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Planon reporting

Guide for Room Stewards

July 2019

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Room Stewards have access to run reports in Planon, including:

- A report listing all the reservations in one room, or a group of rooms, on a given day;

- A report on the hours occupied in a room, or group of rooms, across a day, week, or month;

- A summary of moderated room bookings, showing the number of requests accepted or rejected;

- A report showing all the moderated booking rejection reasons.

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Reporting – reservations in one day

This report can be used to view all the bookings in a department's rooms for an upcoming day.

1) To create this report, navigate to the "Graphical planner" and set up a filter for the group of rooms to be reported on (see the Room Data guide for room stewards for details of how to setup filters).

2) Next navigate to the "Reservations" screen. Create a new filter on the "Start date & time" and select the relevant date. Click OK.

3) Click the "Report" button from the right-hand menu.

Reporting – reservations in one day

5) On the right hand side are the options for viewing and saving the report.
   a) Select 'Preview & print' to generate a PDF of the report, which can be printed or downloaded.
   b) Select 'Save as' to save a copy in Excel (XLS/XLSX format), which you can then edit further if wished.

4) In the Reporting window, select "**Reservations – day list**"

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This report can be used to view the total hours a room(s) in booked per month across the year.

1) To create this report, navigate to the "Graphical planner" and set up a filter for the group of rooms to be reported on (see Room Data guide for room stewards).

2) Click the "Report" button from the right-hand menu.

3) In the Reporting window, select "**Reservations – Occupation per unit per month in hours**"

4) Print your report or save as an excel file to edit further.

3)

4)
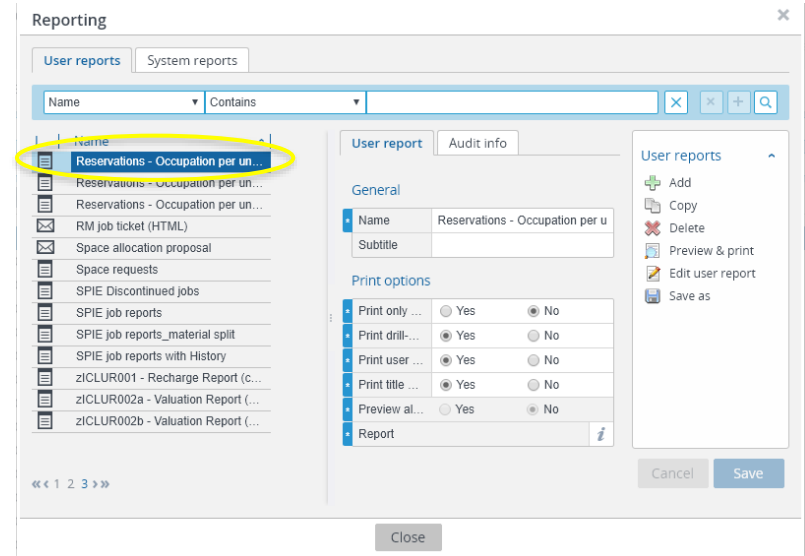
Building - Room	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
CITY AND GUILDS, CAGB-07-707 - CAGB-07-707 (6), restricted	0	0	0	0	1	0	0	0	0	0	0	0	1
CITY AND GUILDS, CAGB-07-765 - CAGB-07-765 (18), restricted, moderated	0	0	0	0	15	6	7	0	0	0	0	0	28
	0	0	0	0	16	6	7	0	0	0	0	0	29

Reservations - Occupation per unit per month in hours

Reporting – Moderated rooms summary

This report can be used to view whether room booking requests have been "Confirmed", "Declined" or are still "Awaiting approval", and the time taken to respond.

1) To create this report, navigate to the "Graphical planner" and set up a filter for the group of rooms to be reported on (see page 19 for how to set up a filter for moderated rooms).

2) Next navigate to the "Reservations" screen. Create a new filter on:
   a) "Start date & time" - select the dates to be covered in the report. In this example the month of May 2018 has been selected

3) Click the "Report" button in the right-hand menu. In the Reporting window, select "**ICL052 – Summary of moderated room reservations**"

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Exporting your report:
1) The report will generate a list of every booking in each room over your selected time period and whether it was "Confirmed", "Declined" or still "Awaiting approval".

2) To view a summary of the total number of confirmations, declinations or requests awaiting approval, it is recommended that the report is downloaded to Excel. To do this click "Save as" and change the file type to "XLSX: Data only".

3) In Excel, create a pivot table to view a summary for the month.

1)

|		Summary of moderated room reservations				
Number	Reservation unit.	Moderator	Confirmed	Declined	Awaiting approval	Average time to approve (days)
39363.00	CAGB-07-765 (18), restricted, moderated		1	0	0	0
39505.00	CAGB-07-765 (18), restricted, moderated		1	0	0	0
39657.00	CAGB-07-765 (18), restricted, moderated		0	0	1	0
39662.00	CAGB-07-765 (18), restricted, moderated		0	0	1	0
39670.00	CAGB-07-765 (18), restricted, moderated		0	0	1	0
39673.00	CAGB-07-765 (18), restricted, moderated		0	0	1	0
39674.00	CAGB-07-765 (18), restricted, moderated		0	0	1	0

2)
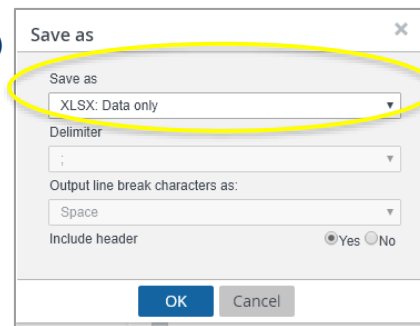
Row Labels	Sum of Confirmed	Sum of Declined	Sum of Awaiting approval
☐ CAGB-07-765 (18), restricted, moderated	3	0	13
(blank)	3	0	13
☐ DW_Test_Name	0	0	3
(blank)	0	0	3
☐ SHER-04-411 (6), restricted, moderated	53	6	12
ICL_DATA_RMMOD_ICT	53	6	12
Grand Total	56	6	28

3)

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This report can be used to view the rejection reasons provided when the use of a moderated room is declined.

1) To create this report, navigate to the "Graphical planner" and set up a filter for the group of rooms to be reported on (see page 15 for how to set up a filter for moderated rooms).

2) Next navigate to the "Reservations" screen. Create a new filter on:
   a) "Start date & time" - select the dates to be covered in the report
   b) "Status" – select "RS70, Declined"

3) In the Reporting window, select "**ICL051 – Rejected reservations with reasons**"

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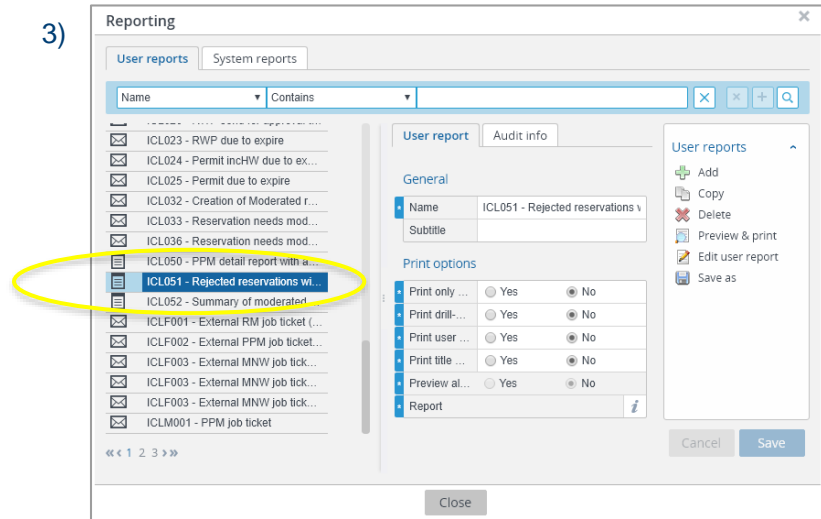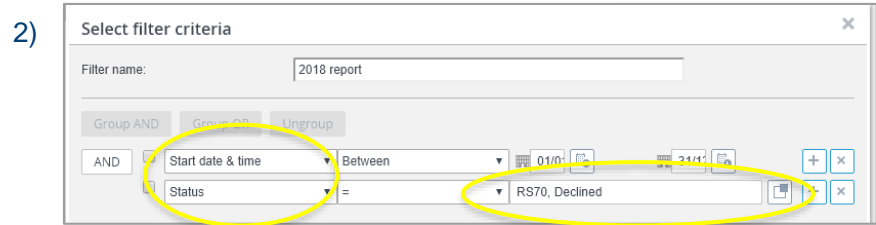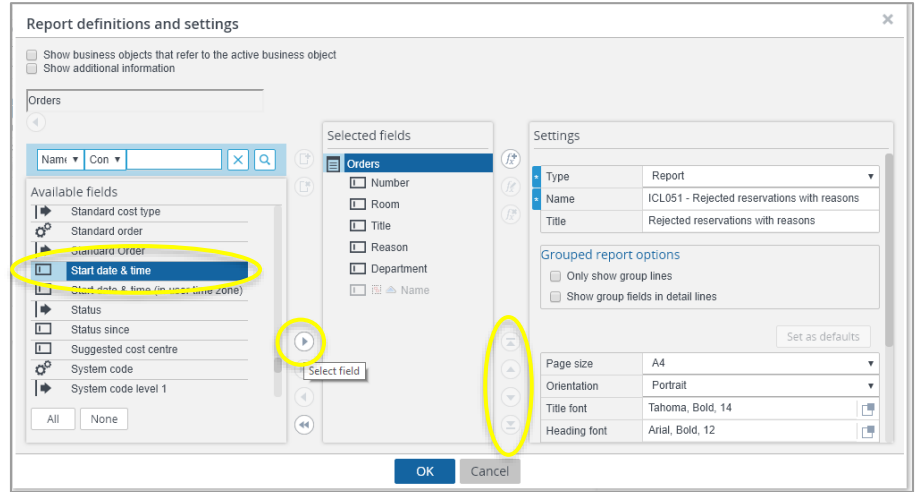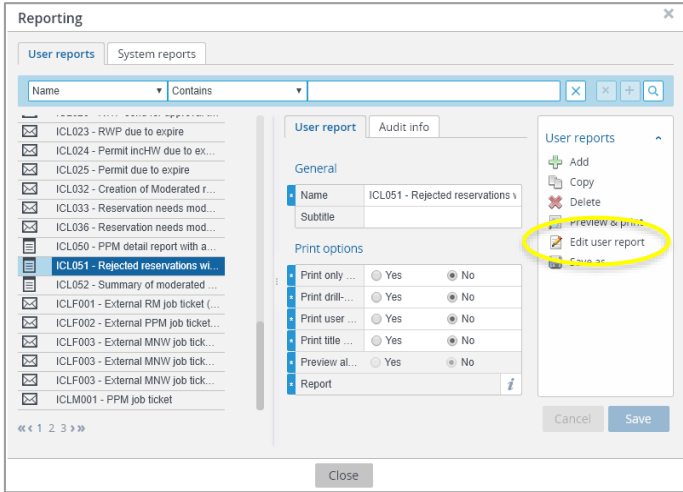
4) If you would like to include the date and time of the reservation in your report, select "edit user report" in the right-hand menu.

5) In the pop-up window, select "Start date & time" and move it across to the "Selected fields" window. The order of the fields in the report can also be adjusted using the arrows at the side.

Reporting – Rejection reasons for moderated rooms

6) The appearance of the report can also be edited here. For example, the orientation of the report can be changed from Portrait to Landscape to ensure it fits on the page to be printed.

7) Once you are happy with the report, either select 'Preview & print' to generate a PDF of the report, or select 'Save as' to save a copy.