Planon app - Workplace solution

Planon Software Suite
Version: L107

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.

Table of Contents

About using the Planon Workplace app

The Planon Workplace app is part of the **Planon Live** mobile app. The Planon Live app is the 'shell' application that you can download from the relevant app store. It can hold various licensed apps, like the Planon Workplace app .

With the app, you can engage with your physical workplace in the sense that you can quickly:

- find your co-workers
- make reservations (book meeting rooms and flexible workspaces)
- find information on your personal inventory
- report any workplace issues that need to be solved

The app includes the following ready-to-use modules that will serve this purpose:

- **Colleagues**
- **Bookings**^{new}
- **Reservations**
- **My inventory**
- **Requests**
- **Spaces**
- **External links**

The availability of these app modules is licence-dependent.

See also Downloading and logging in.

Downloading and logging in

Before you can use the licensed features of the Planon Planon Workplace app , you must download **Planon Live** from the relevant App store (iOS) or Play store (Android). Planon Live is the application in which the various Planon Workplace app modules are running.

You can also scan a QR code to open the store and download the app:

Good to know:

If your organization is migrating to the new improved version of this application, which is recommended, you can download the **Planon** app from the store.

ⓘ The new app will only work if the Planon system administrator has completed the migration from the old app to the new.

… or scan this OR code to download the **Planon** app:

Procedure

1. After downloading, start Planon Live / **Planon** on your device.
2. Type the URL to your Planon environment ...

or

3. … open the QR code scanner at the top right of the login screen and scan a QR code that represents the environment URL.

Application administrators can use a QR code generator to convert the environment URL into a QR code and provide it to app users.

4. Enter your Planon credentials (user name and password).

The app opens and is ready for use. The Planon Workplace app content available to you depends on the specific configuration that has been applied to the app.

Generic features and settings

In addition to the functional modules, the Planon Live app includes several generic features: **Edit profile**, **Scan** and **Settings**.
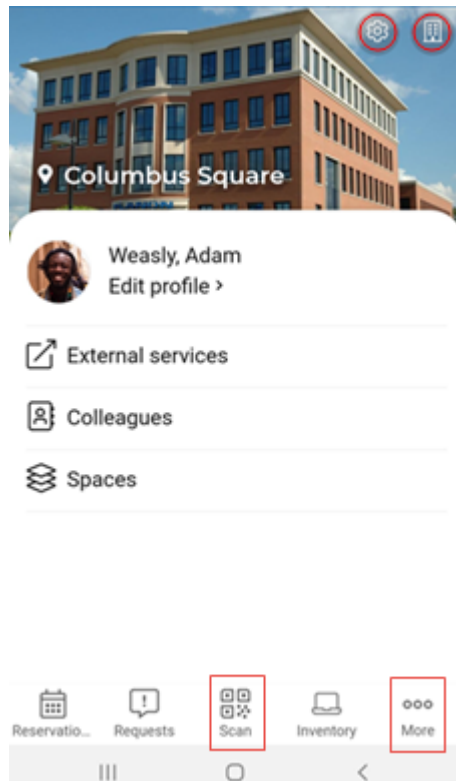
Edit profile

If you select the **More** (ᵒᵒᵒ icon), you can tap the **Edit profile** option, to edit your personal details, in as far as they are editable.

Scan (QR code / NFC tag)

If you scan the **QR code** or **NFC tag** of a space, then one of these modules is opened:

- If the scanned space is a reservation unit, the **Reservations** module is opened. To create reservation, refer to Reservations.

- If the scanned space is not a reservation unit, the **Spaces** module is opened. see also Spaces.

> **ℹ** When you scan the **QR code** of a meeting room (space unit) or desk (workspace) while you have an active reservation for it, the **Reservation details page** is automatically opened, to make it easier to add a request or adjust the reservation.

Change property

To change the property, tap the **Property** icon at the top-right corner of the screen.
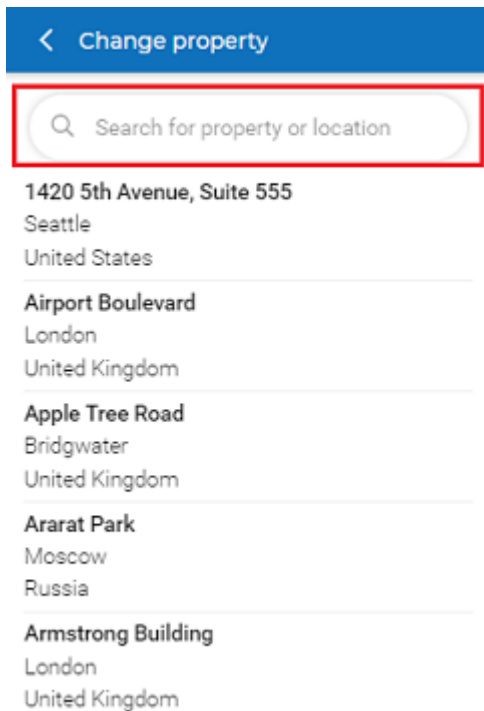
A list of properties is displayed, from which you can select the property. The search field allows you to search for the properties by entering a name of the property.

Settings

To change the settings of the Planon Live app, tap the **Settings** icon at the top-right corner of the screen.

The options listed in the settings menu are:
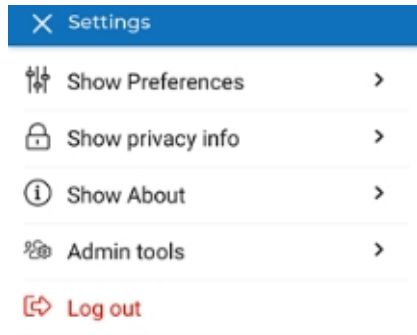
- **Show preferences**: At **Display style**, select either **Tablet** or **Mobile**. At **Dark mode**, switch the **Dark** theme on or off.

- **Show privacy info**:

  - **Privacy statement**: If you want to view the applicable privacy statement, tap the link in the **Privacy** menu, to open the link in your default browser. This is only possible, if your application manager has added the link in the **System settings** TSI > **General settings**. If there is no privacy statement link added, the message **No privacy statement available** is displayed in the privacy menu. See General settings fields.

  - **Show workspace location?**: if you want to hide your current location (based on your reservation data) from the floor plan and from the **Office attendance** block on the app, switch this setting off. You will get a confirmation that your privacy settings are updated.

> If the setting **Show workspace location?** is enabled, the text **Hidden by user** is displayed on the **Attendance** and **Availability** blocks.

- **Show about**: Displays the **URL** used for logging in, the related **Planon version** and **Store version**.

- **Admin tools**: If you belong to a linked user group with 'admin' rights, tap this option to get access to admin tools within the app. For example, the **Write NFC tags** option. With this option, *Android* phone users can be allowed to scan Planon QR codes and write the content to NFC tags, from within the Planon Live app. They can write NFC tags for spaces, workspaces and assets. See also: Writing NFC tags for the Planon Live App.

> For more information about on granting 'admin' rights within the app, see Start page in the *Mobile configuration - Planon Live app* documentation.

- **Log out**: Tap the **Log out** option if you want to log out. A pop-up appears. You can confirm by tapping **Log out** or you can **Cancel** to return to the app.

> • If the app configuration is updated by an application manager in Planon ProCenter , you must log off and log on again to see these updates in the Planon Live app.
> • Because the modules of the Planon Live app are configurable, any examples given may deviate from what is displayed on your app. For more information on **App configuration**, see About Planon Live - App Configuration.

Generic features and settings

Specific features

In addition to general features and settings, the Planon Workplace app includes several specific features: **Location display**, **Notifications** and **Gesture navigation**.

Location display

In the Planon Workplace app , you can display the location of **spaces** and **workspaces** on a floor plan if you tap the location icon at the top-right corner of the screen.
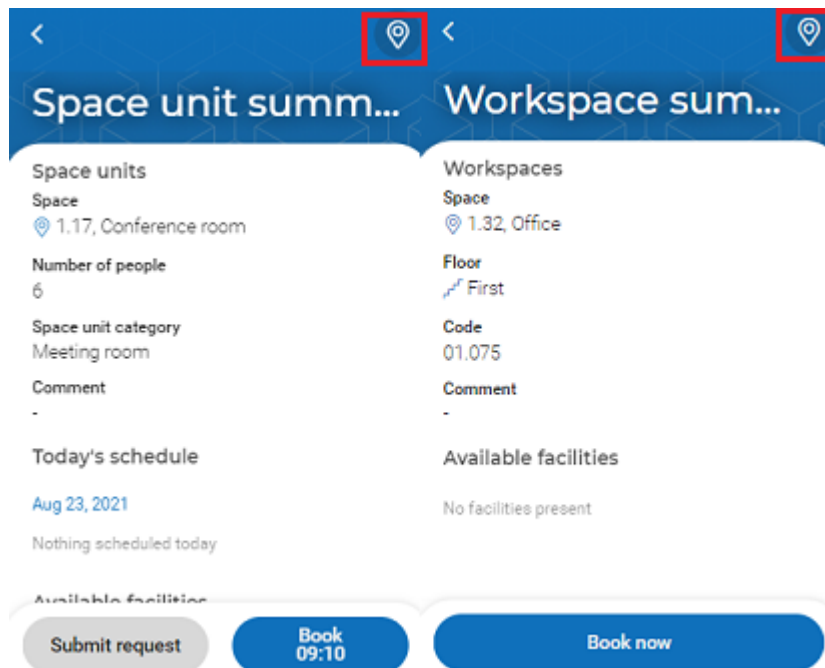
Notifications

When you have a visitor whose status is set to **'Arrived'** by the back-office, you will receive a notification with the text: **'Your visitor <visitor name> has arrived'**. By clicking on the notification, the Planon Workplace app opens in the most recently used module.

> ⚠️ This feature is not available on-premise, nor in the data center regions London and Canada.

Gesture navigation

To use the gesture navigation options available for the Planon Workplace app you must enable gestures settings on your phone. See this external link: Gesture navigation.

Writing NFC tags for the Planon Live App

Assets, spaces and flexible workspaces can be identified using NFC tags (NFC = Near Field Communication). The NFC tags hold a chip on which you can 'write' Planon data. If a phone with the Planon Live App comes in close proximity of the configured NFC chip, it will be able to scan and read the Planon data on the chip and act on that data.

With a correct user group configuration in the **App - configuration** TSI > **Mobile startpage** web definition, your mobile device can write data onto blank NFC tags.

> To be able to use this feature, you need 'admin' permissions. For more information about on granting administrator rights within the Planon Live app, see Start page in the *Mobile configuration - Planon Live app* documentation.

> The Planon Live app currently only supports *writing* NFC tags on Android devices. Reading NFC tags however, is supported for both Android and iOS.

Extracting information and writing the NFC tag

1. Log on to the *Planon ProCenter* web client.
2. Go to a relevant TSI (Assets, Spaces, Reservations).
3. Select the relevant selection level; if you want to burn a tag for an asset, go to the **Assets** TSI > Assets level.
4. Click on the item (asset) you want to be able to identify / read with the NFC tag.
5. On the action panel, click Generate QR code.
6. Make sure you have the NFC tag(s) to be burned at hand.
7. Open the Planon Live app and navigate to Settings > Admin tools > Write NFC tag.
8. Use the camera to scan the QR code that was generated in the Planon webclient.
9. In the Planon Live app, tap Write NFC tag and select one of two options:

   ◦ **Write** - this option allows the tag to be written and overwritten

   ◦ **Write permanent** - this option prevents the written tag from being overwritten

10. Now hold your phone close to the NFC tag.

    If the NFC tag is written successfully, you are notified.

11. Write more NFC tags as required or tap Close.

12. Verify if the tag works by selecting the tag with a mobile device on which the Planon Live App is installed.

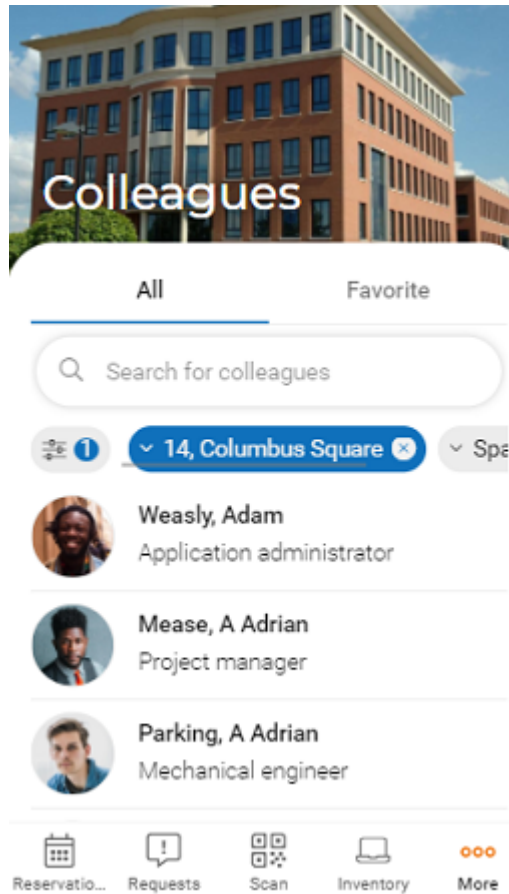**The Planon Live App should open automatically and navigate to the right record.**
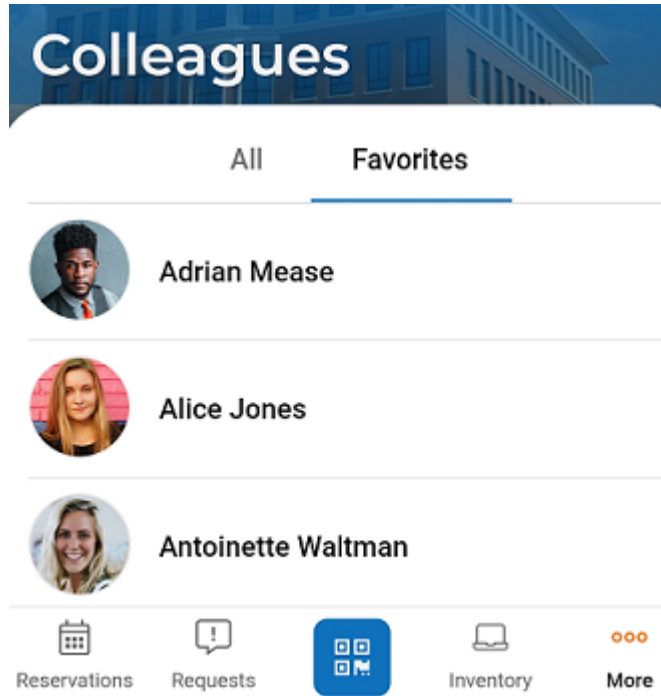
Colleagues

Module in the Planon Workplace app that helps you find information on your co-workers.

The **Colleagues** module consists of two tabs:

- **All**: Displays the full list of co-workers.

- **Favorites**: Displays the list of people you marked as favorites. See Marking a colleague as favorite for the procedure.

If configured on your app, you also have the options to quickly filter the colleagues.

On the **All** tab, start typing the person's first name or surname in the search bar to find your colleague.
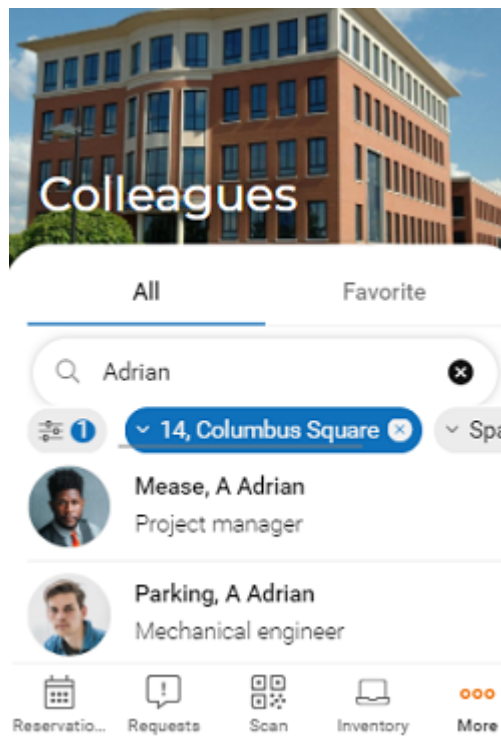
Select the person and view details such as phone number or current location:
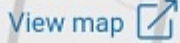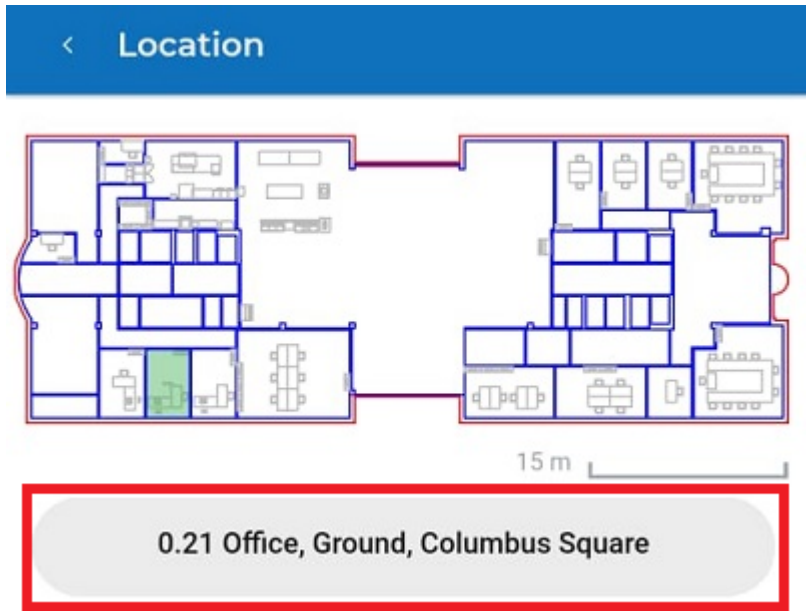
Click on **View map** to know the location of the colleague. The location of a colleague is shown in the CAD drawing as text (space, floor, property).
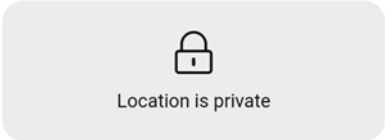
> **i** If the reserved workspace of a colleague has a reference to a fixed workspace in the Planon ProCenter , the desk will be highlighted on the floorplan.

> **i** If a person's location is set to **private** no location details will be displayed:
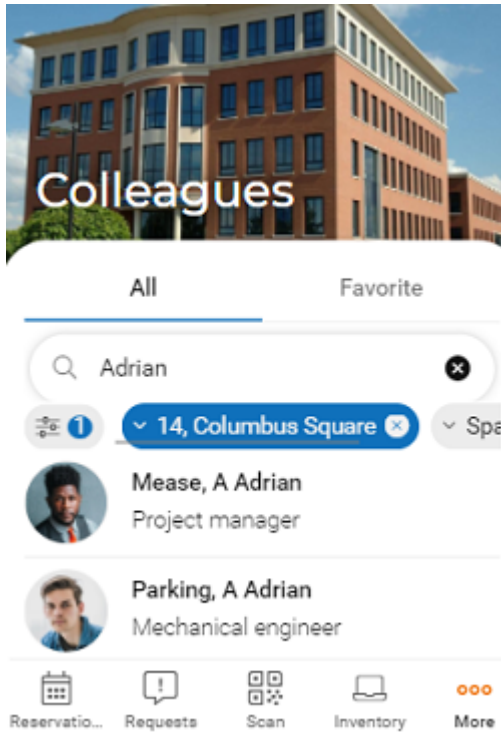>
> **Location**
>
> 🔒
> Location is private

Marking a colleague as favorite

On the Planon Workplace app , you can add the colleagues that you contact frequently to a list of *favorites*. This list will help you find their contact information and location more quickly.
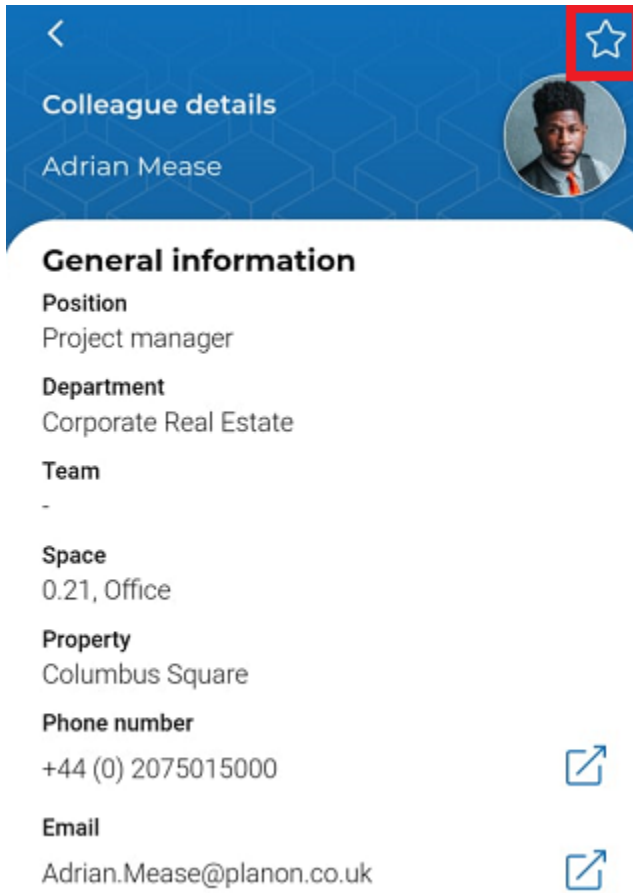
Procedure

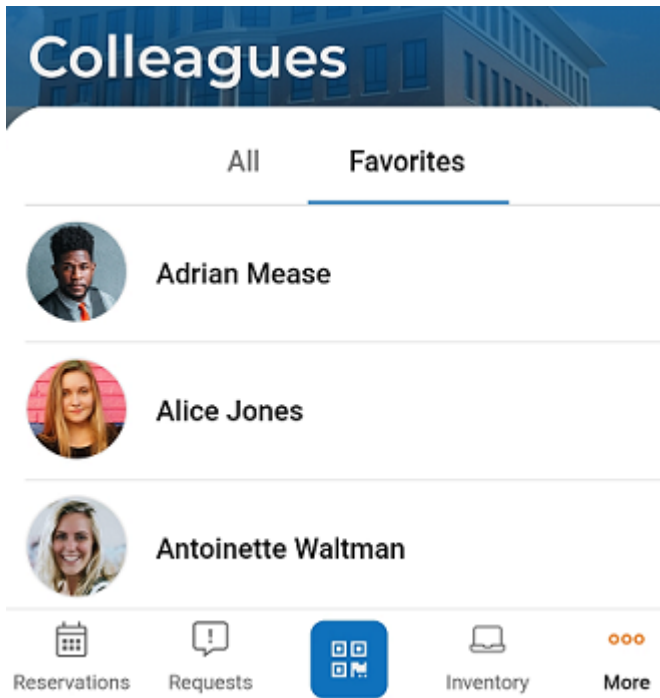1. In the search bar, start typing a person's first name or surname.

A list of co-workers that match the search criteria is displayed.

2. Select the person you are looking for.

3. Tap the Star icon at the top-right corner of your screen.

   The colleague is marked as favorite and listed on the Favorite tab of the Colleagues module.

4. To remove a colleague from the list of favorites, click the Star icon at the top-right corner of your screen.

The colleague is removed from the Favorite tab of the Colleagues module.

Finding a colleague's location

The Planon Workplace app can help you find out where a colleague is currently working or meeting.

> ℹ️ Your colleagues might block you from viewing their location via their privacy settings. In that case you cannot retrieve their current work location.

Procedure

1. On the Planon Workplace app , select the Colleagues module.

2. Select the person whose location you want to find.

3. At the bottom of the page, tap Location > View map.

   The floor plan opens, with your colleague's current location highlighted.
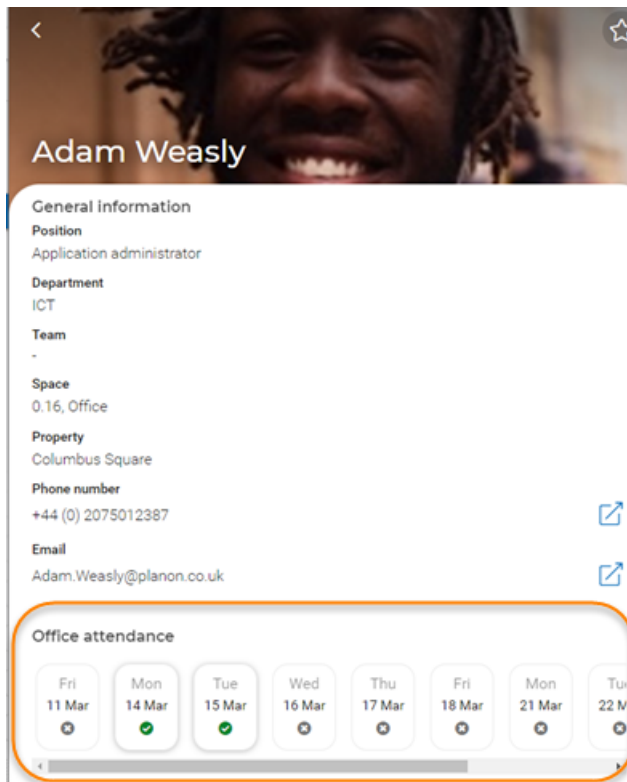
Viewing a colleague's office attendance

The Planon Workplace app can help you find information on a colleague's office attendance, by displaying their upcoming space or workspace reservations.

> ℹ️ Your colleagues might block you from viewing their office attendance via their privacy settings. In that case you cannot retrieve this information.

Procedure

1. On the Planon Workplace app , select the Colleagues module.
2. Select the person whose office attendance you want to view.
3. At the bottom of the page, view the Office attendance block.

Example:

the green check-marked reservations represent the space or workspace reservations your colleague has made for the upcoming period.

4. Additionally, you can find your colleague's location per reservation on the floor plan.
5. Tap a green check-marked reservation on the Office attendance block to open the reservation details.

6.

Tap the Location icon: .

The floor plan opens with your colleague's location for that reservation highlighted.

My inventory

Module in the Planon Workplace app that helps you find information on your personal inventory items.

The **My inventory** module is designed to help you find information on your personal inventory, such as office furniture, electronic devices etc.

The search field in the **My inventory** module enables you to quickly find your personal inventory items in the list.

If configured on your app, you also have the options to quickly filter on available Assets or on other Properties and Spaces than the current.

The module also enables you to:

- view previously submitted requests on your inventory items
- submit new service requests related to your inventory items

Laptop

General information

Code
APP0001

Date first used
5/21/2018

Brand
Dell

Comment
-

Reported incidents

No reported incidents

Request

Requests

Module in the Planon Workplace app that enables you to view the progress of your outstanding requests and to report new issues / submit new requests.

The **Requests** module is designed to check the progress of the requests you have submitted. To submit new requests, see: .

Your requests are categorized by status:

- **Reported**
- **In progress**
- **Completed**

You can expand / collapse the requests by using ∨ and ∧ icons.

Tap a request to view its details.

Request details

Request details block

Number
310.00

Status
Reported *

Asset ID
-

Space
-

Property
Columbus Square

Reported on
12/19/2022 11:22

Technically completed on
-

Comment
-

Creating a request

On the Planon Workplace app , you can add a service request for a meeting room workspace or report an issue that you have encountered there.

Procedure

1. At the bottom of your screen, tap Create request.

A New Request is displayed.
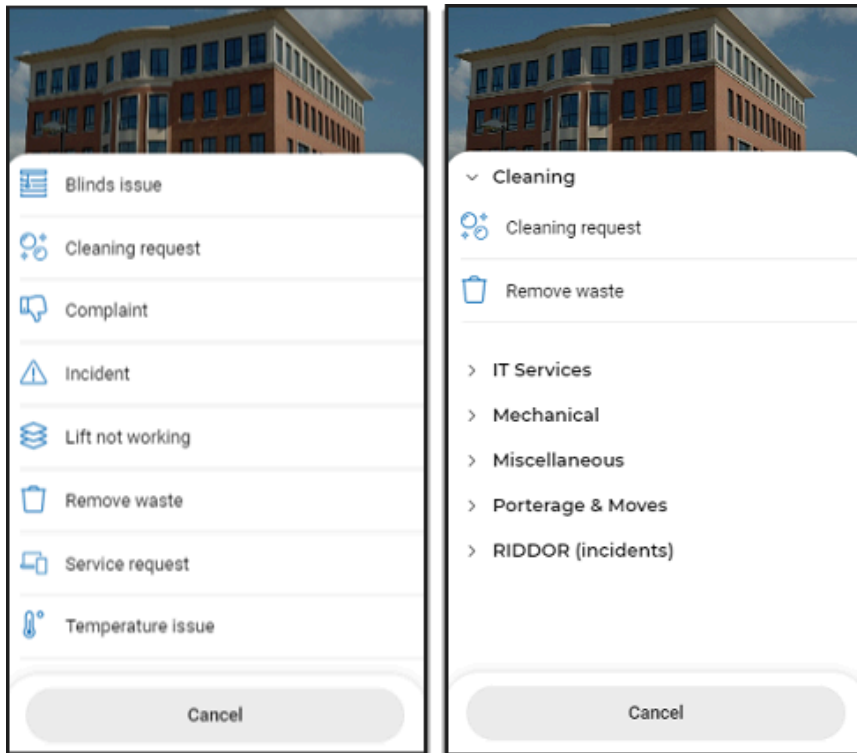
2. Select the drop-down of a relevant category, for example Cleaning or a request, and tap the request form, for example:

3. Fill in data on the form and add a photo, if required.

> ℹ️ The property is automatically filled with your location (location settings in the Planon Workplace app). However, if you open a request form by scanning an asset / space, the property and space of the scanned asset / space are filled in.

4. Tap Create.

Remove waste

Description

Waste removal request

Comment

Paper recycling container is full

Photo(s)

⊕ Add photo

Create

The request is added to the Reported section. The back-office can now start working on it.
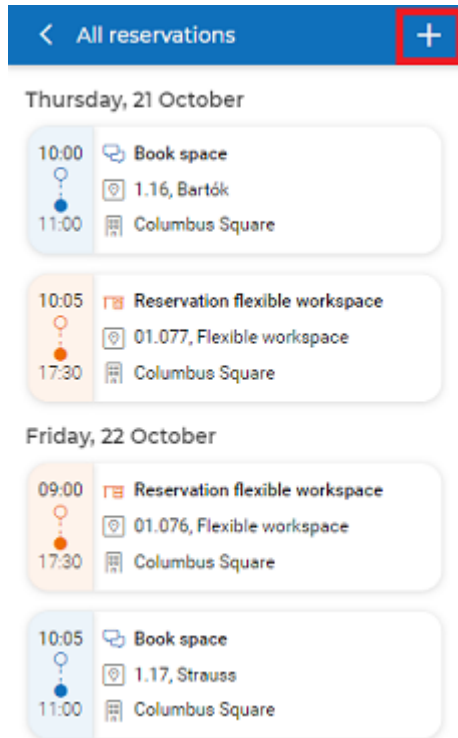
Reservations

Module in the Planon Workplace app that enables you to book meeting rooms or claim flexible workspaces.

The **Reservations** module is designed to support activities that involve booking / making reservations. Bookable spaces can either be meeting rooms (space units) or flexible workspaces (desks).

> ℹ Currently, an innovated version of the Reservations module is available in the Planon Planon Workplace app : the **Bookings** module. The two modules are very similar in functionality, but the **Bookings** module is less complex and has an improved user flow and visuals. See: Bookings.
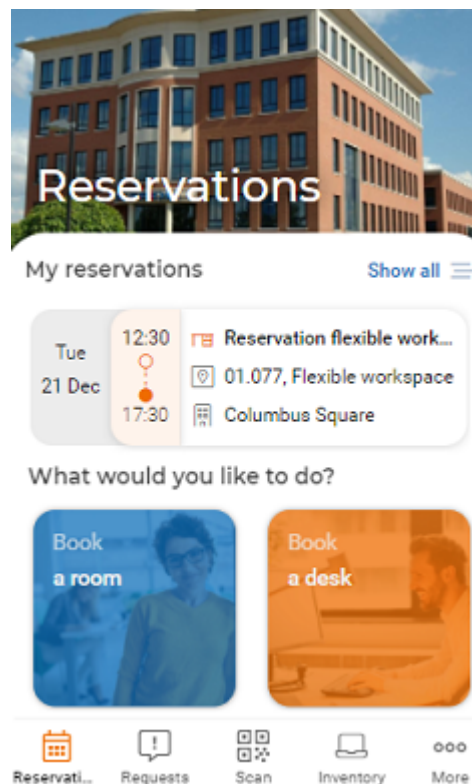

The app shows your upcoming reservations at **My reservations**. It also includes a **Show all** view that displays all pending reservations.
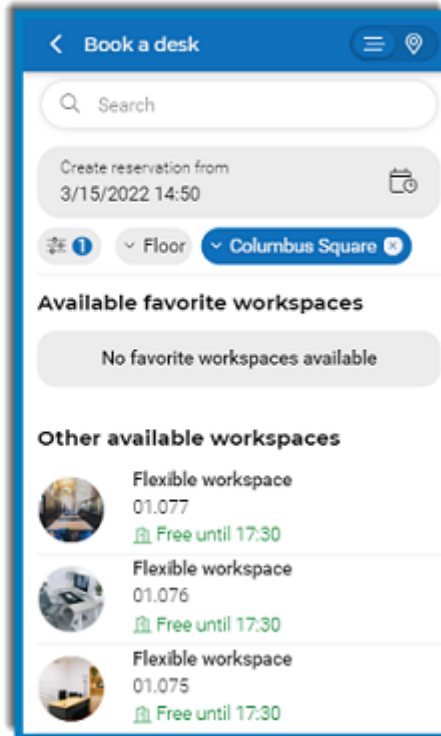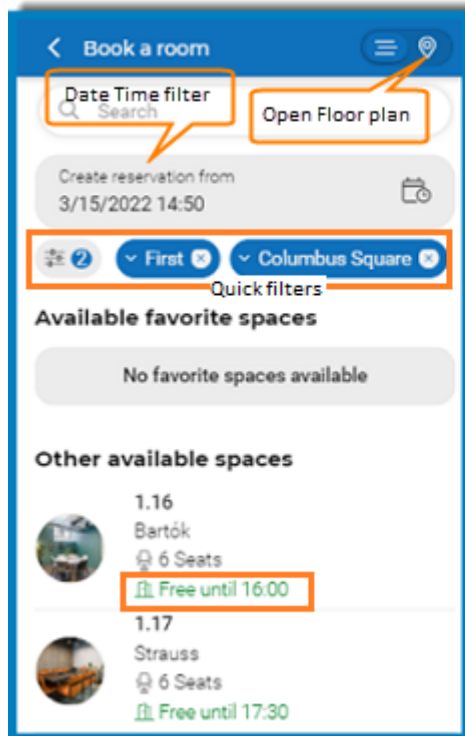
Booking reservation units (meeting rooms or desks)

In the **Reservations** module, you can immediately start booking a meeting room (space unit) or a desk (flexible workspace).

On the start page, tap **Book a room** or **Book a desk** to see which meeting rooms / desks are available.
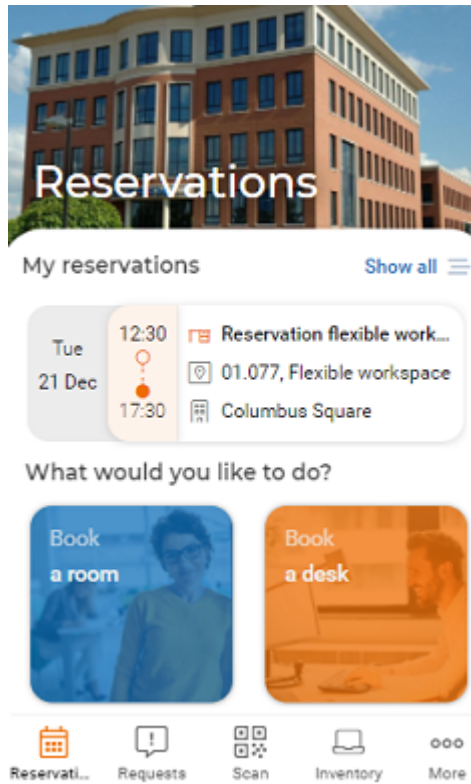
A list of available spaces / workspaces is displayed.

The **Free until** field shows how long a meeting room or desk is available. If there are no other reservations for the day, the field displays the end time of the working day.

There are various options to book a meeting room or desk:

1. **Immediate reservation** on the **Start** page. The filters are set to the current date-time and your property by default. If configured on your app, you also have the option to quickly filter on available **Facilities** or on other **Properties** than the current. Select a suitable meeting room / desk and tap **Book** / **Book now** on the details page to make the reservation.

> ℹ️ Use the search field to find available reservation units, by entering a code, name or reservation unit type. If you leave the search results page idle for longer than 5 minutes without actually booking, you must start over.

If a **Duration** filter is activated for space units, the **Book** button will be directly available on the list of space units, allowing you to make an instant reservation.
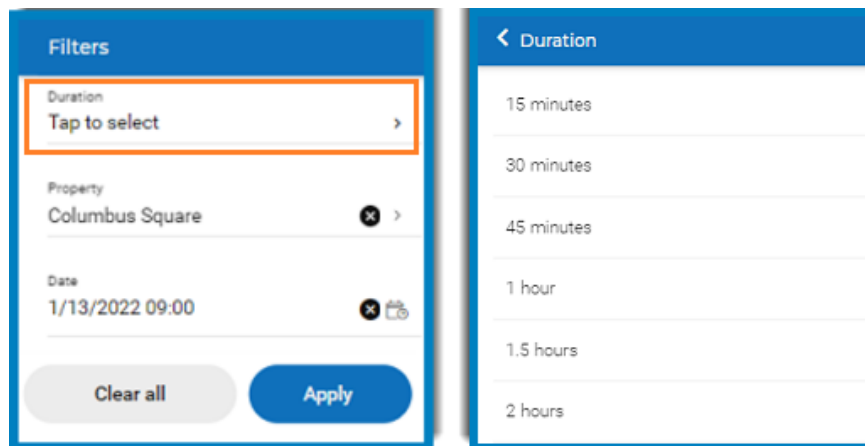
> ℹ️ If you select a duration, only space units that are available for the *whole* duration (taking the start time into account) are shown.

2. **Future reservation**: tap the **Selected date-time** filter and select a start date-time for your reservation.

> ℹ️ If the selected time is outside working hours, the **Meeting rooms** and the **Desks** are not shown in the list of available reservation units.
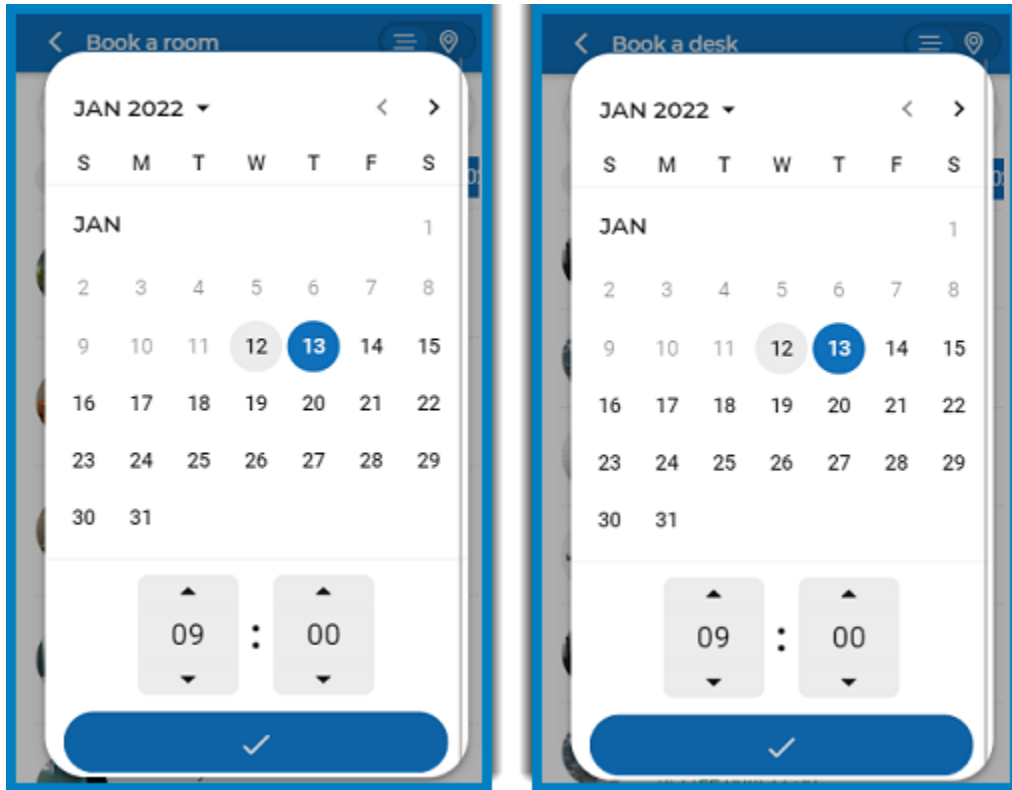
- ◦ Booking a room: select a room from the list and tap the **Book** button on the details page. The room is reserved for the selected time (filter) and end time (from the list).

    - ▪ You can select an end time from *3* suggested options, depending on your configuration; these options will have either 30 minute or 60 minute intervals.
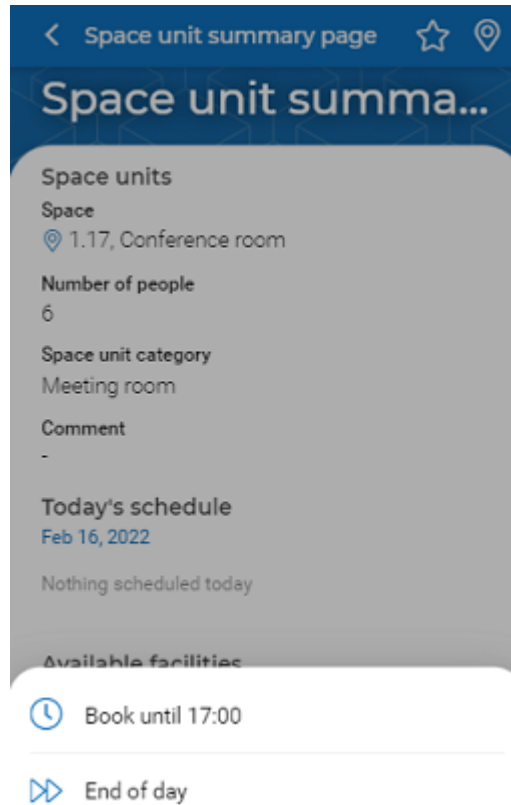
○ Booking a desk: select a desk from the list and tap the **Book now** button on the details page. The room is reserved for the selected time (filter) and chosen time (from the list).`

▪ You can select an end time from the suggested options, depending on your configuration; these options include several time intervals or the option to book until the end of the day.
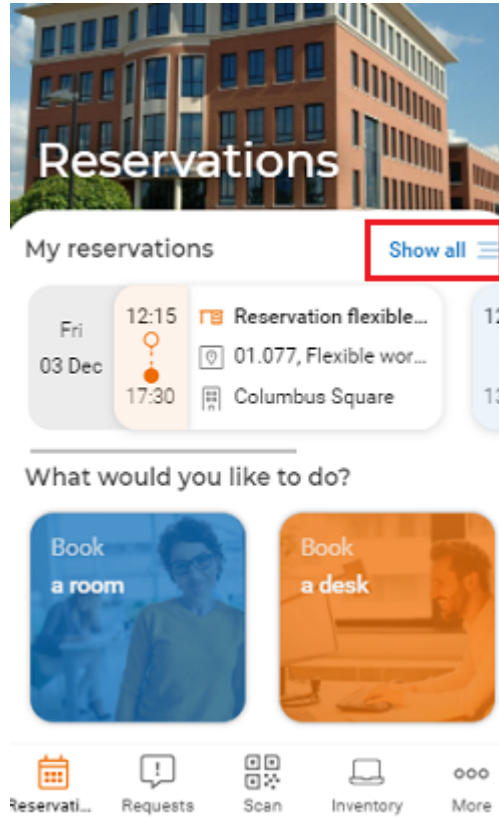
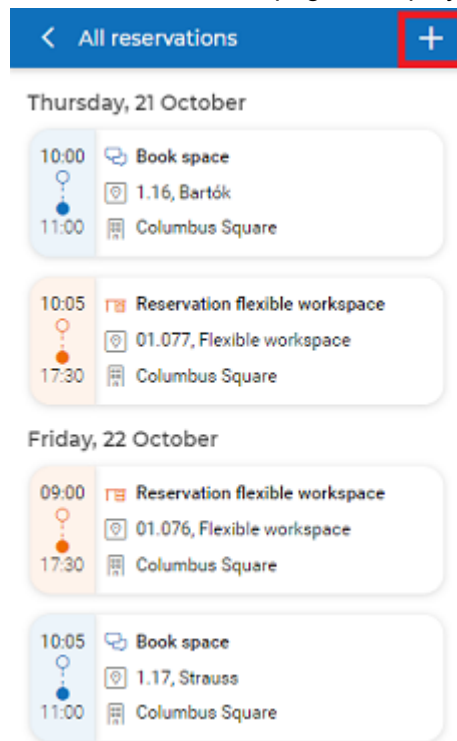> ℹ Only time intervals within working hours are shown.
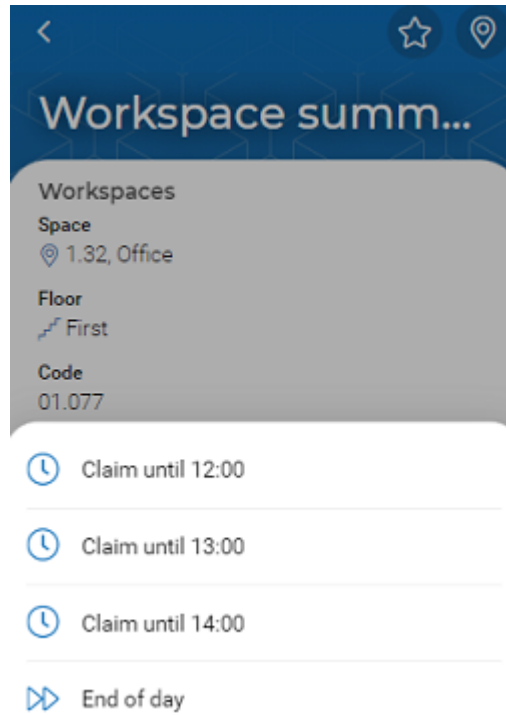
3. **New reservation** on the **All reservations** page.

Procedure

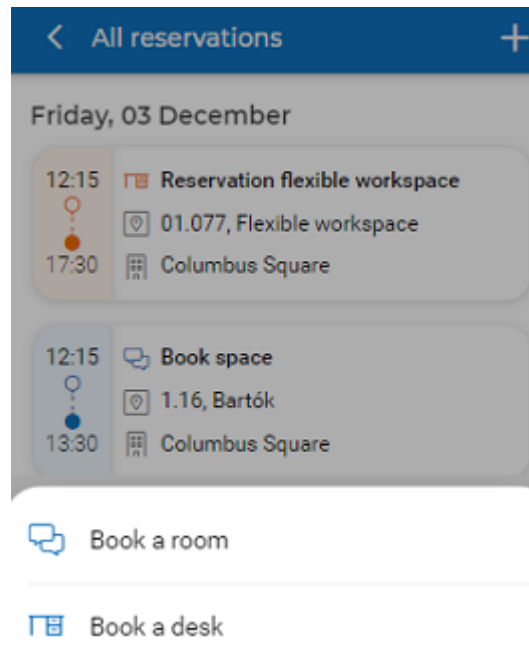- ◦   Tap **Show all** on the **Reservations** homepage.
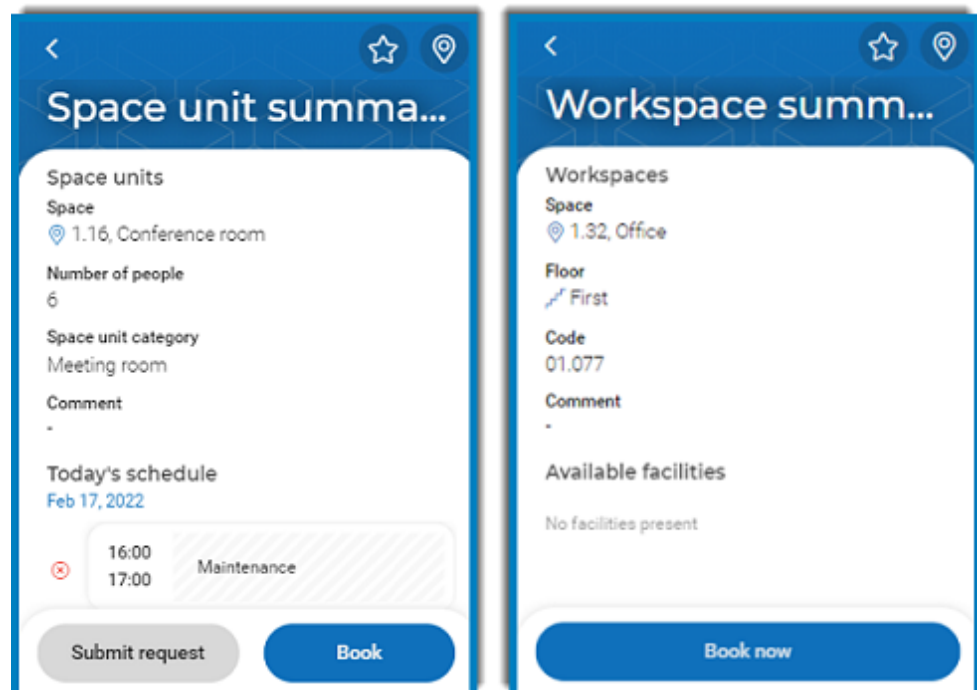
The **All reservations** page is displayed.

- ◦ Tap the plus icon at the top-right corner of the **All reservations** page.
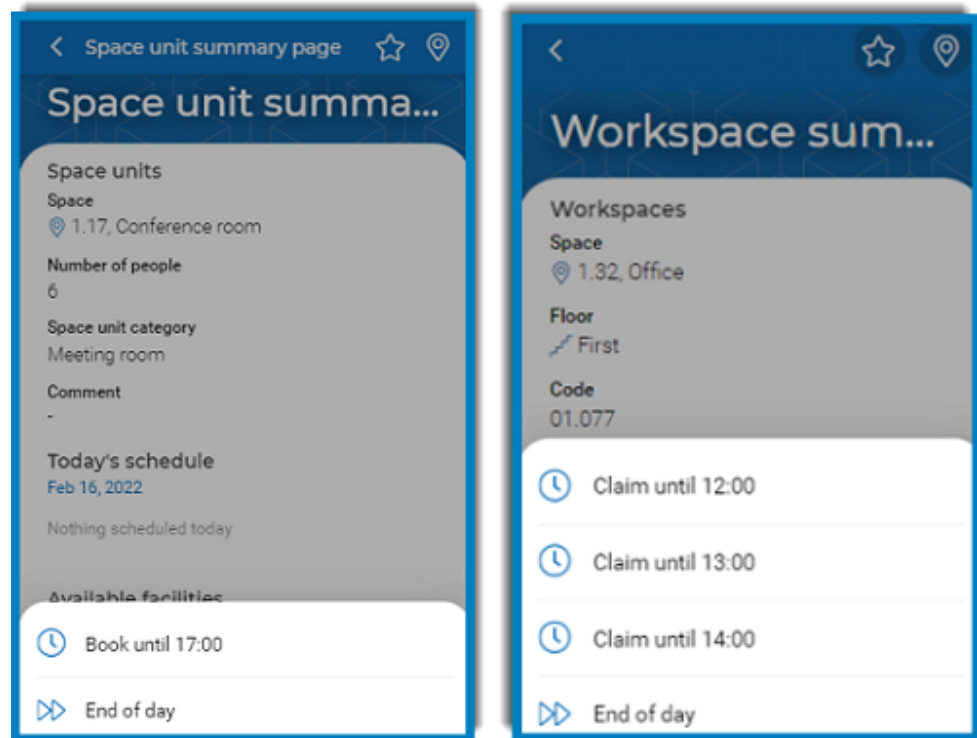
The booking options are displayed at the bottom of the page.
.

- ◦ Tap **Book a room** or **Book a desk**.
- ◦ Select a meeting room / desk from the list.

    The details page of the selected reservation unit is displayed.

- ◦ Select the **Book** / **Book now** button to make the reservation.

◦ Select an end time for the reservation.

The room / desk is reserved for the selected time. The reservation is displayed on the **My reservations** tab.

Additional information on booking rooms / desks:

- A meeting that is in progress can be *extended*, but only if there is no subsequent meeting scheduled. You can tap the **Adjust** button to extend an existing meeting with one of the suggested end time options.

- In the **Reservation details** screen, you can also **Adjust** the meeting or create a **Request** related to the meeting room or workspace, for example a cleaning request or a catering order.

- The maximum number of days in advance for booking a flexible workspace is based upon the value specified on the **Start page** of the **Reservations** module. If no value is specified, there will be no restrictions on picking a date.

- The **Book now** and **Book** buttons are not visible if the reservation unit is not available for booking. In the following cases booking is not possible:

  ◦ If you try to book *outside working / office hours*;

  ◦ If there is an active *non-bookable period* on the reservation unit;

  ◦ If the reservation unit is *occupied*;

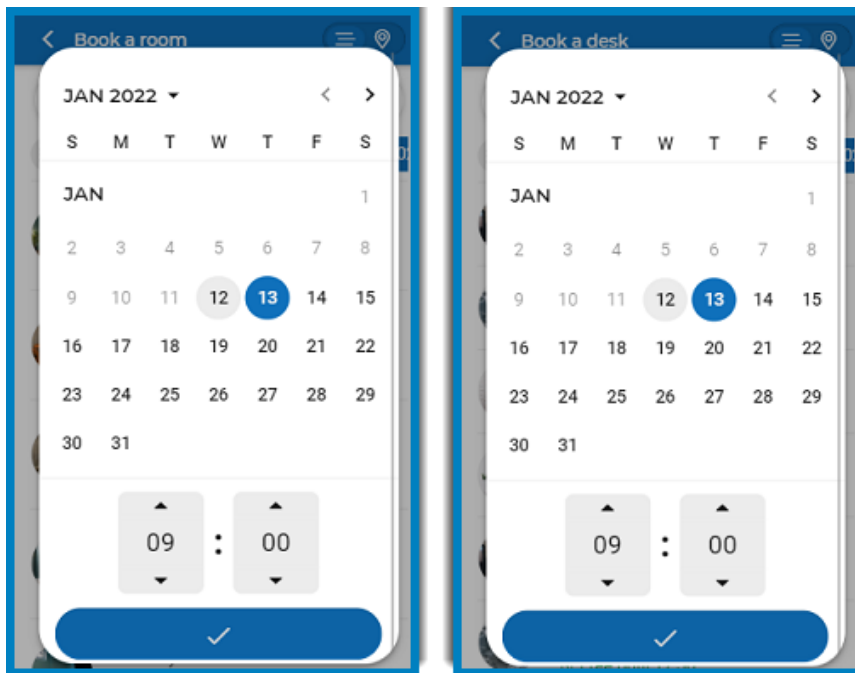 ◦ If a *workspace policy* applies (allowing you to book only one desk at a time);

◦　During an active *transition period*.

Booking reservation units via the floor plan

On the Planon Workplace app , you can book reservation units (meeting rooms or desks) via the floor plan.
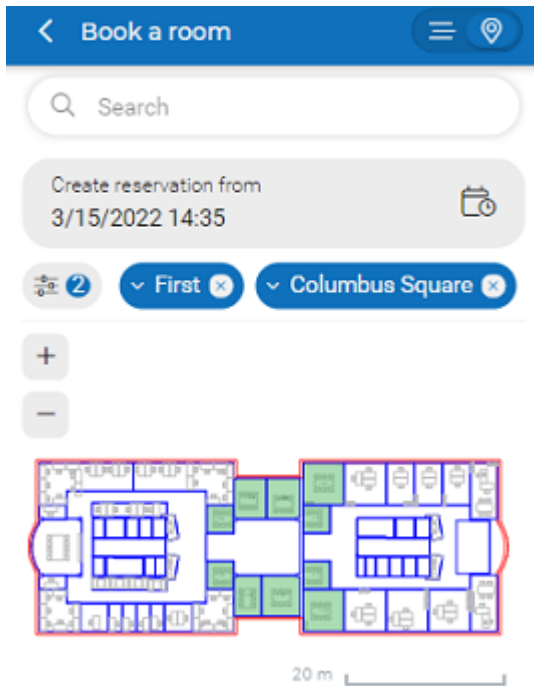
P r o c e d u r e

1. Set the start date-time for your reservation.

2. Set the Floor quick filter and select a floor.

3. Tap the Location toggle button in the header to switch from list view to floor plan view.

   **The floor plan of the selected property and floor is displayed.**

4. The availability status of a reservation unit is indicated with a color on the floor plan. The various colors and their meaning are shown below:

   ◦ **Green:** Available.
   ◦ **Gray:** Not available.
   ◦ **Orange:** Soon to be occupied (within 30 minutes).
   ◦ **Red:** Occupied.

> ℹ Use the plus and minus symbols to zoom in and out. Double-tap the floor plan to zoom in by 50% and zoom out.

5. Select a bookable (green) meeting room / desk from the floor plan.

   The details page of selected reservation unit is displayed.

6. Select the Book / Book now button to make the reservation.
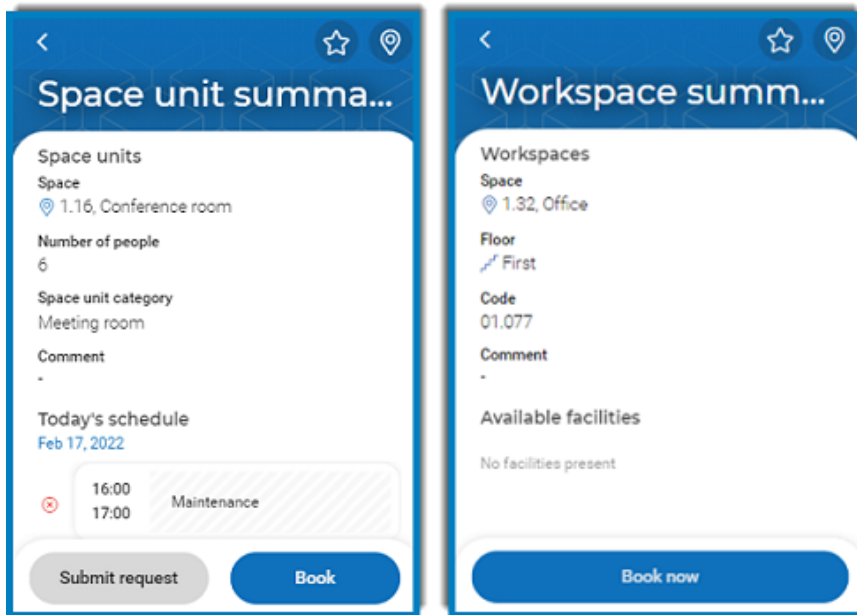
7. Select an end time for the reservation.
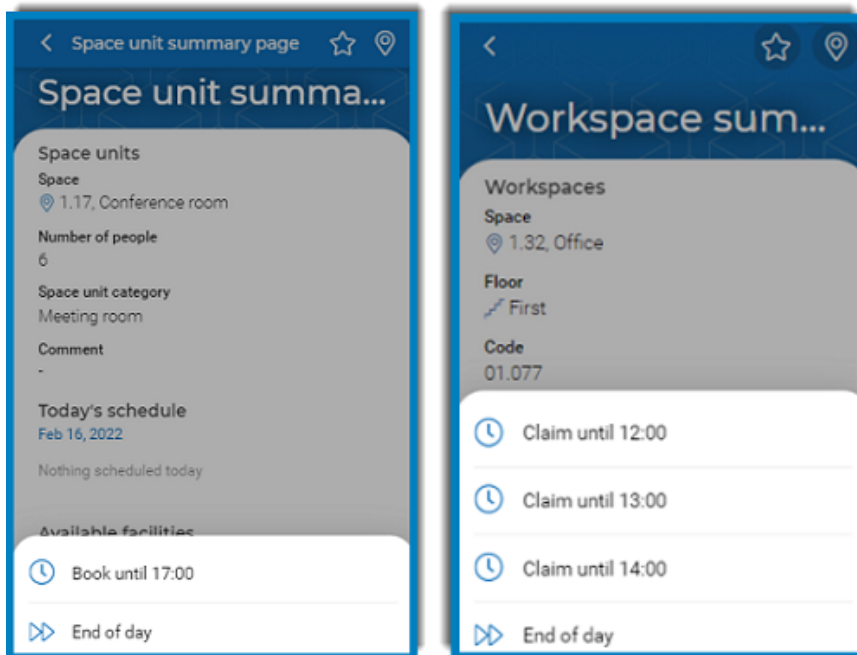
The room / desk is reserved for the selected period. The reservation is displayed on the My reservations tab.

8. To view the location of your reservation on the floor plan, tap the Location icon at the top-right corner of the screen.

The location is marked out with a light blue shade and will be automatically zoomed in, making the location on the floorplan more clearly visible.

1.16 Conference room, First, Columbus Square
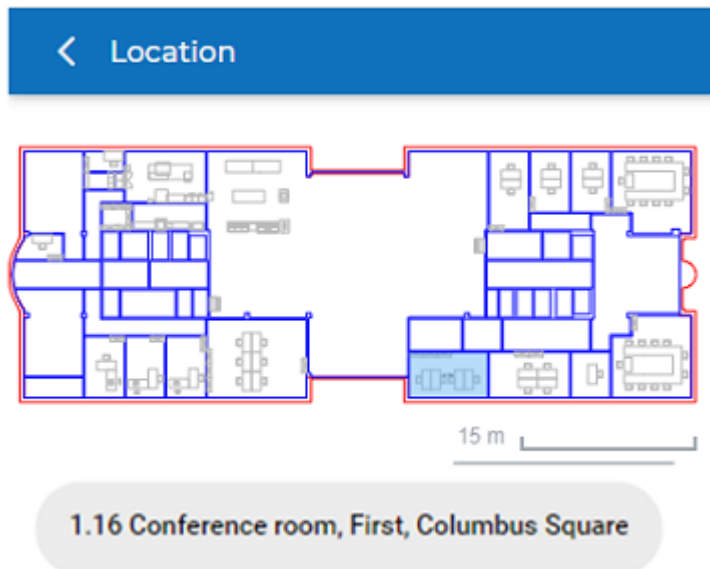
Checking in

By checking in, you confirm your presence at the reserved meeting room or workspace. If you already have created a reservation via your mobile app, Planon Self-Service or Outlook, just follow step 1 to check in. To make an instant reservation upon arrival and also check in, see steps 2 and 3.

1. When you arrive at the room / workspace, check in by scanning its QR code.

Check-ins are possible from 15 minutes before the start of the reservation, but also if a reservation has already started.

You are directed to the Reservations summary page.
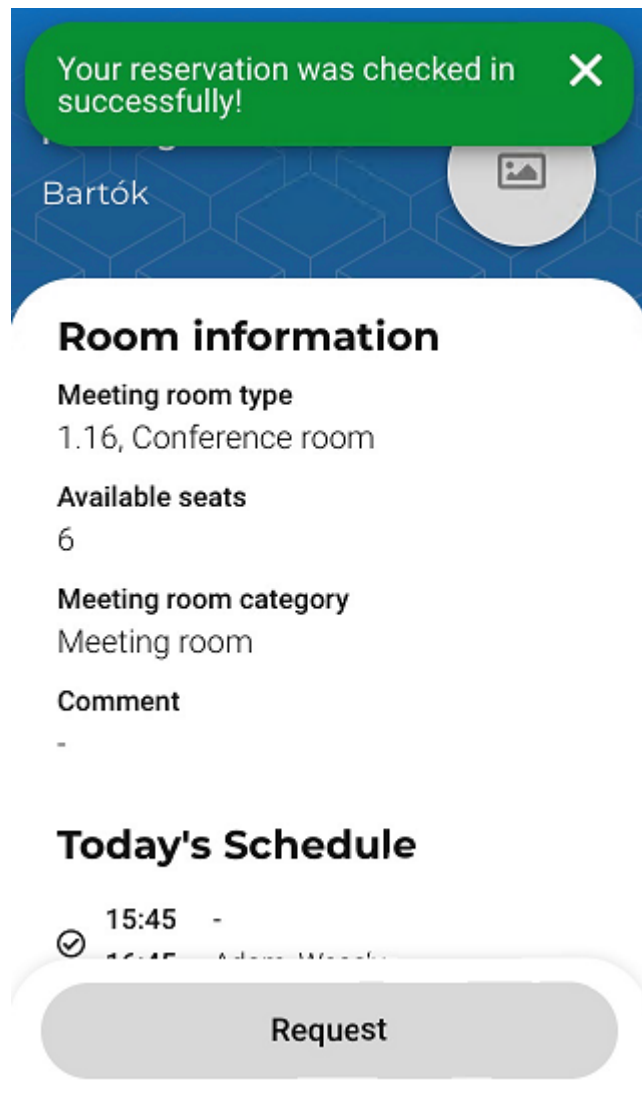
2. To make an *instant reservation* upon arrival at a meeting room / flexible workspace and check in immediately, scan the QR code.

3. Next, click Book (for a meeting room) or Claim (for a flexible workspace).

After a successful check-in, the back-office will be aware of this, because the status in the Booking utilized? field in Planon ProCenter is automatically set to Yes. This field also enables the back-office to calculate how many

times a room was booked and how many times it was actually used. If QR code scanning is not used for checking in, app users can claim / book a workspace / room by tapping the button, but this will not update the Booking utilized? field.

Viewing reservation unit details

If you tap a space or workspace you will see its details.

Availability: Under **Today's schedule**, the app provides information on the availability of this particular reservation unit.
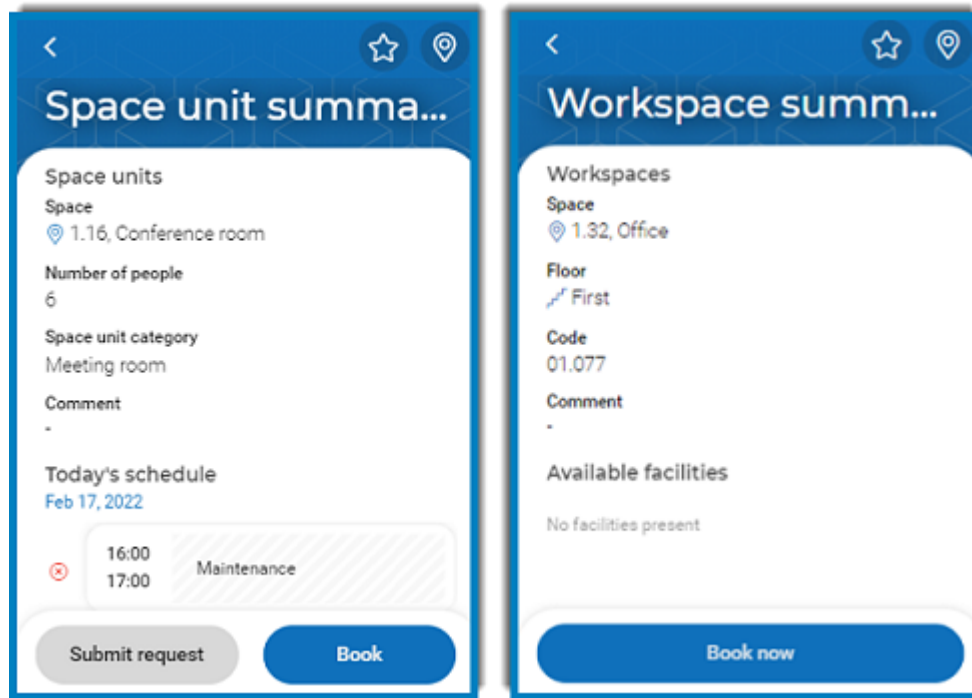
The facilities available for meeting room or desk are displayed below the **Available facilities**.

Favoriting a reservation unit

On the Planon Workplace app , you can add meeting rooms/ desks that you reserve frequently to a list of *favorites*.

Procedure

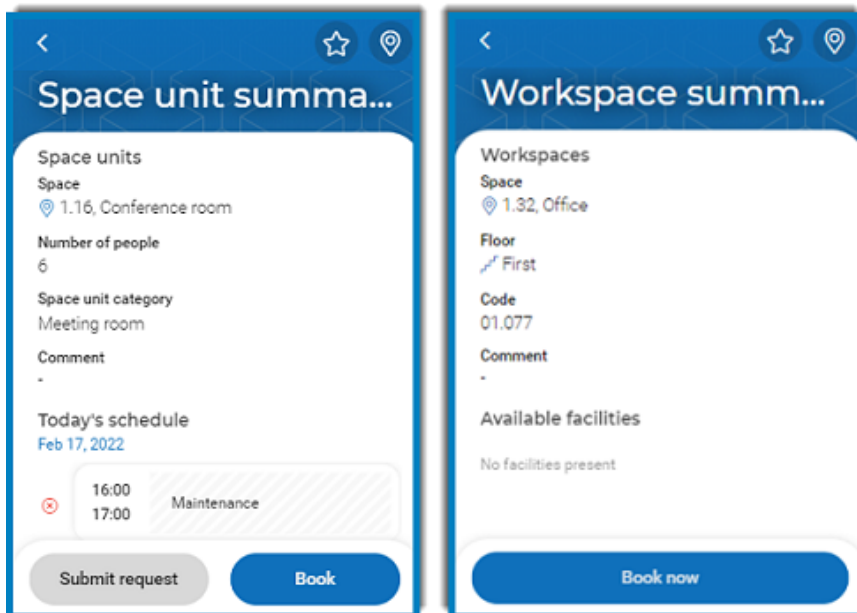1. Tap the Book a room or Book a desk icon.

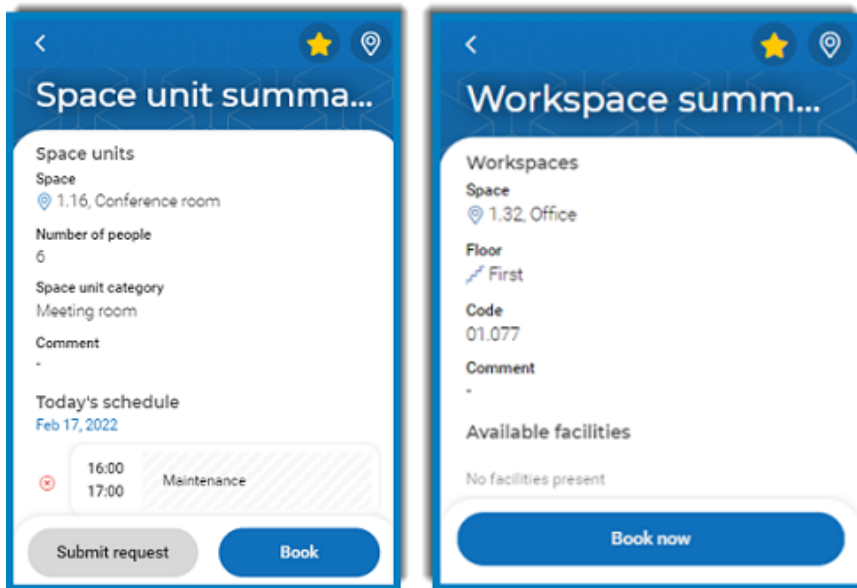   **A list of meeting rooms / desks is displayed.**
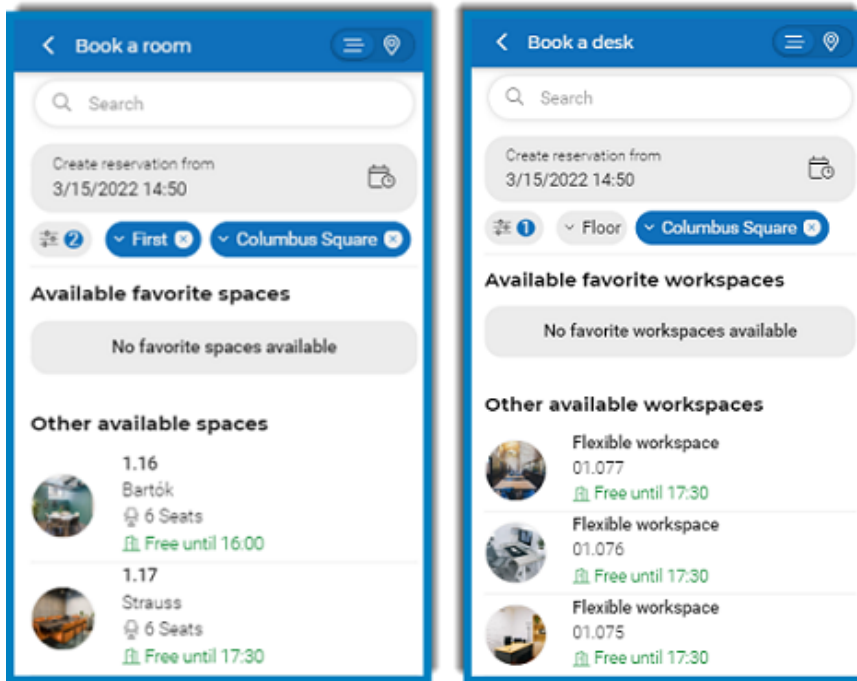
2. Select a meeting room / desk.

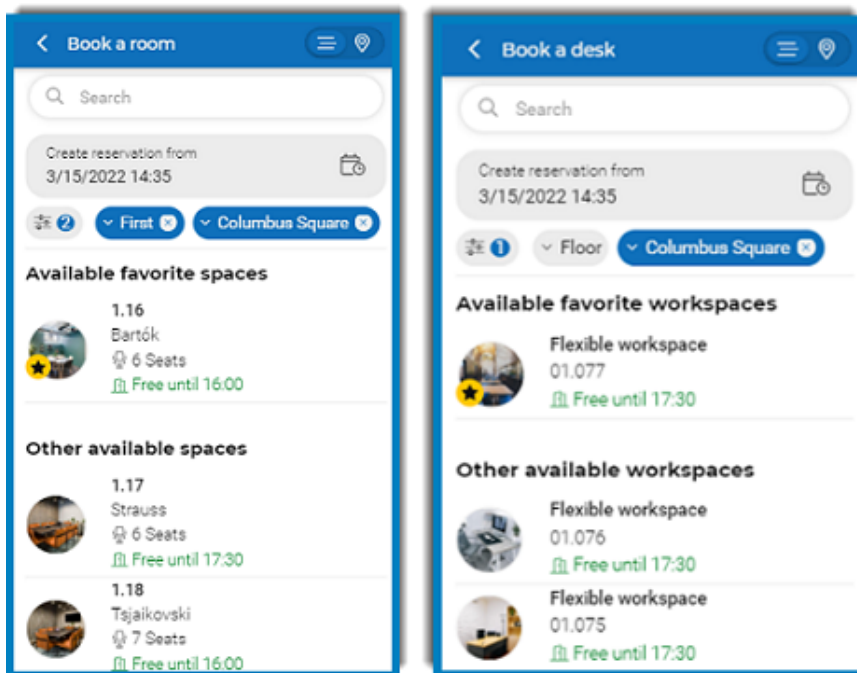ℹ️ Use the search bar by entering (part of) the code or name.

A summary page is displayed.

3. Tap the Star icon at the top-right corner of your screen.

The meeting room / desk is marked as favorite and listed on the Available favorite rooms / Available favorite desks tab.

ℹ️ If a favorite meeting room / desk is not available for booking it is not shown on this tab.

4. To remove a meeting room / desk from the list of favorites, click the Star icon at the top-right corner of your screen.

The meeting room / desk is removed from the Available favorite rooms / Available favorite desks tab.

Bookings

Module in the Planon Workplace app that enables you to book meeting rooms, flexible workspaces or corporate assets.

The **Bookings** module is designed to support activities that involve booking / making reservations.

> The **Bookings** module can be installed as a replacement of the original Reservations module in the Planon Planon Workplace app . The two modules are very similar in functionality, but the **Bookings** module is less complex and has an improved user flow and visuals.

Booking start page

The **Bookings** module is easy to navigate and use.

The **Start** page welcomes you and shows your upcoming reservations for the day, as well as the recommended and extra booking options:
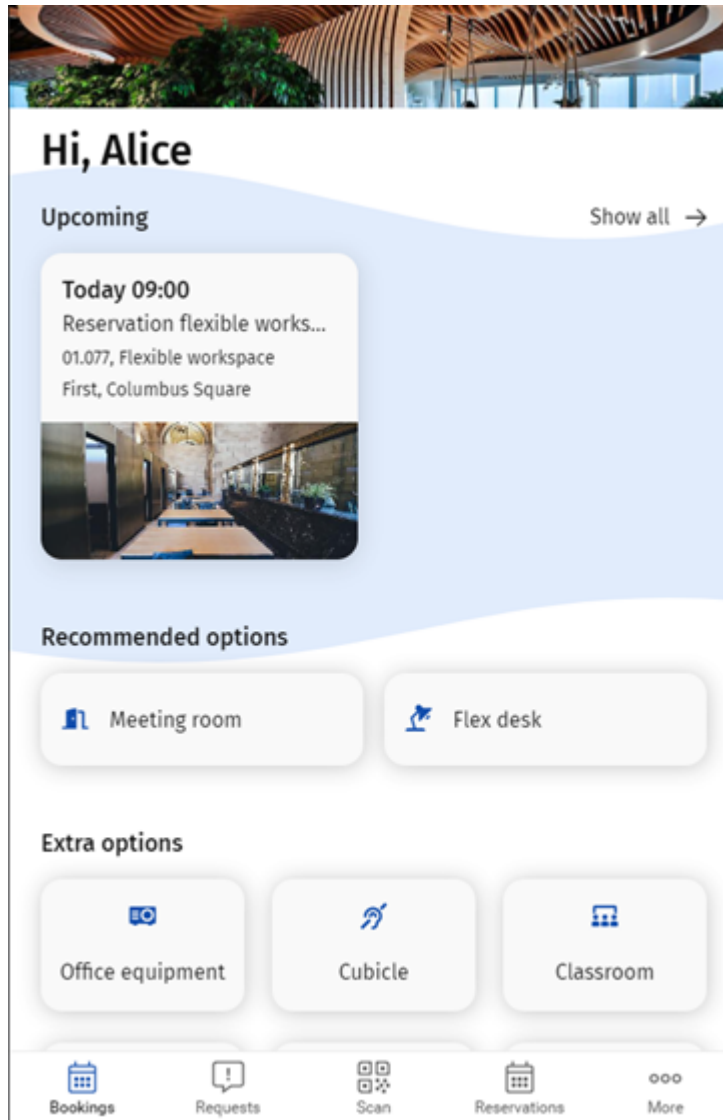
At the top right, you can also select a **Show all** view that displays all your pending reservations, both current and in the future.

Depending on your app configuration , you may be able to access additional booking options on your start page. Such additions might for example include booking of a *Classroom*, *Office equipment*, *Cubicle* and so on.

Adding a booking

When you select the **Bookings** module in the Planon app, you will first be taken to the **Start** page. The **Upcoming** bookings and **Recommended options** are shown prominently. The **Extra** booking options, if available, are at the bottom of the page.

> ℹ️ The procedure for booking is virtually identical for all booking options.

Use the following procedure to book a meeting room, flex desk or any other booking option,like, for example, office equipment.

Procedure

1. On the **Start** page, select a recommended booking option or an extra booking option, for example: **Meeting room** or **Flex desk**.

   The Book rooms / Book flex desk page is displayed.

2. If you are booking a meeting room, enter a description for your booking in the **Title** field.

3. In the **Where** field, select the location for your meeting / flex desk (building and floor).

4. Select a time slot in the **When** field.

5. If you are booking a meeting room, select the number of people that will be present in the **How many people?** section.

6. Select **Show results**.

   The Results page is displayed, with all available options for the selected time and location. If you 'favorite' one or more booking options, these can be easily identified in the list by a star icon. For quick and easy reference, favorite options are always shown at the top of the list.

- For searching reservation units by facilities, see Searching for reservation units by facilities.

- If you leave the results page idle for longer than 5 minutes without actually booking, you must start over.
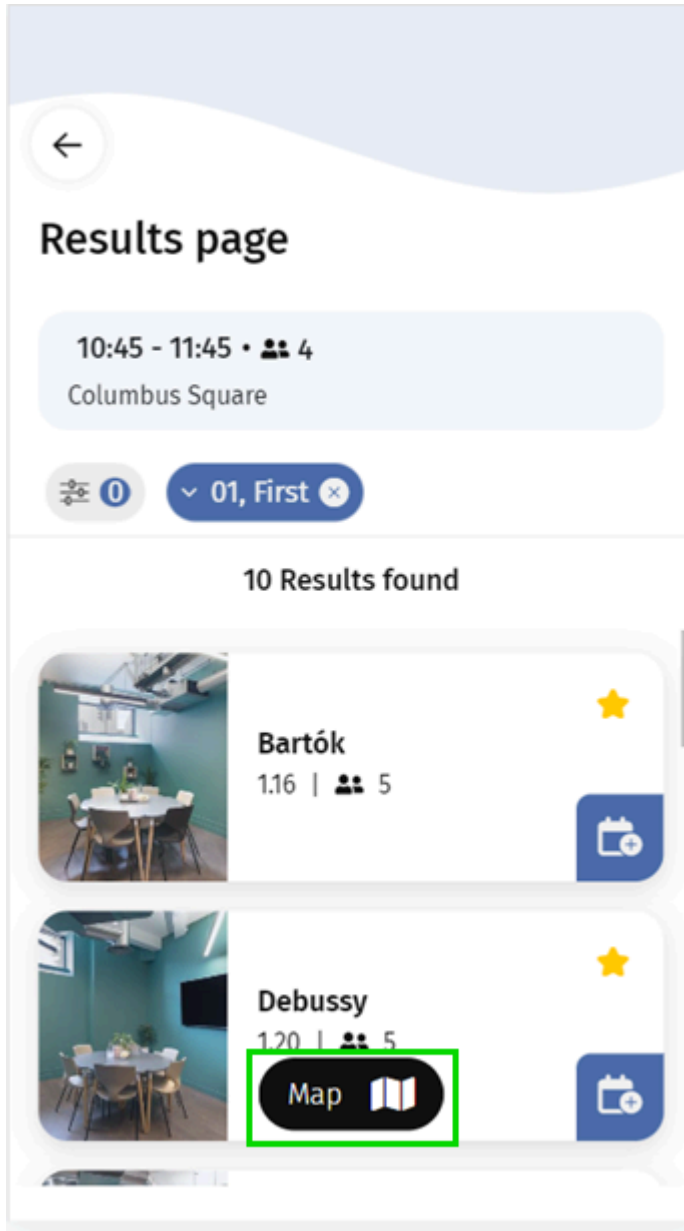
> ℹ️ If you set the **Floor** filter to **All floors**, you can access a floor selector via the **Map** icon, in list view. You can subsequently select the relevant floor and go to the selected floor plan.

7. Now, you can immediately book by selecting the **Book now** button on the item of your choice:

8. Or … you can view the **Details** of the room / flex desk, by selecting the relevant block.

Details about the selected room / flex desk are displayed, including information about facilities and any pending requests for this room.

Debussy

ⓘ 1.20 | 👥 5

🏢 01, First, Columbus Square

Availability

There are no reservations

Facilities

    Airconditioning

▣ Beamer

    ClickShare

    Conference cam

9. If you decide to mark the room / desk as a favorite, select this icon at the top right of the page:
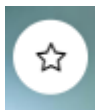
10. To view location details before booking, select the **Location** block on the **Details** page and open the floor plan.

Location

Requests

There are no requests pending

Create new request

> ℹ️ You can click the **Create new request** button to add a new request for the selected room / flex desk. See Creating a request.

11. Click **Continue**.

A **Finalize booking** page is displayed.

12. Edit the fields as required and click **Book** to finalize your booking.

> ℹ️ To make a reservation via QR code, see Making a reservation by scanning a QR code.

You get confirmation that the booking was successful.

Your reservation is created

Today 22 Dec

Starts at	Ends at
09:35	**10:30**

1.20, Debussy

Reservation Team meeting Alice Jones

First

Columbus Square
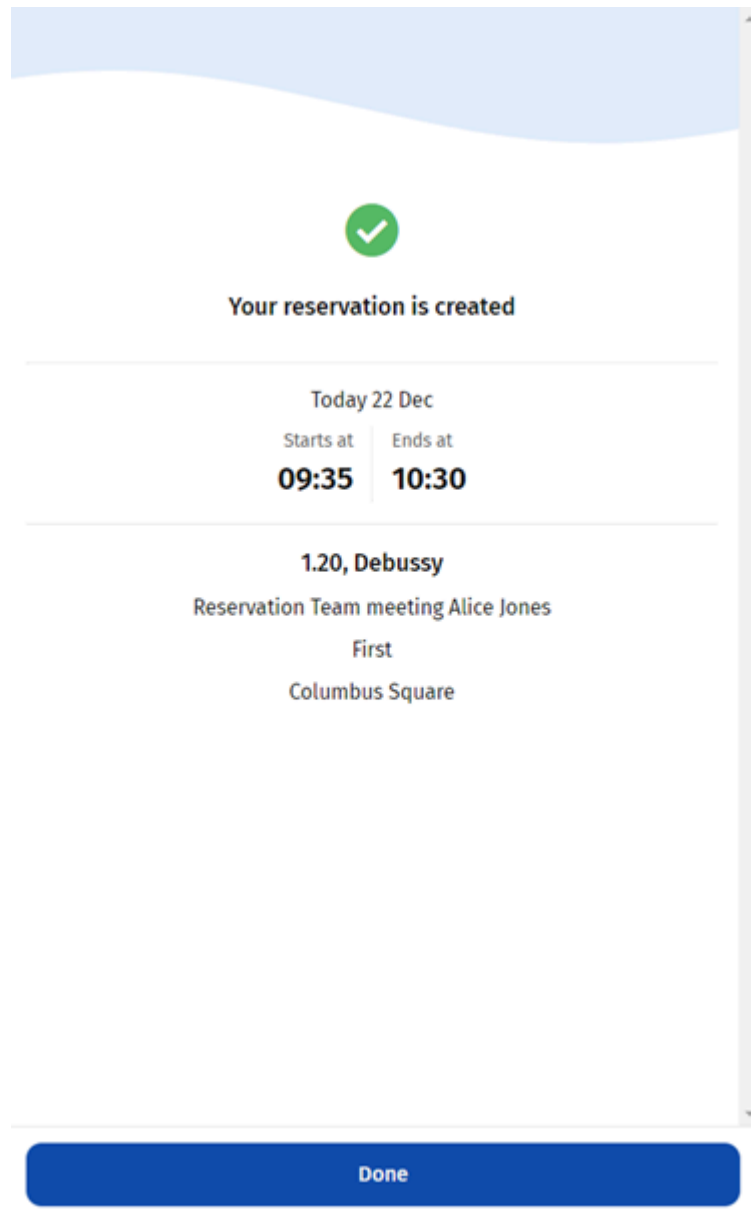
Done

13. Select **Done**.
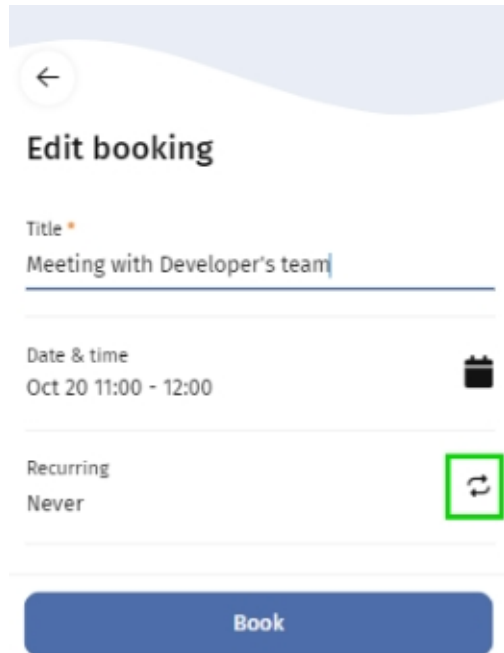
You are redirected to the Start page. If you booked for the current date, your new reservation is shown in the Upcoming section on the start page. If you booked for a future date, you can find your new reservation under All reservations.

Creating a recurrent booking

You can have a booking recur periodically, such as daily, weekly, monthly or on specified dates. This will result in a scheduled series of bookings for the selected interval.

1. On the **Reservation unit details** page, click the **Edit** button.

   You will be directed to the Edit booking page.

> ℹ️ The **Title** field is pre-filled with the reservation unit's **Standard order** description.

2. Enter the number of people in the **Number of people** field for whom a space unit is booked. For more information about configuring **Number of people** field, see Adding 'Number of people' field to the 'Edit Booking' page.

3. To make a recurrent booking, click the icon with the 'make recurring' symbol.
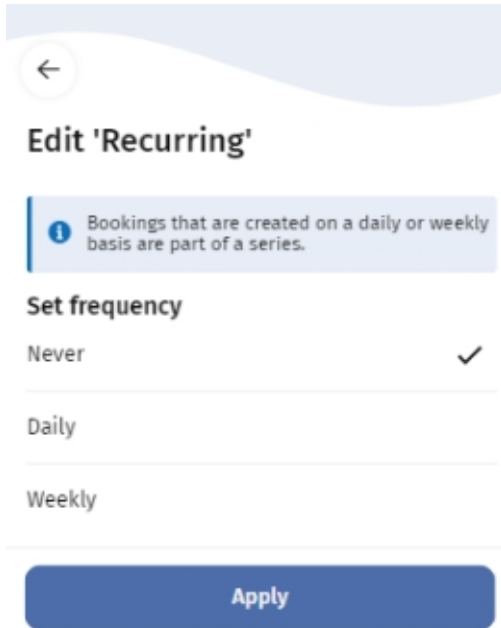
The **Edit 'Recurring'** page is displayed.

4. Select the frequency: **Daily** or **Weekly**.
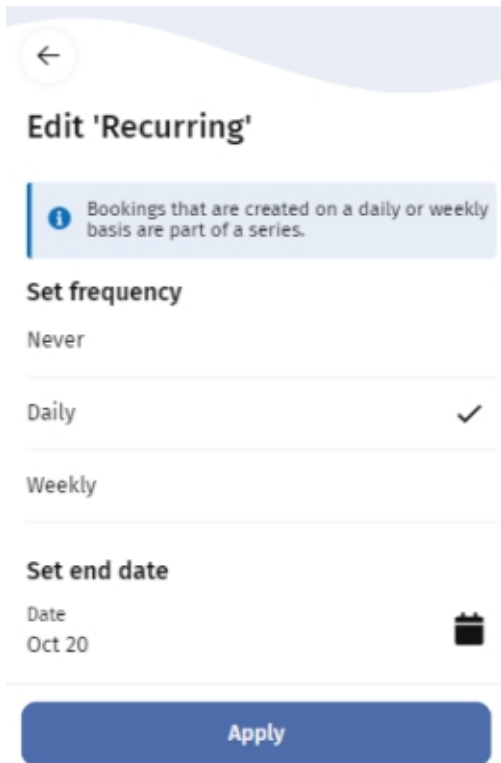
The **Set end date** field appears.

Creating a recurrent booking

5. Click the calendar symbol on the **Set end date** field and select the end
    date on the calender displayed.
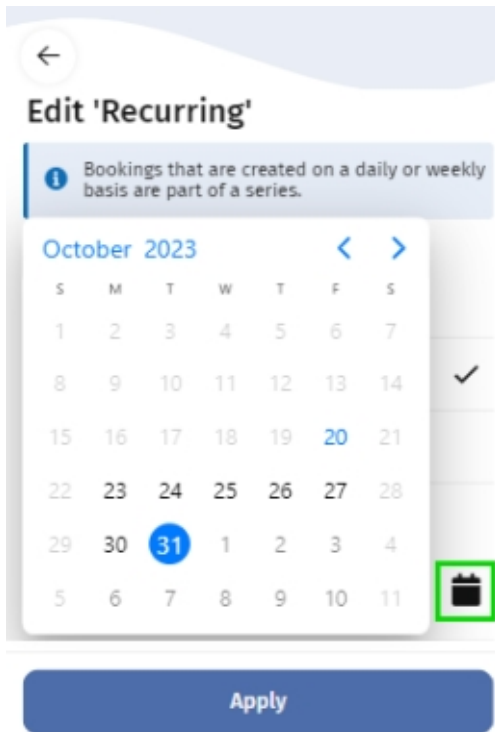
ℹ The number of days shown here depends on your configuration. For more information, see
   Adding a sub to a Bookings web definition.

6. Click **Apply**.

    The Edit booking page is displayed with your preferences for the booking.
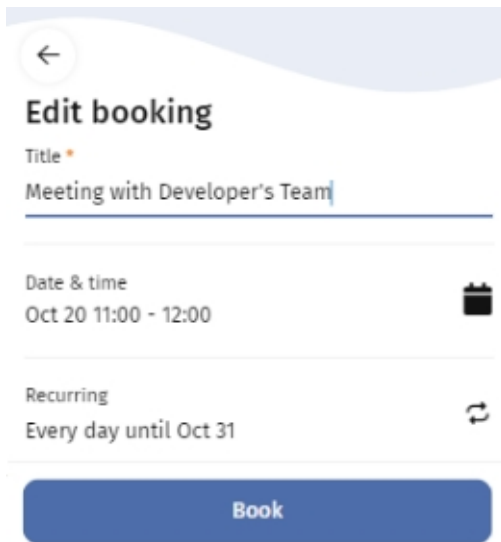
7. Check whether the mandatory fields are updated and click **Book**.
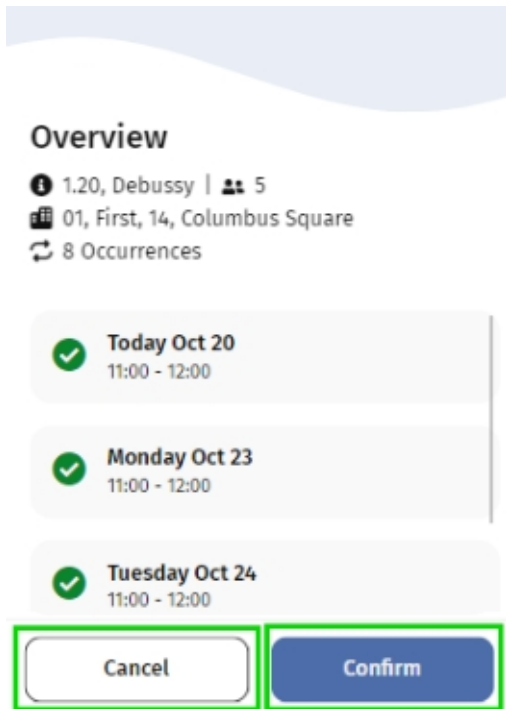
The **Overview** page is displayed, showing the new recurring bookings and their details.

8. Click **Confirm** to finalize the booking or **Cancel** to abort.
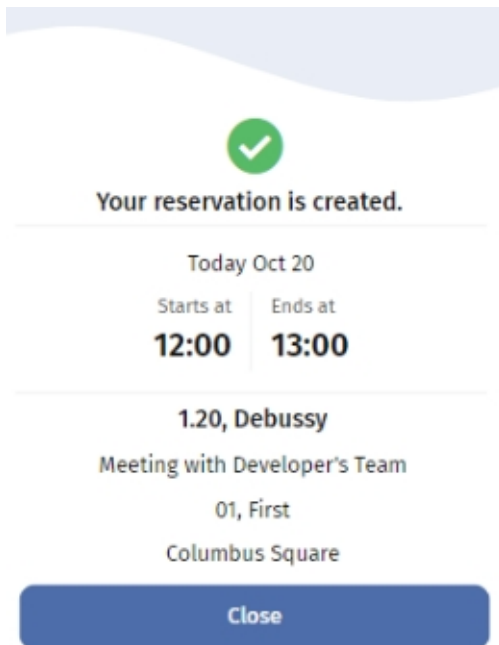
A confirmation is displayed that the booking was successful.

9. Select **Close**.

You are redirected to the **Start page**. If your recurring bookings include a booking for the current date, it is shown in the **Upcoming section**.

> ℹ Click **Show all**, to display all your future occurrences and bookings on the **All reservations** page.
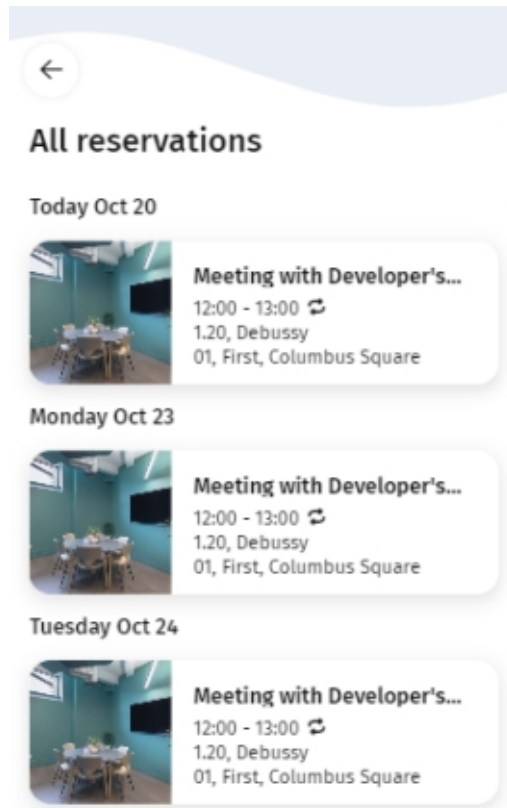
Searching for reservation units by facilities

In the Planon Live app, you can filter the reservation units based on their facilities, allowing you to quickly find the reservation units that meet your requirements.

Procedure

1. On the **Bookings** module start page, create a new reservation for a meeting room or a similar reservation unit.

2. On the **Book […]** page fill in the search criteria as required and select **Show results**.

3. On the **Results page**, click ⚙ ⓪ the filter button.

   The Filters page is displayed.
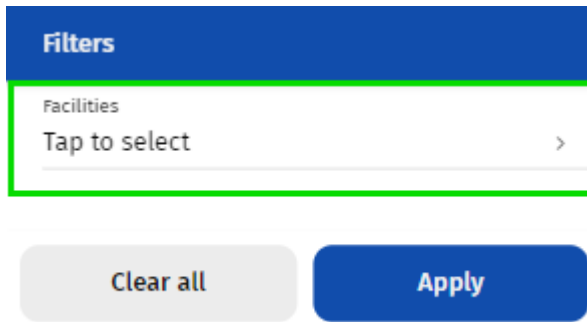
4. Tap the **Facilities** option.

   The Facilities list page is displayed.
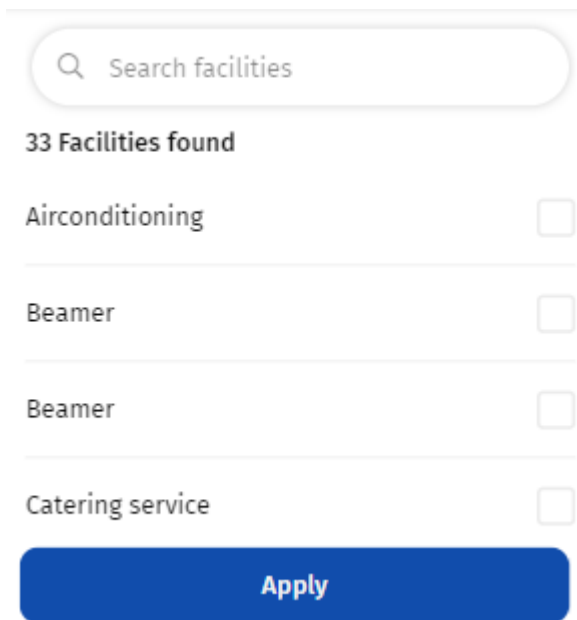
5. Select the required facilities and click **Apply**.

   The Filters page is displayed along with the selected facilities in the Facilities option.

The **Search** field allows you to search for facilities by typing (part of) the name in the field.

6. Click **Apply**.

The reservation units with the selected facilities are now displayed.
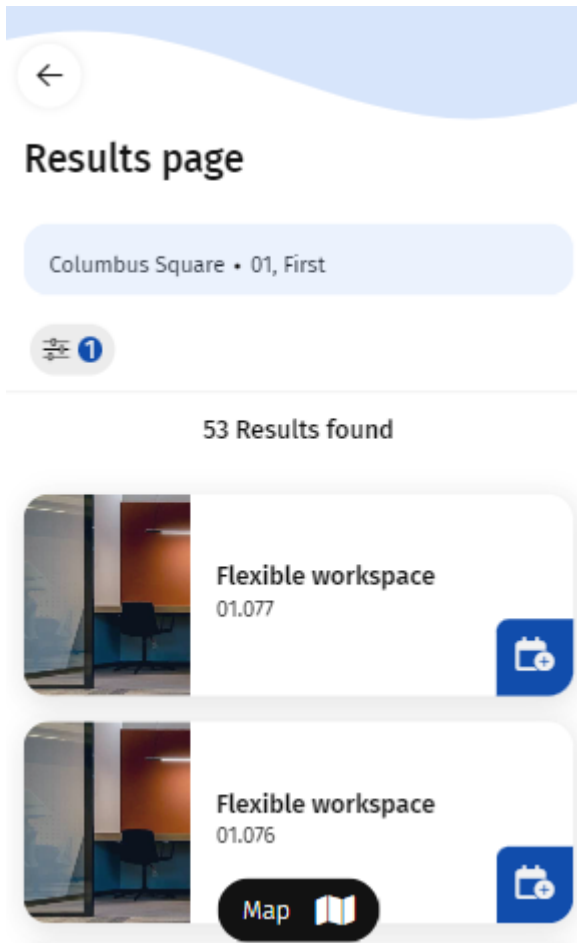
7. Select a reservation unit and select **Book**.

Making a reservation by scanning a QR code

You can book a meeting room or flexible workplace on the spot by scanning the QR code that is available at the room or desk.

Procedure

1. On site, scan the QR code of the meeting room or flexible workspace that you want to book.

   The reservation unit's details are displayed.

2. To select date and time slot, click Adjust booking link at the bottom of the page.

   The Adjust booking page is displayed.
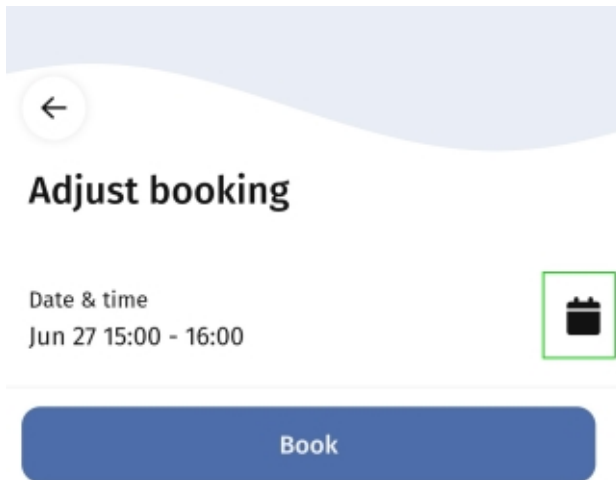
3. Select a date and time and click Save.

You are redirected to the reservation unit details, with an updated date and time.

4. Click **Book** to finalize the reservation.

You get a confirmation that the reservation is created.
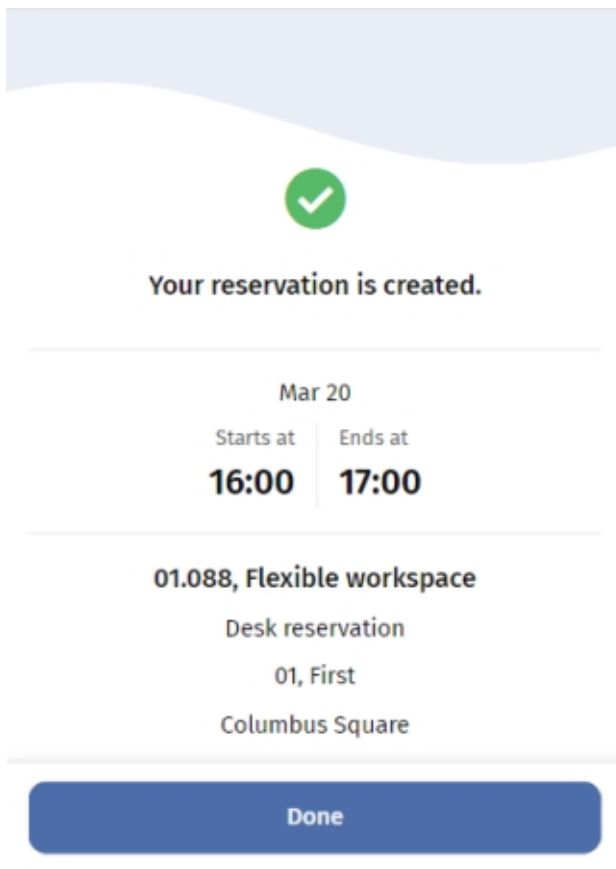
If you make a reservation within 15 minutes from the start of the reservation, you get a confirmation that the reservation is created and you are automatically checked in.
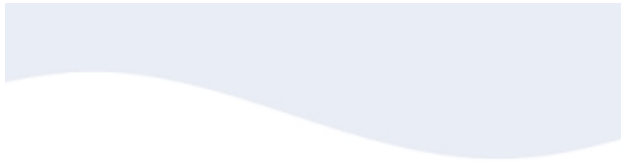
Your reservation is created and you are checked-in

Today Mar 20

Starts at	Ends at
15:00	**16:00**

01.088, Flexible workspace

QR booking Desk reservation

01, First

Columbus Square

Done

5. Select Done.

You are redirected to the Start page. Your new reservation is in the Upcoming section.
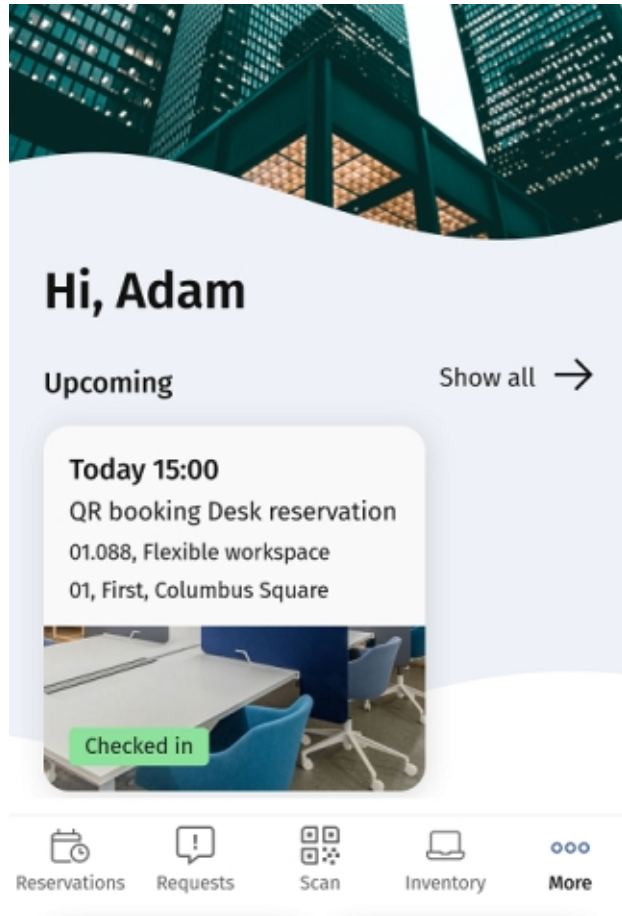
When you scan the QR code of a meeting room, or make a room reservation, a Microsoft Teams link will be added to the booking.

Reserving a desk near a colleague

In the **Bookings** module, you can reserve a desk near a colleague.

Prerequisite: Your application manager must allow this by setting the **Enable booking near colleague?** field to **Yes** in the Live app configuration. For more information, see Adding a sub to a Bookings web definition.

1. On the **Bookings** module start page, click the **Flex desk** button.
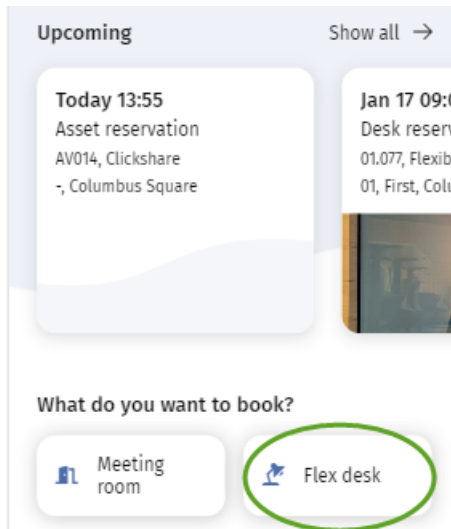
You will be directed to the Find colleague page.

2. Tap the calendar, select the date you want to book a flex desk and tap
   Set.

ℹ By default, the property filter shows your location, and the available options filter displays **All colleagues**. You can adjust both filters to your preferences. For example by selecting the **Show favorites** option for colleagues. To mark colleague as favorite, see Marking a colleague as favorite.

3. Find your colleague by browsing the list or by typing their first name or surname into the **Find colleagues** search bar.

4. Select the colleague near whom you want to reserve a desk.

The Bookings by colleague overlay is shown.

ℹ If the colleague has no reservation on the selected date, they cannot be selected. The colleague's status is shown as **Not in the office**. Additionally, if the colleague's privacy setting is set to hidden, you will see the text **Location hidden**'.

5. Select the colleague's booking.

   The Results page opens.

6. Tap on the **Map** icon at the bottom of the page to see your colleague's desk location on the map.

   A floor plan is displayed, highlighting (in amber) the location of your colleague's desk. The location is automatically zoomed in, making the location on the floorplan more clearly visible.

7. Select an available desk (marked green) near your colleague.

   A flexible workspace pop-up is shown.

8. Select the pop-up and tap **Book** to book the selected desk.
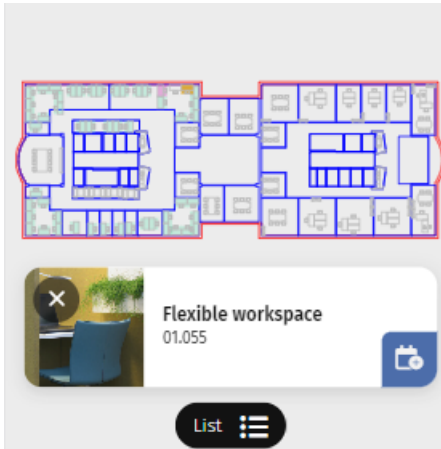
A confirmation page is shown with your reservation details.

9. Tap **Close**.

   **You are redirected to the Start page. Your new reservation is displayed in the Upcoming section.**

Editing a booking

You can update the details of an existing booking. The editing option is available for all types of bookings.

1. On the start page, select the booking you want to edit.
2. On the **Book […]** page select the **Edit** button.
3. On the **Edit […]** page, make the necessary edits.
4. Select **Update**.

   You get confirmation that the update was successful.

5. Select **Done**.

Editing a recurrent booking

You can update the details of an existing recurring booking. The editing option is available for all booking types.

1. On the **All reservations** page, select the reservation you want to edit.

   The **Reservation details** page is displayed.
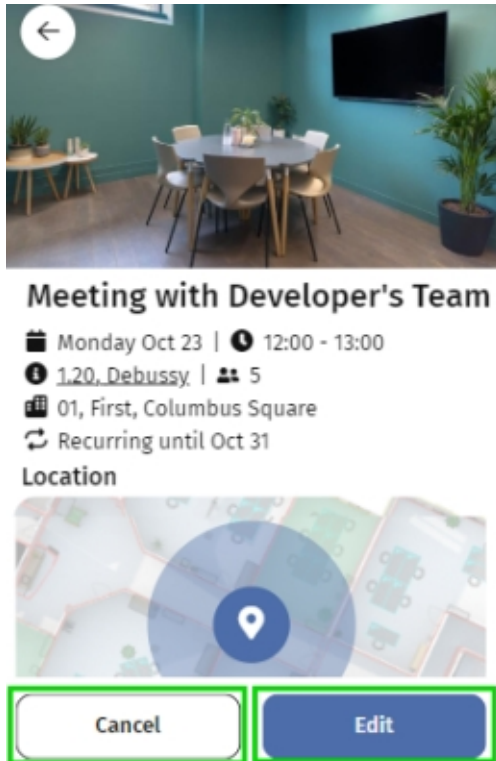
2. Click **Edit**.

The **Edit reservation** page is displayed.
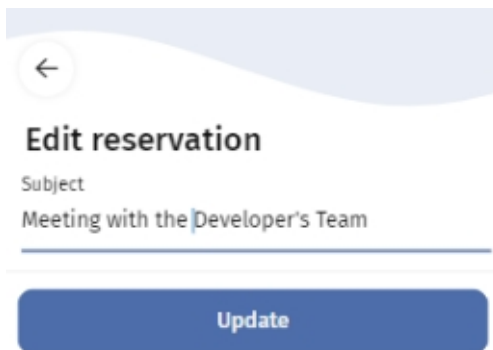
3. Edit the fields as required and click **Update**.

> ℹ️ If you edit the last booking in the series, no pop-up is displayed and you get direct confirmation that the booking is updated.

A confirmation is displayed.

4. Click **Yes** to apply the changes to future reservations for this recurrence, or click **No** to cancel.

   **You get confirmation that the bookings are updated.**

5. Click **Close**.

   You are redirected to the Start page. You can find all your updated reservations under All reservations page.

Canceling a recurrent booking

You can cancel an existing recurring booking. The canceling option is available for all booking types.

1. On the **All reservations** page, select the reservation you want to cancel.

   The **Reservation details** page is displayed.
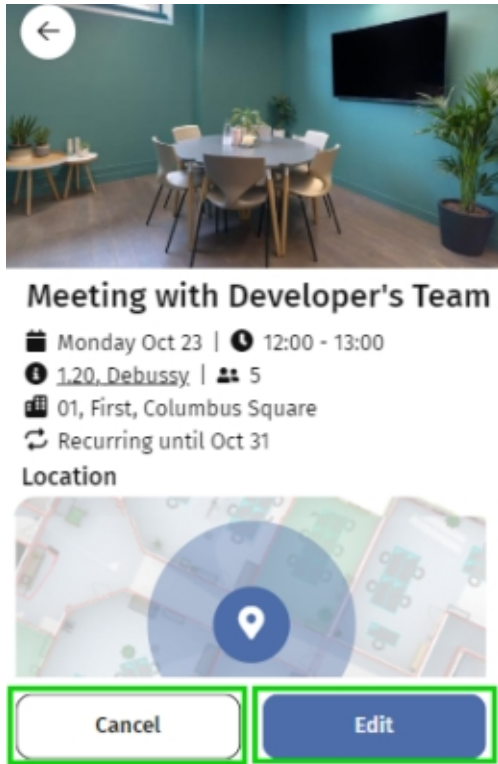
2. Click **Cancel**.

   A **Confirmation** is displayed.
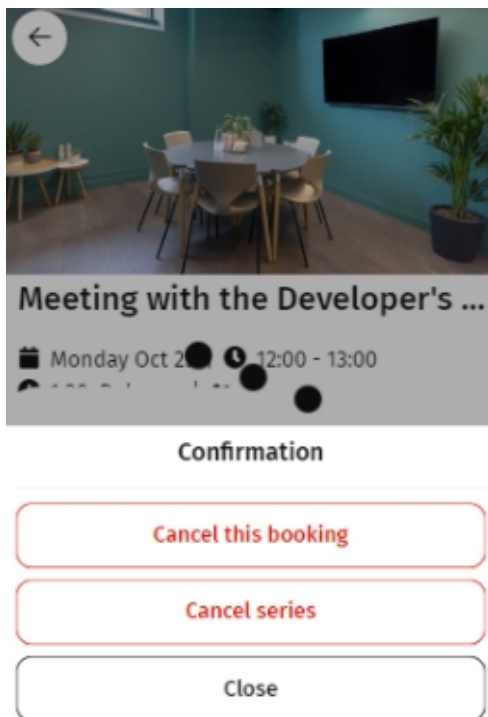
3. Click **Cancel this booking** to cancel the selected booking or click **Cancel series** to cancel the entire booking series, or click **Close** to abort the operation.

   A Cancel booking pop-up is displayed.

4. Click **Yes** to cancel or click **No** to abort the operation.

   You are redirected to the All reservations page and you get a confirmation that the booking(s) is/are canceled.

Checking in

By checking in, you confirm your presence at the booked meeting room or workspace. If you already have created a booking via your mobile app, Planon Self-Service or Outlook, just follow step 1 to check in. To make an instant reservation upon arrival and also check in, see steps 2 and 3.

Procedure

1. When you arrive at the room / workspace, check in by scanning its QR code.

Check-ins are possible from 15 minutes before the start of the reservation, but also if a reservation has already started.

2. To make an *instant reservation* upon arrival at a meeting room / flexible workspace and check in immediately, scan the QR code.

3. Next, click Book (for a meeting room) or Claim (for a flexible workspace).
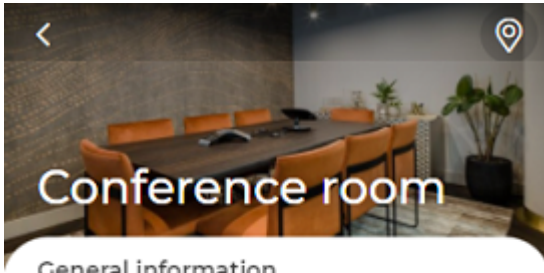
   If QR code scanning is not used for checking in, app users can claim / book a workspace / room by tapping the button.

Spaces

A module in the Planon Workplace app that enables you to view spaces in the building.

The **Spaces** module is designed to view the list of available spaces in the building. The **Search field** allows you to search for spaces by entering a code or name of a space in the field.
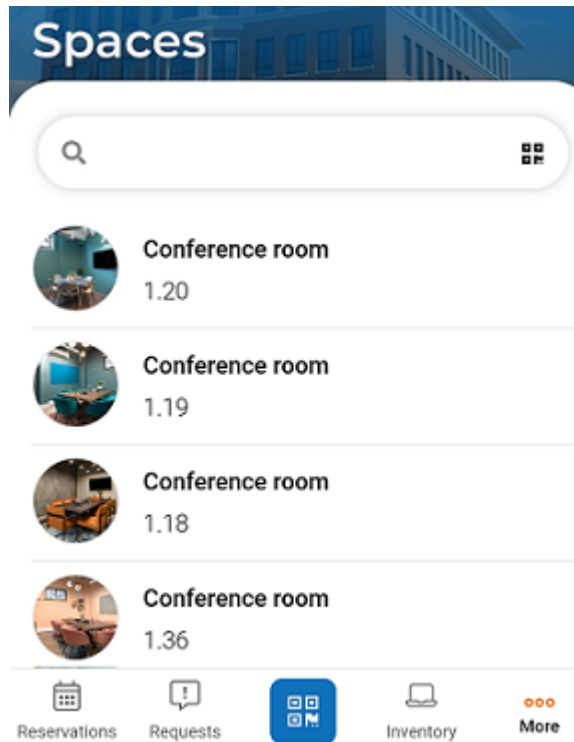
If you tap a space you will see the details of the room. If any request is submitted for the space you can see them below the **Reported incidents**. You can also submit a new requests, see: .

Conference room

General information

Space number
1.17

Floor
First

Property
Columbus Square

Reported incidents

Description	Status
Cleaning request	Reported *

Request

External links

A module in the Planon Workplace app that displays links giving access to relevant (corporate) websites.

The **External links** module is designed to enable you click on a URL to navigate to your default browser. The link redirects you out of the app. The app does not support anything that happens after opening the link such as login, password change and other similar things.
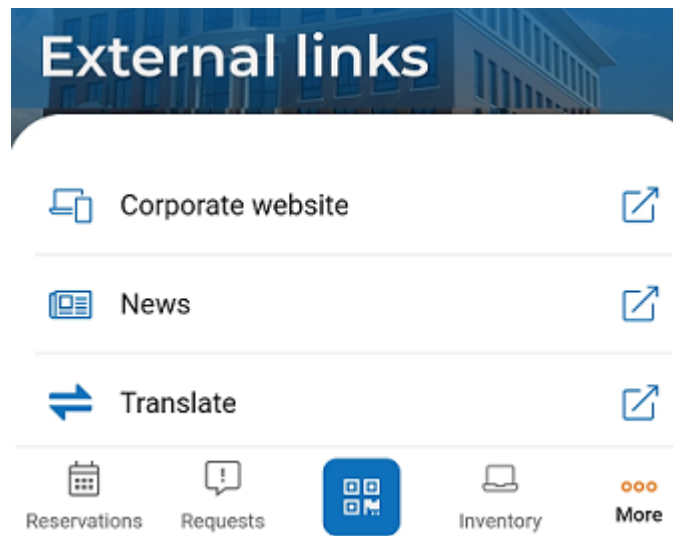
> ℹ The application manager needs to validate with system administrator that the URL entered is safe and does not lead to a malicious site. For more information, see Security.

Visitors

Visitors are individuals who are not regular employees of the organization, but who come to a company / organization with a specific purpose, for example to meet with people who are employed there.

The Planon Workplace app includes a **Visitors** module that enables you to register your visitors and to view already scheduled visitors.

The **Start** page shows your future visitors. You can register new visitors by using the **New visitor** button. See Adding a visitor. For information on canceling a visitor's registration or editing visitor data, see Canceling a registered visitor and Editing visitor data.

You can view the visitor's details by clicking on the visitor's block.

Adding a visitor

On the Planon Workplace app , you can register your visitor(s).

P r o c e d u r e

1. In the **Visitors** module, tap New visitor at the bottom of your screen.

Visitors list

Thursday, 18 May
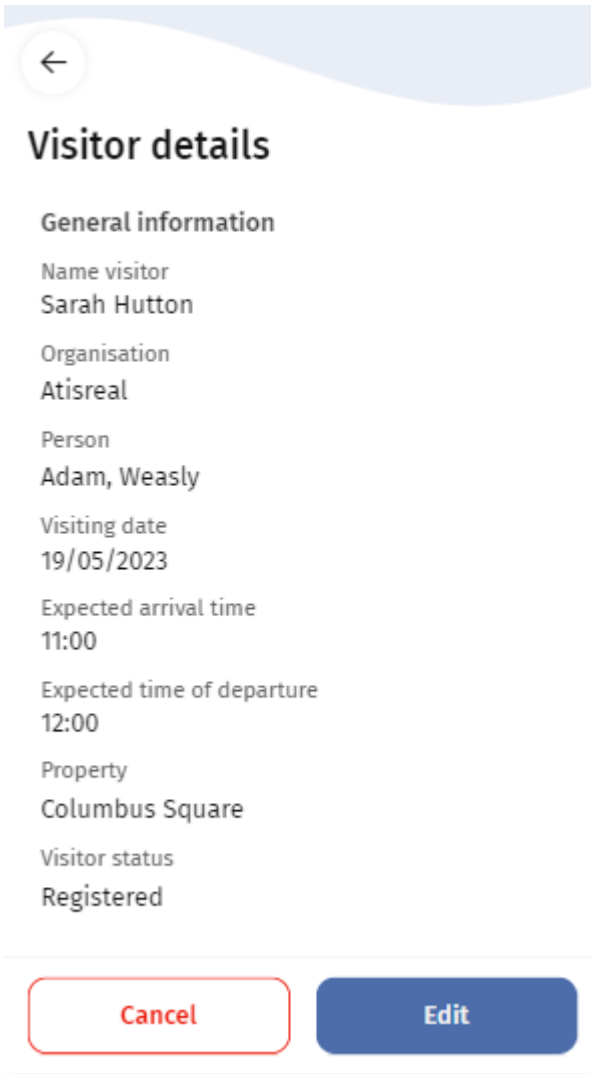
Allan Randall
16:00 - 17:00
1, Registered

Alice Cook
17:00 - 17:30
1, Registered

New visitor

| Booking | Reservatio... | Scan | Visitors | More |

The **New visitor** page is displayed.

2. Enter the visitor's name in the Name visitor field.

> ℹ️ The **Person**, **Visiting date** and **Property** fields are automatically filled in accordance with your settings in the Planon Workplace app . For more information about settings, see Generic features and settings. You can edit the **Visiting date** and the **Property** fields as required.

3. Select the visitor's arrival and departure times in the Expected arrival time and Expected time of departure fields.

4. Click Register.

   You are redirected to the Start page and you get a confirmation that the Visitor registered. Your new visitor is shown in the Visitors list.

Editing visitor data

On the Planon Workplace app , you can update a registered visitor's details.

Procedure

1. On the **Start** page, select the visitor whose details you want to edit.

The **Visitor details** page is displayed.

2. Click Edit.

3. On the **Edit visitor** page, update the fields as required.

4. Click Update.

   You are redirected to the Start page and you get confirmation that the details are updated. The selected visitor's details are updated and shown in the Visitors list.

Canceling a registered visitor

On the Planon Workplace app , you can cancel a registered visitor.

Procedure

1. On the **Start** page, select the visitor whose registration you want to cancel.

Visitors list

Thursday, 18 May

Allan Randall
16:00 - 17:00
1, Registered

Friday, 19 May

Sarah Hutton
11:00 - 12:00
1, Registered

New visitor

Booking | Reservatio... | Scan | Visitors | More

The Visitor details page is displayed.

Visitor details

General information

Name visitor
Sarah Hutton

Organisation
Atisreal

Person
Adam, Weasly

Visiting date
19/05/2023

Expected arrival time
11:00

Expected time of departure
12:00

Property
Columbus Square

Visitor status
Registered

[Cancel]   [Edit]

2. Click Cancel.

3. In the **Cancel visitor** pop-up, click **Yes** to continue and/or **No** to abort.

   If you cancel, you are redirected to the Start page and you get a confirmation of the cancellation. The visitor is removed from the Visitors list.

Index

A