



## Planon Mobile App User Guide

**Purpose:** The purpose of this user guide is to provide tradespersons with guidance on how to use the new Planon Mobile App. The types of roles at the university who will use the app are:

- Estates and Maintenance Services teams
- Halls Porters
- Domestic Services Building Attendants
- Grounds Workers
- Transport and Logistics Operatives
- Many of our most frequently used external contractors

### Contents

Download, Log in and Screen Layout: .....	2
My Jobs .....	2
Filters and Search.....	4
Reviewing job details .....	4
Accepting/Declining a Work Order .....	5
Understanding the icons (action buttons) .....	5
Completing a Last Minute Risk Assessment/Health & Safety Check: .....	6
Working on a job.....	7
Raising a stores request .....	8
Adding Photos/Comments and sending messages .....	10
Discontinue/End Work .....	10
Raising a work request or a follow on job.....	13

## Download, Log in and Screen Layout:

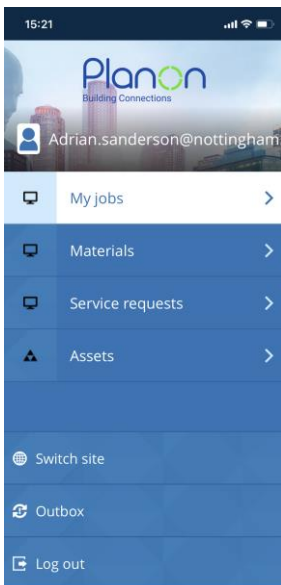
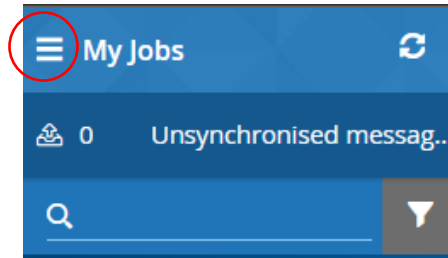
Download the Planon App Suite 2 App from either your Apple or Google Play store on your mobile device. The icon looks like this...



You will be asked to provide a URL. Enter - <https://nottinghamuni-prod.planoncloud.com/bp>

Type in your usual university credentials (ID and password) to log in.

The main features of the App can be accessed by selecting the 3 lines symbol next to “My Jobs”:



- My Jobs – all work orders that have been assigned to you.
- Materials – access to stores catalogue and track materials requests.
- Service Requests – where you can raise work requests/follow on requests.
- Assets – to access more info on the asset than what you can see within the job (only some people have this)
- Switch Site – switch to another organisation who is also using the App (not applicable to university staff).
- Outbox – messages waiting for connection to send.







## My Jobs

My Jobs is the first thing you will see when you log in each day. These are all the jobs that have been assigned to you as an individual or to a team to which you belong.

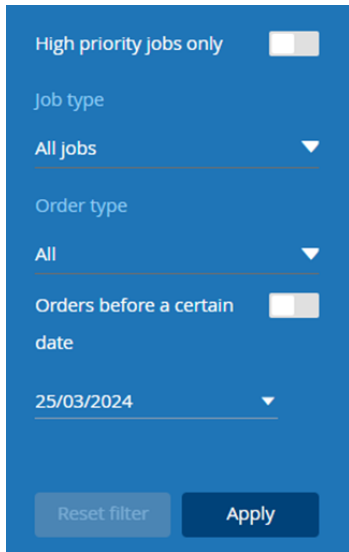
Jobs will be sorted by requested completion date-time. Then, if flagged as a high priority. Overdue orders (i.e., the start (or completion) date is in the past) will appear in their own section at the top.

Each job will show a summary of the job number, key dates, description and location. If you click into any job, you can see further details about it.

Understanding the icons:

Icon	Description	What it does
	Reactive work order	Indicates that the job is a reported failure or disruption that needs fixing.
	Planned maintenance (PPM) 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.

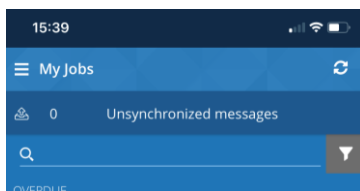
## Filters and Search



Clicking on the Filter icon will bring up...

- All high priority jobs (jobs with a 1 hour or 24 hour response time)
- Type of job - All / Personal / Team jobs
- Type of Order - either a PPM or Reactive Maintenance
- Date the job needs to be completed by

The filter is activated when you tap Apply and will stay filtered like that until you log off. However, at any point, you can reset to the original list of how the jobs have been ordered by tapping 'Reset filter'.



You can search for certain things using the Search bar. Start typing a words (or words) separated by a space. Your search is not 'case sensitive' and will ignore special characters.

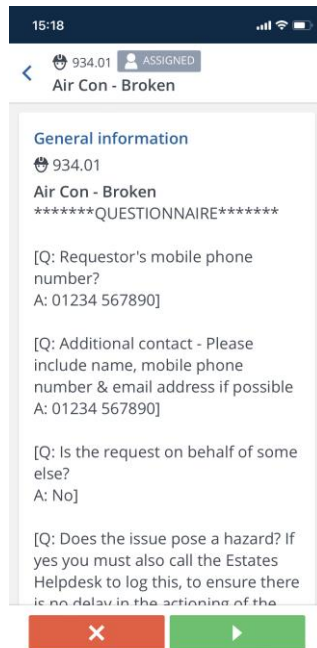
You can search by the following:

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

## Reviewing job details

When you click on any job, the details of the job will then open, with different information displayed on **cards**, you will notice some cards are white and some appear greyed out. The **white cards** can be tapped on to see more information. The **grey cards** either do not have any further details to see or can only be viewed once the job is accepted and more information is synchronized with your device.

You can see all the information gathered from the requestor in the work request within the General information card. A comment in the work order Internal Communication card will advise who has been designated as the lead on a job where there are multiple people assigned to it. You can view any photographs taken or documents attached, as well as any comments added by either the Helpdesk or the person who assigned the job to you. You will also be able to see any information included about expected time or materials ordered.



## Accepting/Declining a Work Order

To accept or reject a job, click on the job and either click on the green button to accept or the red button to reject. If you reject the job, a new window will open to allow you to provide a reason and additional comments.



## Understanding the icons (action buttons)



**Reject/ Discontinue**  
– removes it from your device and sends it back. Jobs can also be discontinued after work has begun.



**Wait** – for example, you are waiting for security to let you into a building.  
  
This **is** chargeable/ rechargeable.



**Travel** - record your travel time to and from a job or any travel whilst doing the job. This will keep running until another action is selected.



**Start work** - Tap to start the job and start the labour hours registration. Tap after pausing, travelling or waiting to restart a job.



**Pause** - a job might be paused if, for example, you are waiting for materials or going on a lunch break.  
  
This is **not** chargeable/ rechargeable.



**Temporary fix** - if you have put a temporary fix in but it needs more work to be done at a later stage.



**End work** – this finishes your work on the order and it will disappear from your job list.

## Completing a Last Minute Risk Assessment/Health & Safety Check:

A health and safety check is required when you start a job. First, click on the Start work button. Clicking the Start work button effectively “starts the clock”.



14:18 55%

Health and safety check

Last minute risk assessment

\* Is the working area safe?

Yes

No

\* Did you apply the necessary measures to secure safe working?

Yes

No

\* Do you have the required protective equipment?

Yes

No

< Reject >

There will be some questions asked that you must complete. If you answer No to any of these questions, the app will not let you progress the work further. For Go Live, we won't have asbestos information or hazards/risks in Planon yet so we will carry on with our current processes for now.

Rejecting the job sends it back to the manager and you should have a conversation with them about it. If the issue gets resolved, they can re-assign it back to you. The App does allow you to record a hazard but this is not something we want people to do at this point so please ignore this.

You will be asked to Acknowledge that you understand and will comply with the appropriate site safety guidelines.

08:32

Work

Date

12/04/2024 08:32

Work

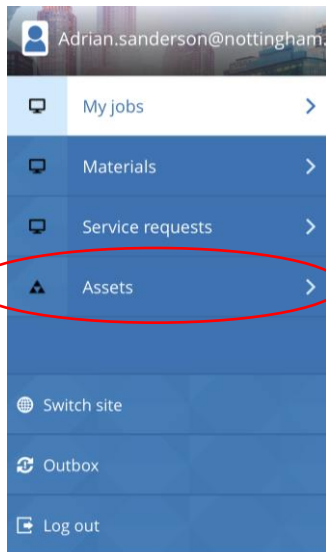
If you have successfully gone through the Health and Safety checks and are able to progress the work, clicking the Work button resumes the work. You can change the date and time of when the work starts, if needed.

As you progress the work order, you can do a number of actions within your App to do things like...

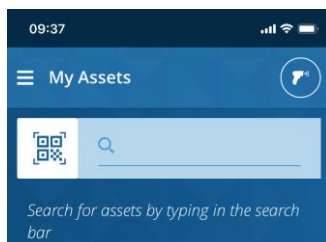
- Scan the QR code or the barcode of an asset
- Use the Communication Log to send messages to the Internal Coordinator of the job and/or Helpdesk.
- Put in a Stores item request
- Upload photos or documents relating to the job.
- Provide any commentary needed about the job.

## Working on a job

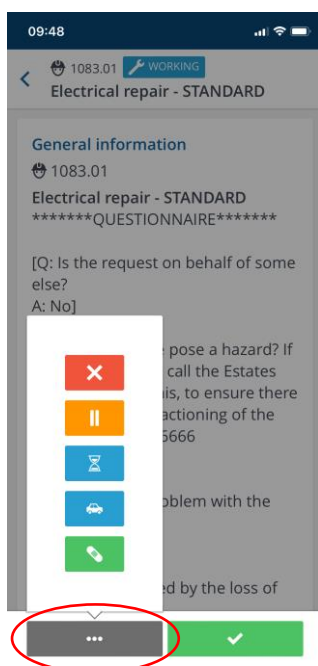
Should there be any travelling needed during, a job, click the Travel button.



If you are working on an asset and want to see more information about that asset than what is contained in the work order, click on the 3 lines to pull up your features menu and tap on My Assets.



You can either type in the name of the asset or scan the QR code or barcode to bring up the details. 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. This allows you to search for the asset on the system, review all the available information on that asset and link it to the work order you are working on. You might use this to review the asset's service history, for example.



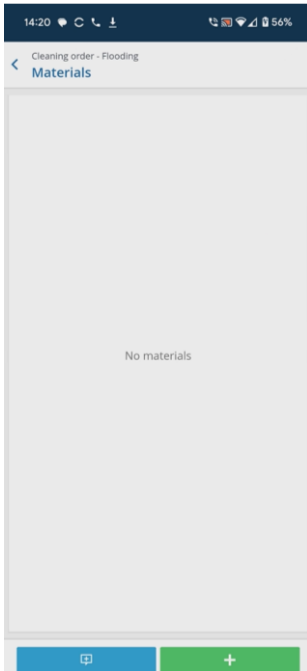
If you click on the 3 dots (circled), you can see a couple new icons.

The Pause button is for when you have started working but need to pause it and “stop the clock”. For example, for a lunch break or because you need to put in a request for materials with Stores. You will be prompted to do a H&S check again when you re-start work.

Temporary fix – this one means you have temporarily fixed the job but it needs more work before you can technically complete the job at a later stage. The work order will go back to the system to be re-assigned. (\*NB: This one is only visible if you are assigned as the ‘key assignee’ on a job)

Remember, the green tick button is what you press when you have completed the job and want to End work.

## Raising a stores request



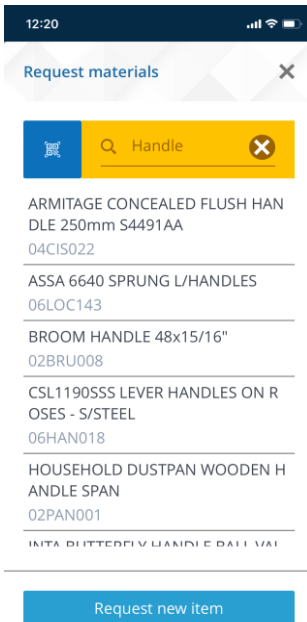
You should put in your request for a Stores item within the job itself.

Click on the Add Materials card.

Use the Search bar to find what you're looking for.

Select the item and confirm the quantity needed.

Remember, Pause "stops the clock" so the question is whether the item is on site and in stock or not. If it is, you can tap "Wait" (keeps the clock running) while you go to collect it. If it will take a while before the item is available, you need to put the job on Pause.

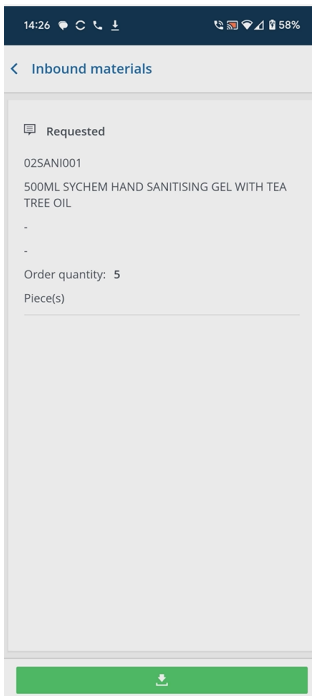


Use the Search bar to find what you're looking for. Select the item.

Confirm the quantity needed and click Add. You can then come back out of the Materials card.

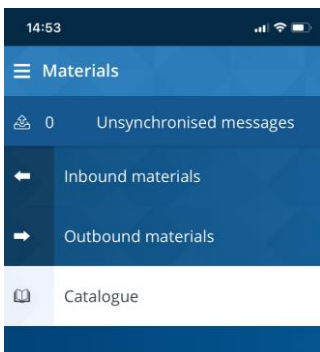
Remember, Pause "stops the clock" so the question is whether the item is on site and in stock or not. If it is, you can tap "Wait" (keeps the clock running) while you go to collect it. If it will take a while before the item is available, you need to put the job on Pause.



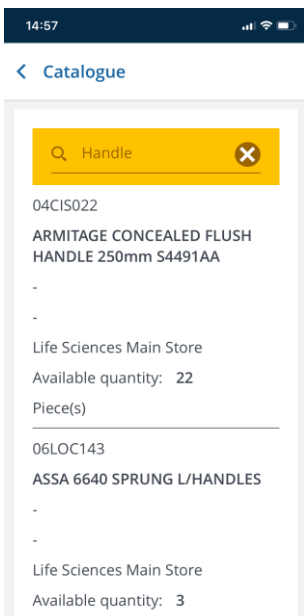


You can check the status of items you have ordered by clicking into the 3 lines to bring up your features menu, then Materials – Inbound materials.

You will see your materials request in here.



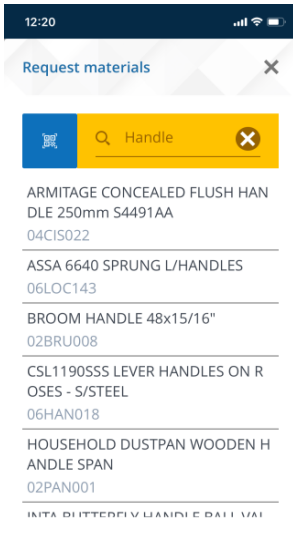
You can browse Stores items in the Catalogue, if needed. You can find the Catalogue by clicking on the 3 lines and then Materials.



The Catalogue is a read-only part within the App but should help you find the items you're looking for. You can see the name, product code and quantity available on site.

Once you have found what you're looking for, go back into your work order and raise the stores request there.

You will now see the Requested and Assigned stock items within the Materials card in the job.

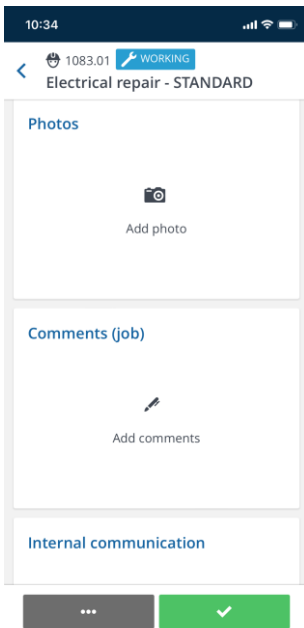


If the item you're looking for is not available on site or is a "non-stock" item, click on Request new item.

Complete the details in the form and click on Save. This sends the request to the stores team and they will purchase the required item.

At this point, you will need to tap the Pause button to "stop the clock" on this particular job until the materials have been purchased and can be collected.

## Adding Photos/Comments and sending messages



Photos and comments should be added to the job whilst you are working on it. This is mandatory so that the Internal Coordinator and/or Helpdesk can check the work before marking it as "administratively completed". You cannot end the job and add them in later because the job will have disappeared from your Job List. Just click into the cards to upload your picture(s) and complete the requested information.

Think of the Comments card as the place where you would make some notes about the work you have done.

There is also an option to have a messaging / chat type service with the back office whilst working on a job. You do this through the Internal

## Discontinue/End Work

A work order can be Discontinued by tapping the following icon:



15:16

Discontinue

Date  
08/05/2024 15:16

Reason

Comments

Discontinue

Provide a reason and further comments. This sends it back to the Helpdesk/Internal Coordinator to be re-assigned.

To End work, select the following icon:



08:33

End work

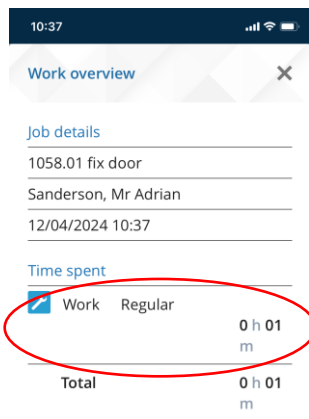
Date  
12/04/2024 08:33

End work

When the work is finished, click End Work. You can change the time and date here, if needed.

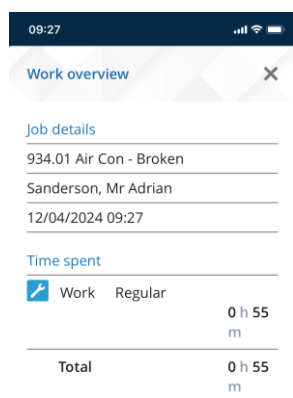
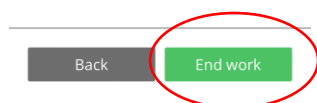
Remember, you should have added in a photo of the completed work and some commentary about the work that has been done before you click End work.





The next screen you see is where you should confirm the actual hours you have spent on the job. It's important that you update this to accurately reflect the time take on the job because this impacts on the re-charging process and ensures the department who has paid for the work to be done is charged the correct amount for your time.

Click on End work to confirm you have finished your work on this job.

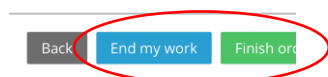


This screen is what you might see if there is a job with multiple people working on it and you are the 'key assignee' (or the lead) on the job. First, confirm the actual hours you have spent on the job.

Select End my work if the order cannot be completed yet, because there still is unfinished work to do. Here there are two possible scenarios:

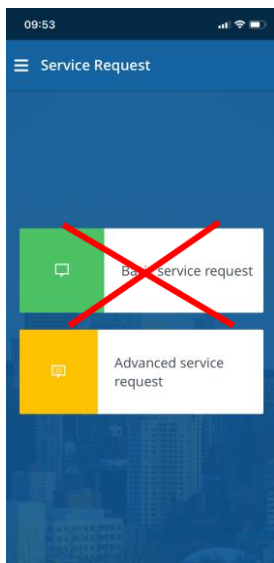
1. There are other work assignments related to the order, which are not finished yet. In the system, the order will remain as "In progress".
2. No other work assignments are planned or in progress. In the system, the order will be set to "On hold" and the order might be reassigned, either to yourself or to someone else to complete.

If all the work is done and the order can be completed, select Finish order. In the system, the order will be set to "technically completed". At this point, someone will review all the information related to the job and confirm it as "administratively completed".



To Note: Planned Preventative work orders work in a similar way to reactive maintenance work orders. There will be some checks to do and you need to answer the prompts as you progress the activity. If any of the mandatory questions fail their inspection, the system will automatically generate a remedial work order.

## Raising a work request or a follow on job



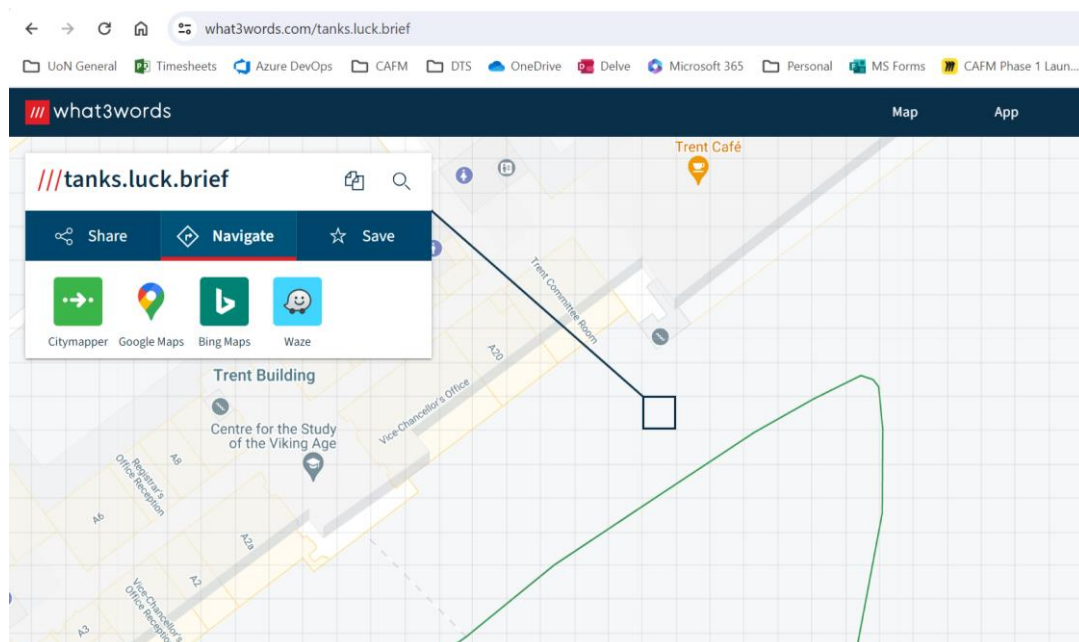
When working on a job, you may find a related issue for which you need to create a follow on work request. Or you may see an unrelated issue that needs fixing and need to report it. In either case, click on the 3 lines in your features menu and select Service requests.

Here you will see 2 buttons. The Basic service request is disabled (but we are unable to remove it).

The Advanced service request is to be used for raising any kind of service request with the Estates Helpdesk. The service request takes you to the General Repair service request form that all staff have access to in order to raise requests with the Estates Helpdesk.

In this form is an option to raise the request as a follow on order, which you should select if it's related to the job you've been working on.

Some service requests you want to raise may be linked to outside or roof spaces. For these types of requests, you will need to use What3words to pinpoint exactly where the problem is. If you click on Outside Spaces in the service request form, it will have a link to the website, simply type in the nearest building name and search for it, then click on the map to pinpoint the exact location of the issue. Finally, copy the browser link into your service request or type in the full URL. This will show the tradesperson assigned to fix it exactly where the issue is.



If you have any further questions on using the App, please contact your Superuser.