

Room data maintenance

Guide for Room Stewards

May 2019

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Room Steward Roles & Responsibilities

- Each department will have one key room steward and may have one or more backups.
- Room Data Room Stewards are expected to:
 - 1) Maintain room details in Planon for rooms “owned” by their department:
 - a) Initially check and update the data so it is correct
 - b) Update as changes occur
 - c) Review once a year
- The data to be maintained for each room includes:
 - Facilities and equipment
 - Capacity
 - Layout
 - Seating type
 - Photo
 - Known as name
 - Notes
 - Whether the room is :
 - Requestable
 - Catering Friendly
 - Exam friendly
 - Quiet room
 - Student bookable
 - Room access type
 - Directions
 - Accessibility link
 - Room contact
 - Room contact email
 - Room contact number
 - AV contact
 - AV contact email
 - Room steward
 - Room steward email

High level steps:

1. Navigate to the correct screen in Planon
2. Filter the list of rooms (to display only your own rooms or a subset of them)
3. Make changes to room data

Navigate to the correct screen in Planon

1. Login at planon.imperial.ac.uk
2. From left hand menu, click Room Booking then Room bookings
3. Select Graphical Planner in the top row
4. Select Data view tab

Filter the list of rooms

1. Use one of your existing filters or add a new one

Make changes to the room data

1. Select a single room, or a collection of rooms (using Shift or Control), or all rooms in the filtered list
2. Make changes and save

Navigation to the correct screen in Planon

Room Stewards have been granted access to the 'back office' functions in Planon.

To access this area, log into Planon in a browser, planon.imperial.ac.uk, and navigate to the menu on the left-hand side.

Click on "Room Booking" and then "Room bookings".

The screenshot displays the Planon back office interface. The top navigation bar is blue with the 'PLANON' logo and 'UNIVERSITY' text. Below the bar, there are two 'Home' buttons. The left-hand side menu is expanded, showing 'General Management', 'Room Booking', and 'Room bookings'. The 'Room Booking' and 'Room bookings' items are circled in yellow. The main content area is titled 'Room bookings' and contains an information message: 'This service is currently being rolled out as part of the [Room Booking Implementation project](#). You will be informed when it is available for your department. Contact rbproject@imperial.ac.uk for more information.' At the bottom of the main area, there are two buttons: 'Book a room' and 'My bookings'.

1)

Properties SHERFIELD > Floors & spaces > **Graphical planner** > Reservations > Reservation details > Reservation subdetails

Space units Asset units Flexible workspaces Projects

No filter

Code Contains

Code	Name	Capacity
402	Level 0	
SHER-04-402	SHER-04-402 (13), shared	13
SHER-04-409	SHER-04-409 (4), shared	4
SHER-04-411	SHER-04-411 (6), restricted, mod...	6
SHER-04-436	SHER-04-436 (4), restricted	4
SHER-04-437	SHER-04-437 (4), restricted	4

General Additional fields

Space unit data

Room type	Meeting room
Code	SHER-04-409
Campus	SK, SOUTH KENSINGTON
Building	SHER, SHERFIELD
Name	SHER-04-409 (4), shared
Space	409, Conference/Meeting
Room facilities	Yes
Calendar	MR - Bookable, Meeting Room calendar -
Num. of advance r.	365
Max. num. of reser.	1

Data view Graphical planner

Graphical Planner tab shows a list of rooms. There are two display tabs:

- Data view
- Graphical planner

1) **Data view tab** shows detailed room information and is used to maintain room data.

2) **Graphical planner tab** shows room bookings.

2)

Properties SOUTH KENSINGTON > Floors & spaces SHER-04 > **Graphical planner** > Reservations > Reservation details > Reservation subdetails

Space units Asset units Flexible workspaces Projects

31/05/2018

Code	Name	Capacity	Default Layo...
SHER-04-437	SHER-04-43...	4	
SHER-04-436	SHER-04-43...	4	
SHER-04-409	SHER-04-40...	4	
SHER-04-402	SHER-04-40...	13	

08:00 09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00

00 15 30 45 00 15 30 45 00 15 30 45 00 15 30 45 00 15 30 45 00 15 30 45 00 15 30 45 00 15 30 45

Graphical planner



Room Stewards have the ability to amend or cancel bookings in the back office of Planon. When displaying the Graphical Planner view, **do not click on the bookings.**



Space units Asset units Flexible workspaces Projects

No filter

Code Contal

Code - | Name

Space units (640)

ACEX-01-101	ACEX 10
ACEX-01-102	ACEX 10
ACEX-01-102A	ACEX 10
ACEX-01-103A	ACEX 10
ACEX-01-103B	ACEX 10
ACEX-01-151	ACEX 15

Count All None

« 1 2 3 4 5 6 7 8 9 10 »»

Select a single record from the list of Space units

Properties > Floors & spaces > Graphical planner > Reservations > Reservation details

Reservation subdetails

Space units Asset units Flexible workspaces Projects

No filter

Code Contains

Code - | Name | Capacity | ... |

Space units (640)

ACEX-01-101	ACEX 101 - Pilot Plant	15	
ACEX-01-102	ACEX 102 - UG Teaching Laborat...	50	
ACEX-01-102A	ACEX 102A - Synth Teaching Lab...	20	
ACEX-01-103A	ACEX 103A - Teaching Space 1	20	
ACEX-01-103B	ACEX 103B - Teaching Space 2	20	
ACEX-01-151	ACEX 151 - Student Workshop - ...	20	
ACEX-01-160	ACEX 160 - Supersonic Wind Tun...	6	
ACFX-01MM151R	ACFX M151R - Mezzanine Prie...	35	

Count All None

« 1 2 3 4 5 6 7 8 9 10 »»

Report

Report

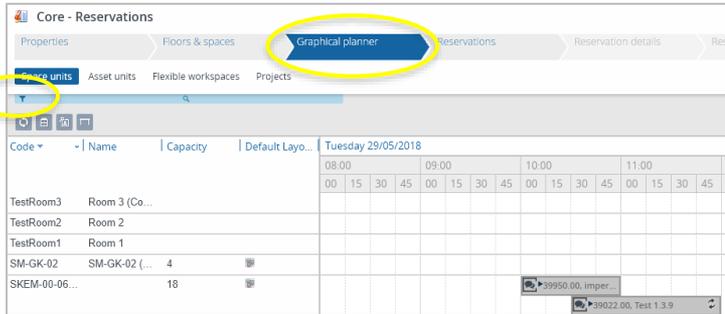
You can show or hide the room details by clicking the small arrow to the left of the display.

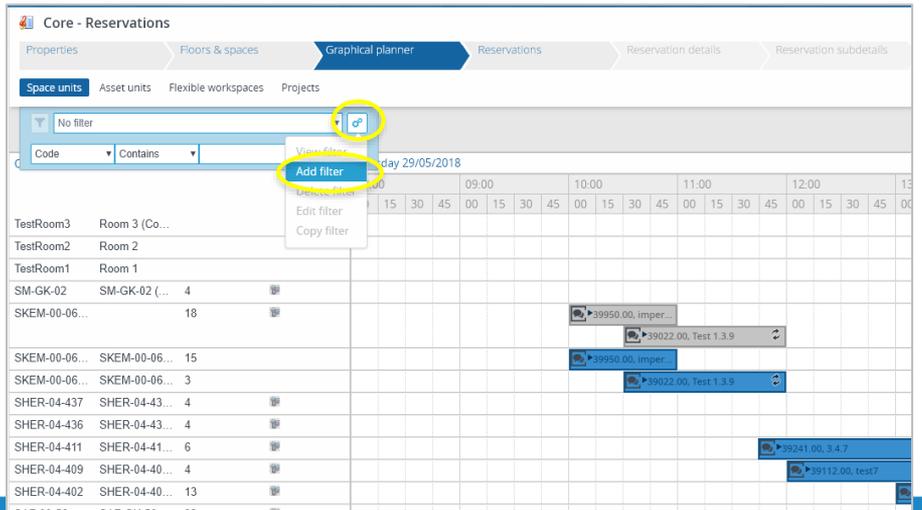
Setting up filters

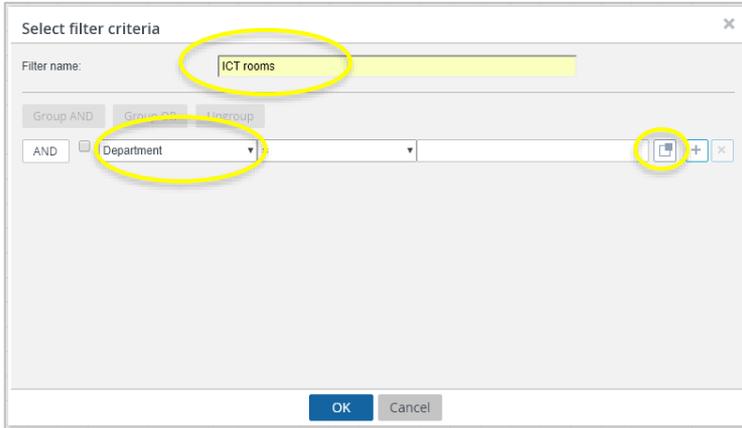
Setting up a filter – Department (1/2)

Filters can be created so that you only see the rooms you are responsible for.

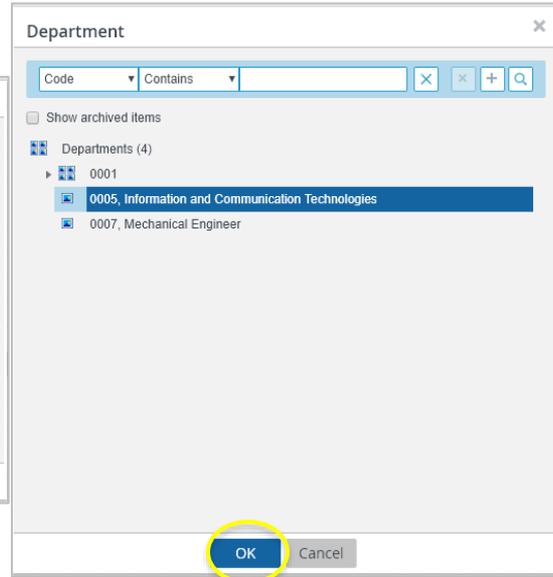
- 1) To set up a filter for your department, navigate to the “Graphical Planner”. Click the filter button.
- 2) Click on the cogs button and then “Add filter”

1) 

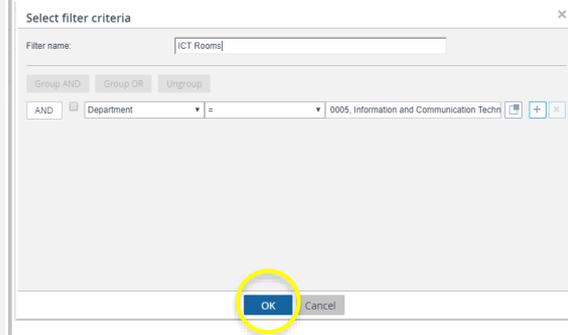
2) 



3) Give your filter a memorable name. In the drop-down menu, select “Department”. Click the pop-up button at the end of the row to bring up the options.



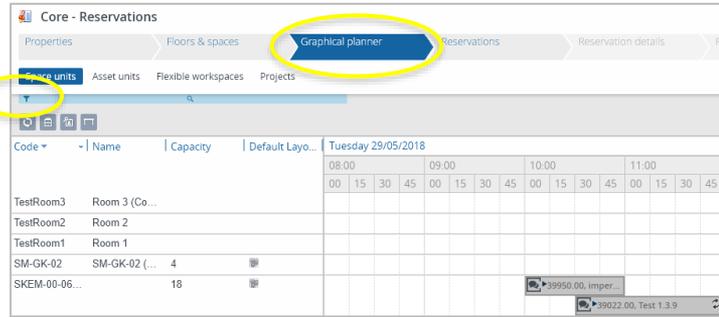
4) Select your department then click “OK”.



5) Click “OK”. You will now only see a list of the rooms in your department. This filter is now saved and can be turned on or off.

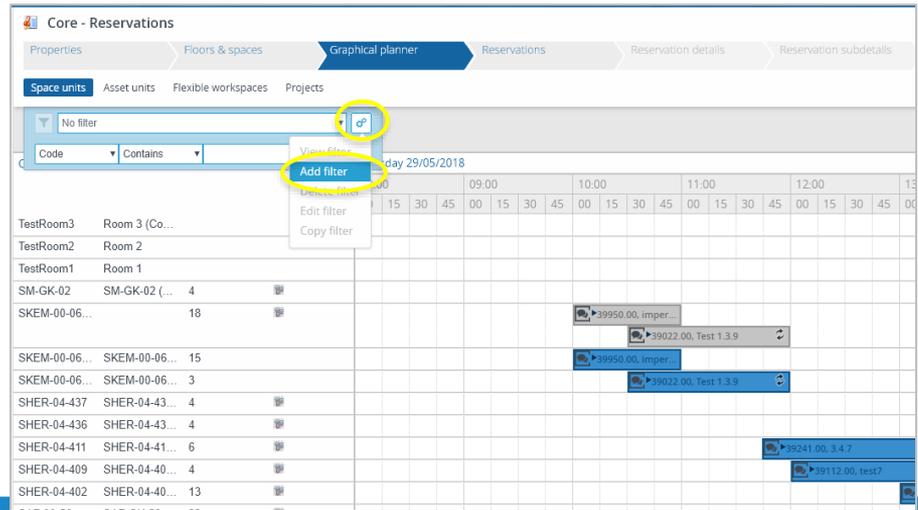
Setting up a filter – Room (1/2)

1)



1) To set up a filter for a room, navigate to the “Graphical Planner”. Click the filter button.

2)



2) Click on the cogs button and then “Add filter”

Select filter criteria

Filter name: room 505

Group AND Group OR Ungroup

AND Code Contains CAGB-05-505

OK Cancel

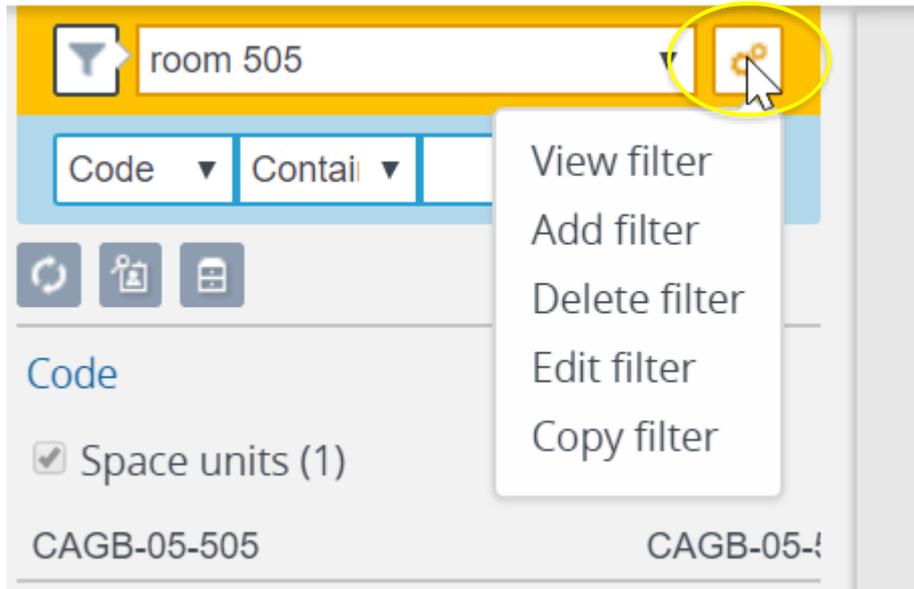
3) Give your filter a memorable name. In the drop-down menu, select “Code”. In the value field type the start of the room name. Then click “OK”.

room 505

Code Contains

Code	Name	Capacity	...
CAGB-05-505	CAGB-05-505 (12), restricted, mo...	12	

5) You will now only see this room. This filter is now saved and can be turned on or off.



To edit or delete a filter, select the filter, then click on the cogs to display the menu.

With no filter selection, only the Add filter option is available. With a filter selected, all options are available.

Setting up a filter – multiple criteria

Select filter criteria

Filter name: room 505

Group AND Group OR Ungroup

AND Code Contains CAGB-05-505

Preview changes OK Cancel

You can add multiple criteria to your filter. In this example, a filter has been created in order to view a bespoke selection of rooms.

1) While adding a new filter or editing an existing filter, click the “+” at the end of the row, which will add a new set of criteria below.

Select filter criteria

Filter name: room 505 and 575

Group AND Group OR Ungroup

OR Code Contains CAGB-05-505

Code Contains CAGB-05-575

Preview changes OK Cancel

2) In the new row, enter your additional criteria. Select AND or OR depending on whether a single room needs to meet both criteria (AND) or just one (OR) to be included in the list.

In this case, a second room has been added to the filter.

Updating Room Data

The screenshot shows a navigation menu with 'Graphical planner' selected. Below it, a search bar contains 'hxly 02'. A table lists room details with columns for Code, Name, and Capacity. The first row, 'HXLY-02-202', is highlighted.

Code	Name	Capacity	
HXLY-02-202	HXLY 202	18	
HXLY-02-206	HXLY 206	80	
HXLY-02-210	HXLY 210	40	
HXLY-02-213	HXLY 213 - Clore Lecture Theatre	255	

To view the data held against a room, navigate to the “Graphical planner”. Apply one of your saved filters. Planon will remember if you had a filter applied last time you used it and this will already be applied when you navigate to the “Graphical Planner”. The filter bar will be yellow if a filter is applied, and blue if no filter is applied. Select a room by clicking on it. In this case, HXLY-02-202 has been selected.

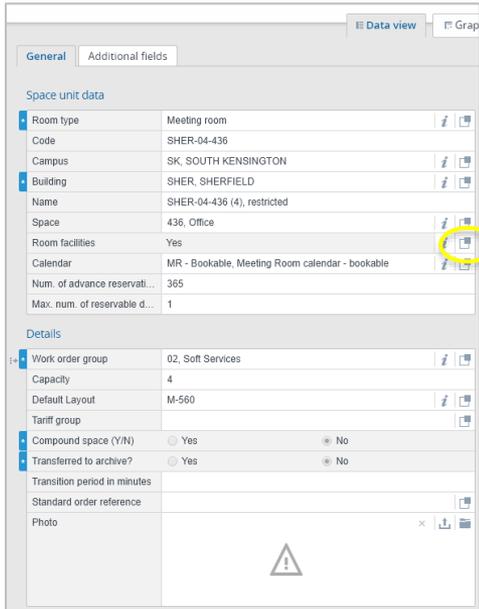
Select the “Data view” tab, all the data held against an individual room can be found in the “General” and “Additional fields” tabs.

In Appendix 1 (page 40) of this guide, a full list of the data fields which should or should not be amended by Room Stewards, can be found.

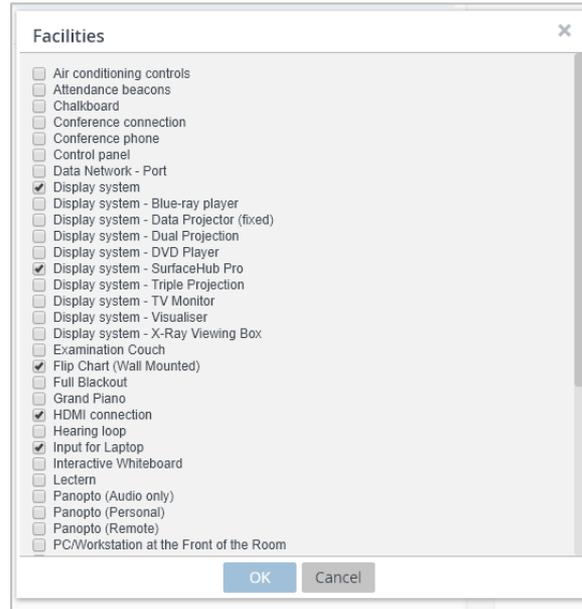
If data needs to be changed in a field which Room Stewards should not update, contact the Planon System Administrators in the [Estates Operations Customer Service Centre](#).

The screenshot displays the Planon software interface. The top navigation bar includes tabs for Properties, Floors & spaces, Graphical planner (selected), Reservations, Reservation details, and Reservation subdetails. Below this, there are sub-tabs for Space units, Asset units, Flexible workspaces, and Projects. A search bar at the top left shows 'No filter' and a dropdown menu set to 'Code' with a 'Contains' filter. A table lists space units, with 'SHER-04-436' highlighted in blue. The table columns are Code, Name, Capacity, and an icon column. To the right, a detailed view for room SHER-04-436 is shown, with 'General' and 'Additional fields' tabs highlighted in a yellow box. The 'General' tab contains fields for Room type (Meeting room), Code (SHER-04-436), Campus (SK, SOUTH KENSINGTON), Building (SHER, SHERFIELD), Name (SHER-04-436 (4), restricted), Space (436, Office), Room facilities (Yes), Calendar (MR - Bookable, Meeting Room calendar - bookable), Num. of advance reservati... (365), and Max. num. of reservable d... (1). The 'Details' section includes Work order group (02, Soft Services), Capacity (4), Default Layout (M-560), and Tariff group. There are also radio button options for Compound space (Y/N) and Transferred to archive? (Yes/No).

Code	Name	Capacity	
001	Meeting room		
402	Level 0		
CAGB-05-560		18	
CAGB-06-608		6	
CAGB-07-707	CAGB-07-707 (6), restricted	6	
CAGB-07-765	CAGB-07-765 (18), restricted, mod...	18	
DW_Test_Room_1	DW_Test_Room_1	7	
DW_Test_Room_Co	DW_Test_Name	7	
SAF-00-56	SAF-GK-56, (22), shared	22	
SHER-04-402	SHER-04-402 (13), shared	13	
SHER-04-409	SHER-04-409 (4), shared	4	
SHER-04-411	SHER-04-411 (6), restricted, mod...	6	
SHER-04-436	SHER-04-436 (4), restricted	4	
SHER-04-437	SHER-04-437 (4), restricted	4	
SKEM-00-064A	SKEM-00-064A (3), shared	3	
SKEM-00-064B	SKEM-00-064B, (15), shared	15	
SKEM-00-064C		18	
SM-GK-02	SM-GK-02 (4), shared	4	
TestRoom1	Room 1		
TestRoom2	Room 2		
TestRoom3	Room 3 (Compound)		



1) To change data, navigate to the field you would like to change, and click the pop-up button.



2) In this example, the “Room facilities” need to be updated. In the pop-up window, select or deselect the facilities as required.



3) This information will be reflected in the “More info” section of the ICLIS gadget, for general users.

Appendix

Space unit data (General)	Should Room Steward edit?*
Room type	No
Code	No
Campus	No
Building	No
Name	No
Space	No
Room facilities	Yes
Calendar	No
Num. of advance reservation days	No
Max. num. of reservable days	No

Details (General)	Should Room Steward edit?
Work order group	No
Capacity	Yes
Default Layout	Yes
Tariff group	No
Compound space (Y/N)	No
Transferred to archive?	No
Transition period in minutes	No
Standard order reference	No
Photo	Yes

*If data needs to be changed in a field which Room Stewards should not update, contact the Planon System Administrators in the [Estates Operations Customer Service Centre](#).

Room features (Additional fields)	Should Room Steward edit?
Requestable	Yes
Moderated room	No
Catering Friendly	Yes
Exam friendly	Yes
Seating type	Yes
Quiet room	Yes
Student bookable	Yes
Flooring material type	Yes
Area sqm	No

Access (Additional fields)	Should Room Steward edit?
Room access type	Yes
Directions	Yes
Accessibility link	Yes

Contacts (Additional fields)	Should Room Steward edit?	Room data (Additional fields)	Should Room Steward edit?	Celcat export data (Additional fields)	Should Room Steward edit?
Room contact	Yes	Department	No	KX ID	No
Room contact email	Yes	Start Date	No	Year availability	No
Room contact number	Yes	End date	No	Celcat ID	No
AV contact	Yes	Known as	Yes	Demand category	No
AV contact email	Yes	Calendar	No		
Moderator team email	No	Owning system	No		
Moderator group	No	Last Updated By	No		
Room booking group	No	Late update Date	No		
Super user	Yes	Notes	Yes		
Super user email	Yes	Notes (private)	Yes		