



Rev 6.28.19

# Planon Work Request Self Service User's Guide Goes live July 1, 2019



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# **Self-Service – An Introduction**

The Planon Integrated Work Management System allows users to submit and track facilities work request via its self service module.

## Starting Web Client

To log in to Planon Web Client

Procedure:

- 1. Go to <u>http://sso.csulb.edu</u> and select the Beach Building Services chiclet or <u>https://ppfm.csulb.edu</u> and select Request Services and click on Log into Planon
- 2. On the login screen, enter your campus single sign on (SSO) user name and password.
- 3. Click OK.

### To Log out of the Web Client

You can log out of the Planon Web Client in three ways:

- Using the Log out button on your account information.
- Closing the browser the session will expire after a certain time
- If you do not use the application for a certain period of time, you will be logged out automatically.

**Troubleshooting:** if for some reason your screen appears blank when logging on for the first time, you can activate your chicklets by selecting the small gear icon on the right hand side and adding the two chicklets shown below by selecting the + sign.

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Figure 0: Adding chiclets to your Planon workspace

# Navigating the gadgets page

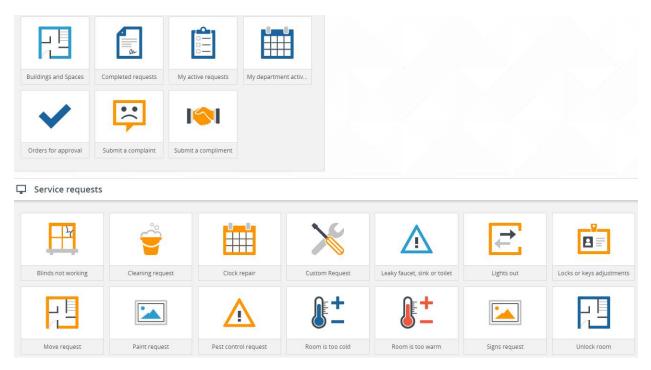


Figure 1: Dashboards with chicklets that you see upon logging into Planon

On your home screen you will see several chicklets pertaining to the Self Service module

### My Planon:

- **Submit a compliment or complaint:** This allows you to submit a complaint. Messages go out to our Customer Response supervisor to review
- Orders for approval: If you are the department ASM or assigned approver, you can view a list of requests waiting for you to approve them.
- My active requests: This will display all active requests you've submitted
- My department active requests: This will display orders from your department
- **Completed requests:** requests that are completed for your department
- Orders for approval : if you are the approver for your department you will see a listing of work orders ready for you to approve
- Building and spaces allows you to view space categories for each building's room

#### **Under Service requests**

- There are several common requests that requestors submit. A Custom request allows you to create your own request for example.

# **Submitting Service Request**

Procedure example

1. Go to the Service requests area and click on the Cleaning request icon.

$\ominus$	Add service request			
	Requestor information			
	Description	Cleaning request		]
	Requestor	000018341 Cynthia Masner		
		Email	Cindy.Masner@csulb.ec	lu
		Department	Department of Athletics,	D3.D3_010.D3_010_010.00179
	Submitted on behalf of	000037620, Williams, Leah		
	Location of work			
	Property *	FM, Facilities Management		
	Space	103 - Conference Room		
	Requested completion by	📇 6/27/2019 04:16 PN 🔞		
	Asset Ex. vehicles, clocks, et			
	Billing information			
	Preferred billing account			]
	Approver (automatic based on department)			
	Department tracking info	LA-1234-HS-32		]
	Work details			
	Details	Please clean the soda spill in the c	onference room	
	Attachments			
	Files			
		Submit	Cancel	

Figure 2: Submitting a Service Request form

2. Upon selecting a request, the Add service request appears. Enter any missing information you need to add.

Note: Fields with an **asterisk** next to the label are required fields.

**Description:** edit the description if you need to.

**Submitted on behalf of:** select the person you are submitting for by typing the start of their last name or first name or staff ID number and select the user. You can also click on the selection box and search by everyone in your department by clicking on the Search button and select a user.

Submitted on behalf of		
<b>G</b> Search by		
Campus ID Last Name First name Department	Department of Athletics	
	Search	

Figure 3: Submitting a Submitted on behalf of field and selecting a user by department

**Property:** start typing the property acronym and select the property from the list or select the selection box and type the property and click Search.

**Space:** type the room or select the selection box and enter the building then click on Search to list all the rooms for the building and double click it.

	Select	a value	matching	vour	property
<u> </u>	JUICEE	a value	matering	your	property

FM, Facilities Management	103	Conference Room
FM, Facilities Management	102	Administrative Support Office
FM, Facilities Management	100	Administrative Support Office
Property	Space number	Name
	Search	
Name		
Space number		
Property	FM, Facilities Management	

Figure 4: Searching and selecting a room based on a property

**Preferred billing account** you can enter a speedchart or chart fields for charge back orders.

The field **Department tracking info** is used if you want to track your own department tracking numbers. **Details** is where you further explain your request.

- 3. Attachment: Files. You may attach documents, photos, etc. by dragging and dropping file of clicking on the Drag & drop files here or Browse area
- 4. Click on the submit button when finished.

### **Confirmation page**

After submitting the request, you will see a confirmation page and will get an email acknowledging the submittal.

Confirmation					
<i>i</i> Many thanks for s	submitting your request. The Facil	ities Team will be in contact shortly.			
Order information					
Number *	374.00				
Description	Cleaning request				
Requestor information					
Requestor	000018341 Cynthia Masner				
	Email	Cindy.Masner@csulb.edu			
	Department	Department of Athletics, D3.D3_010.D3_010_010.00179			
Submitted on behalf of	Leah, Williams, Leah.Williams-Daniels@csulb.edu, 562/985-5722				
Department	Department of Athletics				
Location of work					
Property *	FM, Facilities Management				
Space	103 - Conference Room				
Requested completion date- time	💄 Thursday, June 27, 2019 04:16	PM			
Asset Ex. vehicles, clocks, et					
Billing information					
Preferred billing account					
To be approved by	Tiffany, Edlin, Tiffany.Edlin@csulb.	edu, 562/985-1626			
Departmental tracking	LA-1234-HS-32				
Work details					
	Close	Edit			
	Many thanks for      Order information      Number *     Description      Requestor information      Requestor information      Requestor      Submitted on behalf of     Department      Location of work      Property *     Space     Requested completion date- time     Asset Ex. vehicles, clocks, et      Billing information      Preferred billing account     To be approved by     Departmental tracking	Wany thanks for submitting your request. The Facili         Order information         Number *       374.00         Description       Cleaning request         Requestor information         Requestor information         Requestor       000018341 Cynthia Masner         Email         Department         Submitted on behalf of         Department         Department of Athletics         Property *         Space         Requested completion date- time         Asset Ex. vehicles, clocks, et         Billing information         Preferred billing account         To be approved by       Tiffany, Edlin, Tiffany.Edlin@csubb.         Departmental tracking       LA-1234-HS-32			

Figure 5: A sample of the confirmation page upon submitting a service request

You have the option to edit your submittal by clicking the Edit button.

Note: Once an order has been put in progress or assigned you cannot make any changes unless you call our Service Response team at 5-HELP.

Our Service Response team reviews the requests and routes it to the appropriate group where a work order is created and assigned to a supervisor to schedule or a an estimate gets created.

You will get four to five emails during the service request lifecycle.

- a. An email confirmation will be sent confirming the request.
- b. An email accepting the request with a new work order number and assigned to a trade supervisor to schedule the work
- c. An email to an approver if an estimate is required
- d. An email when a work order is service response approved meaning all work has been completed on the work order. Here you have a chance to check and verify that everything is correct before it is billed.
- e. An email stating the service request and work order are now completed and will closed or billed.

Request	confirmation	BEACH BUILDING SERVICES
Dear Walter Martinez,		
This is a confirmation fi and sent for approval.	rom BBS Service Response regarding your work request. When reviewed a work order will be created and assigned to a supervisor or manager to schedule or an estimate will be created	
Client		
Customer	Walter Martinez	
		3
<b>Request details</b>		
Request no.	144.00	Ì
Request description	Too cold 1	
Request details		
Location		
Property	FM Facilities Management	
Space		
man	and a start of the second and a start of the	and and and well

Request		BEACH					
accepted		B U I L D I N G S E R V I C E S					
Dear Walter Martinez,							
This is a confirmation from BBS Service Response regarding your work request. We have reviewed and accepted the request. A work order was created and assigned it to trade supervisor for review. The supervisor will either create an estimate if requested or will schedule the work to a technician							
<b>Requestor inform</b>	nation						
Requestor	Walter Martinez						
		2					
<b>Request details</b>							
Request no.	144.01	1					
Request description	Too cold						
Location		<b>&lt;</b>					
Property	FM Facilities Management						
		1					
Space		>					
Planning							
·	Friday, June 28, 2019 06:59 P	·M					
Planning	Friday, June 28, 2019 06:59 P	РМ — — — — — — — — — — — — — — — — — — —					

Figure 6. A sample emails sent to requestor confirming submittal of service request

## **Approving Chargeback Requests and Estimates**

The person who is in charge of approving chargeback estimates will receive an email with a link to approve the requests when chargeback work is requested. Approvers are automatically set based on the requestor's department. When this person changes please notify our IT department with a list of department IDs and the approver ID to make changes at <u>ppfm-is@csulb.edu</u>.

## Viewing requests waiting for approval

You can also see the requests waiting for approval under the Orders for approval gadget.

### Procedure

1. Click on the Orders for approval gadget on your My Planon screen

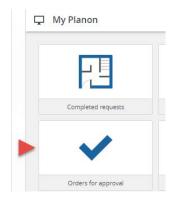


Figure 7: Selecting Orders for approval from My Planon

2. Select the order number you want to approve

Orders to be appro	ved				
To be approved by	Tiffany Edlin				
	Search				
					< 1 - 1 of 1 >
Approval Numbe sent on	r Description	Status	Cumulative estimate	Requested completion by	Requestor
6/12/2019 08:11 406.00 PM	Locks or keys hardware install or adjustments	Obtain approval	\$ 1,566.51	7/1/2019 09:00 AM	Cynthia Masner

Figure 8: Selecting an order for approval from the list

- 3. Once the Request details page appears scroll down to the Approve or Reject costs buttons and review the estimate costs. Select Approve to accept the costs. Select Reject to receive another estimate or specify in the comments box that you want another estimate or you want to cancel the request.
- 4. When selecting approve, the Edit request window will appear and you will have a chance to write a note in the Communication logs field.
- 5. Click Submit to finalize the Request
- 6. Once approved, the trades will start scheduling the work

## Checking the status of your orders

#### Procedure

1. Go to My Planon and select My active requests

My Planon	
	•
Completed requests	My active requests

Figure 9: Selecting My Planon and viewing requests

2. The My requests window will open. You can start a search for an order here or select an order from the list. You can also print the list by clicking the printer button.

M	My reque	ests								
									•	
	Requestor		00001834	1, Masner, Cynthia						
	Order numb	er								
	Description									
	Property									
	Dept tracking	g								
				_						
			Searc	h						
								< 1-	20 of 31 >	
	Reported	Manager	Description	December	C	Dept	Requested	Technician can start	Carry	<b>Figure 10:</b> My Requests screen
	on	Number	Description	Property	Space	track	completion by	can start	Status	
							-			
	6/11/2019 03:56 PM	374.00	Cleaning request	FM, Facilities Management	103 - Conference Room		- 6/27/2019 04:16 PM		In progress	
	6/11/2019	370.00	Unlock classroom	ET, Engineering	g 239 - Teaching				In	
	11:08 AM			Technology	Lab				progress	
	6/11/2019	369.00	Too cold 88	FM, Facilities	105 - Conference				Reported	
	09:39 AM			Management	Room					

3. The details window appears with the status and order details. Click the Back button to go back to the list.

0	Details		
	Order information		
	Number *	374.00	
	Description	Cleaning request	
	Requestor information		
	Requestor	Cynthia, Masner, Cindy.Mas	mer@csulb.edu, 562/985-8527
	Submitted on behalf of	Leah, Williams, Leah.Williar	ns-Daniels@csulb.edu, 562/985-5722
	Department	Department of Athletics	
	Location of work		
	Property *	FM, Facilities Management	
	Space	103 - Conference Room	
	Requested completion date- time	💄 Thursday, June 27, 2019	9 04:16 PM
	Asset Ex. vehicles, clocks, et		
	Billing information		
	Preferred billing account		
	To be approved by	Tiffany, Edlin, Tiffany.Edlin@	)csulb.edu, 562/985-1626
	Departmental tracking	LA-1234-HS-32	
	Work details		
	Material costs		
	Labor hours cost		
	Status *	In progress	
	Status since	💄 Tuesday, June 11, 2019	04:35 PM
	Details	Please clean the soda spill i	in the conference room
			Back

Figure 11: Details and status on the Request

## Checking the status of your department orders Procedure

1. Go to May Planon and select My department active requests under My Planon

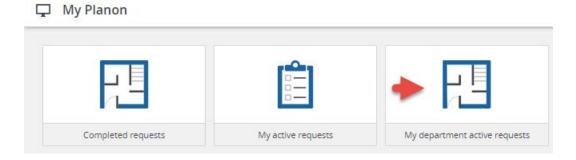


Figure 12: Select My Departments active requests to view the status on your department orders

2. The Requests list will open.

4	Active re	equest li	st								3
	Departmen	ıt	Dep	partment of Athletics							
			2	Search							
										$\langle \rightarrow$	
	Number	Reported on	Requestor	Description	Department	Dept tracking	Billing Type	To be approved by	Status	Last updated	
	315.00	6/7/2019 08:38 AM	000035202, Edrington, Mark	Clock repair	Department of Athletics	f	ChargeBack, Charge Back			6/7/2019 08:38 AM	
	316.00	6/7/2019 08:47 AM	000018341, Masner, Cynthia	Leaky faucet, sink or toilet	Department of Athletics	Ī	ChargeBack, Charge Back			6/7/2019 08:47 AM	
	317.00	6/7/2019 08:50 AM	000018341, Masner, Cynthia	Too cold	Department of Athletics	Ī	ChargeBack, Charge Back			6/7/2019 08:50 AM	
	341.00	6/10/2019 08:34 AM	000018341, Masner,	Change Light bulbs 99	Department of Athletics	Ī	No Charge, No Charge	016544552, Edlin,		6/10/2019 08:34 AM	

Figure 13: Viewing and selecting an Order to see more information

3. The details window appears with the status and order details. Requests in status Reported are still editable as they have not been processed. Any other status is not editable.

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Order information	
Number *	317.00
Description	Too cold
Requestor information	
Requestor	Cynthia, Masner, Cindy.Masner@csulb.edu, 562/985-8527
Submitted on behalf of	
Department	Department of Athletics
Location of work	
Property *	FM, Facilities Management
Space	105 - Conference Room
Requested completion date- time	2
Departmental tracking	
Work details	
Status *	Reported
Status since	💄 Friday, June 7, 2019 08:50 AM
Details	Room is to cold.
	Back Edit
	Dack Eur

Figure 14: Details and status about the Order you selected. Orders in Status Reported can still be edited

## Viewing building and space categories

You can view each space category by selecting the Building and Spaces icon.

Type building acror	nym to start search	
Property	BH, Brotman Hall	
	Search	Fi

Figure 15: Type building acronym and select Search

Property	BH, Brotman Hall		
	Search		
			< 1 - 30 of 459 >
Property	Space number	Category	
BH, Brotman Hall	0227Q	Administrative Office	
BH, Brotman Hall	102	General Storage	
BH, Brotman Hall	103	Administrative Workroom	
BH, Brotman Hall	104	Administrative Workroom	
BH, Brotman Hall	105A	Administrative Support Office	
BH, Brotman Hall	105B	Administrative Workroom	
BH, Brotman Hall	106	Administrative Workroom	
BH, Brotman Hall	107	Administrative Support Office	
BH, Brotman Hall	107A	Administrative Office	
BH, Brotman Hall	107B	Administrative Support Office	
BH, Brotman Hall	107C	Administrative Support Office	
RU Brotman Hall			
BH, Brotman Hall	107D	Administrative Support Office	

Figure 16: Here is a listing of building, room numbers and categories.

You can also print and save this as a PDF.

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