

Welcome to the Workday/Planon Information Session

We will begin shortly.

- We have **muted your audio and turned off your camera** to ensure higher quality sound during the session.
- We will **answer questions throughout the session** as time allows.
 - Click on the **Chat** icon at the bottom of your screen in Zoom
 - Type in your questions and view questions from colleagues
 - Moderator will pose questions to the host
 - Moderator may call on you to ask your questions





WEEKLY CALL-IN



Today's Topic: Schedule Resources using
Resource Planner

JUNE 18 & 23, 2020



YOUR HOSTS



Deb Capps



Marnie Anderson



Ron Hing



Evan Colville



Patrick O'Connell





TODAY'S DISCUSSION

Roadmap to Go Live

Follow-up from last Call-in

What to Know this Week

Planon Call-in Schedule

What's Changing: Schedule Resources using Resource Planner

Planon Demo & FAQs

Explore on your own

OUR ROADMAP TO PLANON GO LIVE



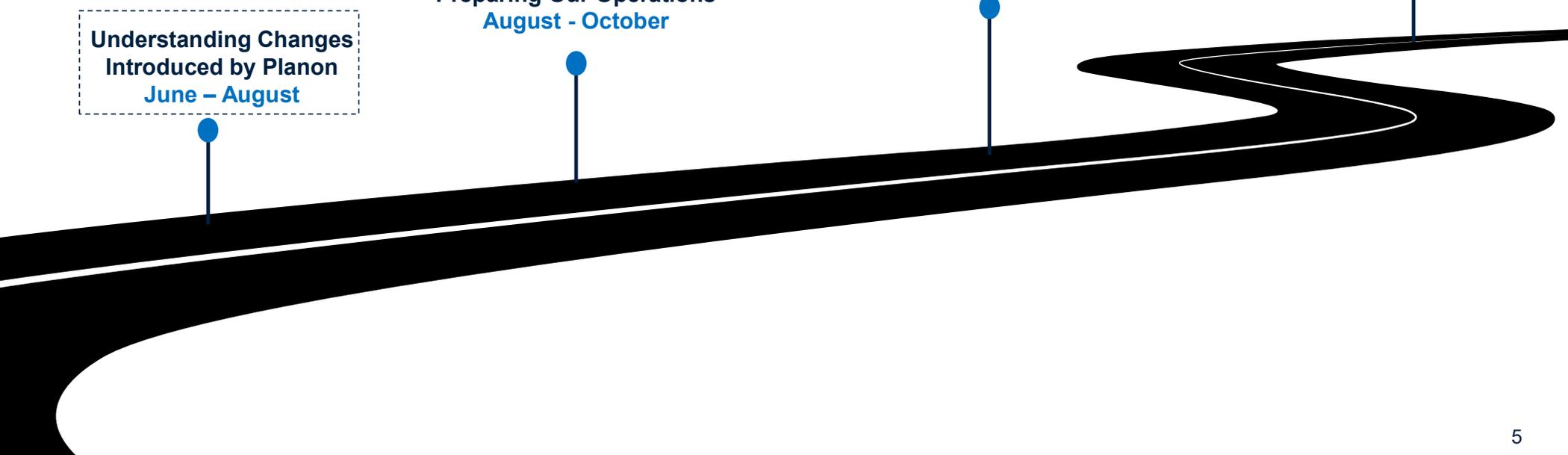
Go Live November 2020



Getting Hands-on Training
September - October

Preparing Our Operations
August - October

Understanding Changes
Introduced by Planon
June - August





**91 WORKING DAYS TO PLANON
GO LIVE NOVEMBER 2, 2020***

* Subject to change based on Workday Go Live date 6

FOLLOW-UP FROM LAST CALL-IN





ZONE MODEL AND BILLING

Q. For the zone model, what will happen with the two free days labour?

A. There will be a Billing Type called “No Billable Labour Zone - No Labour Charges” that zone work orders will be setup with.

St...	Code	Description
<input checked="" type="checkbox"/>	CORE	Core Funded - No Labour Charges
<input checked="" type="checkbox"/>	NBLCORE	No Billable Labour Core - No Labour Charges
<input checked="" type="checkbox"/>	NBLZONE	No Billable Labour Zone - No Labour Charges



ZONE MODEL AND BILLING

Q. Heads currently charge their time to a standing supervision number. What will happen in Planon?

A. We will have a similar set of work orders setup for heads to charge their time.



STANDING WORK ORDERS AND TIME ENTRY

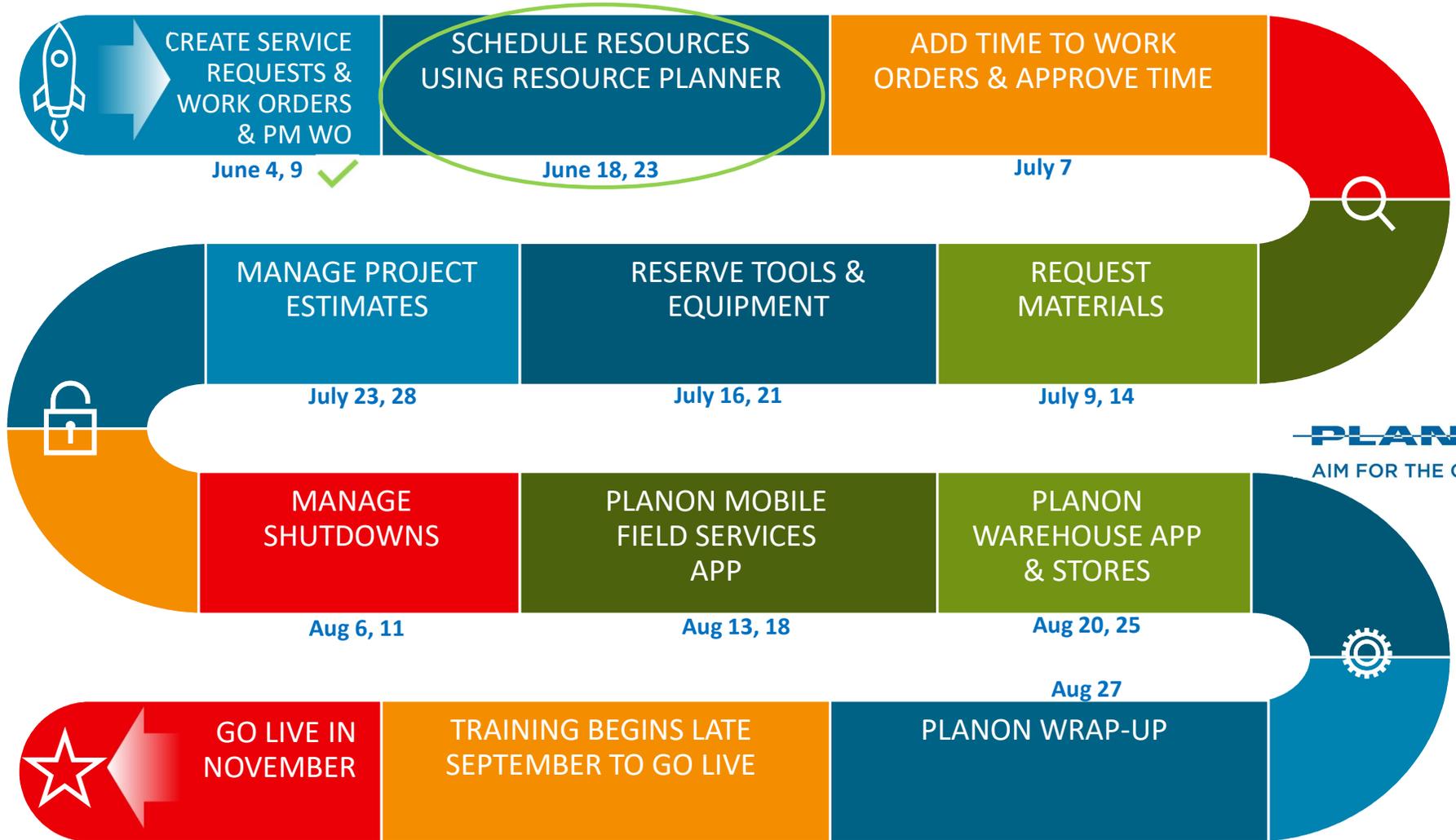
Q. If there are no standing work orders, where do staff charge time that is not associated with an asset? For example, crew talks, events, estimating time.

A. We will have a similar set of work orders setup to charge crew talks, events, estimating etc. They will be accessible on the electronic timecard.

WHAT TO KNOW THIS WEEK



PLANON CALL-IN SCHEDULE





RESOURCE PLANNER



Today

Planon

Each division manually schedules work (paper, calendar, spreadsheet, verbal)	➤ Use graphical, drag/drop calendar functionality to schedule staff and assign Work Orders
Use of Standing Work Orders for majority of maintenance work	➤ No standing Work Orders for Reactive Maintenance ➤ Work order(s) are generated for every Service Request; planned, scheduled and assigned to technicians
Lack of resource availability within each shop and across shops	➤ Complete visibility of all resources across shops with absences from Workday
Heads communicate with one another for Work Orders requiring multiple shops to complete in a sequential order	➤ Facilitates scheduling and sequencing of multi-trade work assignments
Heads check technician certifications from a spreadsheet	➤ Certification check for technician prior to work assignments (Stream 2)

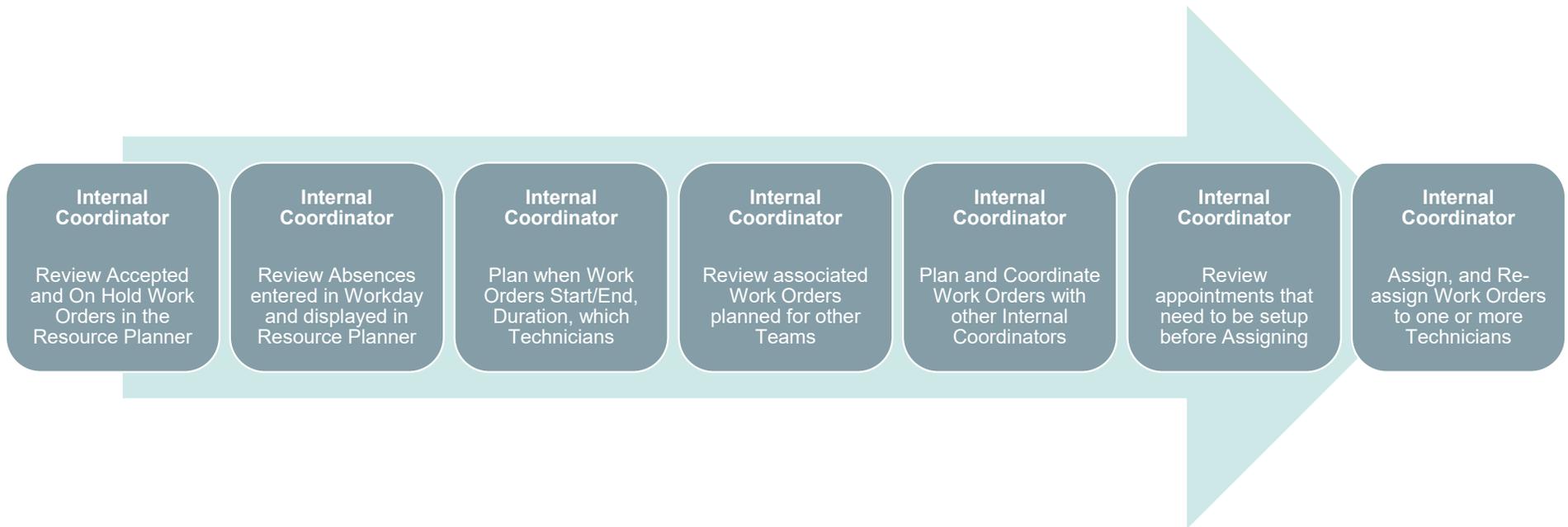
LET'S SEE PLANON





SCHEDULE RESOURCES

Resource Planner is a graphical planning tool to plan and assign work orders.



Team – Shop (e.g. B21 Electrical Services)

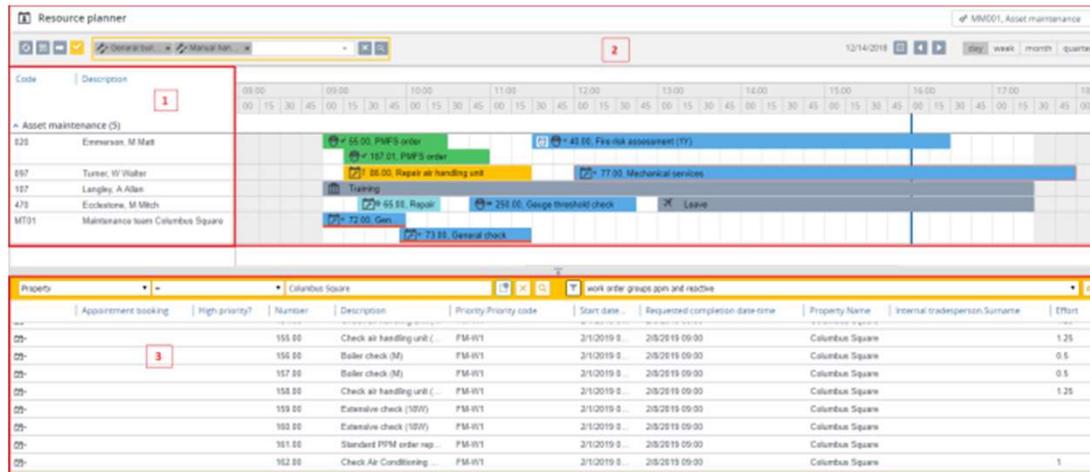
Internal Coordinator – Shop Head/Subhead (e.g. B21H, Electrical Services Heads)

Internal Tradesperson – Technicians (i.e. Members of a Team)

Resource Planner – Where an Internal Coordinator can graphically plan and assign Work Orders

RESOURCE PLANNER

Resource Planner is a graphical planning tool to plan and assign work orders.



Colour Legend

	Orders
	Orders on hold
	Orders outside working hours
	Unavailability
	Temporarily fixed orders
	Completed orders
	Overlapping orders

1. Resources panel – displays the maintenance teams
2. Planboard – displays the time lines and the work allocated
3. Unplanned orders panel – lists the orders that are waiting to be planned



Workday will send personnel information to Planon to show staff availability (vacations, sick training, etc.)

Note: Shift differentials and overtime rules will be calculated in Workday for payroll.



FREQUENTLY ASKED QUESTIONS



Q: Will the resource planner auto-populate once an automated Work Order is accepted by a field technician?

A: Yes, the Resource Planner shows that the Work Order is accepted by the technician.

Q: Can technicians change their individual plan? For example, if a work order takes too long, can they move the following one themselves to the next day?

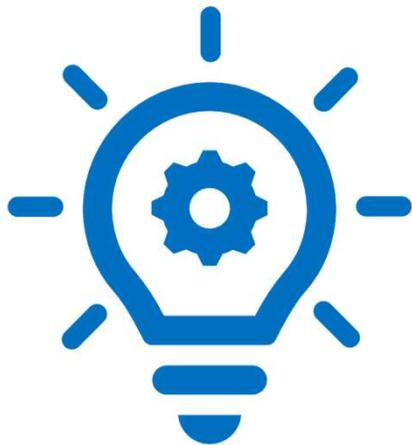
A: The plan does not need to match the actual work. The Head creates the planned dates and duration. The technician can then work on the Work Order until it's completed and then send it back to the Head.

Q: Can a task be linked to another task, i.e. is there logic between tasks?

A: Each SR can be linked to one or more Work Orders.

- Each Work Order is assigned to a team.
- Work Orders can also have Sub-Orders. The Work Order can indicate that all Sub-Orders need to be completed before the Work Order is indicated as complete.
- Sub-Orders are also used to sequence work within a Team.

DID YOU KNOW?



When Planon goes live, **standing work orders** will be replaced with standard work orders, which will be created for each Service Request to simplify billing and analysis at the property and asset level.

EXPLORE ON YOUR OWN





JUNE PLANON/WORKDAY SCHEDULE

DATE	APPLICATION	TOPIC
18-Jun	Planon	Schedule Resources using Resource Planner
23-Jun	Planon	Repeat
25-Jun	Workday	Wrap-up - Sign up Workday 101
30-Jun	Workday	Repeat



JULY/AUGUST PLANON CALL INS

JULY	
07-Jul	Add Time to Work Orders & Approve Time
07-Jul	Repeat
09-Jul	Request Materials
14-Jul	Repeat
16-Jul	Reserve Tools/Equipment
21-Jul	Repeat
23-Jul	Manage Project Estimates
28-Jul	Repeat
AUGUST	
06-Aug	Manage Shutdowns
11-Aug	Repeat
13-Aug	Planon Mobile Field Services App
18-Aug	Repeat
20-Aug	Planon Warehouse App
25-Aug	Repeat
27-Aug	Planon Wrap-up

WAYS TO LEARN ABOUT PLANON - [HTTPS://EMMS.UBC.CA](https://emms.ubc.ca)



1. Download 1-2 info sheets summarizing:
 - [What's Changing with Planon – Reactive Maintenance](#)
 - [What's Changing with Planon – Resource Planner](#)
2. See "[What's Happening](#)"
3. [Email](#) your questions.





ADDITIONAL FAQ'S

Question	Answer
What if our team composition for "internal tradesperson" changes day by day and is not set?	Typically, teams are setup and not changed day to day. If the technicians move around day to day it would be best put the technicians in a bigger team instead of smaller teams.
If the planner were to set up a year's worth of inspections would they be populated in the resource planner calendar or would it need to be accepted by the Head and added to a technician's timeline? This may be more of a process question rather than a Planon question.	Yes, this is up to each team. When PM Work Orders are generated they can be set so the Head assigns the Work Order to the Technician or the PM Work Order can be set to assigned directly to the Technician and the Head does not need to manually assign the Work Order.
Can a zone technician use this page to plan their work and schedule it?	The Resource Planner is not setup for Zone Technicians and the plan was for the Resource Planner to be used by the Head.
In some cases, we have provided an estimate to the client on how much time the Work Order will take to complete. Is there a prompt during the resource scheduling process that would give the scheduler that estimate info? Also, a prompt that lets the scheduler know that you have gone over the estimated time line?	Yes, the Work Order is tied to the Service Request which will contain the estimate. There is no functionality to let the head know that the estimate is exceeded.



ADDITIONAL FAQ'S

Question	Answer
For Work Orders with several trades, once scheduled, how does Planon address re-scheduling if a task cannot be completed as schedule (the worker cannot attend the task as planned and I doing it at, say, two days after it was scheduled), would Planon re-schedule sequence of tasks to account for that delay.	<p>The Work Order contains planned dates. When the Work Order is scheduled in the Resource Planner, there are assigned dates.</p> <p>A Work Order can be re-assigned or rescheduled at any time which will change the assigned dates.</p>
In some cases, we have provided an estimate to the client on how much time the Work Order will take to complete.	<p>Yes, the Work Order is tied to the Service Request which will contain the estimate.</p>
Is there a prompt during the resource scheduling process that would give the scheduler that estimate info? Also, a prompt that lets the scheduler know that you have gone over the estimated time line?	<p>There is no functionality to let the head know that the estimate is exceeded.</p>
For Work Orders with several trades, once scheduled, how does Planon address re-scheduling if a task cannot be completed as schedule (the worker cannot attend the task as planned and I doing it at, say, two days after it was scheduled), would Planon re-schedule sequence of tasks to account for that delay.	<p>The Work Order contains planned dates. When the Work Order is scheduled in the Resource Planner, there are assigned dates.</p> <p>A Work Order can be re-assigned or rescheduled at any time which will change the assigned dates.</p>