

# Planon reporting

## Guide for Room Stewards

July 2019



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

- A report listing all the reservations in one room, or a group of rooms, on a given day;
- A report on the hours occupied in a room, or group of rooms, across a day, week, or month;
- A summary of moderated room bookings, showing the number of requests accepted or rejected;
- A report showing all the moderated booking rejection reasons.

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

- 1) To create this report, navigate to the “Graphical planner” and set up a filter for the group of rooms to be reported on (see the Room Data guide for room stewards for details of how to setup filters).
- 2) Next navigate to the “Reservations” screen. Create a new filter on the “Start date & time” and select the relevant date. Click OK.
- 3) Click the “Report” button from the right-hand menu.

2)

Select filter criteria

Filter name: May report

Group AND Group OR Ungroup

AND Start date & time Between 18/04 18/05

Preview changes OK Cancel

3)

Core - Reservations

Properties Floors & spaces Graphical planner Multiple items selected Reservations Reservation details Reservation subdetails

Reservations Exchange mailbox Lost Exchange subscriptions

May report

Created by

Orders (3)

- 39716.00, testing moderated rooms (18/05/2018 17:00)
- 39670.00, Really long booking (18/05/2018 12:00)
- 39663.00, made in outlook (18/05/2018 11:00)

Orders

- Add
- Add sub

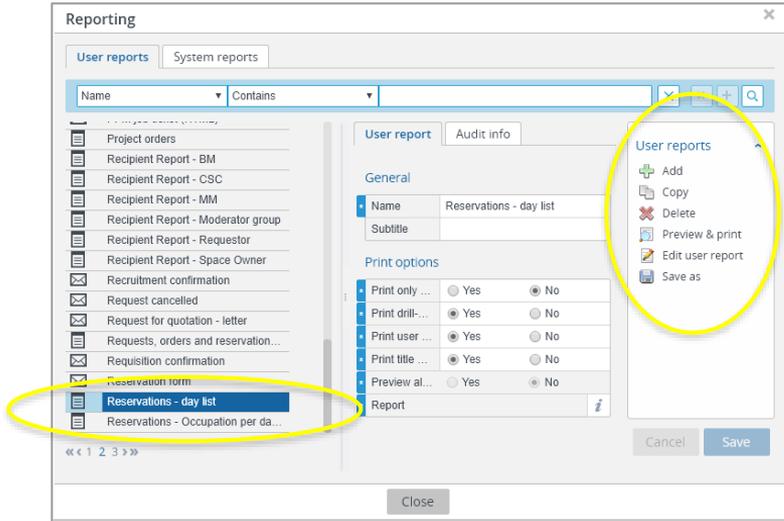
Links

- Link related records

Report

Report

## Reporting – reservations in one day



4) In the Reporting window, select “Reservations – day list”

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

a)

Reservations - day list						
Time	Name	Description	Requestor	Tel.	Res.no.	Comment
<b>FRIDAY 16 MAY 2018</b>						
12:00 - 01:00	CAGB-07-765 (18), restricted, moderated	Really long booking	Nichols		39670.00	
05:00 - 06:00	CAGB-07-765 (18), restricted, moderated	long booking Really long booking	Cabraal	020 7594 7388	39716.00	
11:00 - 11:30	CAGB-07-765 (18), restricted, moderated	testing moderated rooms	Kamaraj	020 7594 7276	39863.00	
		made in outlook				

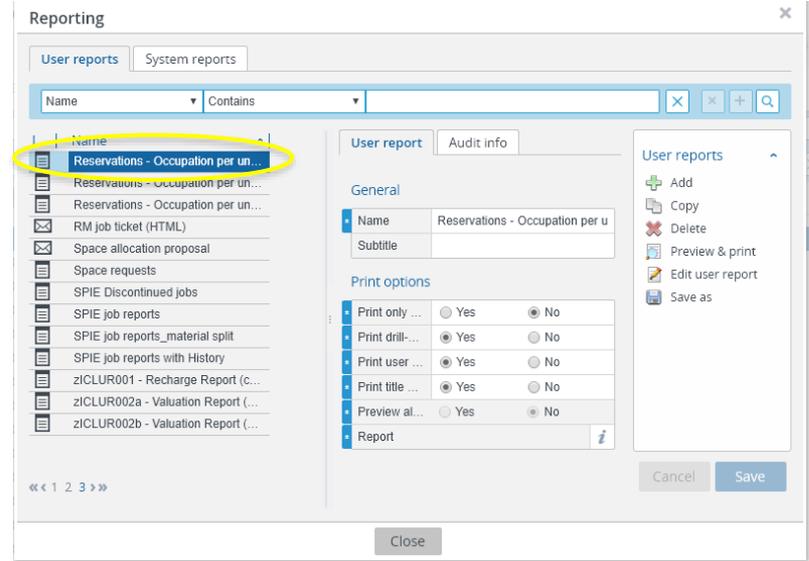
b)

Time	Name	Description	Requestor	Tel.	Res.no.	Comment
<b>FRIDAY 16 MAY 2018</b>						
12:00 - 01:00	CAGB-07-765 (18), restricted, moderated	Really long booking	Nichols		39670.00	
05:00 - 06:00	CAGB-07-765 (18), restricted, moderated	long booking Really long booking	Cabraal	020 7594 7388	39716.00	
11:00 - 11:30	CAGB-07-765 (18), restricted, moderated	testing moderated rooms	Kamaraj	020 7594 7276	39863.00	
		made in outlook				

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

- 1) To create this report, navigate to the “Graphical planner” and set up a filter for the group of rooms to be reported on (see Room Data guide for room stewards).
- 2) Click the “Report” button from the right-hand menu.
- 3) In the Reporting window, select **“Reservations – Occupation per unit per month in hours”**
- 4) Print your report or save as an excel file to edit further.

3)



**Reservations - Occupation per unit per month in hours**

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

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

- 1) To create this report, navigate to the “Graphical planner” and set up a filter for the group of rooms to be reported on (see page 19 for how to set up a filter for moderated rooms).
- 2) Next navigate to the “Reservations” screen. Create a new filter on:
  - a) “Start date & time” - select the dates to be covered in the report. In this example the month of May 2018 has been selected
- 3) Click the “Report” button in the right-hand menu. In the Reporting window, select “**ICL052 – Summary of moderated room reservations**”

2)

Select filter criteria

Filter name: May report (2)

Group AND Group OR Ungroup

AND Start date & time Between 01/01 31/01

3)

Reporting

User reports System reports

Name Contains modera%

...	Name
✉	ICL032 - Creation of Moderated room reservation
✉	ICL033 - Reservation needs moderation
✉	ICL036 - Reservation needs moderation reminder
✉	<b>ICL052 - Summary of moderated room reservations</b>
✉	Recipient Report - Moderator group

User report Audit info

General

Name ICL052 - Summary of mod

Subtitle

Print options

Print on...  Yes  No

Print dri...  Yes  No

Print us...  Yes  No

Print titl...  Yes  No

Previe...  Yes  No

Report

Cancel Save

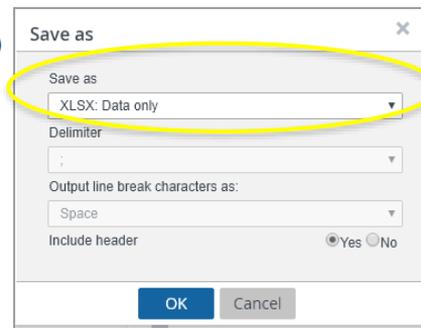
Exporting your report:

- 1) The report will generate a list of every booking in each room over your selected time period and whether it was “Confirmed”, “Declined” or still “Awaiting approval”.
- 2) To view a summary of the total number of confirmations, declinations or requests awaiting approval, it is recommended that the report is downloaded to Excel. To do this click “Save as” and change the file type to “XLSX: Data only”.
- 3) In Excel, [create a pivot table](#) to view a summary for the month.

1)

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

2)

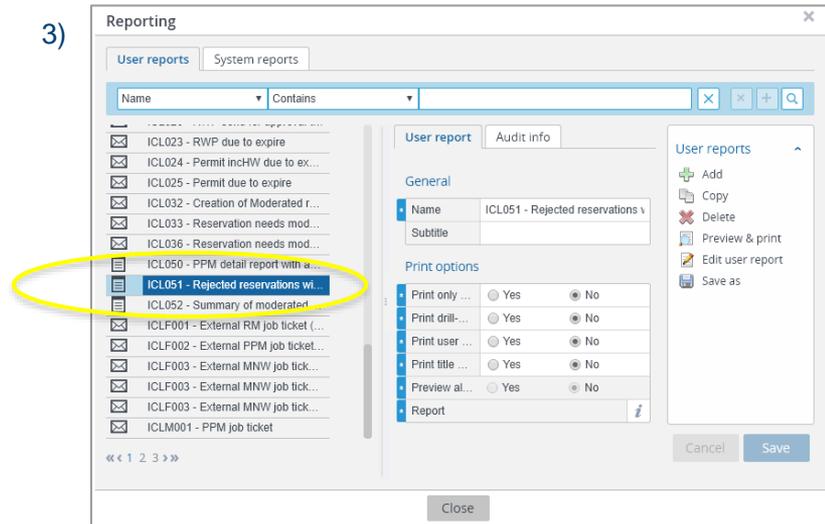
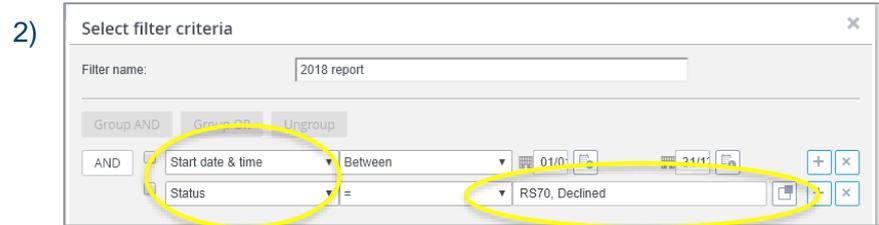


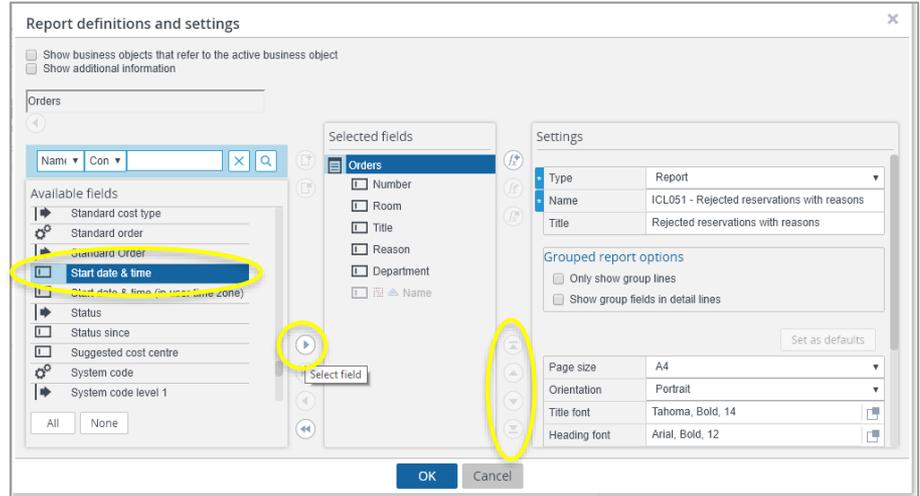
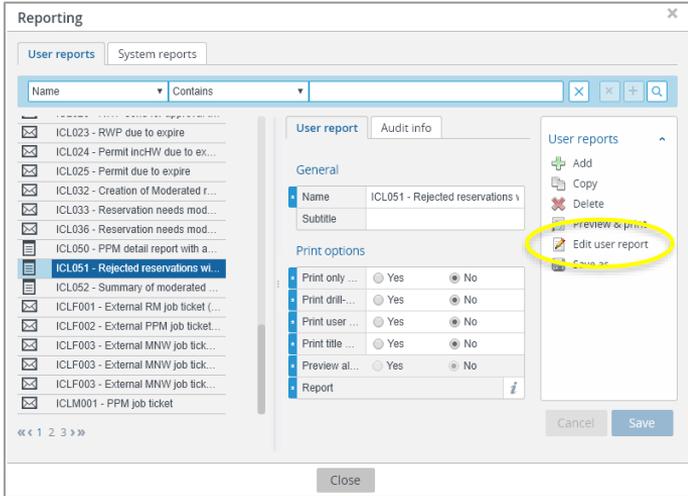
Row Labels	Sum of Confirmed	Sum of Declined	Sum of Awaiting approval
[-] CAGB-07-765 [18], restricted, moderated	3	0	13
(blank)	3	0	13
[-] DW_Test_Name	0	0	3
(blank)	0	0	3
[-] SHER-04-411 [6], restricted, moderated	53	6	12
ICL_DATA_RMMOD_ICT	53	6	12
<b>Grand Total</b>	<b>56</b>	<b>6</b>	<b>28</b>

3)

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

- 1) To create this report, navigate to the “Graphical planner” and set up a filter for the group of rooms to be reported on (see page 15 for how to set up a filter for moderated rooms).
- 2) Next navigate to the “Reservations” screen. Create a new filter on:
  - a) “Start date & time” - select the dates to be covered in the report
  - b) “Status” – select “RS70, Declined”
- 3) In the Reporting window, select “**ICL051 – Rejected reservations with reasons**”





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

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

Report definitions and settings

Show business objects that refer to the active business object  
 Show additional information

Orders

Available fields

T... | Name

- 'Time to attend' score
- 'Time to complete' score
- 'Time to fix' score
- 'Time to respond' score
- #
- Access restriction details
- Access restrictions?
- Activity subject
- Actual completion date-time

All None

Selected fields

- Start date & time
- Number
- Room
- Title
- Reason
- Department
- Name

Settings

Type	Report
Name	ICL051 - Rejected reservations with reasons
Title	Rejected reservations with reasons

Grouped report options

- Only show group lines
- Show group fields in detail lines

Page size: A4

Orientation: Landscape

Title font: Tahoma, Bold, 14

Heading font: Arial, Bold, 12

OK Cancel

Start date & Number	Room	Title	Reason	Department
Thursday, 5 July 2018 13:45	CAGB-07-765 (18), restricted, moderated	mod 765	just no	Information and Communication Technologies
Tuesday, 5 June 2018 16:45	CAGB-07-765 (18), restricted, moderated	testing repeat with you	nowt to do with you	Information and Communication Technologies
Tuesday, 26 June 2018 16:45	CAGB-07-765 (18), restricted, moderated	testing repeat with	too far out	Information and Communication Technologies
<b>ICL_DATA_RMMOD_ICT</b>				
Tuesday, 1 May 2018 10:30	SHER-04-411 (6), Test restricted, moderated		Not suitable use of room	Human Resources Division
Friday, 18 May 2018 12:00	SHER-04-411 (6), test67 restricted, moderated		because I'm in a stropky mood	Information and Communication Technologies
Wednesday, 2 May 2018 09:00	SHER-04-411 (6), Moderated restricted, unapproved meeting			Information and Communication Technologies
Thursday, 31 May 2018 11:54	SHER-04-411 (6), 3.6.1 restricted, moderated		approach me with cake and I might approve it	Human Resources Division
Thursday, 6 September 2018 11:55	SHER-04-411 (6), 3.5.2 restricted, moderated			Estates Division
Thursday, 17 May 2018 15:00	SHER-04-411 (6), ij test a3 restricted, moderated		please request 412 instead	Human Resources Division
Thursday, 31 May 2018 14:21	SHER-04-411 (6), x restricted, moderated			Information and Communication Technologies

Wednesday, May 30, 2018 17:35

Page 1 of 1

- The appearance of the report can also be edited here. For example, the orientation of the report can be changed from Portrait to Landscape to ensure it fits on the page to be printed.
- Once you are happy with the report, either select 'Preview & print' to generate a PDF of the report, or select 'Save as' to save a copy.