CALIFORNIA STATE UNIVERSITY
LONG BEACH
TRAINING AT THE BEACH

BEACH
BUILDING
SERVICES

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 http://sso.csulb.edu and select the Beach Building Services chiclet or https://ppfm.csulb.edu 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.

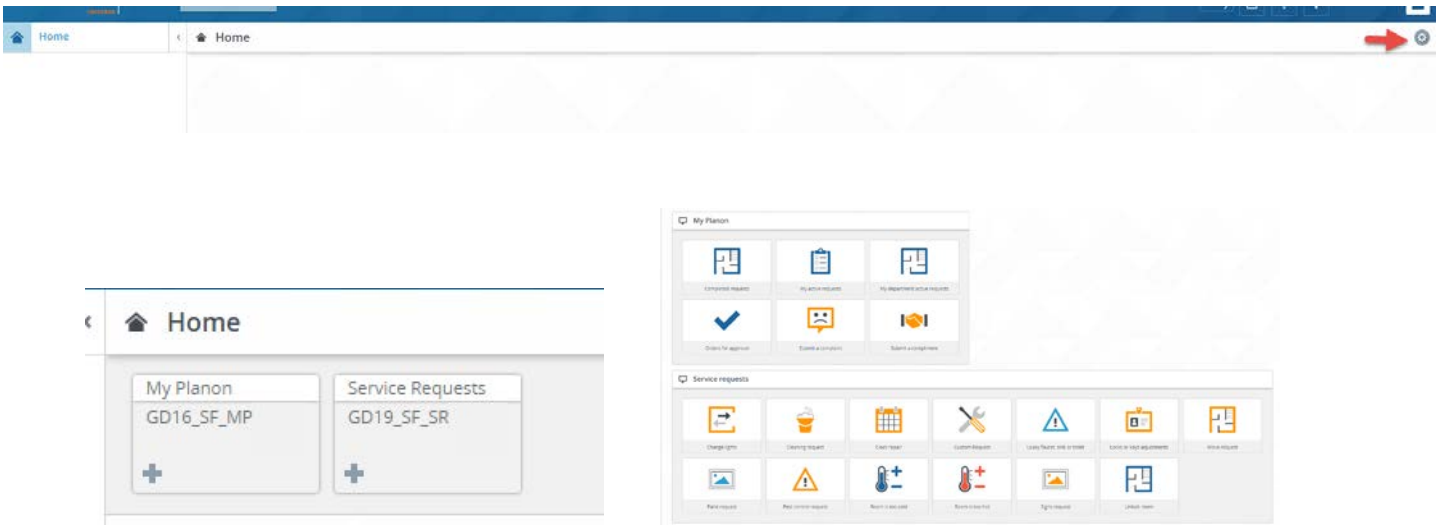


Figure 0: Adding chiclets to your Planon workspace

Navigating the gadgets page

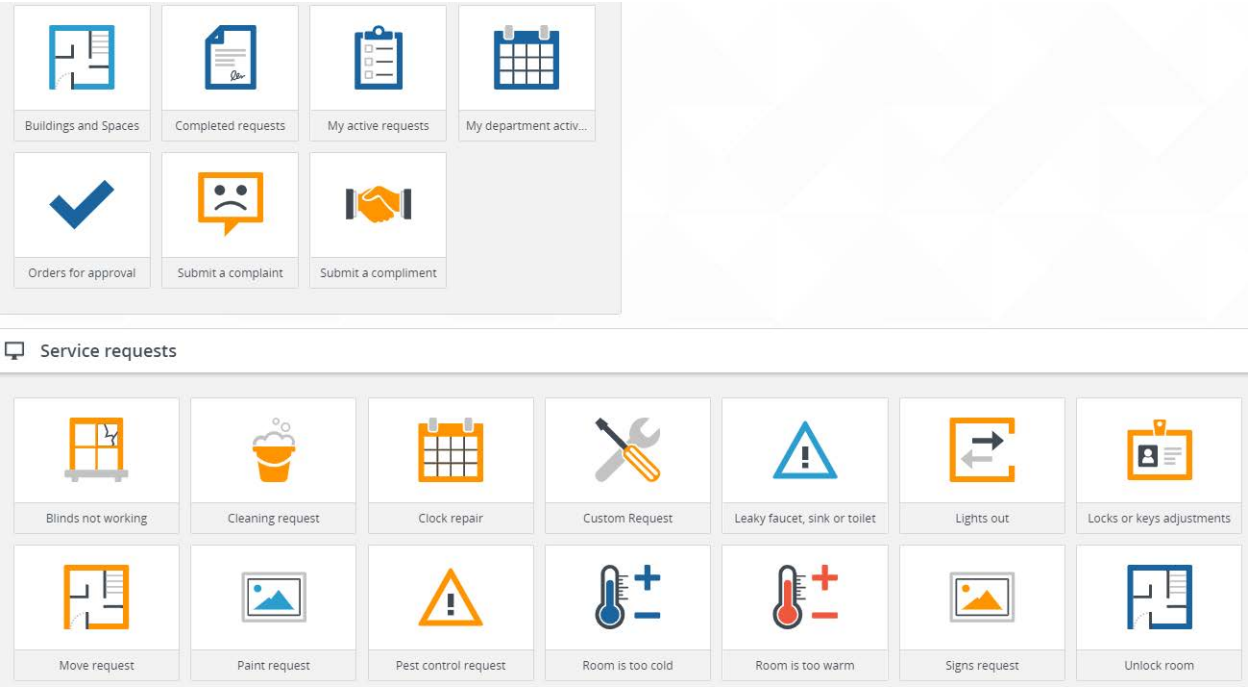


Figure 1: Dashboards with chicklets that you see upon logging into Planon

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.

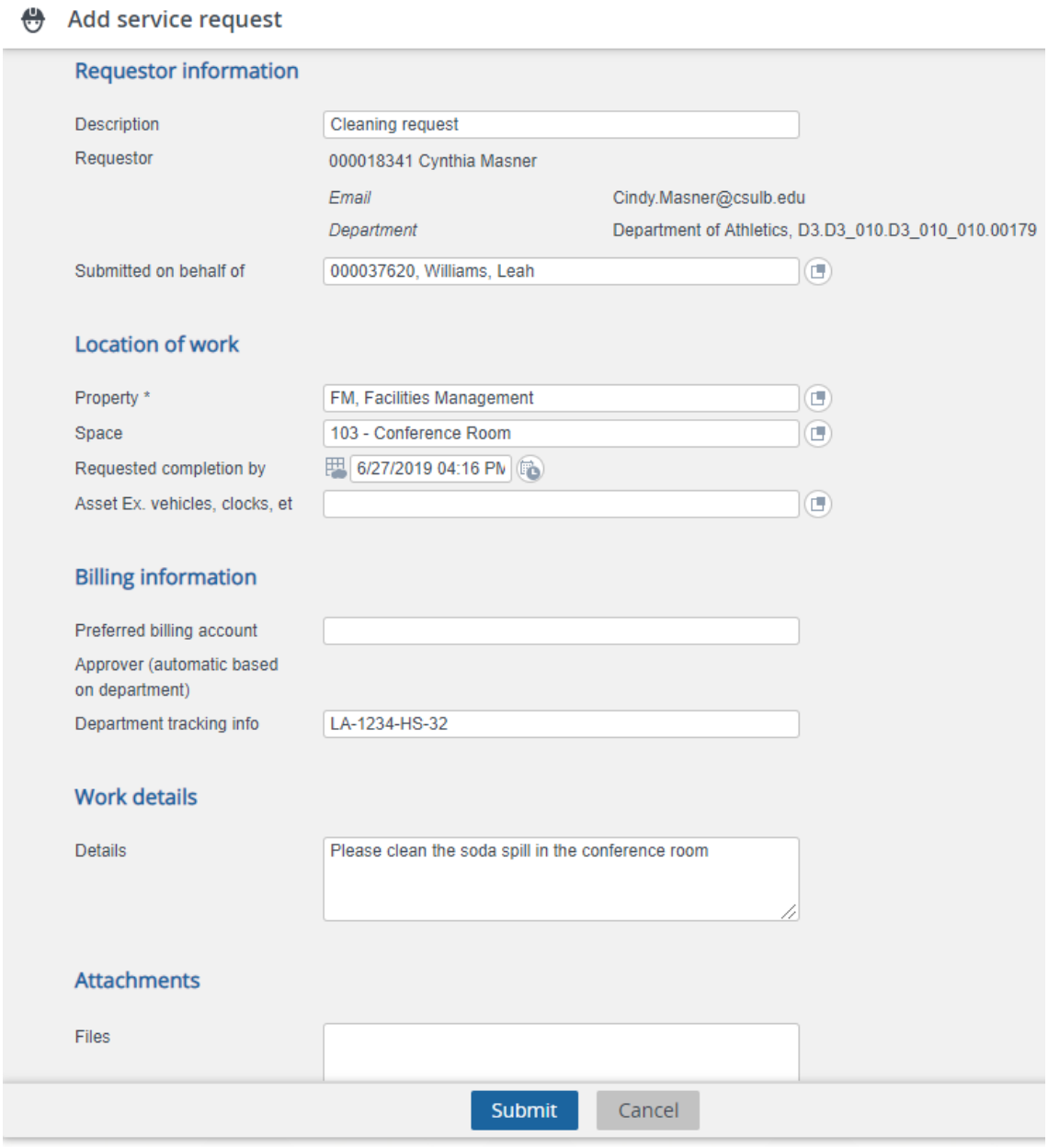


Figure 2: Submitting a Service Request form

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.

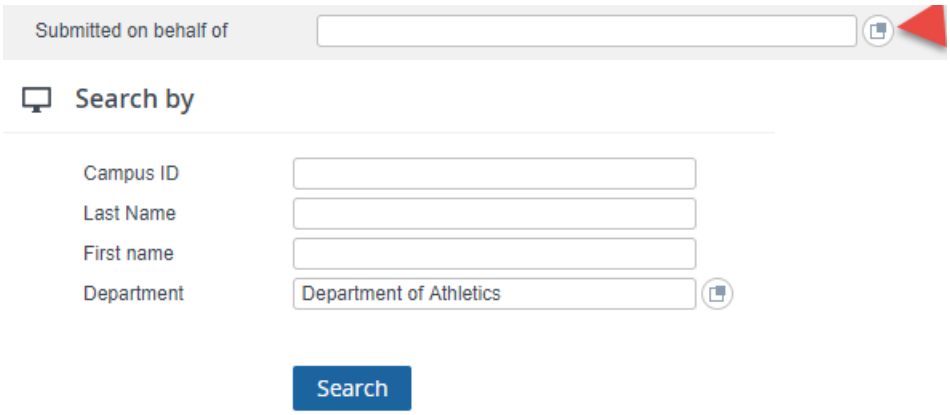


Figure 3: Submitting a Submitted on behalf of field and selecting a user by department

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.

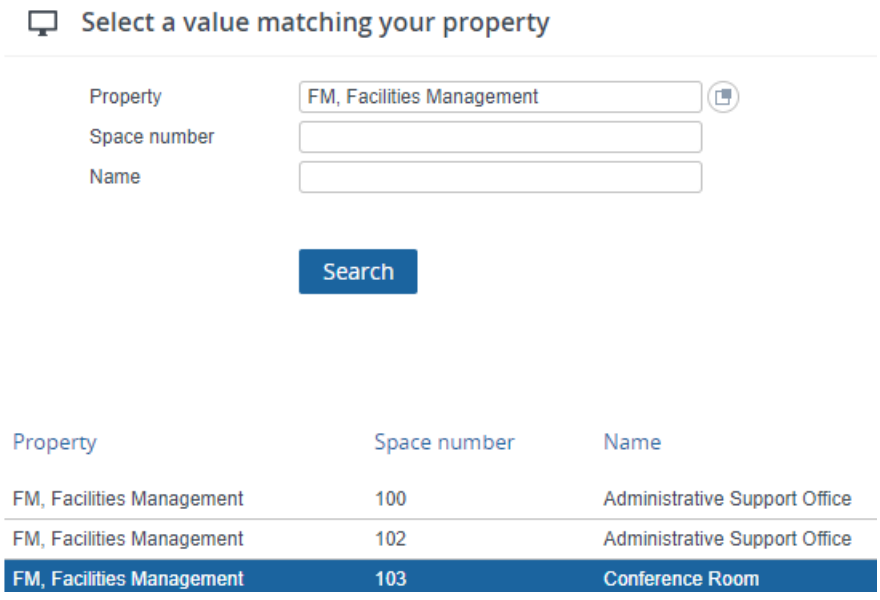


Figure 4: Searching and selecting a room based on a property

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.

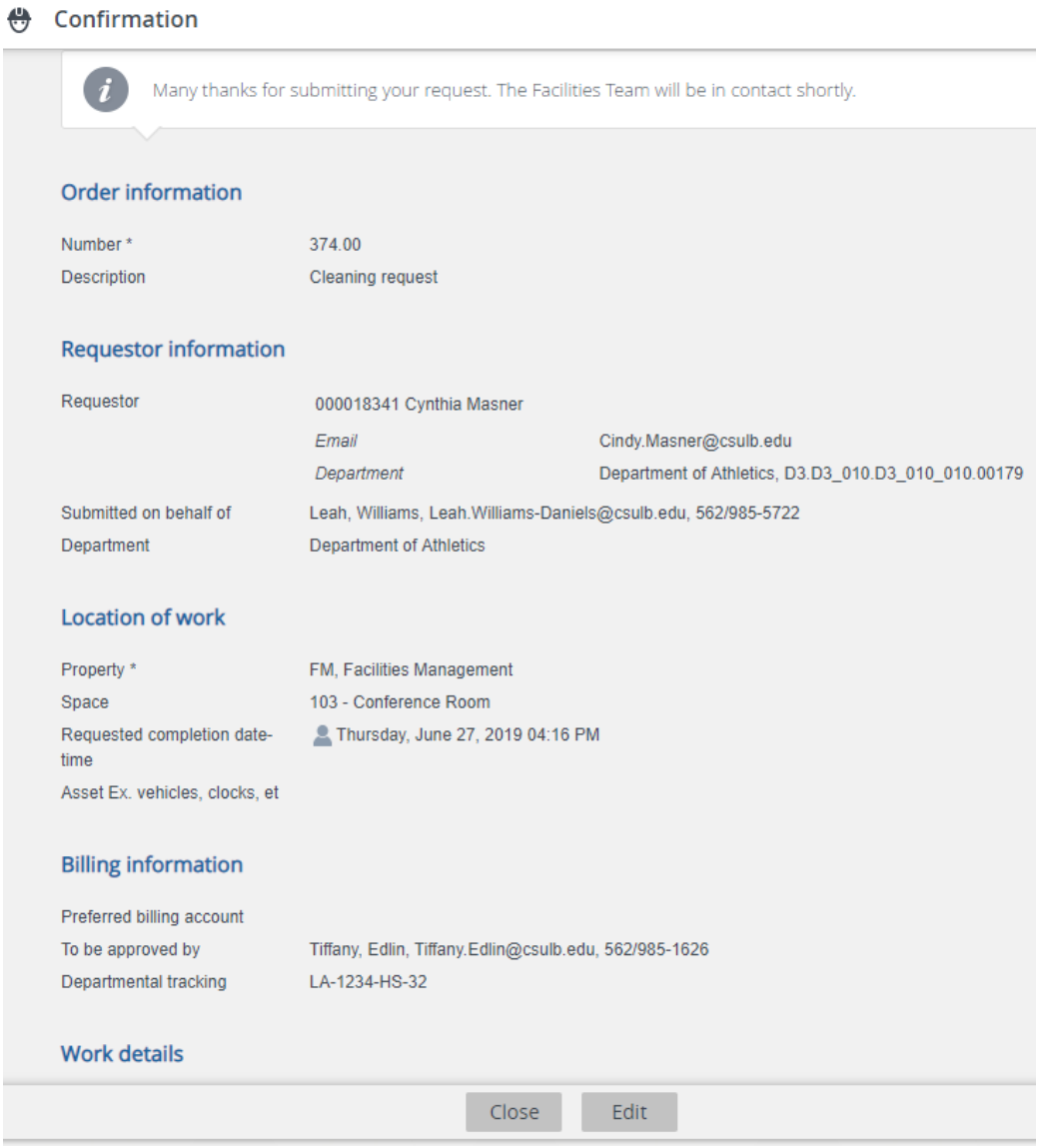


Figure 5: A sample of the confirmation page upon submitting a service request

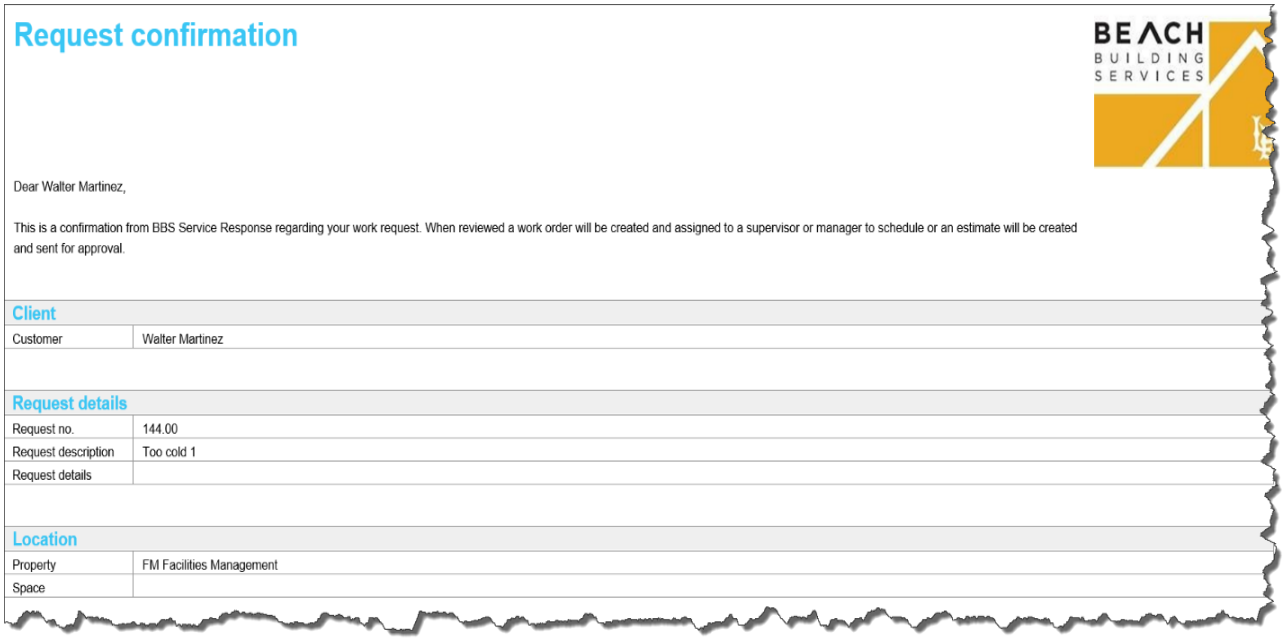
You have the option to edit your submittal by clicking the Edit button.

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

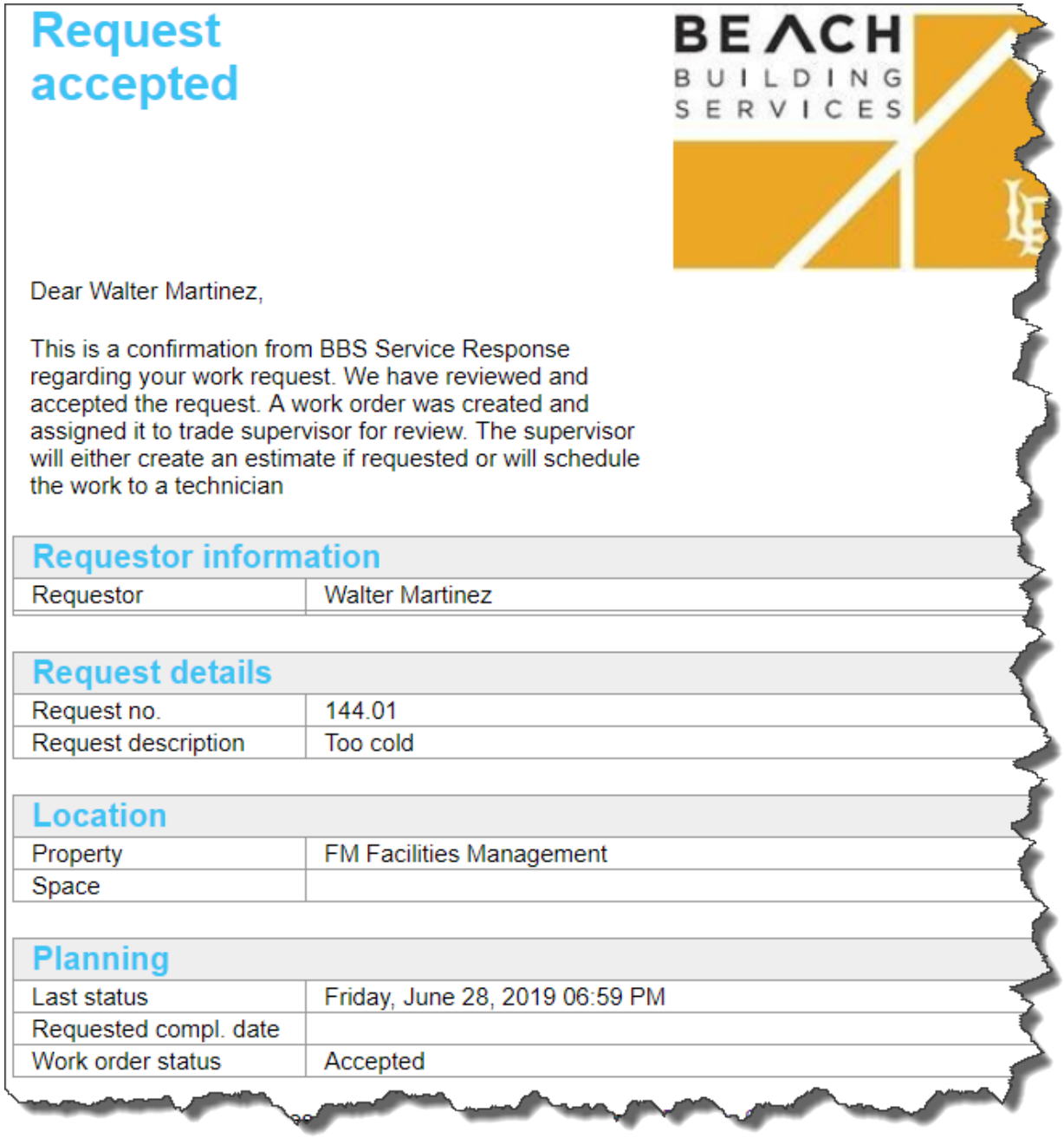
Dear Walter Martinez,

This is a confirmation from 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 and sent for approval.

Client	
Customer	Walter Martinez

Request details	
Request no.	144.00
Request description	Too cold 1
Request details	

Location	
Property	FM Facilities Management
Space	



Request accepted

BEACH BUILDING SERVICES

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

Requestor information

Requestor	Walter Martinez

Request details

Request no.	144.01
Request description	Too cold

Location

Property	FM Facilities Management
Space	

Planning

Last status	Friday, June 28, 2019 06:59 PM
Requested compl. date	
Work order status	Accepted

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 ppfm-is@csulb.edu.

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

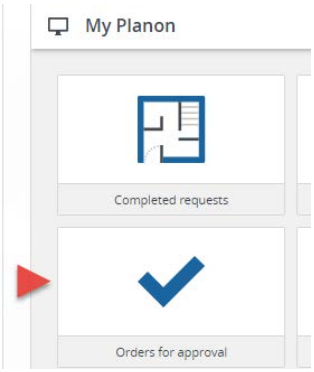


Figure 7: Selecting Orders for approval from My Planon

2. Select the order number you want to approve

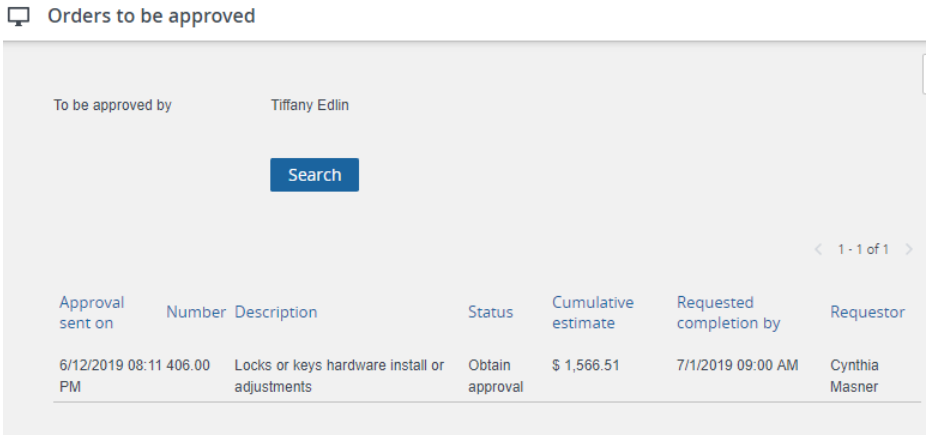


Figure 8: Selecting an order for approval from the list

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

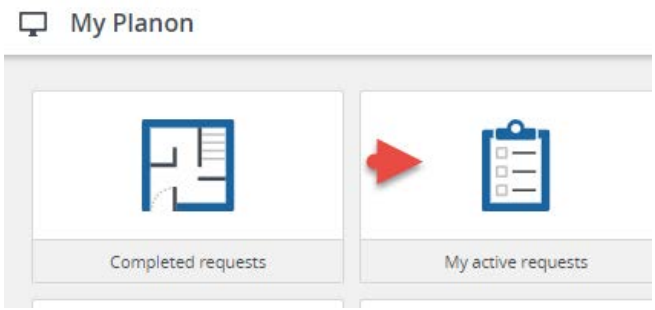


Figure 9: Selecting My Planon and viewing requests

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.

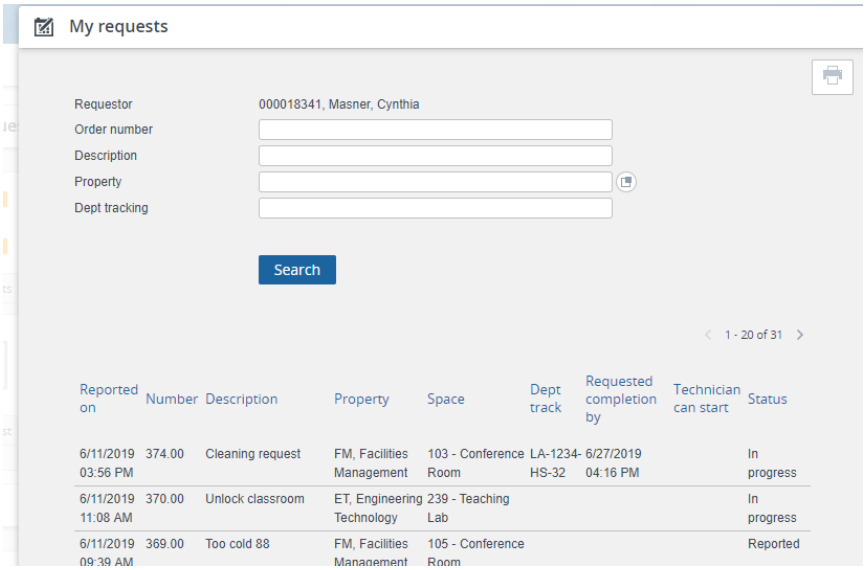


Figure 10: My Requests screen

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

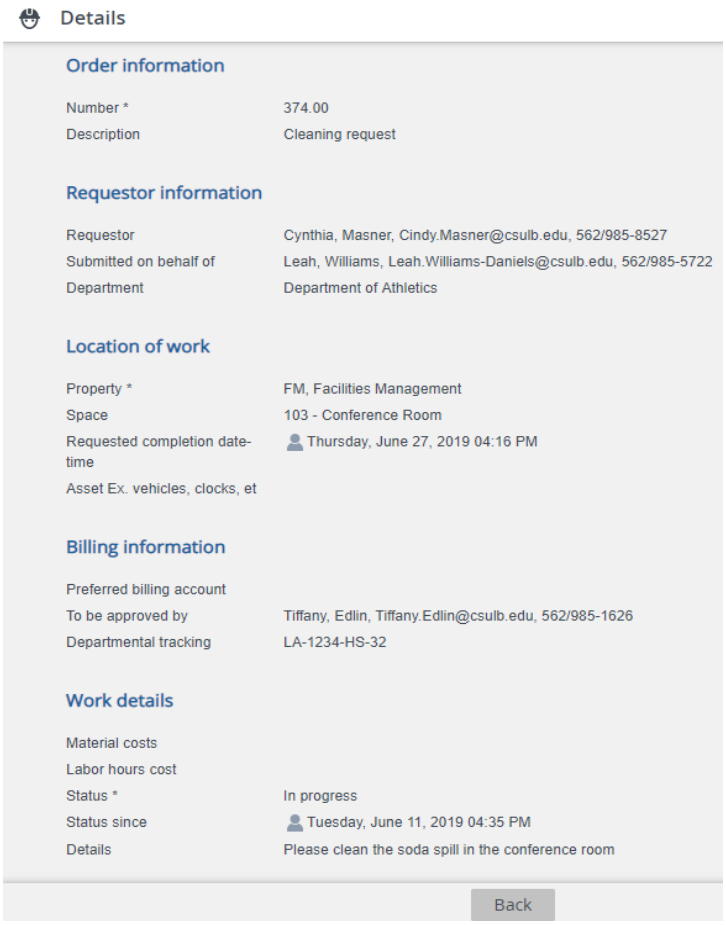


Figure 11: Details and status on the Request

Checking the status of your department orders

Procedure

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

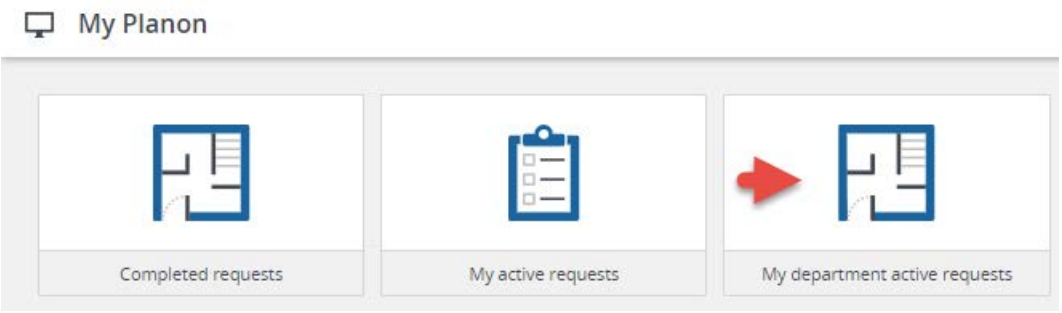


Figure 12: Select My Departments active requests to view the status on your department orders

2. The Requests list will open.

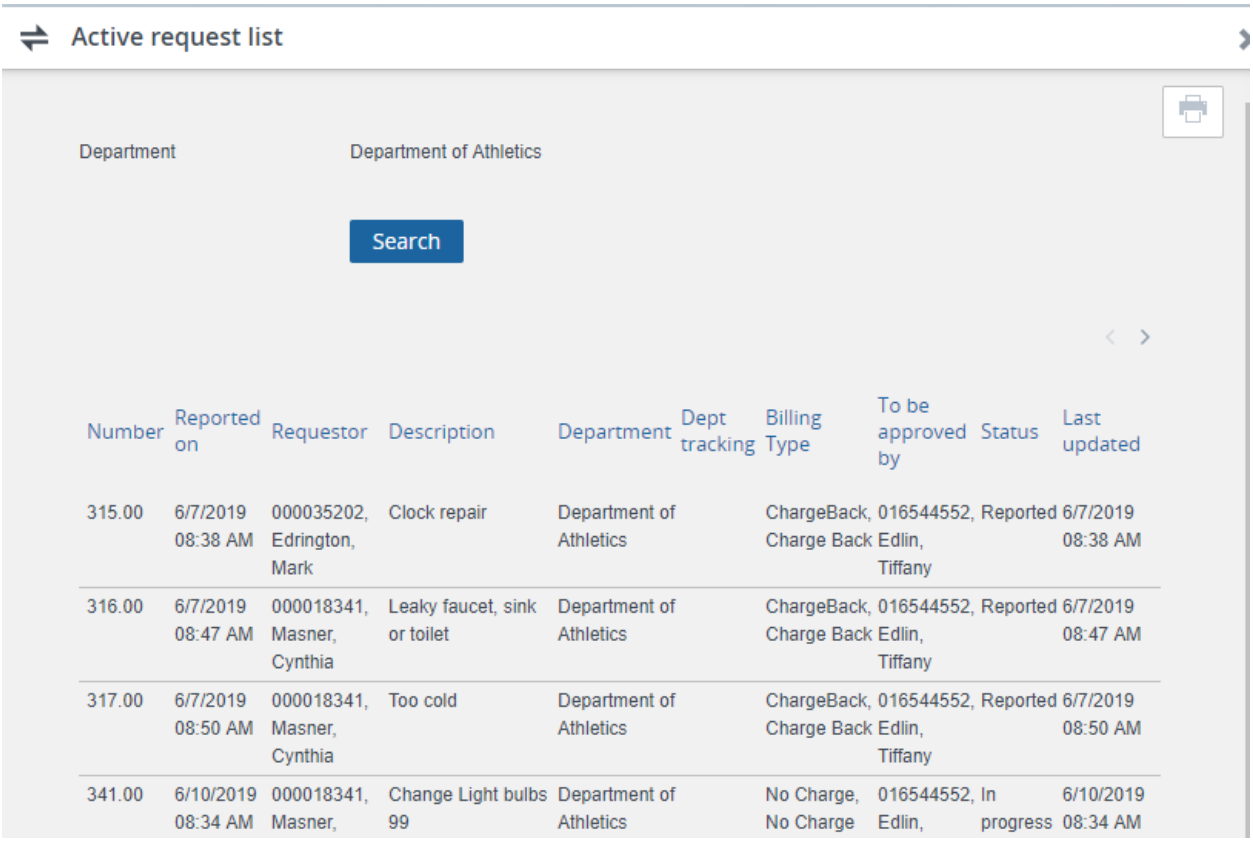


Figure 13: Viewing and selecting an Order to see more information

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.

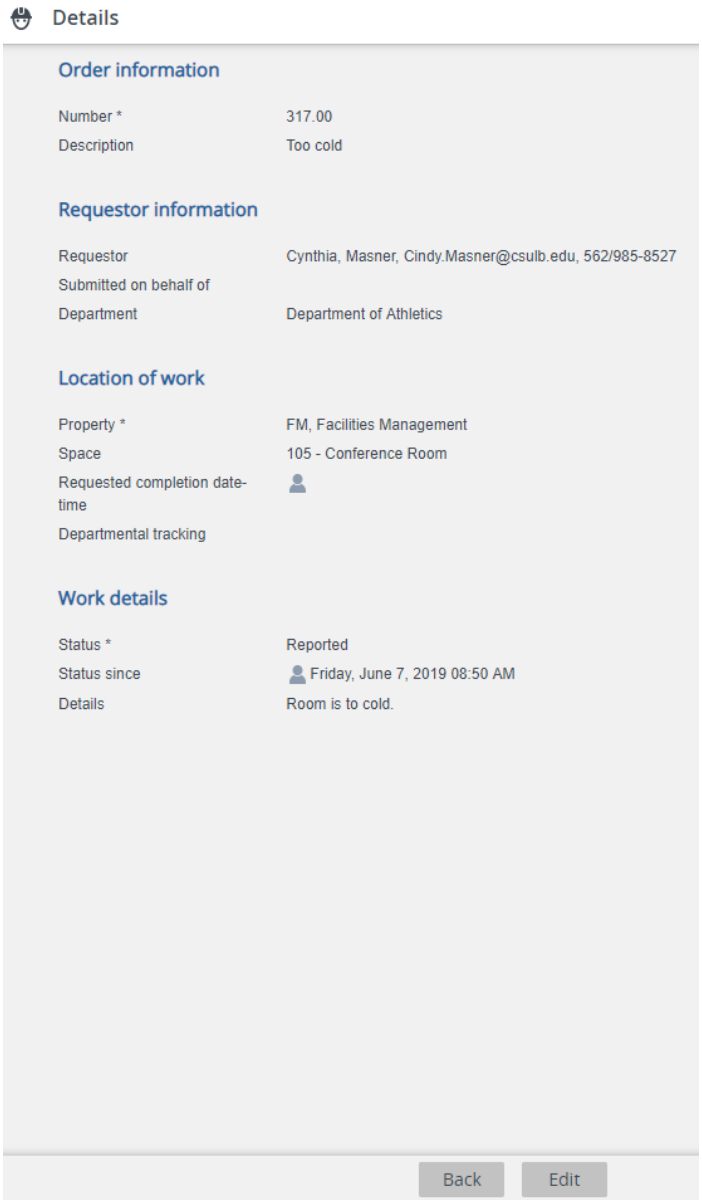


Figure 14: Details and status about the Order you selected. Orders in Status Reported can still be edited

Viewing building and space categories

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

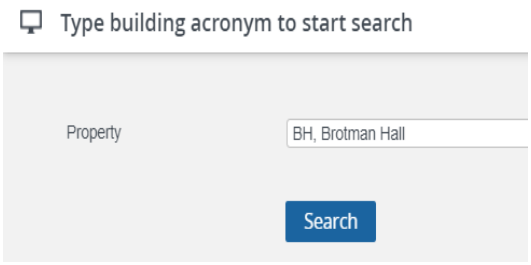


Figure 15: Type building acronym and select Search

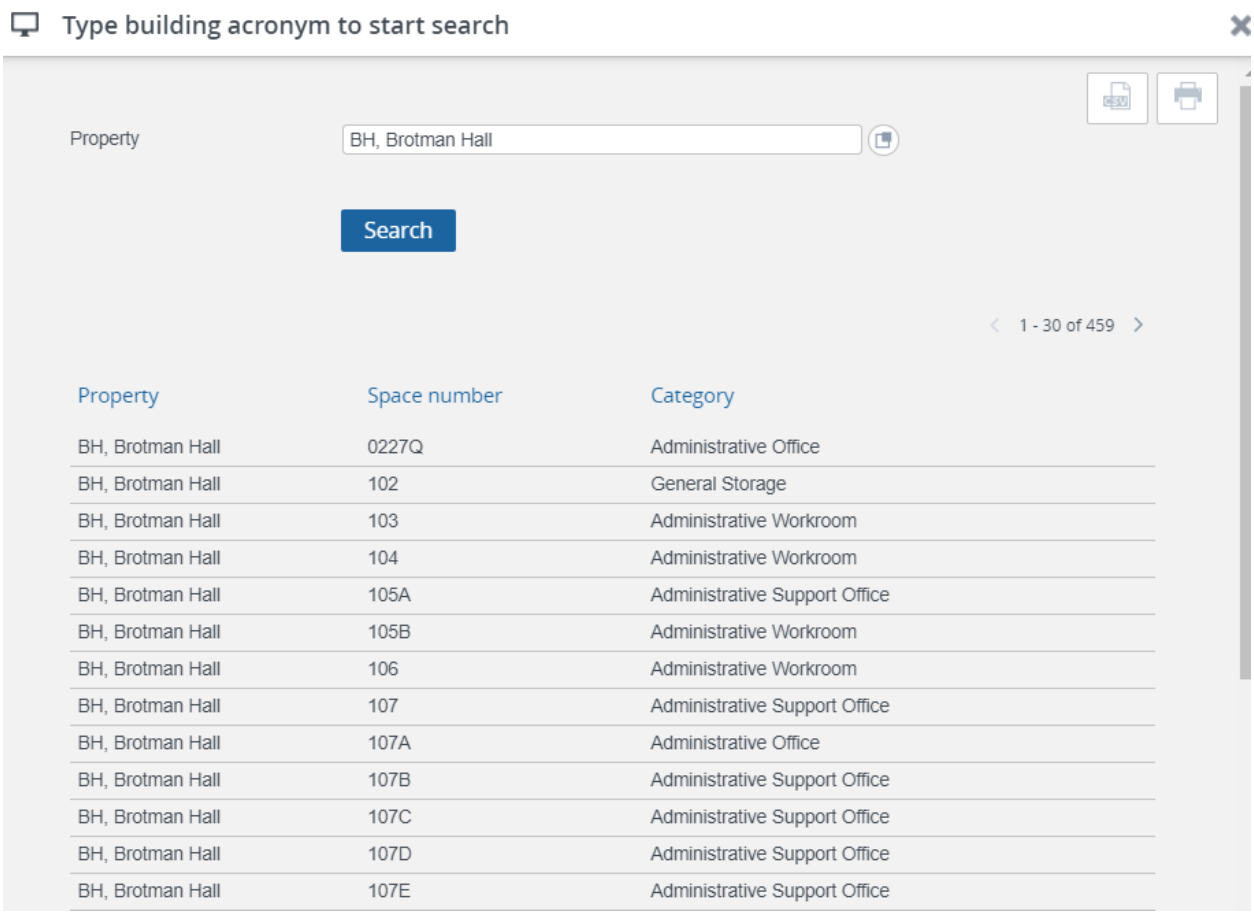


Figure 16: Here is a listing of building, room numbers and categories.

You can also print and save this as a PDF.