



FINAL WEEKLY CALL-IN



Today's Topic: Planon Wrap-up

AUGUST 27, 2020

YOUR HOSTS



Deb Capps



Marnie Anderson

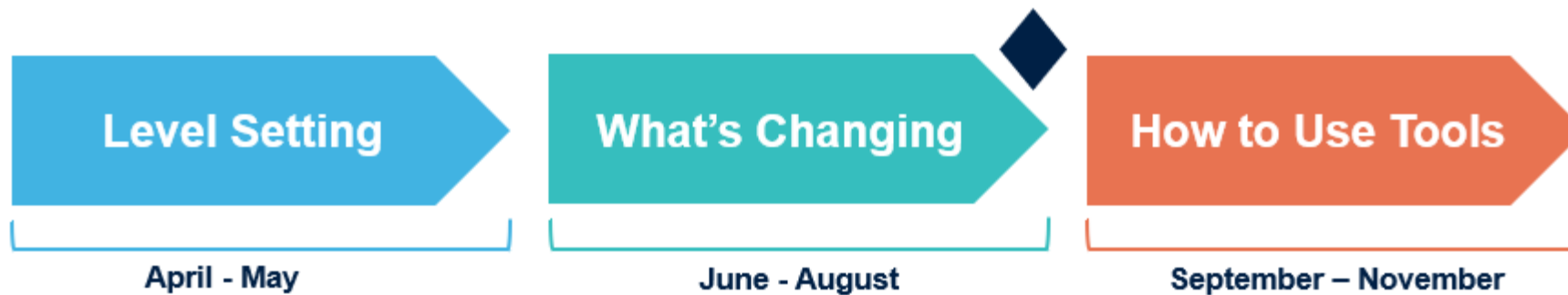




LOOKING BACK ON WHERE WE STARTED

Goals of the Getting Ready for Planon Call-ins:

- Offer an opportunity to learn together
- Connect the dots on what will be different in the future
- Provide a Q&A forum to deepen understanding
- Accelerate learning prior to hands-on Planon training





TODAY'S DISCUSSION

Top 10 Things We've Learned about Planon

Planon Workday Connections

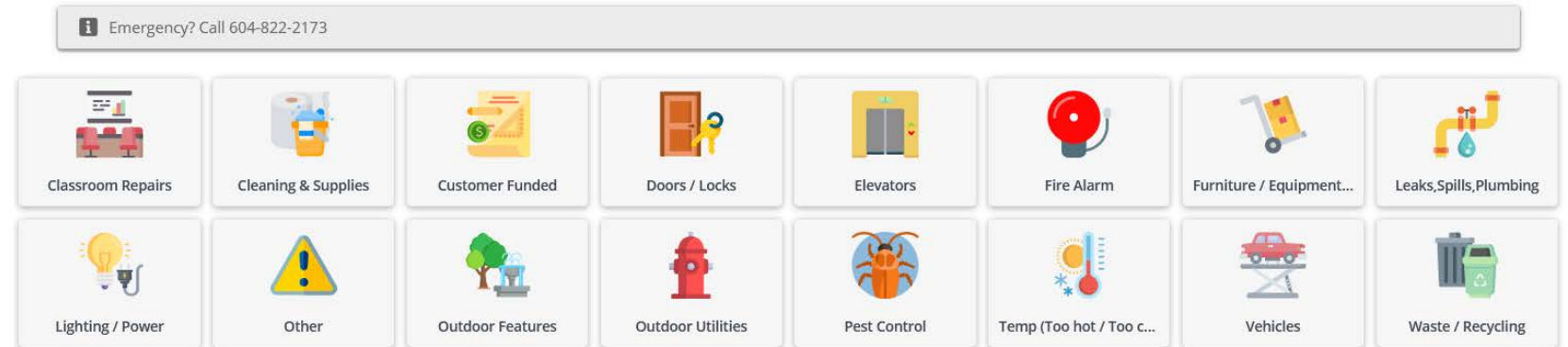
Planon Training

PLANON RECAP



Building Administrators will select a Service Request and complete a questionnaire.

1



1. Core SRs will be automatically forwarded to Heads/Subheads for scheduling.
2. If customers allocate billing information to their request, SRs are routed to Service Centre to verify billing.

Service Requests (SR) generate a Work Order which are **connected numerically**:

2

Service Request # 1465.00

Work Order # 1465.01

Sub Order # 1465.02

Sub Order # 1465.03

Heads, Subheads and Technicians can create a sub-order(s) as needed.



Heads and Subheads will use Resource Planner to **plan and schedule** all work orders.

3

Planon will be integrated with Workday to view staff availability to schedule work.

		09:00		10:00		11:00		12:00		13:00					
		30	45	00	15	30	45	00	15	30	45	00	15	30	45
^ B21 Maintenance Electrical Trad...															
1713213	Carpenter, Mike	I (NBLC Core) BOps FACILITI... ★ 🤖 ! 866.01, B21M (External) BOps EXTERNAL Request:... ★ 🤖 ! 867.01, E													
5351995	Gee, Richard														
1644017	Cupples, Douglas														
1850806	Franchuk, Jeff														
1295527	Iampietro, John														
3130355	Ram, Neil														

Heads, Subheads and Technicians will **reserve tools or equipment** using a visual calendar showing availability.

4

Reservations are associated with work orders.



The screenshot shows a software interface for tool reservations. At the top, there are two tabs: "Graphical view" (selected) and "List view". Below the tabs is a table with a header row for time slots from 00:00 to 09:00 in one-hour increments. The table contains four rows of work orders, each with a unique ID, description, and a "More info" link. The reservation grid is currently empty. At the bottom left is a "Cancel" button, and at the bottom right is a "Continue" button.

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00
TC02844-082. 14.4 VOLT CORDLESS DRILL More info										
TC02844-099. 14.4 VOLT CORDLESS DRILL More info										
TC02844-100. 14.4 VOLT CORDLESS DRILL More info										
TC02844-133. 14.4 VOLT CORDLESS DRILL More info										

5

Heads, Subheads and Technicians will see **real-time inventory for stock items** and place request for stock/non-stock materials via mobile or desktop.

Notification when ready for pick-up.

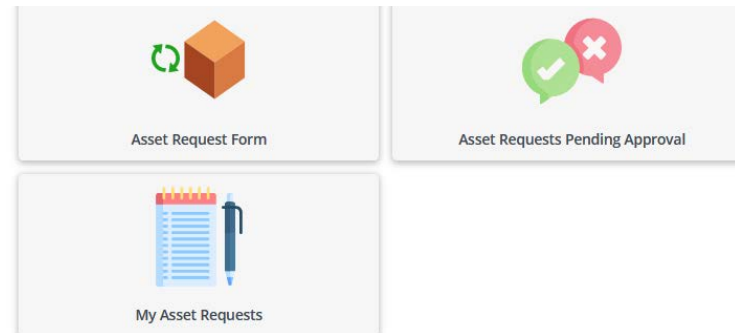
Ability to pre-order materials for PMs.

6

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.

A set of pre-defined assets have been pre-loaded to Planon. Thereafter, **new asset requests and approvals** will be managed in Planon.

7 Asset tagging will begin post Go-Live (process in progress). Also, technicians can capture images of assets on mobile.



8

Technicians will use **electronic checklists** on the Planon Mobile Field Services (PMFS) app for preventative maintenance.



9

For customer-funded requests that require an estimate, requestors will be able to **view and approve** the estimate in Planon before the work proceeds.



10

No more paper timecards! **Electronic timecards** will be completed using both:

1. PMFS app in real time in the field by work order
2. Web client (desktop/tablet) at the end of the shift

Non-work order time options available.

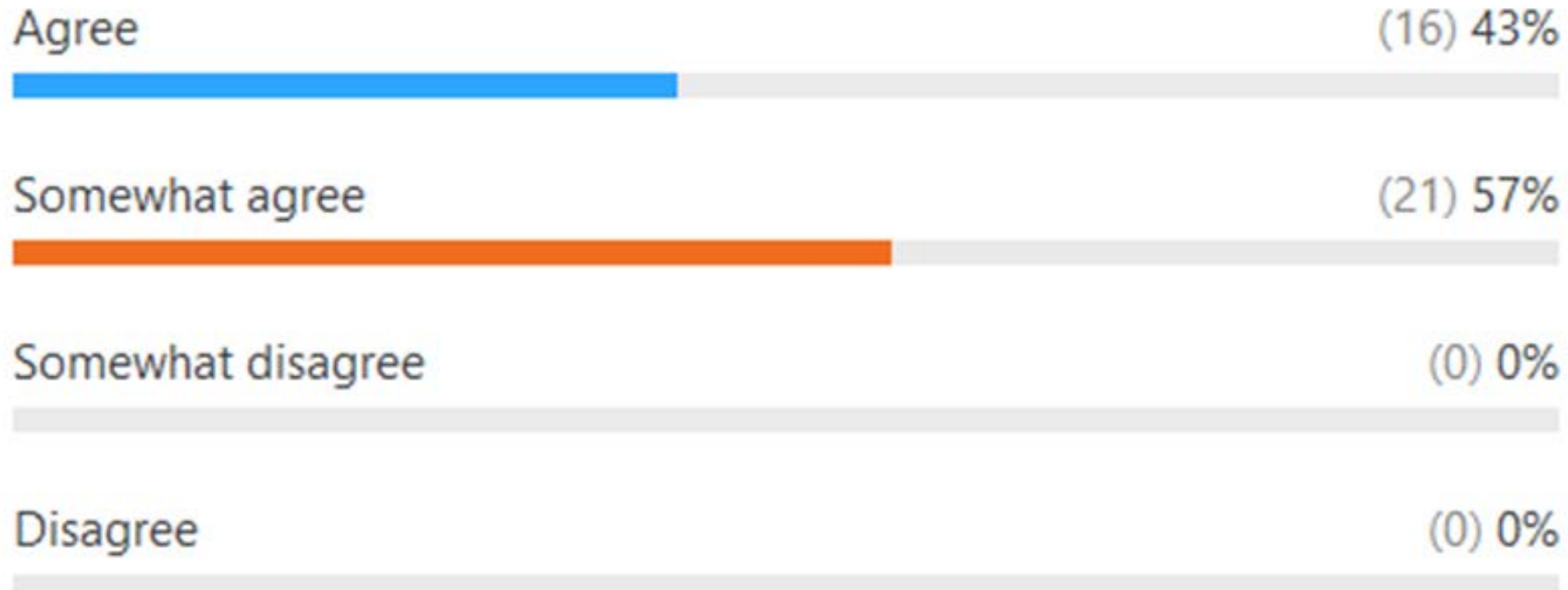
CHECK IN





POLL 1

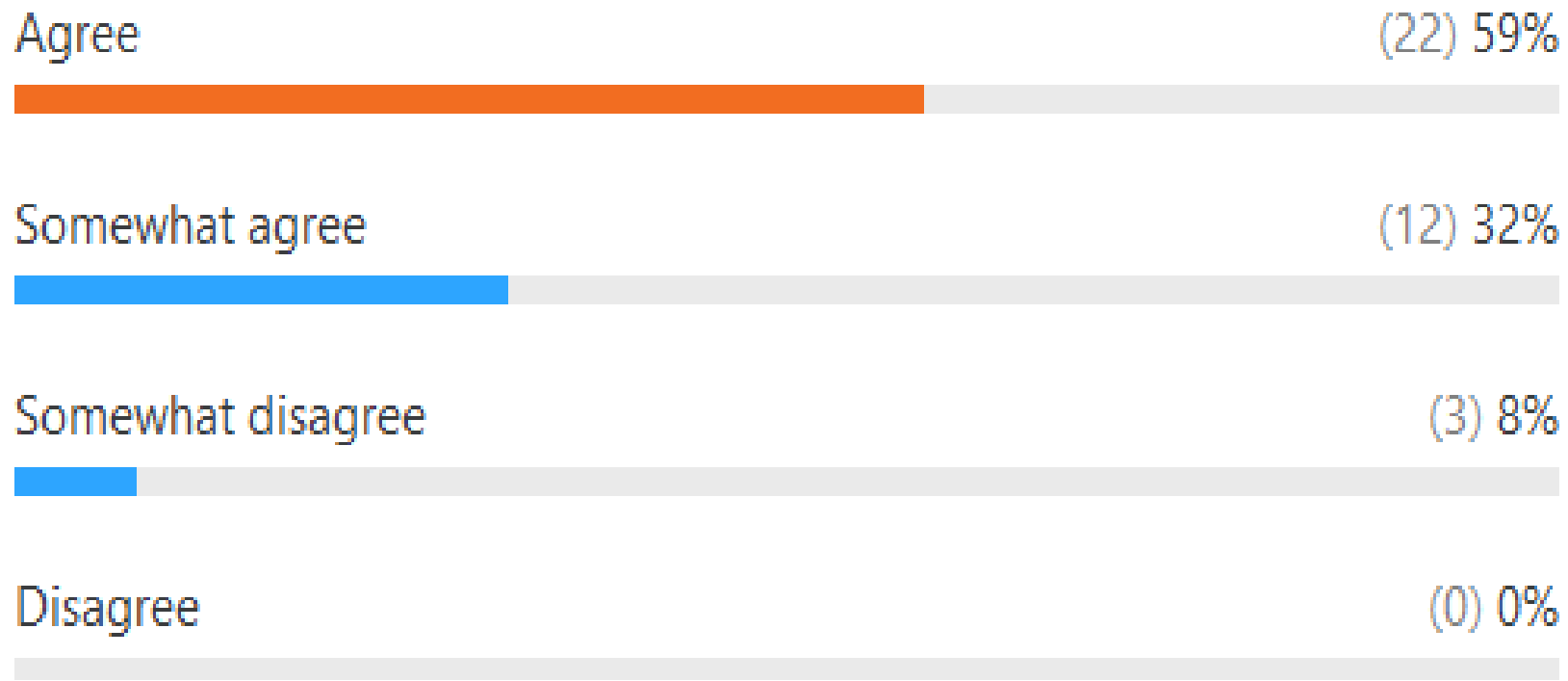
1. I understand the Planon concepts presented during the call-ins:





POLL 2

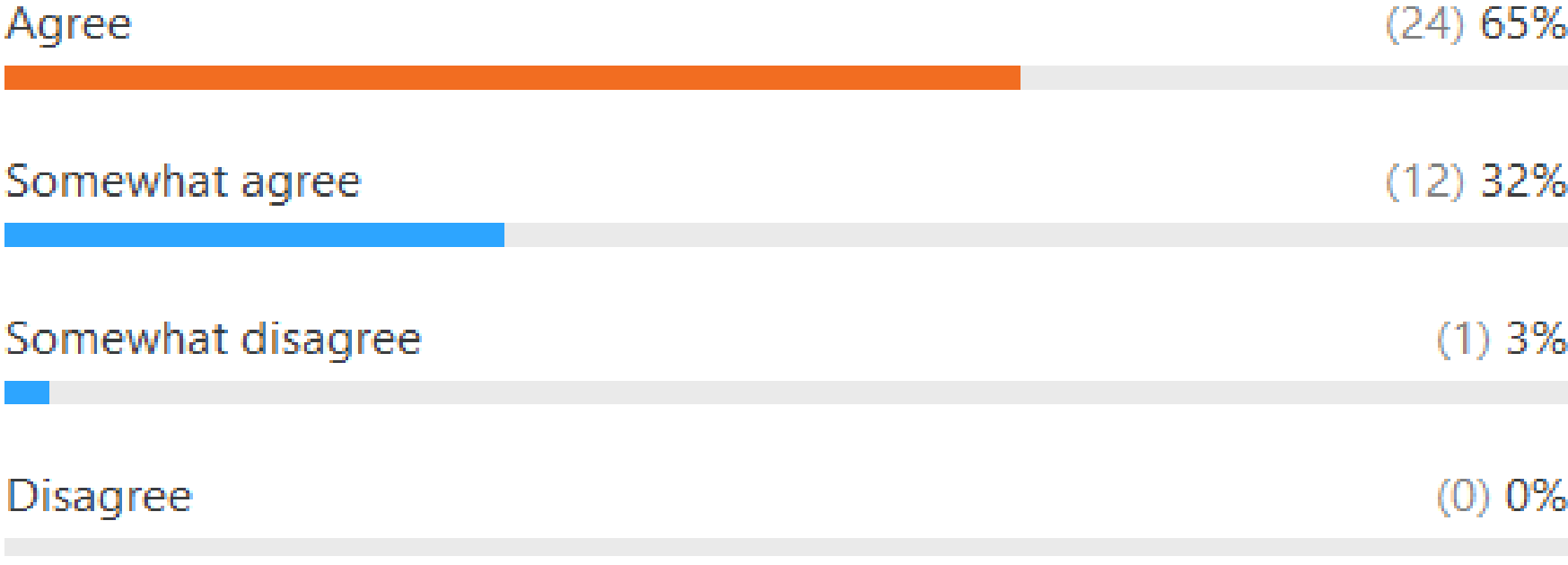
2. I support the Planon concepts presented during the call-ins





POLL 3

3. I'm looking forward to the changes that Planon brings



PLANON & WORKDAY

INTEGRATIONS ELIMINATE DUPLICATE DATA ENTRY





Staff will use Planon to enter time against work orders.

Staff will use Workday self-service to submit an absence request, or absence reason is entered by Head or Subhead.



Staff absences from Workday will populate:

1. Planon's Resource Planner (to show who is available to schedule work assignments)
2. Planon electronic time cards (to simplify time entry for staff)



Workday is the source for Cost Centre information.

For customer-funded service requests, cost centre details will be pre-populated in Planon based on the requestor's (customer) billing information.

The Service Centre will confirm/modify billing information as required.



PLANON



workday[®]

Workday will be the source for all UBC suppliers (vendors).

The suppliers used most often by Building Ops and EWS will be loaded into Planon.

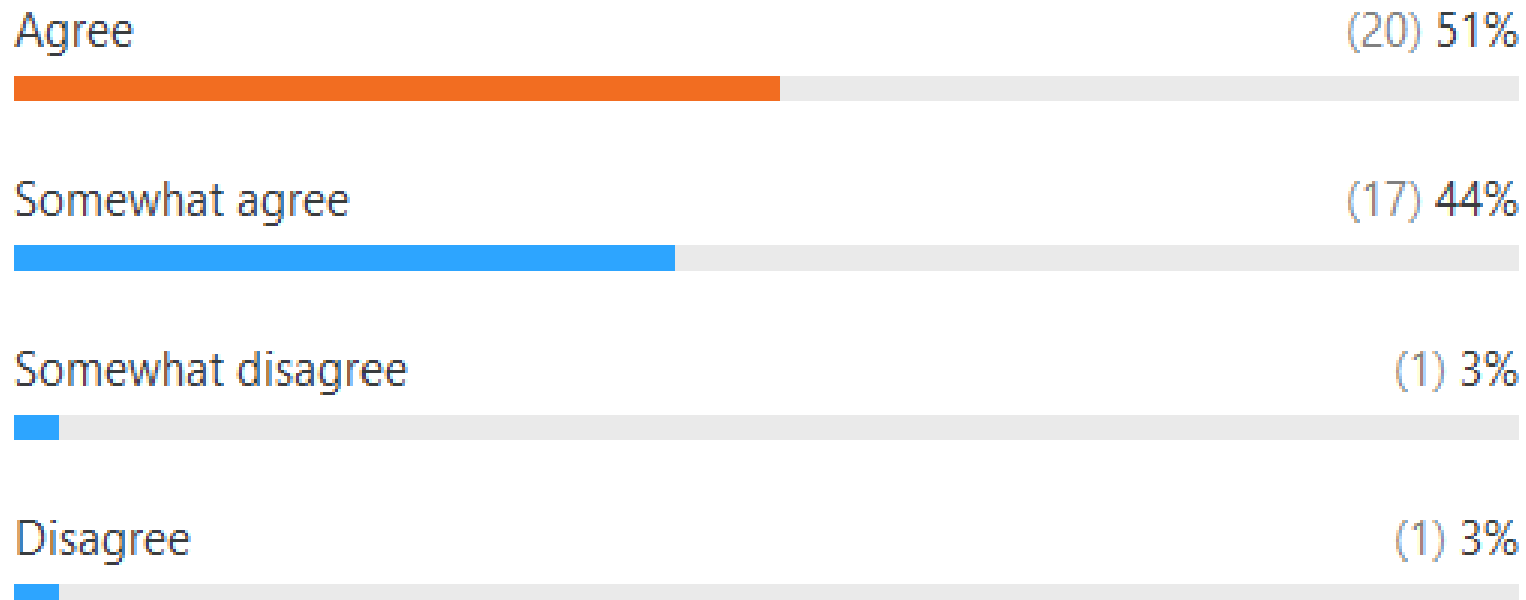
CHECK IN





POLL 1

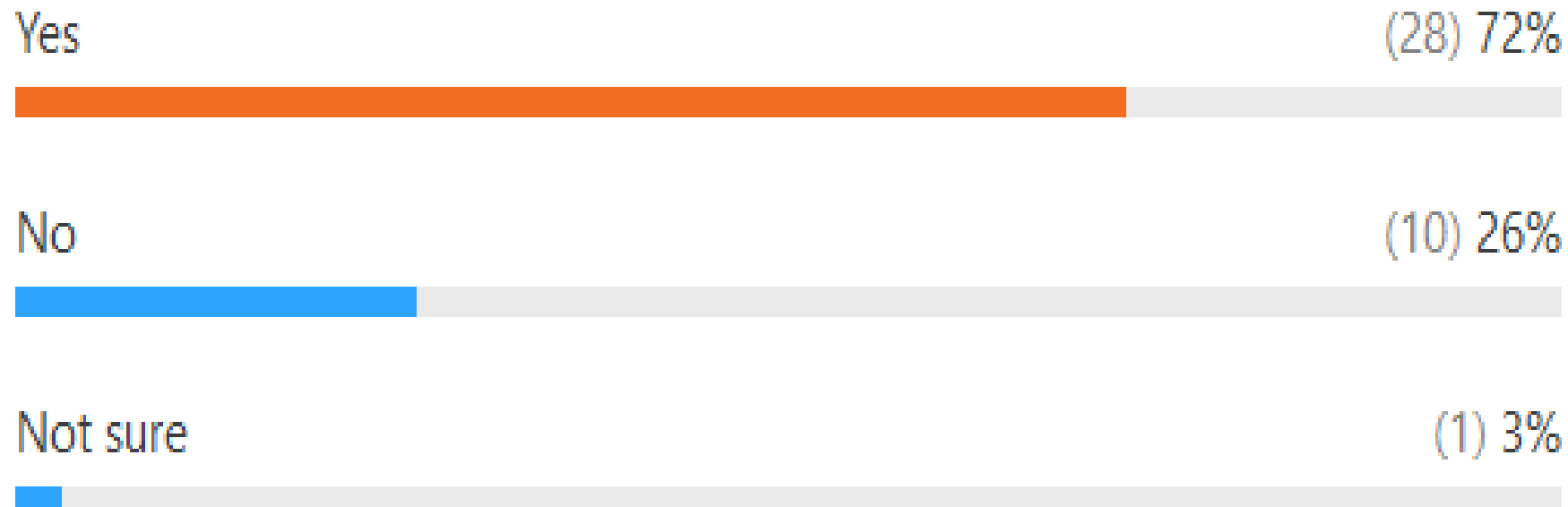
1. I understand the difference between how Planon and Workday will be used in my day-to-day work





POLL 2

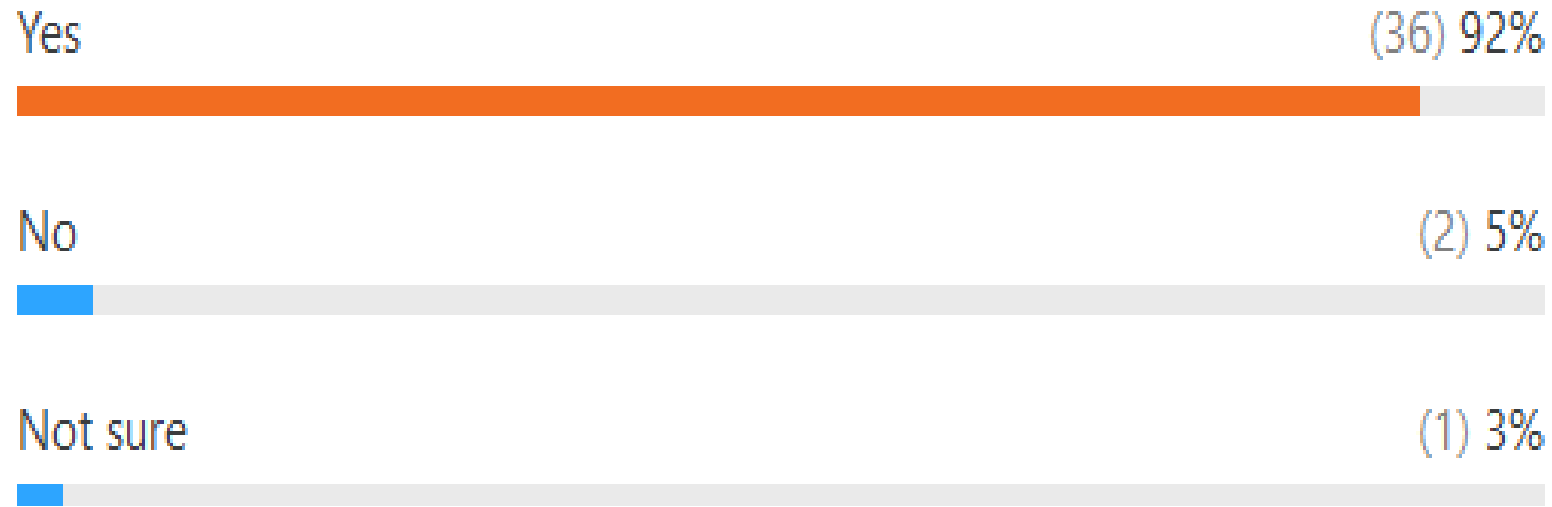
2. I have completed the Workday Basics or Workday 101 for Staff in Canvas





POLL 3

3. I plan on completing Planon 101 in Canvas prior to attending Planon training



PLANON TRAINING



TRAINING OVERVIEW

PRE-TRAINING

- ✓ **Getting Ready for Planon Call-ins**
- **Crew Talks** to socialize Planon with technicians (Sept. 8 – 30)
- **Canvas Self-Service** (Sept. 8 – Go-Live)
 - Planon 101 - Web Client users
 - Planon 101 - Planon Mobile Field Services (PMFS) app users
 - Planon 101 - Building Administrators Service Requests



TRAINING

- **Scheduled Zoom training sessions** (Sept. 21 – Oct. 30) with hands-on scenarios
- **Training cohorts** for Heads and Subheads; all other staff scheduled by roles and Planon functionality used
- **Technician training** by shop



POST-GO LIVE

- **Targeted training sessions** for areas identified where more support required
- Support options:
 - Buddy Network
 - Buddy Central
 - IT Service Centre (ITSC)



Build foundational knowledge.

Real-life scenarios to build confidence.

Reinforce skills to support day-to-day work.



KEY TRAINING DATES

Training Activity	Dates
EMMS Functional Team Training Prep	September 1 – 18 th
Train-the-trainer Training for Technician Training	September 28 – October 2 nd
Non-Technician Training	September 21 – October 30th
Technician Training	October 5 – October 30th

HEADS / SUBHEADS & PEOPLE MANAGERS

Sample schedule to be confirmed



- Training will be offered weekly to build knowledge & competence:
 - Week 1 – Resource Planner and Internal Service Requests
 - Week 2 – Timecard and OT Approvals
 - Week 3 – Purchasing
 - Week 4 – Tools & Equipment Reservations, Assets
 - Week 5 – Customer Funded Estimates
 - Week 6 – Planon Recap
- Training size is approx. 12 per session
- **Dates:** September 21 – October 30th
- **Est. Hours:** 12 hours (6 x 2 hours)

TECHNICIAN TRAINING



- PMFS app training will be offered on multiple days over several weeks to increase confidence in the field for Go-Live
- Delivered on mobile devices in large lecture halls or open air, covered environments in groups of 5-7 per session
- Training schedule managed by designated Train-the-trainer in consultation with the Head/People Manager
- **Dates:** October 5 – October 30th
- **Est. Hours:** 4 hours (4x1 hour)

PLANON SANDBOX



A sandbox Planon environment will be available late September (TBD)

- Staff will be able to explore on their own
- The environment will be based on a snapshot of the training environment
- It will be refreshed to its initial state once a week
- It will not be integrated with any other systems
- It will not be supported by the EMMS team

THANKS FOR MAKING TIME EVERY WEEK TO ATTEND

