

Room data maintenance

Guide for Room Stewards

May 2019

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Room Steward Roles & Responsibilities

- Each department will have one key room steward and may have one or more backups.
- Room Data Room Stewards are expected to:
 - 1) Maintain room details in Planon for rooms “owned” by their department:
 - a) Initially check and update the data so it is correct
 - b) Update as changes occur
 - c) Review once a year
- The data to be maintained for each room includes:
 - Facilities and equipment
 - Capacity
 - Layout
 - Seating type
 - Photo
 - Known as name
 - Notes
 - Whether the room is :
 - Requestable
 - Catering Friendly
 - Exam friendly
 - Quiet room
 - Student bookable
 - Room access type
 - Directions
 - Accessibility link
 - Room contact
 - Room contact email
 - Room contact number
 - AV contact
 - AV contact email
 - Room steward
 - Room steward email

High level steps:

1. Navigate to the correct screen in Planon
2. Filter the list of rooms (to display only your own rooms or a subset of them)
3. Make changes to room data

Navigate to the correct screen in Planon

1. Login at planon.imperial.ac.uk
2. From left hand menu, click Room Booking then Room bookings
3. Select Graphical Planner in the top row
4. Select Data view tab

Filter the list of rooms

1. Use one of your existing filters or add a new one

Make changes to the room data

1. Select a single room, or a collection of rooms (using Shift or Control), or all rooms in the filtered list
2. Make changes and save

Navigation to the correct screen in Planon

Room Stewards have been granted access to the 'back office' functions in Planon.

To access this area, log into Planon in a browser, planon.imperial.ac.uk, and navigate to the menu on the left-hand side.

Click on "Room Booking" and then "Room bookings".

The screenshot displays the Planon back office interface. The top navigation bar is blue with the 'PLANON' logo and 'UNIVERSITY' text. Below the bar, there are two 'Home' buttons. The left-hand side menu is expanded, showing 'General Management', 'Room Booking', and 'Room bookings'. The 'Room Booking' and 'Room bookings' items are circled in yellow. The main content area is titled 'Room bookings' and contains an information message: 'This service is currently being rolled out as part of the [Room Booking Implementation project](#). You will be informed when it is available for your department. Contact rbproject@imperial.ac.uk for more information.' At the bottom of the main area, there are two buttons: 'Book a room' and 'My bookings'.

1)

Properties SHERFIELD > Floors & spaces > **Graphical planner** > Reservations > Reservation details > Reservation subdetails

Space units Asset units Flexible workspaces Projects

No filter

Code Contains

Code	Name	Capacity
Space units (6)		
402	Level 0	
SHER-04-402	SHER-04-402 (13), shared	13
SHER-04-409	SHER-04-409 (4), shared	4
SHER-04-411	SHER-04-411 (6), restricted, mod...	6
SHER-04-436	SHER-04-436 (4), restricted	4
SHER-04-437	SHER-04-437 (4), restricted	4

General Additional fields

Space unit data

Room type	Meeting room
Code	SHER-04-409
Campus	SK, SOUTH KENSINGTON
Building	SHER, SHERFIELD
Name	SHER-04-409 (4), shared
Space	409, Conference/Meeting
Room facilities	Yes
Calendar	MR - Bookable, Meeting Room calendar -
Num. of advance r...	365
Max. num. of reser...	1

Data view Graphical planner

Space units

- Add
- Copy
- Delete
- Transfer to archive
- Retrieve from archive

Links

- Link reservation units

Report

- Report

Graphical Planner tab shows a list of rooms. There are two display tabs:

- Data view
- Graphical planner

1) **Data view tab** shows detailed room information and is used to maintain room data.

2) **Graphical planner tab** shows room bookings.

2)

Properties SOUTH KENSINGTON > Floors & spaces SHER-04 > **Graphical planner** > Reservations > Reservation details > Reservation subdetails

Space units Asset units Flexible workspaces Projects

31/05/2018

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

Code	Name	Capacity	Default Layo...
SHER-04-437	SHER-04-43...	4	
SHER-04-436	SHER-04-43...	4	
SHER-04-409	SHER-04-40...	4	
SHER-04-402	SHER-04-40...	13	

Graphical planner

Room Stewards have the ability to amend or cancel bookings in the back office of Planon. When displaying the Graphical Planner view, **do not click on the bookings.**



Room Stewards have the ability to amend or cancel bookings in the back office of Planon. When displaying the Graphical Planner view, **do not click on the bookings.**

Properties > Floors & spaces > Graphical planner > Reservations > Reservation details

Reservation subdetails

Space units | Asset units | Flexible workspaces | Projects

No filter

Code Contal

Code - | Name

Space units (640)

ACEX-01-101	ACEX 10
ACEX-01-102	ACEX 10
ACEX-01-102A	ACEX 10
ACEX-01-103A	ACEX 10
ACEX-01-103B	ACEX 10
ACEX-01-151	ACEX 15

Count All None

« 1 2 3 4 5 6 7 8 9 10 »»

Select a single record from the list of Space units

You can show or hide the room details by clicking the small arrow to the left of the display.

Properties > Floors & spaces > Graphical planner > Reservations > Reservation details

Reservation subdetails

Space units | Asset units | Flexible workspaces | Projects

No filter

Code Contains

Code - | Name | Capacity | ...

Space units (640)

Code	Name	Capacity	
ACEX-01-101	ACEX 101 - Pilot Plant	15	
ACEX-01-102	ACEX 102 - UG Teaching Laborat...	50	
ACEX-01-102A	ACEX 102A - Synth Teaching Lab...	20	
ACEX-01-103A	ACEX 103A - Teaching Space 1	20	
ACEX-01-103B	ACEX 103B - Teaching Space 2	20	
ACEX-01-151	ACEX 151 - Student Workshop - ...	20	
ACEX-01-160	ACEX 160 - Supersonic Wind Tun...	6	
ΔCFX 01MM151R	ΔCFX M151R - Mezzanine Prie...	35	

Count All None

« 1 2 3 4 5 6 7 8 9 10 »»

Report

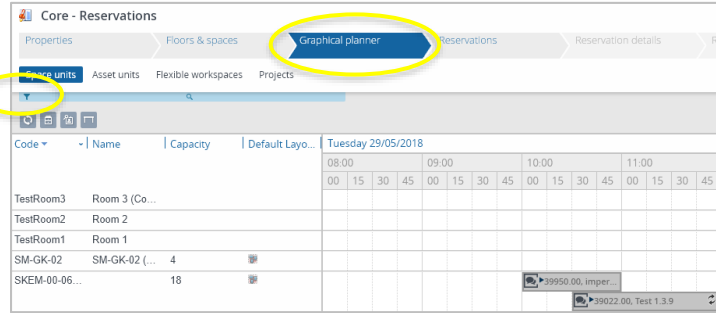
Report

Setting up filters

Setting up a filter – Department (1/2)

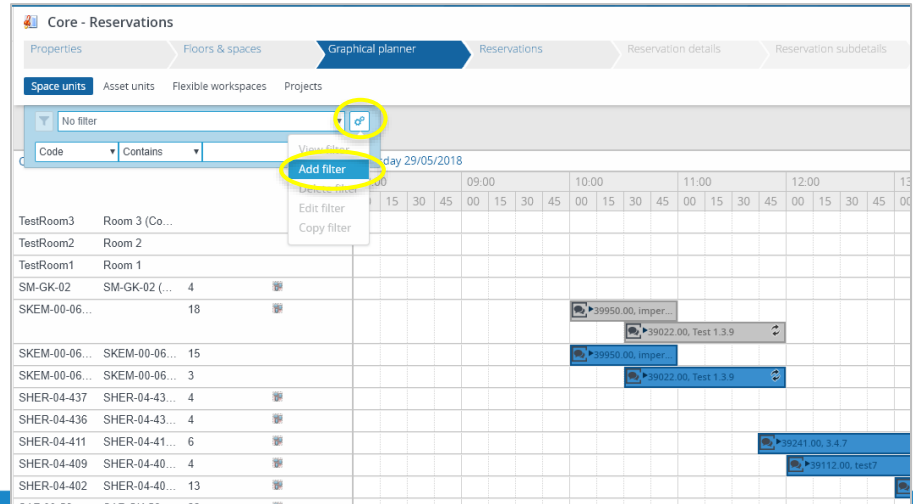
Filters can be created so that you only see the rooms you are responsible for.

1)



1) To set up a filter for your department, navigate to the “Graphical Planner”. Click the filter button.

2)



2) Click on the cogs button and then “Add filter”

Setting up a filter – Department (2/2)

Select filter criteria

Filter name: ICT rooms

Group AND Group OR Ungroup

AND Department

OK Cancel

Department

Code Contains

Show archived items

Departments (4)

- 0001
- 0005, Information and Communication Technologies
- 0007, Mechanical Engineer

OK Cancel

Select filter criteria

Filter name: ICT Rooms

Group AND Group OR Ungroup

AND Department = 0005, Information and Communication Techn

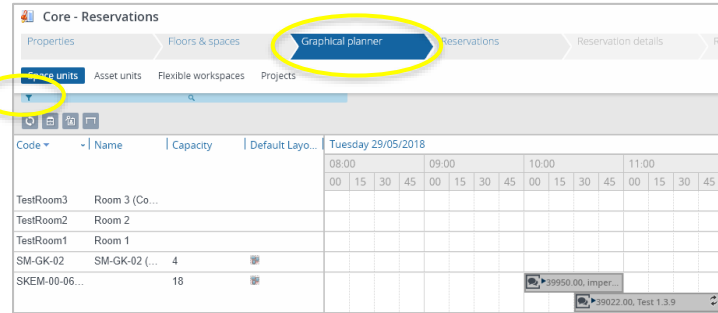
OK Cancel

3) Give your filter a memorable name. In the drop-down menu, select “Department”. Click the pop-up button at the end of the row to bring up the options.

4) Select your department then click “OK”.

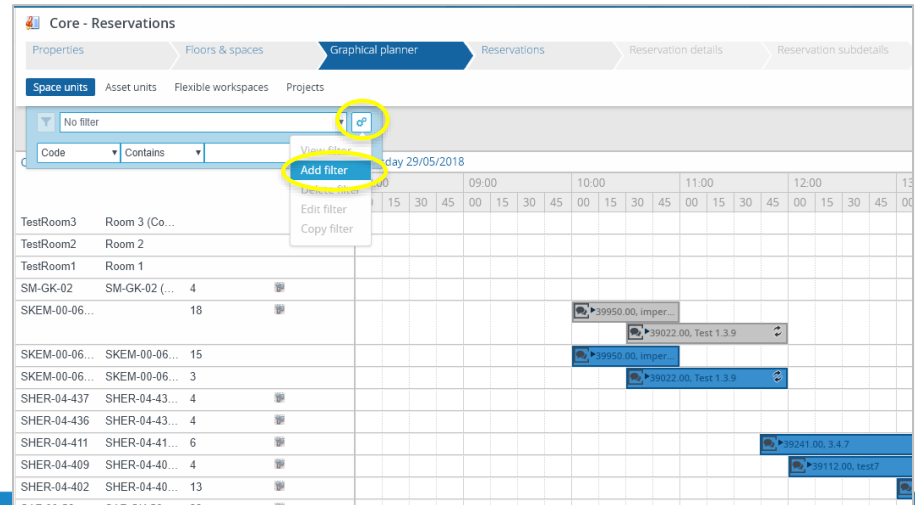
5) Click “OK”. You will now only see a list of the rooms in your department. This filter is now saved and can be turned on or off.

1)



- 1) To set up a filter for a room, navigate to the “Graphical Planner”. Click the filter button.

2)



- 2) Click on the cogs button and then “Add filter”

Select filter criteria

Filter name: room 505

Group AND Group OR Ungroup

AND Code Contains CAGB-05-505

OK Cancel

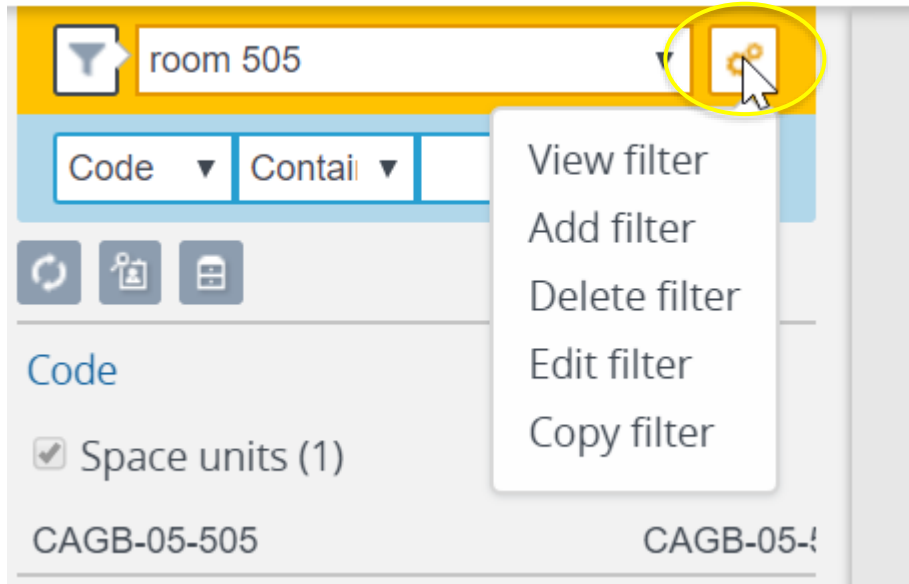
3) Give your filter a memorable name. In the drop-down menu, select “Code”. In the value field type the start of the room name. Then click “OK”.

room 505

Code Contains

Code	Name	Capacity	...
CAGB-05-505	CAGB-05-505 (12), restricted, mo...	12	

5) You will now only see this room. This filter is now saved and can be turned on or off.



To edit or delete a filter, select the filter, then click on the cogs to display the menu.

With no filter selection, only the Add filter option is available. With a filter selected, all options are available.

Setting up a filter – multiple criteria

The screenshot shows a dialog box titled "Select filter criteria". At the top, there is a "Filter name:" field containing the text "room 505". Below this, there are three tabs: "Group AND", "Group OR", and "Ungroup". The "Group AND" tab is selected. A single row of criteria is visible, starting with an "AND" radio button, followed by a dropdown menu set to "Code", another dropdown menu set to "Contains", and a text input field containing "CAGB-05-505". A yellow circle highlights a "+" button at the end of this row. At the bottom of the dialog, there are three buttons: "Preview changes", "OK", and "Cancel".

You can add multiple criteria to your filter. In this example, a filter has been created in order to view a bespoke selection of rooms.

1) While adding a new filter or editing an existing filter, click the “+” at the end of the row, which will add a new set of criteria below.

The screenshot shows the same "Select filter criteria" dialog box, but now with two rows of criteria. The "Filter name:" field now contains "room 505 and 575". The "Group OR" tab is selected. The first row is identical to the first screenshot, with a yellow circle around the "OR" radio button. The second row starts with an "OR" radio button, followed by a dropdown menu set to "Code", another dropdown menu set to "Contains", and a text input field containing "CAGB-05-575". A yellow oval highlights the "OR" radio button and the entire second row. At the bottom, there are three buttons: "Preview changes", "OK", and "Cancel".

2) In the new row, enter your additional criteria. Select AND or OR depending on whether a single room needs to meet both criteria (AND) or just one (OR) to be included in the list.

In this case, a second room has been added to the filter.

Updating Room Data

The screenshot shows a navigation menu with 'Graphical planner' selected. Below it, a search bar contains 'hxly 02'. A table lists room details with columns for Code, Name, and Capacity. The row for 'HXLY-02-202' is highlighted.

Code	Name	Capacity	
Space units (10)			
HXLY-02-202	HXLY 202	18	
HXLY-02-206	HXLY 206	80	
HXLY-02-210	HXLY 210	40	
HXLY-02-213	HXLY 213 - Clore Lecture Theatre	255	

To view the data held against a room, navigate to the “Graphical planner”. Apply one of your saved filters. Planon will remember if you had a filter applied last time you used it and this will already be applied when you navigate to the “Graphical Planner”. The filter bar will be yellow if a filter is applied, and blue if no filter is applied. Select a room by clicking on it. In this case, HXLY-02-202 has been selected.

Select the “Data view” tab, all the data held against an individual room can be found in the “General” and “Additional fields” tabs.

In Appendix 1 (page 40) of this guide, a full list of the data fields which should or should not be amended by Room Stewards, can be found.

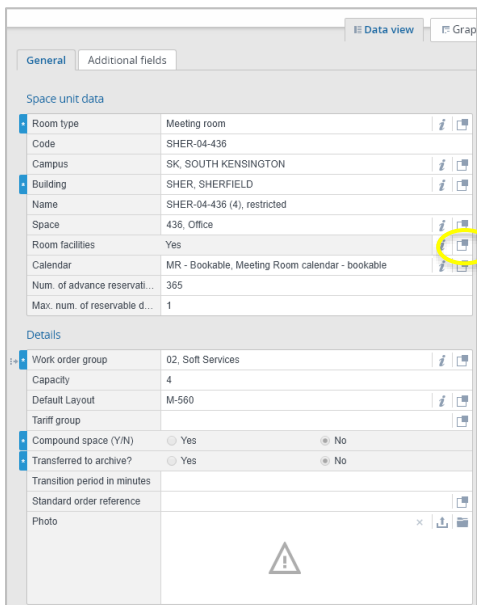
If data needs to be changed in a field which Room Stewards should not update, contact the Planon System Administrators in the [Estates Operations Customer Service Centre](#).

The screenshot displays the Planon software interface. The top navigation bar includes: Properties, Floors & spaces, Graphical planner (selected), Reservations, Reservation details, and Reservation subdetails. Below this, there are tabs for Space units, Asset units, Flexible workspaces, and Projects. A search bar shows 'No filter' and a dropdown menu set to 'Code' with a 'Contains' filter. A table lists space units, with 'SHER-04-436' highlighted in blue. To the right, a detailed view for 'SHER-04-436' is shown, with 'General' and 'Additional fields' tabs highlighted in yellow. The 'General' tab contains the following data:

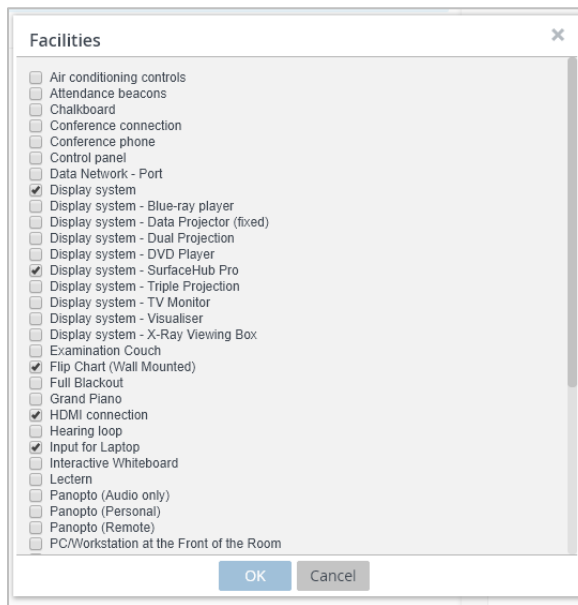
Space unit data	
Room type	Meeting room
Code	SHER-04-436
Campus	SK, SOUTH KENSINGTON
Building	SHER, SHERFIELD
Name	SHER-04-436 (4), restricted
Space	436, Office
Room facilities	Yes
Calendar	MIR - Bookable, Meeting Room calendar - bookable
Num. of advance reservati...	365
Max. num. of reservable d...	1

The 'Details' section includes:

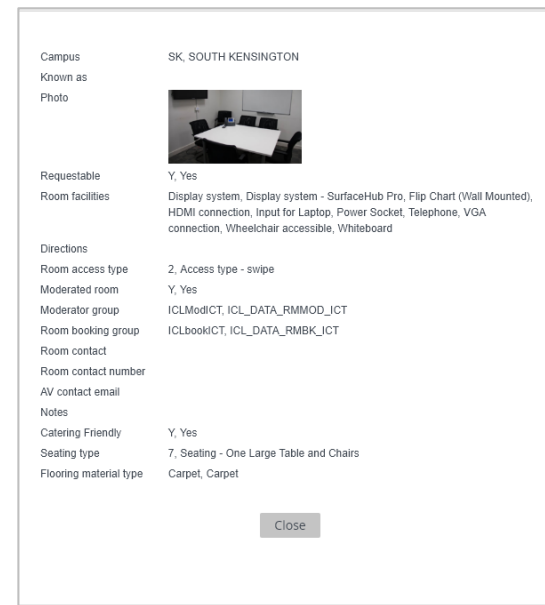
- Work order group: 02, Soft Services
- Capacity: 4
- Default Layout: M-560
- Tariff group: [empty]
- Compound space (Y/N): Yes No
- Transferred to archive?: Yes No
- Transition period in minutes: [empty]
- Standard order reference: [empty]
- Photo: [empty]



1) To change data, navigate to the field you would like to change, and click the pop-up button.



2) In this example, the “Room facilities” need to be updated. In the pop-up window, select or deselect the facilities as required.



3) This information will be reflected in the “More info” section of the ICLIS gadget, for general users.

Appendix

Space unit data (General)	Should Room Steward edit?*
Room type	No
Code	No
Campus	No
Building	No
Name	No
Space	No
Room facilities	Yes
Calendar	No
Num. of advance reservation days	No
Max. num. of reservable days	No

Details (General)	Should Room Steward edit?
Work order group	No
Capacity	Yes
Default Layout	Yes
Tariff group	No
Compound space (Y/N)	No
Transferred to archive?	No
Transition period in minutes	No
Standard order reference	No
Photo	Yes

*If data needs to be changed in a field which Room Stewards should not update, contact the Planon System Administrators in the [Estates Operations Customer Service Centre](#).

Room features (Additional fields)	Should Room Steward edit?
Requestable	Yes
Moderated room	No
Catering Friendly	Yes
Exam friendly	Yes
Seating type	Yes
Quiet room	Yes
Student bookable	Yes
Flooring material type	Yes
Area sqm	No

Access (Additional fields)	Should Room Steward edit?
Room access type	Yes
Directions	Yes
Accessibility link	Yes

Contacts (Additional fields)	Should Room Steward edit?	Room data (Additional fields)	Should Room Steward edit?	Celcat export data (Additional fields)	Should Room Steward edit?
Room contact	Yes	Department	No	KX ID	No
Room contact email	Yes	Start Date	No	Year availability	No
Room contact number	Yes	End date	No	Celcat ID	No
AV contact	Yes	Known as	Yes	Demand category	No
AV contact email	Yes	Calendar	No		
Moderator team email	No	Owning system	No		
Moderator group	No	Last Updated By	No		
Room booking group	No	Late update Date	No		
Super user	Yes	Notes	Yes		
Super user email	Yes	Notes (private)	Yes		