FACILITIES MANAGEMENT'S PLANON SYSTEM:

The general notification on Facilities Management's Planon System issued on 15 August 2018 via the info@StellenboschUni newsletter refers. More specifics on the impact of the system on a registered user are given below.

Maintenance Service Requests

Existing requests:

- All maintenance service requests that have been assigned to FM staff or are in progress, will remain on the current EAM system until completed.
- All maintenance service requests that have not been assigned to FM staff will be transferred to the Planon System by 3 September 2018.
- Currently service calls are logged via telephone and email to the FM Service Desk and a limited number of self-help users have access to capture requests via the EAM system. The current EAM self-help portal and user access will be disabled be end of August 2018. Only registered self-help users will be given access to Planon.

New requests from 3 September 2018:

- Registered users of Planon will be informed of their access and the link before end August 2018.
- Only registered Planon users will have access to the Planon "Self Help" function – refer screen shots below.
- All maintenance service requests logged via the "Self Help" function will generate a notification to the requesters once captured.
- Any person may still contact the FM Service Desk telephonically (ext. 4666) to log their requests, but registered users are urged to make use of the Planon "Self Help" function and call the FM Service Desk with emergency requests only.
- The FM Services Desk email, FMHelpdesk@sun.ac.za, will remain for logging calls by the campus community who are not registered users and therefore do not have access to the Planon system.

Non-maintenance work requests

Existing "KKW's":

- All KKW's currently in progress will remain active on the financial system (FBG115P), until closed after comletion.
- All KKW requests that are not in progress at end of August 2018, i.e. up to status 2 on FBG115P, will be cancelled transferred to the Planon system where it will then follow the required processes.
- FBG115P will be blocked to prevent users from capturing any new KKW's with effect from 03 September 2018. It will however still be possible to review history.
- The reference "KKW" (Small Capital Work) will cease to exist from 03 September 2018.

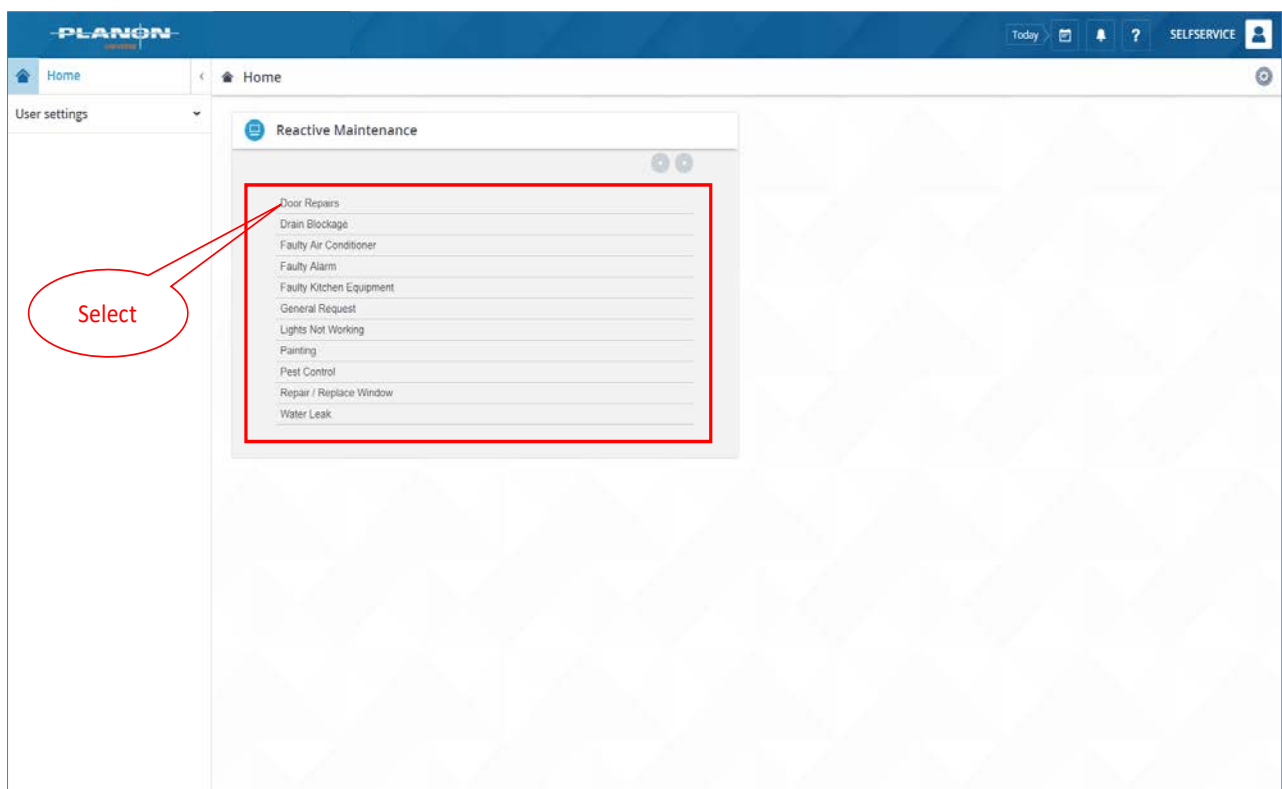Existing Project Applications / Requests (manual):

- These applications will be transferred to Planon depending upon the existing status of the project.
- Where these need to be converted to new requests via the Planon non-maintenance work request process, requesters will be notified of this should this be necessary for them to action.

New Work Requests from 3 September 2018:

- Registered users will be informed of their access and the link before end August 2018.
- Only registered Planon users will have access to the Planon "Self Help" function – refer screen shots below.
- All works requests (for example, previously referred to as Capital Projects or Residential or Refurbishment projects) will be logged by the registered users on Planon.
- Registered users will complete the "Work Request Form" and submit appropriate documentation for consideration by Facilities Management. The latter requests will automatically notify the authorising party in the department for approval of the request.
- Approved "Work Requests" will follow a review process by a Work Request Review Committee (WRRC) within FM for appropriate action.

Screen shots

Maintenance service requests

Non-Maintenance Work Requests

Frequently Asked Questions

1. **How do I become a registered user on Planon?**

   Registered users on Planon will receive confirmation of registration (current self-help users and "KKW" approvers). New users can request access by sending an email to FMHelpdesk@sun.ac.za.

2. **How do I follow up on outstanding maintenance service requests?**
   All requests logged by the user will be reflected in Planon with a status indicated. Depending on the status, the applicable team lead, technician or service desk can be contacted.

3. **How will I approve spending from my cost centre on the system?**

   For maintenance requests, notification of cost estimate is systematically sent to the cost centre owner via email for approval.

   For non-maintenance work requests, there is no integration with the financial system yet. Notification of the request is systematically sent to the approver via email for approval.

4. **What is the difference between a maintenance service request and non-maintenance work request?**

A maintenance service request is for reactive maintenance and also includes requests for minor items which require replacement, refurbishment or installation.

A non-maintenance work request is for major replacements and new or refurbished items or infrastructure.

5. **Will project application forms still be used?**

The previous project application (FPOK/BOB) forms have been replaced with the Work Request Form A-B, which will be available on the Planon system under non-maintenance service requests.

6. **Why are supporting documents required with non-maintenance work requests?**

These documents will assist in the determination of project timing, capacity, alignment with institutional/academic/commercial strategy and priorities, etc.

7. **Who can I contact for an update on the status of my non-maintenance work request?**

For new work requests you may direct your queries via email to wrrc@sun.ac.za.

If the work request has been reviewed and registered as a project, you will be contacted by the assigned Project Manager and all future communication can be directed to this Project Manager.

Queries:

Requestors and users of Planon can contact one of the numbers below depending on the nature of their query:

- General works' queries and assistance with logging of requests: FM Service Desk on Ext 4666
- Planon login, user access and general system enquiries: Planon team on Ext 4655