you are offline - and an **Advanced service request** button for submitting a detailed service request online.



If your organization does not work with offline service requests, the **Basic service request** button is not displayed.

# Adding a basic service request

You want to submit a simple service request to the back-office, because you came across an issue that needs to be reported. It does not matter whether you are working online or offline.

## Procedure

1. Select the **Service Requests** module on the app's side bar.
2. Tap the **Basic service request** button.
3. In the **Select order** pop-up, tap the pre-defined service request that matches your reportable issue.

   Use the filter bar to search the list of service requests by description.
4. On the **Add service request** form, enter the required data.
5. If relevant, add additional information in the **Comment** field.
6. If applicable, take and upload a photo.
7. Click **Submit**.

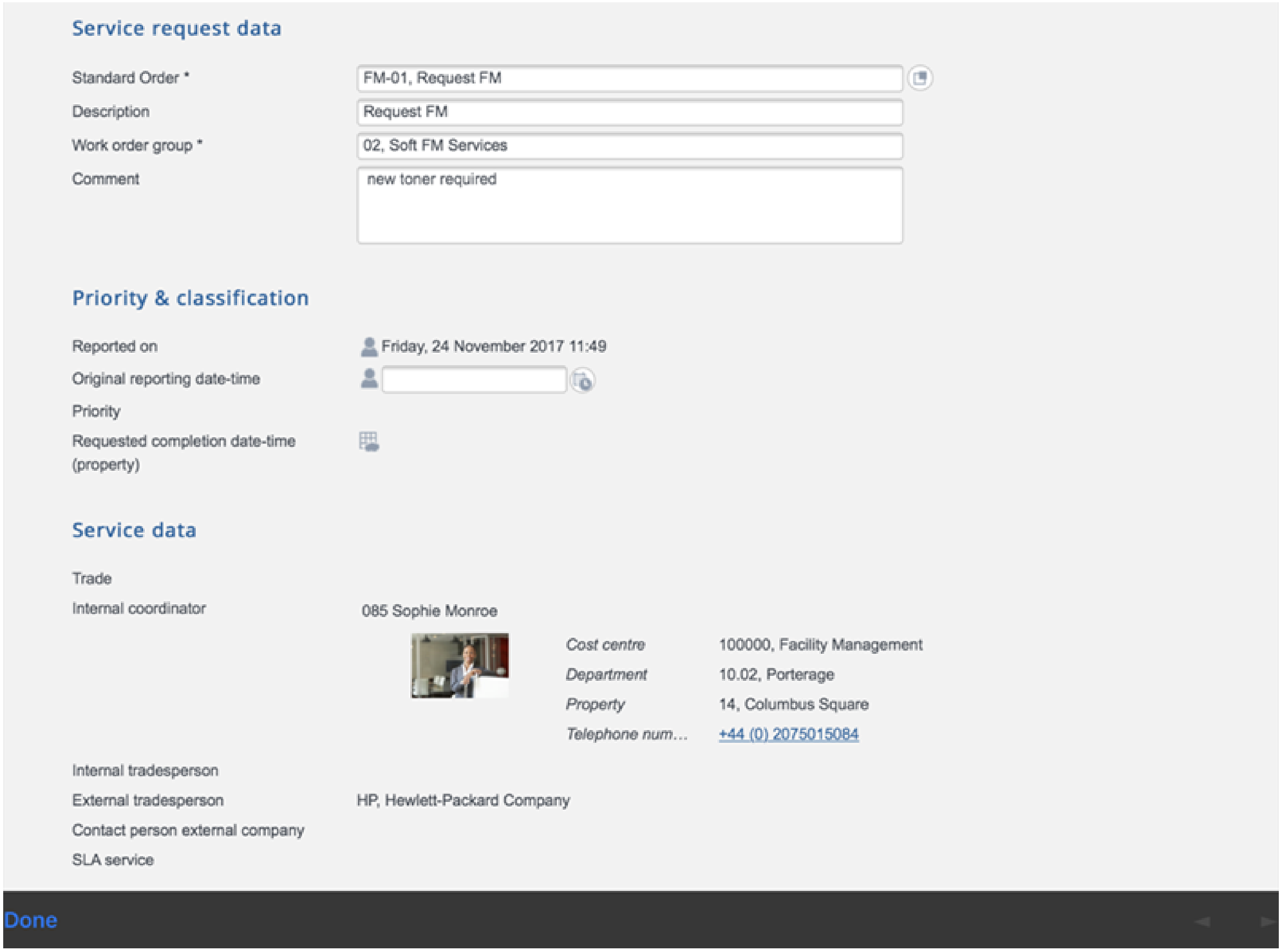
   Your service request is sent to the back-office when you have internet connection.

# Adding an advanced service request

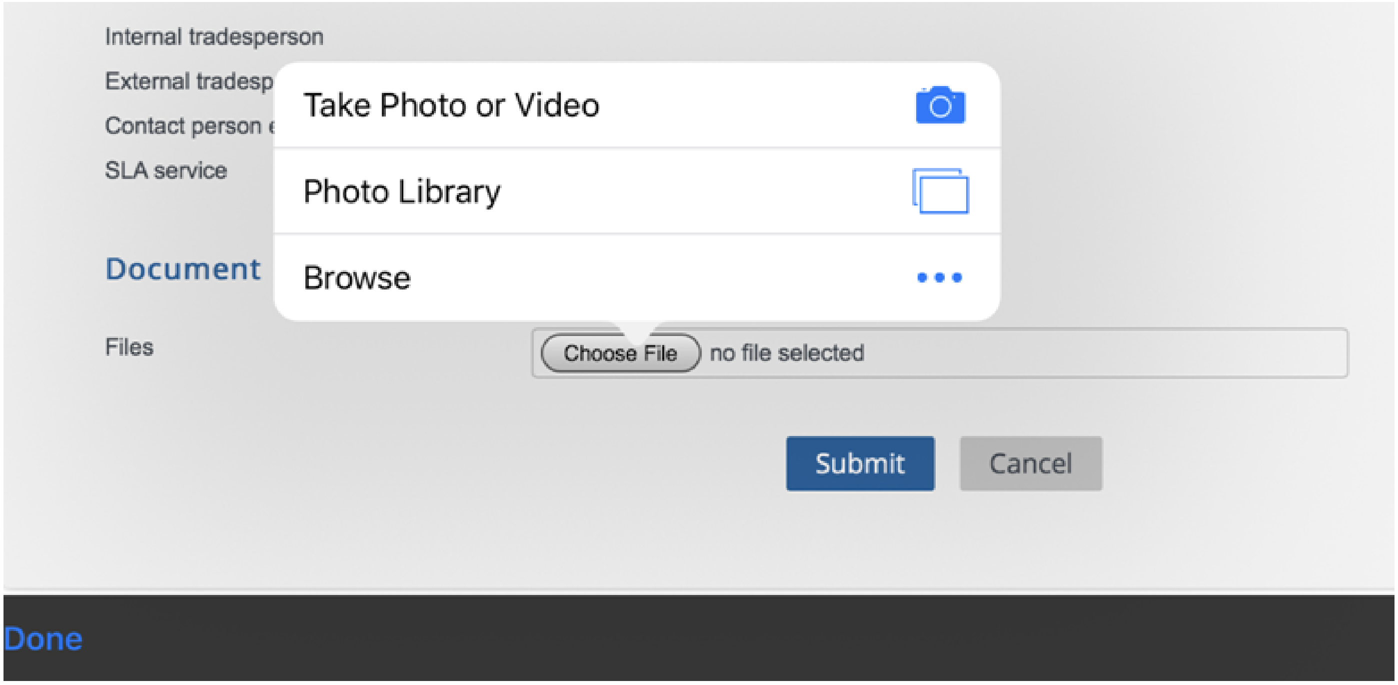
You want to submit a new service request to the back-office, because you came across a reportable issue. You also have internet connection.

## Procedure

1. Select the **Service Requests** module on the app.
2. Tap the **Advanced service request** button.
3. A detailed form opens, where you can enter all relevant details:




4. At the end of the form, you can take and upload a photo or video, select an image from the photo library, or browse for relevant information that can enhance the information in the request.




5. Click **Submit**.

   Your detailed service request is sent to the back-office.

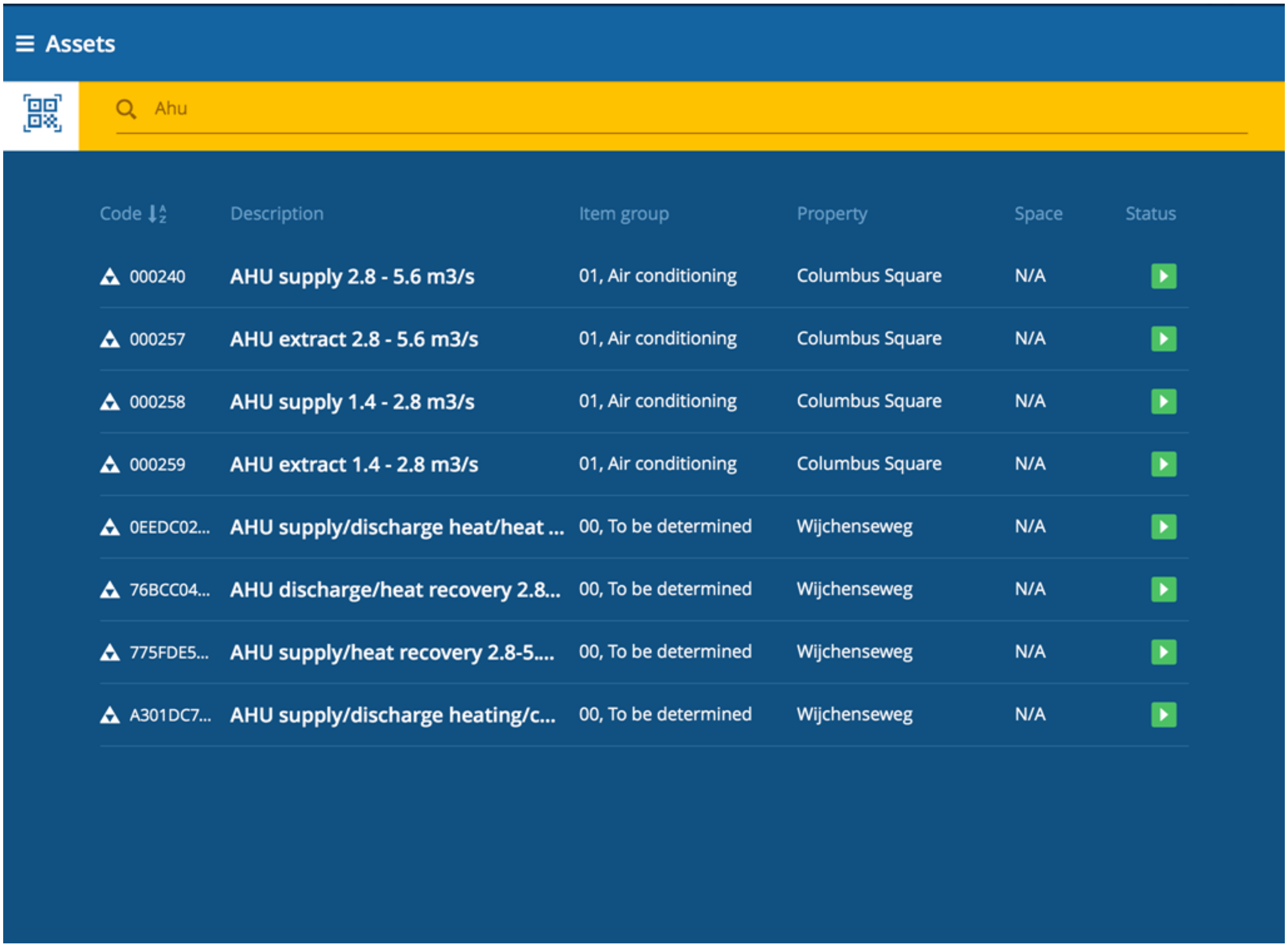
# Assets

**Planon AppSuite - Assets** provides easy access to any asset information you may need while working on a maintenance job. If there is an issue with an asset on site, you can retrieve the latest asset information and properly assess the problem.

## Assets screen layout

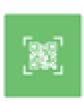
If you select the **Assets** module on the AppSuite's side bar, a search page is displayed. You can start searching for assets by scanning their QR code or by entering (part of their) **Code**, **Description**, **Brand**, **Asset tag** or **Property** in the search bar.

- Currently, the AppSuite only supports single assets, not multiple.
- If the extended search for assets is activated in AppSuite, you can not only search within the property registered on the job (default), but you also have the option to search within the entire building complex.




The search results are displayed in a list with a maximum of 100 assets. Only assets with statuses **In use** or **Idle** in Planon are displayed on the app. If there are subassets, these are displayed in a hierarchical list. You can sort a column in reverse order by tapping the A/Z button.

> You can also retrieve information on an asset that you are about to work on by scanning its QR or bar code. You can activate the code scanner by tapping this icon in the search bar:

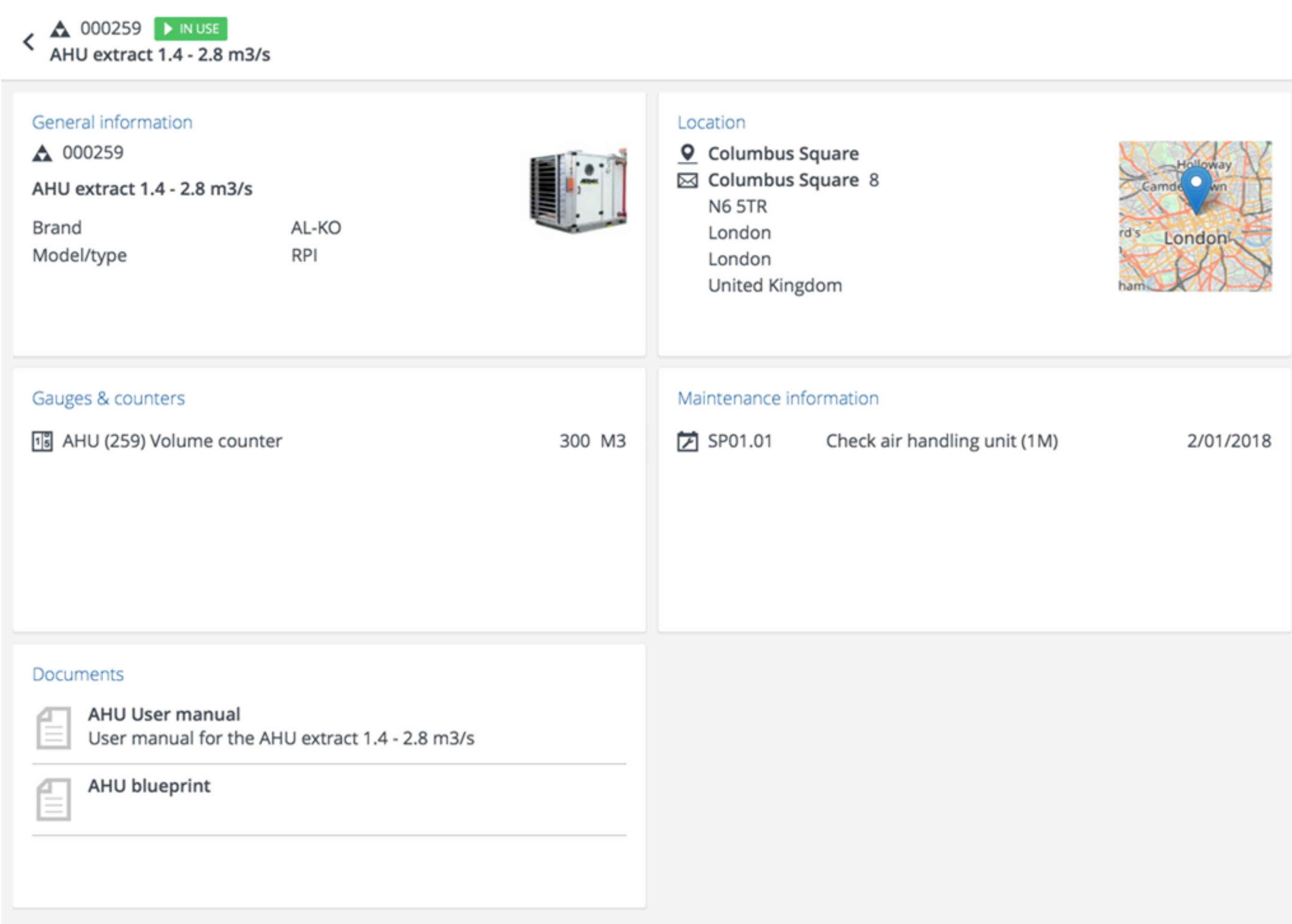


If you select an asset, the right pane will display a summary of information blocks on the asset.

# Asset information blocks

The following information blocks are displayed for a selected asset:

- **General information** - Displays essential information on the asset, for example: **Description**, **Brand**, **Model**, **Important notice**, **Record** etc.
- **Location** - Displays location information on the asset, such as the address and a map.
- **Counters and gauges** - Gives read-only access to the last 10 counter / gauge readings of the selected asset.
- **Maintenance information** - Gives access to the asset's maintenance jobs from the past year to the present date, including photos and documents from communication logs (supported file formats: .PDF, JPEG, .JPG, .PNG). The maintenance job records include both *reactive work orders* and *planned maintenance activities*. Should there be a reference to a linked standard order, this is also displayed. The maintenance details will be displayed on selecting a specific job.
- **Asset documents** - Gives access to relevant asset documents, such as maintenance manuals. The supported file formats are .PDF, JPEG, .JPG, .PNG. You can open the listed files in their default application or access an external link to documentation by tapping the relevant URL.
- **Hazards** - If your organization has purchased the *Health & Safety Manager* license, this block gives access to any hazards that were registered for the selected asset, or for the space or property where it is located.
- **[Additional asset information]** - Optional asset block, configured by your application manager, with asset data that is relevant to your situation.



# Adding a service request for an asset

After you have found an asset via text search or scanning a QR code, you may also want to create a *service request* for it. For example because additional maintenance is required or because the asset needs further inspection.

Procedure

1. In the **Assets** module, tap the relevant asset in the search results to open the asset's information blocks.
2. At the top right, click the **Add service request** button.

3. Select a relevant request from the list.
4. Enter the details in the form and add a comment or photo, as required.
5. Tap **Create**.

# Configuring and using external scanners

It is possible to connect to an external RFID scanner in the **AppSuite** > **User settings**. RFID scanners can be used to scan and decipher RFID tags, bar codes and QR codes.

> If you use your own *asset tags* instead of the Planon asset codes, these tags must be registered with the relevant assets in Planon Essentials in Assets . The **Asset tag** field of these assets must contain the corresponding tag code.

## Procedure

1. Go to **Settings** on your tablet or phone and make sure Bluetooth is activated.
2. Scan for available devices and pair your mobile device with the correct RFID scanning device.
3. Go to the **AppSuite**, tap the hamburger menu icon .

   A menu is displayed.
4. Tap the user name. The **Settings** page is displayed.
5. Tap the **Devices** option.

   In the next page, one or more paired RFID scanning devices are listed.
6. Tap the scanner you want to connect to.
7. Tap the back option on the menu.

Your mobile device is connected to the RFID scanner. You can see the device and the connection status in the **Devices** option. You can now use the scanner to find assets by their tags.

8. Close the **User settings** page.
9. Go to the **Assets** module.
10. "Fire" your RFID scanner.

    One or more assets with RFID tags are found and listed in the AppSuite app. You can read an asset's proximity from the indicator (color and a percentage) in the **Strength** column.


The RFID scanner icon with two blue circle outlines indicates that the scanner is connected. Otherwise, a single blue outline is displayed.

11. Tap the relevant asset to view its details.

If you use the scanner to read a barcode or QR-code and a match is found, you are directed to information on that specific asset. If the barcode is not recognized as a Planon barcode / QR code, it is read as plain text and the database is searched for a matching asset tag and/or asset code. This may lead to a list with multiple results, from which you can select the correct asset.

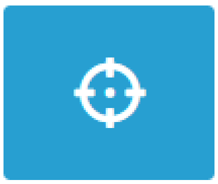
# Using the RFID scanner to find an asset by tag

If you are looking for a specific asset that is out of your visual range, but that is expected to be close by, you can use the RFID scanner to find it by its tag.

This search can only be performed if an RFID scanner is connected and if the asset's tag is entered in Essentials > Assets .

## Procedure

1. In Planon AppSuite, go to the **Assets** module.
2. Use the filter to find the asset you want to locate.
3. Tap this asset, to go to its details.
4. Tap the **Search for tag** icon.



5. Aim the scanner at the asset's presumed location.

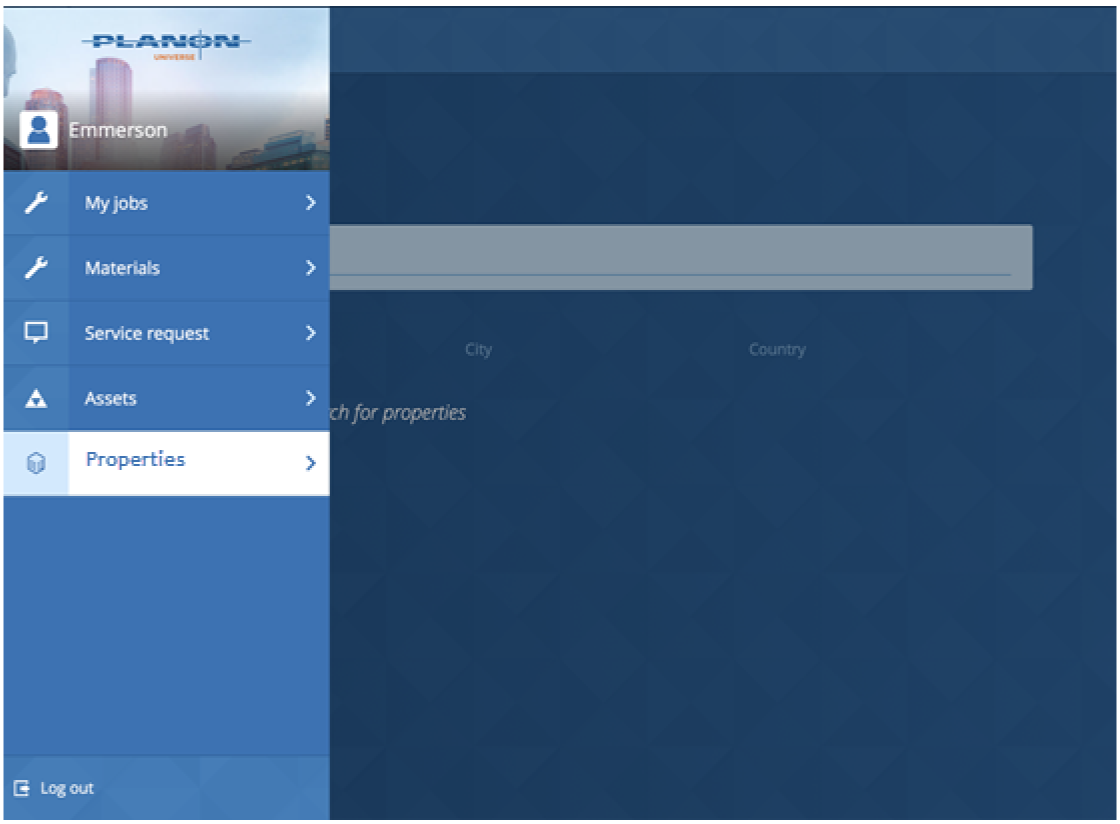
   The scanner will continuously scan the space for the asset's tag. When the scanner detects the tag, its proximity is indicated with a signal strength percentage. The higher the percentage, the nearer the asset is.
6. Close the search after you have detected the asset.

# Properties

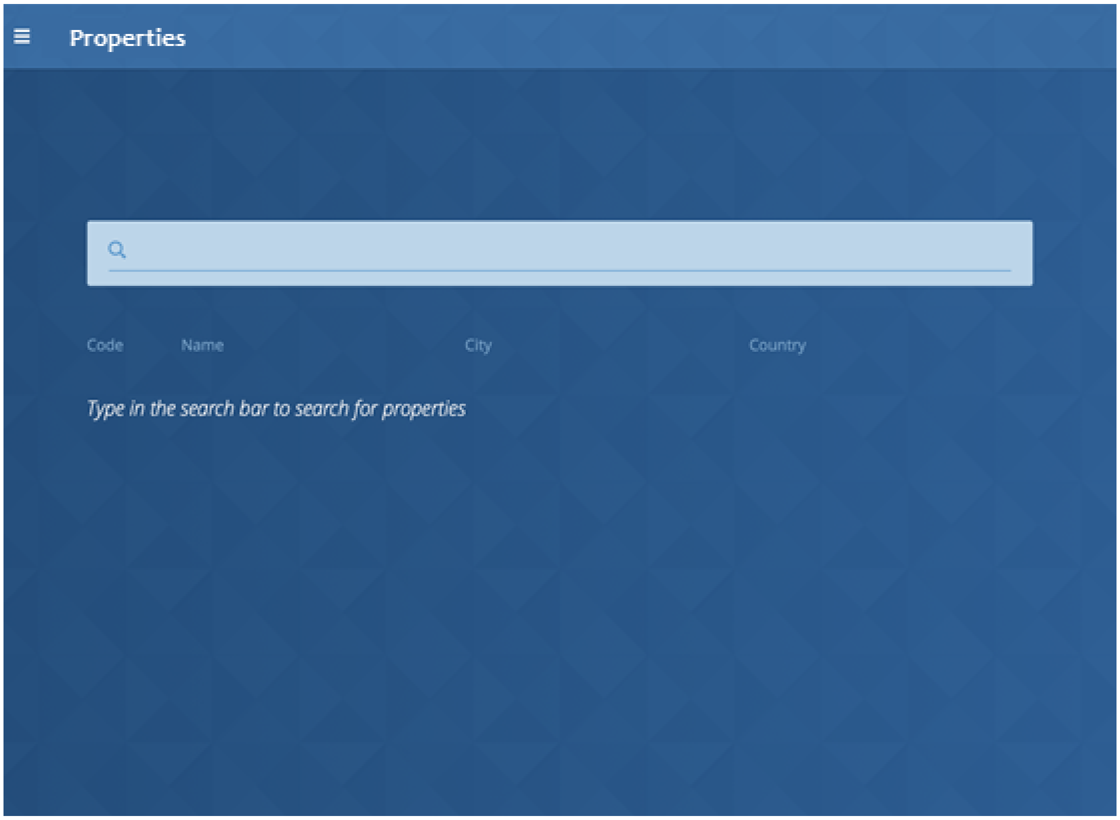
**Planon AppSuite - Properties** provides easy access to any property information you may need while working on a maintenance job. The search functionality enables you to find the correct building information via one or more search criteria.

## Properties screen layout

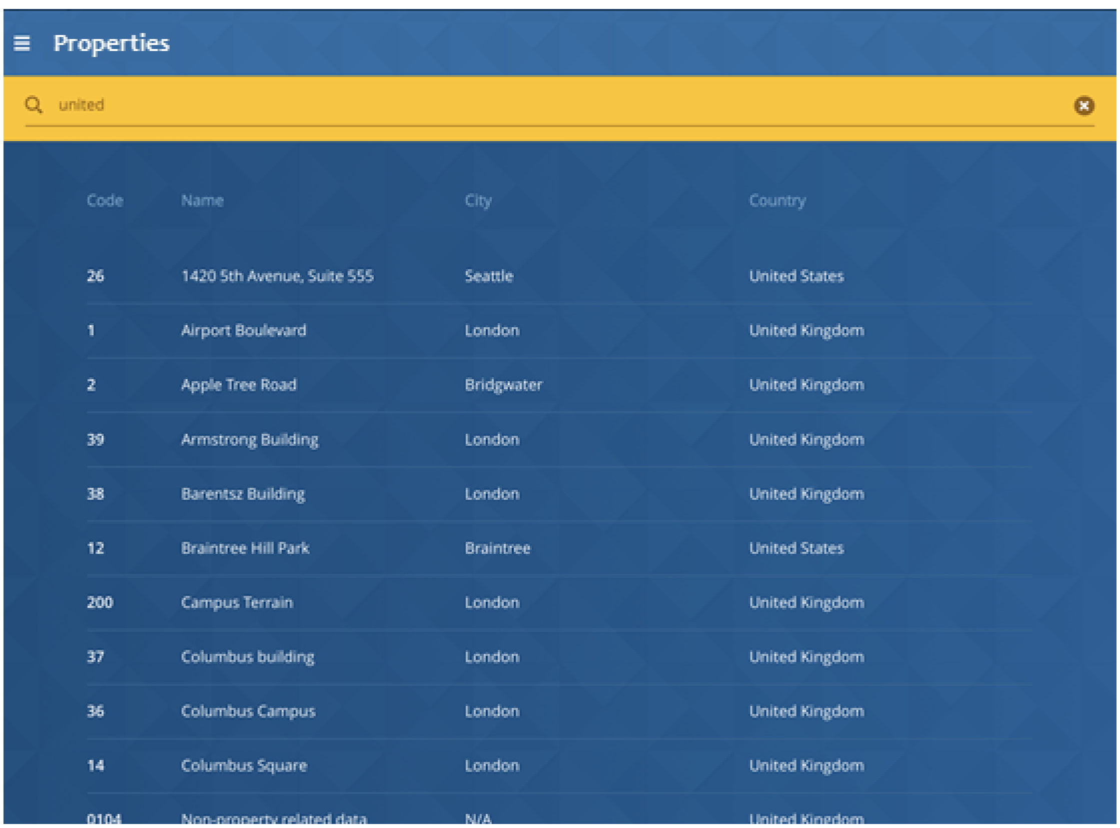
If you select the **Properties** module on the AppSuite's side bar, a search page is displayed.




You can start searching for properties by entering (part of their) **Code**, **Description**, **Country** or **City** in the search bar.



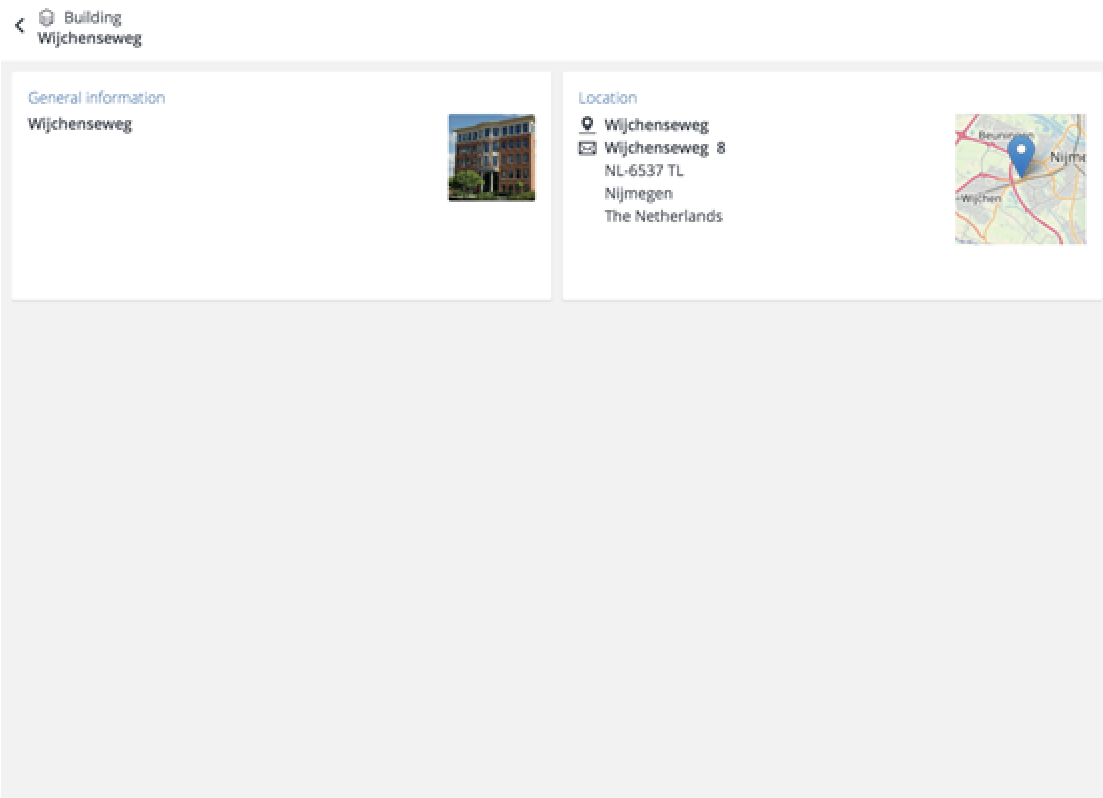

The search results are displayed in a list, with a maximum of 100.



# Property information blocks

The following information blocks are displayed for a selected property:

- General information on the property, such as name and photo.
- Location of the property, such as the address and a map.



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