Reservation policies

Planon Software Suite

Version: L111

Planon

Building Connections

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About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About Reservation policies

The **Reservation policies** TSI provides advanced control over the reservation process for different user groups (students and teachers, for example) and reservation units (spaces and assets, for example). You can configure specific rules and restrictions, ensuring a seamless and compliant reservation experience tailored to each group's needs. Reservation policies are applied whenever a reservation is made.

Examples of reservation policies:

- A student can only reserve a unit seven days in advance.
- A teacher can reserve a unit outside of office hours.

Concepts

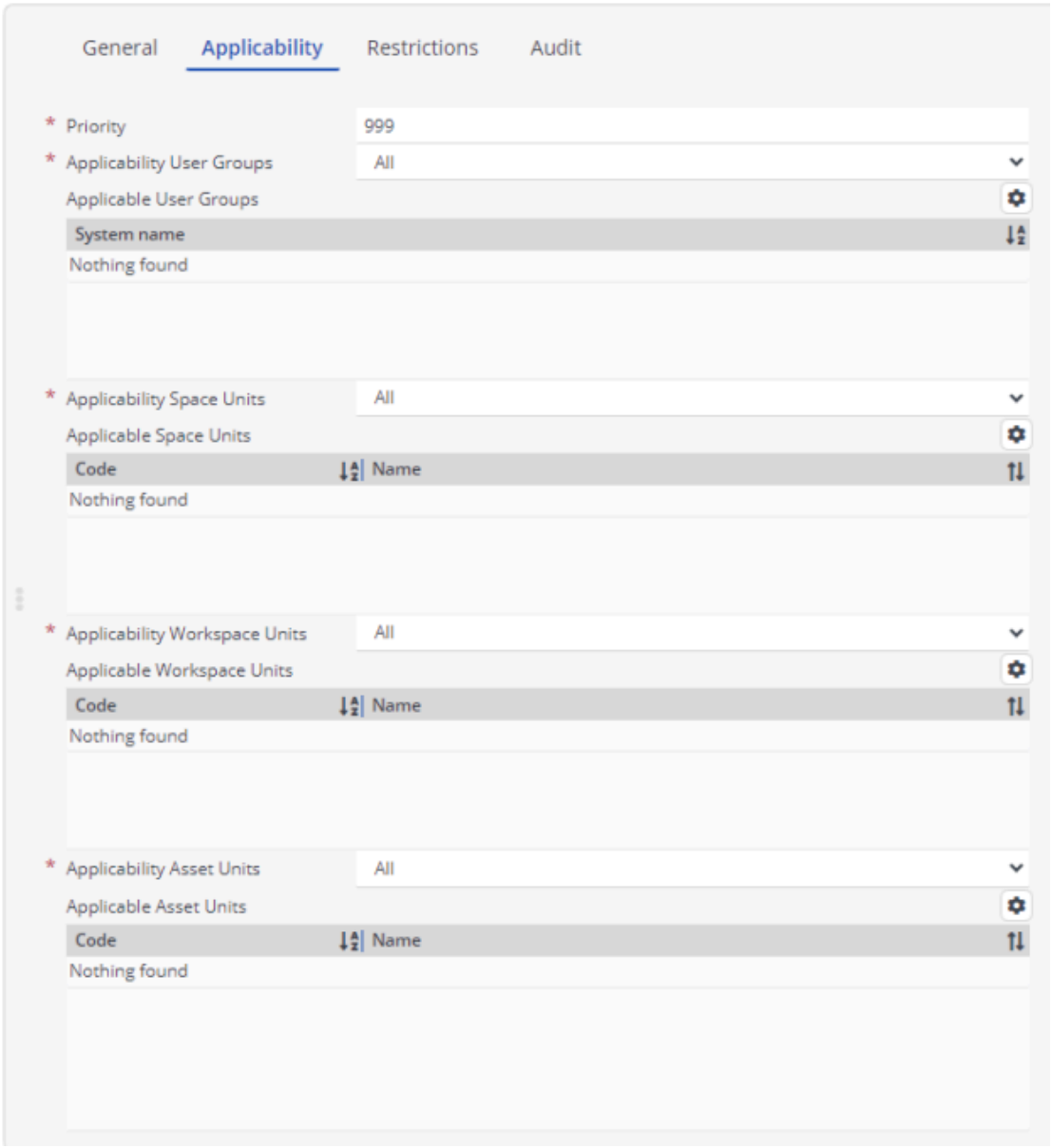
The following topics describe the concepts that are key to understanding the functionality.

Reservation policy applicability - configuration

The applicability of a reservation unit is determined by several factors:

- **Priority**: The unit's priority level dictates when it takes precedence over others.
- **User Groups**: The unit's applicability depends on its association with specific user groups, determining which groups can reserve it.
- **Reservation Units**: Its association with other reservation units influences when and how it can be reserved in relation to other units.

These factors together establish when and by whom the reservation unit can be booked.



Applying a reservation policy to user groups

The reservation policy that applies depends on the user group that is configured for the reservation policy. You can configure applicability for user groups by selecting one of the following options in the **Applicability - user groups** field:

- **All** (default): The policy applies to all user groups.
- **Including**: The policy applies only to specific user groups.
- **Excluding**: The policy does not apply to specific user groups.

Applying a reservation policy to space units

The reservation policy that applies to spaces depends on links that are configured for the reservation policy. You can configure applicability for space units by selecting one of the following options in the **Applicability space units** field:

- **All** (default): The policy applies to all space units.
- **None**: The policy applies to none of the space units.
- **Including**: The policy applies only to specific space units.
- **Excluding**: The policy does not apply to specific space units.

Applying a reservation policy to flexible workspace units

The reservation policy that applies to flexible workspaces depends on links that are configured for the reservation policy. You can configure applicability for workspace units by selecting one of the following options in the **Applicability workspace units** field:

- **All** (default): The policy applies to all flexible workspace units.
- **None**: The policy applies to none of the flexible workspace units.
- **Including**: The policy applies only to specific flexible workspace units.
- **Excluding**: The policy does not apply to specific flexible workspace units.

Applying a reservation policy to asset units

The reservation policy that applies to assets depends on links that are configured for the reservation policy. You can configure applicability for asset units by selecting one of the following options in the **Applicability asset units** field:

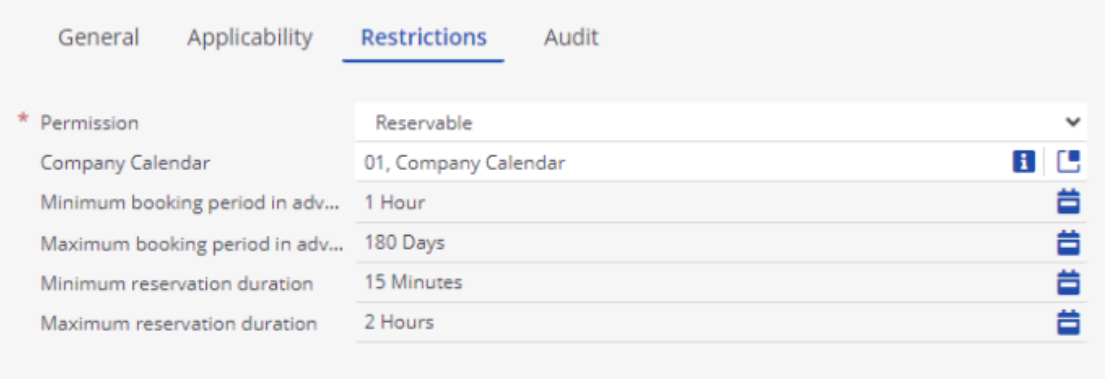
- **All** (default): The policy applies to all asset units.
- **None**: The policy applies to none of the flexible asset units.
- **Including**: The policy applies only to specific asset units.
- **Excluding**: The policy does not apply to specific asset units.

Add and configure a reservation policy

A reservation policy has two parts: **Applicability** and **Restrictions**. The applicability section defines when the reservation policy applies to a reservation. The restrictions section allows you to configure specific restrictions for creating a reservation. For more information on adding a reservation policy, see Adding a reservation policy.

Reservation policy's restrictions

When adding a reservation policy, you set rules for how and when reservations can be made. This helps administrators ensure fair use and prevent misuse of resources.



Reservation policies - priorities

If multiple reservation policies apply (for example a user belongs to several user groups), each policy is assigned a priority. The policy with the highest priority will take precedence over others in situations where more than one policy could apply.

This structured approach allows for precise control over reservations, ensuring that the policies are applied appropriately, based on user type and reservation unit.

The priority (the value **1** being the highest priority) of a reservation policy is used when multiple reservation policies are applicable based on the user group(s) of the user who creates the reservation and the ueservation unit of the reservation.

Working with...

This section describes the various functions available.

Adding a reservation policy

Procedure

1. Go to Reservation policies > Reservation policies selection level.
2. On the action panel, click Add.
3. Enter the required information on the data panel.

   For information on field descriptions, see Reservation policies fields.
4. Click Save.
5. On the action panel, set the status to Activated, if the policy is ready to be implemented.

   Example:

   Setting up a Reservation policy for meeting rooms

   This example helps illustrate how reservation policies can be tailored for specific user groups and time periods.

   You want to create a reservation policy that allows only the sales department to reserve meeting rooms during the weekdays, between 9:00 AM and 6:00 PM, for the next three months. Enter the policy name, for example, Sales department weekday reservation, set the applicable user group as Sales department and select the reservation type, in this case, Meeting rooms.

   Specify the reservable period. For this example:

   - Reservable Period From: Start of next month
   - Reservable Period Until: Three months later

   Define reservation rules

   - Set the allowed days of the week to Monday through Friday.
   - Set the time range, allowing reservations only from 9:00 AM to 6:00 PM.
   - Activate the policy.

With this policy in place, only users from the Sales department can reserve meeting rooms during weekdays between 9:00 AM and 6:00 PM, and only for the specified three-month period. If anyone outside of these parameters tries to make a reservation, it will be blocked.

Permissions for reservation policy

The permission in a reservation policy defines if the user can create a reservation or not. It can be set to one of the following options:

- **Reservable**: You are allowed to create a reservation.
- **Not-reservable**: You are not allowed from creating a reservation.

> If no value is selected, the reservation policy will default to the applicable corresponding configuration (if present) for the reservation unit.

If the user is permitted to create a reservation, all other restrictions listed below will also apply:

- Company calendar
- Minimum period in advance
- Maximum period in advance
- Minimum duration
- Maximum duration

Company calendar

When you configure a Company calendar for a reservation policy, it must be applied whenever a user from a relevant user group makes a reservation for an applicable unit. The company calendar configured on the reservation policy will override any corresponding configuration set on the reservation unit. It also overrides the following settings on the reservation unit:

- Allow outside office hours
- Allow on non-working days

Minimum period in advance

When you set a minimum period in advance in the reservation policy, it is applied whenever a user from a relevant user group makes a reservation for an applicable unit. This ensures that reservations are made with adequate notice.

Maximum period in advance

When you set a maximum period in advance in the reservation policy, it is applied whenever users from relevant groups make reservations for applicable units. This setting limits how far in advance reservations can be made and overrides any similar settings on the reservation unit. Reservations can only be scheduled within the specified time frame (for example; a reservation can only be made up to 180 days in advance).

Maximum duration

When you set a maximum duration in the reservation policy, it must be applied whenever a user from a relevant group makes a reservation for an applicable unit. This policy overrides the corresponding configuration on the reservation unit.

Minimum duration

When you configure a minimum duration in the reservation policy, it must be applied whenever a user from a relevant group makes a reservation for an applicable unit.

Reservation policies fields

Field	Description
Applicability - user groups	Select a relevant user group option to which the reservation policy is applicable. If you select the options **Including** or **Excluding** from the list of options, the links in the action panel are available to select the relevant option.
Applicability asset units	Select a relevant asset unit option to which the reservation policy is applicable. If you select the options **Including** or **Excluding** from the list of options, the links in the action panel are available to select the relevant option.
Applicability space units	Select a relevant space unit option to which the reservation policy is applicable. If you select the options **Including** or **Excluding** from the list of options, the links in the action panel are available to select the relevant option.
Applicability workspace units	Select a relevant workspace unit option to which the reservation policy is applicable. If you select the options **Including** or **Excluding** from the list of options, the links in the action panel are available to select the relevant option.
Code	Enter a code to uniquely identify the reservation policy.
Name	Enter a name to for the reservation policy.
Permission	Select a relevant permission option (**Reservable** / **Not reservable**) to which the reservation policy must apply.

Field	Description
Priority	Enter a number to set the priority level to the reservation policy.
System status	Displays the status of the selected reservation policy (**Activated** / **Deactivated**).
System code	Displays the system code of the selected reservation policy.
Property set code	Displays the property set code of the selected reservation policy.
Company calendar	From the period picker in this field, select the applicable company calendar.
Maximum duration	Specify the maximum duration for which a reservation unit can be reserved.
Minimum duration	Specify the minimum duration for which a reservation unit can be reserved.
Maximum period in advance	From the period picker in this field, select the maximum period a reservation unit can be reserved in advance.
Minimum period in advance	From the period picker in this field, enter the minimum period a reservation unit can be reserved in advance.
Reservable period from	Specify the start date from which the reservation unit can be reserved. (Reservations cannot be created before that date.)
Reservable period until	Specify the end date up to which the reservation unit can be reserved. (Reservations cannot be created after that date.)

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