

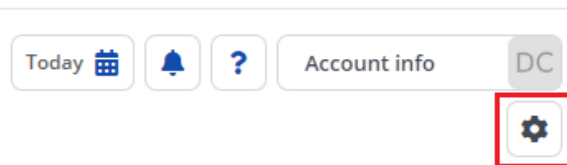


Planon Internal Communications Job Aid for Requestors

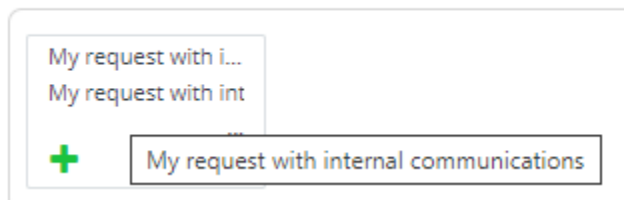
This document illustrates how service requestors can add the new “My requests and suborders” gadget to their Planon homepage, and view internal communications associated with each service request.

Adding the New Gadget

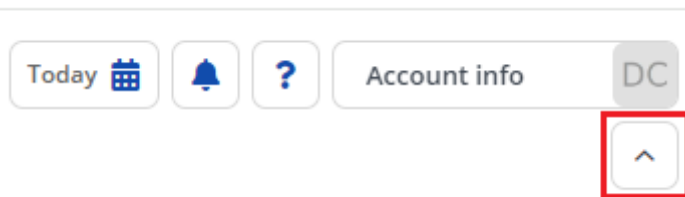
In the top right corner on your Planon homepage, click the gear icon.



Click on the green + sign in the gadget “My requests with internal communications”



Click on the arrow in the top right corner on your Planon homepage to return to your Planon homepage





Scroll down to “My requests and work orders” gadget and click into each service request to view its internal communications. Alternately, you can type in a specific service request number and click search.

My requests and work orders

i On this page you can view your service requests and their associated suborders, as well as any notes by technicians. Click on a request to see details.

Number

Search

[Show more search options](#)

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Number	Description	Status	Reported on
292147.00	LSC 1003 - Adjust spotlight angle and intensity	In progress	04/06/2024 12:30
291899.00	LSC 4534 - Leak from ceiling - URGENT	In progress	03/06/2024 12:24
287112.00	LSC 5357 - Wall repair	In progress	15/05/2024 13:00
287110.00	LSC 5357 - Remove damaged metal shelves	In progress	15/05/2024 12:55
287025.00	LSC 2438 - Water leak - URGENT	In progress	15/05/2024 09:35
286849.00	LSC1512 - Vacuum clean office	In progress	14/05/2024 12:54
286545.00	LSC 5433 too hot causing freezers to go into alarm	In progress	13/05/2024 11:16
286232.00	LSC: Lock-out elevators 1-4 for installing wraps - May 14th starting 9:30am	In progress	10/05/2024 09:19



The text within the red boxes explains the different elements of the widget.

Orders and communication logs

Number
244766.00

Description
Bollard damaged Main Mall at Agronomy

This section lists the work orders associated with the service request

The Status field indicates the status of each individual work order. See legend at the end of this work order for more information on each status type

Orders 1 - 2 of 2

Number	Internal coordinator	Description	Status	Reported on
244766.01	B42OH Operations and Maintenance Heads Municipal	Bollard damaged Main Mall at Agronomy	On hold	29/04/2024 10:47
244766.02	B12H Sheetmetal Heads Mechanical Trades	B12 (Core) Bollard Main Mall / Agronomy Other:Sheetmetal	Assigned	29/04/2024 11:22

Communication logs 1 - 4 of 4

① Notes from Facilities team members (if any) are found in the Information column below. If you have any questions about these notes please contact our Facilities Service Centre at 604-822-2173 or servicecentre.buildingops@ubc.ca.

The responsible person field is only populated when a technician leaves a note from the mobile app. All other internal communications have been left by back office users

These are the internal communications associated with the above work orders

Responsible person (Personnel)	Communication date	Information
	29/04/2024 11:17:57	Monday, 29 April 2024 11:17 dcapps - Deb Capps: Please have a look and make secure. Let me know if another crew is needed.
Fotios Alexiou	29/04/2024 11:20:43	Had a look. Need to have the bollard welded.
	29/04/2024 11:24:51	Have a look and make safe.
Mark Anderson	29/04/2024 11:34:07	Welding completed.

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If you have added photos and/or documents to the Service Request, the communication log will reflect this with a blank entry in your name.

Orders and communication logs
✕

Number
288718.00

Description
MOA - Courtyard cleaning

Orders 1 - 1 of 1

Number	Internal coordinator	Description	Status	Reported on
288718.01	B42OH Operations and Maintenance Heads Municipal	B42O (Internal): MOA - Courtyard cleaning	Technically completed	23/05/2024 11:56

Communication logs

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Responsible person	Communication date	Information
Brannen Bell	23/05/2024 11:56:40	
Brannen Bell	23/05/2024 11:56:40	
Brannen Bell	23/05/2024 11:56:40	
Brannen Bell	23/05/2024 11:56:41	

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Work Order Status Legend

Status	Description
Accepted	The work order has not yet been assigned to a technician
Assigned	The work order has been assigned to a technician but has not yet been worked on
In progress	The work order is currently assigned to a technician, work is happening
Oh hold	The work order has been previously worked on by a technician, the technician has placed it on hold for various reasons (i.e., waiting on materials, needs support, needs access, etc.).
Technically complete	The work order is complete; all work for the assigned crew is complete
Administratively complete	The work order for the assigned crew has been fully billed and has been permanently completed

Important Note About Viewing Internal Communications

The new gadget provides additional view access into service requests. Both the service requestor and the person named in the “requested for” on the service request will be able to view internal communications for the associated work orders.

Important Note About Editing Service Requests

If you edit a submitted Service Request, the changes you make override any information that has been since input by Facilities Staff. If you need updates on your Service Request, or want to make any changes, please contact the Facilities Service Centre, who will be happy to do so on your behalf. You can call them or email them with the Service Request number.