Essentials Edition

Version: 1.0

Reservations

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About Reservations

The **Reservations** TSI allows you to reserve space units (conference rooms, classrooms), assets (a video projector or a particular car) and flexible workspaces. Any additional corresponding orders, such as orders for cleaning the reserved space or for catering can be registered in **Reservations**.

> Your Planon administrator can make specific reservation settings in Field Definer, for example settings concerning the display of the graphical planner or the maximum reservation length.

Reservations – Concepts

This section describes the concepts available in **Reservations** and how they interact with each other.

See the links below for more information:

- Reservations
- Standard reservations
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Reservations

You can make reservations for a reservation space unit, an asset unit or a flexible workspace. In addition, you can add subreservations and sub workorders to a reservation. For example, you can make a reservation for a meeting room, and add subreservations for an overhead projector and sub orders for catering and cleaning.

Standard reservations

It may be useful to define standard reservations for frequently recurring reservations. The use of standard reservations considerably speeds up the process of feeding new reservations into the system.

Recurring reservations

You can make a reservation recur for a specific period along with any suborders or subreservations. The recurring period can be for example, every day, week or month, or in the first week of each month.

Reservation units

In Essentials Edition , there are three types of reservation units:

- Space units

- Asset units

- Flexible workspaces

A reservation unit can be linked to a default company calendar to define it's opening hours. For more information, see Calendar.

> For more information on configuring and activating a default company calendar, refer to Supporting data and *System Settings*.

> The time zone of a reservation unit is derived from the time zone of its property.

Space units

In Essentials Edition , any spaces that can be reserved are called space units. There is a wide variety of space units that can be registered, such as meeting rooms, conference rooms and classrooms. A space unit is always linked to a specific property. In addition, you can define facilities and desk configurations for space

units. The space units that have desk configuration display the icon on the graphical planner element list. Refer to Facilities and Desk configuration.

> It is possible to link space units to spaces in Spaces & Workspaces TSI.

Asset units

Assets that can be reserved in Essentials Edition are referred to as asset units. There is a wide variety of asset units that can be registered, such as a data projector, a computer, a video projector, or a company car. These are in fact portable asset units that do not belong to a fixed space. A data projector fixed to the ceiling of a space cannot be registered as an asset unit, whereas a portable data projector can. Fixed assets can be booked along with the space unit they are located in. In that case they should be registered as a facility that is linked to the space unit. Refer to Facilities.

> It is possible to link asset units to assets in Technical assets TSI.

Flexible workspaces

A workspace that is not defined as a fixed workspace but which can be used for working is known as flexible workspace. For example, a lounge area. You can create flexible workspaces in the graphical planner and make reservations for them.

> Flexible workspaces can also be added and maintained in Spaces & Workspaces . For more information on flexible workspaces, see Spaces & Workspaces documentation.

Graphical planner

Graphical planner is the graphical representation of reservations. It also enables you to add/modify reservation units. There are two views available on the reservation units:

- Data view - Here you can view / add / delete / modify reservation units.

- Graphical planner - Here you can view / add / delete / modify reservations on the reservation unit.

Compound reservation units

A Compound reservation unit is formed by combining multiple reservation units (space, asset, flexible workspace units). The combination typically has a parent (main) reservation unit and one or more child reservation units. The parent and child reservation units are linked together and once a reservation is created on a parent reservation unit, all the related child reservation units are also reserved for that period. For example, a room that can be split into two separate rooms using a removable wall.

The following combinations of space/asset/flexible workspace units are possible for creating compound reservation units:

- A main space unit with space/asset/flexible workspaces as children.

- A main flexible workspace with asset units as children.

> A child reservation unit (linked to a compound reservation unit) cannot be a parent to any other reservation unit.
> An asset unit can never be a parent reservation unit in a compound reservation unit.

Following image shows an example of parent and child hierarchy:
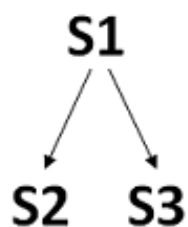
S1 is a parent reservation unit and S2, S3 are child reservation units.

The reservations created for these three reservation units in graphical planner is displayed below:

When parent S1 is reserved, ghost reservations are automatically created for children S2 and S3. When S2 is reserved, the parent S1 will also be reserved, since S2 is part of S1. Same is the case when S3 is reserved. Primary reservation is indicated by green color and ghost reservation is indicated by gray color on the graphical planner.

Transition period

The transition period is the passage time reserved before and after the actual reservation. This transition period can be used for restoring the desk configuration, cleaning etc. During this period the reservation unit is not available for reservation.

The transition period is defined on the reservation unit in minutes.

> It is also possible to define one general transition period that applies to all reservation units. This setting can be made in Field definer .
> If no transition period is specified for a reservation unit in **Reservations** (the **Transition period in minutes** field is left empty), the general transition period as specified in Field definer will be applied. For more information, see Field definer documentation.

Facilities

Any fixed provisions in a space unit / flexible workspace, such as a network connection or a projection screen, can be registered as facilities in Essentials Edition . Portable asset units that do not belong to a fixed space, such as portable data projectors, can be registered as asset units and reservations for these items can be made separately.

The list of available facilities is defined by your organization. You can define the facilities in the data view on the reservation unit level.

Essentials Edition shows all space units / flexible workspaces in which the specified facilities are present. The available facilities can be specified for each space unit / flexible workspace. In the Graphical planner, you can filter the reservation units based on their facilities.

Desk configuration

Essentials Edition allows you to specify the desk configuration in a space unit, for example circle, rows, or square. If the space units are filtered according to a specific desk configuration in the graphical planner, only space units with a configuration that corresponds to the desired desk configuration are shown.

Orders

In **Reservations**, you can add one or multiple orders to a reservation, for example: orders for catering or for cleaning the reserved space.

Order lines

In **Reservations**, order lines can be added to a suborder of a reservation. For example, in the catering order for a lunch meeting you can register what food and which beverages you want included.

> ℹ️ For more information on order lines, refer to Work Orders .

Answer lines

The **Answer lines** step displays the answer lines of the questionnaire linked to the standard reservation.

> ℹ️ For more information on questionnaires, refer to Questionnaires document.

Documents

Documents can be linked to a reservation and to any relevant suborders. Documents include:

- **Forms** (for example, a proposal request or order form)
- **Files** (such as a cost calculation created in a Microsoft Excel spreadsheet or a scanned proposal)

- **Memos** (for internal communication)

> ℹ️ For more information on adding documents, refer to Work Orders .

Visitors

You can link visitors to a reservation, for example: the participants for a course or meeting. When you add a visitor to a reservation, the visitor can then be retrieved in **Reservations** and in Work Orders and Personnel .

Floors and spaces

You can use the **Floors and spaces** selection step to easily find the reservation units present on a floor or space.

> ℹ️ For details on adding and maintaining floors and spaces, see Spaces & Workspaces .

Reservation costs

When adding a reservation, you can directly register the reservation costs in the **Reservation Costs** window. There are three methods for charging back reservation costs. In Essentials Edition you can charge back reservations based on arrangements, tariff groups, price agreements, and combinations of these.

> ℹ️ For more information on registering costs, refer to Work Orders .

Arrangements

In Planon ProCenter you can specify your own arrangements. In an arrangement, a fixed price per person is arranged, for example, for a morning meeting including lunch. With this charge back method it is impossible to automatically charge the cancellation costs.

Tariff groups

A tariff group is a detailed set of different tariff amounts (per hour, morning, afternoon, night etc.) and cancellation fees for a specific type of reservation. You can specify your own tariff groups in Supporting data . For more information, see Supporting data documentation.

Price agreement

A price agreement is a fixed price you have agreed upon with the requestor of the reservation.

Working with Reservations

This section identifies the processes and tasks that can be performed in **Reservations**.

See the links below for more information:

- Adding a reservation
- Finding available reservation units
- Copying a reservation
- Moving a reservation
- Specifying reservation costs
- Replacing reservation tariff groups
- Adding suborders to a reservation
- Adding visitors to a reservation
- Adding documents to a reservation
- Changing a reservation's status
- Archiving reservations
- Using standard reservations and orders
- Making a reservation recurrent
- Modifying a recurring reservation
- Changing the status of recurring reservations
- Creating projects

Adding a reservation

There are two methods to create a reservation:

- On the **Reservations** selection level.
- On the Graphical planner.

A reservation added on the **Reservations** selection level is also displayed on the **Graphical planner** and vice versa.

Procedure

1. Go to the **Reservations** selection level.
2. On the action menu, select **Add** > **Reservation**.
3. Complete the **Start date & time** and **End date & time** fields.
4. Select the **Reservation unit**.
5. Complete other relevant fields in the data section.

   For information on the available fields, see Reservation fields.

6. Click **Save**.

7. Specify the reservation costs if required.

   For more information on reservation costs, refer to Specifying reservation costs.

   For information on adding a reservation based on standard reservation, see To add a reservation based on a standard reservation.

Adding a subreservation

On adding a subreservation, much data is inherited from the main reservation.

For example, you make a reservation for a space unit for a meeting and you add a separate reservation for a data projector. Later, if you change the start and end time of the space unit reservation, the data projector reservation will have to be changed manually or else it would be reserved for the wrong time. However, if you add the reservation of the data projector as a subreservation to the reservation of the space unit, the start and end time of the data projector reservation would automatically be in sync with the space unit's reservation time.

Procedure

1. Go to **Reservations**.
2. Select the reservation for which you want to add a subreservation.
3. On the action menu, select **Add sub**.

   Complete the fields in data section. Most of the fields are inherited from the main reservation.

   For information on the available fields, see Reservation fields.

4. Click **Save**.

   A subreservation is created beneath the main reservation.

   For information on adding a standard reservation as subreservation, see Adding a suborder based on a standard order.

Finding available reservation units

If you want to add a reservation, you can easily retrieve the available reservation units in two methods:

 • In the reservations selection level.

 • In the Graphical planner.

Procedure

1. Add a new reservation.

   For more information on how to do this, refer to Adding a reservation.

2. Complete the **Start date & time** and **End date & time** fields.
3. In the **Reservation unit** field, click the **Select a value** button.

   The **Reservation unit** dialog box opens.

   By default the **Space units** tab is selected, but you can click the **Asset units** tab or **Flexible workspaces** tab.

4. Select the required filter option:

All: all reservation units are shown. This is the default setting in Essentials Edition .

Property: only the reservation units of a specific property are shown.

Complex: only the reservation units of a specific complex are shown.

By selecting the required filter option, you can minimize the list of reservation units displayed.

> Essentials Edition retains the selected filter option.

Check the **Show available reservation units from...to** check box to retrieve, within the filtered list of reservation units, the available reservation units, i.e. reservation units which are not reserved at the specified start date-time and end date-time.

Copying a reservation

If you want to replicate a reservation for different date and time or reservation unit, you can do so by copying the reservation.

Procedure

1. Select the reservation that you want to copy.
2. Click **Copy** from the action menu.

   The **Enter values** dialog box appears.

3. Select the date and time to which you want to copy the reservation.
4. Select the reservation unit to which you want to copy the reservation.
5. Select the required copy option when prompted to copy any suborders or visitors along with reservation that is copied.
6. Click **Proceed**.

   The reservation has now been copied.

   Note the following effects after copying a reservation:

   - If the original reservation includes reservation costs based on an arrangement and/or price agreement, these costs are adopted for the copied reservations.

   - If the original reservation includes reservation costs based on a tariff group, the reservation costs will be recalculated for the copied reservations.

   - If the original reservation includes actual costs and/or costs from estimates or man-hours, these costs are also adopted for the copied reservations.

Moving a reservation

In Essentials Edition , you can easily move an existing reservation to another date/time and/or another reservation unit, if required. You can move a reservation in two methods:

- In the reservations selection level.

- In the Graphical planner.

Procedure

1. Select the reservation to be moved.
2. In the **Start date & time** and **End date & time** fields enter the new values.
3. In the **Reservation unit** field select another reservation unit to move the reservation to another reservation unit.
4. Click **Save**.

   You have now moved the reservation.

> 💡 If a reservation includes reservation costs and has the **Administratively complete** status, it cannot be moved.

Changing the main reservation's start / end times

This topic describes the consequences of changing the main reservation's start/end times with regard to the respective sub reservations and visitors.

When changing the start time, the subs of all types reflect the main reservation's start time changes. In other words, if the main reservation moves to an earlier or later time, all subs also move along (if possible).

However, when moving the end time of a main reservation this behavior only applies to subs of the type Reservation. For any other type of suborder (such as a work order), the end time is not affected by changing the end time of the main reservation. If a start/end time and/or occupancy conflict arises for the changed subs (Reservations, Orders), an error will be displayed.

The expected arrival/departure time of visitors linked to the reservation will change in parallel with the start/end date time of the reservation. If there is a start/end conflict, you will receive a warning.

The following example illustrates this by providing two scenarios:

Example

Original reservation

	Type	Start	End
Main Reservation	Reservation	9:00	17:00
Subs			
Catering	Order	9:30	10:30
Projector	Reservation	10:00	17:00
Visitor 1	Visitor	9:00	16:30
Visitor 2	Visitor	16:00	17:00

Scenario 1: Starting one hour later

	Type	Start	End	Remark
Main Reservation	Reservation	10:00	17:00	
Subs				
Catering	Order	10:30	11:30	
Projector	Reservation	11:00	17:00	
Visitor 1	Visitor	10:00	16:30	
Visitor 2	Visitor	16:00	17:00	Warning

Scenario 2: Finishing two hours earlier

	Type	Start	End	Remark
Main Reservation	Reservation	9:00	15:00	
Subs				
Catering	Order	9:30	10:30	Unchanged
Projector	Reservation	10:00	15:00	
Visitor 1	Visitor	9:00	14:30	
Visitor 2	Visitor	16:00	17:00	Warning

> A Reservation created through Microsoft Outlook cannot be moved. However, they can be extended or shortened. In order to allow shortening of such reservations, you must select **Yes** at the setting **Allow shortening of reservations made by Exchange?**. For more information on the setting, see Reservations - order settings.

Specifying reservation costs

In order to automatically charge back the costs of reservations, Essentials Edition provides several charge back options that can be used from the **Reservation costs** window.

If you want to specify reservation costs for a selected reservation, click **Reservations costs** from the action menu. Subsequently, you can add or modify all relevant reservation costs that are to be charged back to the FM customer in the **Reservation costs** window.

Procedure

1. Go to **Reservations** selection level.
2. On the action menu, click **Reservations costs**.
3. The **Reservation costs** dialog box appears. Here you have to select from the following calculation methods available:

- ◦ **Arrangement only** - Select an arrangement from the pick list in the **Arrangement** section.

- ◦ **Price agreement** - Specify a price.

- ◦ **Tariff group** - Select a specific tariff group from the list.

If you selected **Tariff group** calculation method, the required number of years, months, weeks, days, mornings, afternoons, or hours in the appropriate tariff count fields are specified in the section with tariff variables.

If a tariff group is linked to a reservation unit, the reservation costs (including VAT costs and any cancellation costs) are automatically calculated (if indicated in the reservation settings) and registered in the **Reservation costs** window.

> The tariff count fields are read only and cannot be edited. If the user wants deviating costs, it can be done by either selecting a Price agreement or by applying a discount. For example, the user can charge only 3 hours instead of the calculated 3.35 hours.

4. Select **Yes** in the **Arrangement (Y/N)** field to specify that an additional arrangement applies, if you have combined the **Tariff group** or the **Price agreement** with an additional arrangement.

   The number of people for which the reservation is made, is automatically specified in the center field of the **Arrangement (Y/N)** section. This number is derived from the **Number of people** field of the reservation itself. In the last field of the **Arrangement (Y/N)** section, you can select an arrangement from the list.

5. The subtotal of the reservation costs is displayed in the **Subtotal reservation costs** field.

6. If applicable, select a discount percentage or discount amount in the appropriate fields. To specify a surcharge, enter a negative discount.

7. If the reservation is canceled, enter a cancellation date for the reservation. The cancellation costs are applied automatically.

8. If applicable, select a (different) VAT tariff and view the total costs in the **Total costs** section.

9. Click **Save**.

   You have now added reservation costs to the selected reservation.

   To modify the reservation costs, all you have to do is to modify the required field values and save them.

> The reservation costs are automatically generated along with the tariff group assigned, if you enable the **Automatically generate reservation costs** option in Field definer .
> If you do not enable the **Automatically generate reservation costs** option, you can generate the cost line manually at a later time in the **Reservation costs** window.

> If cancellation costs have been specified for the tariff group that is linked to a reservation and if the status of the reservation is changed to **Canceled**, the **Reservation costs** window will open automatically. Subsequently, a cancellation date and cancellation fee will be specified in the cancellation section.

ℹ️ Your organization can define its own tariff groups and arrangements. For more information on adding and maintaining tariff groups and arrangements, refer to Supporting data .

Recalculating tariff amounts in the Reservation costs window

If you have made a reservation for a reservation unit that is linked to a tariff group, or if you have manually linked a tariff group to your reservation, the reservation costs are automatically calculated according to the tariff group specifications.

Essentials Edition will always select the most advantageous option. In other words, if it is less expensive to charge one morning instead of four hours, one morning will be charged.

Reservation costs on the Actual costs selection step

Reservation costs for reservations that do not have the Reservation option status will result in a cost line on the **Reservation details** > **Actual costs**.

ℹ️ For more information on the reservation settings, refer to Field definer .

The costs of reservations and orders can also be registered and viewed as cost lines on the **Actual costs** selection step. Refer to the section on Reservation costs on the Actual costs selection step.

You can also register a reservation's estimates, actual costs, and man-hours.

ℹ️ For more information on registering estimates, actual costs and man-hours, refer to Work Orders .

Adding suborders to a reservation

In Essentials Edition you can add suborders to your reservation. For example, if you have reserved a meeting room, you may want to add orders to change the room's desk configuration from rows into a square, to serve lunch, or to have the room cleaned.

Procedure

1. Go to **Reservations**.
2. Select the reservation to which you want to add suborder.
3. On the action menu, select **Add sub**.

   Complete the fields in data section. Most of the fields are taken from the main reservation. For information on the available fields, see Reservation fields.

   Select **Add standard sub** if you want to add a suborder based on a standard order. For more information, refer to Using standard reservations and orders.

4. Click **Save**.

   A suborder is created.

If the main reservation is moved to another time or another reservation unit, the suborders (where applicable) are changed accordingly. For more information on moving a reservation, refer to Moving a reservation.

If you want to order catalog items or purchase items together with your reservation, you can add a requisition or purchase order to your reservation. For each catalog item you order, you have to add a requisition line or purchase order line to your requisition/purchase order.

> For more information on adding requisition lines, purchase order lines, orders and order administration, see Work Orders document.

> Creating many suborders or adding many order lines to a (sub) order will have a negative impact on the performance in processing such an order. The amount of suborders/order lines from which the performance will be reduced as well as the impact on the performance depends on your local infrastructure.

Adding visitors to a reservation

You can link visitors to a reservation, for example the participants of a course or a meeting.

> Visitors added to a reservation are automatically added to Personnel .

Procedure

1. Go to the **Reservations** selection level.
2. Select the reservation to which you want to add one or more visitors.
3. Go to **Reservation details** > **Visitors**.
4. On the action menu, click **Add to reservation**.
5. Depending on the type of visitor internal / external, specify the name of the visitor in the **Name internal visitor** field or **External visitor** field.
6. Enter data in the relevant fields.

> By default, the fields **Visiting date**, **Person**, **Property**, **Expected arrival time**, **Expected time of departure** and **Meeting** automatically inherit their values from the **Reservations** selection level. The **Meeting** field is read-only and automatically inherits the name of the reservation from which you descended. For more information on visitor data, see Personnel document.

7. Click **Save**.

> If you move a reservation with visitors to another space unit and/or time, the linked visitors are moved accordingly.

If you want you can view the reserved space unit or flexible workspace linked to the visitor through the **CAD Integrator** drawing.

Swapping reservations

If a visitor has already been linked to a meeting but you want to change the meeting the visitor is linked to, proceed as follows:

Procedure

1. Go to **Reservation details** > **Visitors**.
2. select the visitor you want to link to another meeting.
3. On the action menu, select **Swap reservation**.

   The **Enter values** dialog box appears.

4. In the **Meeting** field, select the reservation to which you want to link the visitor.
5. Click **OK**.
6. In the **Enter values** window, click **OK**.

   The visitor is now linked to another reservation.

> It is possible to unlink a visitor form a meeting/reservation by not selecting any reservation in the **Meeting** field.

Copying visitors to another reservation

In Essentials Edition , visitors can be copied from one reservation to another, for example if the visitor concerned attends more than one meeting.

Procedure

1. On the **Visitors** selection step of the **Reservation details** selection level, select the visitor you want to copy to another reservation.
2. From the **Visitors** action menu, select **Copy to reservation**.

   The **Enter values** pop up is displayed.

3. In the **Meeting** pick list, select the reservation to which you want to copy the visitor. Click **OK**.
4. In the **Enter values** window, click **OK**.

   The visitor is now copied to the selected reservation.

Adding documents to a reservation

It is possible to link documents to reservations and orders. Documents can be linked to a selected reservation via the **Reservation details** > > **Documents**.

> ℹ️ For more information on adding and retrieving documents and document data, refer to Work Orders .

Changing a reservation's status

You can change a reservation's status by choosing one of the available status transitions from the action menu. For reservations in the graphical planner, you can change the status of a reservation by double clicking and opening the reservation, selecting the required status from the action menu.

The available statuses for a reservation are given below:

✳️ - Reservation Requested

✖️ - Reservation Cancelled

❓ - Reservation in Option

▶️ - Reservation Made

✉️ - Reservation Administratively complete

For a description of the statuses, refer to Reservation statuses. It is also possible to create your own user-defined statuses.

> ℹ️ For more information on user-defined statuses, refer to Field definer .

> 💡 If authorization permits, there may be several initial statuses available from a pick list in the **Status** field when you add a new reservation. You will be able to change the reservation's initial status, until you save the reservation.

Archiving reservations

Reservations that are completed can be transferred to the digital archive in Essentials Edition . You can modify the archived reservations by retrieving them from archive.

Whether a reservation can be archived depends on your settings and authorizations. Reservations with the following system statuses can be archived:

- Reservation administratively complete

- Reservation canceled

- Reservation in option

Reservations in this status can be archived once the date of the reservation unit expires.

To archive groups of reservations, you can use the **Action on selection** option.

> ℹ️ For more information on archiving and on the use of the **Action on selection** option, refer to Fundamentals .

> 💡 If you archive a reservation to which suborders have been added, these suborders will be archived too. If you retrieve an archived suborder, the main reservation will also be displayed automatically. If you archive a reservation to which visitors have been linked, the visitors will be archived too. Essentials Edition can only archive visitors with the status **Departed** or **Canceled**. Archived visitors are visible on the **Reservation details** > **Archived visitors** step. Note that the **Show archived items** toolbar button in the **Graphical planner** applies to archived reservation units and not to archived reservations.

> 💡 If the reservation unit linked to a mailbox is transferred to archive, then the mailbox status is set back to **In preparation**. As a result, the mailbox will no longer be subscribed and new meeting invites are not processed.

> ℹ️ For more information on mailbox subscription, refer to *Connect for Outlook - Administrator's Guide*.

Using standard reservations and orders

Standard reservations can be created for frequently used reservations. Planon administrator can define standard orders for most order types, including reservations. Standard reservations may or may not be linked to standard suborders, costs and lines (order lines, requisition lines or purchase order lines). Standard orders and reservations can be defined in Supporting data . For more information, see Supporting data documentation.

Adding a reservation based on a standard order

If you want to add a reservation that is based on a standard order (with or without suborders), there are two methods available to do so:

- You can add the standard order via the **Add standard** option from the action menu (Procedure).

- You can add a reservation and select a standard order in the **Standard order** field.

Procedure

1. Go to the **Reservations** selection level.
2. On the action menu, click **Add standard**.

The **Standard orders** dialog box opens, displaying the available standard orders.

3. Select a standard order from the list and click **OK**.

   If the standard order includes any suborders, a dialog box will appear, asking you which suborders should be added to your reservation.

4. Select the suborder(s) you want to include in your new reservation. You can also use the **Select all** or **Deselect all** buttons to include/exclude all suborders.

   By default, all suborders are included.

5. Click **Proceed**.

   You return to the **Reservations** selection level. You can enter any additional data or modify the existing data in the relevant fields.

6. Click **Save**.

   You have now added a reservation based on a standard order.

> If reservation costs are specified for the standard order, the costs will be adopted for the newly created reservation as well. If required, you can modify the reservation costs. For more information on specifying reservation costs, refer to Specifying reservation costs.

> Depending on your system configuration, adding or modifying certain default data (for example a default order group) may have an impact on other data. As with regular orders, the use of standard orders may trigger field changes, causing field values to be cleared or overwritten.

> For general information on field changes and on default data, refer to Work Orders .

Adding a suborder based on a standard order

It can be very convenient and time-saving to add a suborder that is based on a standard order to an existing reservation.

Procedure

1. Go to **Reservations** selection level.
2. Select the reservation to which you want to add a standard suborder.
3. In the action menu, select the **Add standard sub** option.
4. The **Standard orders** dialog box appears.

   In the dialog box, the **All** option is selected by default displaying all standard orders. If you select **Suborders for...** option, the standard orders related to the selected reservation are only displayed.

If you cannot find the relevant standard order in the list, use the filter bar at the top of the dialog box to narrow the results in the list. If a standard order has been added to this reservation before, it is indicated by the check mark in the **Selected?** column.

5. Select a standard order from the list and click **OK**.

6. Click **Save** to save your order.

You have now added a standard suborder to your reservation.

Adding a standard order with order lines

You can add a suborder that is based on a standard (sub) order with order lines attached. Further, you can change the number of items to be ordered or edit the order data in the order lines.

Procedure

1. Add a suborder based on a standard order.

Refer to To add a suborder based on a standard order.

2. Click **Save** to save the suborder.

The **Lines** dialog box appears, displaying the order lines which are derived from the standard order.

3. If you want to edit the data of the selected order while you are working in the **Lines** dialog box, click the icon.

The order data appear in a separate window (bearing the name of the selected order), where it can be edited.

4. In the **Quantity** field, enter the number of items you want to order.

5. When you have finished editing the order data, click **OK**.

6. In the **Lines** dialog box, verify whether you have entered the correct quantity and click **OK**.

You return to the **Reservations** selection level. The order can now be processed further.

Making a reservation recurrent

You can make a reservation recur periodically, such as daily, weekly, monthly or on specified dates. This will result in a scheduled series of reservations for the set interval.

Procedure

1. Go to **Reservations**.

2. Select the reservation you want to make recurrent.

> If an order and corresponding suborder associated with a reservation are in either the **Administratively complete** or **Canceled** status, they cannot be made recurrent. In that case, Essentials Edition will display an error message.

3. On the action panel, click **Make recurrent**.

The **Schedule** dialog box appears.

4. Select the required frequency: **Daily/Weekly/Monthly/Calendar**.
5. Select the period from **Set manually** and **Predefined**.

   If you select **Set manually**:

   ◦ Select the **Starts on** date.

   ◦ Enter either a fixed number of occurrences in **End after** field or a fixed end date in **Ends on** field.

   ◦ Select the number of days/weeks/months between consecutive occurrences.

   If you select **Predefined**:

   ◦ Select a predefined **Period** from the pick list or select the **Starts on** and **Ends on** date to select the recurrence period.

   ◦ Select the occurrences by number of days/weeks/months.

   The procedure is the same for **Weekly** and **Monthly** predefined options, except that you can additionally select the interval (weeks/months) between consecutive recurrences and the day on which the recurrence will be scheduled.

> ℹ️ For information on adding recurrence periods, see Supporting data > *Maintaining Recurrence Periods*.

> 💡 If a month has fewer days than the specified value, the reservations will recur on the last day of that month.

For a **Calendar** frequency, you can set the following:

Selected dates	Displays all the selected dates, irrespective of the day, date, month and year on which the reservation recurs.
Calendar	Select date(s) in the calendar to extend the recurrence to those dates.
Clear	Click **Clear** to delete all selected dates both in the calendar and in the list. To delete a specific date from your selection, click the date once again.
Today	Click **Today** to include today's date.

6. Click **OK** to confirm your settings.

   The **Question** dialog box is displayed.

7. Click **OK**.

> ❗ In order to be in line with *Connect for Outlook*, the number of recurrences that can be created for a reservation is limited to 100. However, if you are not using *Connect for Outlook*, the limit for the number of recurrences that can be created for a reservation at a time is 200.

You have now created recurring reservations. Recurring reservations are marked by the 🔄 icon in the elements list.

Saving and loading user settings of recurring reservations

You can save and load the user settings of recurring reservations of visitors as well as orders.

Procedure

1. To save the settings of the repeating reservations, select the **Save settings** check box at the bottom of the **Schedule** dialog box.

    The settings are saved upon closing the dialog box. The next time you open it, the saved settings will be displayed. If the **Save settings** option is selected, all settings except the start date of the recurring reservation are saved. However, if the **Calendar** option is chosen, the selected dates are also saved. If the check box is not selected, the default values are displayed.

2. Click the **Load settings** button to load the last saved user settings. It is useful if you want to display the last saved user settings while the **Save settings** check box is not selected.

> 💡 If the reservation that is made recurrent includes any suborders or visitors, Essentials Edition will ask whether you also want to make these recurrent.

3. Essentials Edition will now start creating the recurring reservations. For all recurring reservations, Essentials Edition will automatically populate the **Description** field with the description of the original reservation. If the original reservation includes reservation details such as costs, estimates and hours, these details are also copied to the recurring reservations. Where appropriate, the reservation costs are recalculated taking non-chargeable days into account.

> 💡 If for a specific recurring reservation, the reservation unit is not available Essentials Edition will display a message. You can skip this recurring reservation or modify its data. You can then select another reservation unit or another date-time for the reservation. Recurring reservations/orders/ requests obtain the status of their original reservation/order/request and the subs also behave in the same way. If the status of the original reservation/order/request is not an initial status, the recurring reservations/orders/requests obtain the system defined default status.

Modifying a recurring reservation

In **Reservations**, you can modify a recurring reservation by changing the data of one reservation and applying these changes to all future recurring reservations in the series.

Procedure

1. Go to **Reservations**.
2. Select the recurring reservation and the date from which the modification should be effective.
3. Modify the data for the recurring reservation.

4. Click **Save**.

    Essentials Edition asks whether you also want to modify future recurring reservations.

5. Click **Yes** to modify future recurring reservations.

> If you modify future recurring reservations via the **Modify within selection** option, Essentials Edition will not ask you whether you want to modify future recurring reservations.

Remarks

When modifying a recurring reservation, please note the following:

-   ◦ If one or more fields of a particular reservation in a series of recurring reservations are modified manually, a warning message is displayed (per recurring reservation).
    This warning shows the number and description of the recurring reservation and the fields that deviate from the original reservation. You have the following possibilities to:

    - Skip this recurring reservation, the next recurring reservation is continued.
    - Proceed with the modification action. In this case, the deviating fields re not modified. For any other fields that were modified, the modification will be applied to the recurring reservation.
    - Cancel the modification action. Note that any changes to recurring reservations that were already saved cannot not be undone.

-   ◦ If the reservation costs of one particular reservation in a series of recurring reservations are added or modified, Essentials Edition asks whether you want to apply these changes to future recurring reservations.

-   ◦ If the reservation times i.e., the begin or end date-time of one particular reservation in a series of recurring reservations are modified, and if visitors are linked to the reservation, Essentials Edition modifies the visiting times accordingly for future recurring reservations. Note that if different visiting times were specified originally, these are overwritten with the new reservation times.

-   ◦ If you add (or delete) visitors to one particular reservation in a series of recurring reservations, Essentials Edition asks if these visitors should be added to (or deleted from) future recurring reservations.

-   ◦ If you add a suborder to one particular reservation in a series of recurring reservations, Essentials Edition asks whether you want to make this order recur within the repeat group. Selecting **No** will not recur the suborder. However, if you want to make the suborder recur later, select **Repeat suborder within group** on the action menu.

-   ◦ If you modify or delete a suborder in a series of recurring reservations, Essentials Edition asks whether you want to modify or delete future recurring orders.

-   ◦ If you modify, add or delete order lines of a particular suborder in a series of recurring orders, Essentials Edition asks whether you want to apply these changes to future recurring orders.

-   ◦ If you modify a group of recurring reservations, Essentials Edition asks whether you want to modify future recurring reservations or not.

Changing the status of recurring reservations

In **Reservations**, you can change the status of a group of recurring reservations.

Procedure

1. Go to **Reservations**.
2. Select the recurring reservations and the date from which the status change must be effective.
3. On the action menu, select the required status.

Essentials Edition asks whether you want to modify future recurring reservations in the series or not.

For more information on available statuses, see Changing a reservation's status.

> 💡 If you modify the status of recurring reservations and sub orders via the **Action on selection** option, Essentials Edition will not ask if future recurring reservations in the series also need to be modified.
> If you modify the status of sub orders, Essentials Edition asks you whether you want to modify future recurring reservations in the series or not.

> ℹ️ For more information on **Action on selection** option, refer to Fundamentals .

Creating projects

Projects may include a wide variety of tasks: from technical activities such as renovations, to planning an annual conference including reception, lunch, presentations and drinks afterwards.

Reservations (and other orders) can be added directly to a project, but they can also be linked later.

Projects can be created in **Reservations** and **Service Manager**. In **Reservations**, you can use the **Projects** selection step on the **Graphical planner** selection level to retrieve, add, copy and delete projects.

> 💡 For more information on working with projects, refer to the Work Orders .
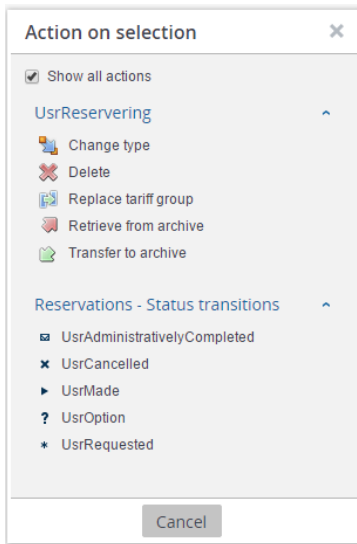
Replacing reservation tariff groups

In Essentials Edition , you can replace the tariff group associated with a reservation to recalculate the reservation cost using the new tariff. You can replace the tariff group of a single reservation directly by clicking the **Replace Tariff Group** option in the Reservations action menu. You can also replace the tariff group of several reservations that are assigned the same tariff group at one go.

Procedure

1. Go to **Reservations**
2. Select the reservations for which you want to replace tariff groups.
3. On the data panel, click **Action on Selection**.

A confirmation message is displayed stating that the selected reservations will be affected by the change.

4. Click **OK**. The **Action on Selection** dialog box appears.

5. Select **Replace Tariff Group**.

   Another confirmation message is displayed stating that the Replace tariff action will be applied to the selected reservations.

6. Click **OK**.

   The **Replace Tariff Group** dialog box is displayed.

7. In the **Replace tariff group** list, specify the tariff group to be replaced.

8. In the **By tariff group** list, specify the new tariff group you want to replace with.

9. Click **OK**.

   The original tariff group is replaced with the new one and Essentials Edition automatically calculates the reservation costs based on the new tariff.

> If you select several reservations with different tariff groups, only those reservations that are assigned the selected tariff group to be replaced have their tariff groups changed.
> The tariff groups of archived and administratively completed reservations are not replaced.

Working with the Graphical planner

The Graphical planner provides a graphical representation of reservations in Essentials Edition .
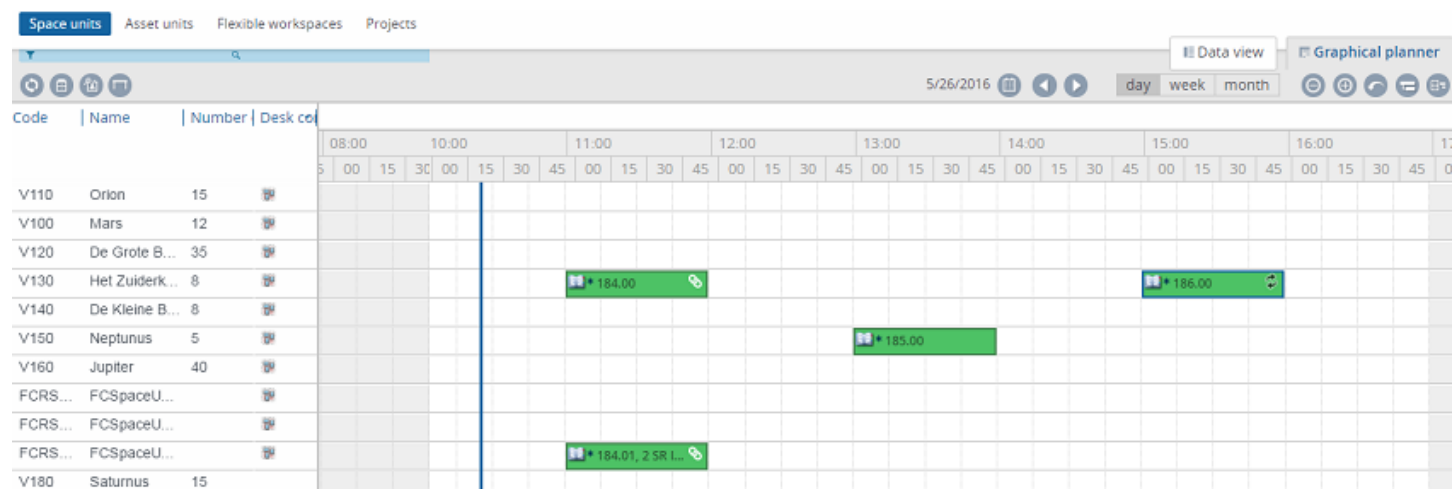
The graphical planner interface is described below:

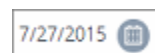| Components	Description
	The graphical planner is an interface where you can create reservations. It has a time scale at the top and reservation units on the left. The time scale changes depending on the day/ week/ month view selected. Working and non-working hours are displayed in white and gray colors respectively. 💡 working and non-working hours are defined in the company calendar.
	These buttons enable you to toggle between the graphical planner and the data view. By default, the graphical planner view is displayed.
	This button enables you to select a reference date, to view the reservations available on that date. By default the current date is selected.
	These buttons enable you to select a day/ week/ month view. The graphical planner displays reservations based on the period selected.
	These buttons enable you to zoom in and zoom out. The **Reset** zoom button enables you to return to the default view.

Components	Description
	⚠ Please be aware that the Graphical component does not support browser zooming. Make sure your browser zooming level is set to 100%.
	The **Suborders** button enables you to show/hide the suborders made on a reservation. The suborder icon and suborder name are displayed on the graphical planner.
	The **Show archived reservations** button enables you to show/ hide archived reservations. If you show archived reservations, they are displayed along with active reservations on the graphical planner.
	The link icon is displayed: • If a reservation has suborders or subreservations. • If the reservation itself is a subreservation.
	The **Search** and **Filter** bar is minimized and is displayed at the top of the element list. If you click the bar, it expands and enables you to search and filter the available reservation units.

💡 The graphical planner does not support browser zooming. Zooming can affect the functionality of the graphical planner, such as not being able to move items.

Adding reservation units to the Graphical planner

You can add reservation units, such as space units, asset units and flexible workspaces, on the **Graphical planner** tab. Subsequently, you can add reservations for them.

Procedure

1. Go to **Graphical planner** > **Space units / Asset units / Flexible workspaces**.
2. Select the **Data view** tab.
3. Click **Add** on the action panel.
4. In the data section, enter data in the relevant fields. For a description of generic reservation unit fields, see Reservation unit fields.

   For a description of specific **Space unit / Asset unit / Flexible workspaces** fields, see:

   ◦ Space unit fields

   ◦ Asset unit fields

   ◦ Flexible workspace fields

5. Click **Save**.

You have now added a reservation unit. You can also copy, delete or archive reservation units.

Specifying a standard desk configuration

For each space unit, you can specify one or more desk configurations in Supporting data , for example: Circle, Rows or Square. In **Reservations**, one of these desk configurations can be specified as the standard desk configuration.

If you use the graphical planner to find space units with a specific desk configuration, by default only space units with standard desk configuration are displayed. However, you also have option to display alternate desk configurations. For more information on desk configurations, refer to Finding space units by desk configuration.

> For more information on defining and maintaining desk configurations, see Supporting data .

Procedure

1. Go to **Graphical planner** > **Space units**.
2. Select the space unit for which you want to specify the standard desk configuration.
3. Go to the **Data view** > **Desk configuration** field to select a value.

   The **Desk configuration** window opens.

4. Select the required desk configuration and click **Save**.

This desk configuration is now set as the standard desk configuration for the selected space unit.

Linking a non-bookable period to a reservation unit

You can link a non-bookable period to one or more reservation units to limit the use of the selected reservation unit(s) for a fixed period of time.

1. Go to **Graphical planner** > **Space units**
2. Select the reservation unit for which you want to specify a non-bookable period and go to **Data view**.
3. On the action panel, click **Link non-bookable period**.
4. In the **Non-bookable period** dialog box, select the non-bookable period.

   Non-bookable periods can be defined in Supporting data . For more information, see Supporting data > *Non-bookable period for reservation units*.

5. Click **OK**.

   The non-bookable period is now linked to the reservation unit(s).

Adding a reservation in the Graphical planner

You can add reservations for all reservation units on the graphical planner. The procedure for adding a reservation is the same for all reservation units. Reservations can be added in any period view (day, week, month).

Procedure

1. Go to **Graphical planner** > **Space units / Asset units / Flexible workspaces**.
2. Select the relevant reservation unit.

   Point to the required start time on the graphical planner. A date-time tooltip is displayed as you start hovering the cursor over the graphical planner.
3. Click while pressing down the left mouse button and drag the cursor to the required end time.

> ⚠️ If you make a selection for non-working hours, an alert is displayed, stating that the reservation is outside the defined working hours. The working and non-working hours of a reservation unit are determined by the Calendar. Non-working days / hours are displayed against a gray background in the graphical planner.

> 💡 Non-bookable periods are also displayed in a gray color on the graphical planner. If you try to create a reservation during non-bookable period, an error is displayed. For more information on non-booking periods, see Supporting data .

4. Release the left mouse button. The **Add reservation** dialog box appears.
5. Enter data in the relevant fields.

   For a description of these fields, see Reservation fields.
6. Click **OK**.

   The reservation for the selected time is displayed on the graphical planner:
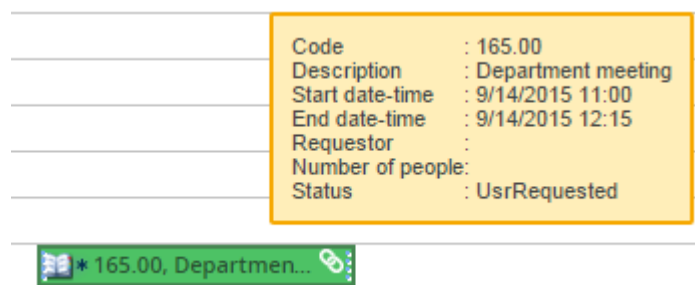
> ℹ️ You can configure the text displayed on the reservation bar of the graphical planner. For more information, refer to Specifying text on the bars of the graphical planner.

By hovering the mouse over the reservation, you will see details such as the start/end date-time, requestor and number of people. The link icon indicates that the reservation has subreservations / suborders.

> 💡 Double-click the reservation if you want to view / modify it. For more information, see Modifying a reservation in the graphical planner.

Specifying colors for the bars of the graphical planner

You can assign various colors to the reservation bars on the graphical planner based on the following properties:

- System status of reservation
- User-defined status of reservation
- User-defined reservation type

Procedure

1. Go to **Reservations planboard - colors** > **Reservation planboard - colors**.
2. On the action menu, click **Add**.
3. Select any one of the following fields:
   - **System status of reservation**
   - **User-defined reservation**
   - **User-defined status of reservation**
4. Specify a color in the **Color** field for the selected field.
5. Click **Save**. The selected color is considered the main color.
6. Click **Add sub** on the action menu to add a subcolor to the main color. Add a color to any one of the two available reservation statuses.
   - If a status color is defined as a main color, the rest of the main planboard colors must also be defined for the same status type. The same applies to substatuses. You have to stick to a the chosen hierarchy when adding a main and sub colors. For example: if you select to add a main color for a user-defined reservation, you can select subcolors for system statuses of a reservation or user-defined statuses of a reservation. If you select a sub color for a system status of a reservation , you can only continue to select main colors for user-defined reservations and sub colors for system statuses of a reservation.
   - If a main color is created for a user-defined reservation status, you cannot add a system status of reservation as sub.
   - If a main color is defined for a system reservation status, you can only select the user-defined statuses for subcolors that were defined for the system status of the main planboard color.

The selected colors are applied to the bars displayed on **Reservations** > **Graphical planner**, if the reservation is moved to that particular corresponding status.

Specifying a default color for the bars of the graphical planner

You can assign a default color to the bars representing the reservations on the graphical planner.

1. Go to **Reservations planboard - colors** > **Reservation planboard - color settings**.

2. On the action menu, click **Add**.

3. Specify a color in the **Color** field.

4. Click **Save**.

   The selected color is given by default to all the bars on the graphical planner.

Specifying text on the bars of the graphical planner

You can specify text on reservation bars and order units in the graphical planner by referencing a data only report.

 Procedure

1. Go to **Reservations**.

2. On the action menu, click **Report** to create a report for the reservations and the suborders of the element list.

   The **Reporting** dialog box appears.

> For more information on creating data only reports, see Reports .

3. Select the **User reports** tab.

4. On the action menu, click **Add**.

   The **Report definitions and settings** dialog box appears.

5. Select the **Data only** option in the **Type** drop down list.

6. In the **Name** field, specify a name for the report.

7. In **Available fields** pane, select the fields whose information you want to display on the reservation units' bars. For example, select **Start date & time**.

   Click **OK**.

8. Click **Close**.

> To be able to view the report's information on the activity bars, you must select the report in Field definer .

> For more information on selecting the **Data only** reports created in Reservations, see **Making settings for specific business objects > Reservations** section in Field definer .

9. When the configuration in Field definer is completed, return to **Reservations** > **Graphical planner** level.

   The text from the report will now be visible on the reservation bars in the Graphical planner.

Creating compound reservation units

You can create a compound reservation unit by linking multiple reservation units. For more information on compound reservation units, see Compound reservation units.

> 💡 You cannot create a compound reservation unit if there is a reservation for the selected reservation unit with one of the following statuses: **Requested / Made / Option**.

Procedure

1. Go to **Graphical planner** > **Space units / Flexible workplaces**.
2. Select the **Data view** tab.
3. Select the reservation unit to which you want to link another reservation unit, to create a compound reservation unit. This unit will be the parent of the compound reservation unit.
4. On the **Links** action menu, click **Reservation units**.
   The **Reservation units** dialog box appears.
5. Select the required reservation units (space units, asset units or flexible workspaces) and move them to **In use**. If your main reservation unit is a flexible workspace, it can only be linked to asset units. These units will become the child units of the compound reservation unit.
6. Click **OK**.

   A compound reservation unit is now created.

> 💡 You cannot modify a compound reservation unit after a reservation has been created for it.

Setting a transition period for a reservation unit

A transition period is the buffer time before and after a reservation. During this time the reservation unit will not be available.

Procedure

1. Go to **Graphical planner** > **Space units / Asset units / Flexible workspaces**.
2. Select the reservation unit for which you want to set a transition period.
3. Select the **Data view**.
4. In the **Transition period in minutes** field, enter a value in minutes.

   The value specified here is considered as the changeover time before and after the reservation.

   For more information on transition period, see Transition period.

5. Click **Save**.

   You have now set the transition period for a reservation unit.

   The following image displays the transition period of a reservation unit in the graphical planner.
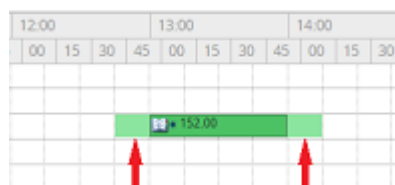
> 💡 If a space unit is part of a compound reservation unit, the transition period of the unit on which the reservation is made is considered in determining if the unit is available for creating a reservation.

Available actions in the graphical planner

In the graphical planner, you can perform the same actions as on the **Reservations** selection level. After you have selected a reservation in the graphical planner, double-click the reservation to access the available actions via the shortcut menu.

For more information on the actions, refer to the following links:

- Replacing reservation tariff groups
- Specifying reservation costs
- Adding visitors to a reservation
- Adding suborders to a reservation
- Making a reservation recurrent
- Archiving reservations
- Changing a reservation's status

Modifying a reservation in the graphical planner

In the graphical planner you can easily modify the data of a reservation that has already been added.

Procedure

1. Retrieve the reservation you want to modify.
2. Double-click the required reservation to modify the data.

The **Reservation data** window is displayed, allowing you to modify the reservation data.

Modifying the start and end time of a reservation

It is possible to modify the start and end time of a reservation, if, for example, the meeting for that reservation starts earlier or later than originally planned. The start and end time of a reservation can easily be modified in the graphical planner.

If the reservation is moved to another time and suborders are present, these suborders are modified accordingly. If visitors are linked to the modified reservation, the visiting times will be adapted to the new reservation times.

Procedure

1. In the graphical planner, select the reservation for which you want to modify the start and/or end time.
2. Modify the start time by dragging the reservation's left border to the left for an earlier start time or to the right for a later start time.

   Or

   Modify the end time by dragging the reservation's right border to the left for an earlier end time or to the right for a later end time.

   Or

   If you want to move the reservation to another start and end time, just simply drag it to the required time.

You can also modify the start and end time of a reservation via the **Start date-time** and **End date-time** fields in the **Reservation data** window.

Searching available reservation units

You can find available space units, asset units and flexible workspace units via the **Graphical planner, CAD Integrator** or **Data view** mode.

Procedure

1. Go to **Graphical Planner** > **Space units / Asset units / Flexible workspaces**.
2. On the element list toolbar, click the **Search available reservation units** button. The **Search available reservation units** dialog box appears.
3. Select the **Available** option in the dialog box.
4. Select a date-time in the **From** and **Until** fields to see the available reservation units in the selected period.
5. Click **OK**.

   A list of available reservation units is displayed in the element list.

You can end the search by clicking the **All (end search)** option in the dialog box.

Finding space units by desk configuration

Desk configurations may vary, depending on the occasion for which they are used. For example, a presentation often requires chairs in rows, whereas for meetings a square-shaped desk arrangement may be preferred.

Space units with a default desk configuration are marked with the ⊞ icon on the Graphical planner.

For more information on linking default desk configurations to space units, refer to Specifying a standard desk configuration.

> ℹ️   For more information on defining and maintaining desk configurations, refer to Supporting data .

Procedure

1. Go to **Graphical planner** > **Space units**.
2. On the elements list toolbar, click the **Filter on desk configuration** button. A drop down is displayed with the available desk configurations.
3. Select the required desk configuration type.

   Select the ⊞**Show alternative desk configurations** check box to display space units that have the specified desk configuration as an alternative. On the Graphical planner, the filtered results on desk configuration will display different icons to indicate whether the desk configuration is default or alternative.

   The space units with the selected desk configuration are displayed.

Searching for flexible workspaces

You can search for flexible workspaces that are reserved by a particular person during certain time interval.

Procedure

1. Go to **Graphical planner > Flexible workspaces**.
2. On the element list toolbar, select **Search flexible workspaces**.

   The search dialog box is displayed.

3. In the **Requestor** specify the requestor name. In the **Start date** and **End date** fields, provide the dates on which the reserved flexible workspaces must be searched.
4. Click **OK**.

   Planon ProCenter displays the flexible workspaces reserved by the requestor and for the specified dates.

Generating QR codes for flexible workspaces

It is possible to generate **QR codes** for one or more flexible workspaces. These QR codes can be scanned by Planon mobile apps users to claim a workspace.

> 💡 The **Generate QR code** option is located on the action panel and is only available if a workspace is selected.

Procedure

1. Go to the **Graphical Planner** > **Flexible Workspace**.
2. From the list of flexible workspaces, select one or more workspaces for which you want to generate a QR code.

   If multiple items are selected, different QR codes are created for different workspaces.
3. Click on the **Generate QR code** button. The following screen appears:

4. Set the **Error Correction** level either to **Low**, **Medium**, **Quartile** or **High**.

> 💡 It is recommended to select **Medium**, because codes generated at the medium level can be scanned faster by the apps and are suitable for office environments.
> If there is a need to create QR codes for industrial places, select the **High** error correction level. This allows codes to be scanned even if they are partly covered. The scanning, however, will be slower if this setting is used.

5. Select the **Include code in QR** option if you want to include the code in the image. Select this option only if it is necessary, as the code will be included in the file name of the image anyway.

It is not recommended to select the **Include code in QR** option, as the dimensions of the image will be disturbed when the code number is included.

6. Click the **Download** option to generate the QR code(s).

A folder named *QRcodes.zip* is downloaded. Extract the files from the *.zip* file to view the generated codes.

The generated codes are stored in *.png* format and are transparent. It is not possible to choose a different file extension.

A generated QR code looks like this:

Reporting in Reservations

Essentials Edition includes a tool that can be used to create, edit, and print reports: Report Manager. You can access Report Manager from within the action menus in **Reservations**. After clicking the **Report** option in the action menu, the **Reporting** window opens. This window includes a **User reports** tab and, in specific places in **Reservations**, a **System reports** tab.

The **User reports** tab provides access to functionality with which you can create your own report definitions.

> ℹ️ For details on creating user report definitions, refer to Reports .

The **System reports** tab provides access to system reports that are preprogrammed for **Reservations** by Planon. You cannot modify a system report's design, but you can make several settings concerning the presentation and output of a system report.

Reservation unit occupancy

Space unit occupancy

In the **Reservation unit occupancy - spaces** report the occupancy of the reservation units within a defined period and time is shown. Both the occupancy in hours as with respect to the capacity (persons) can be shown.

You can access the **Reservation unit occupancy - spaces** report via the **Graphical planner** > **Space units** and on the action menu, click **Report**.

1	Number of reservations within the specified reporting period
2	Available hours: total number of hours within the specified reporting period
3	Reserved hours: total number of reserved hours of all reservations that fall in the specified reporting period
4	Occupancy percentage in hours: this percentage is calculated as - Reserved hours/Available hours * 100%
5	Available persons: maximum number of people the space unit can hold
6	Reserved persons: total number of people for which the reservation is made
7	Occupancy percentage persons: this percentage is calculated as - Reserved persons/Available persons * 100%
8	Total occupancy percentage: this percentage is calculated as - (Occupancy percentage in hours) * (Occupancy percentage persons) * 100%

Report settings for the space unit occupancy report

In the **Reporting** window, click the **Edit report settings** option to open the **Report settings - Space unit occupancy** window. Here you can make following settings.

> The Planon administrator can configure the layout of this **Settings** dialog box in TSIs > Layouts . For details on configuring layouts, see TSIs documentation.

Grouping

In the **Main grouping** field you can specify how to group the reservation units in the report.

The **Subgrouping** field can be used to make a subdivision in the classification selected in the **Main grouping** field.

Reporting period

Set the reporting period by specifying the **Reservation period from** and **Reservation period up to & incl.** fields.

Use company calendar

Set this option to **Yes** if you want to use the company calendar.

> For details on defining company calendars, refer to *System Settings*.

If the **Use company calendar** option is set to **No**, the **Calculate occupancy on..** fields and the **Reservation start time** and **Reservation end time** fields become available, allowing you to specify individual days for which you want to calculate the occupancy in your report.

Display individual reservations

Set this option to **Yes** if you want to display the individual reservations in your report.

Display occupancy of personnel

Set this option to **Yes** if you also want to display the occupancy of persons in your report.

Title

The field **Title** allows you to specify your own title for the report. If you leave this field empty, the default Planon-defined title "Reservation unit occupancy: spaces" is used. If you specify your own title, this title will be used instead of the Planon-defined title.

Subtitle

The field **Subtitle** allows you to specify a subtitle for the report.

Show table

Set this option to **Yes** to include a data table for the occupancy in your report.

Occupancy per unit (bar chart)

Set this option to **Yes** to add a chart to your report of the occupancy per reservation unit.
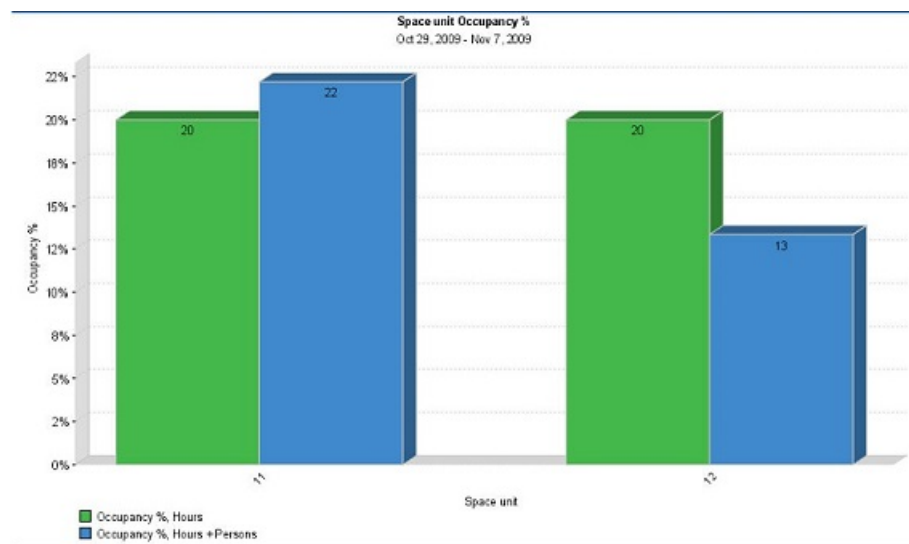
Vacancies per unit (bar chart)

Set this option to **Yes** to add a chart to your report of the vacancy per reservation unit.
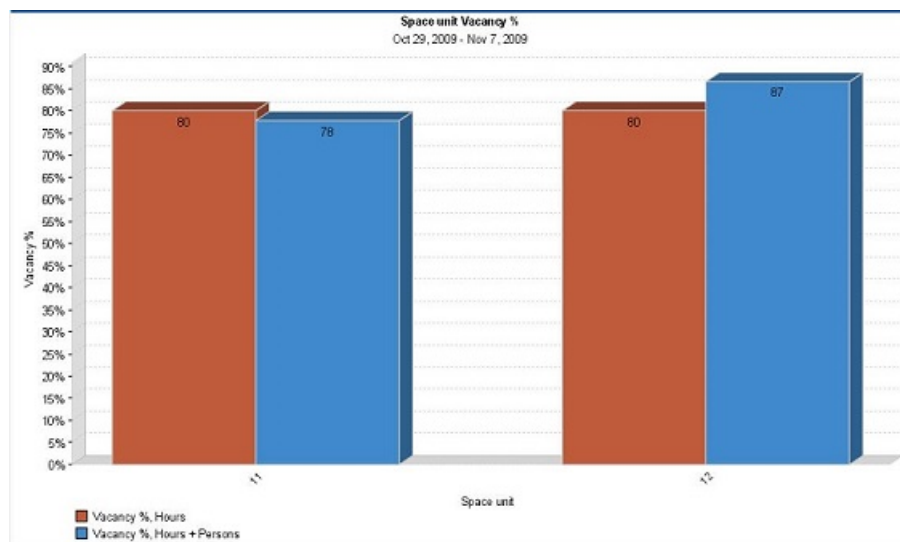
Occupancy per month, per unit (line chart)

Set this option to **Yes** to add a chart to your report of the occupancy per reservation unit, per month.
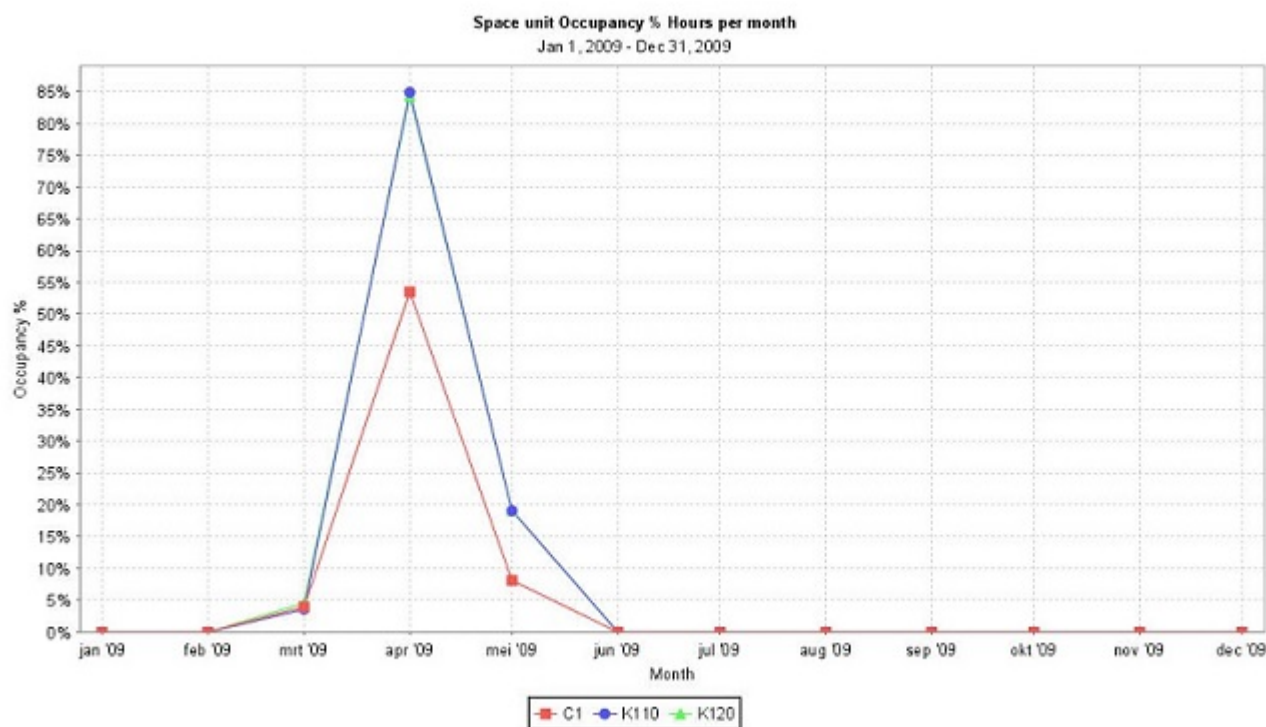
Asset unit occupancy

In the **Reservation unit occupancy - assets** report, the occupancy of asset units within a defined period and time is shown.

In **Reservations**, to access the **Reservation unit occupancy - assets** report, go to **Graphical planner** > **Asset units** and on the action menu, click **Report**.

For an explanation about the asset unit occupancy report, see Space unit occupancy.

For the available report settings, see Report settings for the space unit occupancy report.

Flexible workspace occupancy

In the **Reservation unit occupancy - flexible workspaces** report the occupancy of the flexible workspaces within a defined period and time is shown.

You can access the **Reservation unit occupancy - flexible workspaces** report via the **Graphical planner** > **Flexible workspaces** and on the action menu, click **Report**.

For an explanation about the Flexible workspace occupancy report, see Space unit occupancy.

For the available report settings, see Report settings for the space unit occupancy report.

Reservations - Field Descriptions

Reservation fields

Fields	Description
User order type	The system definition of the business object concerned (reservation).
Status	The system status of the reservation.
Number	In this mandatory field, Essentials Edition will automatically generate a number.
Standard order	If you want to add a standard reservation, you can select it from a pick list in this field. For more information on using standard reservations, refer to Using standard reservations and orders.
Booked by	Displays the person who actually booked the reservation. The person can for example be a secretary booking on behalf of his/her manager. In this case, the manager will be the requestor.
	For more information on reservation using Microsoft Exchange clients such as Outlook / Web Access, see *Connect for Outlook – User's Guide*.
Requestor	The requestor is the person who has requested the reservation. A requestor can be selected from a pick list containing people from Personnel .
Internally assigned by	Select the internal person that assigned the order.
External requestor	In this field you can open the **External requestors** window by clicking the selection button. In this window you can include people in the list of external requestors. The data will be saved so that newly entered requestors can be selected.
Start date & time	Specify the start date-time of the reservation.
End date & time	Specify the end date-time of the reservation.
	For reservations created by *Exchange*, the end date-time of a reservation can be shortened when the reservation completes early so that the room can be made available again. To enable this, the setting **Allow shortening of reservations made by Exchange?** must be set to **Yes**. For more information on the setting, see Field Definer > Reservations - Order settings.
Property	The property the reservation refers to. The required property can be chosen from a pick list containing all properties registered in Essentials Edition .

Fields	Description
Reservation unit	Select a reservation unit from the 'Space units', 'Asset units' or 'Flexible workspaces' tab. You can also filter on the following options: **All**: all reservation units are displayed. This is the default setting. **Property**: only the reservation units of a specific property are displayed. **Complex**: only the reservation units of a specific complex are displayed. Select the **Show available reservation units from...to** check box to retrieve the available reservation units within the filtered list of reservation units.
Number of people	The number of people for whom a space unit is booked.
Selected desk configuration	This field is automatically populated if a desk configuration is specified for the reservation unit. It is also possible to modify the suggested desk configuration via a pop-up containing all possible configurations for the reserved space. For each space unit, you can specify one or more desk configurations in Supporting data . For more information, see Supporting data . > 💡 This field is populated with the type of desk configuration that is selected in the 'Type' 🗔 filter.
Space	The space to which a reservation applies. A pick list is available for this field, containing all spaces from Spaces & Workspaces .
Asset ID	The asset to which a reservation applies. The asset can be selected from a pick list containing all assets registered in Technical assets .
Order group	The order group that applies to a reservation unit. This field is automatically completed after you have completed the **Reservation unit** field. The order group can be modified manually. Note: the various orders such as work orders and reservations can be found by order group in Work Orders .
Project	In this field you can select one of the available projects from a pick list. For more information on creating projects, refer to Work Orders .
Approved by	The person who has to authorize the reservation. For this field a pick list is available, containing people from Personnel .
Budget	The budget to which the reservation costs are booked. The budget can be selected from a pick list containing all budgets registered in Budgets .
Department	The department to which the reservation applies. A department can be selected from a pick list.
Internal coordinator	The person in the organization responsible for completion of the order can be selected in this field. For this field a pick list is available, containing people from Personnel .
External tradesperson	If an order is completed by an external tradesperson, the responsible tradesperson can be specified in this field. A pick list is available, containing the external tradespersons registered in Addresses .

Fields	Description
Internal tradesman	In this field you can specify the employee responsible for carrying out the order. For this field a pick list is available, containing people from Personnel .
Contract	This field specifies the contract linked to the reservation. A contract can be selected from a pick list.
Cost center	Here you can enter the cost center for the reservation. There is a pick list available for this field.
Created by	The name of the person entering the reservation, if this person is logged on to the system under a valid user name.
Asset group	Information on the asset group to which the asset specified in the **Asset ID** field belongs. The contents of the field cannot be modified.
Trade	In this field, you can link the order to a specific trade, which can be selected from a pick list.
Recurring reservation	The number and description of the original reservation for a recurring reservation. For more information on recurring reservations, refer to Making a reservation recurrent.
Reported on	In this field the date and time when the reservation is added is automatically specified.
Quotation date	This field specifies the date and time on which a reservation is given the **Reservation made** status. The system date and time are copied by default. These values can be modified manually.
Date accepted	This field specifies the date and time on which a reservation is given the **Reservation administratively complete** status.
Booking utilized	Indicates weather the booking (reservation) of a room is utilized or not. The following statuses are available:

Booking utilized (continued):

- **No (no show)** - The reservation's start time has passed and no attendees appeared within the specified time frame.
- **Unknown** - The reservation's status is unknown.
- **Yes** - The reservation is in progress.

> 💡 This field can be automatically filled by using an action definition in Alerts .

If you use the **Room booking panel** to create a reservation for the meeting room, and if the requestor/attendee does not 'check in' within the **No-show time offset period**, the reservation is canceled and the **Booking utilized** field is set to **No (no show)**.

Fields	Description
	💡 To enable the **Booking utilized** feature, you must select the relevant settings in Field definer > Orders > Business object settings > Reservations tab > Booking utilized.

Reservation status fields

Status	Description / effect
Reservation option	A reservation that is not yet definite can be given the **Reservation option** status. The reservation data can still be modified at this stage. For the duration of the Reservation option, the unit is not blocked. Hence, another reservation on the same unit can still be created.
	If you have purchased Budgets :
	Estimated costs will not be deducted from the available budget in this status. The actual costs cannot be added to a reservation with this status.
Reservation requested	This can be treated as an intermediate approval status. In this status, the reservation is created and the room is booked.
	If you have purchased Budgets :
	If you have entered the actual costs, these will be deducted from the available budget. Estimated costs will not be deducted from the available budget in this status.
Reservation made	A reservation created successfully is in this status.
	If you have purchased Budgets :
	This is the moment the latest estimated costs are deducted from the budget. If the actual costs and the man-hour costs exceed the latest estimated costs, the actual costs and the actual man-hour costs are deducted from the budget instead of the latest estimated costs.
Reservation administratively complete	A reservation which is completed successfully is given this status.
	If you have purchased Budgets :
	This is the moment that the actual costs and man-hour costs are deducted from the budget instead of the latest estimated costs.
Reservation cancelled	A reservation which is no longer required is moved to canceled status. After cancellation, the room will immediately be available again for reservation.
	If the status of a reservation for which reservation costs have been specified, is changed to **Cancelled**, the **Reservation costs** window will open automatically. Subsequently, a cancellation date and cancellation fee can be specified in the cancellation section. For more information, refer to Specifying reservation costs.

Status	Description / effect
	If you have purchased Budgets :
	Any estimated costs given for a reservation are no longer deducted from the budget. The actual costs and man-hours however will continue to be deducted from the budget.

Reservation unit fields

Field	Description
Property	Select the property to which the reservation unit belongs. This field is mandatory.
Code	Displays the code of the selected reservation unit.
Name	Displays the name of the selected reservation unit.
Comment	Allows you to add a comment regarding the selected reservation unit.
Tariff group	Select the tariff group you want to link the reservation unit to.
Calendar	You can link reservation units to a company calendar in order to define the opening hours. This field is not visible by default.
	If the reservation units are linked to a company calendar, the working days and hours from that calendar also apply to any linked orders (reservations, work orders, requisitions etc.).
	For more information on configuring and activating a default company calendar, see Supporting data and *System Settings*.
Transferred to archive	This field indicates whether or not a reservation unit is transferred to the digital archive.
Num. of advance reservation days	Allows you to enter the number of working days a reservation unit can be reserved in advance.
	Note that working days are determined on the basis of the applicable company calendar.
	For more information on defining company calendars, see *System Settings.*

Field	Description
	For example, If the **Num. of advance reservation days** option is set to zero, and Monday to Friday are defined as working days, the following scenarios are possible: • A reservation for Monday that was made on Saturday is allowed (Saturday and Sunday are holidays). • A reservation for Tuesday that was made on Saturday is not allowed (one working day in advance). • A reservation for Monday that was made on Monday is allowed (same day reservation). • A reservation for Tuesday that was made on Monday is not allowed (one working day in advance).
Max. num. of reservable days	Enter the maximum number of working days a reservation unit can be reserved for.
Transition period in minutes	Specify the time frame (in minutes) before and after a reservation that the reservation unit is not available. A transition period may be required, for example, if the reservation unit must be cleaned. For more information on setting a transition period, refer to Setting a transition period per reservation unit.

Space unit fields

Field	Description
Start date-time	Enter the start date-time for the space unit. This is the date on which the space unit is registered in Planon, not the start date-time of any reservation of this space unit.
End date-time	Enter an end date-time for the space unit.
	⚠ The **Start date-time** and **End date-time** are not taken into account when creating a reservation.
Space unit category	Select a space unit category from the list. For example a conference room, workplace or a parking space.

Field	Description
	💡 You can maintain the items displayed in the pick list in the **Basic data**. Go to Supporting data > **Pick lists**, select RESEENHSRT from the elements list and go to **Pick list items**. ℹ️ For more information, see Supporting data .
Space	In this field, select the space you want to classify as reservable space unit.
Facilities	Allows you to select the fixed facilities in the selected space unit.
Order group	Allows you to specify the order group to which the reservation of a space unit applies.
Max. no. of people	Allows you to enter the maximum number of people a space unit can hold.
Desk configuration	Select the standard desk configuration in a space unit. For each space unit, you can specify one or more desk configurations in Supporting data . For more information on defining and maintaining desk configurations, refer to Supporting data .
Tariff group	Allows you to select the tariff group you want to link the space unit to.
Actual number of people	Allows you to enter the actual number of people a space unit can hold. The number may vary from the maximum number of people a space can hold, because a compound space unit may consist of several reservation units.
Compound space Y/N	This field is automatically updated to **Yes** if the space unit is the parent in a compound reservation unit.
Reservation unit components	Displays the code and name of any linked reservation unit(s).

Asset unit fields

Field	Description
Start date-time	Enter the start date-time for the asset unit. This is the date on which the asset unit is registered in Planon, not the start date-time of any reservation of this asset unit.
End date-time	Enter an end date-time for the asset unit.

Field	Description
	💡 The **Start date-time** and **End date-time** are not taken into account when creating a reservation.
Property	Select the property to which the asset unit belongs.
Classification group - asset	Specify the classification group to which the asset unit belongs. For example, video projectors, computers and so on. This field is mandatory.
Asset	Specify the asset you want to reserve.
Tariff group	Specify the tariff group you want to link the asset unit to.
Order group	Specify the order group to which the reservation of the asset unit belongs.
Transfer to archive	This field indicates whether or not an asset unit is transferred to the digital archive.

Flexible workspace fields

Field	Description
Start date-time	Enter the start date-time for the flexible workspace. This is the date on which the flexible workspace is registered in Planon, not the start date-time of any reservation of this flexible workspace.
End date-time	Enter an end date-time for the flexible workspace.
	💡 The **Start date-time** and **End date-time** are not taken into account when creating a reservation.
Available area	The available area of the flexible workspace.
CAD Integrator symbol name	Select a symbol (*.orj file) to represent the flexible workspace in CAD Integrator drawings. For more information on flexible workspaces in CAD Integrator, refer to *CAD Integrator*.
Floor	This read-only field displays the floor on which the flexible workspace is located.
Space	Select the space location of the flexible workspace.
Asset	Select an asset to link to the workspace.
Facilities	Allows you to select the fixed facilities in the selected workspace.

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