Residences Supervisor User Guide

Summary of Roles in Planon

Helpdesk
Raise requests
Assign jobs to in-house team
Review progress of requests and jobs
Cancel requests
Complete requests
Follow up requests

Supervisor
Review progress of jobs
View comments, history and actions
Put jobs on hold
Assign jobs for contractors
Create jobs
Deal with jobs on hold
Set jobs to completed
Cancel jobs
Run reports

Operational administrator
Define standard orders
Change default supervisors and tradespersons for order groups
Update maintenance teams
Update telephone and email of buildings
Change asset manager of clusters

Systems administrator
Upload student records
Change user authorisations for Planon and PMFS
Create filters for general use
Create reports
Deal with system issues

Terminology

Order

Request	aka Request FM, Service call, Logged call, Reported fault / problem …
Job	aka Work order, Reactive work order, Job instruction, JI, Job ticket …

Getting started
Please refer to the first two sections – Log In and Reactive Maintenance – of the Residences Helpdesk User Guide.

View and Search the Requests and Jobs
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:

- 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:
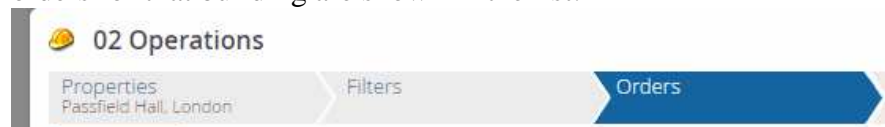
To clear this, click the Properties heading and select all Properties, or one cluster.
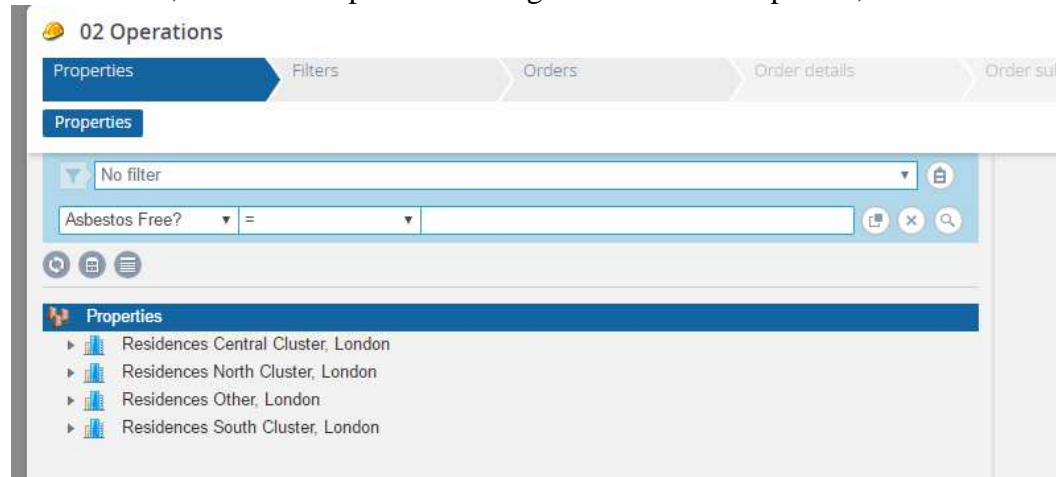
Then return to Orders:
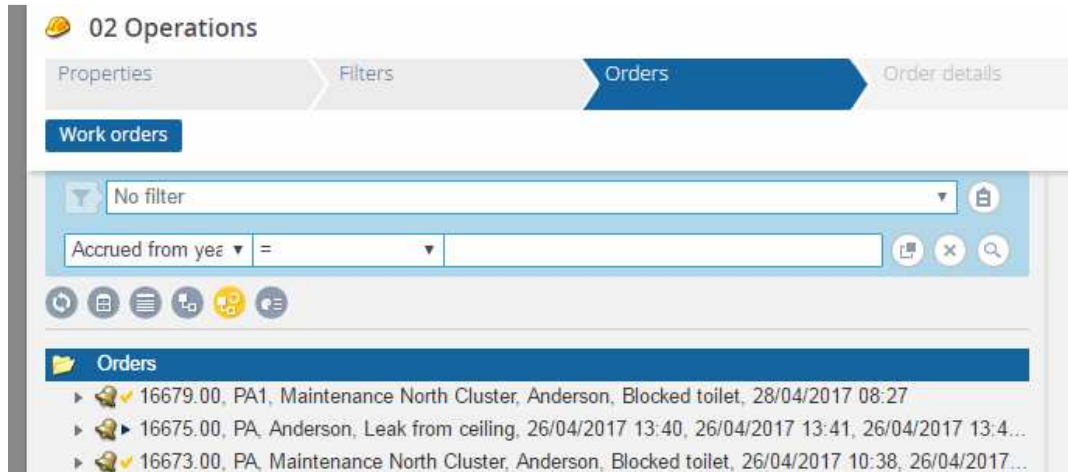
Filters

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.

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

If a "Job" filter is on you cannot see the requests that they belong to. In order to see these click the Show related orders icon :
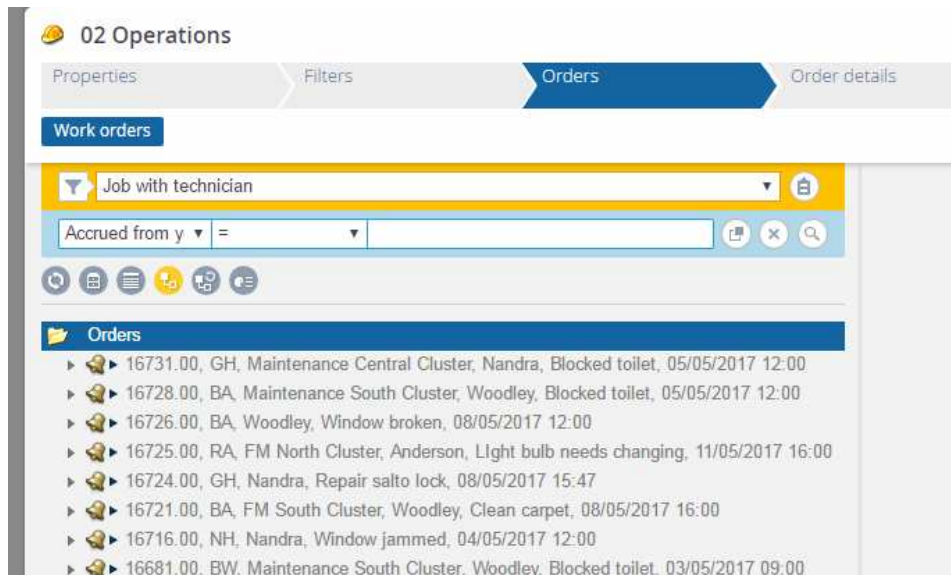
This shows the related requests. You can open each request to see the sub-orders beneath it that meet the filter condition:
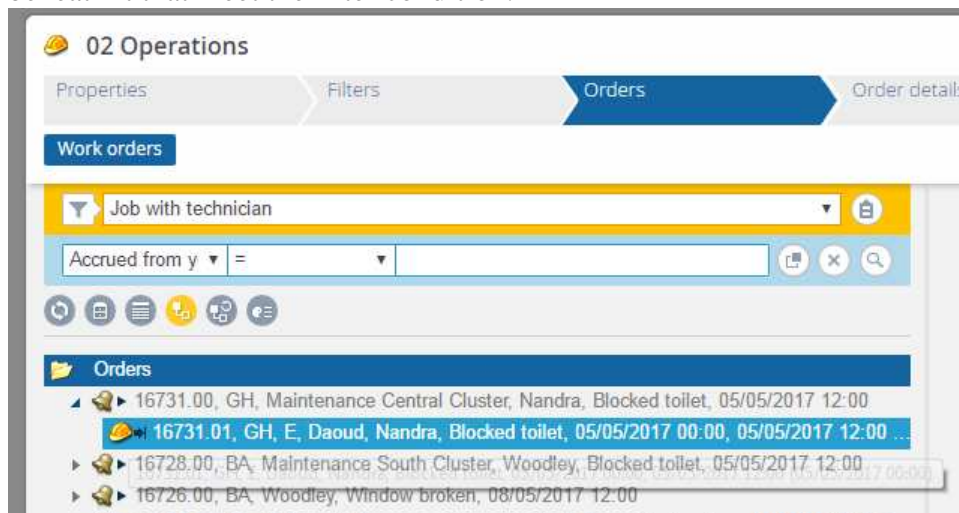
Show list

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:

Sorting

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

Click Show tree ⊞ to return to the default view.

Search

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

Find order number

16673

OK   Cancel
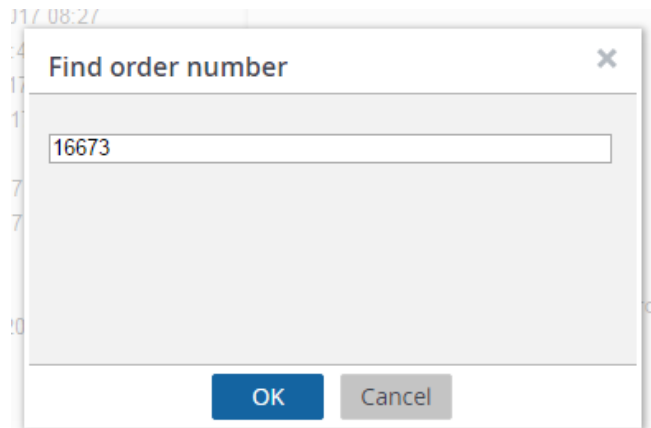
You will then just see the relevant request and any jobs underneath it:
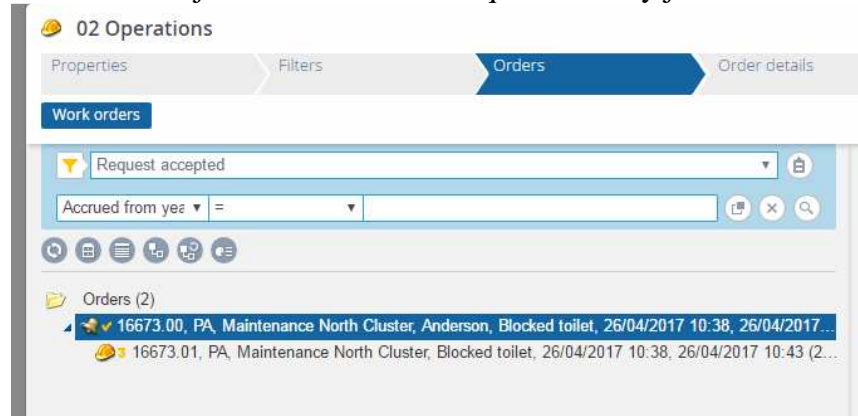
To see the whole list again click Refresh list .

To search on any other fields, where there is not a specific filter use the search facility:
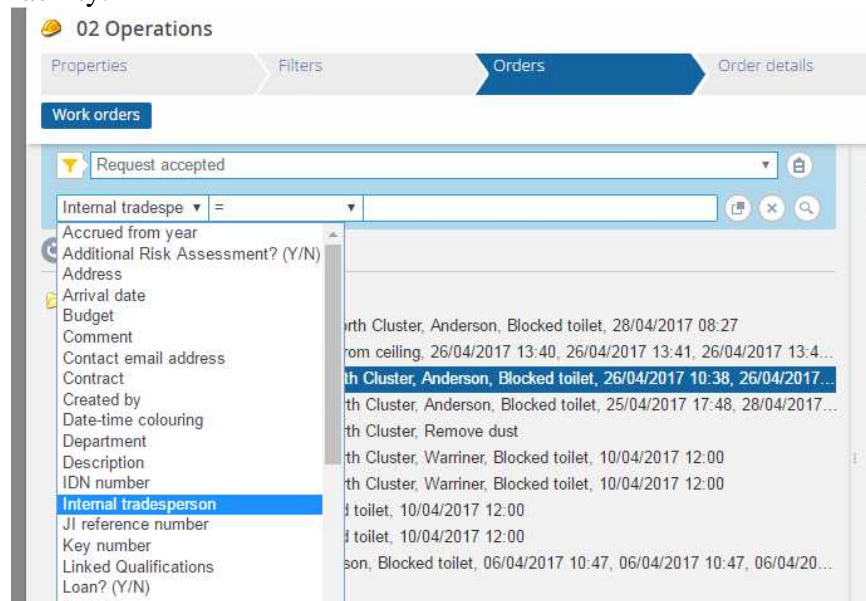
If searching for a person you need to pick them from a list using the selector
In the selector, find them by surname for example:
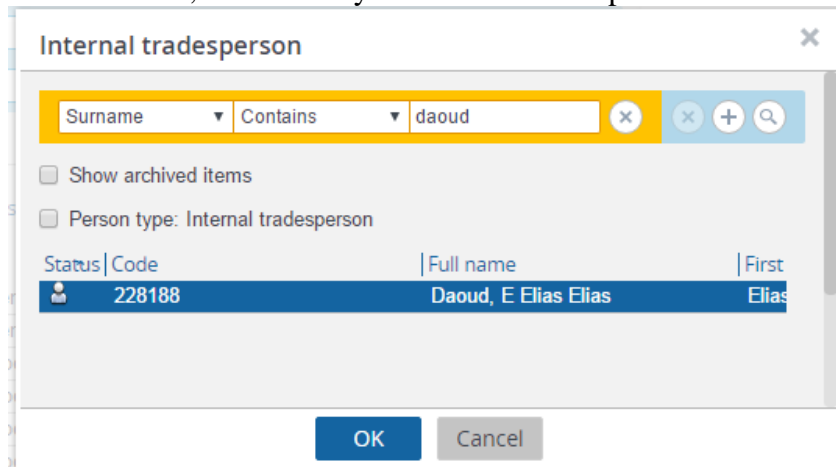
The list now only shows jobs for this tradesperson:
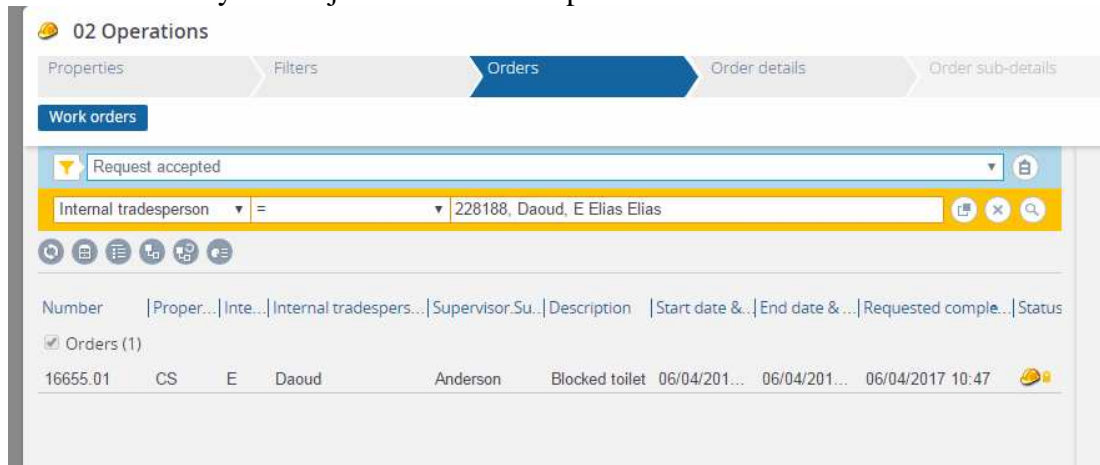
Click to clear the search and show the full list again.

Order Status

Statuses

These are all the possible statuses of a request 📬 and job ⛑ .

HELPDESK REQUEST Status	Colour	Approx. Symbol	REACTIVE WORK ORDER Status	Colour	Approx. Symbol
Reported	Red	*	Order reported	Red	*
Follow-Up	Red	➡			
Accepted	Yellow	✓	To be assigned	Yellow	1
			Unplanned	Yellow	2
			Emergency	Yellow	!
			Planned	Yellow	3
On Hold	Yellow	Padlock🗑	On Hold	Yellow	Padlock🗑
			Assigned	Blue	➡
In Progress	Blue	▶	In Progress	Blue	▶

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Work Completed	Green	↑⫪	Work Completed	Green	✓
Feedback Completed	Green	✓			
Cancelled	Grey	X	Cancelled	Grey	X
Completed	Grey	☑	Administratively completed	Grey	☑

Red or yellow = the job is with the helpdesk or supervisor. It has not been assigned to in-house staff or external contractor or it needs to be re-assigned.

Blue = the job has been passed to in-house staff or a contractor and they have not started or have started but not yet finished.

Green = the work has been completed. The requestor might still raise an issue that requires it to be revisited.

Grey = the request is closed and cannot be changed. If any issue arises a brand new request is required.

PMFS Sent

If a work order has been assigned to one of the maintenance teams then it is on their device. This is indicated by the PMFS status Sent. Scroll down to the PMFS section to see this:
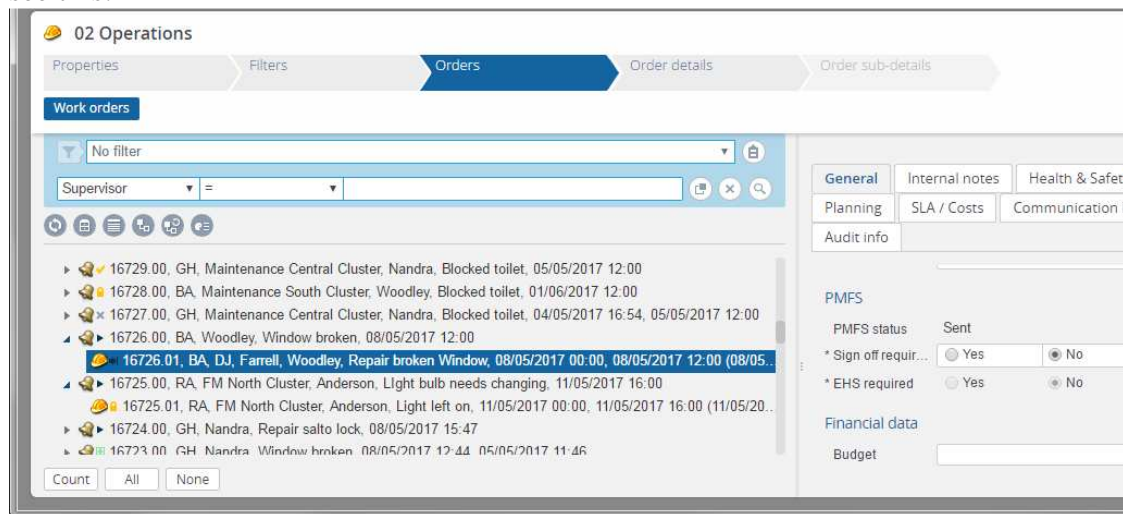
Any job for the in-house maintenance teams that is in a blue status – Job assigned or In progress – should show as Sent.

Once the technician completes or discontinues the job the status will change to On hold or Work completed and the PMFS status will change to Received.

PMFS Received

Jobs that have come back from a technician's device show as PMFS status Received:
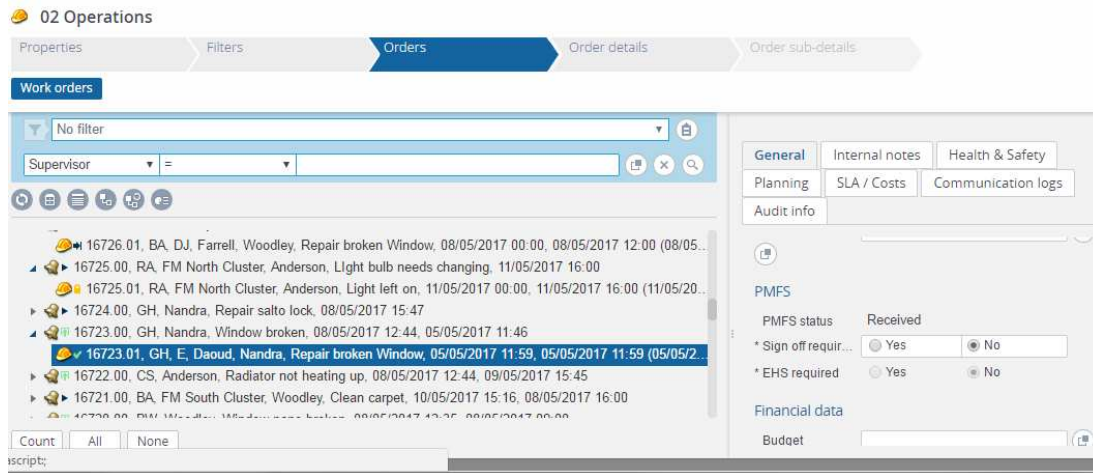
These jobs have either been put on hold or have been completed by the technician

PMFS Blank

Jobs in other statuses show as PMFS status blank.

Jobs assigned to a contractor or to an internal tradesperson who is not set up with a PMFS device always show as PMFS status blank.

View and Amend Job Information

A lot of the information is inherited from the request that job belongs to. If it needs changing you normally change the request and then confirm that you want to apply the changes to the sub-orders in the pop-up screen:
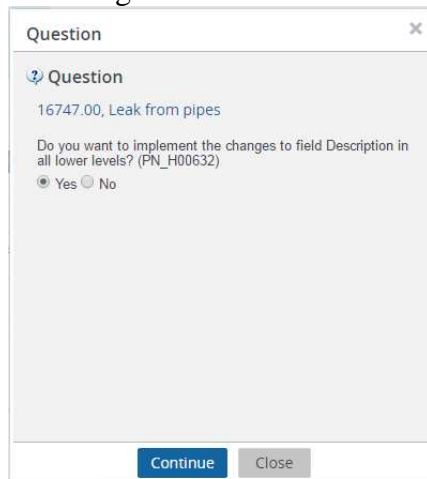
Other fields are not available on the request and so you change them on the job itself.

Any changes you make after a job has gone to status Job Assigned will not be seen by them unless you first put the job On Hold, make the change and then set it back to Job Assigned.

Supervisor

The supervisor defaults to the facilities manager for the relevant cluster. This is set up in *Default supervisors.*

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You can change the supervisor for the job to yourself someone else. Start typing in the name and select from the drop-down list or use the selector button and search in the pop-up.

Standard order

This is the default type of job for the type of request. Or it may have been manually selected if the job was added separately. See *Create a New Job.*

You can change the standard order, which may then affect parts of the job definition e.g. Order group, Priority and Internal tradesperson. If so you get a pop-up asking you to confirm the changes.

Order group

01.15 = Residential maintenance. Any job with this order group will be assigned by default to the maintenance team for the relevant cluster.

02.15 = Residential FM. Any job with this order group will be assigned by default to the FM team for the relevant cluster.

Any other code represents specialist work that does not get assigned to an in-house team by default because it requires a contractor.

Changing the order group may also change the Internal tradesperson to a different team or to blank. If so you get a pop-up asking you to confirm or decline this change:
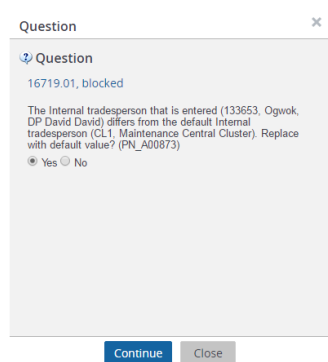
Priority

This is based on the standard order selected and is used to determine the Requested completion date.

Property

As on the request.

Space

As on the request.

Planned Start Date and Time

This is on the Planning tab. It is the date and time that will appear on the technician's device enabling them to see the relative priority of the work and do jobs in the right order.

If it is blank and the order group is 01.15 you the option to assign the job to a Maintenance team by clicking Job Assigned will not be available. You must input a date and time, or copy it from the Requested completion date and time above.

Requested Completion Date and Time

This is the expected completion date and time inherited from the Request. It is initially calculated by adding the Priority time to the date and time the request was initially raised, based on normal 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.

If this is blank or it needs to be changed you normally change it on the request and confirm you want to apply the change to the lower levels i.e. the job. If the request was already in progress then the request receives an email that the target completion date and time has changed.

Internal tradesperson

If the work order group is 01.15 Residential maintenance then the default internal tradesperson is the relevant maintenance team for the cluster. The members of these teams are issued with i-pads running PMFS (Planon mobile field services). When you set a job to Job assigned and the internal tradesperson is one of the Maintenance teams it gets sent to the devices of the members of that team.

If the work order group is 02.15 Residential FM then the default internal tradesperson is the relevant FM team for the cluster. These team members do not have i-pads issued so they need to be informed in some other way that the work has been assigned to them.

You can change the tradesperson to an individual or a different team e.g. start typing in "South" and select the relevant South cluster team from the drop-down list.

Service provider /supplier

Every job should either have an Internal tradesperson or a Supplier service/provider. If it has both then the tradesperson takes priority i.e. it goes to their device.

If the work order group is anything other than 01.15 or 02.15 then by default the internal tradesperson is blank. The supervisor selects a Service provider and arranges the work with this contractor. See Supervisor Notifications

There are two events that trigger an automatic email to the supervisor of a job and also the asset manager of the cluster as a back-up.

These emails are: Job requires contractor and Job discontinued by technician. See the relevant sections *Error! Not a valid bookmark self-reference.* and *Error! Not a valid bookmark self-reference.*.
Assign Job to a Contractor.

Details

This information initially comes from the request. To change the details that the requestor sees on emails about the request you must update the Request. You will then be prompted to update the details on the job as well.

If you just update the Details on the job then you will just change what the technician sees on their device.

Internal Notes

Click the Internal Notes tab and view or update the comment. This is specifically for internal communication between the supervisor, helpdesk and technician. The technician will see this in the comments on their device when they start work, and if they add any comments you will see them here when they finish or discontinue the job.

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. It also sends a message back to Planon.

3. Planon receives the message within 20 minutes and updates the Internal tradesperson to the individual person. The status remains Job assigned.

4. 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.

5. Planon receives the message within 20 minutes and updates the status to In Progress

6. When the technician has finished the job they click End Work and it disappears from their list of Jobs in Progress

7. Planon receives a message within 20 minutes and updates the status to Work Completed.

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

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:
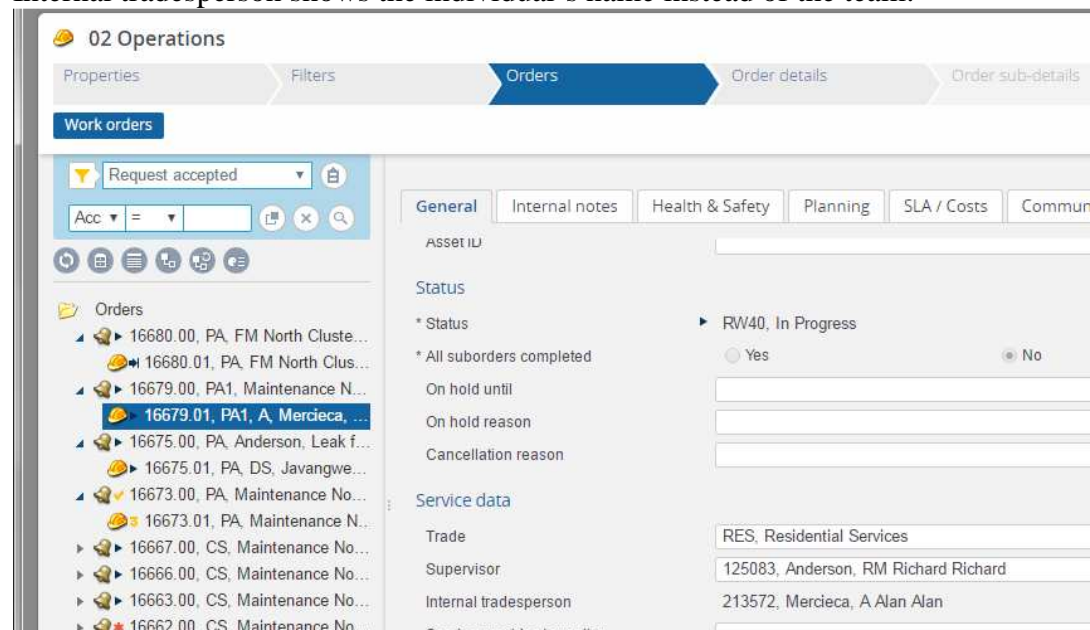
FM Job

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 supervisor 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 supervisor inputs 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.

Jobs on Hold

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 a Job discontinued email to the supervisor so they can re-assign the job to a contractor or take whatever other action is required.

Status transitions for a held job

When a held job is ready to go back to a technician or to a contractor there is not a direct transition back to Job assigned. Instead you click each of these in order:
- To be assigned
- Unplanned
- Planned
- Job assigned

Put job on hold

The supervisor can also put a current job on hold. Just click the On hold Status transition on the right-hand menu.

If the job was with a technician it removes it from their device. You can now take some other action such as:

- Change some of the job details and then send it back. While the job is with the technician any information you change will not get updated on their device. If there are important changes to make then put it On hold, make the changes and then set back to Job assigned as above.

- Re-assign to another technician or maintenance team. Change the Internal tradesperson and then set back to Job assigned.

- Re-assign to a contractor. See the section *Re-assign to contractor*.

- Cancel the job. In the General tab select a Cancellation reason and click Save. Now you can set the job to Cancelled.

- To complete a job that didn't get set to completed. See the section *Set an Old Job to Completed.*

Supervisor Notifications

There are two events that trigger an automatic email to the supervisor of a job and also the asset manager of the cluster as a back-up.

These emails are: Job requires contractor and Job discontinued by technician. See the relevant sections ***Error! Not a valid bookmark self-reference.*** and ***Error! Not a valid bookmark self-reference.***.

Assign Job to a Contractor

If a request is raised by the Helpdesk and the Internal tradesperson is not automatically set to a cluster Maintenance team or FM team then the cluster supervisor receives an email that a Job requires a contractor.

To deal with this email:
1. Search for the job in Planon and select it.
2. Select the contractor company in the Service provider / supplier field.
3. Change the Description and Details as required.
4. If applicable, select the Planning tab and input a Start date and time for the contactor work.
5. Select the Status transition To be assigned, then Unplanned, then Planned. Once you have arranged the work with the contractor select the transition Job assigned.

When the contractor starts the work and finishes the job change the status to In progress and Work completed. When it goes to Work completed the requestor will get the notification as normal if there are no other jobs on the request that have not been completed.

These steps are all the same as when re-assigning a job from an internal tradesperson to a contractor.

If the notification was incorrect and the job can in fact be done internally then instead of entering the Service provider insert the relevant maintenance team into Internal tradesperson in step 2. above. The other steps 1. to 5. are the same.

Deal with a job on hold

A supervisor may have set the job to On hold in planon, which also removes it from the technician's device, or the technician may have discontinued the job on the device, which sends a message to the supervisor and sets it to On hold in planon.

Search for a particular job with Ctrl-Space or select the filter Jobs on hold:
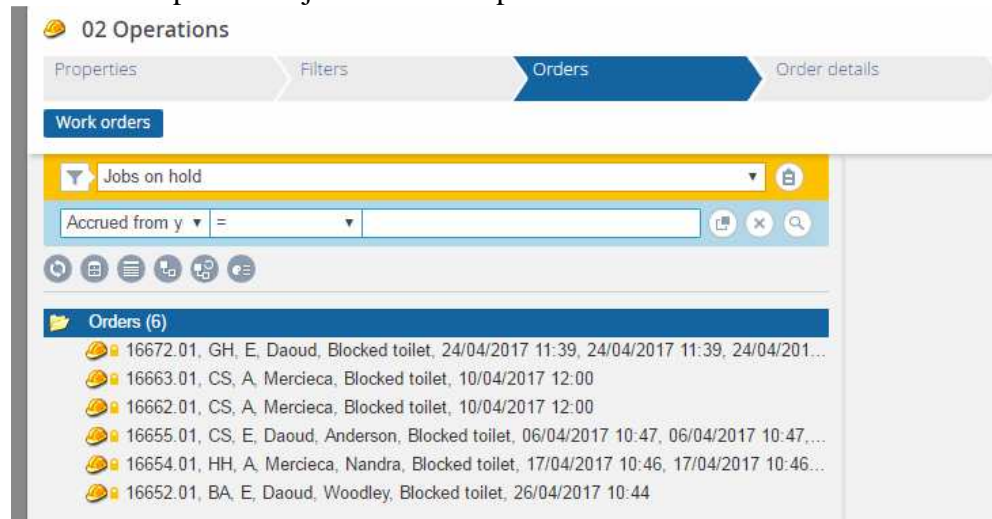
If you want to see the related requests as well click the Related orders icon :

Re-assign to contractor

1. Select the work order that is on hold.
2. Copy the work order using the Copy button on the right
3. Select the new one, which is in Order reported status:
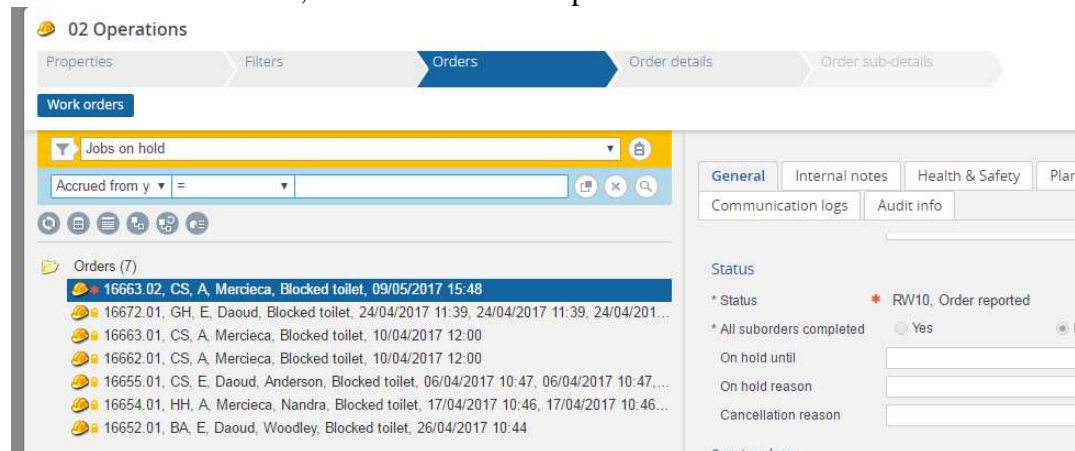
4. Remove the Internal tradesperson and pick a Service provider / supplier
5. Change the Description and Details as required.

6. If applicable, select the Planning tab and input a Start date and time for the contactor work:
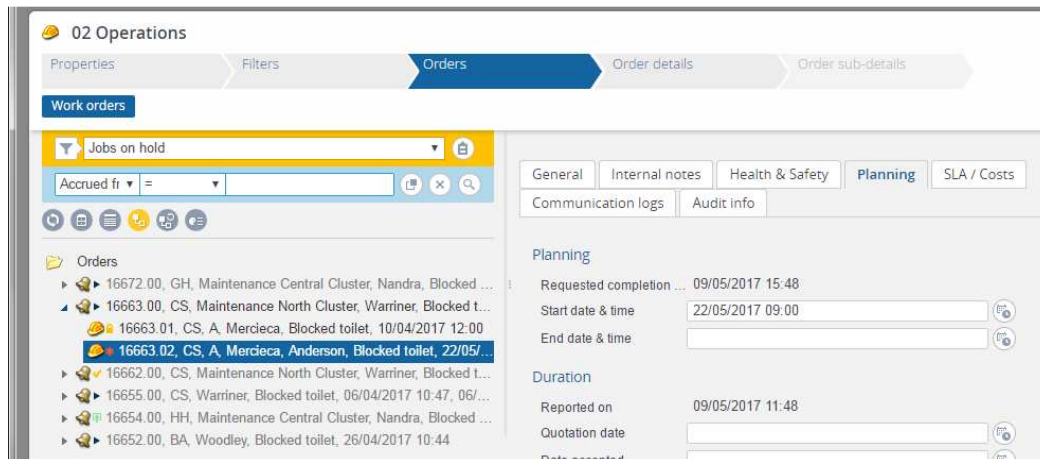
7. Select the Status transition To be assigned, then Unplanned, then Planned. Once you have arranged the work with the contractor select the transition Job assigned.
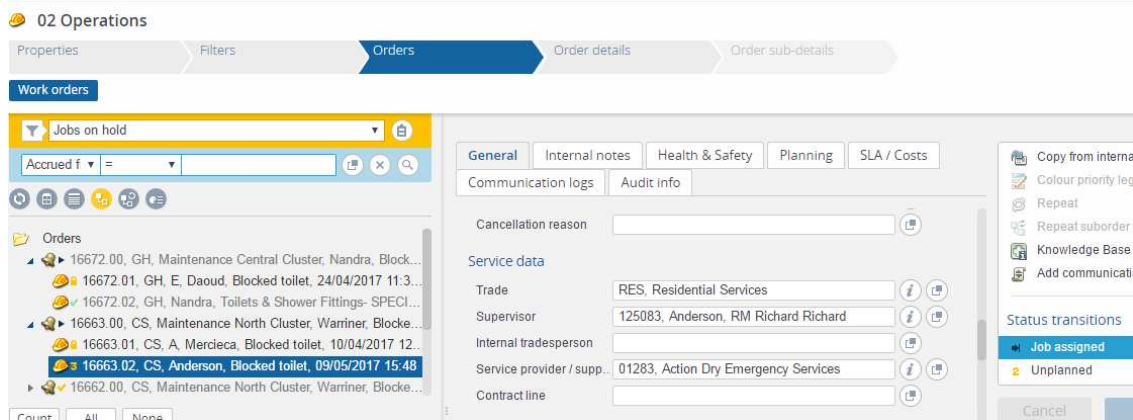
8. Now, as the work has been transferred to a new job, finish the one that was on hold. Select it, pick an 'On hold reason' and Save.
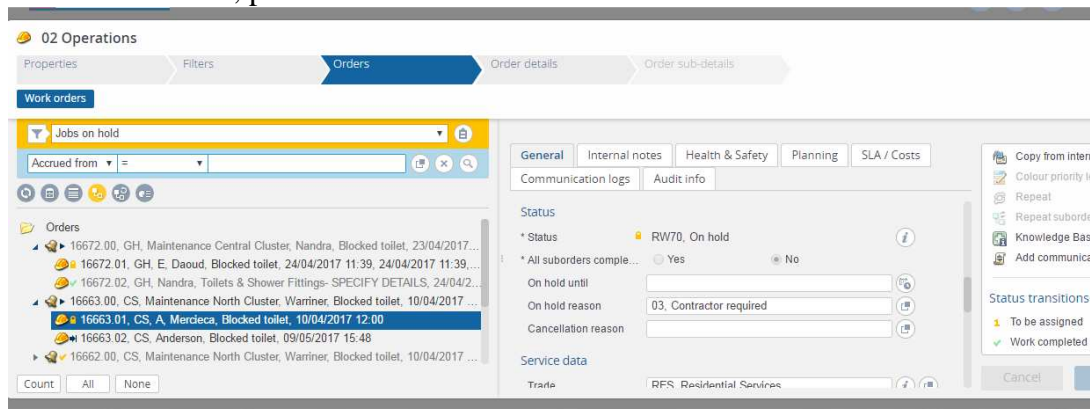
9. Then set it to Work completed
10. For the customer to be notified of the delay select the Request that the job belongs to and change the Requested completion date to the new expected completion date/time. See the section *Requested Completion Date and Time*.
11. When the contractor starts the work and finishes the job change the status to In progress and Work completed. When it goes to Work completed the requestor will

get the notification as normal if there are no further outstanding jobs on the request.

Parts required

If parts are required or some other reason prevents the work being continued then once the parts are received or the problem is resolved update the Internal notes to indicate that the job can now proceed and set it back to Job assigned.

Create a New Job

There are four different ways of creating a new job:

1. Raise a request in the normal way as described in the Helpdesk manual. Based on the standard order you pick a job is automatically created to deal with the request.

2. Copy an existing job to a new one. This is what you normally do when the in-house technician cannot complete the work. See the section *Re-assign to contractor*.

3. Add a new job under a request. This is the same as copying an existing job except you start with a blank form. This is when an additional piece of work is required in order to deal with the problem.

   Select the relevant request. Click Add Sub on the right hand menu and select Reactive work order:
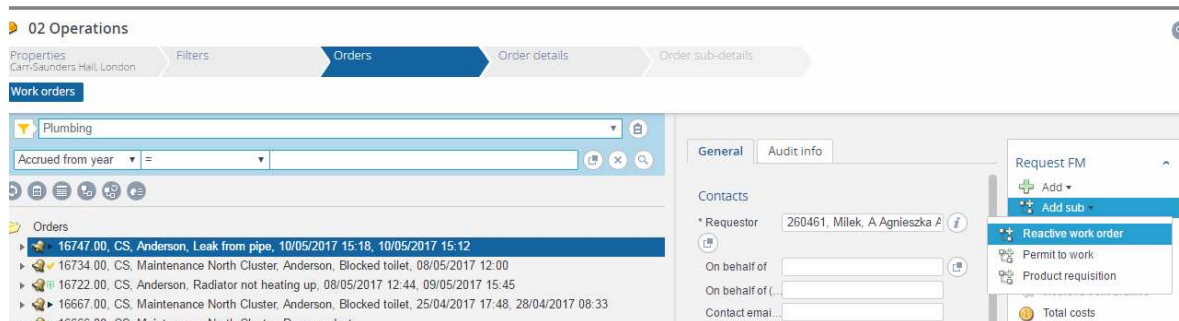
   This gives you a new empty form to fill in. As with raising a request, once you select the standard order some of the other fields are automatically completed.

4. Add a standalone job. The job will not belong to a request. It is just something the supervisor knows needs to be done. Click Add on the right hand menu and select Reactive work order:
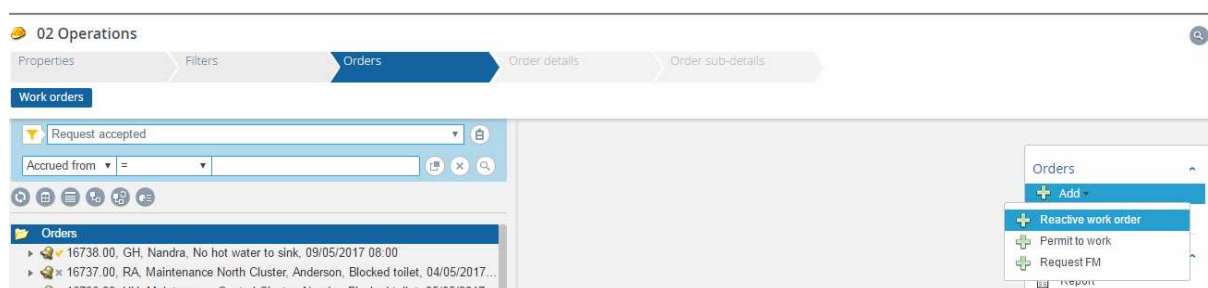
In this case, when you search for a standard order it only shows those types of job that can be created without a request. If this list is insufficient then an operational administrator must add more. See Operational administrator – Standard orders - *Add a standard order.*

Set an Old Job to Completed

In case a technician's job was completed but not updated to this status, you can update it as follows:

1. Set the job to On Hold
2. Select 'On hold reason' = Need to reschedule
3. Save
4. Now you can set the job to Work completed
5. If desired, on the Planning tab, change 'Technically completed on' to the date and time when it was completed, and Save

View Comments and Actions

Select a job. To see any comments added by the technician click the Internal notes tab:
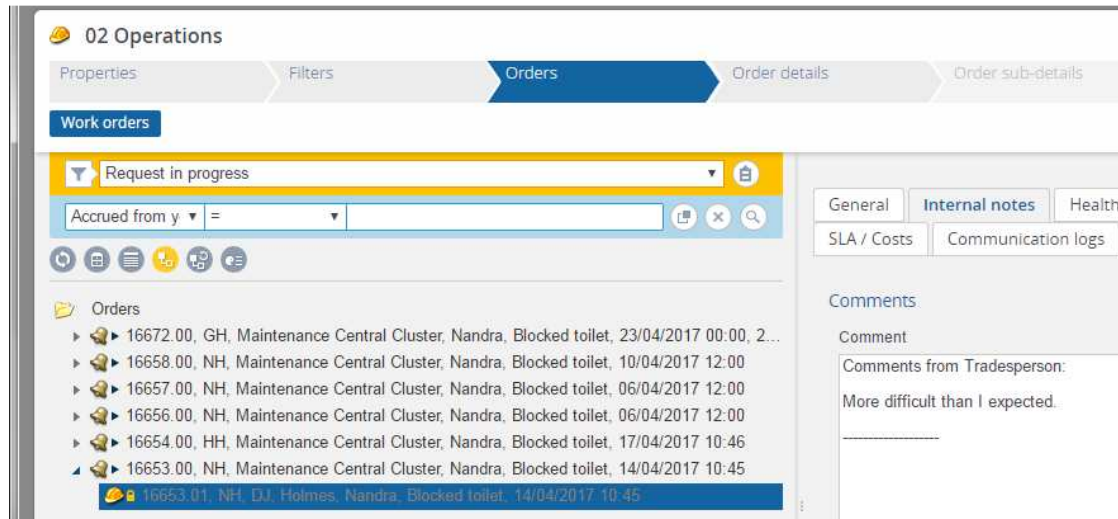
Click the Communication logs tab to see any further comments:
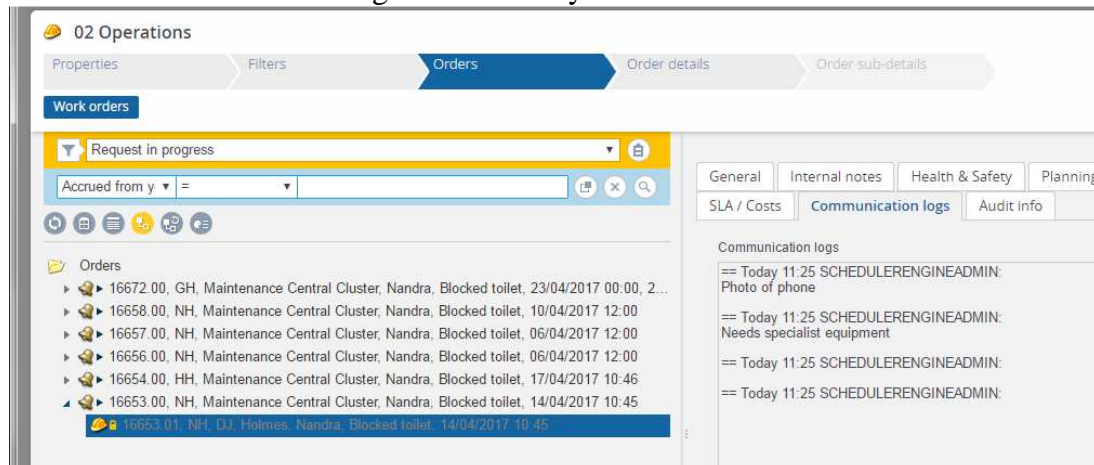
Click the next level down – Order details and then select Communication logs – orders. This shows a list of the actions taken by the technician on the device:
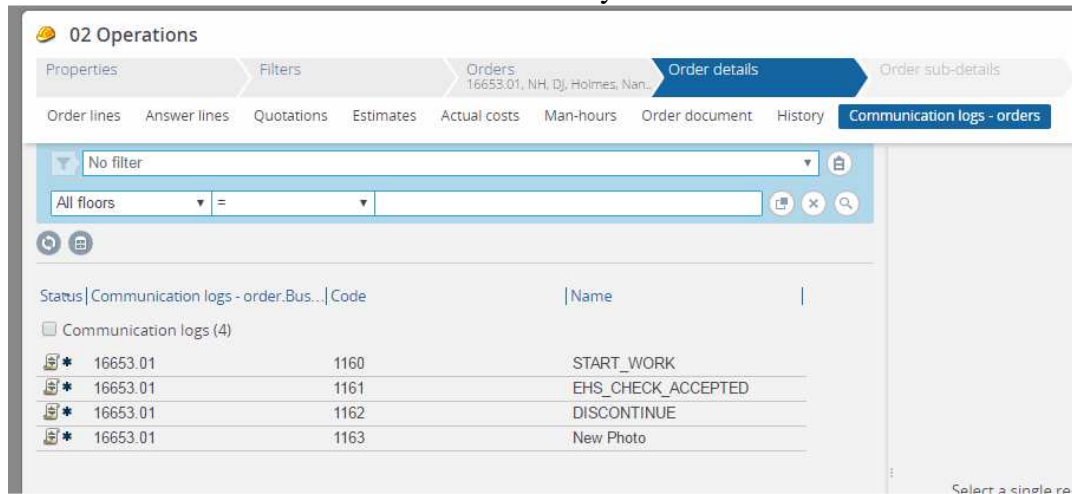
Click the Discontinue action to see the reason selected:
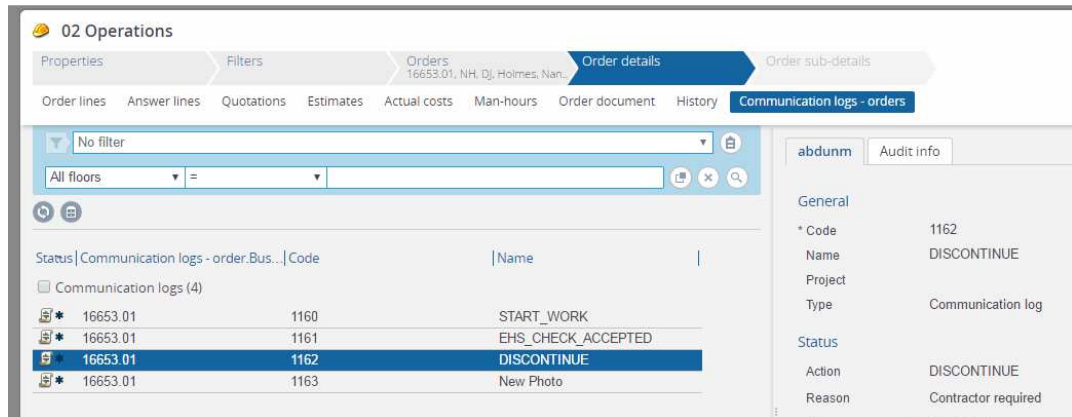
If the technician took a photo this can be viewed on the New Photo line. Select it and then click the View icon:

Reports

There are some specific maintenance reports for which guides are available in the Document library. See the section below.

Whatever you screen you are in, if there is a list of items then you can print or export relevant information from those items in a report.

First go to the appropriate screen, and if applicable, set a filter or search condition to list just the relevant items for the report.

Click the report button in the right-hand menu.

Find the relevant report in the list. Select Preview to see it on the screen or Save As to and then choose the export type e.g. Pdf, Xlsx. Make sure that Include header is set to Yes.

If you do not know which report to use or you need one changed or created contact your System administrator.

Document Library

In the live system all user guides are stored in the Document library. From the main drop-down menu select 03 Document Library – 01 Document library. Then under Dossiers open up 22 Systems Management, 22.01 LSE User Guides and then select the appropriate folder:
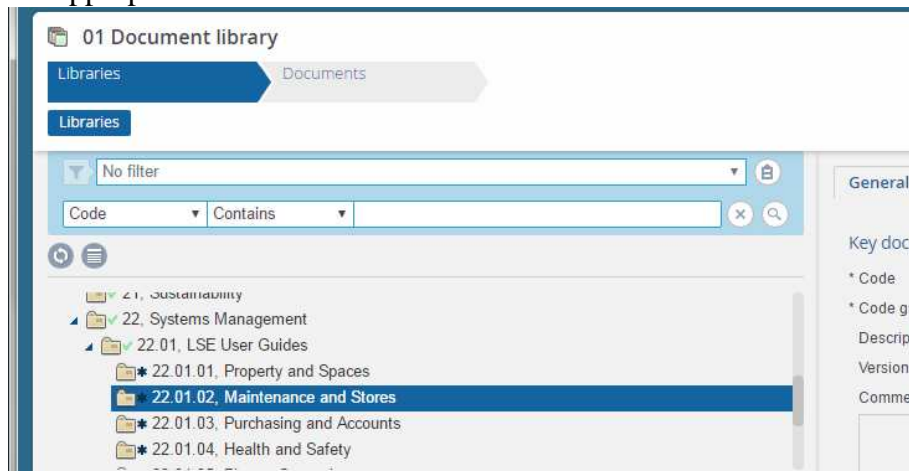
Now click the Documents heading at the top to see the documents in this folder:

Select one and then click the View icon in the Document (secure) field:
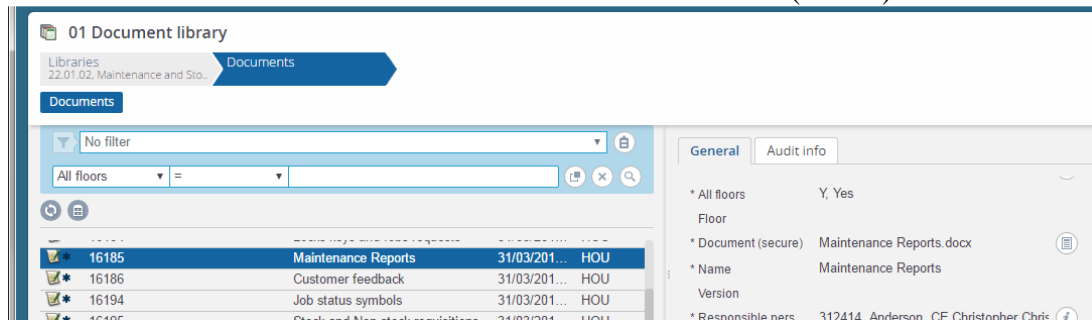
If nothing happens or you get an error it is because your browser is blocking pop-ups. Change the settings to enable pop-ups. Contact the IT service desk if you need assistance with this.

Operational administrator

Systems administrators and some supervisors have access to the Operational Administrator functions to set some of the background system data.

Asset manager

In the main drop-down menu select 01 Spaces – 01 Spaces and floor plans.

Select a cluster and click the Characteristics tab:
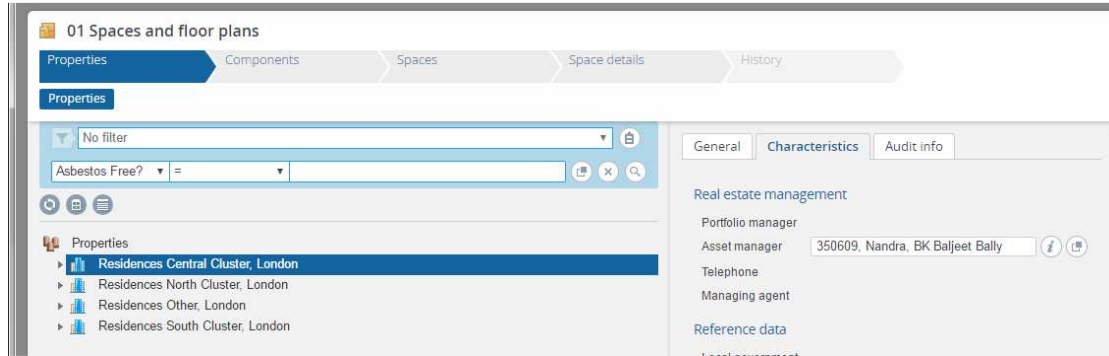
The asset manager will receive supervisor notifications for jobs in this cluster in addition to the default supervisor for the cluster. You can remove or change this person. Answer Yes to the pop-up question and Continue:
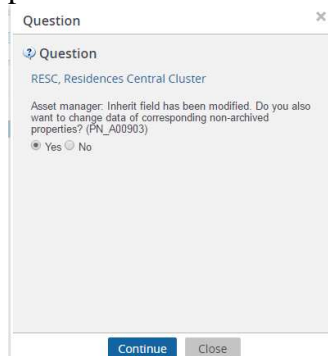
Reception email and telephone

Each building should have the reception email and telephone number entered, so that these appear on emails to the requestor.

Select each building within each cluster and verify or change the email and telephone number on the General tab:
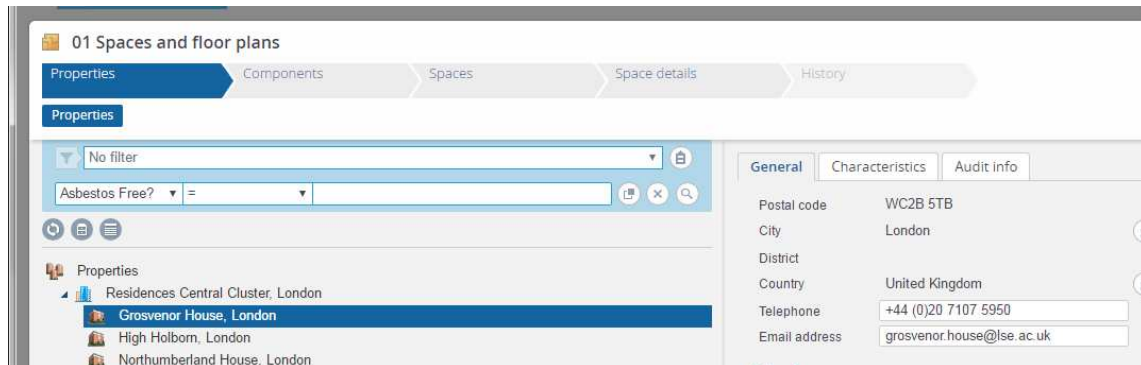
Standard Orders

Select MM17 Operational Administrator in the main drop-down menu. Then select 02 Standard orders:
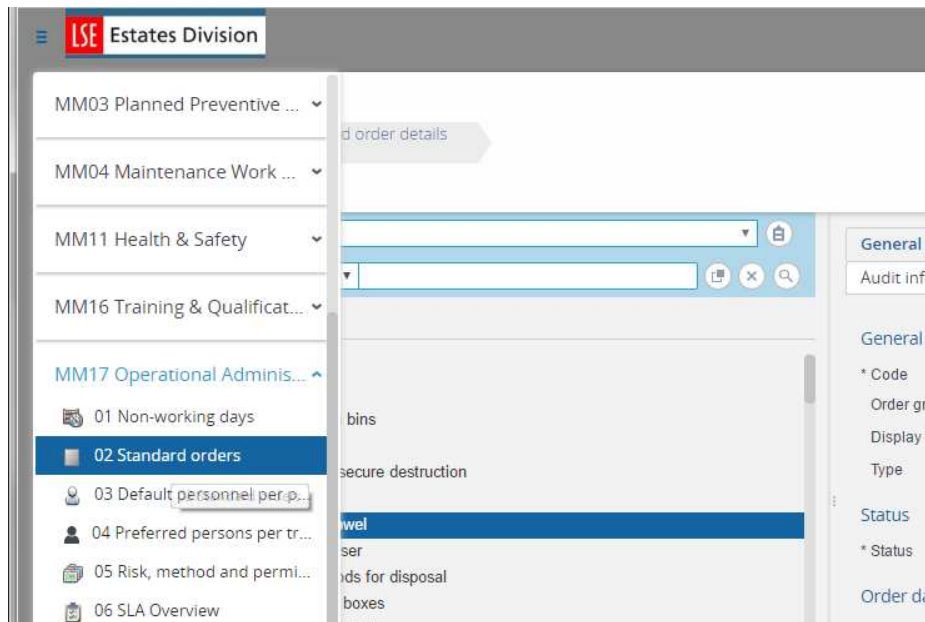
Select a standard order. The key information is as follows:

Code
Unique. It must begin with "RES". This restricts it to use by Residences.

Order group
01.15 = Residential maintenance. Any job with this order group will be assigned by default to the maintenance team for the relevant cluster.

02.15 = Residential FM. Any job with this order group will be assigned by default to the FM team for the relevant cluster.

Any other code represents specialist work that does not get assigned to an in-house team by default because it requires a contractor.

Type
Request FM = a request. This is also indicated by the bell icon.
Reactive work order = a job. This is also indicated by the hard hat icon.
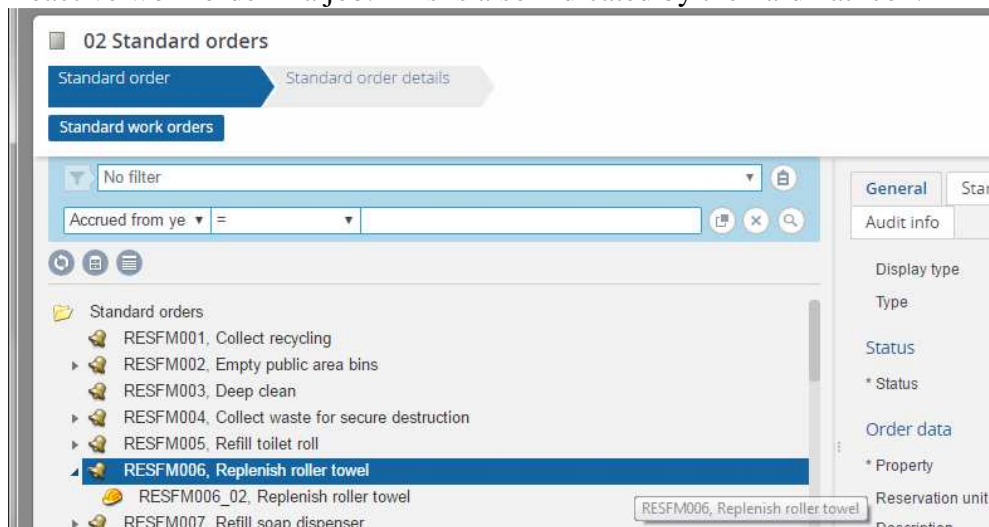
Normally for each standard request there is a standard reactive order underneath it to do the necessary work.

Status
This is the default status for a new request or job that uses the standard order. It is always R15, Accepted for a request and RW25, Planned for a job.

Property
This must have a value but it does not affect anything so just use RESC. The requests and jobs themselves must specify the relevant building.

Description
The default description for this type of request or job.

Priority
The SLA for this type of request i.e. the target period within which it should be completed once it has been reported.

Trade
This must be RES for all Residences requests and jobs.

Supervisor
This is blank, because Planon will put in the default supervisor based on the location of the work.

Internal tradesperson
This is blank because Planon will put in the Maintenance or FM team based on the order group (01.15 or 02.15) and the location of the work.

Remove a standard order
If a standard order is not required you can select it and click Delete. If you get an error message then you cannot delete it because it has already been used. Instead you can archive it, which has the same effect. To do this click Transfer to archive.
It is now hidden from screens and nobody will be able to use it again, unless it is retrieved from the archive.

Click the refresh button so that deleted or archived standard orders no longer appear.

Remove multiple standard orders
To delete or archive more than one standard order at the same time select all the items to be removed and then click Action on selection. Take the option Delete or Transfer to archive.
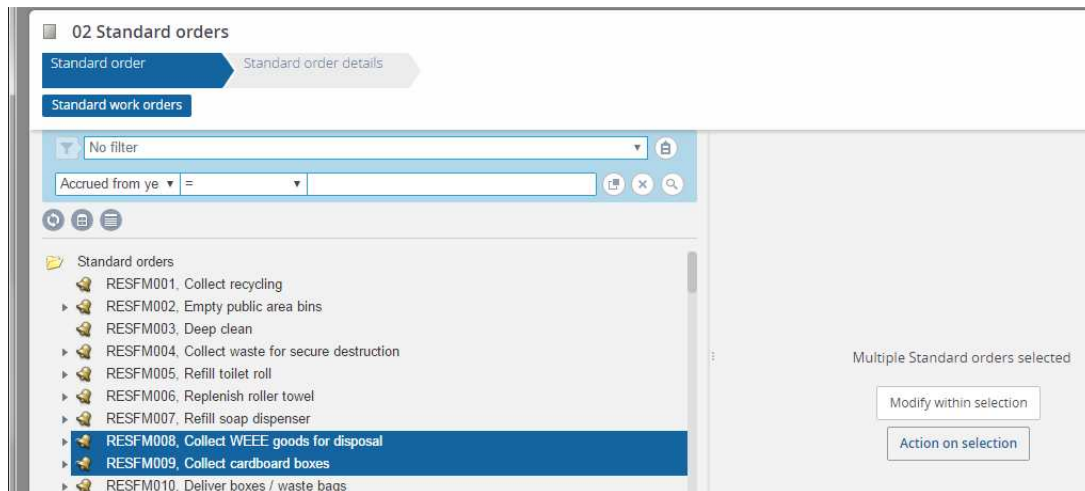
If there are any that cannot be removed with this action you get the option to skip those items.

Change a standard order

Instead of removing a standard order you can change it to represent some other type of request or job. Change any of the fields and click Save.

Change multiple standard orders

If you want to change a number of standard orders to the same value for a particular field e.g. change the order group to 02.15 then select the relevant items and click Modify within selection:
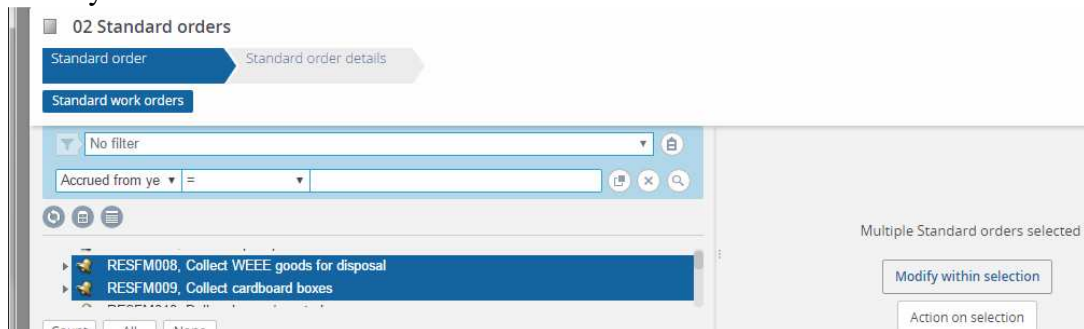
Then input the new value(s) into the relevant field(s):
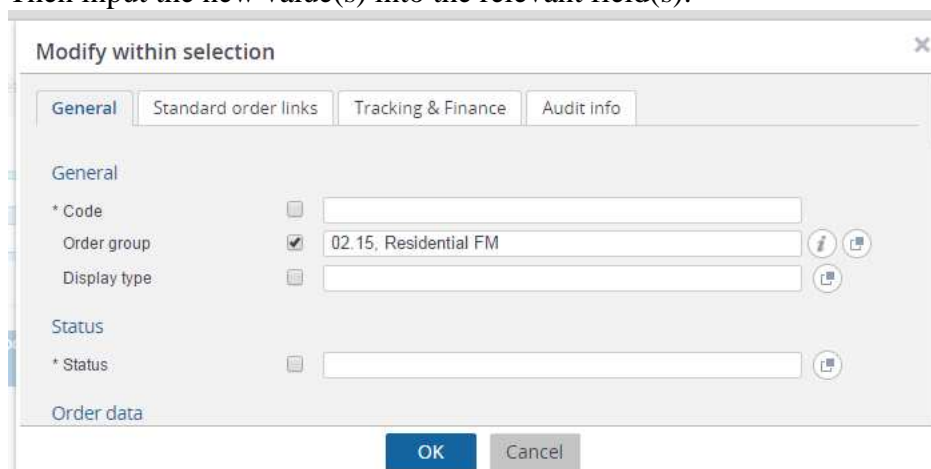
Add a standard order

The easiest way to do this is to select an existing standard order and click Copy. If you select a Request FM that has a sub-order defined underneath it then it will create a copy of both, adding " (2," or "(," to the code:
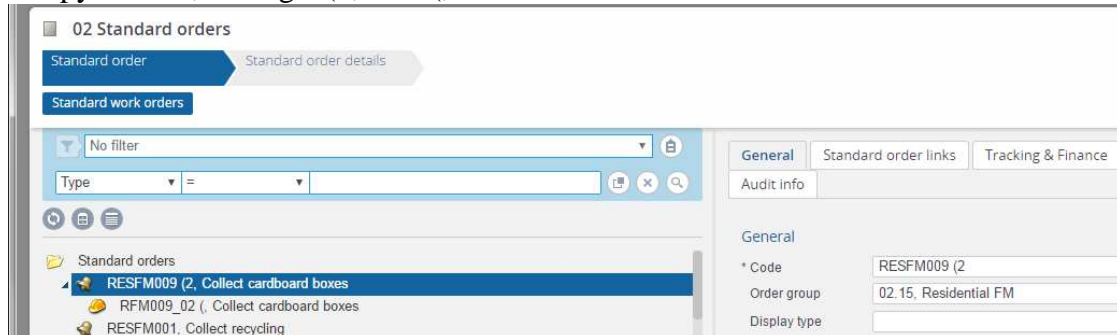
Change the code and potentially the order group, description and priority of the newly created standard request and its sub-order.

Default supervisors

Select MM17 Operational Administrator - 03 Default personnel per property & order group. Select a cluster and click the Default internal coordinators per property & group tab. For all buildings in this cluster and all possible order groups the default supervisor is set:
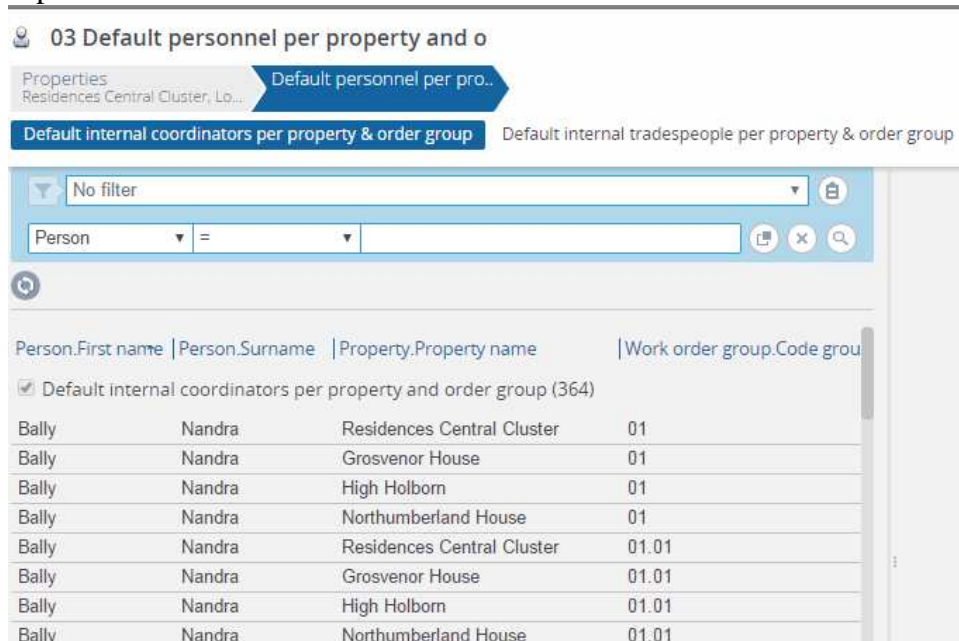
If required all records could be selected and changed to a different supervisor. Click All at the bottom of the screen and then Modify within selection:

03 Default personnel per property and o

Properties
Residences Central Cluster, Lo...

Default personnel per pro..

Default internal coordinators per property & order group | Default internal tradespeople per property & order group

No filter

Person | = |

Person.First name | Person.Surname | Property.Property name | Work order group.Code grou

☑ Default internal coordinators per property and order group (364)

Bally	Nandra	Residences Central Cluster	01
Bally	Nandra	Grosvenor House	01
Bally	Nandra	High Holborn	01
Bally	Nandra	Northumberland House	01
Bally	Nandra	Residences Central Cluster	01.01
Bally	Nandra	Grosvenor House	01.01
Bally	Nandra	High Holborn	01.01
Bally	Nandra	Northumberland House	01.01
Bally	Nandra	Residences Central Cluster	01.01.01
Bally	Nandra	Grosvenor House	01.01.01
Bally	Nandra	High Holborn	01.01.01
Bally	Nandra	Northumberland House	01.01.01
Bally	Nandra	Residences Central Cluster	01.01.02
Bally	Nandra	Grosvenor House	01.01.02
Bally	Nandra	High Holborn	01.01.02

Multiple Default internal coordinators per property and order group selected

Modify within selection

Action on selection

Count | All | None

For a new building or order group it is best for the System administrator to use the Enterprise Talk Import function to upload a whole set of new records.

Default maintenance teams

Select MM17 Operational Administrator - 03 Default personnel per property & order group. Select a cluster and click the Default internal tradespeople per property & group tab:

03 Default personnel per property and o

Properties
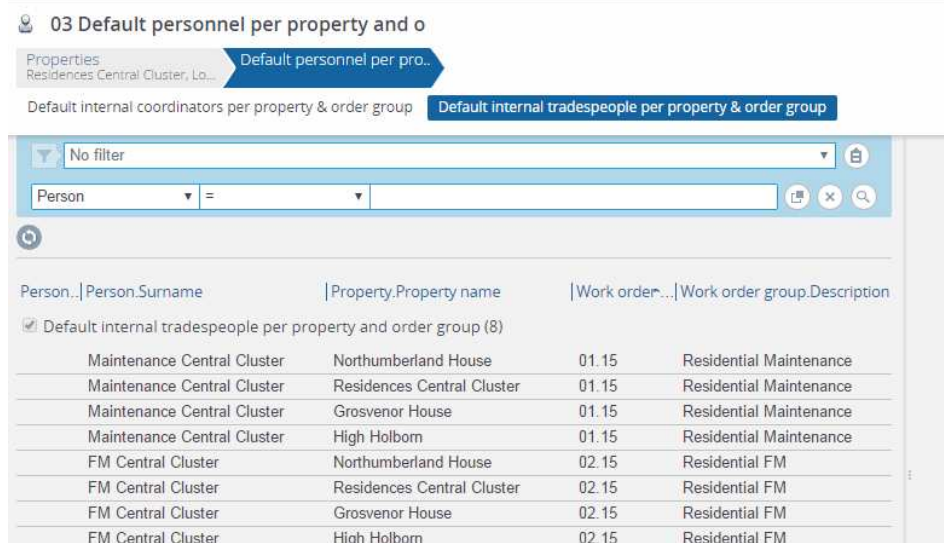Residences Central Cluster, Lo...

Default personnel per pro..

Default internal coordinators per property & order group | Default internal tradespeople per property & order group

No filter

Person | = |

Person.. | Person.Surname | Property.Property name | Work order.. | Work order group.Description

☑ Default internal tradespeople per property and order group (8)

| | Maintenance Central Cluster | Northumberland House | 01.15 | Residential Maintenance |
	Maintenance Central Cluster	Residences Central Cluster	01.15	Residential Maintenance
	Maintenance Central Cluster	Grosvenor House	01.15	Residential Maintenance
	Maintenance Central Cluster	High Holborn	01.15	Residential Maintenance
	FM Central Cluster	Northumberland House	02.15	Residential FM
	FM Central Cluster	Residences Central Cluster	02.15	Residential FM
	FM Central Cluster	Grosvenor House	02.15	Residential FM
	FM Central Cluster	High Holborn	02.15	Residential FM

This shows that jobs in these specific order groups get automatically assigned to the relevant team for the cluster. The Person.Surname field contains the team name instead.

The Maintenance teams are defined in the section below to contain the tradespeople who do the maintenance for that cluster and have been issued with i-pads running PMFS. See Completing a Job - *Maintenance team* for how these jobs are progressed.

The FM teams are not associated with any specific individuals. See Completing a Job - *FM Job* for how these jobs are progressed.
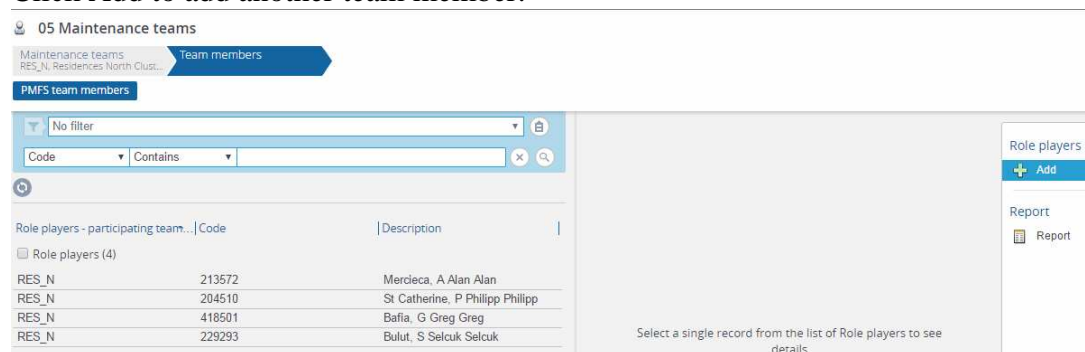
Maintenance teams

Select MM17 Operational Administrator - 05 Maintenance teams. Then select the team you want to change the members of:
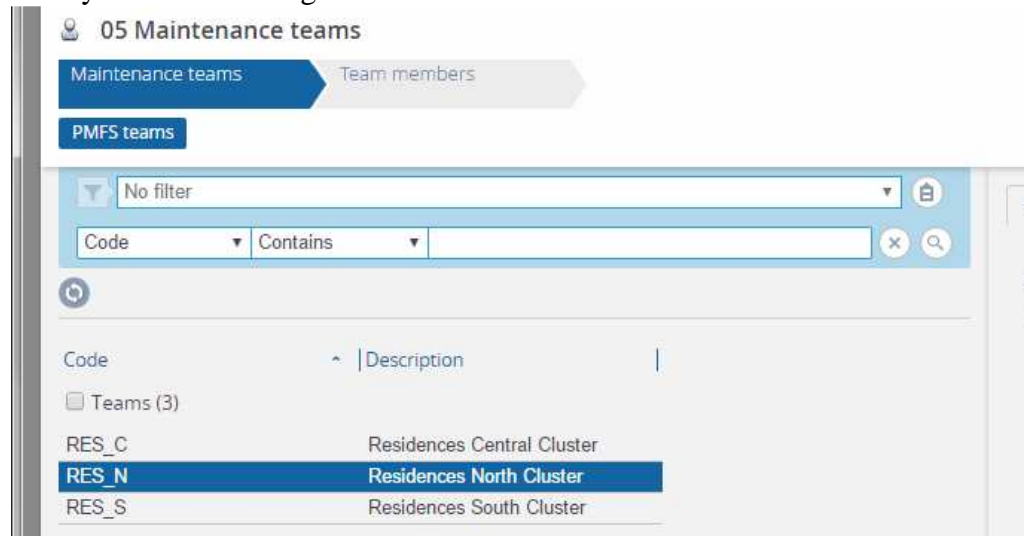
Click the next level – Team members
Click Add to add another team member:

A code is automatically generated. Pick Tradesperson as the role. Type in the person's name and pick them form the drop-down list, or use the selector.

Pick today as the start date (or use Ctrl-D).

Note, they must also be added to the PMFS user group and be given a PMFS Id in the Personnel screen. Only a System administrator can do this.

To remove a member from the team select them in the list and click Delete.