



WHAT'S HAPPENING THIS MONTH – NOVEMBER 2019

Planon's Implementation Status

UBC is following Planon's accelerator implementation methodology to ensure Planon is configured to meet UBC's needs in the most time efficient manner possible. The Design, Configure & Prototype stages have been combined to further streamline the implementation process.



Planon Design Meetings Continue

To date, 21 design meetings have been completed with a significant amount of progress identifying Planon functional options to address UBC's pain points and required business processes. Shout out to Phase 1 stakeholders and EMMS functional team (Hayley, Evan, Patrick and Ron) who have participated in the heavy lifting to envision how Planon will be configured for UBC.

With any software implementation, there are trade-offs in terms of nice to haves and need to haves. The discussions have been lively in terms of identifying opportunities to simplify processes or validating the need to retain current processes which work well today. Participants have commented that it's exciting to see how Planon interfaces will be used to receive and manage incoming service requests, assign work orders for reactive and preventative maintenance and view critical information in the field about spaces and locations with hazard flags prior to work commencing.

Planon Begins Configuration

The configurable nature of Planon will enable UBC to make changes over time as needed to support evolving business operations. Planon will use the Functional Specifications created by the EMMS functional team to begin configuring Planon. While adopting the majority of out-of-the-box functionality from Planon, there are instances where UBC will request a configuration such as a change in field name, addition of new fields that are required for business purposes or changes to a delivered workflow to include additional approval steps or routing to key individuals.



Deliverables this Month

1. Creation of Functional Specification documents which will be used by Planon to configure UBC's environment for maintenance, asset and inventory management. Ongoing to December.
2. Planon begins configuring UBC's solution on an iterative basis for review by UBC
3. Testing strategy approved in principal by the Process & Outcomes Committee (POC) – watch for news item this month
4. Training strategy approved in principal by the Process & Outcomes Committee (POC) – watch for news item this month