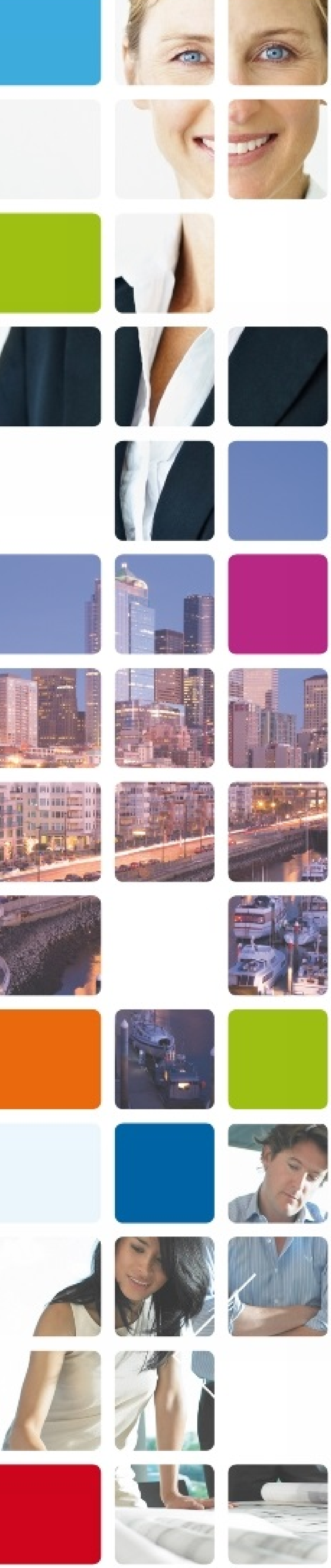

Essentials Edition

Version: 1.0

Work orders

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About Work Orders

Work Orders provides the pivotal crucial features related to work management and helps streamline your order related processes. Whether you want to create, track or manage orders of different kinds, such as work orders, service requests, reservations or requisitions, the Work Orders TSI offers plenty of solutions. Front office and back-office activities come together in Work Orders , offering you the ideal tool to keep full control over your workflow.

Interaction with other TSIs

TSI	Relation with Work Orders
Service Desk: is used by front-office employees to register and allocate service requests, complaints, faults and requisitions from FM customers.	All requests and requisitions that are registered in the **Service Desk** TSI are processed and monitored in the **Work Orders** TSI.
Planned Maintenance : deals with maintenance of assets.	The maintenance orders that are added in **Planned Maintenance** can be processed and monitored in **Work Orders** .
Technical assets : enables you to register and retrieve data on your company's assets, such as installations, systems, furniture and other assets.	Any incidents or problems recorded in Service Management can be linked to configuration items in **Technical assets** .

Work Orders - Concepts

For a better understanding of Work Orders , the concepts in Work Orders are explained in this section.

Orders

All FM or maintenance tasks and activities that are directly registered in Work Orders or registered via associated Web Client TSIs, such as **Service Desk**, **Reservations**, Moves and **Maintenance Manager**. Orders can also be entered via Planon Self-Service or via apps such as Planon Mobile Field Services.

Order types

Order types are either predefined system order types, or user-defined order types that have been specially created for your organization.
The following table describes the system order types that are available in Essentials Edition .

Order types	Planon icon	Primary TSIs
Work orders		Work Orders
Requests		Service Desk, Work Orders
Maintenance orders		Work Orders , Maintenance Planner

Requests

Service requests that are added by front office personnel in **Service Desk** or by building users via **Planon Self-Service** are processed and monitored by back-office staff in Work Orders . It is also possible to add, modify and delete requests directly in Work Orders .

For more information on adding a request, refer to Adding orders.

Maintenance orders

Maintenance orders are generated in **Maintenance planner** for individual activities or clusters of activities in a maintenance plan. After the order generation, the maintenance orders including order lines, estimates and check list items are automatically added at **Orders** and **Order details** in Work Orders . In Work Orders you can monitor these maintenance orders, add suborders to them and change their status.

The corresponding maintenance activities, from which the maintenance orders have been generated, can be viewed at **Order details > Maintenance activities**. Any checklist items that belong to a maintenance order are available at **Order subdetails**, where they can be used to generate forms (for example job tickets) with the **Report Manager**.

Order hierarchy

Orders are hierarchical elements, which means you can add suborders of various types to a main order. Suborders can inherit some field values from the main order, such as the property and order group. The name and code of the main order to which a suborder belongs, is displayed in the **Parent level** field.

If the **Parent level** field is not available on your suborder's layout, contact your Essentials Edition administrator for more information.

The following tables display the order types that you can add as suborder to the various order types. The top rows lists main order types, the left column lists suborder types. **Y** indicates that you can add this type of suborder to the main order and **N** indicates that you cannot.
Note that some order types cannot have suborders at all.

Main order > **Suborder v**	**Request**	**Work order**	**Maintenance order**
Request	N	N	N
Work order	Y	Y	Y
Maintenance order	N	N	N

Order costs

Order costs (either internal or external) can be registered in Essentials Edition .
For more information on how to register costs in Essentials Edition , refer to Cost management in Work Orders .

Order groups

Order groups are used to categorize orders systematically into logical groups. For example, Health safety, FM services and so on.

An order group is a hierarchical element which can be divided into subgroups. You can create a maximum of five levels.

Order groups are available at the **Components** selection level. By selecting an order group before going to the **Orders** selection level, you can filter out orders that belong to the selected order group.

Order defaults

Your Planon application manager will configure *defaults* on orders to specify which tradespeople or coordinators, either internal or external, are presented to you as default values on the order's data section, as soon as you select a specific property, order group or trade for which these defaults have been registered.

Preferred or default tradespeople and coordinators are linked to either a trade or an order group.

For more information on the configuration of defaults and preferences, refer to Supporting data > Defaults and preferences.

Legend for priority coloring

You can click **Legend priority coloring** on the action panel to display the **Priority order coloring** dialog box.

The **Legend priority coloring** displays the coloring scheme for the selected order. The legend makes clear why the orders in the elements list are displayed in a certain color. Each color corresponds with a different priority

The **Legend priority coloring** is only available for those order types for which priority coloring is actually configured.

For more information, refer to Supporting data > Priority coloring.

The **Legend priority coloring** is NOT available:

- If no color settings are configured in the Priority coloring TSI.
- If no order with color priority settings is selected in the elements list.

Workflow and status transitions

All order types have predefined statuses and status transitions to indicate the current phase a particular task is in. For example **Reported** or **Request in progress**.
The number and type of status transitions available on the action menu depend on the settings that were made in your specific situation.

Working with Work Orders

The Work Orders TSI in Essentials Edition is a 'hub' where the workload is registered to be monitored, prepared, allocated and administratively completed.

This chapter explains the processes that can be performed in the Work Orders TSI.
Your entire order administration, including workflow, use of 'standard' orders, costs management is outlined in this chapter.

Substantial numbers of orders may generated within your organization on a daily basis. These orders are likely to be classified into many different types. The way your Planon environment is configured, determines which orders are shown to you.

Depending on your configuration, you can create two of orders in Work Orders , such as:

- Work orders
- Requests

Retrieving orders using the Components level

You can retrieve specific sets of orders using the various filter criteria available on the **Components** level.

Procedure

1. In Work Orders , go to **Components**.
2. Select a relevant selection step:
    - **Order groups**
    - **External tradespeople**
    - **Internal tradespeople**
3. In the element list, select one or more elements. For example, one or more internal tradespeople.
4. Go to the **Orders** step. All the orders related to the selected internal tradespeople on the **Components** level are displayed.

Adding orders

The procedure to add a new orders of any order type is as follows:

Procedure

1. Go to **Orders**.
2. On the action menu, click **Add** and select the required order type (Request, Work order).
3. Complete the fields in the data section.

   For more information on the available fields, refer to Order fields.
4. The newly added order is automatically given an initial status. If required, you can still modify the order data at this stage. For the available statuses of an order, refer to Workflow and status transitions.
5. Click **OK**.

A new order is created.

Adding a suborder

You can add one or more suborders to a main order.

Procedure

1. Go to **Orders**.
2. Click **Add sub** on the action menu. The newly added suborder is automatically given an initial status.
3. Complete the fields in the data section. For more information on the suborder fields refer to Order data.
4. Click **OK**. A new suborder is created.

Adding large numbers of suborders to an order can have a negative impact on the performance when processing orders. It depends on your local infrastructure how much the number of suborders will affect the performance.

Adjusting the view of the orders list

To find relevant order information more quickly, you can adjust the view of the orders list in several ways, using the toggle buttons that are available at the top of the list.

The order list view can be toggled in several ways to obtain a different *focus* on the orders in the list. This can help you to retrieve the required information quicker. You can, for example, extend the list by displaying related or archived orders, or apply coloring to indicate the orders' priority. See the following sections for more information:

- Show related orders
- Show related orders on update
- Show color based priority
- Show where documents are attached
- Show archived orders

Show related orders

If you want to view the orders in their 'family' context, irrespective of the selection you have made, click the **Show related orders** toggle button in the element list toolbar, to display the related main orders or suborders.

If the button is activated, orders which are a member of the selected order's 'family' are also displayed in the elements list, in a lighter shade, even though these orders do not belong to your current selection.

Show related orders on update

It is possible to have the related orders of an order displayed after saving an update, such as changes in field information, status transitions or adding suborders. This enables you to work on a different order within the same order context.

By clicking the **Show related orders on update** toggle button on the element list toolbar, the whole context of related orders is shown in the elements list after saving the order.

Show color based priority

If the **Show color based priority** setting is applied, the order descriptions in the elements list are displayed in different colors. The order descriptions are colored in accordance with the settings made in Supporting data and with **Date-time coloring** set on the order.

> For more information on coloring orders based on priority settings, refer to Supporting data > *Priority coloring.*

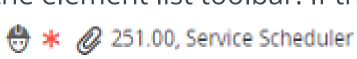
If you click the **Show color based priority** icon on the toolbar, the **Color based priority settings** dialog box opens where priority coloring can be enabled for orders.

The settings also determine the range within which order coloring will be applied, if their **Date-time coloring** falls within the set range.
You set the range of days with reference to the current date.

These settings can be made per worker / engineer so that he / she is informed about the priority of the completion of the orders.

Show where documents are attached

If you want to visually see which orders have documents linked (via communication logs), click on the **Show where documents are attached** button in the element list toolbar. If there are documents attached, a paperclip icon



will be displayed next to the order description in the element list. You can then go to **Order details** > **Communication logs - orders** and review the attachments.

The icon is only displayed if one of the following fields in **Communication logs - orders** has a value:

- **Document**

- **Secure Document**

Show archived orders

In order to limit the number of orders displayed in the elements list and to reduce the loading time of the numerous archived orders, you can specify a period for which archived orders must be displayed. By default, archived orders are displayed over a five year period prior to the current system date. You can change the period to be displayed upon opening the archive.

Procedure

1. Go to the **Orders** level.
2. On the element list toolbar, click the **Show archived items** toggle button.

   The **Archive settings** pop-up opens.
3. Select the **From** and **To** dates to enter the period for which the archived orders must be displayed.

   The archive is shown dynamically according to the default date settings: if the **From** date field is set to the exact current date – 5 years and if the **To** date field is set to the exact current date, for example, if today is 02-03-2020, the period taken is from 02-03-2015 till 02-03-2020. The next day, the pop-up will display the period from 03-03-2015 till 03-03-2020.
4. Click **OK**.

The archived orders are displayed for the specified period.

If you want to adjust the archive period to be shown, for example to less than five years, you can use macros to do that.

Making an order recurrent

You can make an existing order recurrent to save the effort of repeatedly adding the same order.

It is possible to repeat an order at regular intervals, for example:

- daily
- weekly
- monthly
- in the first week of each month
- repetition without a fixed cycle.

Procedure

1. Select the order you want to make recurrent.
2. Specify a start date-time for this order.
3. On the action panel, click **Make recurrent**.

   The **Schedule** dialog box appears.
4. Select the required **Frequency**: **Daily**, **Weekly**, **Monthly**;

   OR:

5. Select the **Calendar** option to repeat orders with irregular intervals and click the required dates.
6. Depending on the selected frequency, fill in the **Period** section.

   You can either set a period manually or select a predefined one. If you set the period manually, select a date in **Starts on** and either select the number of recurrences in the **Create recurrences** field or enter an **Ends on** date.
7. In the **Occurrences** section, specify when you want to repeat the selected order and - if relevant - on which day of the week.
8. Select **Save settings** if you want to save your choices for later use. Previously saved choices can be retrieved by clicking **Load settings**.
9. Click **OK**.

   Confirm the number of recurrences in the **Question** dialog box.
10. Click **OK** to proceed or **Cancel** if you want to modify the schedule.

    After clicking **OK**, the order is made recurrent.

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

> Note that the limit for the number of recurrences to be created is 200.

Repeating a suborder in recurrent orders

If you add a suborder to one particular order in a series of recurring orders, Essentials Edition asks if you want to repeat this suborder for all the recurring orders.

Procedure

1. Select **OK**. The suborder is automatically added to all the recurring orders.

   If you select **Cancel,** the suborder will be added only to that particular recurring order.
2. If you decide at a later stage that you want to repeat the suborder, select the suborder and click **Repeat suborder within group**. This will add a copy of the suborder to all the future recurring orders.
   - For all recurring orders, Essentials Edition will automatically populate the Recurrence group field with the number and description of the original order.
   - All recurring orders will get the default initial status even if the original order has another status.
   - If the original order includes order line costs, these are also adopted for the recurring orders.

Modifying a recurring order

It is possible to modify a recurring order.

To modify a recurring order, proceed as follows:

Procedure

1. Retrieve the recurring order for the date from which a modification should be applied.
2. Modify the data for the (recurring) order as necessary.
3. Click **Save**. Essentials Edition asks you if you want to modify future recurring orders.
4. Click **Continue** if you want to modify future recurring orders.

   All future recurring orders will be modified.
5. If one or more fields of a particular order in a series of recurring orders are modified manually, Essentials Edition displays a warning (per recurring order).
   This warning shows the number and description of the recurring order and the fields that deviate from the original order.
6. Select the appropriate option on the warning message to proceed further. Note that any changes to recurring orders that were already saved will not be undone.

Archiving orders

Orders that are completed can be transferred to the archive. You need special authorization to archive orders. You can only archive orders (of any order type) if they have been assigned one of the following statuses:

- **Administratively completed**
- **Canceled**

Procedure

1. In the elements list, select the order you want to archive.
2. On the action panel, click **Transfer to archive**.

   The selected order is archived.

- Once orders are archived, they are read-only, unless your order settings specify otherwise.
- To archive groups of orders, use the **Action on selection** feature. For more information on using **Action on selection**, refer to *Fundamentals*.
- Sub-orders of a standard order can be archived independently. When you view archived items, the archived sub-order will be displayed along with its main order. For more information on viewing archived orders, refer to Show archived orders.

Retrieving orders from the archive

Depending on you order settings, you may be able to modify archived orders. If you want to make changes to archived orders, you must first retrieve them from the archive.

Procedure

1. Go to the **Orders** level.
2. On the elements list toolbar, click the **Show archived items** toggle button.

   The **Archive settings** pop-up opens.

3. Select the **From** and **To** dates to enter the period for which the archived orders must be displayed.
4. In the elements list, select the order(s) you want to retrieve from the archive.
5. On the action panel, click **Retrieve from archive**.

   The archived order is retrieved and displayed in the elements list when the **Show archived items** feature is disabled.

Major and related requests

If the service desk receives multiple similar requests, the service desk employee can designate one of the incidents as **Major** request and link all similar requests to this major request. This will enable you to keep related requests together and address them at the same time. Once a request is linked to a major request, any changes (fields / statuses) on the major request are carried through to the related requests.

> Changes made to suborders, communication logs and other order details are not carried through from the major request to the related requests. You cannot create major or related requests for standard orders.

Major requests can be characterized by their impact on a significant number of customers/users. For example, a request about failing network communication may be reported by multiple employees, because the problem is critical and has a high priority. It will be easier for the responsible department to work on a single request with linked similar requests, since they will be working on resolving the same problem.

Creating a major request

Procedure

1. Go to **Orders**.
2. Select a request that you want to promote to major request.
3. In the data panel, select **Yes** in the **Major?** field.
4. Click **Save**.

   The selected request is designated as major request.

Copy from major request

Procedure

1. Select a major request from the list.
2. On the action panel, click **Copy from major request**.
3. Click **Save**.

   A new request is created which is automatically linked to the selected major request.

> The **Copy from major request** action is only available if the major request still is in its initial status and not archived nor canceled.

Linking similar requests to a major request

Procedure

1. Go to **Orders**.
2. Select the request(s) that you want to link to the major request.
3. On the action panel, click **Link to major request**.

> The action **Link to major request** is only available for non major requests and the action **Unlink from major request** is only available for linked/related requests.

   A warning is displayed.

4. Click **Continue** on the warning.

   The **Link to major request** pop-up opens. The pop-up only displays requests of the same user-type in the selection.

5. Select a major request from the list.

> There is an option **Show completed request** to display completed requests in the list. Canceled major requests are not displayed.

6. Click **OK**.

   After linking, the major request is automatically displayed in the **Major request** field of all linked requests.

> Once a request is linked to major request, any fields other than **Requestor** and **External requestor** can no longer be changed, as they are taken over from the major request. The **Standard order** field is not taken over from the major request and is not kept in sync.

> You can still add suborders, communication logs and any other order details independently, for both major and related requests. They will not be taken over from the major request.

To unlink a request from a major request, click **Unlink from major request** on the action panel.

> You can link or unlink multiple requests using the **Action on selection** option.

Calculating the Requested completion date

The **Requested completion date** of an order is calculated from the interval between the priority and the moment of starting an order.

The following fields determine the moment an order is started:

- The **Start date-time** in case of suborders under Planned maintenance orders / Recurring orders.
- The **Reported on** (InsertDateTime) or (if populated) **Original reporting date-time** in any other case.

The following scenarios explain how a company calendar is applied depending on the interval for the priority:

- If the priority interval is in years/months/weeks, non-working days and non-working hours (both normal and deviating) are not taken into account.
- If the priority interval is in days, only non-working days (both normal and deviating) as defined in the applicable calendar are taken into account.

> If the date-time of the field used for calculating the **Requested completion date** is outside working hours, the first possible date-time within working hours on a working day is used for the calculations.
> Similarly, if the calculated requested completion date is outside working hours/days, then it is set to the first possible date-time that is within working hours on a working day.

- If the priority interval is in hours, the calculation is similar to a priority in days. However, non working hours (both normal and deviating) as defined in the applicable calendar are taken into account as well.
- If the priority interval is in minutes, non-working days and non-working hours (both normal and deviating) are not taken into account. This is because for this priority, the work is considered to be so urgent that it should be carried out irrespective of working hours/days.

> If an order is resumed from an 'On hold' status, the **Requested completion date** is recalculated.

Example:

Calendar: working hours Mon-Fri 9:00 - 17:00

Reported on (InsertDateTime)	Priority	Requested completion date-time
Fri 3/4/2020 16:00	120 min	Fri 3/4/2020 18:00
Fri 3/4/2020 16:00	2 hrs	Mon 6/4/2020 10:30

Reported on (InsertDateTime)	Priority	Requested completion date-time
Fri 3/4/2020 16:00	1 day	Mon 6/4/2020 16:00 (working hours are not taken into account)
Fri 3/4/2020 16:00	24 hrs	Wed 6/4/2020 16:00 (working hours and working days are taken into account)
Fri 3/4/2020 18:00	120 min	Fri 3/4/2020 20:00
Fri 3/4/2020 18:00	2 hrs	Mon 6/4/2020 11:00
Fri 3/4/2020 18:00	1 day	Tue 6/4/2020 09:00
Fri 3/4/2020 18:00	1 week	Fri 10/4/2020 18:00 (working days are not taken into account)
Fri 3/4/2020 18:00	7 days	Tue 14/4/2020 18:00 (working hours are taken into account)
Fri 3/4/2020 18:00	1 month	Sun 3/5/2020 18:00

Working with maintenance orders in Work Orders

In **Maintenance planner** you can generate maintenance orders per maintenance activity or per cluster of activities in a maintenance plan. After order generation, the maintenance orders, estimates and check list items are automatically added at **Orders** and **Order details** in Work Orders . In Work Orders you can monitor the progress of these maintenance orders, add suborders and change the order status.

If you accept an order, it does not mean that any corresponding activities are set to **In progress**. The **In progress** status has to be selected per individual activity.

The corresponding maintenance activities, from which the maintenance orders have been generated, can be viewed at **Order details** > **Maintenance activities**.

Any checklist items that belong to a maintenance order are available at **Order subdetails**, where they can be used to generate forms (for example job tickets) with **Report Manager**.

For more information on working with **Maintenance Manager**, refer to *Maintenance Manager*. For more information on working with **Report Manager**, refer to *Report Manager*.

Working with standard orders

In Essentials Edition , standard orders are a kind of 'template' orders that considerably speed up the process of feeding new orders into the system. It may be practical to use standard orders for frequently recurring requests, tasks or activities.

If you use standard orders for adding new orders, much of the order data is automatically populated. Standard orders can include a number of standard suborders.

For information on creating and maintaining standard orders, refer to Supporting data .

Adding an order based on a standard order

You can add an order based on a standard order either by:

- selecting a standard order via the **Add standard** option on the action menu.

  or
- by adding an order and subsequently selecting a standard order on the **Standard order** field.

You can add a standard suborder to your main order by using the **Add standard sub** option on the action panel.

Procedure

1. Go to **Orders**.
2. On the action panel, click **Add standard**.
3. The **Standard orders** dialog box opens.
4. Select a standard order from the list.
5. Click **OK**.
6. If the standard order includes any suborders, a dialog box appears.
   Select the suborders you want to include in the new order.
7. Click **Continue**.
8. A new order is added, whose data fields are filled with data from the standard order.
9. Enter any additional data you may want to add in the relevant fields, or modify the data you may want to change and click **Save**.

   You have now added an order based or a standard order. This order has the same status transitions and other order related functionality as a regular user-defined order of the same order type.

For general information on field changes, refer to Orders and Field Changes.

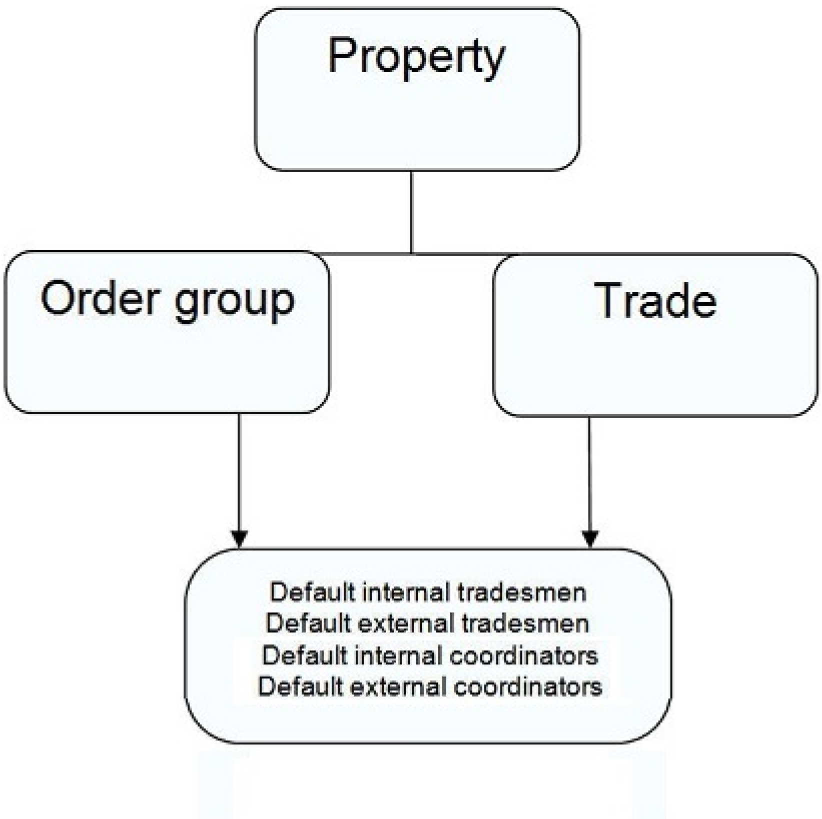
For more information on default data, refer to Order Preferences and Defaults.

Order defaults

In Essentials Edition , you can specify which tradesmen or coordinators, either internal or external, as default values when creating orders. This will considerably simplify making selections for end users.

Defaults are values that will be specified automatically on the data tabs of the order, as soon as a specific property and order group or trade - for which these defaults have been registered - is selected for the order.

Default tradesmen and coordinators are linked to either a trade or an order group. Additionally, defaults can also be linked to a specific property. The relations between the various elements are illustrated in the following image.



Working with defaults

You can define default values for coordinators/tradespeople, based on the default settings for the **Trade** or for **Order group** business objects.

Settings concerning preferred or default tradespeople and coordinators per property, trade or order group can be created in Default assignments.

> For more information refer to *Basic Data* > *Default settings*.

In orders, when adding or modifying orders, default internal/external coordinator/tradesperson field values are searched in the following sequence:

1. If no default value is available for the **Service company** field, the default defined for the asset is used.
2. If the *1, Trade / Order group* option is selected, the default settings are assigned in the following order, depending on the availability of the default values in the business object combinations:

   BOProperty / BOTrade combination

   ↓ (if no default value is available)

   BOProperty / BOOrderGroup combination

   ↓ (if no default value is available)

   BOTrade

   ↓ (if no default value is available)

   BOOrderGroup

3. If the *2, Order group/Trade* option is selected, the default settings are assigned in the following order, depending on the availability of the default values of the business object combinations:

   BOProperty / BO BOOrderGroup combination

   ↓ (if no default value is available)

   BOProperty / BOTrade combination

   ↓ (if no default value is available)

   BOOrderGroup

   ↓ (if no default value is available)

   BOTrade

Cost management in Work Orders

Order costs, internal or external, can be registered in Essentials Edition from the time you start receiving quotations till the time you start paying your bills (invoices).

Cost related data can be registered at the **Order details** level.

See the links below for more information:

- Cost overview
- Adding estimates
- Adding actual costs
- Deleting order costs
- Adding labor-hours

Cost overview

On the **Order details** level, you can find an overview of the costs linked to an order. Each of the cost-related selection steps, **Estimates**, **Actual costs** and **Man-hours**, displays the total costs (including and excluding VAT) on that step and a complete overview of all costs.

Total estimated costs | Order costs overview

Description	Costs	Surcharge	Labor hours	Hours x tariff	Total costs excl.	Total costs incl.
Estimates	€ 70.05		0	€ 0.00	€ 70.05	€ 84.06
Actual costs	€ 70.05	€ 0.00			€ 70.05	€ 84.06
Labor hours			2	€ 80.00	€ 80.00	€ 96.00
Balance	€ 0.00	€ 0.00	-2	€ -80.00	€ -80.00	€ -96.00

If there are suborders with associated costs, you can select the **Show suborder details** button in the element list toolbar to display the totals of all suborders in the cost spreadsheet:

The costs are displayed as follows:

- The **Total [...] costs** tab displays the total costs of either the *active estimate*, the *actual costs* or the *man-hours*. If you have activated a filter, this filter is also applied to this tab.
- The **Order costs** overview tab displays the total actual costs, the total estimated costs and the total man-hours costs of the order(s) you selected on the **Orders** selection level.
  Any activated filters will not be applied to this tab.

> You can also view a cost overview on the **Orders** selection level, by clicking **Show cost overview** on the action panel.

Adding estimates

The **Estimates** selection step is used to enter the estimated costs on an order. Several estimates can be linked to an order, but only one estimate is actually used in subsequent calculations.

Procedure

1. Go to **Order details** > **Estimates**.
2. On the action menu, click **Add**.
3. Fill in the required information in the data section. For the field information, refer to Estimates data.
4. Active estimates are added to the selected order. The **Total estimated costs** tab displays the data that have been entered for the estimate on all cost related steps.
   Once all internal and external costs are known, these can be entered on the **Man-hours** and **Actual costs** selection steps. Refer to Adding actual costs and Adding labor-hours.

Adding actual costs

As soon as invoices from external tradespeople are received, you can start registering the actual order costs on the **Actual costs** selection step.
You can also add costs that are charged by other departments or business units within your own organization.
Multiple actual costs lines can be added to a single order.

Procedure

1. Go to **Order details** > **Actual costs**.
2. Click **Add** on the action menu.
3. Enter the required information in the data section. For the field information, refer to Actual costs data.
4. Click **Save**.

   The actual costs are added.

Estimated costs vs. Actual costs

An order can have estimates and actual costs.

When an order is linked to a budget, the estimate and the sum of the actual costs must have the same sign (+ or -). If you want to adjust the actual costs, you can add costs with an opposite sign as long as the **Total actual costs** still have the same sign as the estimate (see case 3).

	Estimated costs	Actual costs	Total actual costs	Allowed?
1	1000	800	800	Yes
2	1000	-800	200	No
3	1000	800		
		-200	600	Yes

If the order is not linked to a budget, these signs can differ:

	Estimated costs	Actual costs	Total actual costs	Allowed?
1	1000	800	800	Yes
2	1000	-800	200	Yes
3	1000	800		
		-200	600	Yes

Deleting order costs

If an order is canceled, the costs associated with the order are no longer valid and can be deleted. Deleting order costs is only possible for orders of the *work orders* type.

> If a cost line of an order line is deleted, the budget used for the work order is recalculated and the amount is credited back to the budget.

Procedure

Adding labor-hours

You can add **Labor-hours** to specify the costs of internal labor-hours that are spent on a particular order. If a tariff group is specified for labor-hours, Essentials Edition will automatically calculate the costs involved, based on this tariff group information.

The labor-hours information can be added at **Order details** > **Labor-hours**.

On the **Orders** selection level, you can also quickly add labor-hours on the order itself, using the **Add labor-hours** action on the action panel.

For information on adding orders, refer to Adding orders.

For information on the labor-hour fields, refer to Labor-hour fields.

Generating forms

If your organization uses the Report Manager, various forms can be created for orders, such as job tickets, request confirmations, internal or external order forms and quotations. All kinds of registered order data can be included in a form, for example a description, number, start date, space, comment or tradesperson.

Based upon a template form, a form can be generated for a specific order and subsequently be printed, mailed or attached to this order as an order document.

See the links below for more information:

- Creating a template form
- Adding a form to an order
- Previewing forms
- Emailing a form
- Editing an email

Creating a template form

In a template form you add data that is required for generating an order form. For example: the addressee and the mail merge report to be used.

Prerequisite

- A mail merge report must be defined in Report Manager. This mail merge report must be created using a template file in any of the Essentials Edition supported formats, such as, .html, .rtf, .doc or .docx, containing the merge codes.

> For more information on creating mail merge report definitions and template files for forms, refer to *Report Manager*.

While creating a template form, you can also attach up to three files to be sent with the email by default on completion of a particular type of request.
For example, a service desk manager can create a template form with up to three default attachments that will be sent with an email on completion of the request made by the user.

Procedure

1. Create a mail merge report via the **Report** action in Work Orders .

> For more information on creating mail merge reports, refer to *Report Manager*.

2. Click **Add form** on the action panel. The **Forms** dialog box appears.
3. Click **Add** on the action panel.

You can also copy the existing form using the **Copy** action on the action panel.

4. Complete the fields in the dialog box. For more information, refer to Forms data.
5. Click **Save**. A new template form is created.

The values specified in the **Addressee** and **Copy to** fields are derived from the corresponding order. For example, if the addressee is an internal tradesman, the **Internal tradesman** field of the order should contain a value, otherwise you cannot email the form.

Retrieving a form for an order

Procedure

1. Go to **Orders**, select the order for which you want to retrieve a form.
2. On the action menu, click **Add form**.

   The **Forms** dialog box opens, displaying all forms that are available to the selected order. If the list is empty, click **Show all template forms** to see more forms.

In the **Add from** dialog box, if the **Show all template forms** check box is selected, the setting will be remembered (per user) and will be reflected when you open the dialog box. Clearing the user settings will discard these settings.

The forms displayed in the elements list of the **Forms** dialog box also depend on the status and order type of the linked order and on your personal authorization.

Previewing forms

You can preview a form or job ticket. Forms with .html templates are opened in a browser. Forms with any other template, for example .doc/.docx/.rtf, are opened in MS Word or any other application associated with the file extension.

Procedure

1. In the **Forms** dialog box, select the form you want to preview. For more information on retrieving forms, refer to Retrieving a form for an order.
2. On the action menu, click **Preview & print**.

   The form opens for previewing in your browser (.html) or in MS Word (any other template format).

Prerequisites for emailing a form

- In order to email the form of a selected order, the email server settings must be specified in **System Settings**.
- The addressee's email address must be filled in the contact details in Personnel .

Editing an email

Procedure

1. Select the form you want to edit before sending it as an email.

   For more information on retrieving forms, see Retrieving forms for orders.
2. On the action menu, click **Edit email**. The **Extensive mail messages** dialog box appears.
3. Enter the email address of the recipient in the **To** field. Multiple email addresses can be provided here.
4. If required, you can provide additional email addresses in **Cc email address** and **Bcc email address** fields.
5. Select **Yes** in the **Email as attachment** field, if you want to send the form as an attachment.

   Note that the forms saved in .doc, .docx, and .rtf formats will always be sent as an attachment.
6. You can provide additional documents as attachments in the **Attachment - document 1**, **Attachment - document 2**, and **Attachment - document 3** fields.
7. In the **Content** field, type the text that will be displayed in the email body.
   - For the forms saved in .html format, the HTML text is displayed in the content field. If **Yes** is selected in the **Email as attachment** field, the entire content field including any other additional changes to the content will be sent as attachment and stored in the order document that is created. The email body will be empty.
   - For the forms saved in .doc, .docx, and .rtf formats, the text entered will be present in the e-mail body. It will not be present in the attachment nor in the order document that is created.
8. Click on the **OK** button to send the email.
   - If the option **Save file copy** is set to **Yes** in the form details, when you email a form and attachments are added, the attachments are zipped and stored along with the order documents.
   - The attachments that you add, while editing an email, are sent with the current email only. They will not be delivered with the subsequent emails.
   - For more information on adding default file attachments, refer to Creating a template form.

All actions on forms (except the **Preview** action) will create order documents. Additionally, if **Save file copy** on the form is set to **Yes**, a physical document is also created in the **File locations** folder.

Communication logs

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

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

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

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

System reports - Work Orders

The following section describes the system reports that are available in Work Orders .

There are two types of reports in **Work Orders** :

- Costs overview
- Completion

These reports are available on every TSI level where orders are displayed.

You can access the system reports from the action menu, **Reports** > **System reports** tab. You can **Save**, **Preview** or **Edit report settings**.

For the available settings on the **Costs overview** and **Completion reports**, see System report settings.

Costs overview

The **Costs overview** report displays an overview of the order costs.

The report contains Hours, Estimate costs, Man-hours and Actual costs.

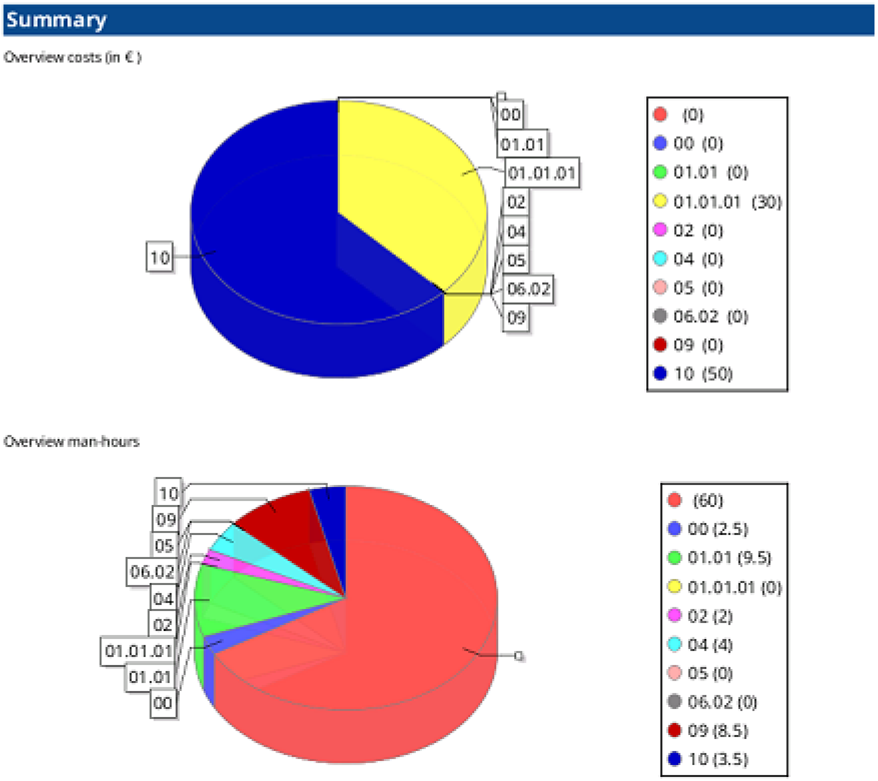
Example of a Costs overview report:

Planon costs overview

Date: 07/14/2016
Supervisor
Costs excluding VAT

Number	Description	Hours	Estimate costs		Man-hours	Actual
27.00	Book space	0.00	0.00	€	0.00	7.50
25.00	Book space	0.00	0.00	€	0.00	12.50
23.00	Book space	0.00	0.00	€	0.00	7.50
21.00	Meeting Control & Accounting	4.00	0.00	€	0.00	11.25
19.00	Meeting Control & Accounting	0.00	0.00	€	0.00	11.25
17.00	Training Planon Accelerator	0.00	0.00	€	0.00	35.00
17.01	Panasonic HDC-SD9	0.00	0.00	€	0.00	15.00
17.02	Beverage	0.00	0.00	€	0.00	9.00
17.03	Beverage	0.00	0.00	€	0.00	9.00
17.04	Food	0.00	0.00	€	0.00	25.60
15.00	Training Planon Accelerator	0.00	0.00	€	0.00	35.00
15.01	Panasonic HDC-SD9	2.00	0.00	€	0.00	15.00
15.02	Beverage	0.00	0.00	€	0.00	9.00
15.03	Beverage	0.00	0.00	€	0.00	9.00
15.04	Food	3.00	0.00	€	0.00	25.60
13.00	Presentation Sales Department	0.00	0.00	€	0.00	27.50
13.01	Equipment room reservation	0.00	0.00	€	0.00	10.00
11.00	Presentation Sales Department	0.00	0.00	€	0.00	27.50
11.01	Equipment room reservation	0.00	0.00	€	0.00	10.00
9.00	Managers meeting	0.00	0.00	€	0.00	15.00
9.01	Catering room reservation	0.00	0.00	€	0.00	6.75
Totals		9.00	0.00	€	0.00	333.95

The report also contains a summary of **Overview costs** and **Overview man-hours** in a pie chart (default) or 3D bar chart. For example:



Completion

The Completion report displays an overview of orders and their statuses.

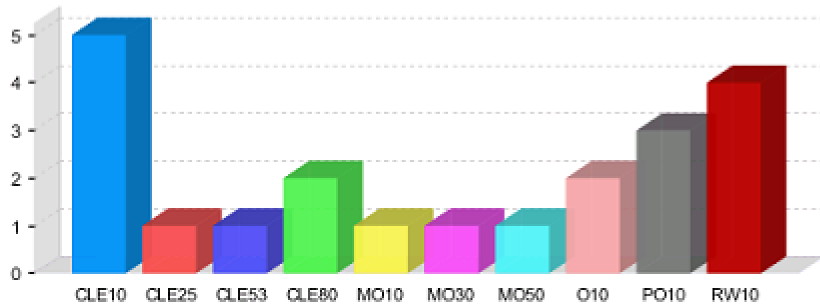
It shows the statuses and the number of orders in those statuses, grouped by the field selected in the settings.

Example of a Completion report:

Completion report by Budget	Date: 07/06/2016 All LC in UK

Unknown group

Status	Number of orders
CLE10 Reported	5
CLE25 Cancelled	1
CLE53 In progress	1
CLE80 Administratively completed	2
MO10 Move order reported	1
MO30 Assigned	1
MO50 Administratively completed	1
O10 Reported	2
PO10 Reported	3
RW10 Reported	4



Impact of field changes in orders

Modifying order data can have an impact on other order data. This is caused by the fact that fields which represent Planon elements, such as orders, properties, spaces, tradesmen etc., are often mutually dependent.

As a result, changing field data in one place will frequently influence another field's data. Mutual dependencies between elements and the corresponding fields occur as a result of making settings, applying drilldown selections, applying standard orders or using default/preferred tradesmen.

Examples

- If you add a person in the Personnel TSI > **Personnel** selection level and you specify a space in the **Space** data field, which belongs to a different property than the property from which you made your drill-down selection, the original property in the **Property** field will be replaced by the property from the selected space.

  For more detailed information on this subject, refer to Field change sequence in Work Orders .

Field change sequence in Work Orders

If you modify field data at the **Orders** selection level, other field data may change automatically, because (default) data of one element is dependent on (default) data of another element. If a series of automatic changes takes place, some data changes take precedence over other data changes. The following table specifies which field data 'outrank' other field data.

Field data which is linked to high-ranking elements (i.e. those with the highest numbers) will overwrite the data of lower-ranking elements.

As you can see, data in the **Priority** field can be overwritten quite easily, while **Standard order** data will overwrite the default data of most other elements. Refer to Field changes exemplified for some examples.

Sequence	Modification of field value
10	Priority
20	Cost center
30	Department
50	External tradesperson
70	Space
80	Requestor
100	Asset
115	Property
120	Order group

Sequence	Modification of field value
130	Trade
140	Externally assigned by
1000	Start date-time
1000	End date-time
2000	Standard order

Field changes that involve inheriting field values from other elements are not incorporated in this table.

Field changes exemplified

The following example shows a typical situation which will trigger field changes. Use the table in Field change sequence in Work Orders to find out which data will overwrite previously specified data in your own situation. The example given may help to identify other common situations in which field changes occur.

It would be impossible to list all potential interdependencies between fields and the resulting changes in field data, as innumerable variables are involved. These examples only serve to increase your awareness of potential interdependencies between fields.

As soon as a requestor is specified for a new request in the Work Orders TSI, the property and space linked to this requestor are automatically copied to the request. If you subsequently modify the requestor in an existing request, any data which was previously specified in the **Property**, **Space**, **Department** and **Cost center** fields will be overwritten.

For example:

A requestor Alice Jones is not linked to any work space yet. A work space is specified for requestor Alice Jones. This work space is linked to Office *310*. Consequently, space *310* is automatically entered in the **Space** field. In this case, the work space *wp1* is specified for requestor Alice Jones. This work space is linked to Office *310*.

Work Orders - Field descriptions

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.
Status	Displays the order's status, as selected on the action panel. All order types have predefined 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. 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 an order group to which an order belongs. Select a priority from the list to specify the term within which an order must be carried out. For more information on Priority, refer to *Supporting data* > *Maintaining priorities*.
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	It displays the number of hours needed to complete the order. Any changes to the tradesperson or the **Start date-time** will lead to recalculating the **End date-time**.

Field	Description
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.
To be approved by	The person who must authorize the order. For this field a pick list is available, containing people from the Personnel TSI.
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.
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 tradesperson	Select a person from the list. If an order is completed by an external company, the company responsible can be specified in this field. Use the available filter options to retrieve the right **External tradesperson**.
Internal tradesperson	Specify the employee responsible for carrying out 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.
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.
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.

Field	Description
	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, refer to Supporting data > *Priority Order Coloring*.
Reported on	Displays the date and time when the order was added.
Requested completion date-time (property)	The date and time when the order completion is due. This time represents the time zone of the property.
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 completion date-time** of the order 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.

Estimate fields

Field	Description
Code	Displays a unique code for the estimate.
Order	Displays the order for which an estimate is made.
Description	Specify a name for the estimate.
Estimate date	Displays the date on which the estimate is added. This date cannot be modified.
Number of hours	Enter an estimated number of hours for the order completion.
Costs	Enter the estimated costs.
VAT tariff	Select from the list a VAT tariff that applies to the general costs.
Costs excluding VAT	The total amount of estimated costs excluding VAT is calculated as follows: (number of hours * tariff per hour) + costs. The amount cannot be modified.

Field	Description
Costs including VAT	This calculation field displays the total estimated amount including VAT: ((number of hours * tariff per hour) + VAT) + (costs + VAT). The amount cannot be modified.
Tariff group	For each tariff group a VAT tariff and an hourly rate are specified. If you select a tariff group from the pick list, the **Hourly rate** and **VAT tariff (hours)** fields are automatically populated. The values in the fields can be modified.
Active estimated costs	Specify if this estimate is the active estimate to be used for the calculations. The last added estimate is automatically the active estimate. Only one estimate can be the active estimate.
Hourly wage	Once the **Tariff group** field has been completed, the hourly rate is automatically specified. The suggested value can be modified.
VAT tariff (hours)	Once the **Tariff group** field has been populated, the corresponding VAT tariff is automatically specified. The suggested value can be modified.
VAT amount hours	Essentials Edition automatically calculates the amount of VAT to be paid. This is done on the basis of the tariff selected in the **VAT tariff (hours)** field. The value in the field can be modified. The **VAT tariff (hours)** field is automatically emptied.
VAT amount	Here, the amount of VAT to be paid is automatically calculated. This is done on the basis of the tariff selected in the **VAT tariff** field. The value in the field can be modified. In that case, the **VAT tariff** field will be emptied automatically.

Actual costs fields

Field	Description
Description	Specify a description for the actual cost line.
Orders	Displays the number and description of the selected order.
Costs	Specify the amount spent.
Hour costs	Specify the amount spent on labor hours.
VAT tariff	Select from the list a VAT tariff that applies to the actual costs.
VAT amount	The amount of VAT to be paid is automatically calculated. This is done on the basis of the tariff selected in the **VAT tariff** field. The value in the field can be modified. The **VAT tariff** field is automatically emptied.
External tradesperson	Specify the business relation who sent the invoice. You can select an address of the **External company** address type from the pick list.
Costs excluding VAT	A calculation field for the costs excluding VAT: material costs + hour costs.
Costs including VAT	A calculation field for the costs including VAT: costs excluding VAT + VAT.
Entry date	The date on which the invoice is booked in.

Labor-hour fields

Field	Description
General	
Code	A sequence number is automatically added to each new labor-hour line. The code for the sequence number can be modified.
Description	Enter a description for the labor-hours.
Internal tradesperson	An internal tradesperson can be specified on the order and automatically displayed in this field. You can also select a different internal tradesperson here.
Number of hours	Specify the number of hours spent on the order / request.
Tariff group	If a tariff group is specified on the order, it will be automatically displayed in this field. However, this value can be modified.
Hourly wage	Once the **Tariff group** field is specified, the hourly rate is automatically updated. This data can be modified.
Surcharge hours %	A surcharge can be specified in this field, for example 150% for working during the night.
VAT amount (hours)	The VAT amount applicable to the labor-hours is automatically specified. This is done on the basis of the VAT tariff entered in the **VAT tariff** field. The value can be modified manually. In this case the **VAT tariff** field is emptied.
VAT tariff	Once the **Tariff group** field is specified, the corresponding VAT tariff is automatically updated. The suggested value can be modified.
Costs excluding VAT	The total costs for labor-hours excluding VAT: number of hours * tariff per hour.
Costs including VAT	A calculation field for the total labor-hour costs including VAT, namely: costs excluding VAT + VAT.
Order	In this field the number and description of the selected order are automatically specified.

Forms fields

Field	Description
Code	Enter a code for the form.

Field	Description
Name	Enter a name for the form.
Save file copy	Select **Yes**, to save a copy of the form to the location on your local disk.
Form	Select a mail merge report to be used when generating a form.
Save as PDF	Select **Yes** in order to save and send the mail merge document as PDF instead of its original file format. This only applies to forms in *.rtf,.doc or .docx* file formats.
User status	Select the order's user-defined status to which the form applies. The form will then appear when you open the **Forms** pop-up for an order in this status.
The following fields only apply when emailing forms	
Addressee	Select an addressee of the order template form. The addressee can be a person or address of an external requestor.
Copy to	Allows you to copy the form to other recipients.
Sender's email address	Select the email address that should be used to send an email.
Reply email address	Select the email address that should be used when the user replies to a sent email.
Email subject report	The report contains information about the fields to be shown in the email subject. By default, the email's **Subject** field contains the **Code & Description**. It is recommended to link a data-only report specifying the required content. For more information on data-only reports, see **Reports** > **Creating data-only reports**.
Save communication as	Select between **Order document** or **Communication log** on how you want to store your order documents.
Communication log type	When you select **Communication log** in the **Save communication as** field, this field is enabled and you can choose the type of communication log that your form/ticket is saved to.
Default attachment – document 1/2/3	Specify the location of the document(s) to be attached to the email by default. You can attach up to three documents.

System report settings

Parameters	Description
Title	Specify a title for the report.
Subtitle	Specify a subtitle for the report.
Report group by field	Select a field to group the report data by.
Use 3D bar chart	Select **Yes** to include a 3D bar chart in the report. A pie chart is displayed by default.
Show costs including VAT	Select **Yes** to display the costs including VAT. This field is specific to the **Costs overview** report.

Checklist item data on orders

Field	Description
Code	Enter a code for the checklist item.
Standard activity definition	Select a relevant standard activity definition from the dialog box.
Description	Enter a relevant description for the checklist item.
Sequence	Enter a number that reflects the order in which the checklist item must be carried out.
Comment	If relevant, enter comments to the checklist item. Information entered in this field, in either the Maintenance Library (standard activity definition) or by back-office personnel in Work Orders (on a maintenance activity) is not displayed on the mobile devices of field engineers, but remains visible only to the back-office. However, if a field engineer enters comments to the corresponding **Comment** field on the PMFS app, the information is uploaded periodically to the back-office and added incrementally to any existing comments.
Mandatory?	Select **Yes** to make the checklist item a mandatory part of completing the order.
Result	Displays the result for a checklist item, as selected on the PMFS app. The default value is **Not assessed**. The other results that can be selected are: **Assessed with observation** or **Done**. If you select **Assessed with observation**, it is mandatory to enter a reason in the **Reason** field.
Reason	Displays the reason for the result of the checklist item.

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