



## EMMS TALKING POINTS ~ January 2020

### Planon Configuration Stage Begins

What a way to start the new year! Following months of hard work by dozens of people and hundreds of hours of Design meetings to explore how to leverage Planon's capabilities, we're beginning the next step in the EMMS project, Planon's Configuration stage!

Over the next few months, Planon's technical development team will generate the first of two configurations based on UBC's Functional Specifications for maintenance, asset and inventory management. To the greatest degree possible, UBC will adopt Planon's delivered or out-of-the-box processes and workflows to ensure UBC stays current with Planon's ongoing software upgrades.

What does this mean? Any of the configurations that have been requested by UBC have been carefully evaluated by Business Functional Leads (BFLs) and subject matter experts from Building Ops, Energy & Water Services and Chemistry Stores to meet UBC's operational needs.

As we progress in the configuration stage, our intent is to schedule sessions for staff to socialize some of the anticipated changes working with a new tool, Planon and streamlined processes. Stay tuned for details.

### Key Messages

- Planon will replace existing paper forms with electronic forms
- Planon will deliver a transparent workflow from initiation to approval of tasks
- Planon will be integrated with key systems like Archibus and ArcGIS for staff to deliver a single view of information
- Staff will access Planon using desktop, tablet and mobile devices

### Questions and Answers

**Q: What happens during the configuration stage?**

*A: UBC will adopt the majority of Planon's business processes and workflows as delivered. However, there are some instances where UBC has requested changes to a business process, field name or workflow to meet UBC's requirements. Planon will complete configurations which will be reviewed by UBC to confirm if the business processes and workflow will work for UBC.*

**Q: When will staff get to see what Planon looks like?**

*A: As soon as the first configuration is complete, demos will be scheduled in February. Details coming.*

### Highlights of the Next 30 Days

- Planon configuration underway to enable first stage of testing by the EMMS Team
- Continue sample data migration to validate if data shown in Planon will meet UBC needs