Planon app - Workplace solution

Planon Software Suite
Version: L111

Planon

Building Connections

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 Workplace solution

The Workplace solution can be used in the **Planon** app. The Planon app is the 'shell' application that you download from the relevant app store. It can hold various modules, for example those included in the licensed Workplace solution .

With the Workplace solution , 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 solution includes the following ready-to-use modules that will serve this purpose:

- **Colleagues**
- **Bookings** (replacement for the **Reservations** module; existing customers are advised to migrate to the **Bookings** module because of its improved user experience)
- **My inventory**
- **Requests**
- **Spaces**
- **Reservations** (predecessor of **Bookings** module)
- **External links**

The availability of these app modules is license-dependent.

See also Downloading and logging in.

Downloading and logging in

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

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

> ℹ️ If you are migrating from the older **Planon Live app** to the **Planon app**, the app functionality 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** 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.

Login

Enter the company URL manually or use the scanner to scan a QR-code containing the URL

Company URL

https://|

Login

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 Workplace solution 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 app includes several generic features: **Edit profile**, **Scan** and **Settings**.
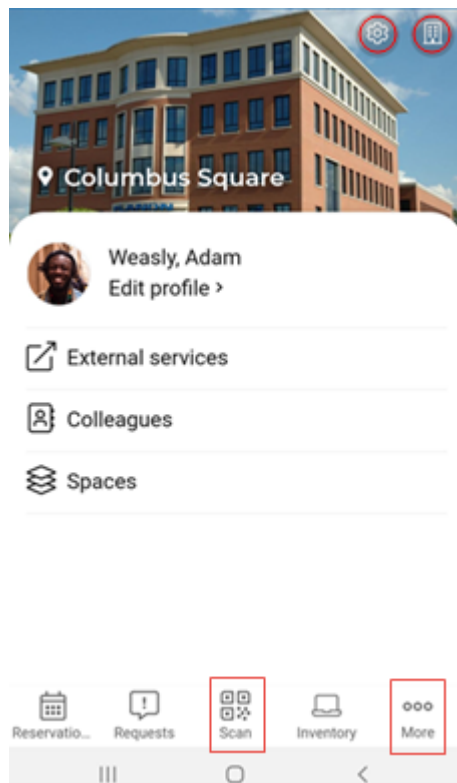
Edit profile

If you select the **More** (°°° 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.

	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.
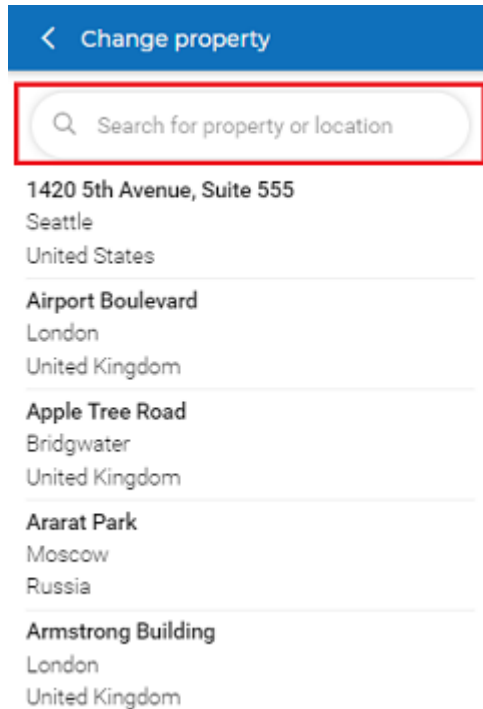
A list of properties is displayed, from which you can select the property. The search field allows you to search for the properties by entering a name of the property.

Settings

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

The options listed in the settings menu are:

- **Show preferences**:

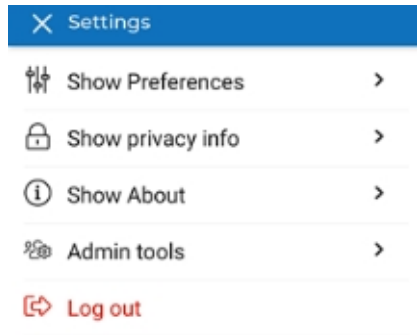 ◦ At **Display style**, select either **Tablet** or **Mobile**, to optimize the view for your type of mobile device.

  ◦ 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 app. They can write NFC tags for spaces, workspaces and assets. See also: Writing NFC tags for the Planon App.

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

> **i** • 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 app.
> • Because the modules of the Planon app are configurable, any examples given may deviate from what is displayed on your app. For more information on **App configuration**, see About Planon app - mobile configuration.

Specific features

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

Location display

In the Workplace solution , 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.
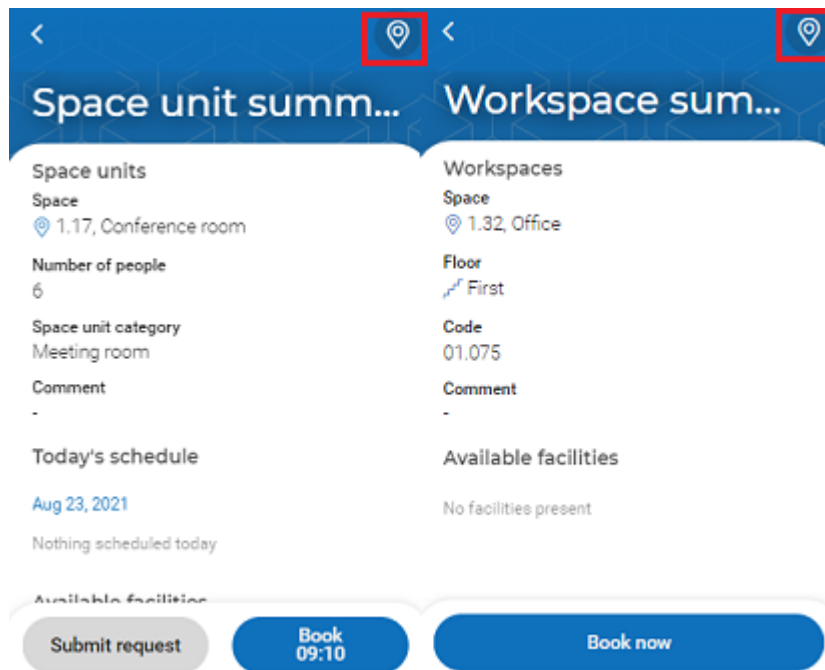
Notifications

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 Workplace solution 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 Workplace solution you must enable gestures settings on your phone. See this external link: Gesture navigation.

Writing NFC tags for the Planon 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 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 app, see Start page in the *Planon app - Mobile configuration* documentation.

> The Planon 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 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 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 App is installed.
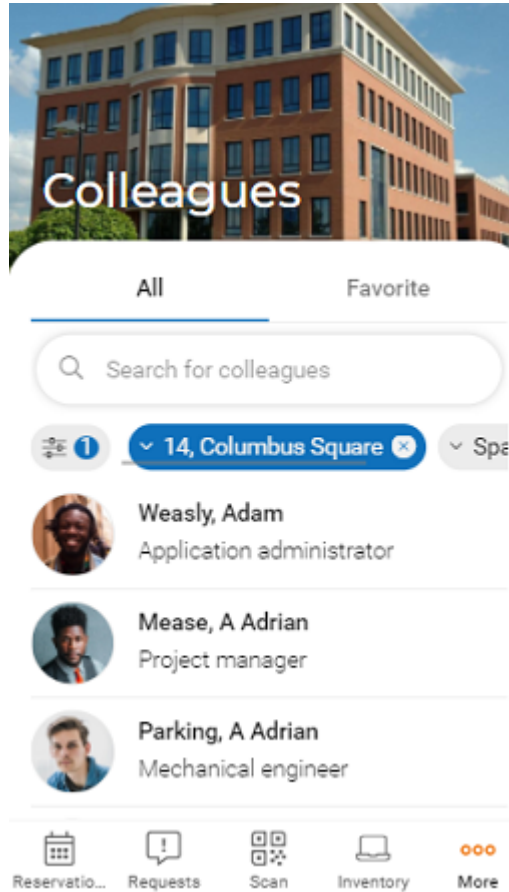
The Planon App should open automatically and navigate to the right record.
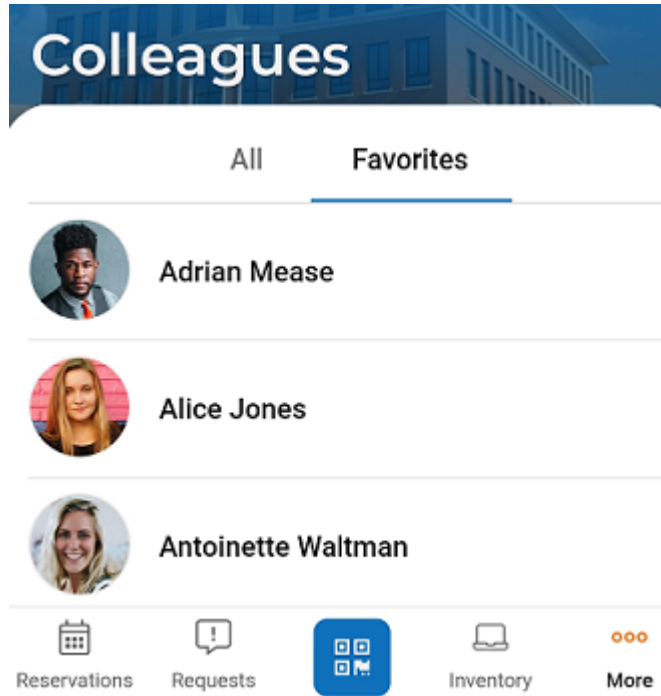
Colleagues

Module in the Workplace solution 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.
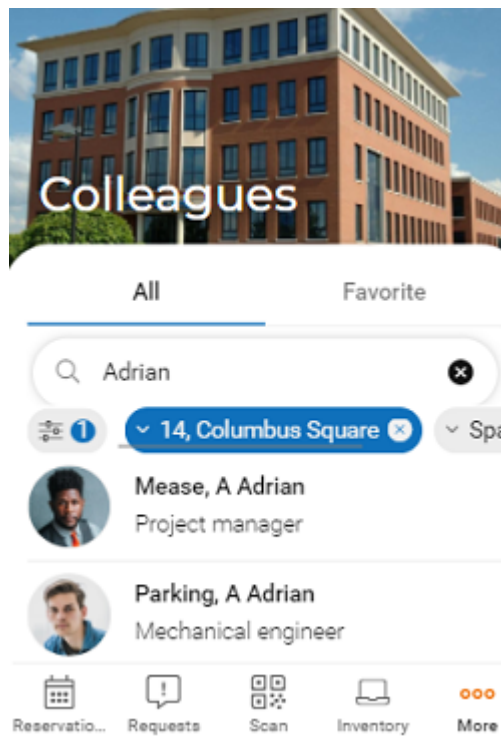
Select the person and view details such as phone number or current location:
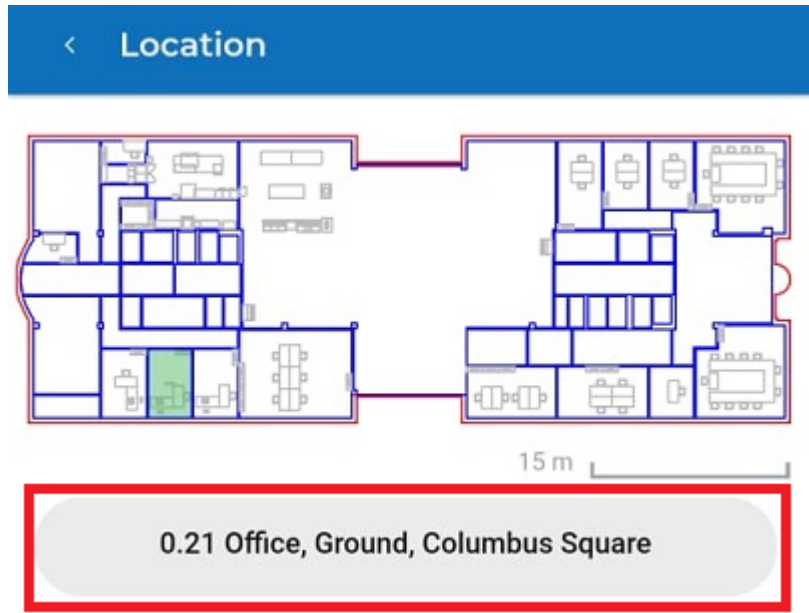
Click on **View map** to know the location of the colleague. The location of a colleague is shown in the CAD drawing as text (space, floor, property).

> ℹ️ 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:
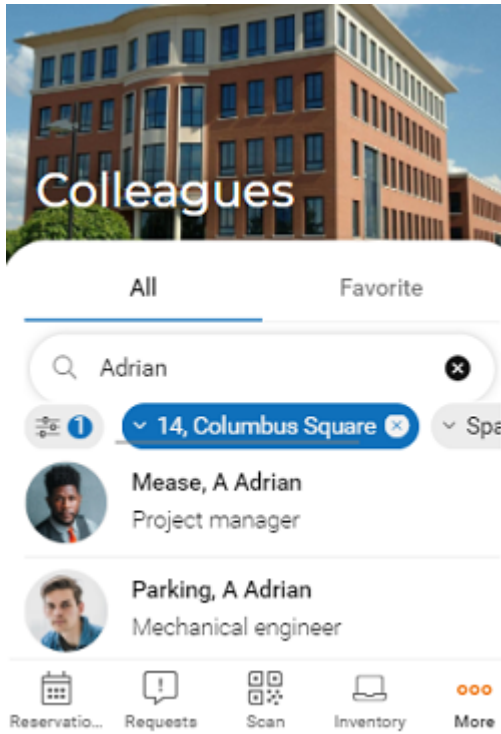>
> **Location**
>
> 🔒
> Location is private

Marking a colleague as favorite

In the Workplace solution , 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.
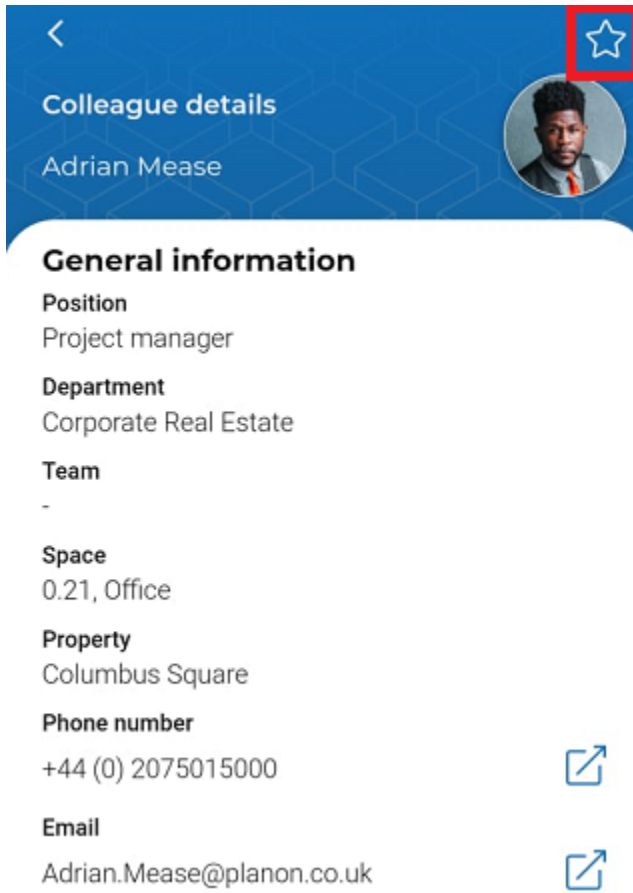
Procedure

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.

General information

Position
Project manager

Department
Corporate Real Estate

Team
-

Space
0.21, Office

Property
Columbus Square

Phone number
+44 (0) 2075015000

Email
Adrian.Mease@planon.co.uk

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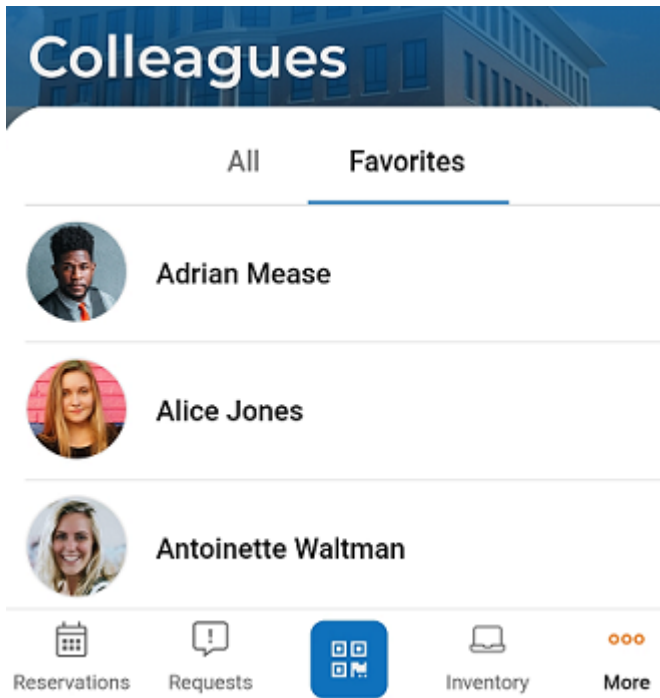
4. To remove a colleague from the list of favorites, click the Star icon at the top-right corner of your screen.

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

Finding a colleague's location

Using the Planon app, you can quickly find out where a colleague is currently working or meeting.

> ℹ️ Your colleagues may have blocked viewing their location via their privacy settings. In that case you cannot retrieve their current work location.

Procedure

1. In the Workplace solution , 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 Workplace solution can help you find information on a colleague's office attendance, by displaying their upcoming space or workspace reservations.

> ℹ️ Your colleagues may have blocked viewing their office attendance via their privacy settings. In that case you cannot retrieve this information.

Procedure

1. In the Workplace solution , 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:
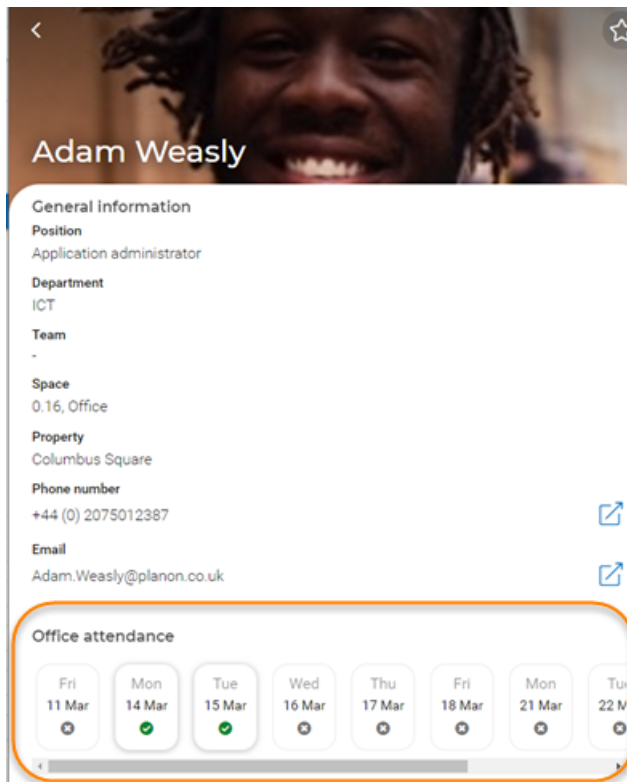
the green check-marked reservations represent the space or workspace reservations your colleague has made for the upcoming period.

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.

Bookings

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

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

> ℹ️ The **Bookings** module can be installed as a replacement of the original Reservations module in the Planon Workplace solution . 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:
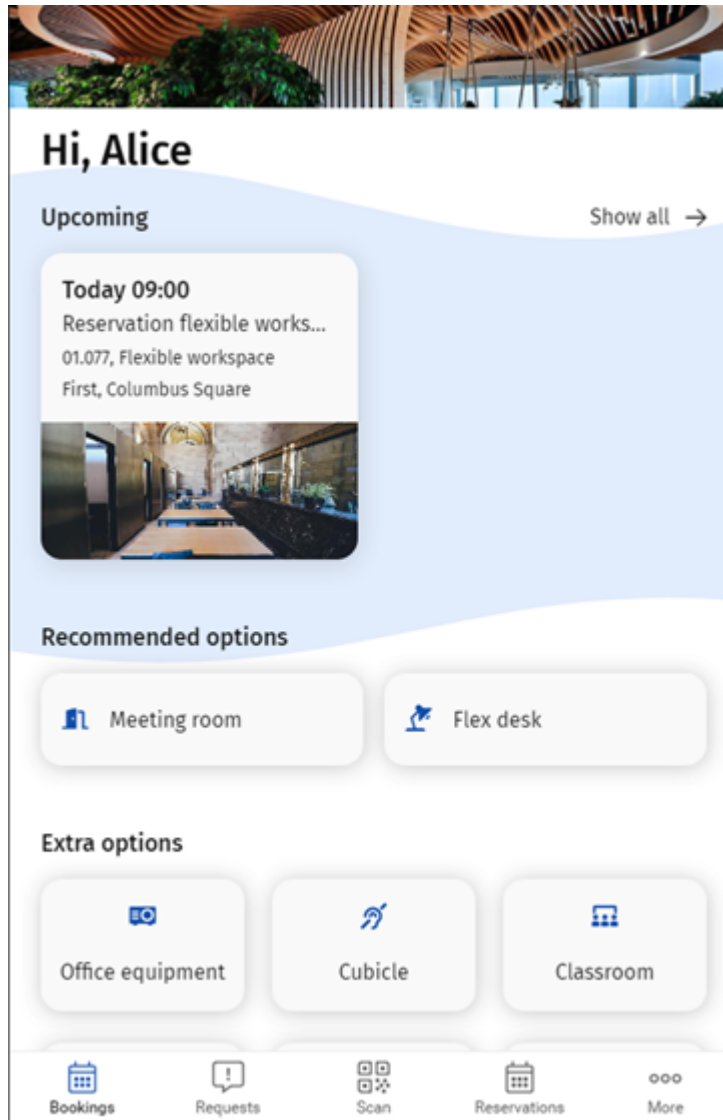
At the top right, you can also select a **Show all** view that displays all your pending reservations, both current and in the future.

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.

> ℹ 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.
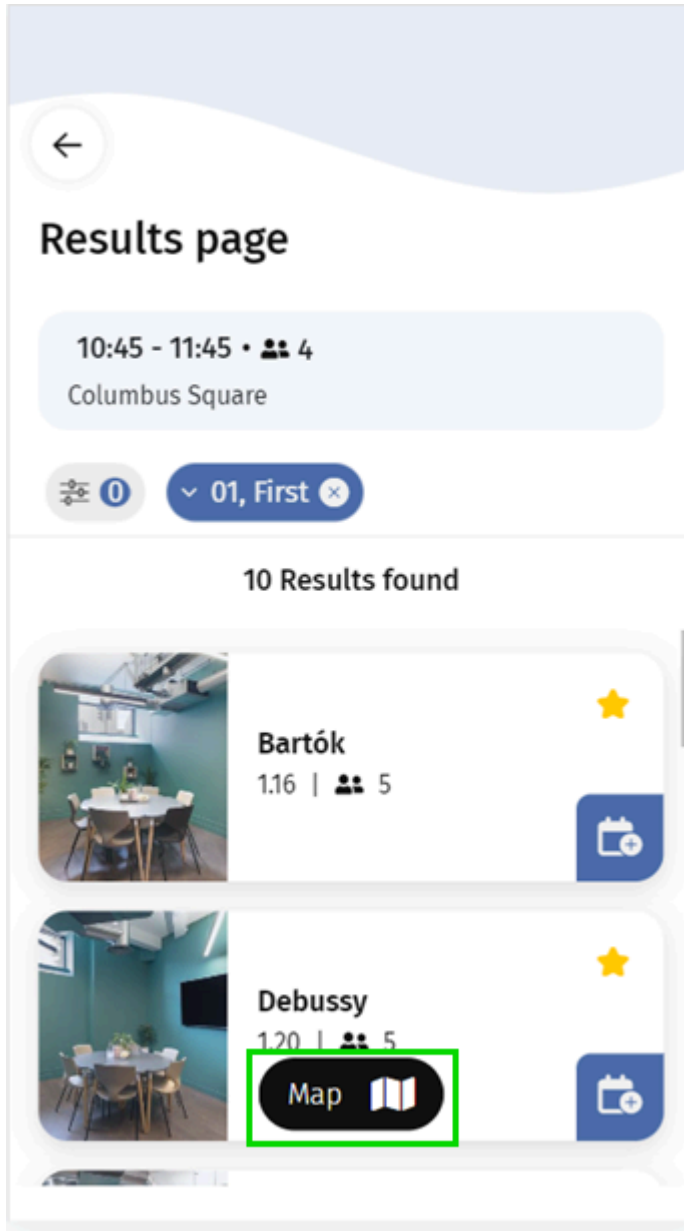
> ℹ️ If you set the **Floor** filter to **All floors**, you can access a floor selector via the **Map** icon, in list view. You can subsequently select the relevant floor and go to the selected floor plan.

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:
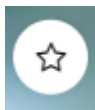
10. To view location details before booking, select the **Location** block on the **Details** page and open the floor plan.

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**.

Finalize booking

Title*
Room reservation

Date & time
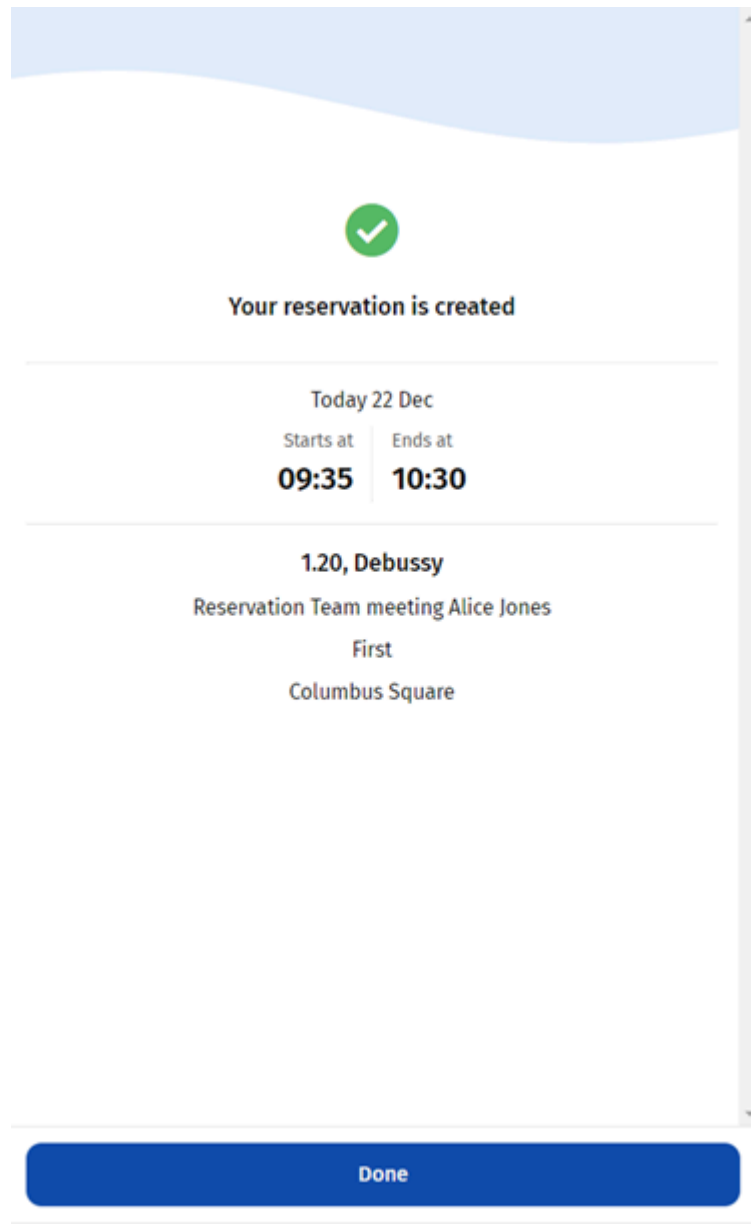Today 16:45 - 17:30

Number of people
200

Recurring
Never

Book

A **Finalize booking page is displayed.**

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

> **ℹ** To book via a QR code, see Making a reservation by scanning a QR code.

Your booking is confirmed.

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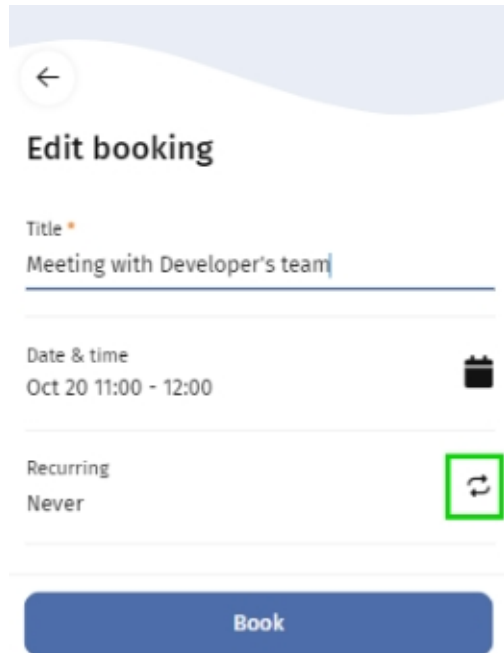
    You are redirected to the Start page. If you booked for the current date, your new reservation is shown in the Upcoming section on the start page. If you booked for a future date, you can find your new reservation under All reservations.

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.

> ℹ 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.
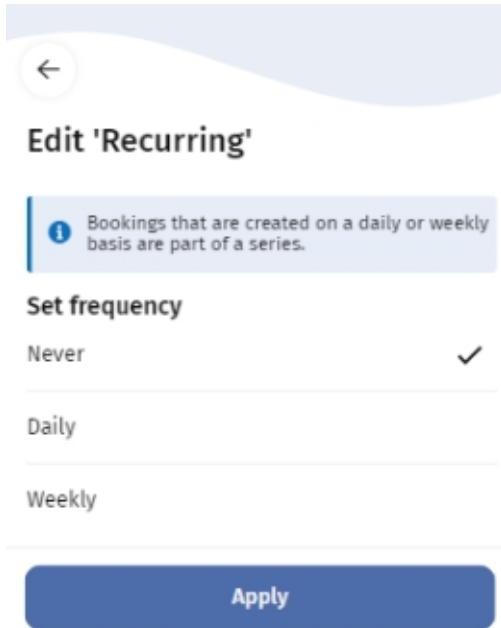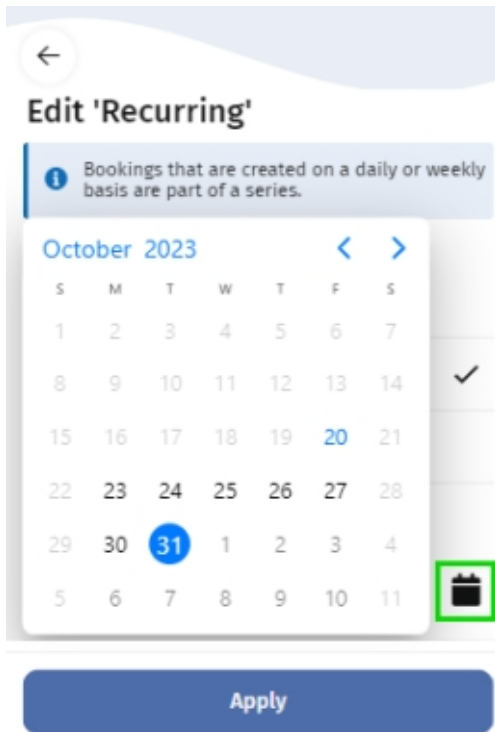
The **Edit 'Recurring'** page is displayed.

4. Select the frequency: **Daily** or **Weekly**.
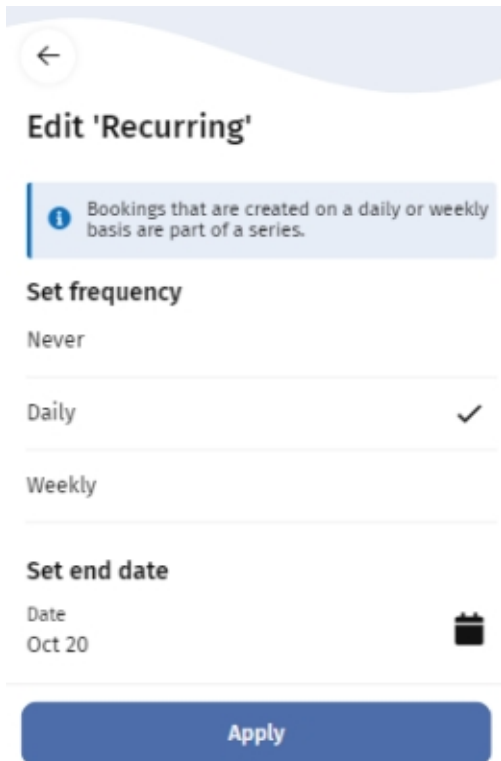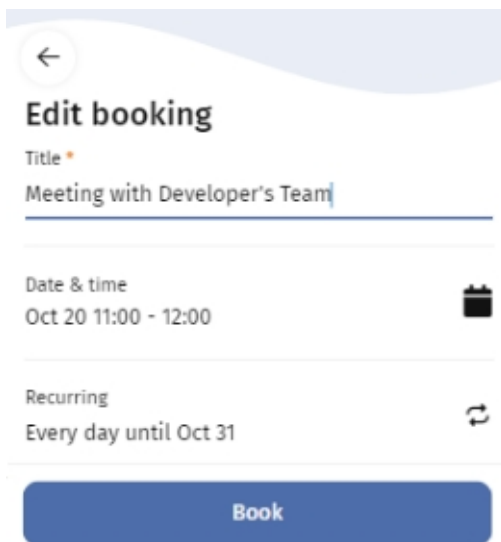

The **Set end date** field appears.

5. Click the calendar symbol on the **Set end date** field and select the end date on the calender displayed.
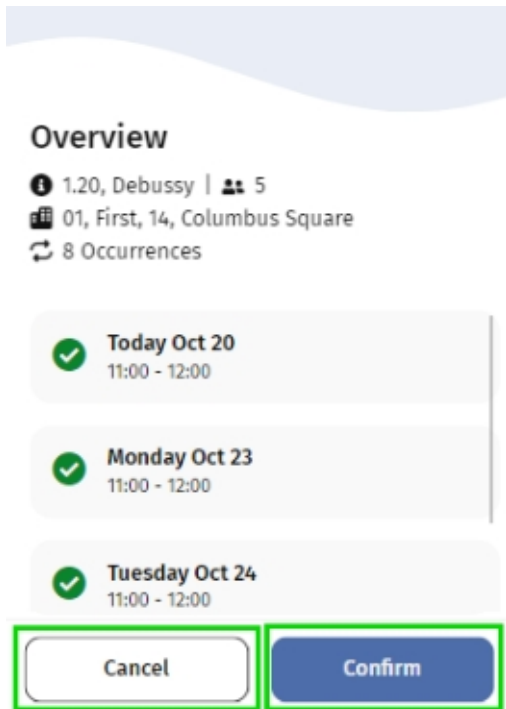

> ℹ The number of days shown here depends on your configuration. For more information, see Adding a sub to a Bookings web definition.

6. Click **Apply**.

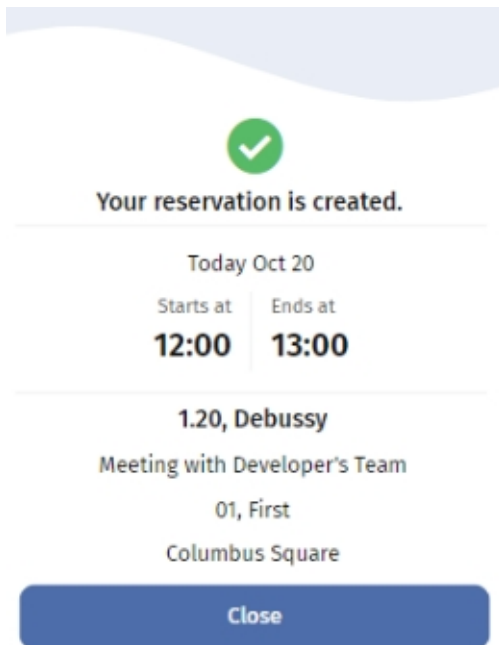   **The Edit booking page is displayed with your preferences for the booking.**

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**.

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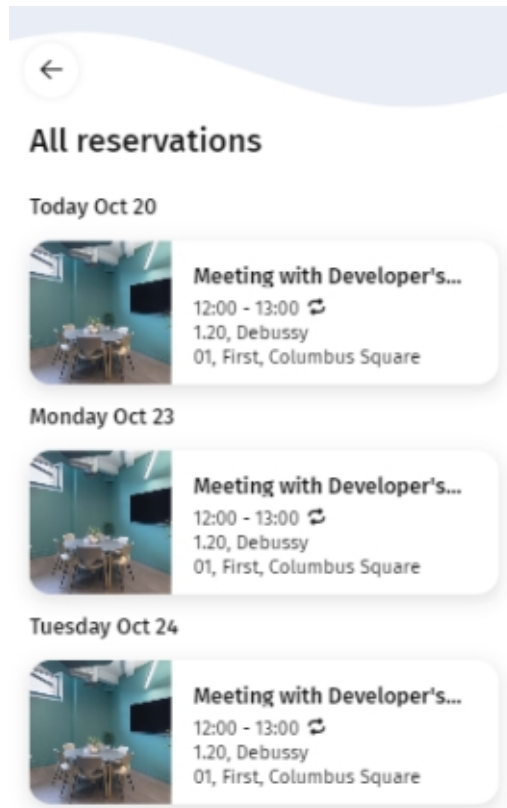
Searching for reservation units by facilities

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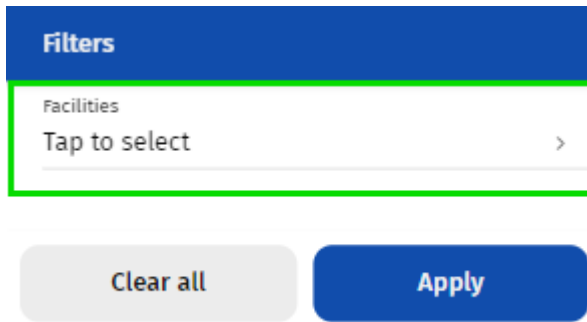
Procedure

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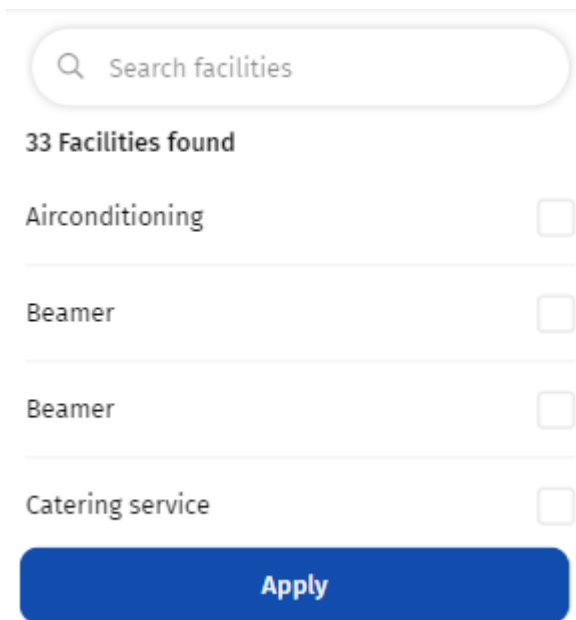
3. On the **Results page**, click   the filter button.

   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.
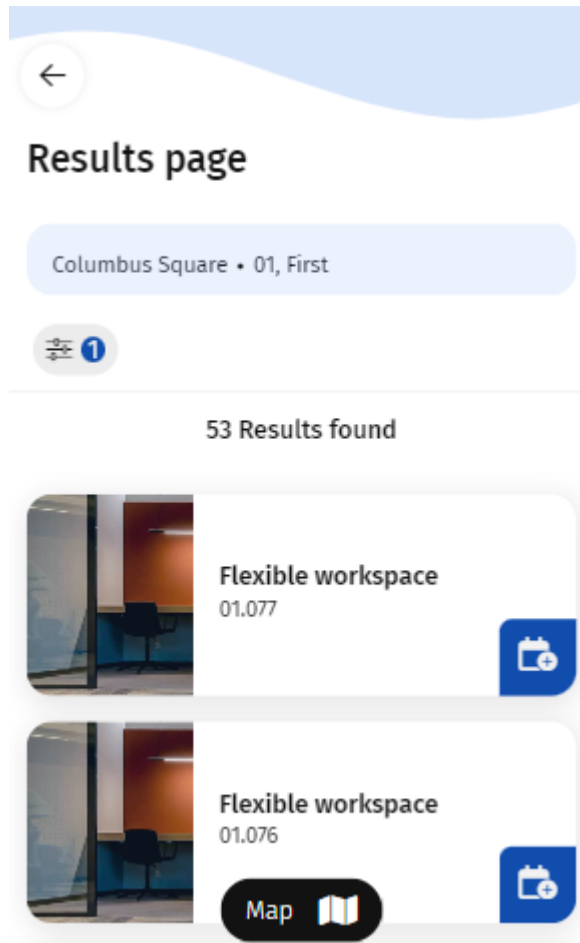
7. Select a reservation unit and select **Book**.

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.

Flexible workspace

ⓘ 01.088

🏢 01, First, Columbus Square

Availability

There are no reservations

Facilities

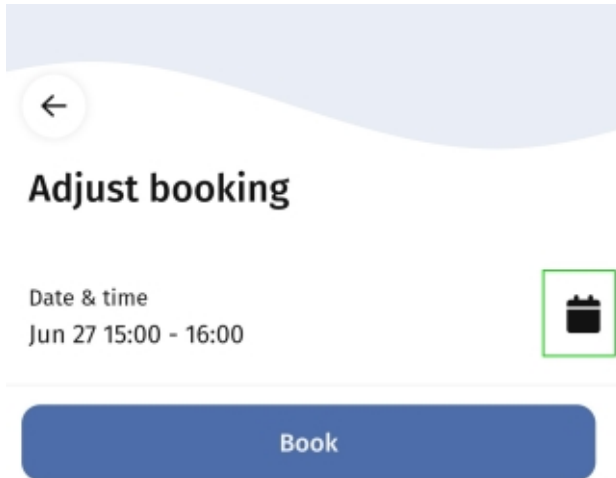Hand sanitiser

🖧 Network connection

USB connection

Today
15:00 - 16:00 Adjust

Book

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

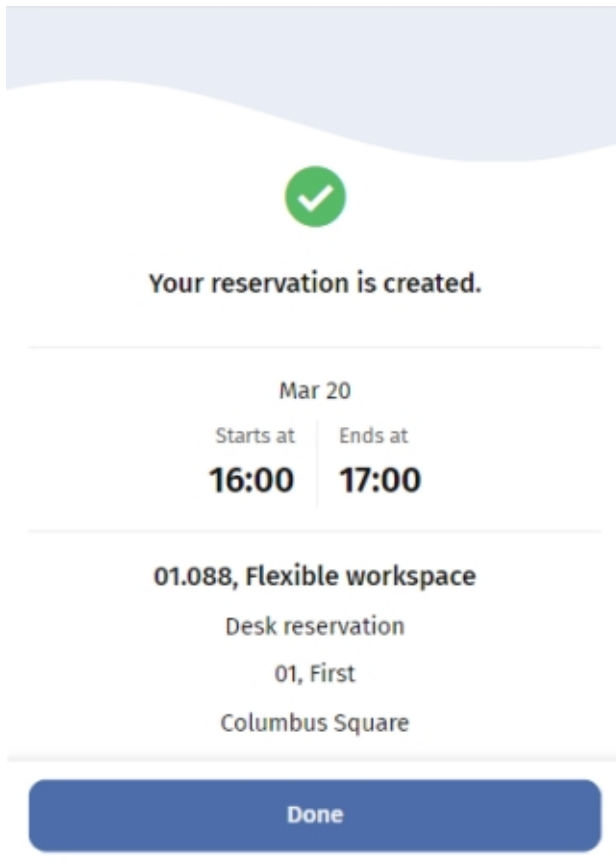The **Adjust booking** page is displayed.

3. Select a date and time and click Save.

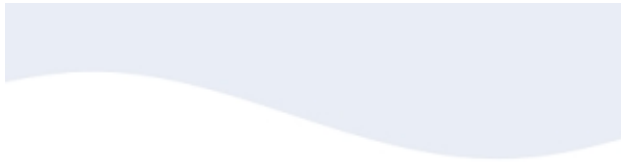   **You are redirected to the reservation unit details, with an updated date and time.**

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

   You get a confirmation that the reservation is created.

> ℹ️ 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**

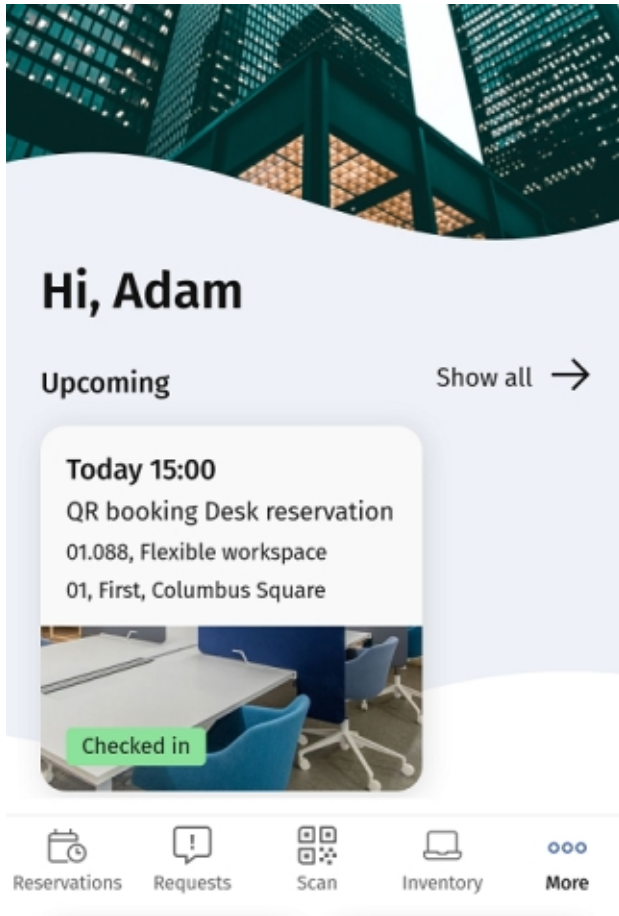**01.088, Flexible workspace**

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.
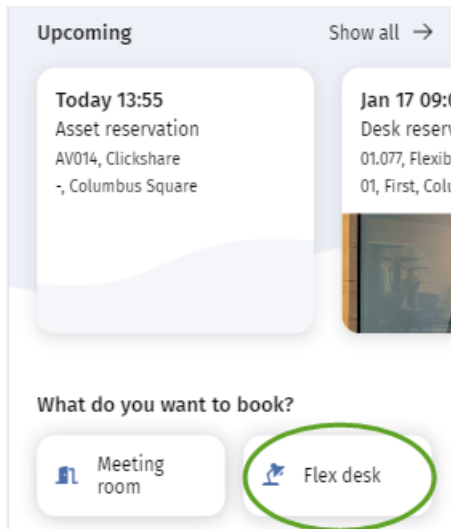
You will be directed to the Find colleague page.

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

> ℹ️ 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.

> ℹ️ 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.
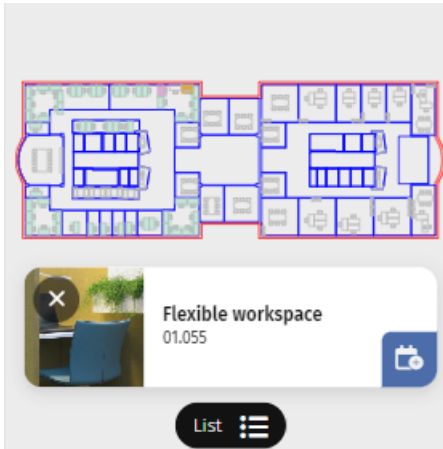
A confirmation page is shown with your reservation details.

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.

P r o c e d u r e

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**.

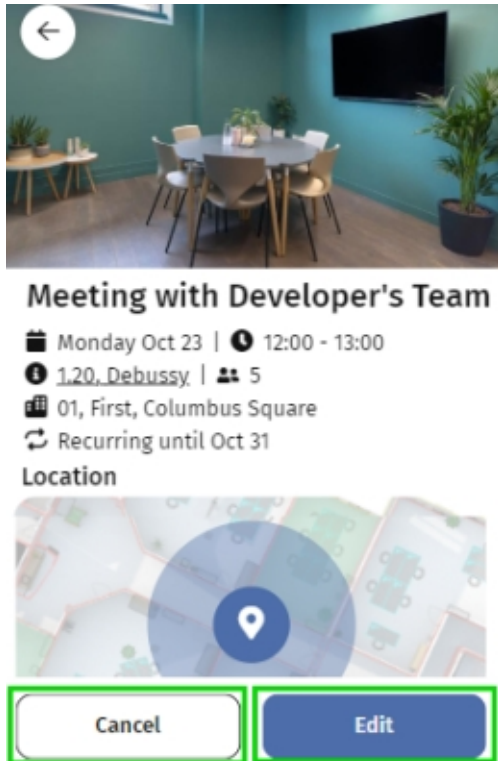   **You get confirmation that the update was successful.**

5. Select **Done**.

Editing a recurrent booking

You can update the details of an existing recurrent booking. The editing option is available for all booking types.
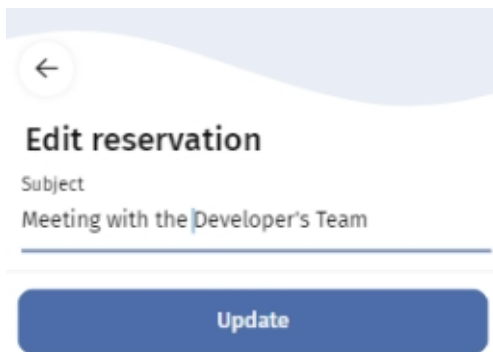
1. On the **All reservations** page, select the reservation you want to edit.

    The **Reservation details** page is displayed.

2. Click **Edit**.

The **Edit reservation** page is displayed.

3. Edit the fields as required and tap **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. Select **Yes** to apply the changes to future reservations for this recurrence, or select **No** to cancel.

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

5. Tap **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 recurrent booking. The canceling option is available for all booking types.
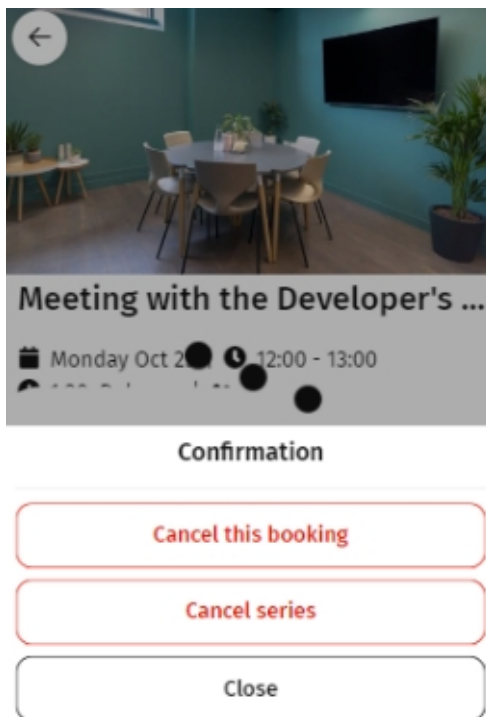
1. On the **All reservations** page, select the reservation you want to cancel.

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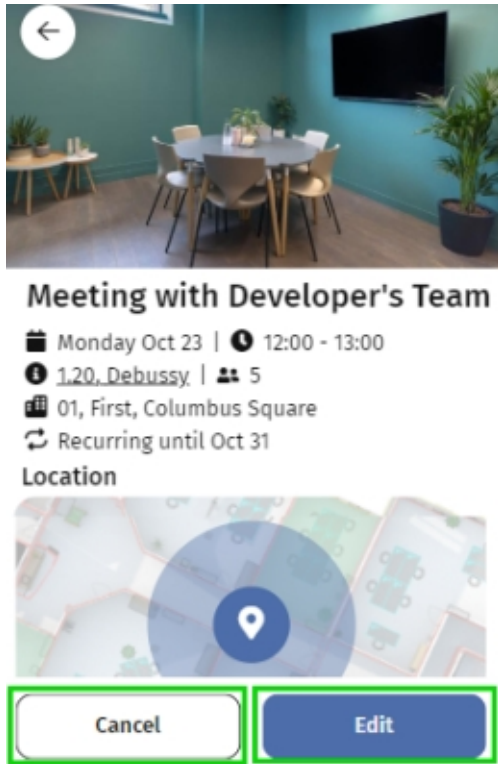
2. Click **Cancel**.

   A **Confirmation** is displayed.

3. Select **Cancel this booking** to cancel the selected booking or **Cancel series** to cancel the entire booking series; select **Close** if you want to abort the operation.

   A Cancel booking pop-up is displayed.

4. Select **Yes** to cancel or **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.

Requests

Module in the Workplace solution 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: Creating a request.

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.
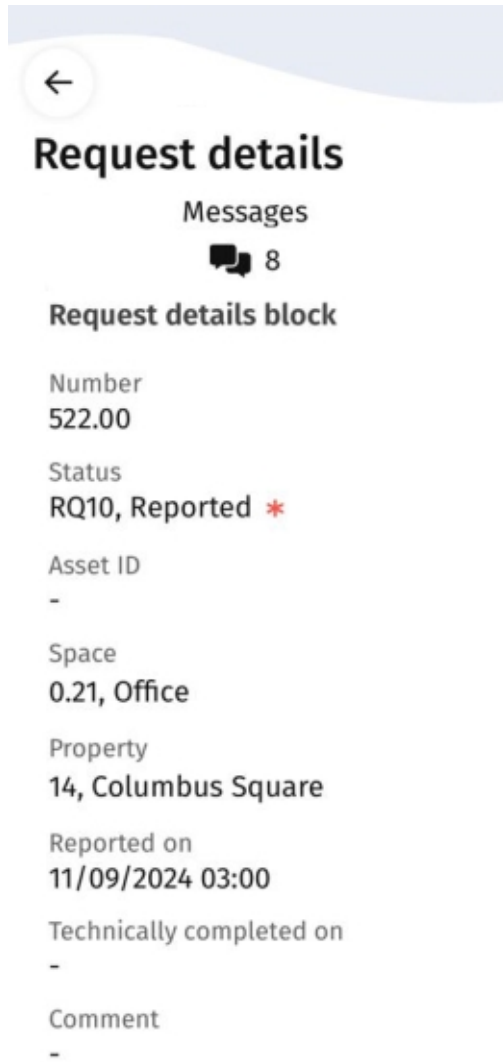
Adding / Viewing communication logs - Requests

This section describes how to add or view all relevant communications regarding the selected request in the Workplace solution .

Adding / Viewing a message

You can add / view messages regarding the selected request. This block can be used for the internal communication between you and your co-workers.

1. On the Request details page, select the Messages block.

   The Request - communication log page is displayed. You can view the existing messages.

2. To add message, enter your message in the text field at the bottom of the screen.

3. Select the Upload button to add your message to the request.

    Co-workers working on the same request will see the new message directly. The messages are also logged at the back-office, as communication logs.

My inventory

Module in the Workplace solution 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]

Spaces

A module in the Workplace solution 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.
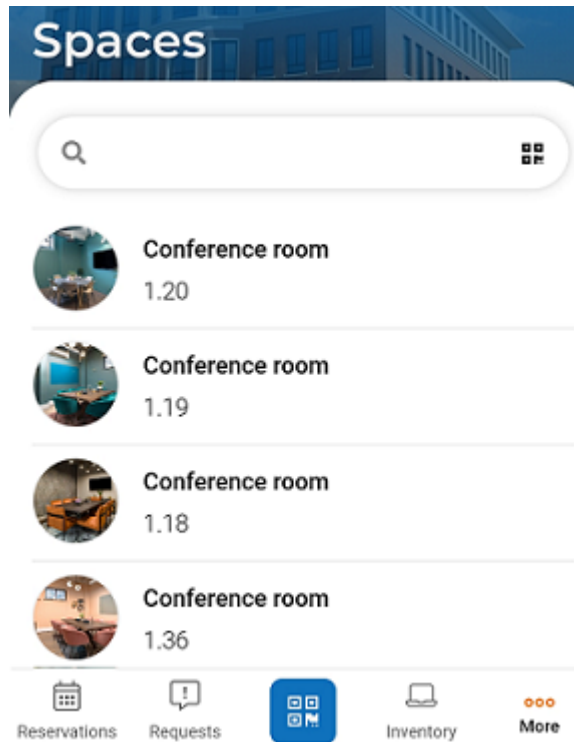
If you tap a space you will see the details of the room. Location block will give access to the space's floorplan. If any request is submitted for the space you can see them below the **Reported incidents**. You can also submit a new requests, see: Creating a request.

Space details

General information

Space number
1.17

Floor
01, First

Property
Columbus Square

Comment
-

Location

Reported incidents

Request

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 Workplace solution 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

In the Workplace solution > **Visitors** module, you can register your visitor(s).

Procedure

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.

> ℹ The **Person**, **Visiting date** and **Property** fields are automatically filled in accordance with your settings in the Workplace solution . 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

In the Workplace solution , 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. Tap Edit.

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

4. Tap 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

In the Workplace solution > **Visitors** module, you can cancel a registered visitor.

Procedure

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

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. Tap Cancel.

3. In the **Cancel visitor** pop-up, select **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.

Reservations

Module in the Workplace solution 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).

> ℹ️ Currently, an innovated version of the Reservations module is available in the Workplace solution : 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.
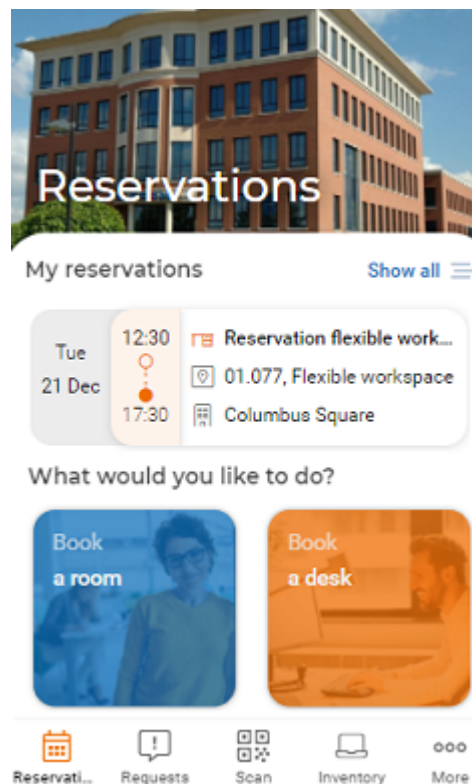
The app shows your upcoming reservations at **My reservations**. It also includes a **Show all** view that displays all pending reservations.
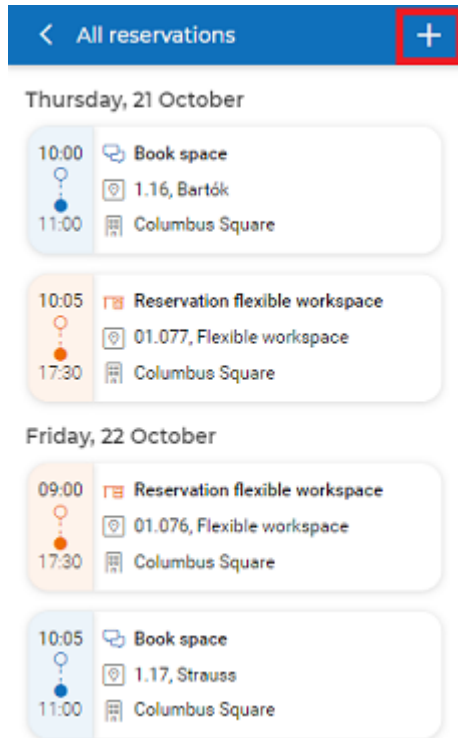
Booking reservation units via the floor plan

In the Workplace solution , you can book reservation units (meeting rooms or desks) via the floor plan.

Procedure

1. Set the start date-time for your reservation.
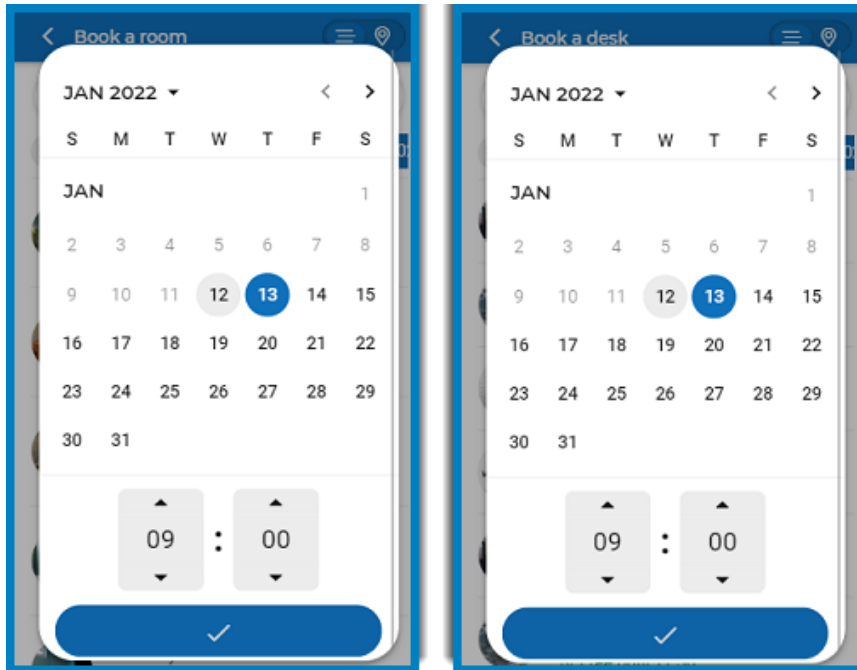
2. Set the Floor quick filter and select a floor.

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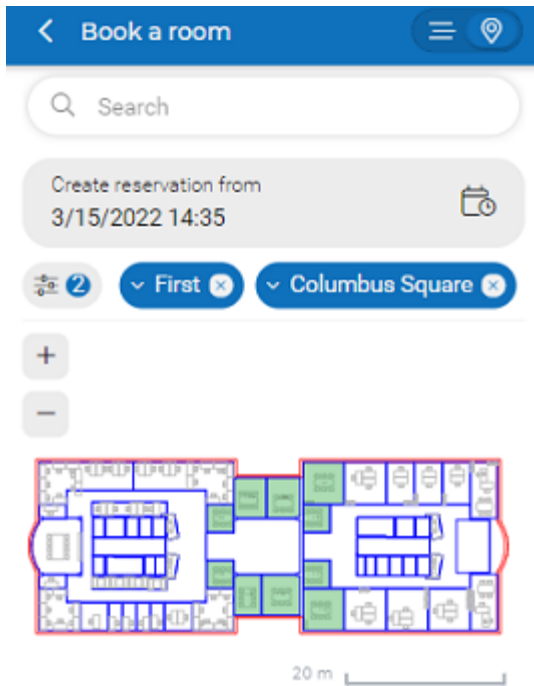
4. The availability status of a reservation unit is indicated with a color on the floor plan. The various colors and their meaning are shown below:

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

> ℹ️ 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.
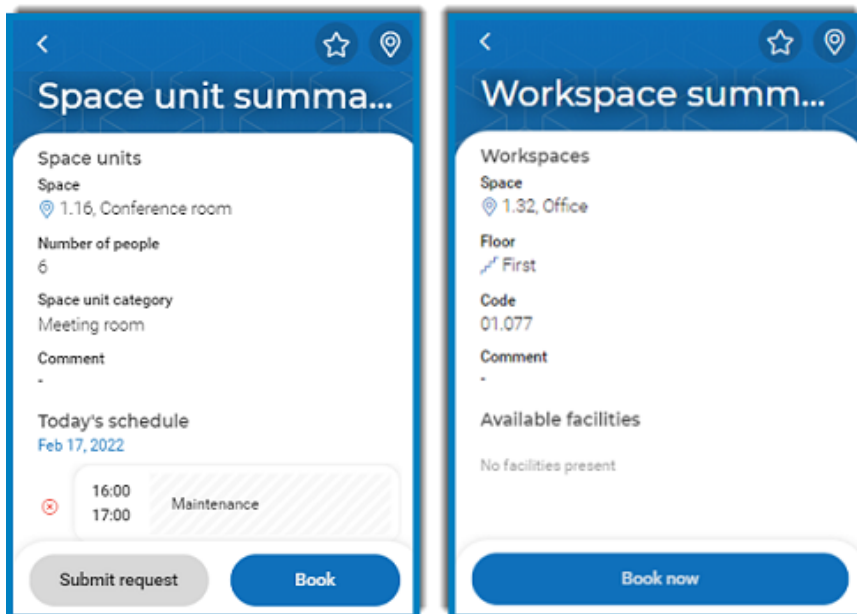
7. Select an end time for the reservation.
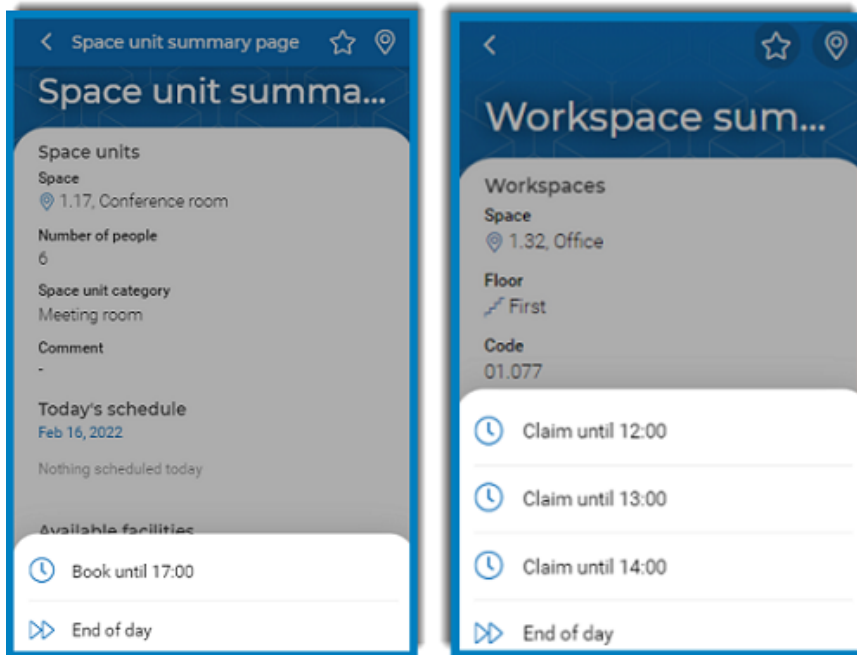
The room / desk is reserved for the selected period. The reservation is displayed on the My reservations tab.

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
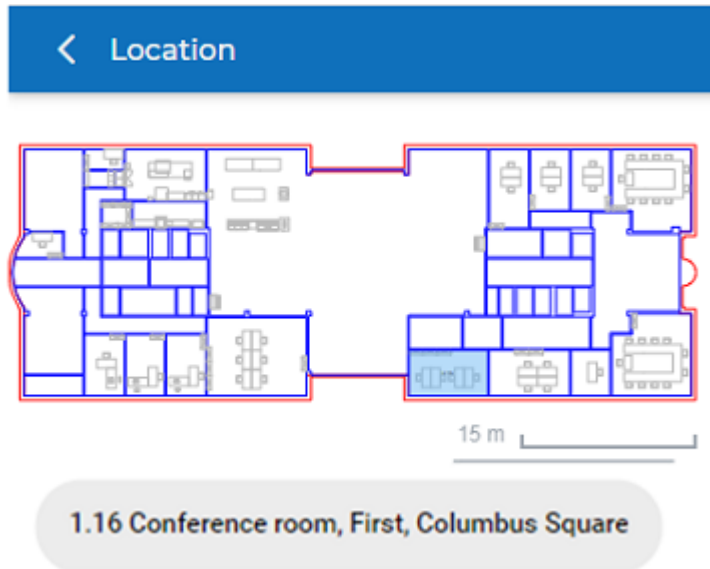
Checking in

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.

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.

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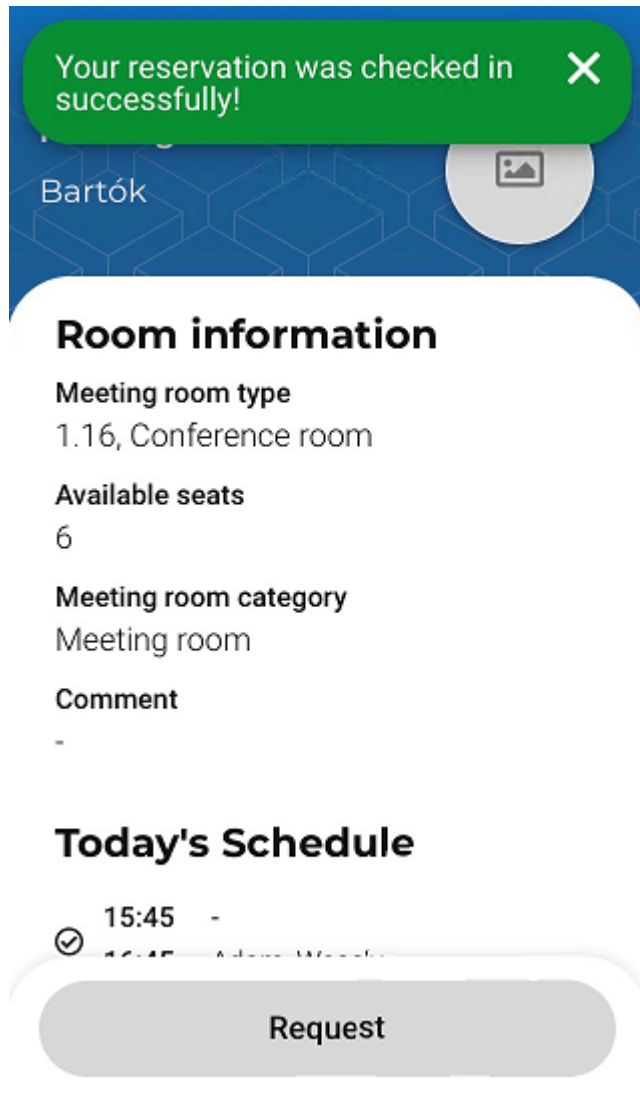
2. To make an *instant reservation* upon arrival at a meeting room / flexible workspace and check in immediately, scan the QR code.

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.
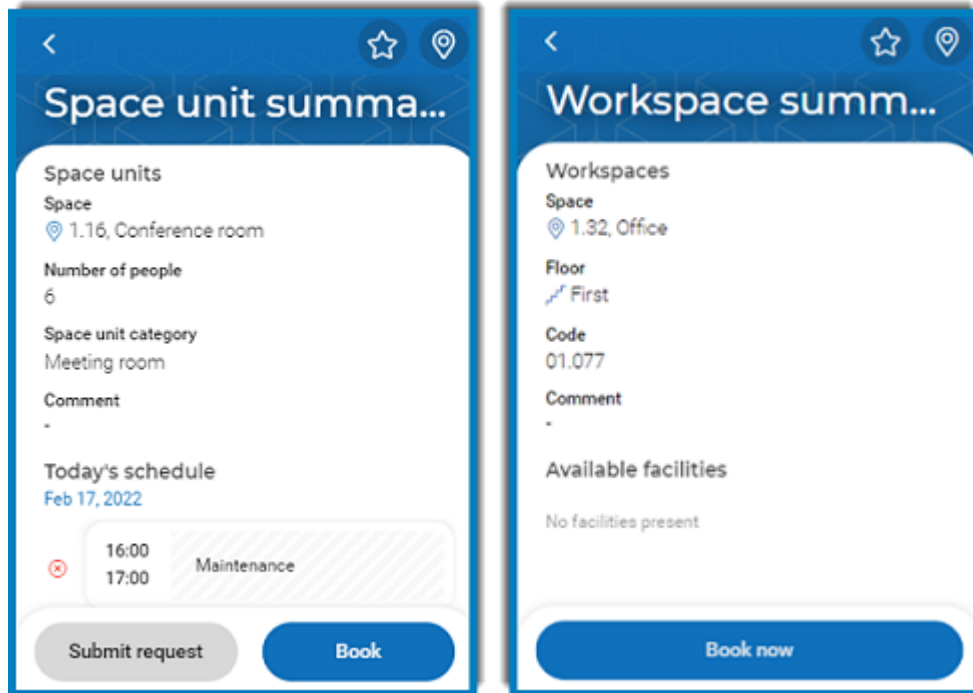
The facilities available for meeting room or desk are displayed below the **Available facilities**.

Favoriting a reservation unit

In the Workplace solution , 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.
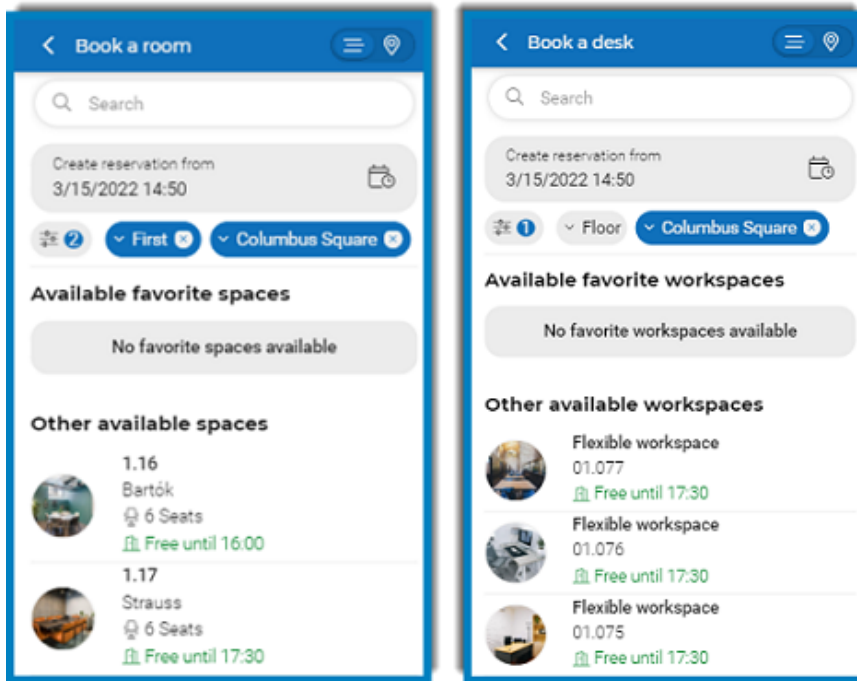
2. Select a meeting room / desk.

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

A summary page is displayed.
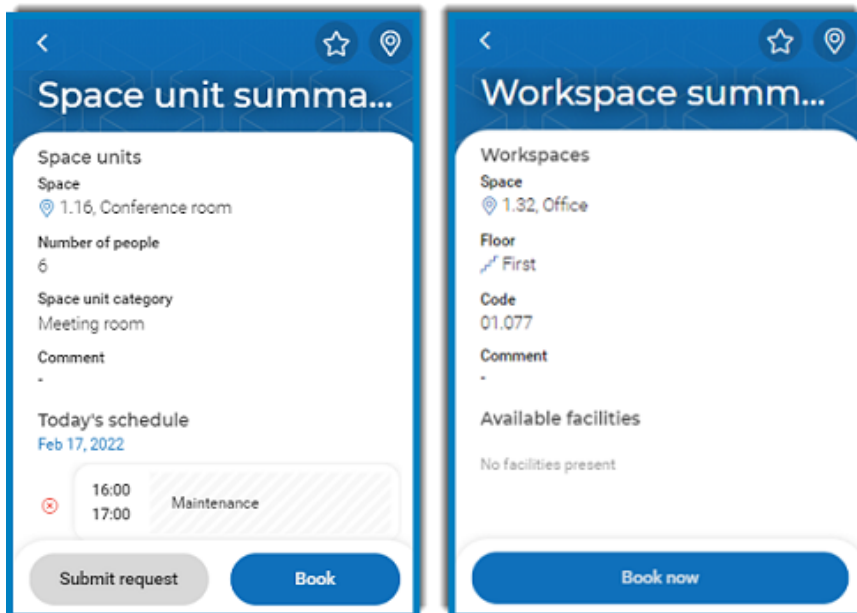
3. Tap the Star icon at the top-right corner of your screen.
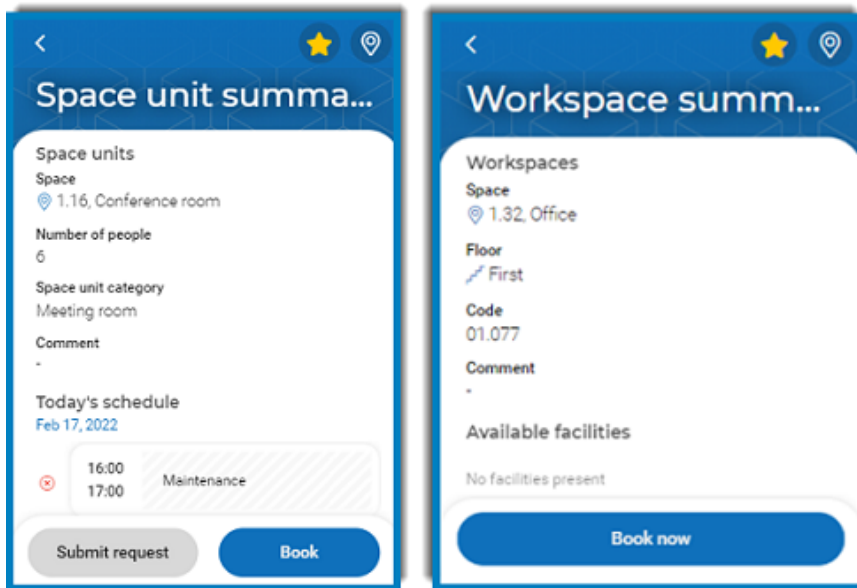
The meeting room / desk is marked as favorite and listed on the Available favorite rooms / Available favorite desks tab.
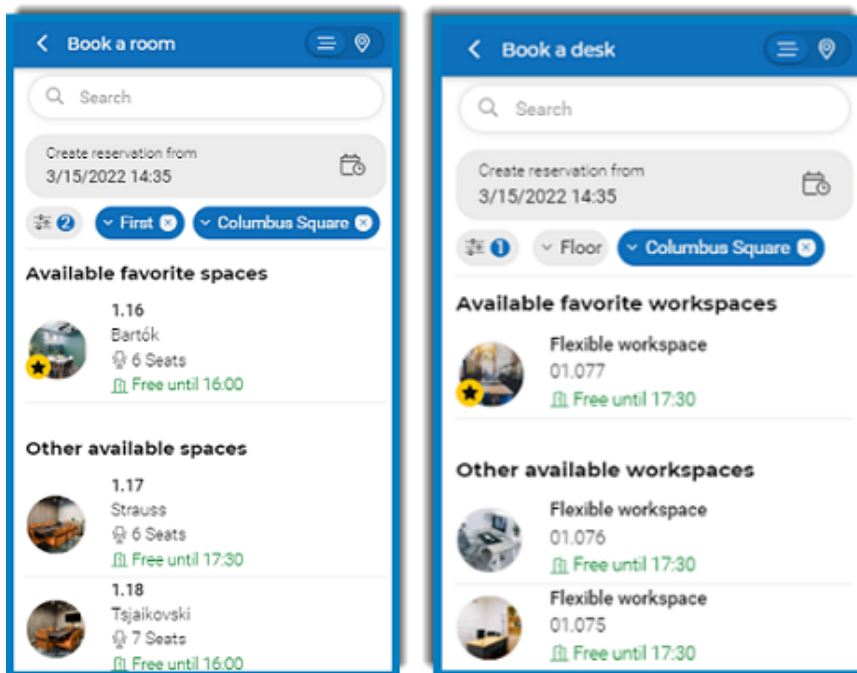
ℹ️ If a favorite meeting room / desk is not available for booking it is not shown on this tab.

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.

External links

A module in the Workplace solution 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.
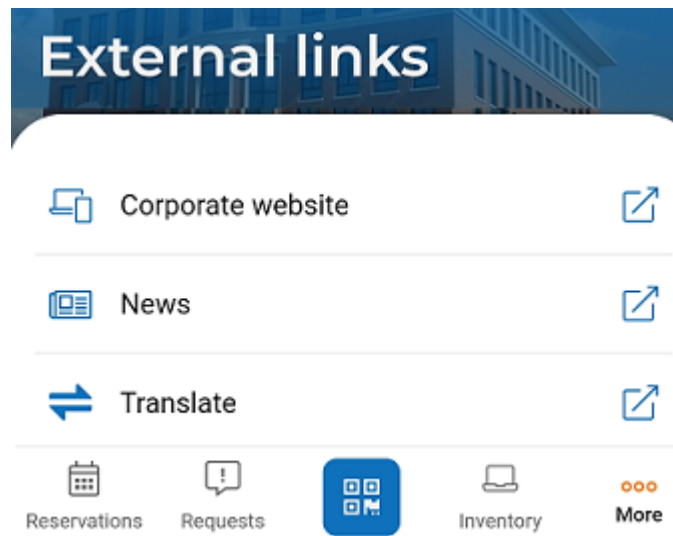
The application manager needs to validate with system administrator that the URL entered is safe and does not lead to a malicious site. For more information, see Security.

Index