University of Nottingham
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User Guide for Tier 1 and 2 Contractor Admin Teams (Back-office)

Purpose: The purpose of this user guide is to provide some guidance around how to use Planon for accepting work orders from the University of Nottingham and assigning them to your operatives.

Contents

Accessing Planon and the Homepage:

If you have an Associate account set up with the university, access the system using the link below and your university credentials (full email address and password).

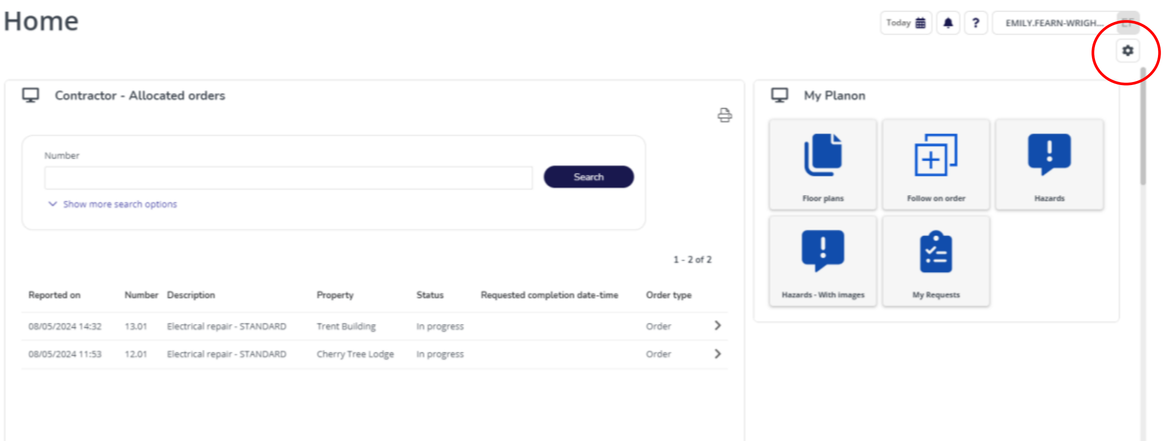
https://nottinghamuni-prod.planoncloud.com/

If you do not have an associate account, click the link below.

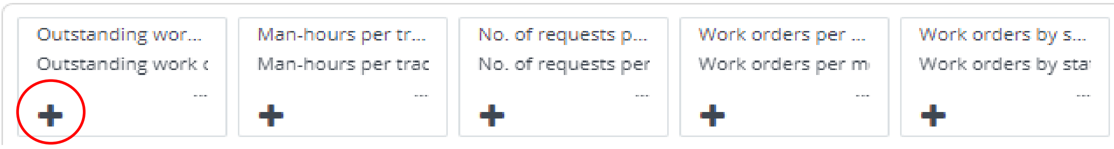
https://nottinghamuni-prod.planoncloud.com/?kc_idp_hint=nosaml

Enter your company email address and temporary password Welcome!23. You will be prompted to change your password and set up authenticator.

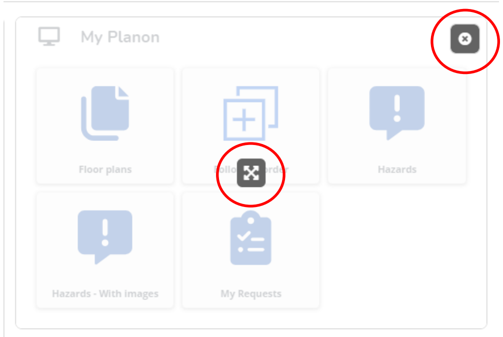
To customise your Homepage, click on the Cog icon in the top right of your screen. This puts your Homepage in Edit mode.



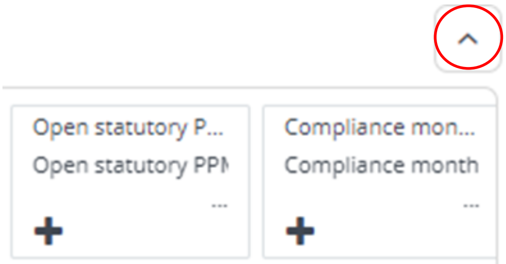
The library that you can see at the top displays all available gadgets. Click on the plus symbol to add them to your Homepage. *NB: You may not have anything in there to add.



You can remove gadgets from your home screen by clicking on the cross in the top right. This puts it back in the library (don't worry, you can always re-add it later if needed). You can also move gadgets to where you want them to appear on your Homepage, by clicking and dragging the 4-arrowed cursor icon to where you want the gadget to go.



When you are finished editing your Homepage, click on the Up arrow, to come out of editing mode.

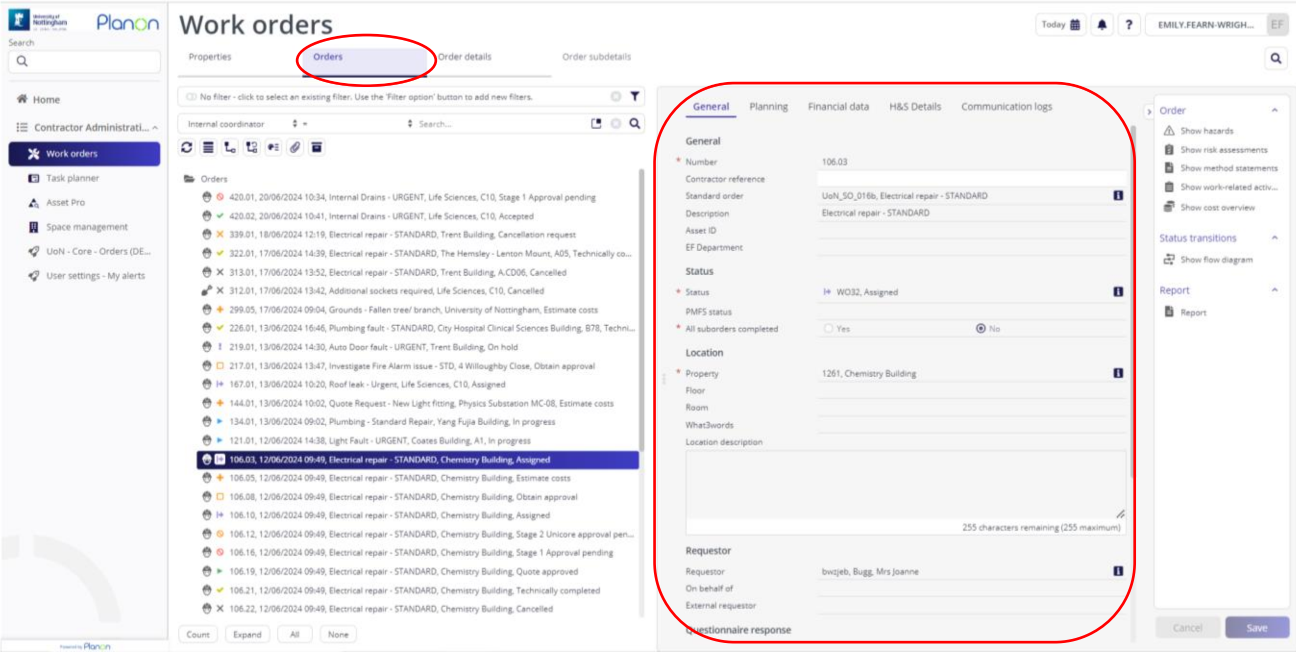


Understanding the Work Orders TSI

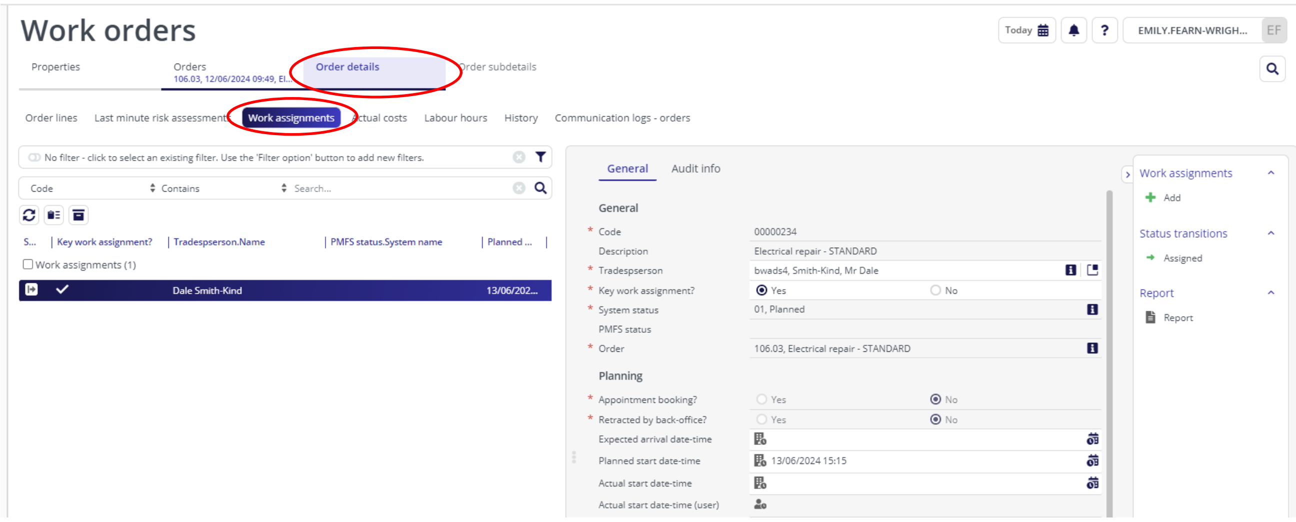
There are 4 types of work orders in Planon:

- **Statutory PPM –** Legally required, e.g. fire alarm testing
- **PPM –** Non-statutory but important preventative maintenance e.g. check the filters on an air handling unit
- **Service order –** reactive maintenance task e.g. something broke!
- **Minor works order –** modification or alteration to an existing space or service e.g. room set up after 6pm, new socket, putting a shelf up

The Work Orders TSI (Task Specific Interface) is where we process and hold all the information about work orders. You can review the full details of the work order that has been allocated to you here. If you click on any of them, it will show you the relevant information in your Data Panel next to it.



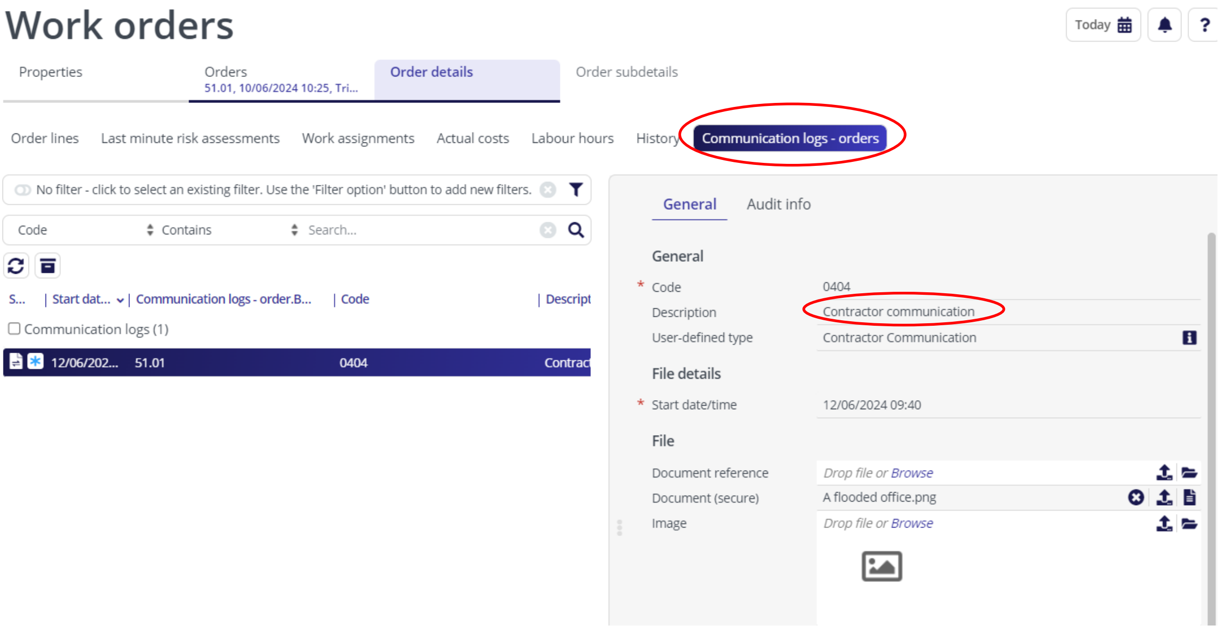
Clicking into Order details allows you to see more detailed information. In this example, we have clicked on Work assignments to see who the job has been assigned to, but you can also view any materials/plant hires in Order lines, view Labour hours used, any Communications logged against that work order etc when here in Order details.



Any communications linked to a specific order can be found in the Order details (Work Order TSI). There are a number of channels that have been set up for different types of communications.

The **Communication log** is a collated log of all the different channels, messages, notes, App status's, etc about a work order. You can see these in the Data Panel or you can click into each one individually in the Elements Panel. It can be viewed by:

- The Internal Coordinator
- The Helpdesk
- Anyone with access to the Work Orders TSI
- Anyone – (under the Access to Information Act)



Contractor communications is used for messages between the Helpdesk, Internal Coordinator, engineers / surveyors and the external contractors working on the work order. It is here that you can request to cancel a work order, for example. It can be viewed by:

- The Internal Coordinator
- The Helpdesk
- Contractor admin teams
- Anyone with access to the Work Orders TSI
- Anyone – (under the Access to Information Act)

This channel is not visible to people on the mobile App.

App communications is used for messages between the Helpdesk, engineers / surveyors and the tradesperson(s) working on the work order. This is also where you can review the comments about the work completed by the tradesperson or external contractors. It can be viewed by:

- The Internal Coordinator
- The Helpdesk
- Contractor admin teams
- Contractors using the PMFS mobile App
- Anyone with access to the Work Orders TSI
- Anyone – (under the Access to Information Act)

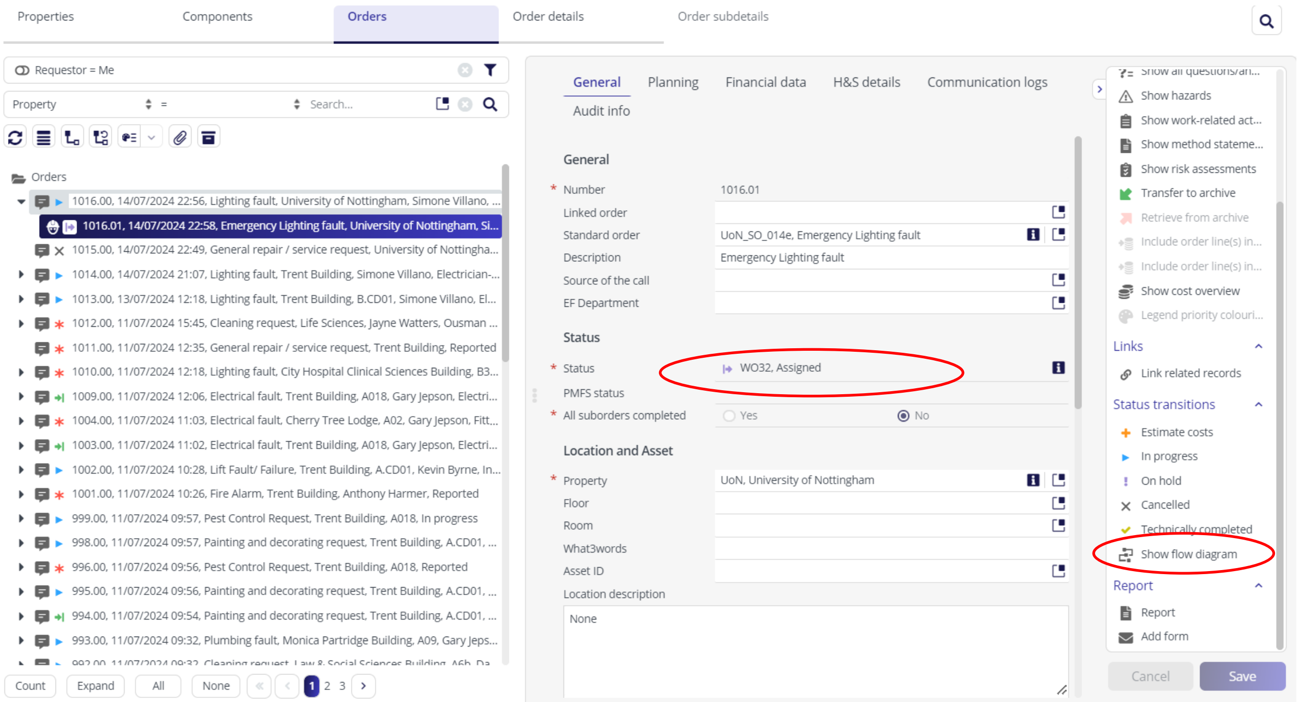
Understanding Workflows and Status Transitions

When a work request comes in, it has a status of “reported”. The Helpdesk will review/triage the request and either accept or decline in the first instance. Planon will automatically generate the work orders. All work orders raised will have a named Internal Coordinator (e.g. a Campus Service Manager), usually designated by the system based on the properties they are responsible for, or the type of work. All work orders will have been assigned to you by an Internal Coordinator.

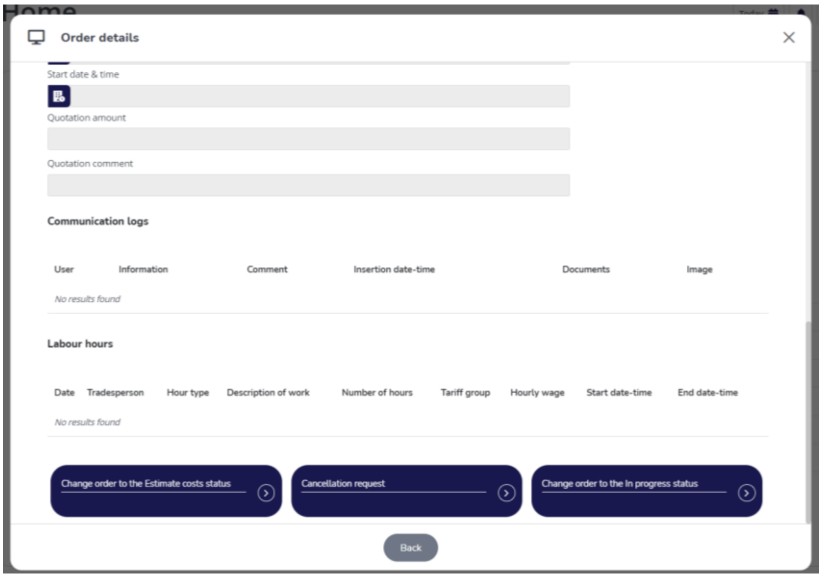
There are a number of transition statuses involved in a **work order's** workflow than a work request workflow. The usual route will be:

- **Reported** – a work request has been raised with the Helpdesk
- **Accepted** – the request has been triaged by the Helpdesk and accepted, automatically generating work orders. Where there is a named contractor on the work order, they will see the order at this stage.
- **Estimate Costs** – a work order has been sent to you with a request to submit a quote
- **Quote approved** – your quote has been approved and you may assign the work to one of your operatives. At this point, you can change the status to **Assigned**
- **In progress** – a work order is underway/ being worked on
- **Technically completed** – a work order has been reported by your tradesperson as completed
- **Operationally completed** – the work has been reviewed by the Contractor admin team and reported as being accurate (hours, materials, quality)
- **Administratively completed** – by Internal Coordinators (and Helpdesk team, by exception), accepting the costs of the work order and sent through for payment
- **Financially completed** – any invoices have been fully paid (or work re-charged) and therefore the work request/ work order(s) can be archived either manually or automatically done after 90 days (*NB: in the near future, this will be automatically done via the integration with UniCore)

You can view where the work order is in the workflow process at any point by looking at the Status in the Data Panel or by clicking on "Show flow diagram" in the Actions Menu.



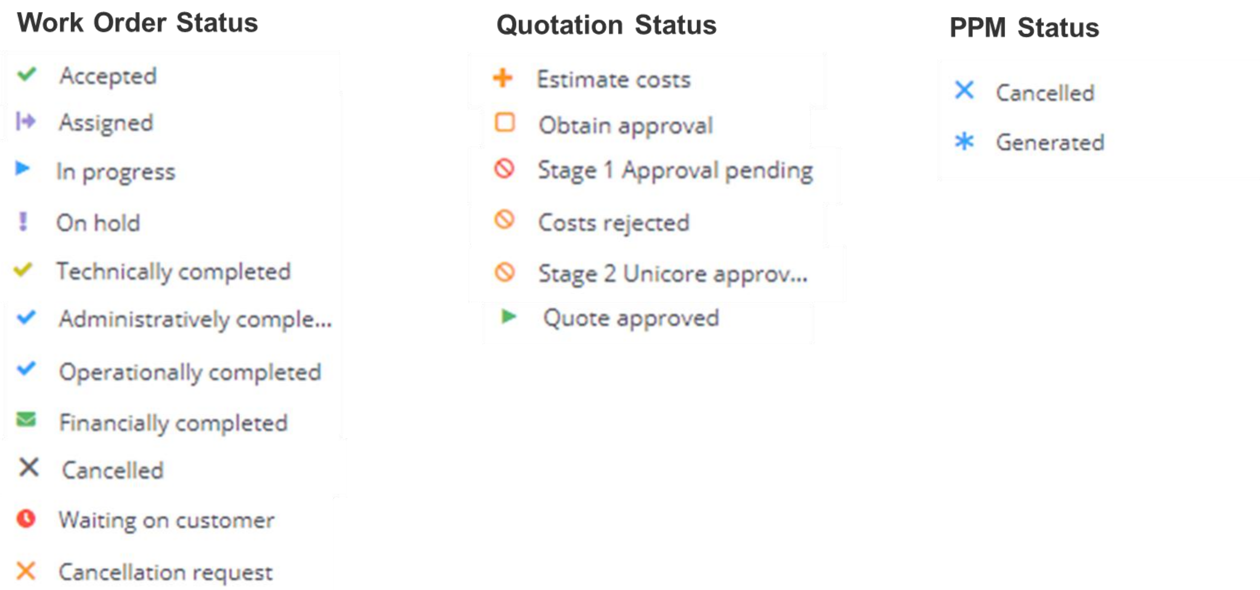
Requestors can ask for a cancellation to the work request they have raised. You can also request to cancel the order allocated to you via your **Contractor – Allocated orders** gadget on the Homepage.



This doesn't cancel the order itself but sends it back to the Helpdesk to re-allocate to another contractor. The Helpdesk can cancel requests and any associated work orders, if needed. They will populate the cancellation reason field and add comments to the cancellation reason.

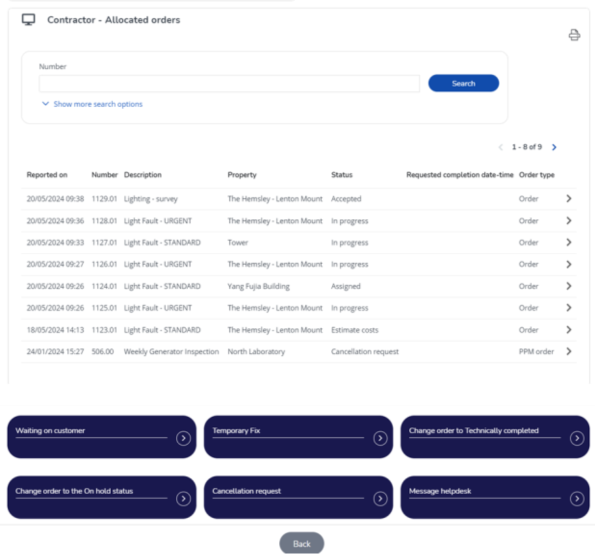
They can also put a work order on hold, for example, a more urgent request has come in that needs to be dealt with first.

There are some icons to make it easier for you to understand at which point work orders are in a workflow. You'll usually see these next to the work order.



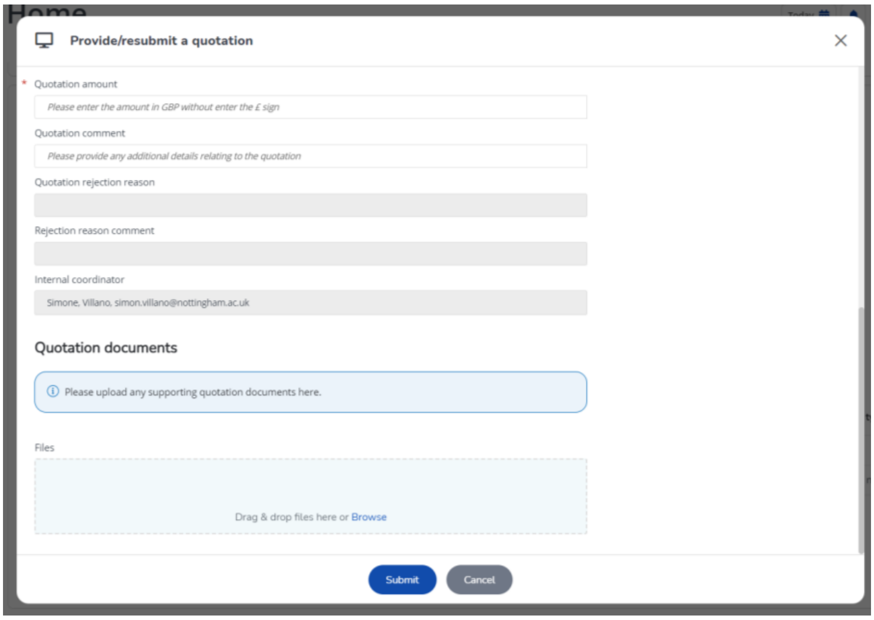
Receiving work orders and providing a quote

Contractor - Allocated orders - all the jobs we've assigned to you are listed here, at any status up until "Operationally completed". From here you can change the status of the order. For example, you can request a cancellation if you cannot accept the job. You can also message the Helpdesk with any queries about the work orders.



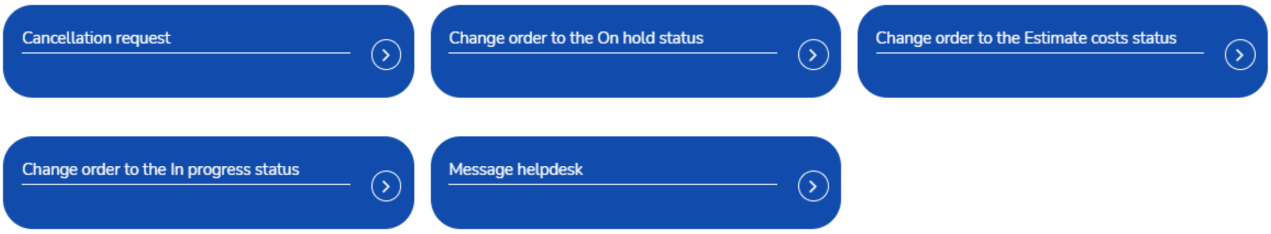
*NB: If a work order is within the quotation process, it won't show here. It will show in your **Contractor quotations** gadget up until it is Quote approved.

For any orders expected to go over £500, we will need to request a quote from you. Please ensure you include all labour hours. You will see the order allocated to you showing a status of "Estimate costs". The **Contractor quotations** gadget on your Homepage is where you can submit your quote. Please note, you cannot submit a quote without uploading a document. When we request a quote at the Estimate Costs status, this is your best estimate of how much the job will cost. The work order is received on our side at the status of "Obtain approval".



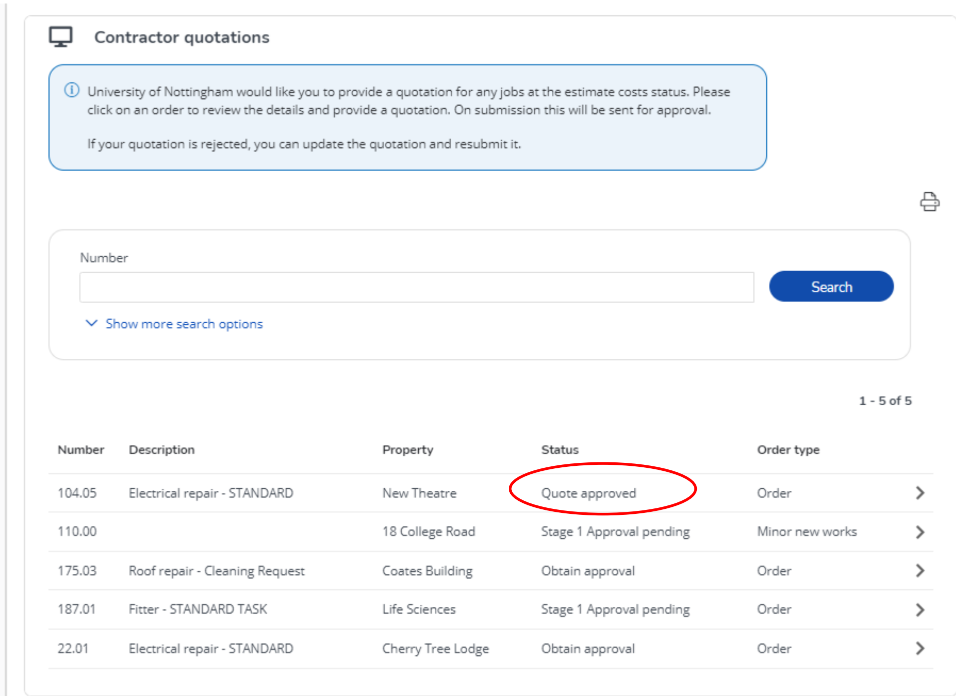
If the final costs go over the quotation amount, you will need to submit a new quote for the extra amount. If the final costs go under the quotation amount, you can update the costs in the Allocated orders gadget. You will see a button there called “Amended quote amount” and can edit it there.

If a work order has been allocated to you without a quotation request, the limit of the work order is £500. If you expect it to be more than that, you can change the status to Estimate Costs and provide a quote for the full costs and materials required to complete the job. This will then go into our financial approval process.



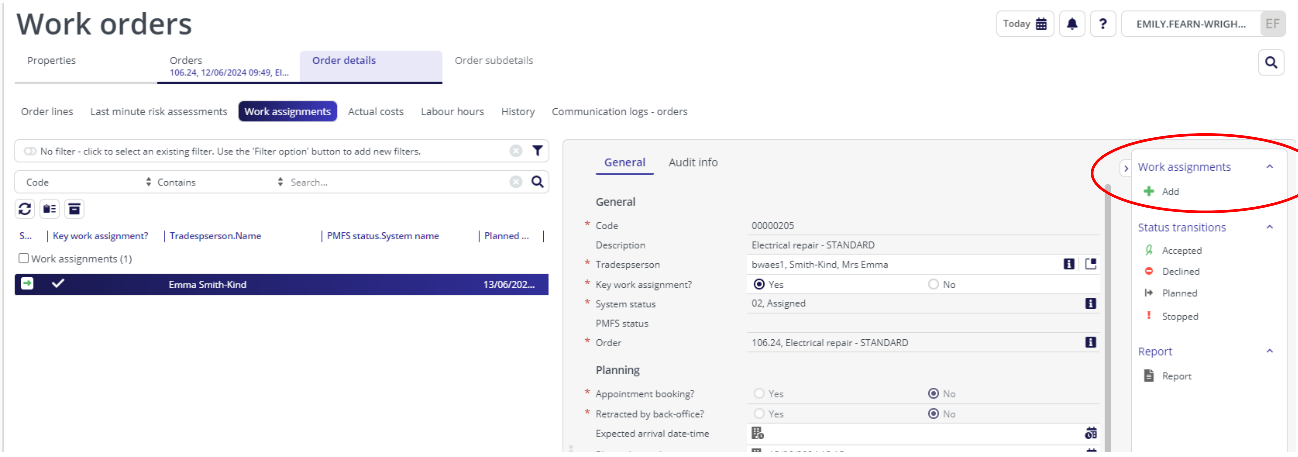
If you have already started working on a job, (the work order status is In Progress) and the costs are then expected to go over £500, you should request a follow on work order.

You will be able to see in your **Contractor quotations** gadget all the stages that a work order is at within our financial approvals process. Only when the work order status is showing as “Quote approved” can you assign that job to your operatives. First click into the order and change the status of the work order to Assigned. This will move the order back into your **Contractor - Allocated Orders** gadget.



Assigning a work order

The Assigned status shows that a Work order has been assigned to an (internal) **Tradesperson** or a **Supplier/Contractor**. You can assign a work order to someone from **Work Orders module – Orders – Order details – Work assignments.** In your Actions Menu, click on Add to add a work assignment and select the person you want to assign it to in the Data Panel. Then add in the Planned start/Finish date/time. To send it to that person's job list in the mobile app, in Status Transitions (Actions Menu), click on Assigned and Save. The tradesperson will then receive that work order in their job list on the mobile App. If you do not change the status to "Assigned", they will not receive the work order.



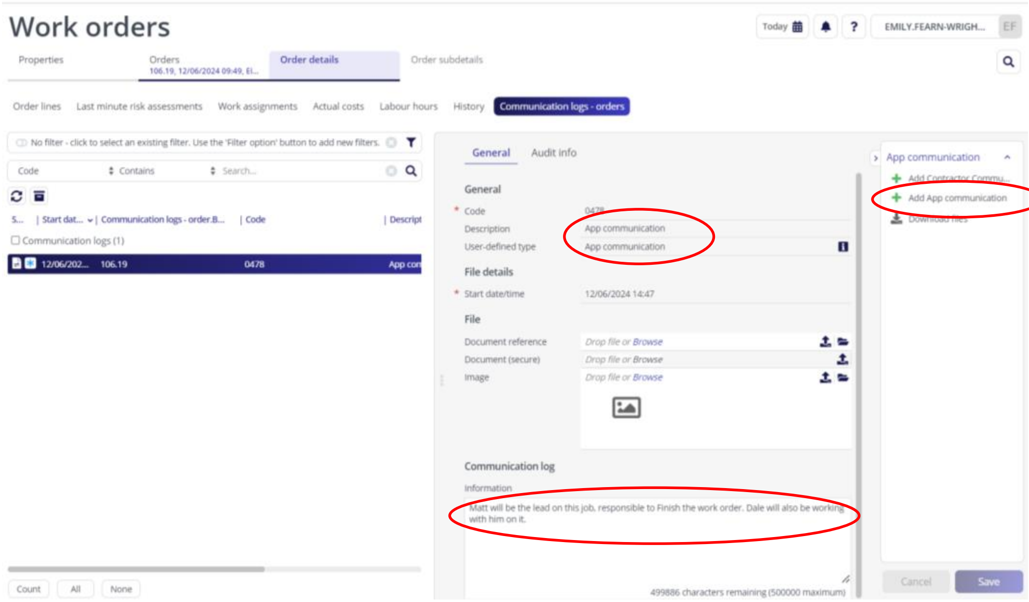
Assigning a work order to multiple people

It's important that when you assign a work order to multiple people that you make one of them the "lead" on the job or the "key assignee". This means they are the person who can change the status of a work order to "technically completed".

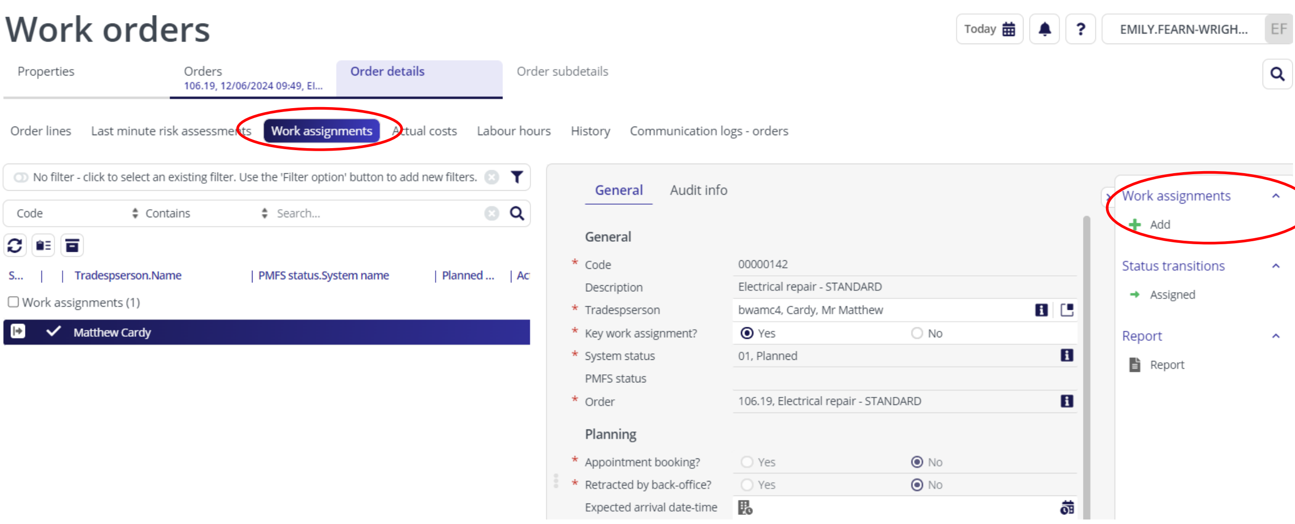
- **Key assignment** means the person in charge (overall responsibility) of the work order.
- If there are multiple assignees for a particular work order, the Key Assignee will have the option to 'Finish Order'. All others will have the option to 'End Work'.
- The Key Assignee is the only person that can 'Finish' a work order. This changes the work order status to 'Technically Completed'.
- If the Key assignee selects the 'Finish Work' option, this closes the work order for all other assignees.
- All other assignees will have the option to 'End Work'. This ends their work element but does not change the work order status.
- The Key Assignee can select the 'End My Work' option, which completes their work element but leaves the work order open. **At this point the Key Assignee status can be changed by a team leader to a different assignee whose work is not completed.

*NB: You can only make someone a Key assignee if the work assignment is in a **Planned** or **Assigned** status, whether you are doing this from the Work Orders TSI or the Task Planner. The Key work assignment action becomes read-only if the work assignment is not in the Planned or Assigned status.

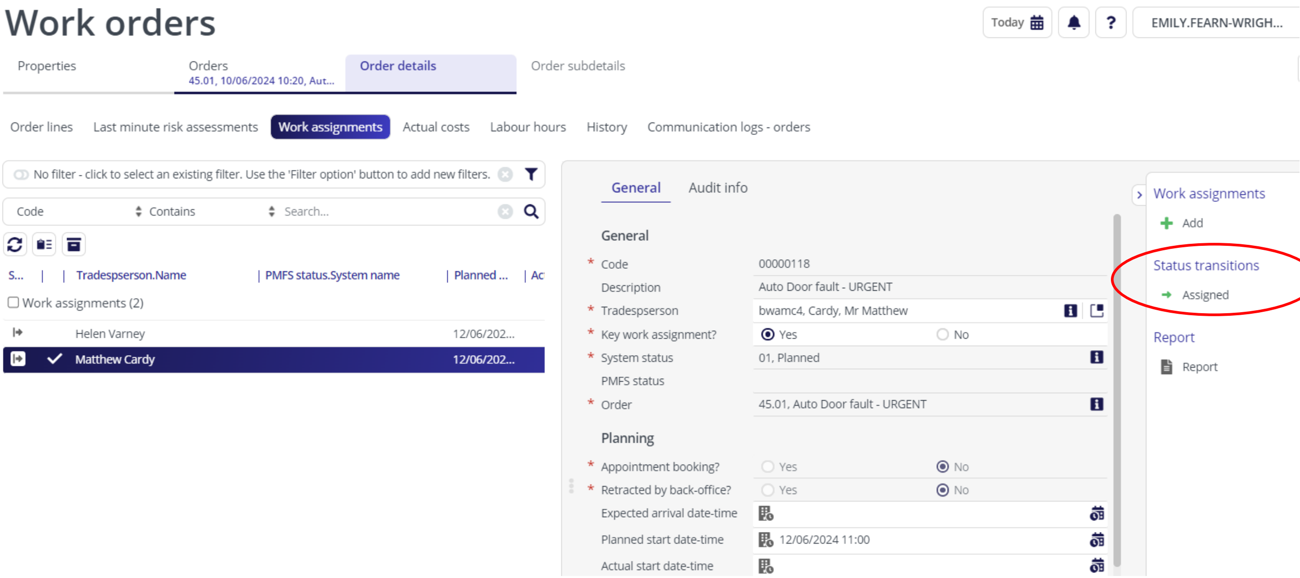
There isn't a way to see who the 'Key assignee' is on the mobile App, so in Communication logs – orders, you can Add an **App communication** and put the info in there. This will then show on their Internal Communication card in the work order.



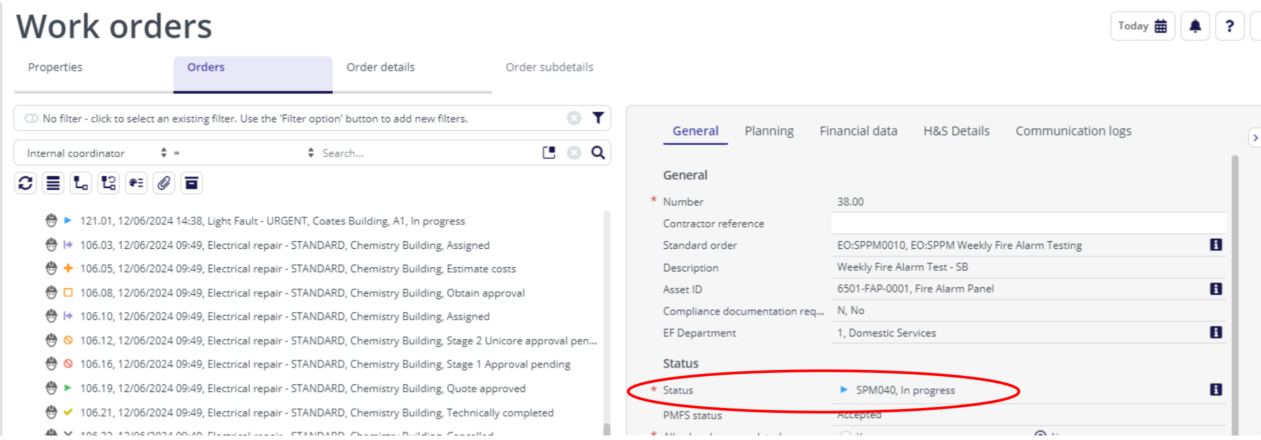
To add more people to the job, go to Work assignments. In your Actions Menu, click on 'Add' to add multiple people to that work assignment. The first person you add is system designated as the Key work assignment and additional people are not – but you can change this here, if you need to. If you add in Planned start/finish dates/times, they will be able to see this on their job list via the mobile App.



The final step is to change the status to Assigned. This pushes the work order out to their job list in the mobile App. You need to click on each person you've added the work assignment to in the Elements Panel and click Assigned so that they all receive the job.

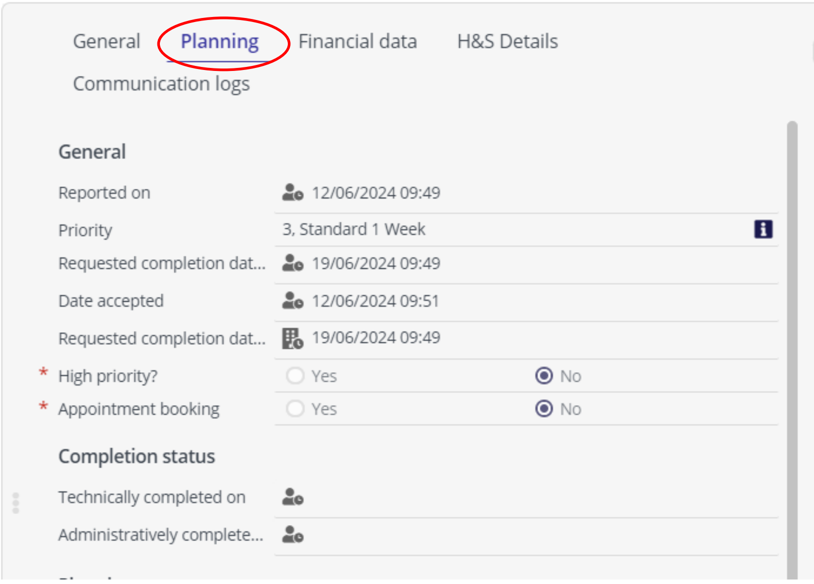


When the tradesperson “starts work”, this changes the status of the work order to “In Progress”. When they confirm that their work is completed (via the App), this changes the status to “Technically completed”.

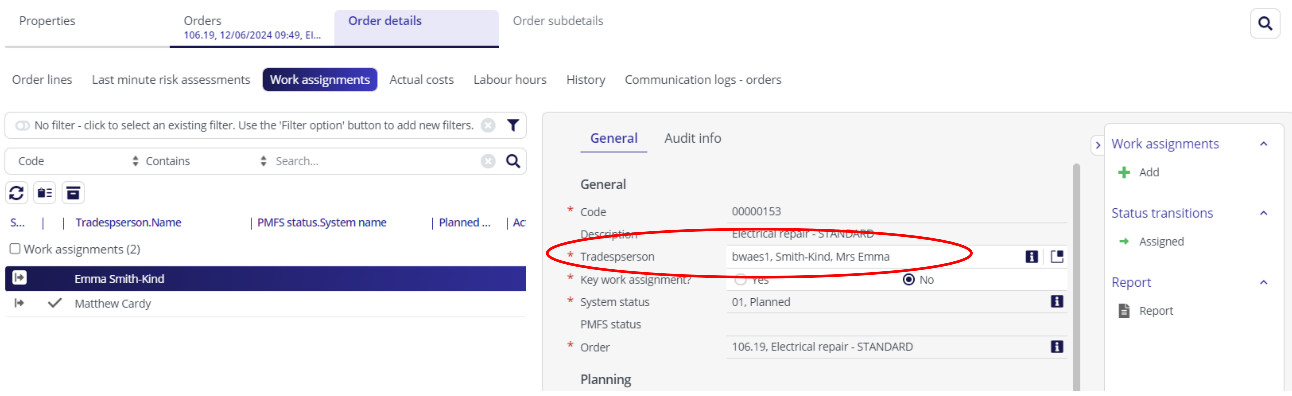


You can view their **PMFS mobile App status** by clicking into Order details – Work assignments. For example, if a job has been Accepted / Declined, or they are Travelling, Working, Waiting, Paused, Temporary Fixed, Stopped, etc.

There may be some work orders that have been marked as a high priority so that those using the mobile App can see they need to complete these first. Appointment bookings may be required for activities such as access to tenanted properties or where there is restricted access and specific arrangements have been made. You will also be able to see this from the Planning tab in the Data Panel. If either (or both) of these are toggled to Yes, this will be visible to those using the App.



If you have assigned a job to the wrong person by mistake, click into Order details – Work assignments, select the person from the Elements panel, then in your Data Panel, change the operative's name here. This removes it from the previous person's job list and when you click Assigned, the new person receives it in their job list.

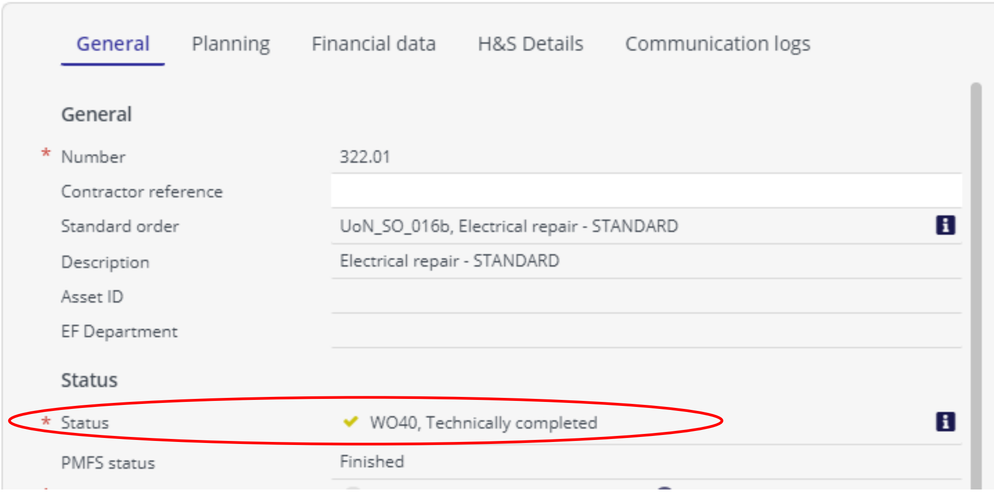


Reviewing completed work

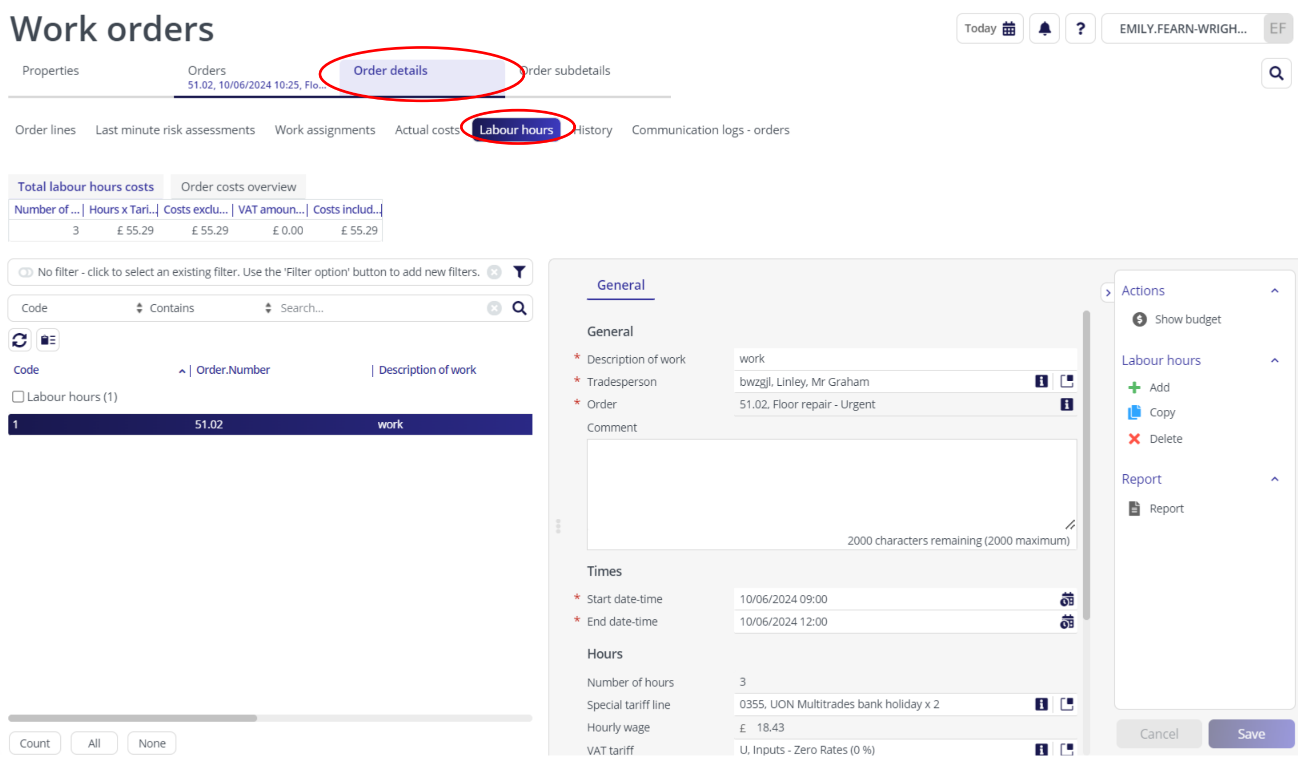
When the tradesperson has confirmed their work is "technically completed", you will see that status either in the Data Panel (when in Work Orders TSI) or in your **Allocated orders** gadget. You will need to review the work and check that they have:

1. Submitted the correct number of labour hours (and any materials used/stores requisitions/plant hire for some contractors)
2. Submitted a photo and any required documentation
3. Provided commentary about the work they've completed.

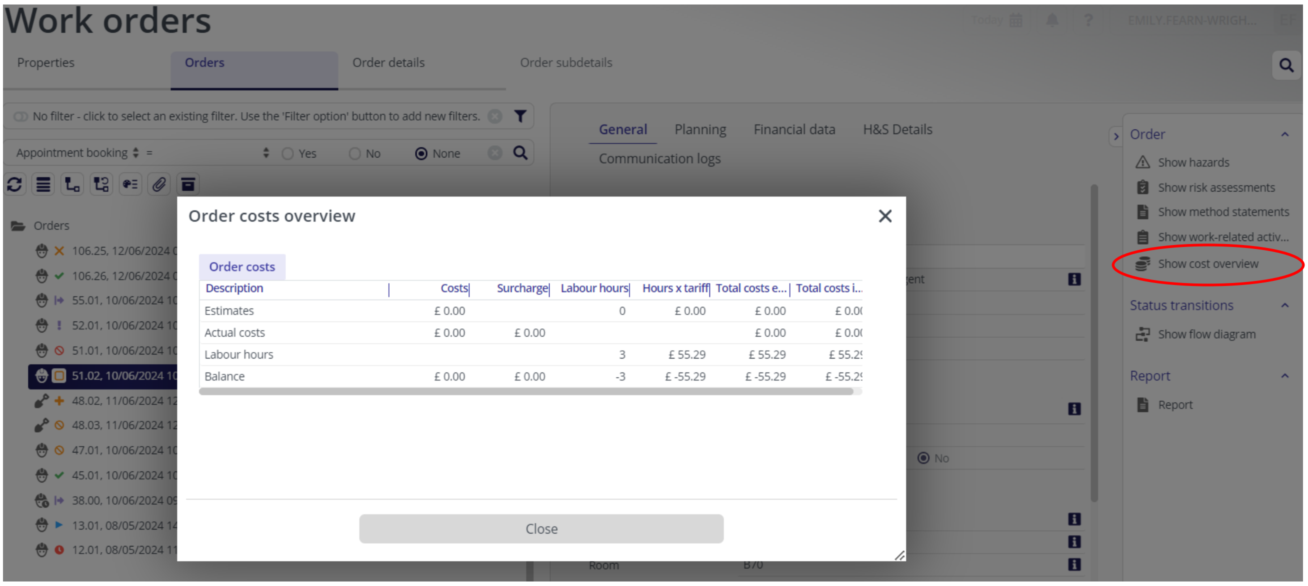
You can do some of this in the Data Panel when you have the work order selected – look through the different tabs to see which fields are editable.



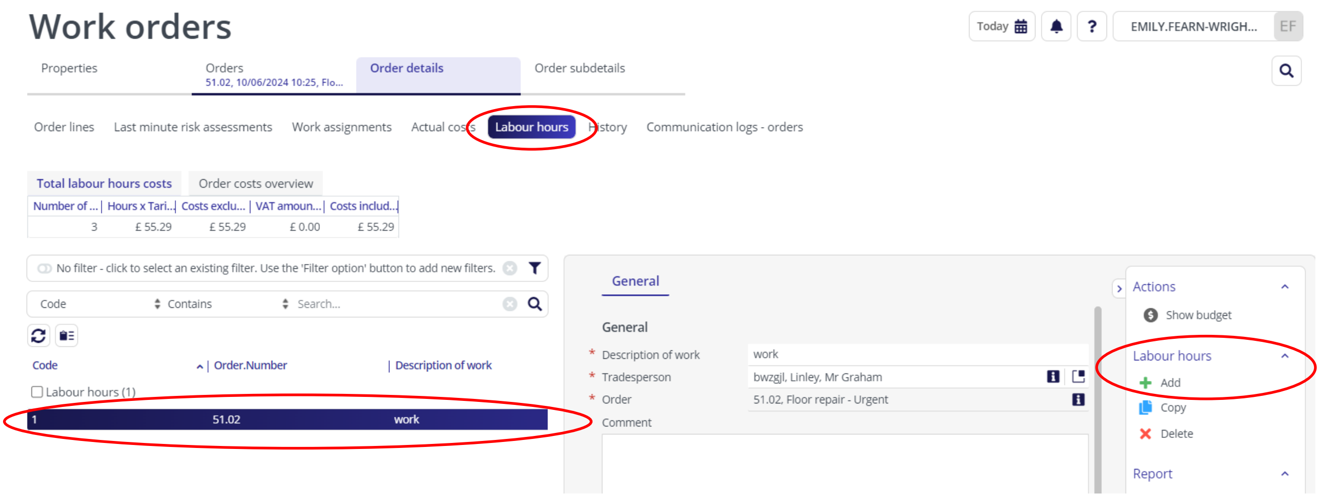
However, you can review the full detail by clicking into Order details. You can review materials used/plant hire in Order lines. The Communications logs – orders is where you would see the photo of completed work, plus any commentary provided by the Tradesperson. Here you can also review Labour hours.



You will need to confirm/amend how many labour hours were used against a work order. Labour hours are normally calculated automatically for mobile App users but you may need to amend them, for example, if a tradesperson has forgotten to “start work” or forgotten to log out or forgotten to confirm their hours. When in the Work order TSI, you can view the hours and costs submitted against that work order by your operative in your Actions Menu panel.

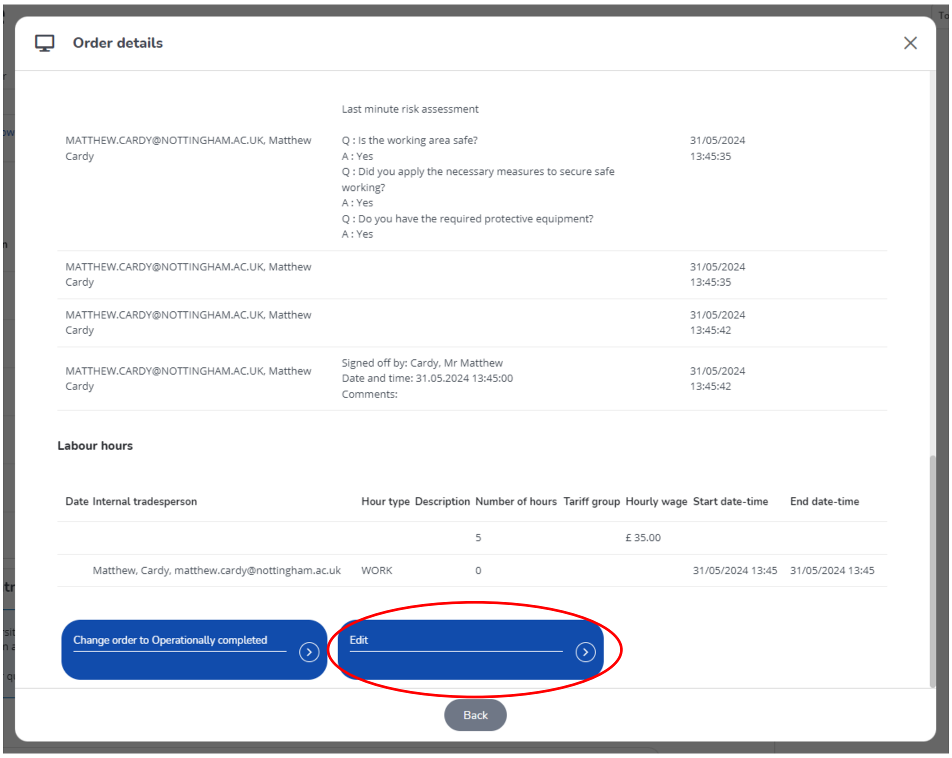


You can also drill down further by clicking into Order details – Labour hours. If your operative has logged their hours on their mobile App, you'll see it here and can amend it by selecting it and amending it in the Data Panel, if needed. If they haven't logged their hours, you can add Labour hours from the Actions Menu.

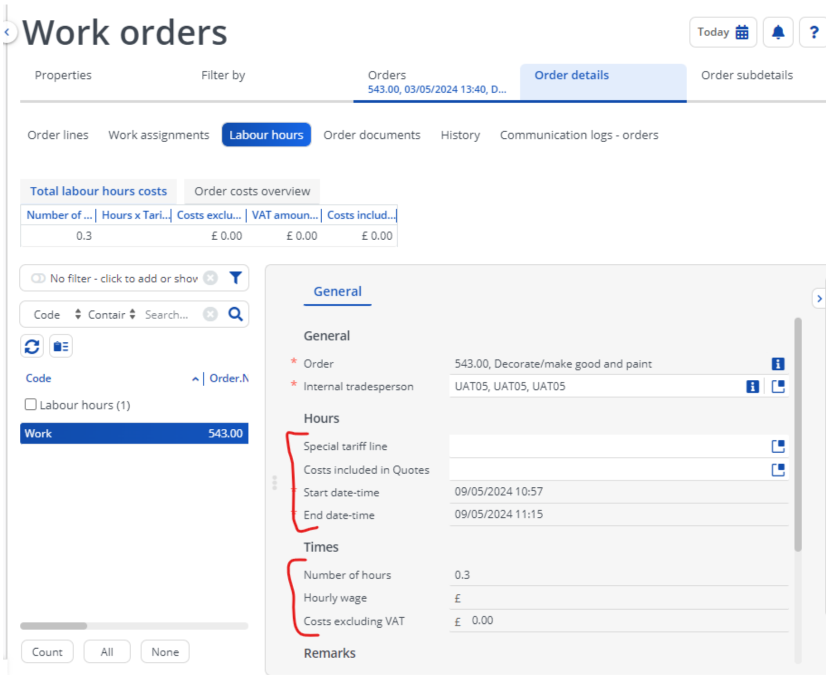


You can also do this from your **Contractor – Allocated orders** gadget on the Homepage.

By clicking into the order, you can review what has been recorded about the labour hours used on the job. You can also view the Communications Log, which includes any commentary provided by your operative, as well as any photos they've taken of the work. You can edit the form, if needed, and/or message the Helpdesk from here.

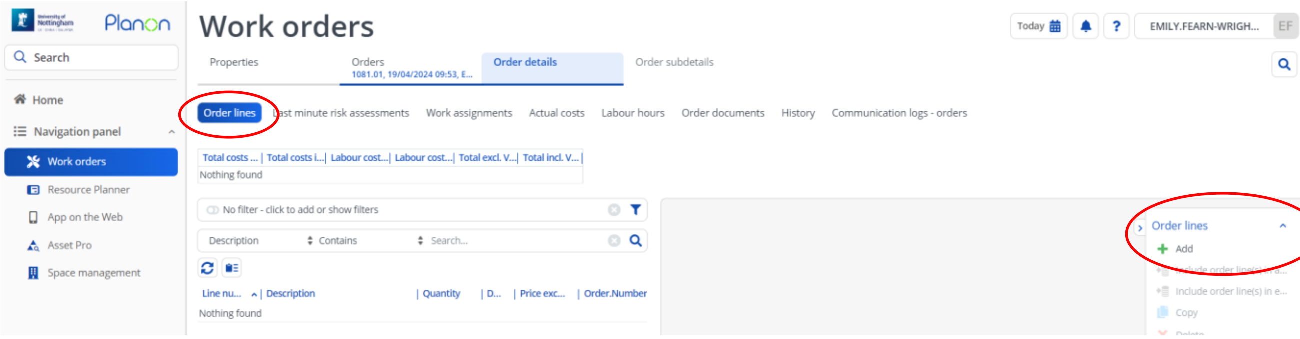


If you have provided a quote that includes labour hours and your operatives are also using the mobile App to log their hours, this could lead to double-counting of hours/costs. The way to avoid this is to go into Work Orders – Order details – Labour hours. Enter “Yes” in the field which states “Costs included in quotes” and then set the “Costs excluding VAT” field to 0 (as shown below) before “Operationally completing” the work order.

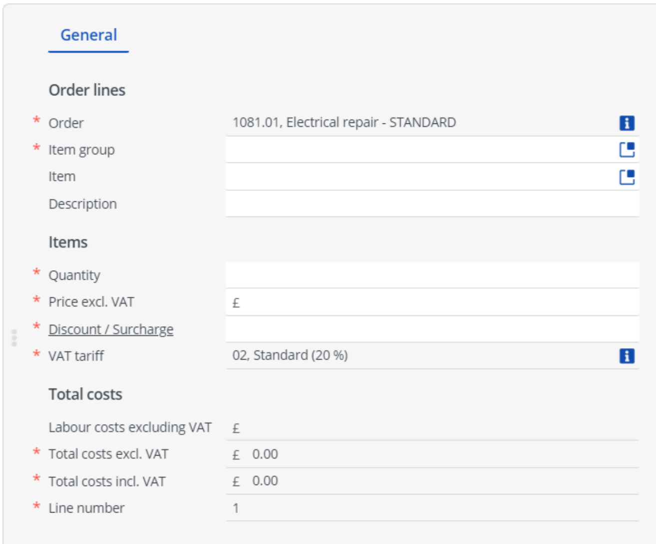


Charging for hire, materials, ad hoc costs

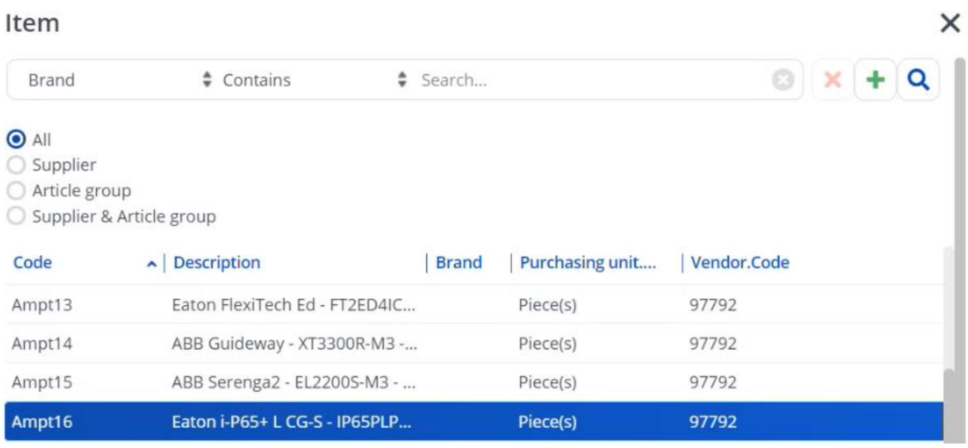
To charge for any agreed extra costs, such as plant hire, materials or other ad hoc costs, from the Work Order TSI, select the work order, then click on Order details – Order Lines. In your Actions Menu, click on Add.



In the Data panel, you can see where you can add the information about the extra costs.



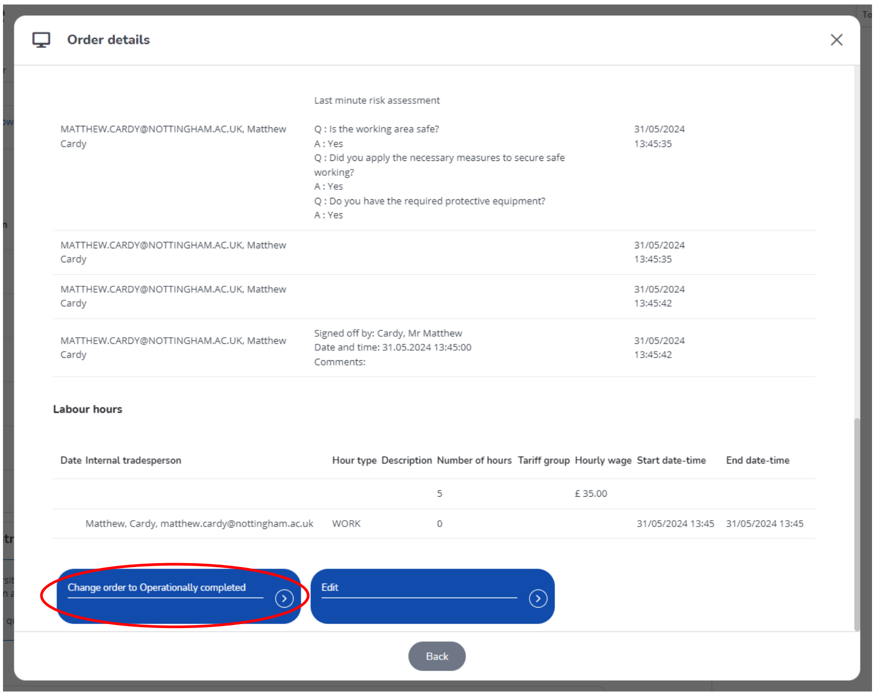
Under the Item group field, click on the square symbol which brings up a list you can select from. These are materials where we have an agreed price.



Complete the rest of the mandatory fields, marked with a red asterix. You may also want to put some information or an explanation about the request in the Description field. Once this is done click Save to submit. If you have used materials that are not on the agreed list, you will need to add them with sufficient descriptions to understand what has been used. This may be done over a few Order lines, if needed. *NB: Tier 2 contractors do not have agreed materials. However, Item Group field is a mandatory field to complete, so just select your company name in there.

After having reviewed the information and if everything looks correct, you need to change the status of the order to “Operationally completed”. Please note, you need to add a description of work completed when changing the status to Operationally completed on the gadget, along with completion photos. The submit button is greyed out until a document or photo is uploaded. You can do this from your **Contractors - Allocated Orders** gadget. If you come across an error message when trying to change the status to operationally completed, check that you haven’t added labour hours at an earlier time than the work assignment details that are in the system.

After you have changed to status to Operationally completed, the work order will move into your **Contractor Completed orders** gadget. The Internal Coordinator of the job will review what has been submitted and change the status to “Administratively completed”, which sends it through our financial processes for payment.



Summary of contractor gadgets

Contractors allocated orders – here you will see all the work orders that have been allocated to you, at whichever stage they are at, up until they are “Operationally completed” (at which point they move into the Contractor – Completed orders gadget). Selecting any work order brings up the information about it and when you scroll down, you can take some actions and the buttons may change, depending on where you are in the workflow of the work order. *NB: Please use this gadget to message the Estates Helpdesk if you have any queries about the work order.

Contractor quotations – here you will see all the work orders we have asked you to submit a quotation for, at whichever stage they are at in that process, up until “Quote approved”. You can message the Helpdesk from this gadget too, if your query is related to your quotation. You cannot assign work to your operatives until it is showing the Quote Approved status.

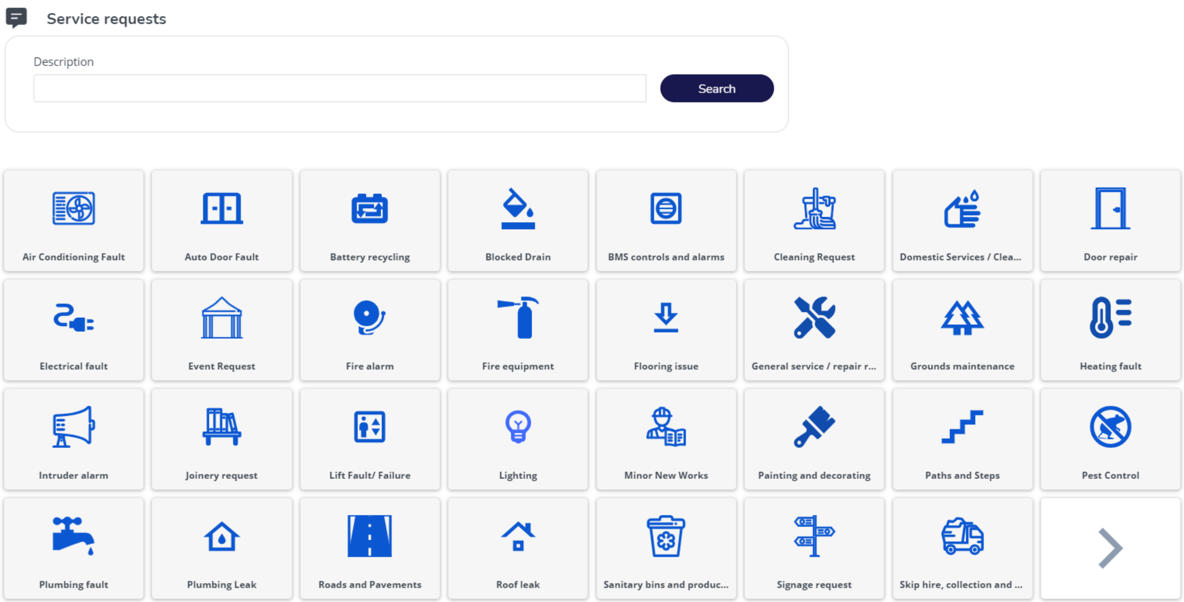
Contractor completed orders – here you will see all the work orders that are either “Operationally completed” or “Administratively completed”.

Upload compliance certificates – here you can view the compliance status of any Statutory PPM work orders undertaken. You can upload compliance certificates here by clicking into the work order, if your operative hasn’t done this via their mobile App. ***NB: Really important to update the hours, materials and job details before you upload the compliance certificate, as this will change the order status to Operationally completed.

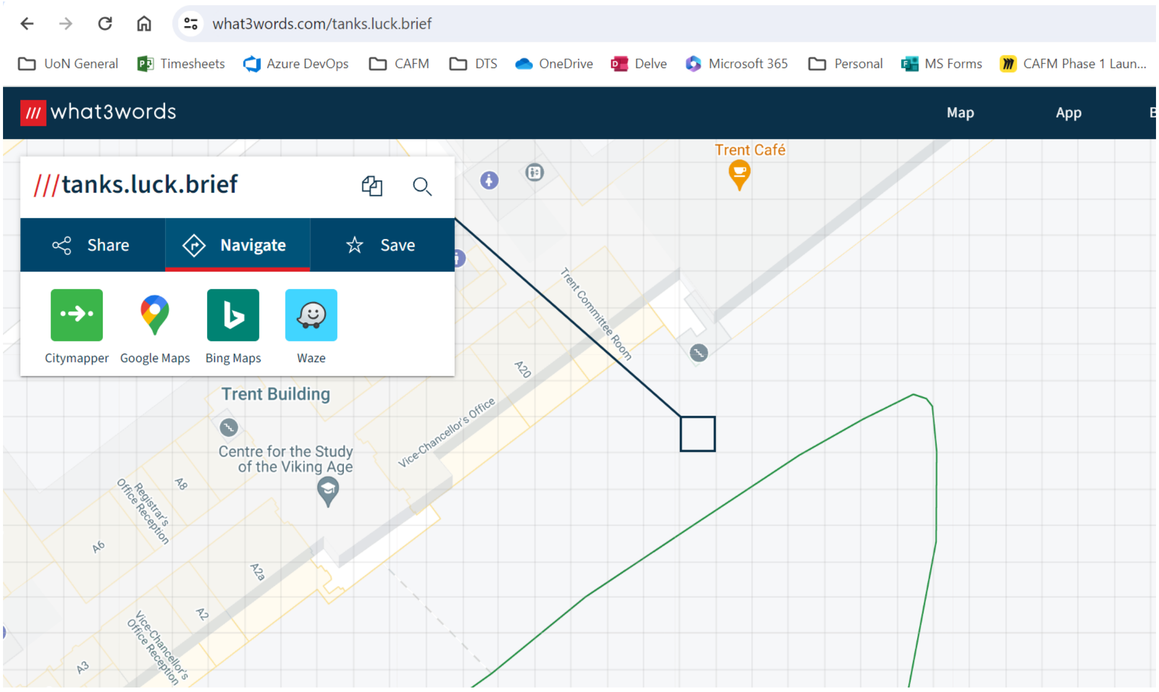
Orders financially completed – here is where all your work orders can be viewed once they have been fully completed and paid for.

Raising a work request

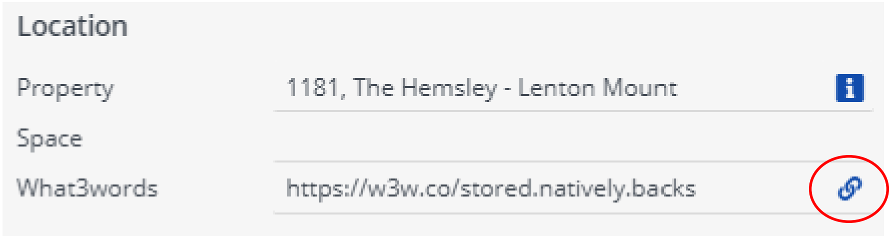
When one of your operatives completes a work order, they may discover that a follow-on work request needs to be raised, for example, a separate but linked issue they have discovered about the asset or space. In these instances, you can use the Service requests gadget on your Homepage. Listed here are the most common types of service requests that you might need to make. Once you have selected one, complete the form it opens for you. Fields with a red asterisk are mandatory for completion. You will see that the form uses dynamic questioning to ensure we are capturing all the important information needed in a standardised way. This enables us to quickly triage the issue and direct the work order to the correct individual or team.



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.
The service request form 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. This will show the tradesperson assigned to fix it exactly where the issue is. *NB: Not all work request forms have What3words options, only those where the request may relate to an outside space. All the locations of our assets in Planon, whether in a room our outside space, have been verified by our engineering team, so should be accurate at Go Live.

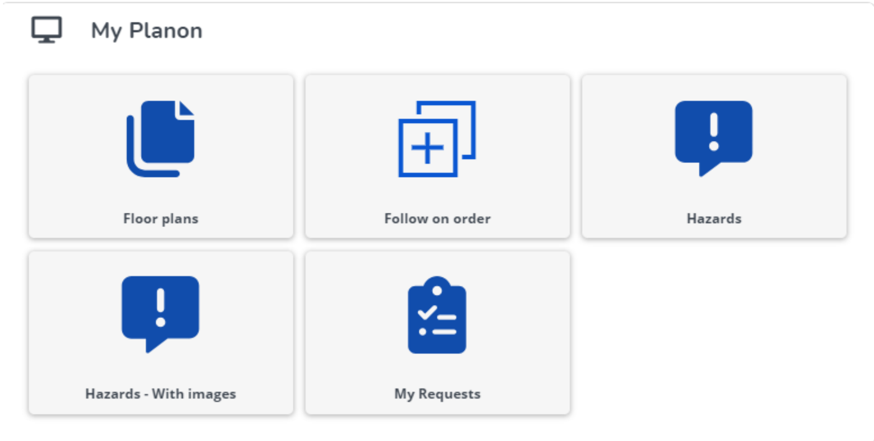


If What3words has been used to identify a location, you'll see the link to it in the Data Panel and it will also be available to tradespersons using the mobile App. Clicking on the link icon takes you to exactly where that location is on Google maps.



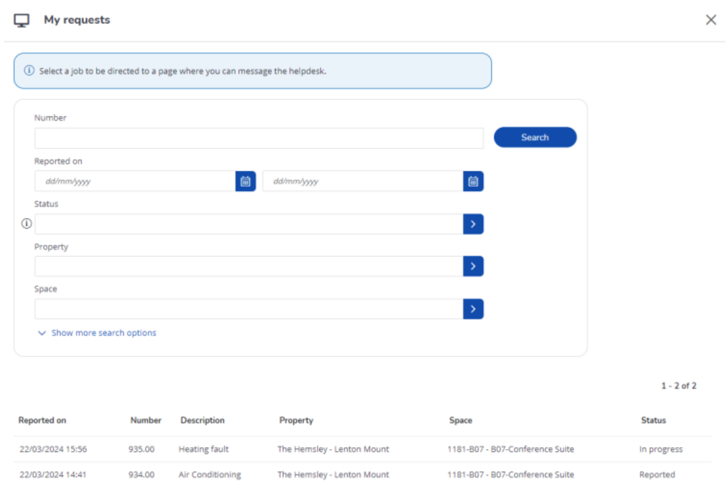
Raising a follow on order

In the majority of instances, the Helpdesk manages the process of raising follow-on work orders and tradespeople can also raise follow on work orders via the mobile App. However, there may be occasions when you need to do it, so it is worth knowing how. You can do this through the My Planon gadget on your Homepage. Click on Follow on orders and complete the form. This form will ask you the order number you want to raise the follow on order to.



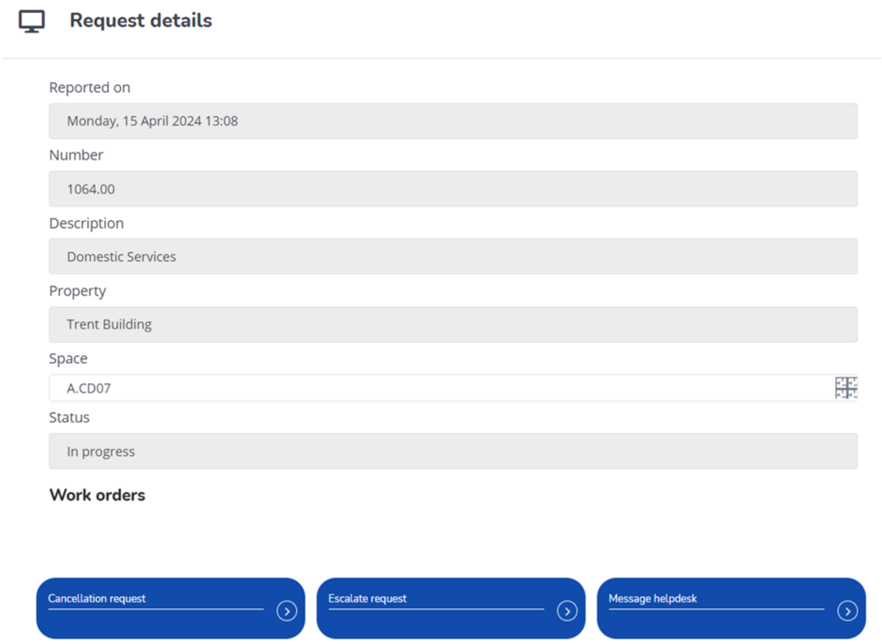
Using My Requests

My Requests (My Planon gadget on the Homepage) allows you to manage or do something further with the requests you've raised with the Helpdesk. You can use the Search function to look for it or you can view the requests you've raised in a list form beneath it. The list will show you the most recently raised requests at the top.



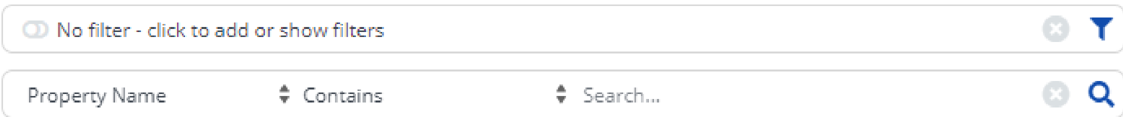
Selecting a request will show you the information you raised and the status of that work request, including any internal comments relating to that request. You can take one of three actions here:

1. Cancel the work request
2. Escalate the work request
3. Message the Helpdesk

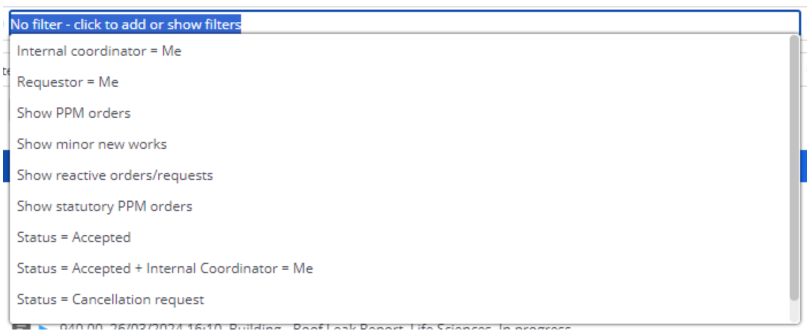


Using the filters

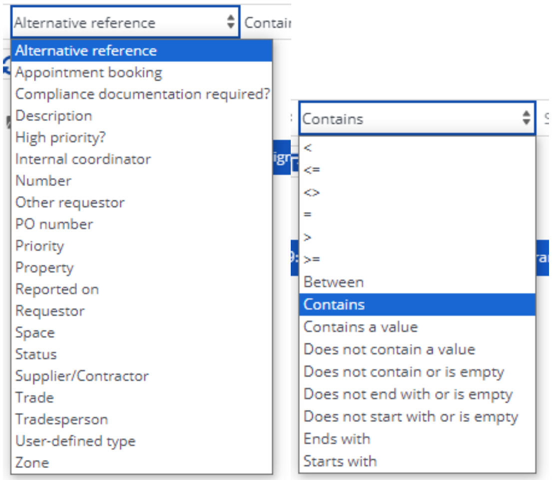
The Filters will help you find what you're looking for more easily.



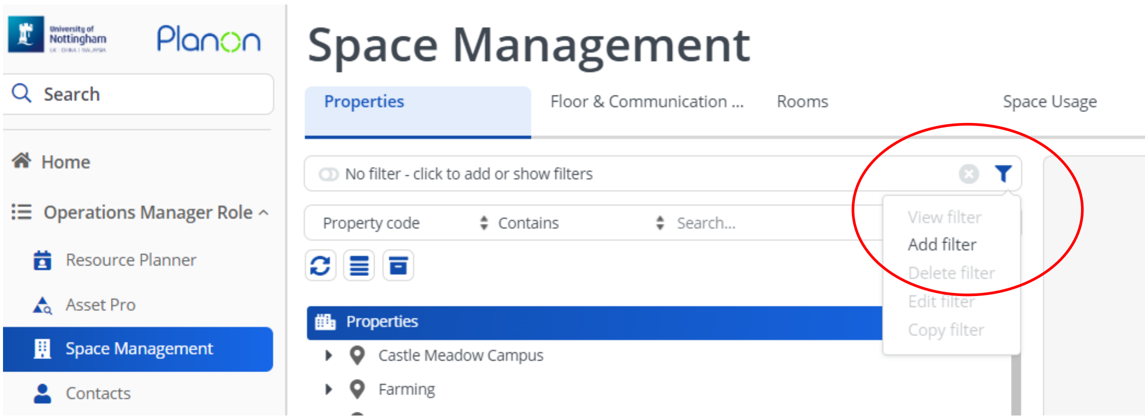
The top box gives you some pre-defined user filters, as set up by the system admin team.



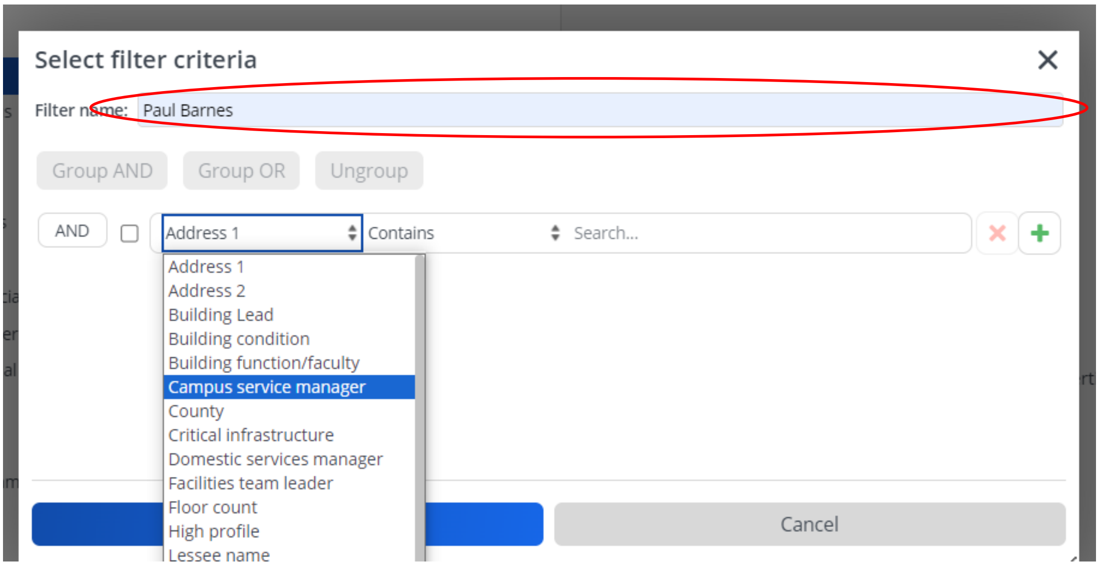
The next boxes are simple filters which you can use individually or together to refine what you're looking for.



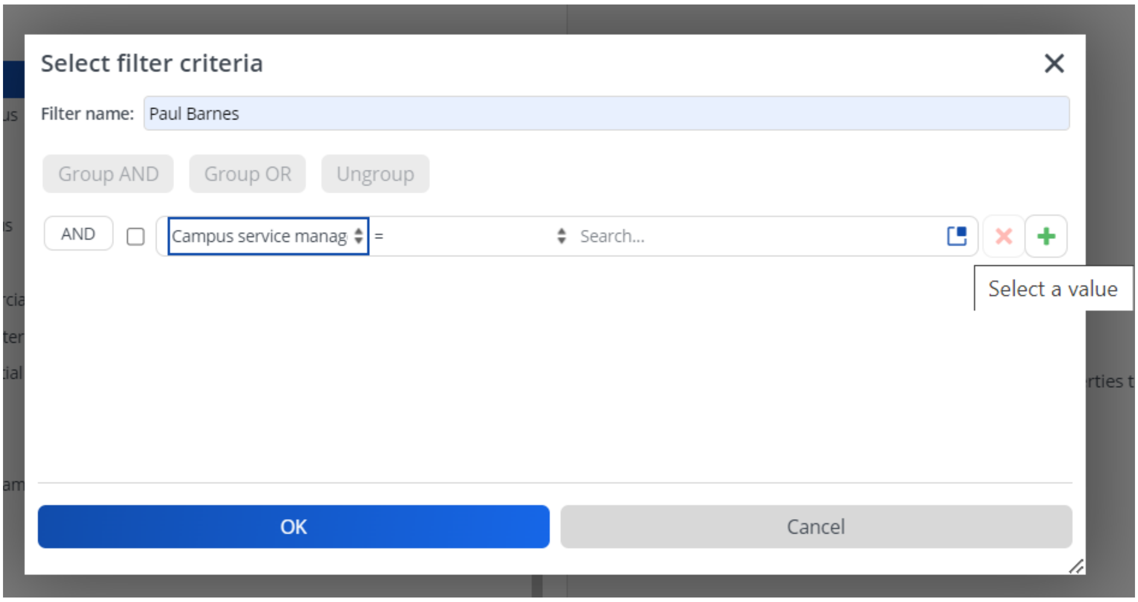
You can also create your own filters. In this example, we want to set up a filter that brings up all the properties that a specific person is listed against. Click on the Filter symbol and Add Filter.



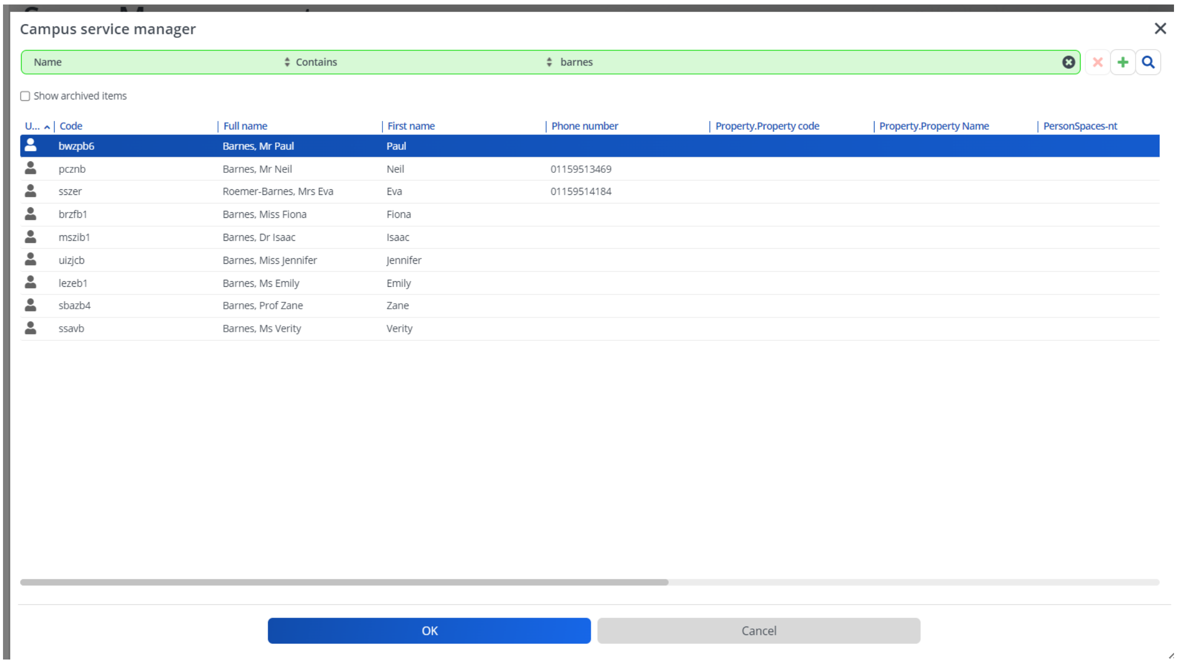
Use the top box to give it a name. In this example, we want to find all the properties that Paul Barnes' name is listed against.



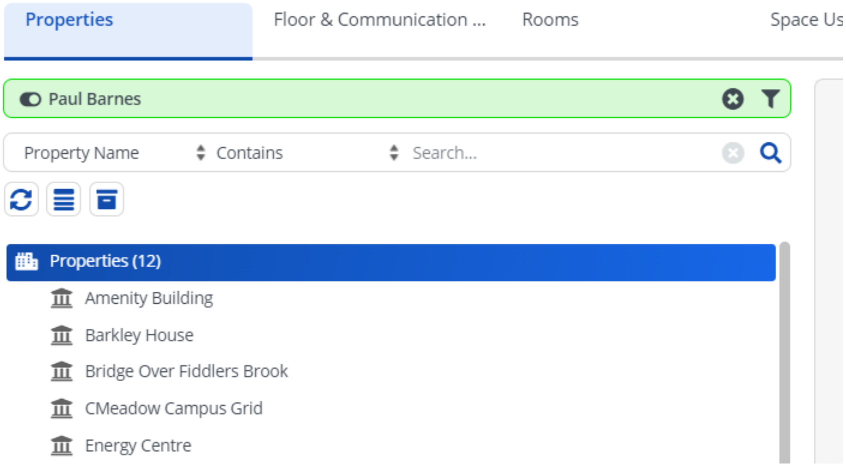
Click this icon, which brings up a list of people you can select from.



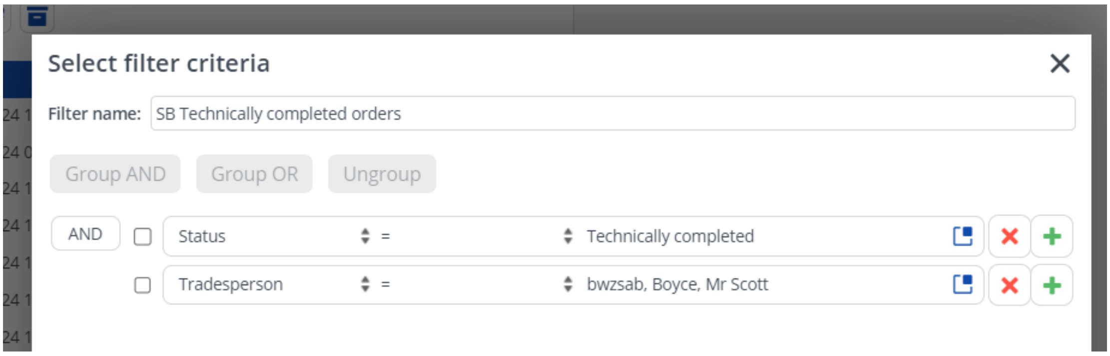
Find the person you are looking for – e.g. Paul Barnes. It is easiest to use the filter at the top – Name, then type in their surname and click the Search icon. Once you have found and selected them, click OK.



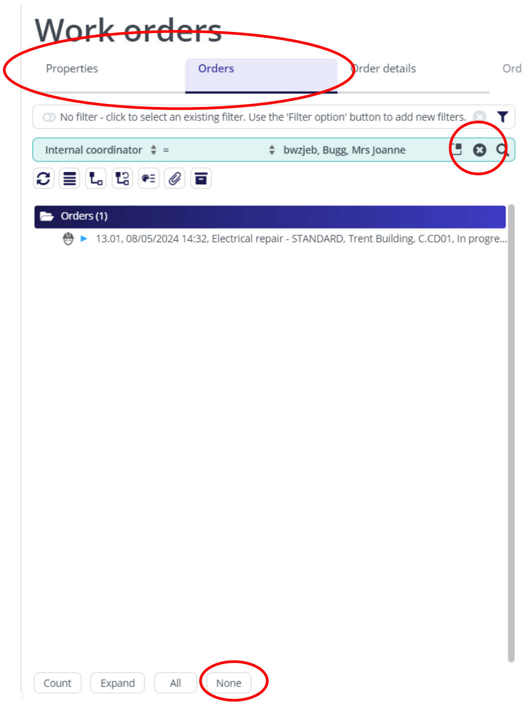
You will now see a list of all the properties they are associated with. When you next want to pull up that list, click into the Filter box and you will see the Filter that you created listed there.



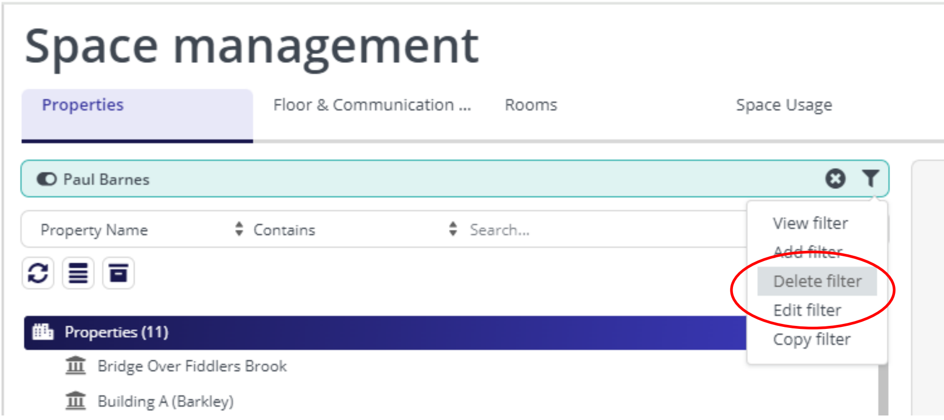
You can also create Filters that give you very specific information using the ‘AND’ and ‘OR’ options. In this example, we are creating a filter to pull up all work orders that have been reported as being ‘Technically completed’ and where Scott Boyce was the Tradesperson assigned to them.



It’s important to remember to clear filters when you no longer need them. Check the Selection Bar at the top – are they all clear or is there a Filter on? In your Filters area, clicking on the x symbol clears the filter you have on. Clicking on None at the bottom de-selects anything you have got selected within your Elements List.

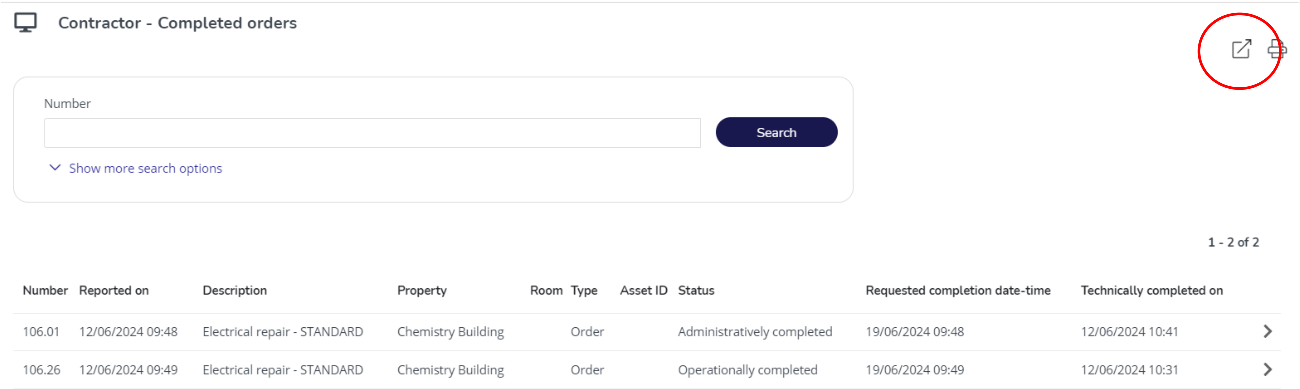


It is also useful to know how to delete a filter you have created that you no longer need. Simply select the filter in the filter box and click the filter symbol. You will see the option there to delete it.



Exporting data

Contractor admin teams are able to export lists from their gadgets on the Homepage by clicking on the Export icon, which downloads it as a .csv file. Clicking on the Print icon allows you to print off lists or individual orders in .pdf.



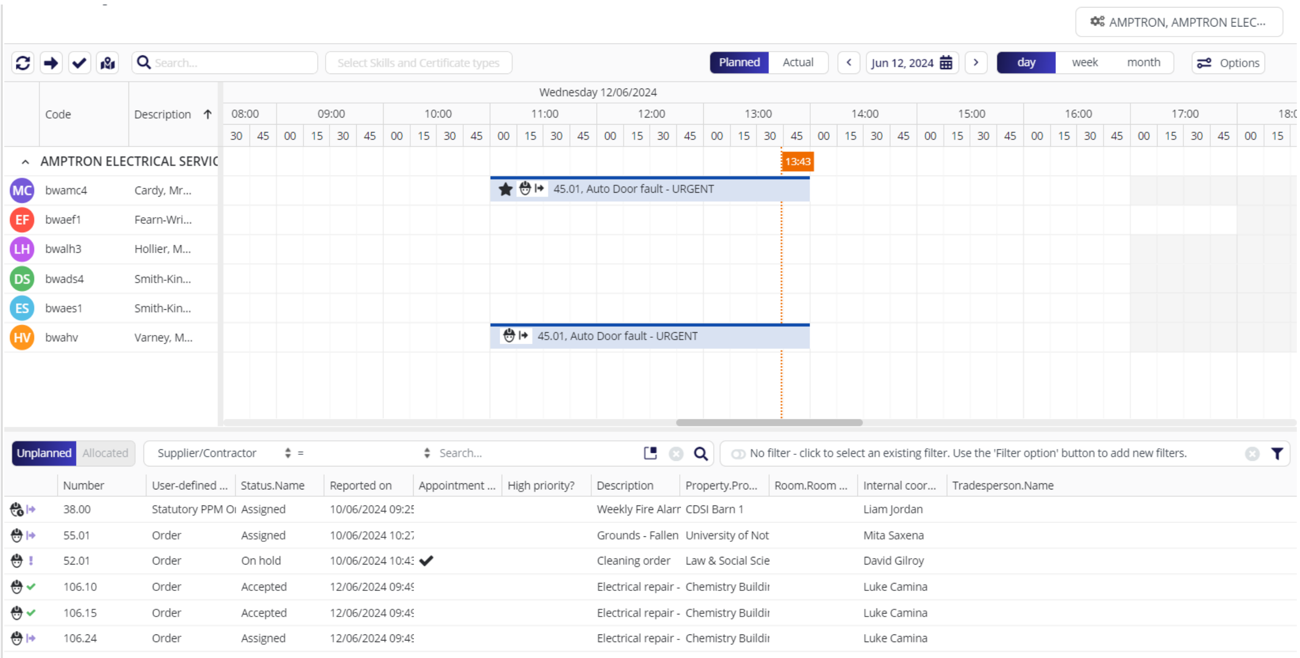
Using Task Planner

The **Task Planner** is an additional tool that we would like all our Tier 1 & 2 Suppliers/Contractors to use in Planon. This will help the university understand which of your operatives will be at which site, working on which order at any given time. The Estates back office will also have sight of your Task Planner.

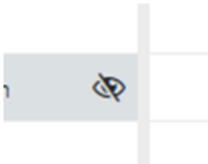
Task Planner is a graphical planner tool. It gives access to one **planboard**, on which you can plan and assign work to available resources. The orders and work assignments displayed within the Task Planner are those that have been Accepted by the Helpdesk and allocated to you. The resources who can be assigned work are the people that have been set up in Planon, as per the information you have sent us about your employees. You can use Task Planner to plan and assign jobs to them and they will receive these via their PMFS mobile App the same as they do when you do this via the Work Orders TSI.

We have already covered how you can assign work orders through the Work Orders TSI. Here we will show you how to do it through the Task Planner.

Your **Resource Panel** is on your left where your operatives are listed and the section next to it is your **Planboard**. You can change the view to be daily, weekly or monthly. The section at the bottom is your **Unplanned Orders Panel**. These are jobs that are ready to be planned and then Assigned.



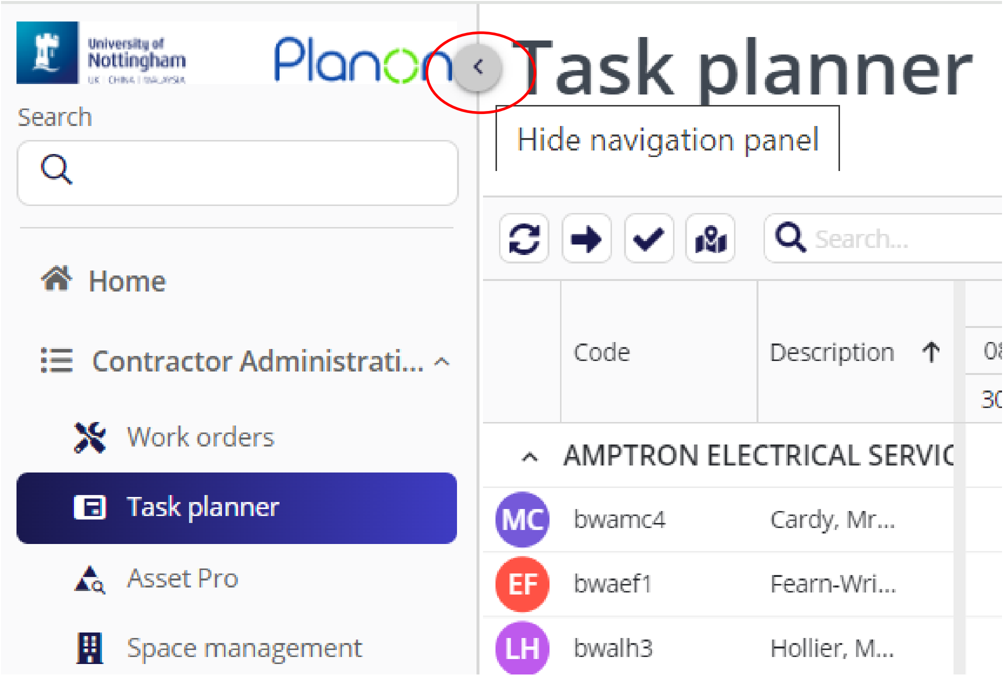
There may be occasions when you want to hide someone from the Task Planner so that they aren't allocated tasks. To hide a team member from the planboard, click on the eye symbol next to their name.



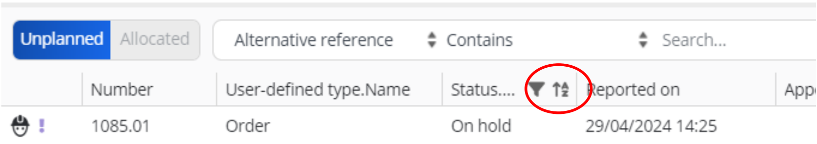
To bring them back into the list, click on the symbol next to the team name to show hidden resources.

Select from the individuals in the box who you wish to display again (by clicking on the eye symbol).

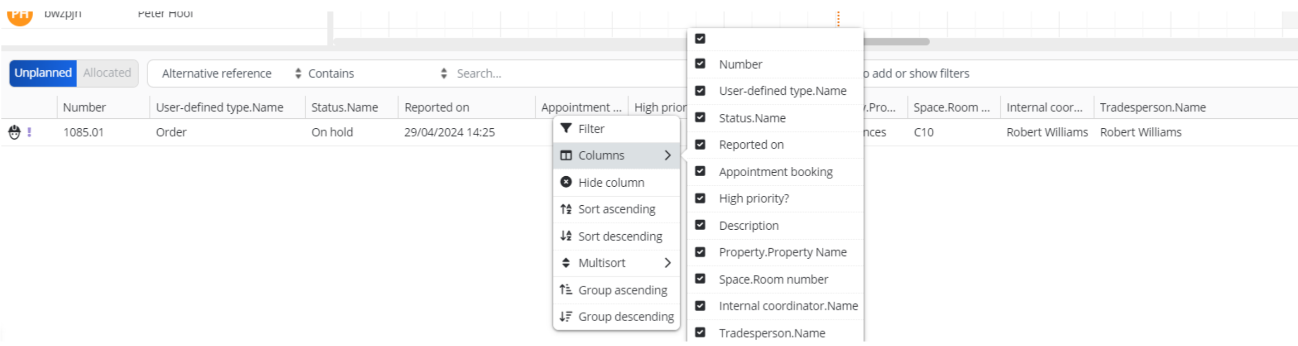
The Task Planner has work orders listed at the bottom of the screen. You can hide the navigation panel on the left, expand the bottom panel upwards and also resize columns to get a clearer view of the unplanned jobs.



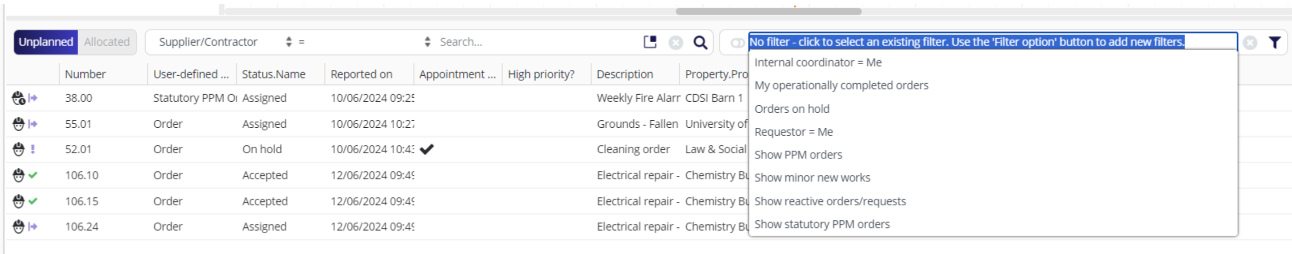
You can sort the unplanned jobs by clicking on the column headers.



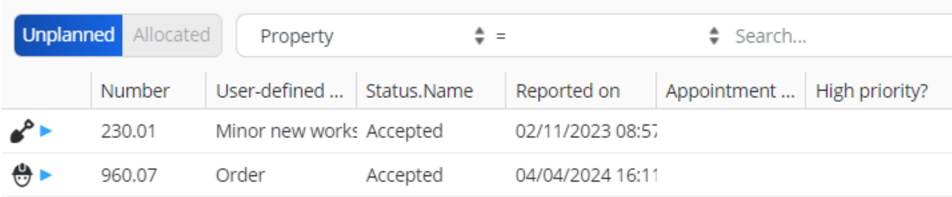
You can hide or unhide columns by right-clicking on any column, select Columns and de-select the ones you don’t want to see.



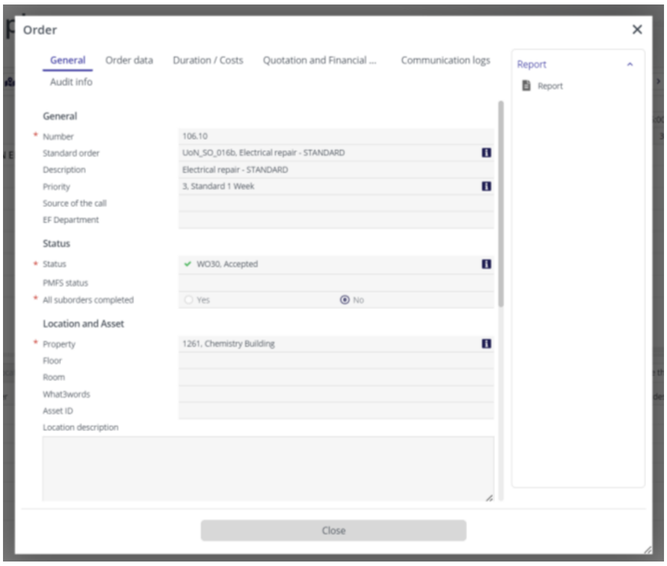
There is also a quick search bar and a filter bar with some pre-configured filters.



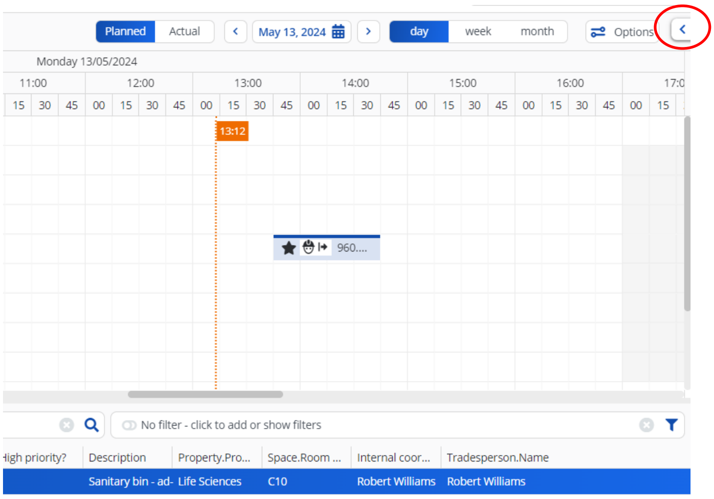
Work orders shown in the list below your planboard are those with a status of Accepted, On hold or Temporary fix ready for you to assign to a person.



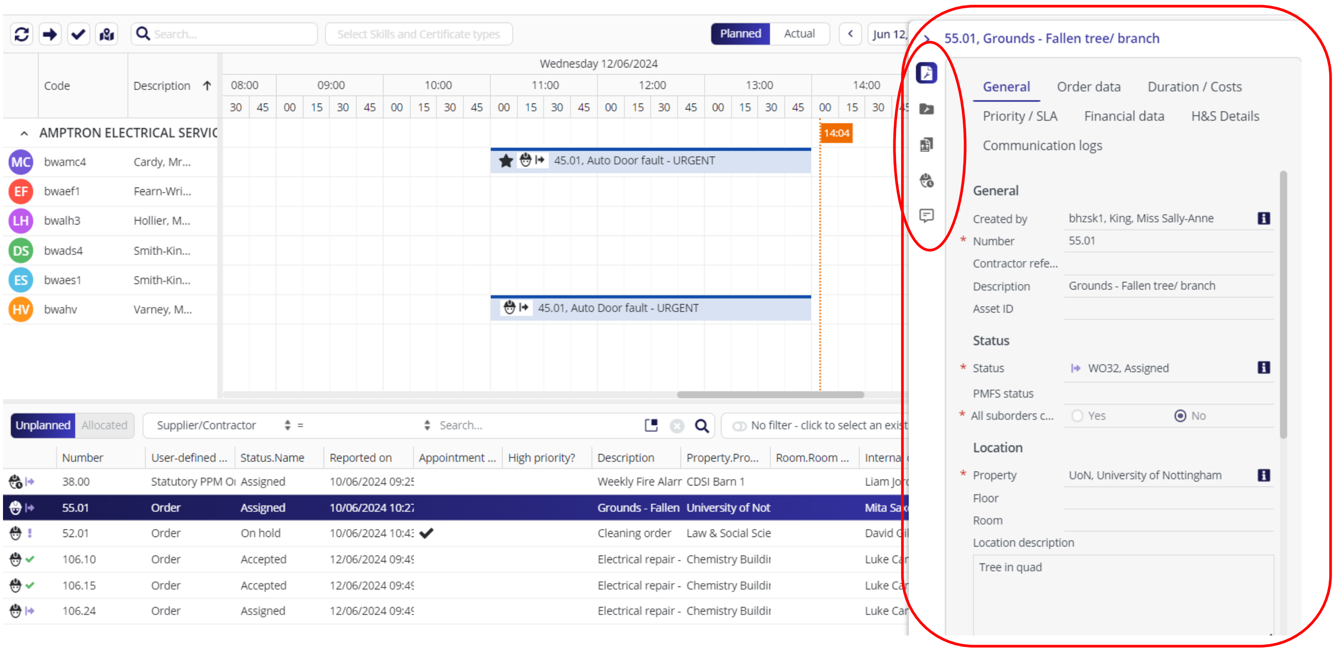
To view more detail/information about the work orders in your list, **double-click** on them and a pop up will show all the information from the Data Panel in that work order. This will be **read-only** which means you cannot edit any information here.



Single-clicking on the work order reveals an arrow which you can click on…



… to bring up a read and write panel about that work order – you can **edit** some information here, for example, work assignments.



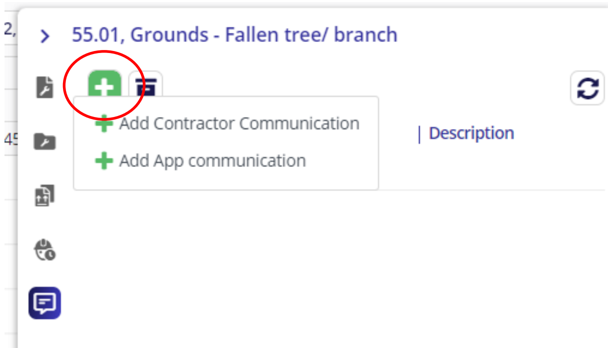
First icon – information about the work order – not editable

Second icon – work assignments – here you can add/amend work assignments

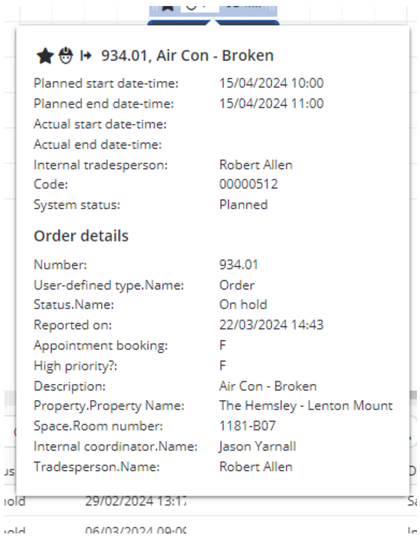
Third icon – order lines – here you can add in materials/plant hire

Fourth icon – labour hours – you will see the hours logged via your operatives from their PMFS Mobile App here

Fifth icon – Communication log – you can add a contractor or App communication here



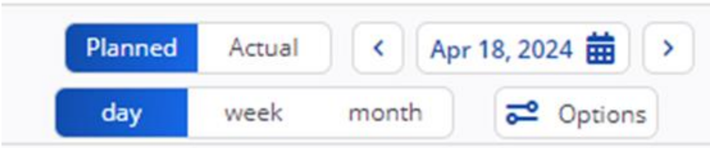
Hovering over the job when it's on your planboard shows you a high-level summary of the job.



Your Task Planner has a built-in filter to enable you to plan the time for a work order and also view the Actual time taken on the job once this has been confirmed on the App by your member of staff. Just click between the 2 filters to toggle them on/off.

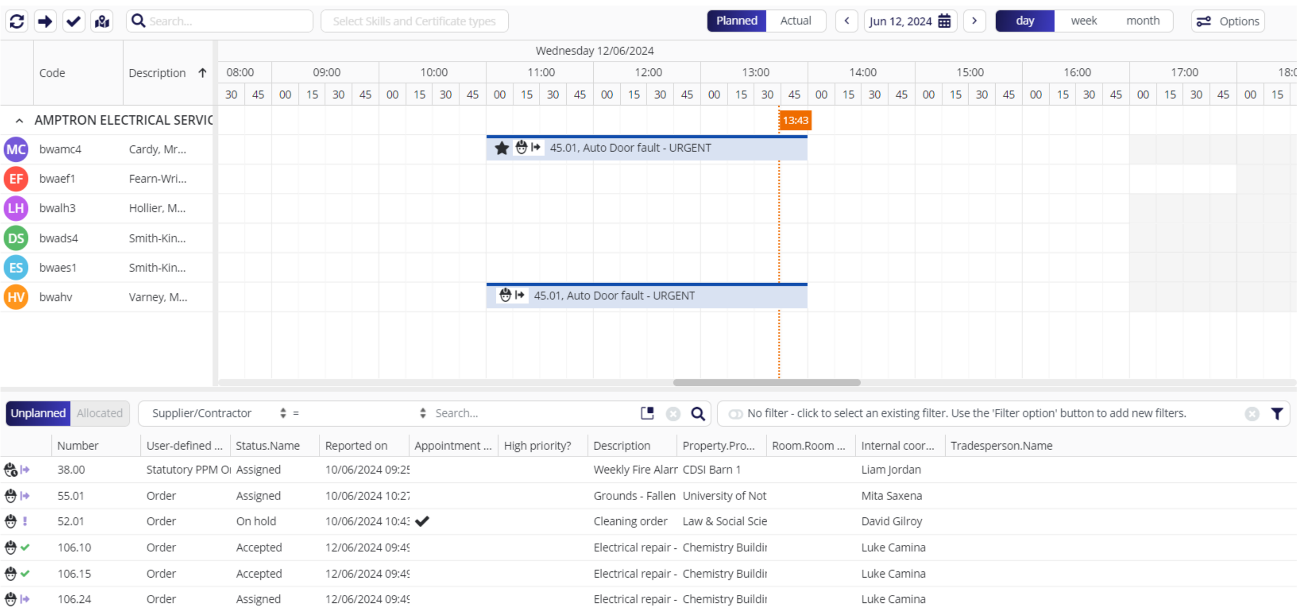
- Planned time is time allocated on the Task Planner.
- Actual time is taken from the PMFS app when the assignee ‘starts work’, then ‘ends work’.

This might be useful for understanding how long certain jobs usually take to complete and allow you to more accurately forecast your resource allocation in the future.



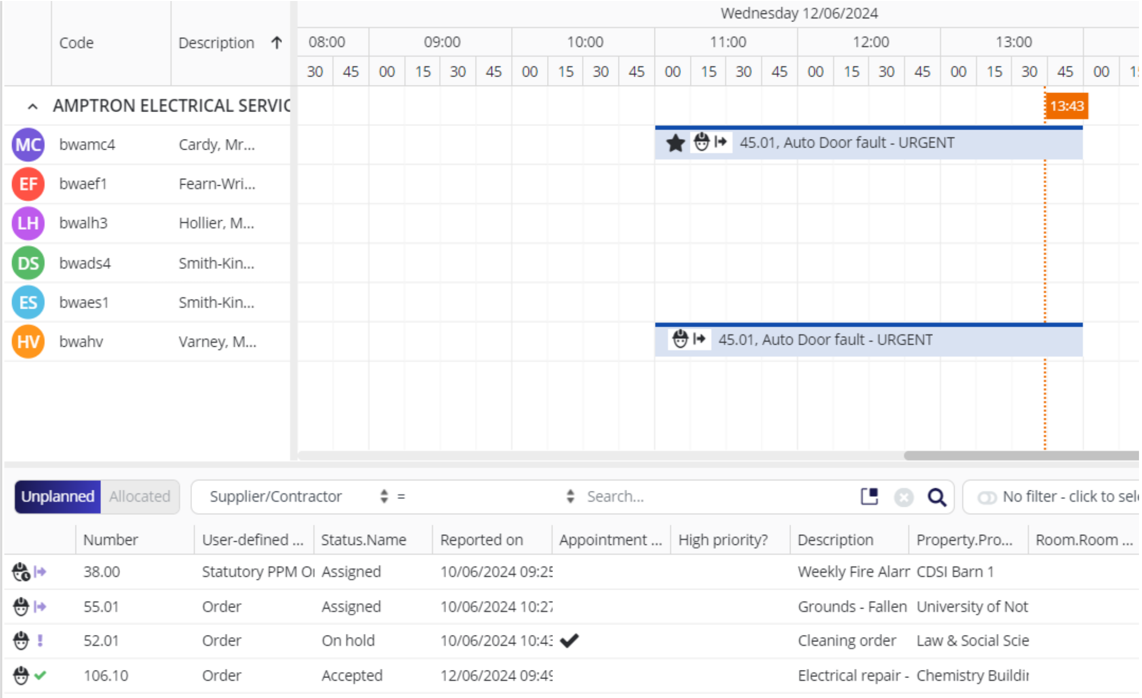
Task Planner – Assigning a work order

Think of the Planboard as a planning tool. The Planboard can be used to plan work without assigning it to the person until you are happy with your plan. You can drag and drop orders into a team member’s schedule and then move jobs around the planboard to different people and/or different times. Your operative doesn’t receive the job until you change the status to Assigned on the Planboard. If you’ve already assigned the job via Work Orders TSI and added a planned start/finish date/time, you will see it already there on your planboard.

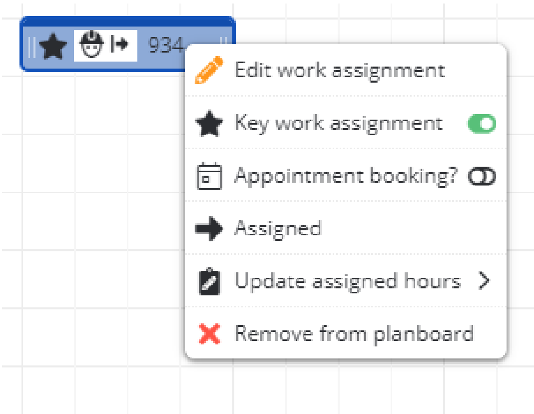


A **work assignment** is a ‘job’ to be carried out by the tradesperson. Work orders can have just one work assignment or many (e.g., for a two person or multiple-person jobs). Typically, the **work order** contains information on the what and where (location and task description), while the **work assignments** include the who and the when (resources and time).

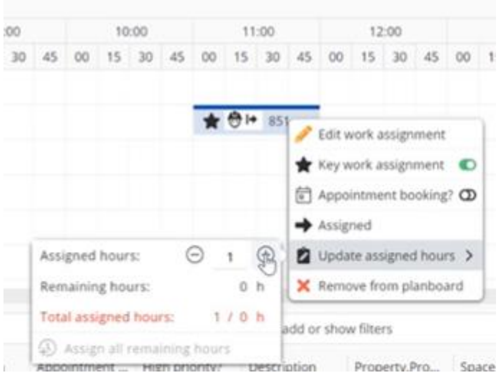
Once you have moved the work order onto the planboard against an individual, right-click the task and click Assigned to push the task to them via the PMFS app. Once you’ve clicked Assigned, this changes the status of the work order to Assigned and the information of who has been assigned to the job will be available to any person who has access to view information about that work order. If you do not click Assigned, they won't receive the job in their job list on the mobile App.



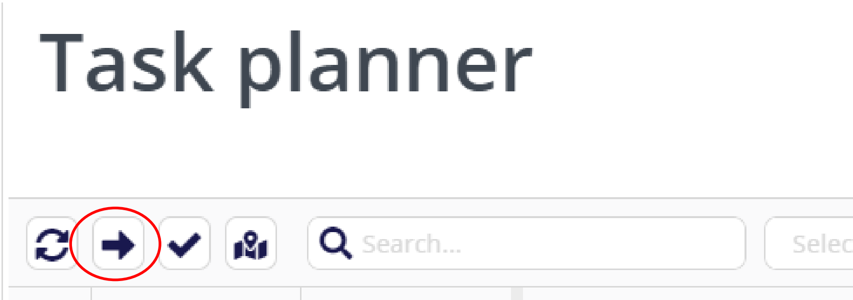
*NB: "Key work assignment" is enabled as a default for when you assign one person to one job but when you are assigning multiple people to a job, you need to decide who will be the lead on it, as you also need to do if assigning from the Work Orders TSI.



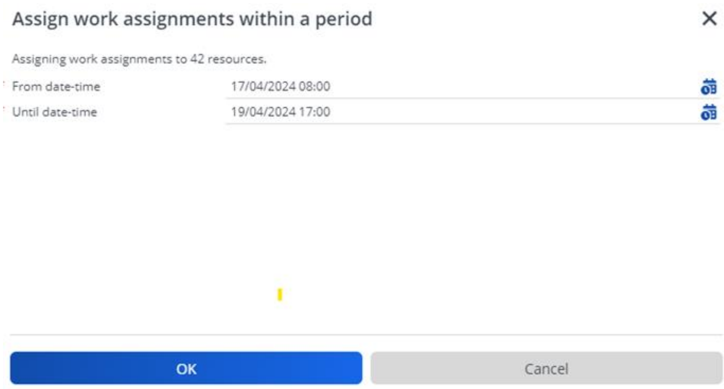
You can adjust the time you expect the job to be completed on by right-clicking on the planner board task. In the 'Update assigned hours' option, select how many hours a job should take in total. Alternatively, you can drag the side of the task box to extend or reduce the time it should take to complete the job.



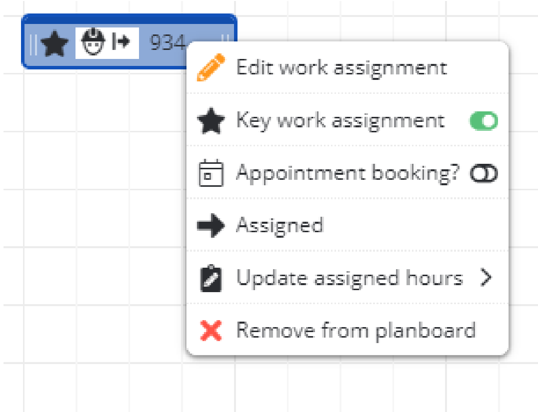
Once you have populated your planboard with all the jobs (or work assignments) allocated to different people, you can push all the jobs out to their mobile Apps in a single action (as opposed to right-clicking and Assigning each one individually). Click on the arrow at the top.



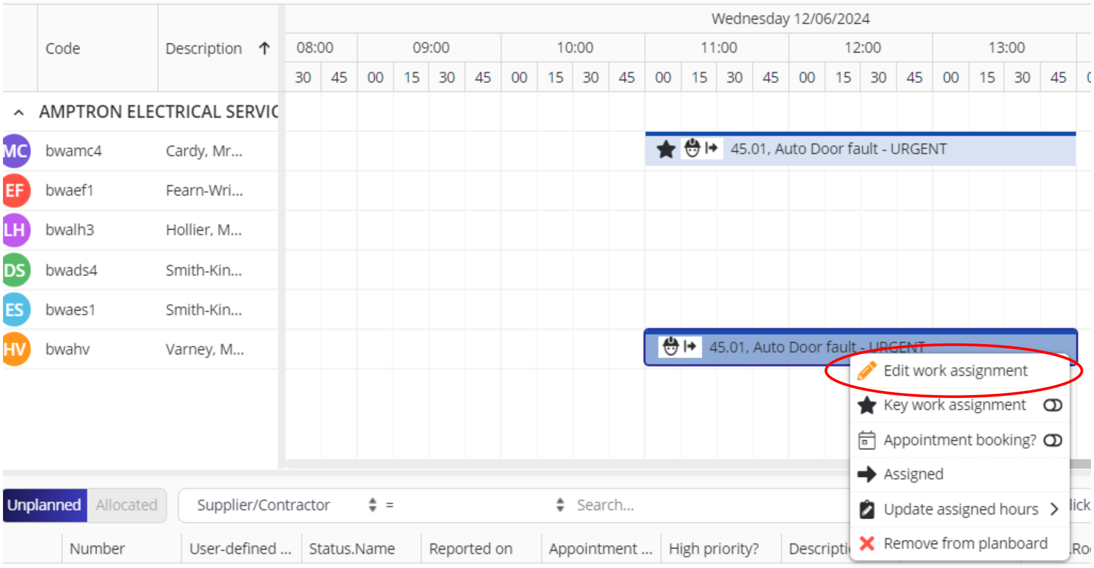
Adjust the period (for example, you could assign all the jobs for a specific day or for a full working week), then click OK.



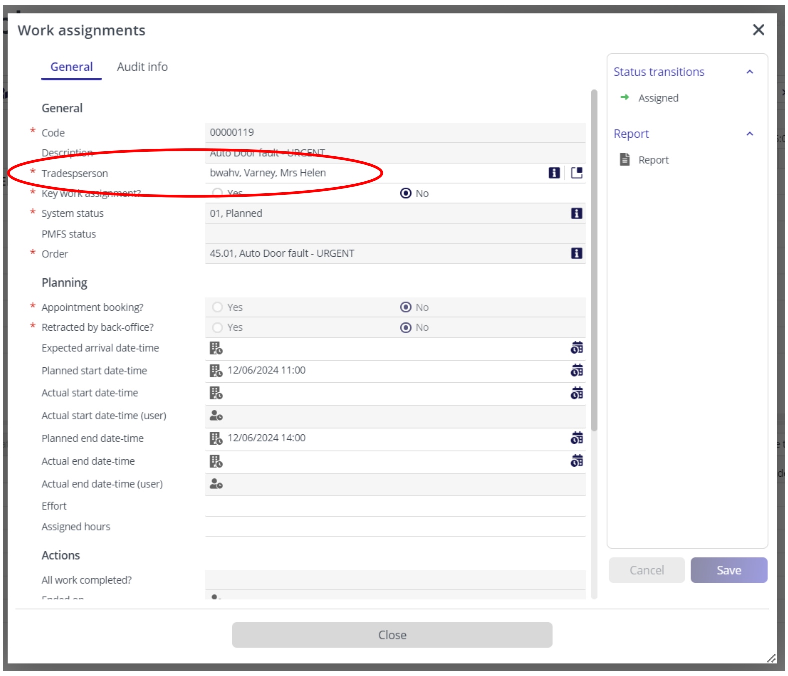
When you right-click on a work assignment on the planboard, there are a few actions you can take. “Remove from planboard” moves the work order back to the work order list below it, but only if you’ve not Assigned it yet (sent it through to the tradesperson’s list of jobs on the App).



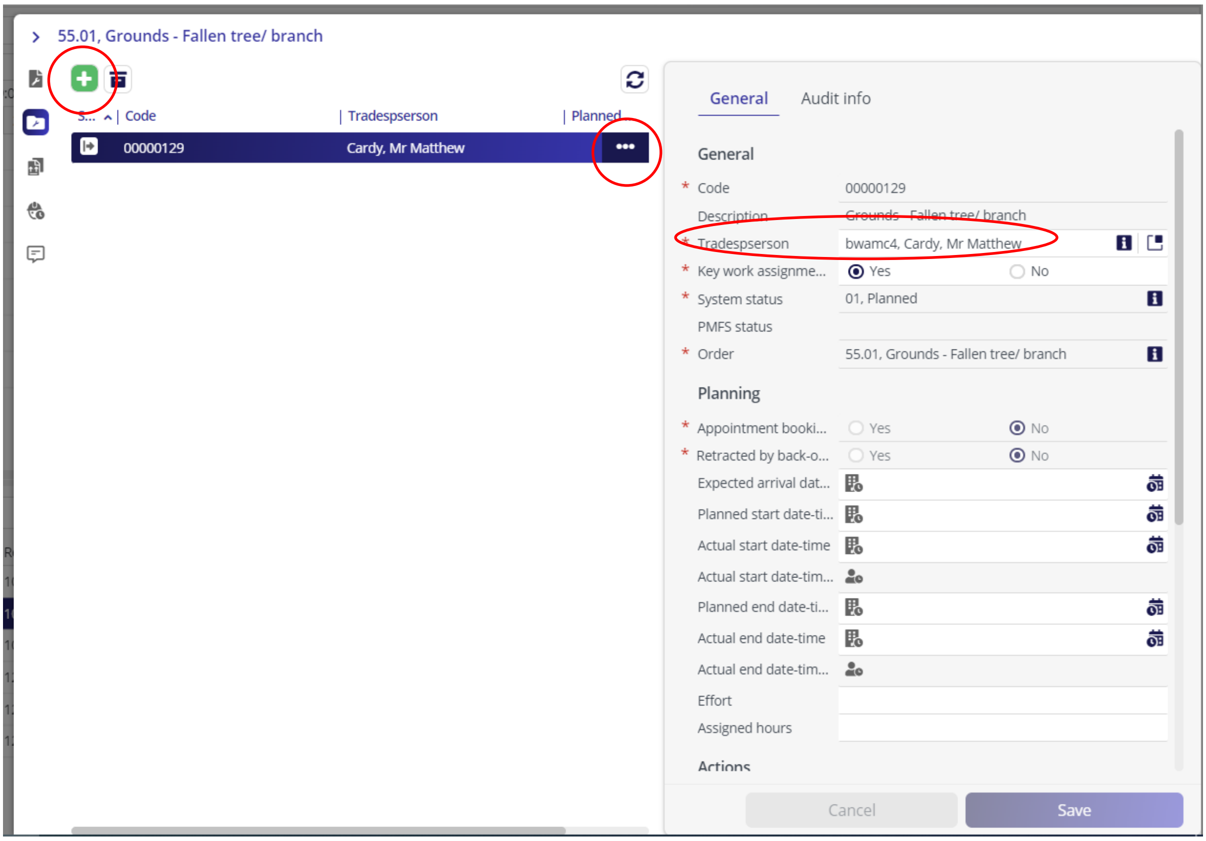
You can also edit a work assignment from here. Let's say you've assigned a work order to someone and then you decide to assign it to someone else but it has already been sent to the first person's device…if you then try to 'Remove from Planboard', it will no longer appear in the work orders list below. However, there are a few ways you can do this, without clicking on 'Remove from planboard'. You can make amendments to the work assignment by right-clicking on the work assignment in the planboard, then 'Edit work assignment'.



This brings up a pop up box where *some* fields are editable. You could change the name of the person here…

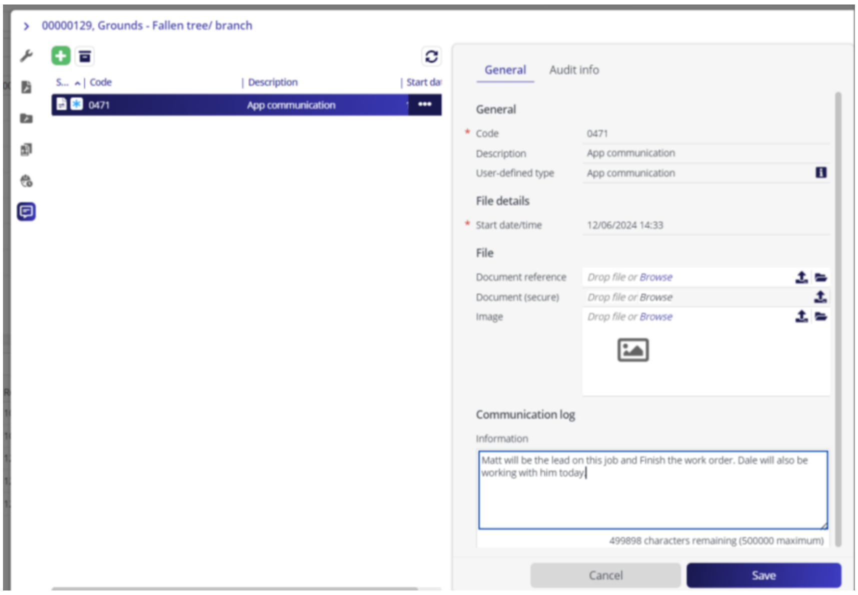


You can also make changes to the work assignment from the planboard by single-clicking on the work assignment to reveal the arrow on the right-hand side of the page. Clicking on that arrow opens the work order on the right-hand side of your screen and in the work assignments section (second icon down), here you can make the changes you want to.

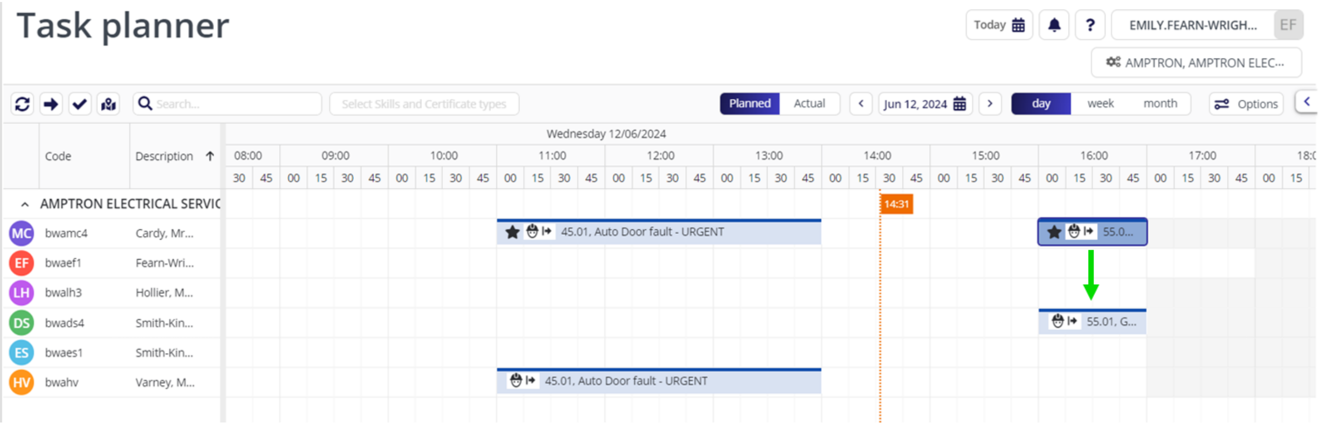


You can also add more people to the job by clicking on the + symbol. Using the ellipse (3 dots) option, you can also copy the work assignment details and then change the name of the tradesperson or you could delete it entirely which removes it from their job list.

To add more than one person to a work order, drag the work order from the list at the bottom of the screen to a person on the planboard, as you would do normally. This person is automatically designated as the 'Key work assignment' on the job. At this point, single-click on it to reveal the hidden panel and select the Communication Log – App communication. Here, add a comment to specify which tradesperson is the "key assignee" – this is important so that they see this in their Communications card on the App. You may also want to add in who else is working on the job here.



Now to assign that job to multiple people, you need to duplicate the work assignment. Hold down CTRL, left-click on the task and drag the copy to the additional person(s) that you wish to add to the job. If you're struggling to do this, try expanding the planboard a bit. You will see if you right-click on the jobs that the first person you allocated the job to is marked as the 'Key work assignment'. If you click on the copy, you will see that they are not designated as the 'Key work assignment'. Alternatively, you could add work assignments in the pop out data panel by single-clicking on the job (top right hidden arrow) and adding a work assignment there. The final step is to send the job to their apps by right-clicking each one and clicking Assigned.

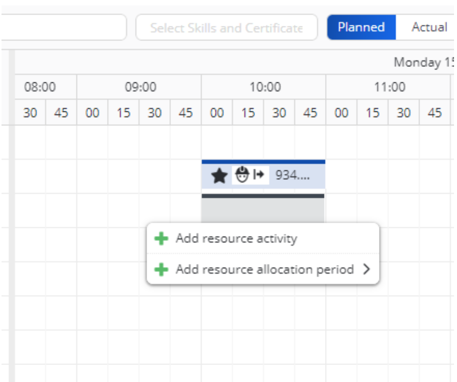


Designating someone as the "Key Assignee" on a work order ensures that they are the only person who can close the job down as "Technically completed" (by clicking Finish Order on their App). All other people on that job can only click "End work" via the App.

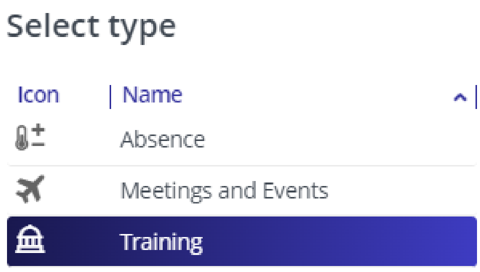
Remember to right-click on each task and select Assign to complete the process and push the jobs out to their mobile App job list.

Task Planner – Personnel Events

To block off times/days so that team members cannot be assigned tasks during that time is very easy to do. Select the time in the planboard by clicking and dragging your cursor over the required day/time. Select "add resource activity".



Select one of the 3 options – Absence, Meetings and events, Training.

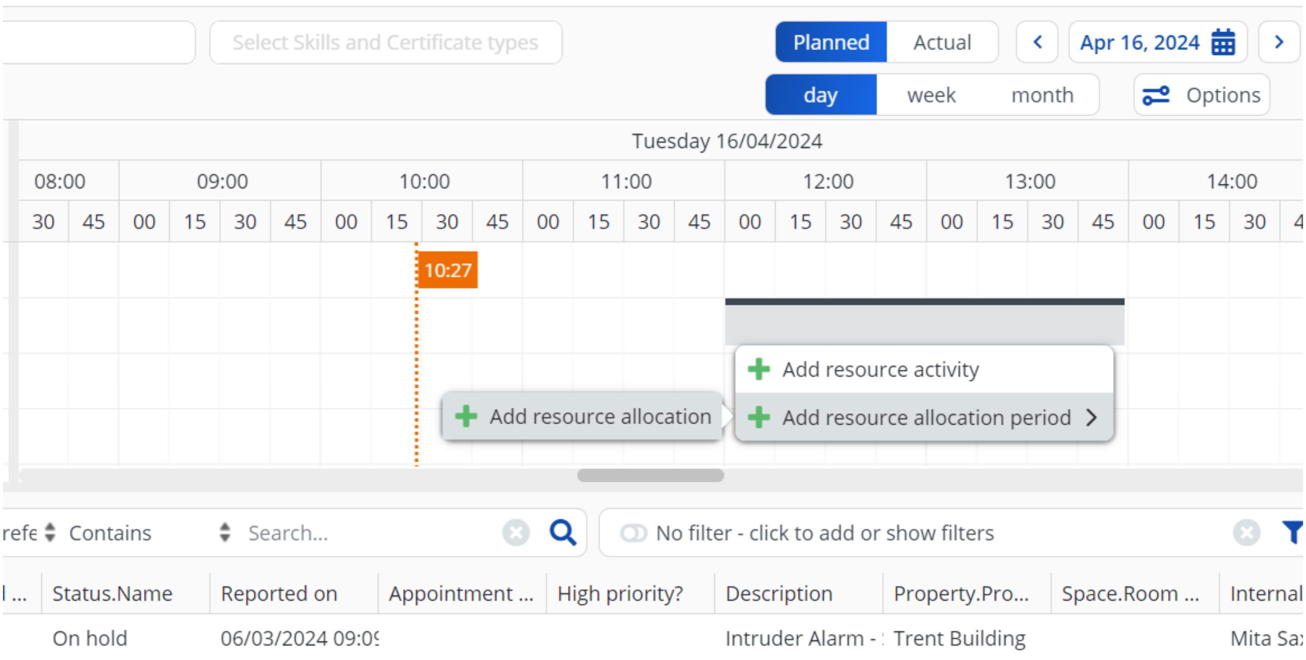


To add more detail to the activity, click on the time block, where you can provide more specific timings and additional comments. You can change the name of the event here too (e.g. H&S Briefing). Unfortunately, there isn't a way to push this event out to their job list in the mobile App but it does stop them from being assigned anything else during that time period.

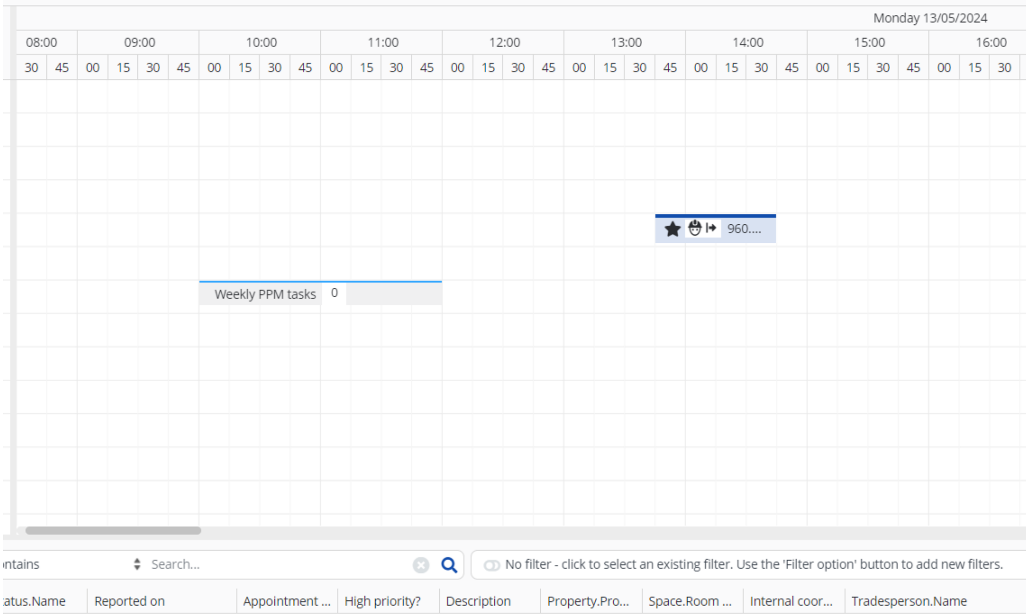
Task Planner – Resource Allocation Periods

The Resource allocations feature enables 'bulk planning' of work assignments. The feature allows you to pre-allocate specific periods to the available resources or teams on the graphical planner. Later, when you start with the actual planning, you can 'drag' work from the Unplanned panel into these allocated periods. An example of why you might use Resource allocations would be to pre-allocate a person or a team's working time to a number of tasks within a specific building. Or you might use it for work orders relating to graduation events where you know when and where they'll be and who you want to do the work, or, regular PPMs.

Adding a resource allocation period works in a similar way to adding a personnel event but this time. click the other option, as shown below. In the pop up box, give it a name.

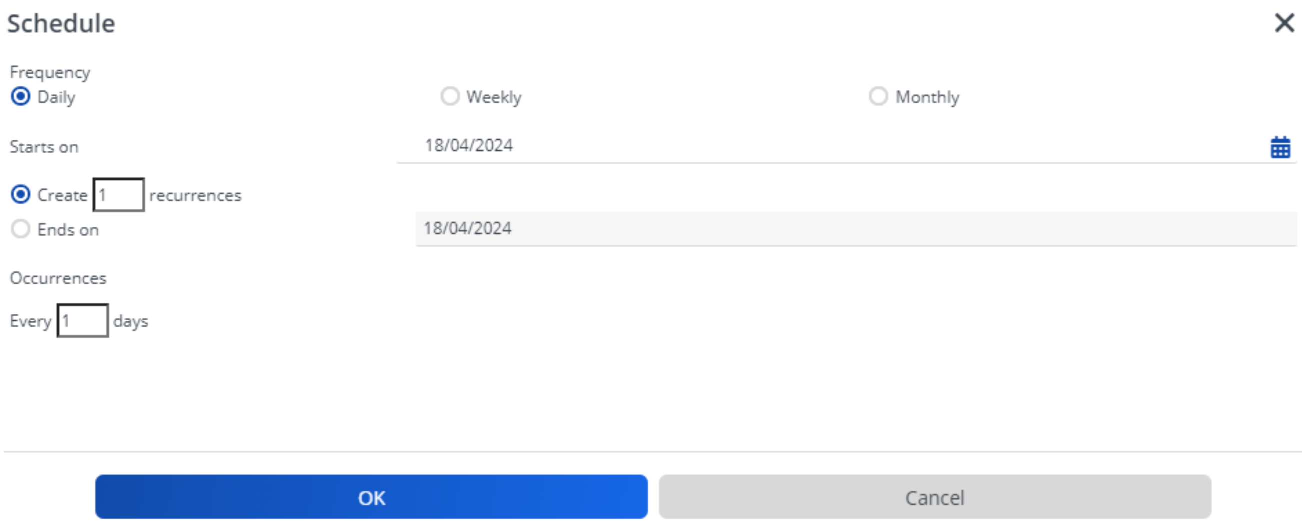


Now that the time has been allocated, you can drag and drop multiple work orders into it from those listed below your planboard.

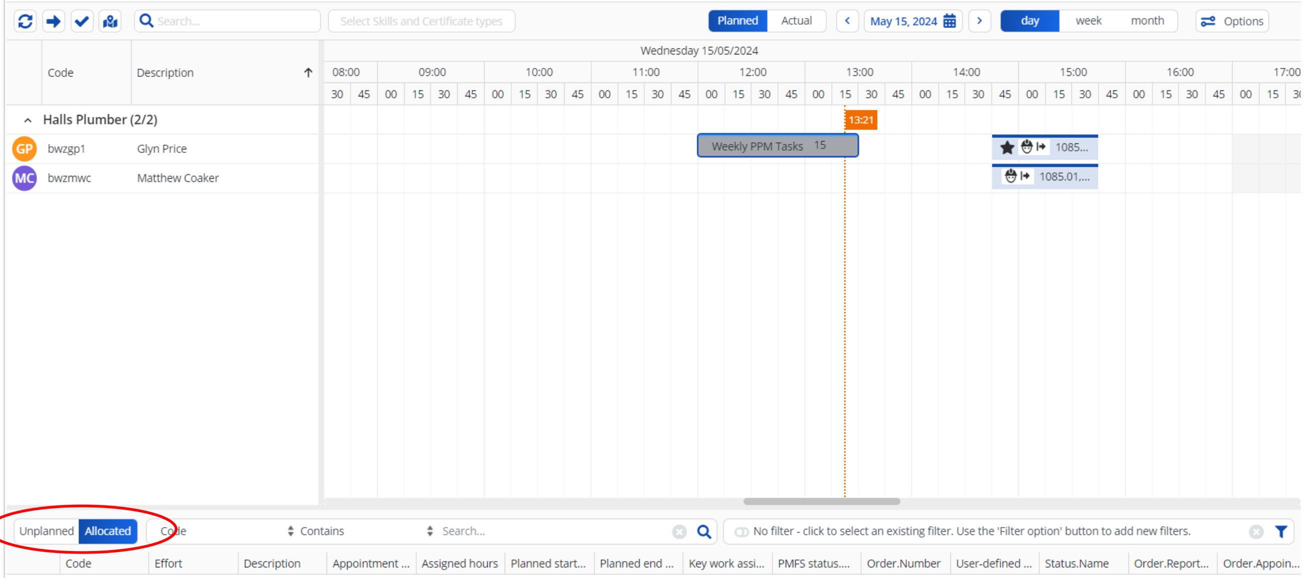


You will see the option to make it a recurring activity, which will be useful for repetitive tasks, such as regular PPMs (e.g. weekly fire alarm tests).

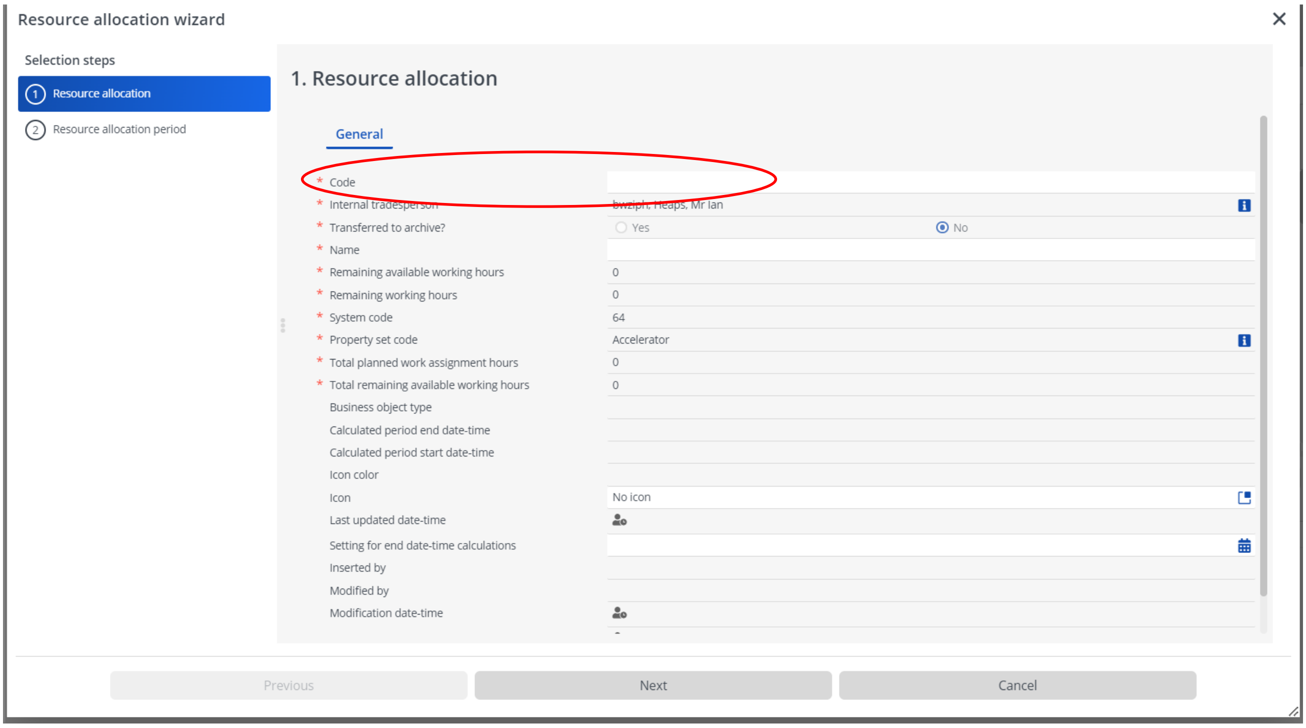
Once you've defined the parameters, click OK.



If you then click on the Resource allocation, note that below the planboard, it switches from Unplanned to the Allocated tab and the work orders you've put in there will show below.



*NB: The code can be whatever you want it to be but must be "unique". Planon won't let you create more than one Resource Allocation period with the exact same "code".



If you need any further help with using Planon, please contact one of our engineers/surveyors for further support.