Residences Helpdesk User Guide

Contents

Log In	3
Reactive Maintenance	3
Statuses	7
Raise a Request	8
Mandatory fields	8
Requestor	8
On behalf of	9
On behalf of (text) & Contact email address	9
Email required?	9
Property	10
Space	10
Location in room	12
Status	12
Cancellation reason	12
Standard order	12
Question – Which suborders should be added?	12
Order group	12
Description	13
Details	13
Requested completion date	13
Start date & time, End date & time, On hold until, Related order	13
Save the request	13
Duplicate request	14
Assign the job	15
Select the job	15
Add Start date & time	16
Add End date and time	17
Display type	17
Set to Job assigned	17
Non-maintenance jobs	18
Internal Tradesperson	18
Set to Job assigned	18
Print job ticket	18

Contractor jobs	
Completing a Job	20
Maintenance team	20
Non-Maintenance Job	21
Contractor Job	21
Held Jobs	21
Completing a Request	
Set multiple requests to Completed	
Set one request to Completed	
Show completed requests	
Follow-up a Request	
Cancel a Request	
Viewing the List	
Select Properties	
Filters	
Show list	
Sorting	
Search	
Guest Check In – Maintenance Issue	

Log In

TEST SYSTEM – Up until May 30th https://estatesportaltest.lse.ac.uk/ Username: your network user name Password: test Background colour = grey

LIVE SYSTEM – May 31st onwards https://estatesportal.lse.ac.uk/ Username: your network user name Password: your network password Background colour = blue

Save the web links to the Test and the Live systems in your browser bookmarks.



If you do not get the sign-on screen it may be because there is a problem accessing the campus network. This can be fixed by installing Pulse. Here are the instructions: http://www.lse.ac.uk/intranet/LSEServices/IMT/guides/workingOffCampus/installing-pulse.aspx

Reactive Maintenance

Ignore the Self-service panels (Request a service and Job tracking) Click "hamburger" icon at top left Select MM02 Reactive Maintenance – 02 Operations from the menu that drops down:

\leftrightarrow \rightarrow C \triangle () https://estates	por	taltest.lse.ac.uk/home/PSS/ProCenter?77		
Estates Division				
Home				
01 Spaces	~	a service - Campus	•	Job tracking
03 Document Library	~	ew request		List
MM02 Reactive Maintenance	~			Completed jobs awaiting feedback My requests
Ø 02 Operations				
🤌 03 My orders		ting		
MM11 Health & Safety	¥			
U90 Basic Options	÷			
https://estatesportaltest.lse.ac.uk/home/PSS	/Pro	Center?77#000000299		

Only your cluster is shown. (Facilities managers can see all clusters).

🤌 02 Operations			
Properties Filters	Orders	Order details	\rangle
Properties			
No filter		T	Ê
Asbestos Free? 🔻 = 🔻		(† ×	9
6 6			
1 Properties			
Residences North Cluster, London			

If you want to restrict the jobs further to one building:

Click the triangle or double click the icon to see the buildings underneath it Single click one building

🤌 02 Operations			
Properties Filters	Orders	Order details	Order sub-detail:
Properties			
No filter Asbestos Free?		Image: 1 min and 1 min	General
08			General
Note: Properties			* Property na
Residences North Cluster, London			Parent leve
Passfield Hall, London			Parent leve
Rosebery House, London			Туре
			Property Ty
			Status

Click the Orders selection level (arrow tab)

🤌 02 Operations				
Properties Passfield Hall, London	Filters	Orders	Orde	er details
Work orders				
Requests - all			• ê	
Accrued from • =	Ŧ			
📂 Orders				
▶ 🎕 ► 16675.00, PA, J	Anderson, Leak from cei	ling, 26/04/2017 13:40, 26/04/2	2017 13:41, 2	
▶ ≪ √ 16673.00, PA, I	Maintenance North Clus	ter, Anderson, Blocked toilet, 26	5/04/2017 10:	

Single click a request to see the details:

Ø2 Operations				٩
Properties Filters Orders Ord	ier details Ord	er sub-details		
Work orders				
Pequests - all				
	General Audit info			
				Request FM
	Contacts			+ Add
Orders (4)	* Requestor	207033, Bitty, KS Koua Stephane	1	P2 Add sub
▶ 🌒 ► 16675.00, PA, Anderson, Leak from ceiling, 26/04/2017 13:40, 26/04/2017 13:41, 2	On behalf of			Сору
All	On behalf of (text)			Transfer to archive
	Contact email address			Retrieve from archive
	Email required?			1 Total costs
	Location details			Knowledge Base
	* Property	PA, Passfield Hall	1	Colour priority legend
	* Space	122	1	Check for double reques
	Location in room			Ø Repeat
	Details of request			Add communication log
	* Status	 R15, Accepted 	(1)	Status transitions
	Cancellation reason			In progress
	Standard order	RESMM001, Blocked toilet	1	🛱 Show flow diagram
	* Order group	01.15, Residential Maintenance	1	
	* Description	Blocked toilet		Report ^
	Details			Add form
				Report
Count All None			di la	Cancel Save

Scroll down the centre pane to see further details:

	SLA			Add communication log
	TTC Requested completion date Technically completed on	26/04/2017 10:38	(i) (i)	Status transitions In progress Show flow diagram
	Planning Supervisor Start date & time End date & time On hold until	125083, Anderson, RM Richard Richard 26/04/2017 10:38	(* 19 16 16 16	Report • • • • • • • • • • • • • • • • • • •
Count All None	Related order			Cancel Save

Click the arrow or double-click the bell icon to see jobs underneath the request. Select the job (work order) to see its details. Scroll down to see further details.

🤌 02 Operations				٩
Properties Filters Orders Ord	er details Ord			
Work orders				
Requests - all				
Accrued from v = v (1) × Q	General Internal note	s Health & Safety Planning SLA / Costs		Reactive work order
00000	Communication logs /	Audit info		- Add
				면함 Add sub
Orders (4)	General			Add standard sub
▶ Q ► 16675.00, PA, Anderson, Leak from ceiling, 26/04/2017 13:40, 26/04/2017 13:41, 2	* Number	16673.01		Сору
2 Section 2017 10:2	Standard order	RESMM001_01, Blocked toilet	_ (i) (B)	Transfer to archive
10073.01, PA, Maintenance North Gluster, Diocked toilet, 20104/2017 10.30, 2010	* Description	Blocked toilet		Retrieve from archive
	Details			Include order line(s) in
				Include order line(s) in
				1 Total costs
				Copy from internal req
				Reneat
	* Order group	01.15, Residential Maintenance		Repeat suborder withi
	Priority	03-H4, Within 4 hours		Knowledge Base
				Add communication log
	Location			
	* Property	PA, Passfield Hall	1	Status transitions •
	Space	122	1	 Job assigned
	Location in room			Show flow diagram
	Asset ID		.	
	Status			Report ^
	* Status	3 DW25 Planned		Add form
	* All suborders completed	Vac No		Report
	An suborders completed	() 163 () 163		Cancel Save
Count All None	On hold until		1(*0)	Janeer

	On hold reason Cancellation reason			Include order line(s) in
	Service data			 Total costs Copy from internal req
	Trade	RES, Residential Services	10	Colour priority legend
	Supervisor			Ø Repeat
	Internal tradesperson	CL2, Maintenance North Cluster	<i>i</i> 🙂	Repeat suborder withi
	Service provider / supplier		(1)	Knowledge Base
	Contract line			Add communication log
	Requestor			Status transitions
	Requestor	207033, Bitty, KS Koua Stephane	<i>i</i> ()	➡ Job assigned
	On behalf of			Show flow diagram
	External requestor			
	Department			Report ^
				Add form
	Financial data			Report
	Budget			Cancel
Count All None				Cancer Save

Click the Planning tab to see dates:

🤌 02 Operations		٩
Properties Filters Orders Ord	der details Order sub-details	
Work orders		
Requests - all		
Accrued from v = v	General Internal notes Health & Safety Planning SLA / Costs Reactive work order	
00000	Communication logs Audit info	
 Orders (4) Orders (4) Orders (575:00, PA, Anderson, Leak from ceiling, 26/04/2017 13:40, 26/04/2017 13:41, 2 Hofr3:00, PA, Maintenance North Cluster, Anderson, Blocked toilet, 26/04/2017 10: 166/73:01, PA, Maintenance North Cluster, Blocked toilet, 26/04/2017 10:38, 26/0 	Planning C Add sub Planning C 26/04/2017 10.43 C Orpy Start date & time 26/04/2017 10.38 C C Orpy End date & time C C C Orp C C Orpy Duration C C C C C C C C C C C C C C C C C C C	
	Reported on 25/04/2017 14:43 (1) Total costs	
	Ouotation date (%) Marco Copy from internal req	
	Date accepted 25/04/2017 14:43	
	Technically completed on	
	Knowledge Base	

Statuses

These are all the possible statuses of a request (bell symbol) and job (hard hat).

HELPDESK REQUEST		Approx.	REACTIVE WORK ORDER		Approx.
Status	Colour	Symbol	Status	Colour	Symbol
Reported	Red	*	Order reported	Red	*
Follow-Up	Red	➡			
Accepted	Yellow	\checkmark	To be assigned	Yellow	1
			Unplanned	Yellow	2
			Emergency	Yellow	ļ.
			Planned	Yellow	3
On Hold	Yellow	Padlock	On Hold	Yellow	Padlock
			Assigned	Blue	→
In Progress	Blue		In Progress	Blue	
Work Completed	Green	Ω	Work Completed	Green	\checkmark
Feedback Completed	Green	\checkmark			
Cancelled	Grey	Х	Cancelled	Grey	Х
Completed	Grey	\checkmark	Administratively completed	Grey	\checkmark

Raise a Request

On the right-hand panel click Add. (Facilities manager only: Then select Request FM from the drop-down list).

🤌 02 Operations				٩
Properties Filters Orders Ord				
Work orders				
Requests - all				
Accrued from v = v (1) × Q	General Audit info			Request FM
	Contacts			Add
	t Deservation	207022 Pitty I/C Vaus Charless		Add standard
	^ Requestor	207033, Bitty, KS Koua Stephane		만함 Add sub
Section 2017 13:40, 26/04/2017 13:41, 2017 13:40, 26/04/2017 13:41, 2017 13:41, 2017 13:41, 2017 13:41, 2017 10:40, 2017 10:40, 2017 10:40, 2017 10:40, 2017 10	On behair of			Сору
	On behalf of (text)			Transfer to archive
	Contact email address			Retrieve from archive Tatal as at
	Email required?			Copy from internal reque
	Location details			Knowledge Base
	* Property	PA, Passfield Hall	<i>i</i> (1)	Colour priority legend
	* Space			Check for double reques
	Location in room			Ø Repeat
	Details of request			Add communication log
	* Status	* R10, Reported	<i>i</i> :	
	Cancellation reason			
	Standard order			
	* Order group			
	* Description			
	Details			
Count All None			/i	Cancel Save

Mandatory fields

* indicates the field is mandatory. Others fields are optional.

Requestor

This defaults to the current user. To change it, click in the field and start typing the name until a drop-down list appears to select the right person from.

Alternatively click the selector icon 🕑 and search e.g. by Surname

Requestor		×
City v =	v	+ 9
City Code Cost centre Department Vpe First name S Pass number Property Qualifications Space Status Sumame Telephone number Type Work address Workspace type Cost centre.Code Cost centre.Code Cos	Full name Bergsma, WP Wicher Wicher Roses Vendoiro, JR Juan Juan Turekova, D Daria Daria Shengelia, T Tamar Tamara Kamphuis, BW Bregtje Bregtje Wang, H Haiyan Haiyan Low, MM Murray Murray Weldesilassie, A Alebel Alebel Alom, SM Sidratul Sidratul Mckenna, CM Colleen Colleen	First Wich Juar Dari: Tam Breg Haiy Mur Aleb Sidra Collé
li 134553	Alexander, G Galina Galina	Galiı
ا 250739 €	Bond, ST Stephen Steve	Stev
Lange 420245	Vizauer, I Izabela Izabela	Izab
≪ < 27 28 29 30 3 1 32 33 34 35 36	> >>	
ОК	Cancel	

Requesto	r				
Surname	•	Contains	▼ d		× + <
Person typ	e: Requ	estor			
Property					
Property			1	Full name	First
Property Status Code	72		1	Full name Douglas, SK Sarah Sara	First h Sara
Property Status Code & 3280 & 2909	72 79		1	Full name Douglas, SK Sarah Sara Barkema, HG Harm Har	First h Sara ry Harr
Property Status Code 3280 2909 4191	72 79 98			Full name Douglas, SK Sarah Sara Barkema, HG Harm Har Nakamura, SN Shotaro S	First h Sara ry Harr Shotaro Shot
Property Status Code 3280 2909 4191 4018	72 79 98 03			Full name Douglas, SK Sarah Sara Barkema, HG Harm Har Nakamura, SN Shotaro S Gorman, CD Clare Clare	h Sara ry Harr Shotaro Shot e Clarr

Click magnifying glass to search. Then select the person and click OK.

Requ	uestor						
Su	rname	▼ Coi	ntains	•	lil	×	× + 9
🗌 Pe	erson type:	Requesto	r				
● All ● Pre	operty						
Statu	s Code				Full name		First
8	256185				Ndila, N Nach	na Nacha	Nacł
2	200610	337			Dill, J Janina	Janina	Janii
			C	ЭK	Cancel		

On behalf of

Both the requestor and on behalf of will get emails about the progress of the request. You could keep your own name in the requestor field and put the original requestor in On behalf of. Enter or select a person in the same way as for the requestor.

On behalf of (text) & Contact email address

Only use these fields if the requestor is not in the database and so cannot be found in the search. Just type in the person's name and email address.

Email required?

If this is blank or Yes then emails will be sent to Requestor as well as On behalf of and On behalf of (text) if they are filled in.

To suppress the progress emails change from blank to No.

These are the emails automatically sent by Planon

То	Event	Content	
Requestor, On behalf of	Request accepted	Request details, expected completion date/time	NO = don't send
Requestor, On behalf of	Completion date changed	New expected completion date/time	NO = don't send
Requestor	Work completed	Request details, contact details for feedback	

Note: The requestor always receives confirmation that the work is completed even if other emails are suppressed.

II.

Property

Start typing in the building name and select from the drop-down list or use the selector:

Address v Contain	s v	7	<u>× × + </u>
 Properties (6) Residences North Cluster 	General Chara	cteristics Audit info	
 Carr-Saunders Hall Passfield Hall 	General	DA1	
Passfield Hall Annex 1 Passfield Hall Annex 2	* Property code	Passfield Hall Anney 1	
Rosebery House	Parent level	PA. Passfield Hall	
_	Parent level for ben	C	٢
	Туре	Building	(i)
	Status	OF10, In management	(i)
	Benchmarks		
	Code	Name	1
	Nothing found		
	Address data		
	Address	1.7 Endeloigh Place	
	OK	Connel	

Space

If you know the exact room number type it in. Otherwise use the selector.

To see all rooms in the building click on the page numbers 1 2 3 etc. at the bottom:

Asbestos preser 🔻	= •			× + 9
Only show Spaces	which are active on	27/04/2017)	
 Property Complex All 				
G.18a				00
G.19				00
G.20				00
G.20a				00
G.21				00
G.21a				00
G.22				00
0.00				00
(4.73				

Or search by entering part of the room number:

× + <	9
Floor.Floor	
01	
01	
02	
02	
02	
02	
02	
02	
	× × + •

To see all rooms on a floor select Floor.Floor and then click the selector button 🕑 :

Space		×
Floor.Floor	¥ = ¥	
Only show Space	es which are active on 31/05/201	7 🔟
PropertyComplexAll		
Space number	 Name 	Floor.Floor.Cc
(123a)	Shw	01
(123a)		01
(G0.R123)	Riser	00
123	Rm	01
123		01
123		01
123		01

Pick the relevant floor:

Floor		×
Code	Contains	× + 9
Show arch	ived items	
Code	^ Name	
00	Ground Floor	- I.
-00	Lower Ground	
00E	Ground Floor External	
00M	Ground - First Mezzanine	
-00M	Basement - Ground Mezzanine	
01	First Floor	
01E	First Floor External	
	OK Cancel	

Location in room

Add information if needed to help the technician find where the problem is.

Status

This will be set automatically.

Cancellation reason

Only used later, if a request needs to be cancelled.

Standard order

You select from a pre-defined list of request types. Start typing in a key word and select from the drop-down list, or use the selector. Find the closest description you can. You will be able to change the description of the actual request later.

Although this is not a mandatory field, if you don't select a standard order then most of the important information will not be filled in for you.

Question - Which suborders should be added?

Every request requires a related job in order to do the actual work. This is called a suborder because it appears underneath the request.

Planon asks which suborders you want to create. Usually there is just one option and you keep it ticked. Click Continue.

	Question	×
/ea	② Question	
Pa	Which suborders should be added?	
de	Add sub: RESMM001_01, Blocked toilet	
61		
101		
102		
04		
105		
07		
108		
10		
11	Continue Cancel	

Order group

This is filled in automatically by the standard order you selected. The meaning is:

01.15 Residential Maintenance = the job will be allocated to the maintenance team for the relevant cluster.

02.15 Residential FM = it is not a maintenance team job and should be assigned to some other in-house staff.

Anything else = it requires an external contractor.

Description

By default this is the description of the standard order. Change it as required to be more specific to this request.

Details

Add further details about the request. You can use Ctrl-V to paste in text copied from an email or document.

Requested completion date

This is filled in automatically based on the priority that is assigned to the standard order selected. It takes into account working hours. For example if the request is raised in the afternoon and the priority is 4 hours then the completion date will be set to some time in the morning of the next working day.

You can change this default date and time as required. But first save the request, as below otherwise the change you make will not be applied to the related job underneath.

.

Start date & time, End date & time, On hold until, Related order Leave blank

Save the request

Click Save. The new request and its suborder now appear in the list on the left hand side.

The request is in status Accepted and the job is in status Planned.

If the requested completion date is blank this means the standard order does not have a defined priority. You must input a date and time.

Input or change the requested completion date as required. Either overtype directly in the field, or use the calendar icon. You can type in a date as six digits without needing separators e.g. 310817. The time must be in the format HH:MM

Click Save again.

A pop-up asks if you want to apply the change to the suborders. Normally you say Yes.



Duplicate request

Add another request the same as the one you have just created i.e. use the same standard order and the same building and room.

This question appears:



Click Continue. Planon shows you the previous request(s) for the same work in the same room within the past 4 hours:

now double reques		
Description	Contains V	× × + Q
Show related work order	S	
Orders (1) 3 Orders (1) 3 Orders (1)	General Audit info	
	Contacts	
	* Requestor 384084, Ratra, DS Davin	der Davinder 🧃
	On behalf of	
	On behalf of (text)	
	Contact email address	
	Email required?	
	Location details	
	* Property BW, Butler's Wharf Resid	ence (1)
	* Space BUF2809, WC	
	Location in room	
	Details of request	
	* Status R15, Accepted	(1)
	Cancellation reason	
	Standard order RESMM001, Blocked toil	et 🥡
	Close	

Click Close. Now you are back in the new request and you can either click Cancel to abandon it as a duplicate or click Save if it is really a different request.

Assign the job

Select the job

Select the job (also called suborder, work order, job ticket) underneath the request.

If the order group is 01.15 Residential maintenance then the Internal tradesperson will be set to the relevant cluster maintenance team. Scroll down to see this.



When you assign the job it will go to the mobile devices of the people in this team. However you must first set the planned start date:

Add Start date & time

Select the Planning tab. The requested completion date-time is the same as the request itself.

Set an appropriate start date and time based on the current date and time and when the job is expected to be completed by. Either type it in, use the calendar button, orcopy

and paste the requested completion date and time into the start date and time and then adjust it:

Highlight with the cursor

Planning	
Requested completion date-time (user)	28/04/2017 15:00
Start date & time	
End date & time	

Ctrl-C Click in the Start date & time field Crtl-V

Planning	
Requested completion date-time (user)	28/04/2017 15:00
Start date & time	28/04/2017 15:00
End date & time	

Click Save

Although this field is called Start date & time it will appear on the mobile device to the technician as just a date and time without any heading. They will use it to prioritise their jobs.

Add End date and time

This is only necessary if the job makes the room unavailable for the period of the work. This is indicated by "2 FM Minor Works" in the Display type field below. Input the date and time that the work is scheduled to finish.

Display type

Based on the standard order, this is set to "2 FM Minor Works" if the type of work renders the room unavailable for occupation while it is in progress. Otherwise this field is blank. You can change this if necessary i.e. select "2 FM Minor works" to make the room unavailable during the work or blank it out to make it available. The unavailability itself must be input into Reslynx. See the Scheduled works filter in the *Filters* section below.

Set to Job assigned

Click the General tab Note that the current status is Planned:

	Status	
➢ Orders ▲ ዺ ✓ 16679.00, PA1, Maintenance North Clu	* Status	³ RW25, Planned
16679.01, PA1, Maintenance North	* All suborders completed	Yes
Anderson, Leak from ce	On hold until	

In the Status transitions in the right-hand panel there is now the option Job assigned. Click this option.

The status is now changed to Job assigned. This means that it has gone to the devices of the people in the maintenance team.

 ➢ Orders ▲ Arr ► 16679.00, PA1, Maintenance North Clu ▲ 16679.01, PA1, Maintenance North ► Arr ► ► 16675.00, PA, Anderson, Leak from ce 	Status * Status * All suborders completed On hold until	 RW30, Job assigned Yes
--	---	---

Notice that the icon of the request that the job belongs to has also changed. Select the request. Its current status is now In progress:

	Details of request				
Orders	* Ctatua	D20 In progress			
16679.00, PA1, Maintenance North Clu	" Status	 RSU, In progress 			
Au 10070 04 DA4 Maintanana Nadh	Cancellation reason				

Non-maintenance jobs

If the order group is 02.15 instead of 01.15 then the internal tradesperson by default is the FM team for the cluster rather than the Maintenance team. However, the FM team does not have anyone allocated to it in planon and the jobs do not go to any device. So you will need to inform someone to do the work and then update the status when they have done it.

Internal Tradesperson

If required, change this from the FM team to a specific individual (not one of the maintenance technicians). As with the Requestor, just start typing the name or use the selector.

Set to Job assigned

For these non-maintenance jobs you do not need to add the Start date and time. The status transition to Job assigned is already available. Click this. The job is now set to Job assigned and the request it belongs to is set to In progress.

Print job ticket

Note – this will only work if your browser allows pop-ups. Consult IT support if you do not know how to enable this.

If required you can print a job ticket as follows:

Select the job.

At the bottom of the right hand menu, under Report, click Add form.

Ø2 Operation	S				٩
Properties	Filters	Orders	Order details		
Work orders					
Request accep	ted 🔻 🖨				
Acc v = v		General Internal notes	Health & Safety Planning	Reactive work order	~
00000		SLA / Costs Communication	logs Audit info		
		Asset ID	(🖪)	Status transitions	^
⊘ Orders	A, FM North Cluste	Status		Show flow diagram	
 	PA, FM North Clus	* Status 🔹 🕈 RW30, Job as	ssigned 👔	Report	~
▶ 🎕 ► 16679.00, P	A1, Maintenance N	* All suborders c 💿 Yes	No	Add form	
▶ 🤮 ► 16675.00, P ▲ 🍕 ✓ 16673.00, P	A, Anderson, Leak f A, Maintenance No	On hold until	6	Report	
A= 16673.01	DA Maintenance N	On hold reason			

In the Forms pop-up click Report:

Forms				×
Code	▼ Contains	•		× × + <
Show all template for	rms			
Code 0209	Letter / email	Audit info		Report •
	General			Report
	* Name	Job Ticket		Report
	* Form	RM Job ticket (docx)	i	
	Language	ALL, All languages		
	* System code	43		
	Addressee			
	* Addressee	Internal tradesperson	1	
	Copy to			

On the Reporting pop-up scroll down and select RM Job ticket (docx). Click Save as:

Repo	orting				×
Use	r reports System reports				
Co	de 🔻	Contains	•		\times \times $+$ \circ
	Permit to work (hot works) Permit to work (work at height) PPM job ticket (docx) PPM job ticket (HTML) RM Job ticket (HTML) RM job ticket (HTML) Accepted External job ticket Internal job ticket External order allocation - lette	User report Aud General * Name Subtitle Domain Code : Print options	lit info RM Job ticket (doc) MM	;)	User reports Preview report Save as
	Request for guotation - letter	* Print only selecte	Yes	O No	

In the Save as pop-up click OK

Save as				
Save as				
DOCX				•
Delimiter				
;				
Output lin	e break chara	acters a	IS:	
Space				
Include Yes	header No			
	O	ĸ	Cancel	

You can then open the word document and print it.

Contractor jobs

If the order group is anything apart from 01.15 or 02.15 then the standard order you chose is a more specialist job that requires a contractor. The internal tradesperson is not assigned.

It is up to the facilities manager to assign this job to a contractor. They will get an email notifying them that there is a new request requiring their attention.

Completing a Job

Maintenance team

The jobs that have been assigned to the cluster maintenance team are updated by the technicians in that team on their devices, as follows:

- 1. All technicians in the team receive the job in their list of Team Orders.
- 2. As soon as one of them accepts the job it appears in their own list of Jobs Assigned and disappears from the Team Orders.
- 3. When they click Start Work on the device it moves to their own list of Jobs in Progress and sends a message back to Planon.
- 4. Planon receives the message within half an hour and updates the status to In Progress
- 5. When the technician has finished the job they click End Work and it disappears from their list of Jobs in Progress
- 6. Planon receives a message within half an hour and updates the status to Work Completed.

To see the latest updates in Planon click the refresh list icon **O**.

Here is a job that the technician has started. It now shows as status In Progress and the Internal tradesperson shows the individual's name instead of the team:

🤌 02 Operations			
Properties Filters	Orders	Order details	
Work orders			
Request accepted C	General Internal notes H	lealth & Safety Planning	SLA / Costs Commun
	ASSETIU		
 ➢ Orders ▲ ▲ ► 16680.00, PA, FM North Cluste ④ ₦ 16680.01, PA, FM North Clus ▲ ► 16679.00, PA1, Maintenance N 	Status * Status * All suborders completed	 RW40, In Progress Yes 	@ No
 ✓ 16679.01, PAI, A, Mercieca, ✓ 16675.00, PA, Anderson, Leak f ✓ 16675.01, PA, DS, Javangwe 	On hold reason Cancellation reason		
 ▲ ▲ 16673.00, PA, Maintenance No ▲ 166673.01, PA, Maintenance No ▲ 16667.00, CS, Maintenance No 	: Service data Trade	RES, Residential Service	S
 ► ► 16665.00, CS, Maintenance No ► ► 16663.00, CS, Maintenance No ► ■ 16662.00, CS, Maintenance No 	Internal tradesperson	213572, Mercieca, A Alar	n Alan

Non-Maintenance Job

If the Internal Tradesperson is initially set to an FM team instead of maintenance team then once it is in status Job Assigned it is up to the Facilities Manager to set the job to In Progress and then to Work Completed according to the information they receive.

Contractor Job

If the Internal Tradesperson is blank then the Facilities Manager will input the Contractor company in the Service provider / supplier field, and change the status to Job Assigned, In Progress and Work Completed at the appropriate times.

Held Jobs

The technician can temporarily discontinue a job by picking a valid reason e.g. Contractor required, Parts not available, Change of priority. This sends a message to Planon and changes the status to On Hold. It also sends an email to the facilities manager so they can re-assign the job to a contractor or take whatever other action is required.

The facilities manager can also directly change any current job to On Hold in Planon.

Here is a he	eld job:							
Properties Work orders	Filters	Orders	Order de	etails		der sub-de	etails	
Request in p	rogress			General SLA / Cos	Intern	al notes mmunicati	Health ion logs	& Safety Audit info
♥ ●	GH, Maintenance Central Clus NH, Maintenance Central Clus NH, Maintenance Central Clus NH, Maintenance Central Clus HH, Maintenance Central Clus	ster, Nandra, Blocked toilet, 23/ iter, Nandra, Blocked toilet, 10/ iter, Nandra, Blocked toilet, 06/ iter, Nandra, Blocked toilet, 06/ iter, Nandra, Blocked toilet, 17/ iter, Nandra, Blocked toilet, 14/	04/2017 00:00, 2 04/2017 12:00 04/2017 12:00 04/2017 12:00 04/2017 10:46 04/2017 10:45	Location * Property Space Location Asset ID Status	in room	NH, Nor (B.05a),	thumberla Shw WC	nd House
▲ 10053.00, ● 16653.0	11, NH, DJ, Holmes, Nandra, B	ocked toilet, 14/04/2017 10:45	04/2011 10:40	* Status * All subor On hold	rders com until	RW70, Yes	On hold	No

To see any comments added by the technician click the Internal notes tab:

				alls	
Nork orders					
Request in progr	ess		▼ 🔒		
Accrued from y v =	•			General	Internal notes Hea
				SLA / Costs	Communication log
 > Orders ▶ ♦ 16672.00, GF ♦ 16672.00, H 	, Maintenance Central Clu	ister, Nandra, Blocked toilet, 2:	3/04/2017 00:00, 2	Comments Comment	
 > ↓ 16658.00, NH > ↓ 16657.00, NH > ↓ 16656.00, NH 	, Maintenance Central Clu , Maintenance Central Clu , Maintenance Central Clu	ster, Nandra, Blocked tollet, 10 ster, Nandra, Blocked toilet, 06 ster, Nandra, Blocked toilet, 06	5/04/2017 12:00 5/04/2017 12:00 5/04/2017 12:00	Comments More difficu	from Tradesperson: ult than I expected.
▶ 🎕 ► 16654.00, HH ▲ 🎕 ► 16653.00, NH	, Maintenance Central Clu , Maintenance Central Clu	ster, Nandra, Blocked toilet, 1 ster, Nandra, Blocked toilet, 14	7/04/2017 10:46 1/04/2017 10:45		

Click the Communication logs tab to see any further comments:



Click the next level down – Order details and then select Communication logs – orders. This shows a list of the actions taken by the technician on the device:

roperties	5	Filters		Orders 16653.01, I	NH, DJ, Holmes, N	Order details		Order sub-details
Order line	s Answer lines	Quotations	Estimates	Actual costs	Man-hours	Order document	History	Communication logs - order
▼>No f	filter						v (a
All floors	v =		•					8
All floors	* =		•				GØ	•
All floors	nmunication log	s - order.Bus C	Tode		Name			<u></u>
All floors	mmunication log	s - order.Bus C)	Tode		Name START	WORK		Q
All floors	mmunication log unication logs (4 553.01	5 - order.Bus ()	• Tode 1160 1161		Name START_ EHS_CF	WORK IECK_ACCEPTED		Q
All floors	▼ = mmunication logs unication logs (4 553.01 553.01 553.01	s - order.Bus ()	Tode 1160 1161 1162		Name START_ EHS_CH DISCON	WORK IECK_ACCEPTED ITINUE		

Click the Discontinue action to see the reason selected:

🤌 02 Opei	rations										
Properties		Filters		Orders 16653.01, 1	NH, DJ, Holmes, I	Van Order details					
Order lines	Answer lines	Quotations	Estimates	Actual costs	Man-hours	Order document	History	Comr	nunication logs - o	rders	
No filte	r						•		abdunm	Audit info	
All floors	* =		•					9			
00									General		
~ ~									* Code	1162	2
Status Comm	unication logs -	order.Bus	ode		Name		1		Name	DIS	CONTINUE
	ation logs (4)								Project		
≝ ★ 16653.	.01	1	160		START_	WORK			Туре	Com	munication log
🗟 * 16653.	.01	1	161		EHS_CH	HECK_ACCEPTED			Status		
≝ * 16653.	.01	1	162		DISCO	ITINUE			Action	DIS	CONTINUE
≝ * 16653.	.01	1	163		New Ph	oto			Baasan	Con	tractor required
									Reason	Con	inactor required

If the technician took a photo this can be viewed on the New Photo line. Select it and then click the View icon:

Document reference	BaseOrder/32290_16653.01/1163.jpg	
Document (secure)		

Completing a Request

When a technician or facilities manager sets a job to Work Completed then Planon checks if it is the only outstanding job under the request. If it is then Planon also sets the request automatically to Work Completed.

Planon then sends an email to notify the requestor that the request is completed, with a link to a feedback survey.

Below is a request in the status Work Completed. The date it was completed is shown in the Technically completed on field. The job underneath has a green tick, meaning it is also in the Work Completed status.

Ø 02 Operations				
Properties	Filters	Orders	Order details	
Work orders				
No filter Accrued fro ▼ = Accrued fro ▼ = O B B B To P Orders Image: Info77.00, BA, Woodl Image: Info77.01, BA, N, G Image: Info77.01, BA, Mainter Image: Info77.01, BA, E, Date Image: Info77.01, BA, E, Date Image: Info77.01, BA, E, Date	y. Paint wall or area, 26/04 aarwolinski, Woodley, Paint enance South Cluster, Block bud, Woodley, Blocked toiled enance South Cluster, Wood Jimes, Woodley, Blocked toil enance South Cluster, Wood enance South Cluster, Wood bud, Woodley, Blind not wor	V2017 14:16, 10/05/2 wall or area, 10/05/20 ed toilet, 12/04/2017 0 , 26/04/2017 10:44 lley, Blocked toilet, 04 et, 15/04/2017 10:00 et, 24/03/2017 12:10, lley, Blocked toilet, 28 king, 27/02/2017 14:2	General Audit info Details OF request * Status G Cancellation reason Standard order * Order group * Description Details SLA TTC	R35, Work completed RESMM160, Paint wall or area 01.15, Residential Maintenance Paint wall or area
			Requested completion date Technically completed on	10/05/2017 14:11 26/04/2017 14:16

To see just the requests that are in status Work Completed select the filter Request feedback pending:



Although the work is done the requestor has not yet confirmed that the problem is fixed to their satisfaction. Once you have allowed sufficient time for any complaint or follow-up request to be received you can set the requests to fully completed.

Change the filter to Request feedback overdue:

🤌 02 Operations		
Properties	Filters	Orders
Work orders		
Request feedback ov	verdue	▼ 🔒
Accrued fro v =	▼	
© ■ ■ ₽ ₽ ₽		
📂 Orders		
🕨 k 🌚 🖓 🖡 🕹 אאר אנא אין אין אין אין און א	aintenance South Cluster, V	Voodley, Paint wall or area
▶ 🎕 🕸 16651.00, BA, Ma	aintenance South Cluster, V	Voodley, Blocked toilet, 04

This shows only the requests that were set to Work Completed at least 5 days ago. It is now safe to set these to a final completed state.

Set multiple requests to Completed

Select any request in the list and click the All button at the bottom. This will select the whole list:

🤌 02 Operatio	ns		
Properties	Filters	Orders	Order de
Work orders			
Request feed	lback overdue	⊻ (B)	
Accrue v =	•	× <	
	9 🖪		
Orders (2)		1	
⊿ 🔩 🕫 16677.00, ⊿ 🔩 🕫 16651.00,	BA, Maintenance South Clu BA, Maintenance South Clu	ster, Woo… ster, Woo…	
Count All	None		

Click the button Action on selection:

Ø2 Operations		
Properties	's Orders	Order details
Work orders		
Request feedback overdue	× 🔒	
Accru v = v		
		Multiple Orders selected
📂 Orders (2)		
▲ 🤹 🕸 16677.00, BA, Maintenance	South Clust	Modify within selection
Count All None		Action on selection

Then click the action Completed.



A confirmation question pops up. Click OK.

Then a warning pops up that the suborders will be changed to Administratively completed. This is correct, so click Continue for all.



Set one request to Completed

To set just one request at a time to Completed, select it and click the Completed action in the right-hand panel:

🤌 02 Operations							
Properties	Filters	Orders	Order details	Order sub-details			
Work orders							
Request feedback of	overdue		* 🔒				
Accrued from year • =	Ŧ			General Audit	info		Status transitions
00000000)			Contacts			 Follow Up Feedback Comp
📂 Orders				* Requestor	389107, Cory, AJ Ashley Ashley	<i>i</i> •	g Completed
▶ 🎕 🕸 16677.00, BA, M	laintenance South Clus	er, Woodley, Paint wall or area, 2	6/04/2017 14:16, 10/05/2017 1	On behalf of			Show flow diag
▶ 📌 🕫 16651.00, BA, M	laintenance South Clus	ter, Woodley, Blocked toilet, 04/04	/2017 16:39, 05/04/2017 10:35	On behalf of (text)			
				Contact email add.			Report

A warning about the status of the suborder pops up. Click Continue.

Show completed requests

After you have set the requests to Completed refresh the list with the Refresh icon:

Then select the filter Request closed:

🤌 02 Operations			
Properties	Filters	Orders	Order details
Work orders			
Request closed			▼ 🔒
Accrued from year v =	Ŧ		
0 8 8 6 8 9			
📂 Orders			-
🕨 🎕 🖬 16677.00, BA, Mair	ntenance South Cluster, Wood	lley, Paint wall or area, 28/04/20	17 13:24, 10/05/2017 1
▶ 🤮 🗹 16651.00, BA, Mair	ntenance South Cluster, Wood	lley, Blocked toilet, 28/04/2017 1	3:24, 05/04/2017 10:35

and

To see the jobs as well as the requests click the Show related orders icon then open up the requests to see the jobs below them:

🤌 02 Operation	s			
Properties	Filters	Orders	Order details	
Work orders				
Request closed			v 🔒	
Accrued from year	r = •			General Internal notes Health & Safety Plann
	A			SLA / Costs Communication logs Audit info
	G			
📂 Orders (4)				Status
⊿ 🧟 🖬 16677.00, B	A, Maintenance South Clu	ister, Woodley, Paint wall or area	a, 28/04/2017 13:24, 10/05/2017 1	* Status Ø RW90, Administratively completed
<u>9</u> 16677.01, 16651.00 B	BA, N, Garwolinski, Woo A Maintenance South Clu	dley, Paint wall or area, 10/05/20 ister Woodley, Blocked toilet, 28	017 14:13, 10/05/2017 14:13 (10/0 8/04/2017 13:24, 05/04/2017 10:35	* All suborders co 💿 Yes 💿 No
→ 16651.01,	BA, DJ, Holmes, Woodle	y, Blocked toilet, 05/04/2017 10:	35	On hold until
				On hold reason
				Concellation road

The status of the request is Completed and the job is Administratively completed. This is now a historic item. Any further work requires a brand new request.

Follow-up a Request

If the requestor is not satisfied that the job is properly completed then change the status from Work Completed to Follow-up instead of Completed. Click the Follow Up option in the right-hand menu:

Ø 02 Operations	s					
Properties	Filters	Orders	Order details	Order sub-details		
Work orders						
Request closed			v â			
Accrued from year •	· = •			General Audit info		Transfer to archive Retrieve from archive
000000	0			Contacts		1 Total costs
 ➢ Orders ♀ 16682.00, BV ♀ 16681.00, BV ♀ 16664.00, BA ♀ 16652.01, BA ♀ 16655.00, BA ♀ 16530.01, BA ♀ 16530.01, BA 	W, FM South Cluster, Woodl W, Maintenance South Clust A, Maintenance South Clust A, Maintenance South Clust A, E, Daoud, Woodley, Blod A, DJ, Farrell Woodley, Blod D, JL Farrell Woodley, Blod	ey, Window broken, 01/05/2017 ar, Woodley, Blocked toilet, 01/0 r, Woodley, Paint wall or area, 2 r, Blocked toilet, 12/04/2017 0 ed toilet, 26/04/2017 10.44 w, Woodley, Blocked toilet, 28/0 cked toilet, 15/04/2017 0.80 0, 1 ked toilet, 16/04/2017 12.10.3	12:00 5/2017 10:11 8/04/2017 13:24, 10/05/2017 1 21 4/2017 13:24, 05/04/2017 10:35 6/04/2017 00:00, 27/02/2017 1 9/2017 12:10 - 27/02/2017 12:	* Requestor 389 On behalf of 0 On behalf of (lext) Contact email add Email required? Location details * Property BA	107. Cory. AJ Ashley Ashley () () () () () () () () () () () () ()	Copy from internal req Knowledge Base Colour priority legend Check for double requ Repeat Add communication log Status communications
► 16531.00, B/	A Maintenance South Cluster A, E, Daoud, Woodley, Blind	r, Woodley, Blocked toilet, 28/0 not working, 27/02/2017 14:20,	4/2017 12:23, 27/02/2017 12:00 27/02/2017 14:20 (27/02/2017	* Space (GO	67), WC	 Follow Up ✓ Feedback Completed i Completed
						Show flow diagram

Then click Add sub to add a new job under the request:

Ø 02 Operations						٩
Properties Filt	orders	Order details	Order sub-detail			
Work orders						
Request closed		v 🔒				
Accrued from year v =	Ŧ		General Audit	info		Request FM ^
			Contacts			륨 Add
📂 Orders			* Requestor	389107, Cory, AJ Ashley Ashley	10	Add standard
► Q < 16682.00, BW, FM South	Cluster, Woodley, Window broken, 01/05/2017	12:00	On behalf of			Copy Add sub
 Q 16661.00, BVV, Maintenan Q 16677.00, BA, Maintenan 	ce South Cluster, Woodley, Blocked tollet, 01/0 ce South Cluster, Woodley, Paint wall or area.	28/04/2017 13:24. 10/05/2017 1	On behalf of (text)		_	Transfer to archive
▶ 🍓 ► 16664.00, BA, Maintenan	e South Cluster, Blocked toilet, 12/04/2017 08	8:21	Contact email add.			Retrieve from archive
9 16652.01, BA, E, Daoud, 1	Woodley, Blocked toilet, 26/04/2017 10:44		Entail requireu?			Copy from internal reg
All 16651.00, BA, Maintenand M	e South Cluster, Woodley, Blocked toilet, 28/0 Woodley, Blocked toilet, 15/04/2017 08:00	14/2017 13:24, 05/04/2017 10:35	Location details			Knowledge Base
H 16532.01, BA, DJ, Farrell,	Woodley, Blocked toilet, 13/04/2017 12:10, 3'	1/03/2017 12:10, 27/02/2017 12:	* Property	BA, Bankside House	10	Colour priority legend
▲	ce South Cluster, Woodley, Blocked toilet, 28/0	4/2017 12:23, 27/02/2017 12:00	* Space	(G067), WC	1	Check for double requ
	II, Woodley, Blocked toilet, 27/02/2017 12:00	1	Location in room			Ø Repeat
	Noodley, Blind not working, 27/02/2017 14:20,	27/02/2017 14:20 (27/02/2017	Details of request			Add communication log

Pick the standard order and click Save. There is now a new job under the request in the Planned status:

🤌 02 Operations								
Properties	Filters	Orders	Order details					
Work orders		, 						
Request closed			v 🔒					
Accrued from year v =	*			General	Internal notes	Health a	& Safety	Pla
00000	I			SLA / Costs	Communicat	tion logs	Audit in	fo
				Order grou	u, r	kesiueniiai r	พลแนะแลก	.e
ờ Orders				Priority	03-H4, \	Within 4 hou	ırs	
 ▶ २२ ४ 16682.00, BW, FM ▶ २२ ४ 16681.00, BW, Mair 	South Cluster, Woodley, ntenance South Cluster,	Window broken, 01/05/2017 1 Noodley, Blocked toilet, 01/05	2:00 /2017 10:11	Location				
🕨 🍕 🖬 16677.00, BA, Main	tenance South Cluster, V	Voodley, Paint wall or area, 28	/04/2017 13:24, 10/05/2017 1	* Property	BA, Ban	kside House	e	
▶ 🎕 ► 16664.00, BA, Main	tenance South Cluster, E	locked toilet, 12/04/2017 08:2	1	Space	(G067),	WC		
3 16652.01, BA, E, Da	aoud, Woodley, Blocked	oilet, 26/04/2017 10:44	2017 12:24 05/04/2017 10:25	Location in	n room			
• an 16551.00, BA, Maintenance South Cluster, Woodley, Blocked toilet, 28/04/2017 13:24, 05/04/2017 10:35					Asset ID			
→ 16532.01, BA, DJ, F	Farrell, Woodley, Blocked	toilet, 24/03/2017 12:10, 31/0 /oodlev Blocked toilet 28/04/	03/2017 12:10, 27/02/2017 12: 2017 12:23, 27/02/2017 12:00	Status				
🤌 a 16531.02, BA, Ma	intenance South Cluster	Woodley, Blocked toilet, 28/0	4/2017 12:23, 01/05/2017 12:	* Status	3 RW25, F	Planned		
	, Farrell, Woodley, Block	ed toilet, 27/02/2017 12:00		* All subord	ers co 💿 Yes		No	
<i>9</i> ● ● 16529.01, BA, E, Da	aoud, Woodley, Blind not	working, 27/02/2017 14:20, 2	7/02/2017 14:20 (27/02/2017	On hold ur	ntil			

Assign this new job in the normal way as per the section **Assign the job**.

Cancel a Request

Instead of completing a request it could be closed by cancellation instead. This will also cancel the job underneath. A reason must be provided.

If a request is already in the status In Progress it can only be cancelled by the facilities manager.

Select a request in the status Accepted. In the Cancellation reason field click the selector icon.

🤌 02 Operations					
Properties	Filters	Orders	Order details		
Work orders					
Request feedback	overdue		• Ê		
Accrued from year •	- ,	,		General Audit info	
				Location in room	
	, E, Daoud, Blocked to , Nandra, Toilets & Sh	ilet, 24/04/2017 11:39, 24/04/2017 ower Fittings- SPECIFY DETAILS,	7 11:39, 24/04/2017 11:40 (24/04/2017 24/04/2017 11:39, 24/04/2017 12:00 (2	Details of request	
► • • • • • • • • • • • • • • • • • • •	Maintenance Central C Maintenance Central C	uster, Nandra, Blocked toilet, 24/0 uster, Nandra, Blocked toilet, 21/0	94/2017 11:31, 24/04/2017 11:31 (24/04 94/2017 15:24, 28/04/2017 14:00, 21/0	Cancellation re	

Select one of the three reasons:

Cancellatio	on reason	×
Code	Contains V	× + Q
Code 01	^ Name Duplicate	
02 03	Cancelled by customer Cancelled by FM	
	OK Cancel	

Answer Continue to the Question that pops up. This will add the cancellation reason to the job as well.

Click Save.

Now the Cancelled option appears on the right-had menu. Click this:

Ø 02 Operations					٩
Properties	Filters	Orders	Order details		
Work orders					
Request feedback over Accrued from year =	rdue		* Ê • X Q	General Audit info	 Check for double requ Repeat
 E E	ntenance Central Cluster, Na , Daoud, Blocked toilet, 24/04 andra, Toilets & Shower Fittin ntenance Central Cluster, Nat	ndra, Blocked toilet, 23/04/2 /2017 11:39, 24/04/2017 11 gs- SPECIFY DETAILS, 24/ ndra, Blocked toilet, 24/04/2	017 00:00, 24/04/2017 11:39, 24/0 39, 24/04/2017 11:40 (24/04/2017 04/2017 11:39, 24/04/2017 12:00 (2 017 11:31, 24/04/2017 11:31 (24/04	Location in room Details of request Status R15, Accepted Canceliation re 03, Cancelled by FM	Add communication log Status transitions In progress Cancelled Pow Bow disaram

A Warning appears that the suborders will be changed to Cancelled. Click Continue.

Both the request and the job are now Cancelled and cannot be changed:

🤌 02 Operations	;				
Properties	Filters	Orders	Order details		
Work orders					
Request feedba	ck overdue		¥	Ê	
Accrued from year	• = •	9	General Audit info		
					Location in room
✓ 🐋 16670.00, HH, Maintenance Central Cluster, Nandra, Blocked toilet, 21/04/2017 15:24, 28/04/2017 14:00, 21/0					Details of request
⊘× 16670.01, HH, Maintenance Central Cluster, Blocked toilet, 21/04/2017 15:24, 21/04/2017 15:28 (21/04/2017					

The requestor receives an email that the job was cancelled for the reason selected.

Viewing the List

This section shows you different ways of viewing and finding the requests and jobs.

Each request or job in the list shows some of the key information:

🤌 02 Operations			
Properties Passfield Hall, London	Filters	Orders	Order details
Work orders			
Requests - all			T 🔒
Accrued from yea • =	•		
0 8 8 4 8 6)		(
📂 Orders			
🔺 🐋 🗸 16679.00, PA1,	Maintenance North Clus	ter, Anderson, Blocked toilet,	28/04/2017 08:27
<i>.</i> ⊘ ₃ 16679.01, PA	1, Maintenance North Cl	uster, Anderson, Blocked toile	t, 28/04/2017 09:41
▶ 🎕 ► 16675.00, PA, A	Anderson, Leak from ceili	ing, 26/04/2017 13:40, 26/04/2	2017 13:41, 26/04/2017 13:4
▶ 🎕 ✓ 16673.00, PA, N	Maintenance North Clust	er, Anderson, Blocked toilet, 2	6/04/2017 10:38, 26/04/2017

- Job number. This is automatically generated. A request number ends in .00. A suborder has the same number as the request it belongs to except that it ends in .01, .02 etc.
- Property code of the building
- Internal tradesperson for in-house maintenance jobs this is the name of the maintenance team until the work is started. Then it is the name of the technician doing the work.
- Supervisor. This is normally the facilities manager of the relevant cluster.
- Description
- Requested completion date.

Select Properties

If a specific building is selected this shows under the Properties heading, and only the orders for that building are shown in the list:

Properties Filters Orders	02 Operations			
Passfield Hall, London	Properties Passfield Hall, London	Filters	Orders	

To clear this, click the Properties heading and select all Properties.

🤌 02 Operations				
Properties	Filters	Orders	Order details	
Properties	_			
No filter				• 8
Asbestos Free? •	- •		C.	× Q
088				
Noperties				
Residences North	n Cluster, London			
🙇 Carr-Saunders	Hall, London			
 Passfield Hall, 	London			
Rosebery Hous	se, London			

Then return to Orders:



Filters

Select any of the in-built filters from the drop-down list. Select a "Request" filter to show just requests or a "Job" filter to show just the sub-orders. Many of them restrict the list further to requests or jobs in a particular status.

🤌 02 Operations			
Properties	Filters	Orders	Order details
Work orders			
No filter Completion withi Install salto lock Job closed Job completed Jobs - all Jobs - not finish Job with helpdes Job with supervi Job with technic Missing planned Request closed Request feedbac Request feedbac	n in 1 hour ed k sor ian date/time ed k given k overdue k pending		▼ (È)

Toggle the filter on and off by clicking the filter icon:

If a "Request" filter is on you cannot open up the jobs underneath the requests:

🤌 02 Operations			
Properties	Filters	Orders	Order details
Work orders			
Request accepted			× 🔒
Accrued from yea • =	Ŧ		
🃁 Orders			
🔺 🍕 🗸 16679.00, PA1,	Maintenance North Clus	ter, Anderson, Blocked toile	t, 28/04/2017 08:27
🕨 k 🍕 🗸 16673.00, PA, N	Maintenance North Cluste	er, Anderson, Blocked toilet,	, 26/04/2017 10:38, 26/04/2017
▶ 🮕 ✓ 16659.00, CS, \	Warriner, Blocked toilet,	10/04/2017 12:00	

You can click the Show related orders icon to enable the suborders to be viewed, or else turn off the filter.

🤌 02 Operatior	15					
Properties	Filters	Orders	Order details			
Work orders						
Request accept	oted		▼ 🔒			
Accrued from yea	• = •					
0 8 6 6 8						
🃂 Orders						
⊿ 🮕 ✓ 16679.00, F	PA1, Maintenance North C	Cluster, Anderson, Blocked toi	ilet, 28/04/2017 08:27			
⊘ ₃ 16679.01	, PA1, Maintenance North	Cluster, Anderson, Blocked	toilet, 28/04/2017 09:41			
▶ 🝕 ✓ 16673.00, PA, Maintenance North Cluster, Anderson, Blocked toilet, 26/04/2017 10:38, 26/04/2017						
▶ 🮕 🗸 16659.00, (CS, Warriner, Blocked toile	et, 10/04/2017 12:00				

Select the Scheduled works filter. This shows a list of all the jobs with Display type 2, Minor works, indicating that the room is unavailable while the job is in progress. With this filter on, run a report to list the jobs and input the unavailable periods into Reslynx. This is described at the end of the section *Guest Check In – Maintenance Issue* below.

Show list

Click the Show list icon to show the information in separate columns. Then drag the borders between the column headings to make the columns narrower or wider and show more information:

Properties		Filters	Orde	rs	Order details
Work order	s				
T Requ	lest accepted				▼ 🔒
Accrued fr	rom yea 🔻 =	v			
S 🖬 🗊	Proper In	te Internal tradespers	Supervisor.Si	uDescription	Start date & End c
S 🗊 🗊 Number Orders (2	Co 😯 💽 Proper In 3)	te Internal tradespers	Supervisor.Si	u]Description	Start date &End c
3 🔒 🗊 Number Orders (1 16679.00	Proper In 3) PA1	te Internal tradespers Maintenance North	Supervisor.St	u. Description Blocked toilet	Start date &End c
3 (2) (2) Number Orders (2) 16679.00 16673.00	 Proper In PA1 PA 	te Internal tradespers Maintenance North Maintenance North	Supervisor.So Anderson Anderson	J Description Blocked toilet Blocked toilet	Start date & End o

Sorting

You can now sort the list by clicking on any column heading. For example, Requested completion:

🤌 02 Op	erations	5								
Properties			Filters	Order	.2	Order			der sub-	
Work order	s									
Requ	iest accept	ed							Ŧ	Ê
Internal tr	adespersor	n v :	=	T						9
Number	Proper	Inte	Internal tradespers	Supervisor.Su	Description	Start date &	End date &	Requested c	omple	Status
Number Ø Orders (2	Proper 20)	Inte	. Internal tradespers	Supervisor.Su	IDescription	Start date &	End date &	Requested c	omple	Status
Number Ø Orders (2 16666.00 16666.01	Proper 20) CS	Inte	. Internal tradespers Maintenance North	Supervisor.Su	Remove dust	Start date &	End date &	Requested c	omple	Status
Number Orders (2 16666.00 16666.01 16655.01	Proper 20) CS CS CS	E	Internal tradespers Maintenance North FM North Cluster Daoud	Supervisor.Su	Remove dust Remove dust Blocked toilet	Start date &	End date &	Requested c	omple	Status
Number Orders (2 16666.00 16666.01 16655.01 16659.00	Proper 20) CS CS CS CS CS	E	Internal tradespers Maintenance North FM North Cluster Daoud	Supervisor.Su Anderson Warriner	Remove dust Remove dust Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c 06/04/2017 10/04/2017	tomple 10:47 12:00	Status
Number Ø Orders (2 16666.00 16665.01 16659.00 16659.01	Proper 20) CS CS CS CS CS CS	E	. Internal tradespers Maintenance North FM North Cluster Daoud	Supervisor.Su Anderson Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date &	Requested c 06/04/2017 10/04/2017 10/04/2017	10:47 12:00 12:00	Status
Number Crders (. 16666.00 16665.01 16659.00 16659.01 16661.00	Proper 20) CS CS CS CS CS CS CS	E	. Internal tradespers Maintenance North FM North Cluster Daoud	Supervisor.Su Anderson Warriner Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c 06/04/2017 10/04/2017 10/04/2017 10/04/2017	10:47 12:00 12:00 12:00	Status
Number Crders (; 16666.00 16665.01 16659.00 16659.01 16659.01 16661.00 16661.01	Proper 20) CS CS CS CS CS CS CS CS	E	. Internal tradespers Maintenance North FM North Cluster Daoud	Supervisor.Su Anderson Warriner Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c	10:47 12:00 12:00 12:00 12:00	Status
Number Corders (; 16666.00 16665.01 16655.01 16659.00 16659.01 16661.00 16661.01 16662.00	Proper 20) CS CS CS CS CS CS CS CS CS	E	Internal tradespers Maintenance North FM North Cluster Daoud Maintenance North	Supervisor.Su Anderson Warriner Warriner Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c	10:47 12:00 12:00 12:00 12:00 12:00	Status
Number Corders (; 16666.00 16665.01 16655.01 16659.00 16659.01 16661.00 16661.01 16662.00 16662.01	Proper 20) CS CS CS CS CS CS CS CS CS CS CS	E A	Internal tradespers Maintenance North FM North Cluster Daoud Maintenance North Mercieca	Supervisor.Su Anderson Warriner Warriner Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c 06/04/2017 10/04/2017 10/04/2017 10/04/2017 10/04/2017 10/04/2017	10:47 12:00 12:00 12:00 12:00 12:00 12:00	Status
Number Corders () 16666.00 16665.01 16655.01 16659.01 16661.00 16661.01 16662.00 16662.01 16663.00	Proper 20) CS CS CS CS CS CS CS CS CS CS CS	E A	Internal tradespers Maintenance North FM North Cluster Daoud Maintenance North Mercieca Maintenance North	Supervisor.Su Anderson Warriner Warriner Warriner Warriner	Remove dust Remove dust Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet Blocked toilet	Start date & 06/04/201	End date & 06/04/201	Requested c 06/04/2017 10/04/2017 10/04/2017 10/04/2017 10/04/2017 10/04/2017 10/04/2017	10:47 12:00 12:00 12:00 12:00 12:00 12:00 12:00	Status

Click Show tree to return to the default view.

Search

To search for a specific request use Ctrl-space and type in the number, excluding the .00:

Find orde	r number		×
16673			
	ОК	Cancel	

You will then just see the request and any jobs underneath it:

🤌 02 Operation	าร		
Properties	Filters	Orders	Order details
Work orders			
Request acce	pted		• 🗎
Accrued from yea	v = v		
Orders (2)			
⊿ 🐋 ✓ 16673.00,	PA, Maintenance North Clust	er, Anderson, Blocked toilet, 2	6/04/2017 10:38, 26/04/2017
93 16673.0 1	I, PA, Maintenance North Clu	ster, Blocked toilet, 26/04/201	7 10:38, 26/04/2017 10:43 (2

To see the whole list again click Refresh list

To search on any other fields, where there is not a specific filter use the search facility:



If searching for a person you need to pick them from a list using the selector – In the selector, find them by surname for example:

Internal tra	desperson		×
Surname	 Contains 	▼ daoud	× × + Q
Show archiv	ed items		
Person type	Internal tradesperse	on	
Status Code		Full name	First
着 228188	}	Daoud, E Elias E	lias Elias
		OK Cancel	

The list now only shows jobs for this tradesperson:

Ø2 Operations									
Properties		Filters	Orders		Order	details		der sub-d	letails
Work orders									
Request accepte	d							v (A
Internal tradesperson	v =	,	228188, Dao	ud, E Elias Elias				6 8	0
	•								
Number Proper	. Inte I	nternal tradespers S	upervisor.Su	Description S	Start date &	End date &	Requested	comple	Status
Orders (1)									
16655.01 CS	E	Daoud	Anderson	Blocked toilet (06/04/201	06/04/201	06/04/2017	10:47	<u>@</u>

Click \boxtimes to clear the search and show the full list again.

Guest Check In – Maintenance Issue

When a guest checks in you should check the current status of any maintenance work in progress or planned for their room. This involves three actions introduced above: filter, show list and sort.

Start from the list of Orders for the relevant building and select the filter Jobs – not finished:

🤌 02 Operations				
Properties Rosebery Hall, London	Filters	Orders	Or	der details
Work orders				
Jobs - not finished			v 🔒	
Accrued from y v =	•			
Orders (10)				
	8, Maintenance North	Cluster, Anderson, Dama	aged window frame, 2	-
→ 16/83.01, RA, CC	DNFERENCE 1, A, Me	ercieca, Anderson, Investi	gate Room light out,	
	2, Maintenance North 2 FT01) Lift Housel	keeping North Cluster An	derson Faulty light in	
@3 16753.00, RA, (II	derson Faulty light in	lift car 15/05/2017 12:4	l	
A 16741.01, RA. (1F	RF.LOB01), Lob. Gil. 1	No hot water to sink. 20/0	-)5/2017 00:00. 20/05/	
16741.02, RA, (1F	RF.LOB01), Lob, Gil, I	No hot water to sink, 19/0	,)5/2017 00:00, 19/05/	
🧀 16741.03, RA, (1F	RF.LOB01), Lob, Gil, I	No hot water to sink, 20/0	5/2017 00:00, 20/05/	
	R.U30), F-Bath, Maint	enance North Cluster, An	derson, Blocked toilet	
🥬 + 16725.01, RA, (78	32A), Housekeeping N	lorth Cluster, Anderson, L	ight left on, 05/06/201.	

Click the Show list <sup>
button.</sup> Find and click the Space.Space number column heading. This sorts the list in room number order. If the guest's room has any jobs in the list select each one to see the details:

<i> 02</i> Op	eration	5							
Properties Rosebery Ha	ill, London	Filters	Orders	0	rder details	Orde			
Work order	rs								
Jobs	- not finish	ied		v 🔒					
Accrued f	rom y ▼ =	Ŧ			General	Internal no	tes Health & S	Safety Planning	SLA / Co
000		a			Communie	ation logs	Audit info		
Number	Proper	Space.Space number	 Space.Name In 	ternal trade Internal	tra * Number Standard	order	16768.01 RESMM008_0	11. No hot water to s	sink
16753.00	RA				* Descriptio	n	No hot water t	to sink	DITIK
16741.01	RA	(1RF.LOB01)	Lob		Descriptio	n	NO HOL WALEFT	IU SILIK	
16741.02	RA	(1RF.LOB01)	Lob		Details				
16741.03	RA	(1RF.LOB01)	Lob		No water	coming out o	f hot tap at all		
16755.00	RA	(1R.LFT01)	Lift	Houseke	eet				
16732.01	RA	(1R.U30)	F-Bath	Mainten	ian				
16768.01	RA	342		Mainten	nan				
16786.01	RA	468		Mainten	ian				
16725.01	RA	(782A)		Houseke	ee; * Order gro	up	01.15, Reside	ntial Maintenance	
16783.01	RA	CONFERENCE 1	A	Merciec	a Priority		06-D2, Within	2 working days	
					Location				
					* Property		RA, Rosebery	Hall	
					Space		342		
					Location i	n room	ensuite		

Alternatively you can create a report of all the rooms in the filtered list. Click the

Report button Report in the right hand menu. Under the list of reports on the righthand side click to go to the last page. Find and select the report Start and End Dates. Click Save as in the right hand menu and select PDF, XLSX etc.

User reports System reports		
Code 🔻 Conta	ins 🔻	× × + Q
Audit by Completion Date	User report Audit info	User reports ^
All fields of all order types Recip - User account (Orders S	General	Preview report
Basic request Target date will be missed	* Name Start and End Dates	Carlo das
Recip - stores issuer and reque Recip (Orders) - Residences m	Domain	
Recip - Req / On behalf / Cont	Code	
Times for jobs - target date orc	Print options * Print only se Yes No	
Times for jobs by work order gr Times summary by work order	* Print drill-do Yes No	
Times summary by tradesperso Start and End Dates	* Print user na Yes No	
	* Print use an Tes INO	Cancel Save