

Cancel Room Booking

Guide for Room Stewards

July 2019

Contents

Roles and Responsibilities of a Room Steward	3
Navigation in the Planon 'Back Office'	5
Setting up Filters	9
Updating Room Data	16
Appendix 1 – Full list of room data and Room Steward permissions	20

Room Steward Roles & Responsibilities

- Each department will have one key room steward and one or more backups.
- Planon Room Stewards are expected to:
 - 1) Maintain room details in Planon for rooms “owned” by their department:
 - a) Update as changes occur;
 - b) Review once a year.
 - 2) Provide content for the Room Booking website and notify system administrators in the [Estates Operations Customer Service Centre](#) of any updates required.
- Room Stewards are able to modify and cancel bookings in rooms “owned” by their particular department using Planon back office functionality.



Room Stewards can amend or cancel their own and others' bookings in the back office of Planon.

Warnings:

- It is recommended that in most cases Room Stewards advise general users to amend, or cancel, their own bookings. However, this functionality is useful in the following cases:
 - A user is away or has left the College, but their room bookings remain in the system, which will not be used.
 - A room swap has been agreed between room users, and a Room Steward can more easily swap these around in the back office, rather than users cancelling and rebooking in the Room Booking Wizard.
- Room Stewards have access to ALL rooms in the system. Therefore, they must be very careful not to amend bookings in areas where they don't have authority to do so and it is recommended filters are set up to prevent this.
- As room bookings can be made in Outlook or Planon, it is important the Room Steward checks the source of the booking before attempting to amend it. There are limitations to what can be changed when the booking was originally made in Outlook.

High level steps:

1. Navigate to the room list in Planon
2. Filter the list of rooms (to display only your own rooms or a subset of them)
3. Navigate to the list of bookings (reservations)
4. Select and cancel the booking

Navigate to the room list 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 and select room

1. Use one of your existing filters or add a new one
2. Select one room from the list

Navigate to the list of bookings

1. Select one room from the list
2. Select the Reservations tab in the top row.

Select and cancel the booking

1. Find the booking in the list and select it.
2. Check the booking details to make sure you have selected the correct booking.
3. From the right hand menu, click Cancel

Warning - This cannot be undone

Navigation to the room list 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. At the top, the Planon logo is visible. Below it, a navigation menu is shown with the following items: Home, General Management, Room Booking, and Room bookings. The 'Room Booking' item is highlighted with a yellow oval, and the 'Room bookings' item is also highlighted with a yellow oval. To the right of the navigation menu, the main content area displays a 'Room bookings' section. This section contains an information message stating: '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.' Below the message, 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

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

Space units

- Add
- Copy
- Delete
- Transfer to archive
- Retrieve from archive

Links

- Link reservation units

Report

- Report

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.**



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

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	+

Select a single record from the list of Space units

Count | All | None

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

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	
ΔCFX 01MM151R	ΔCFX M151R - Mezzanine Prie...	35	

Count | All | None

Report

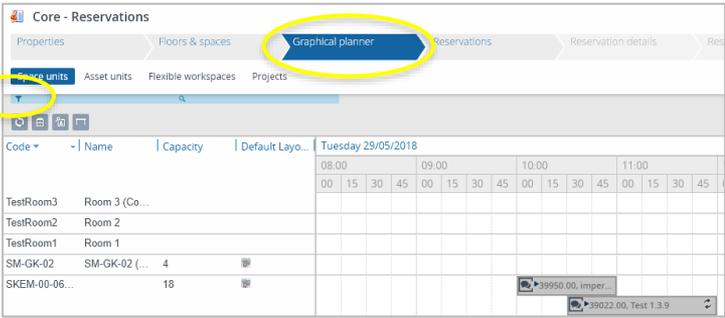
Report

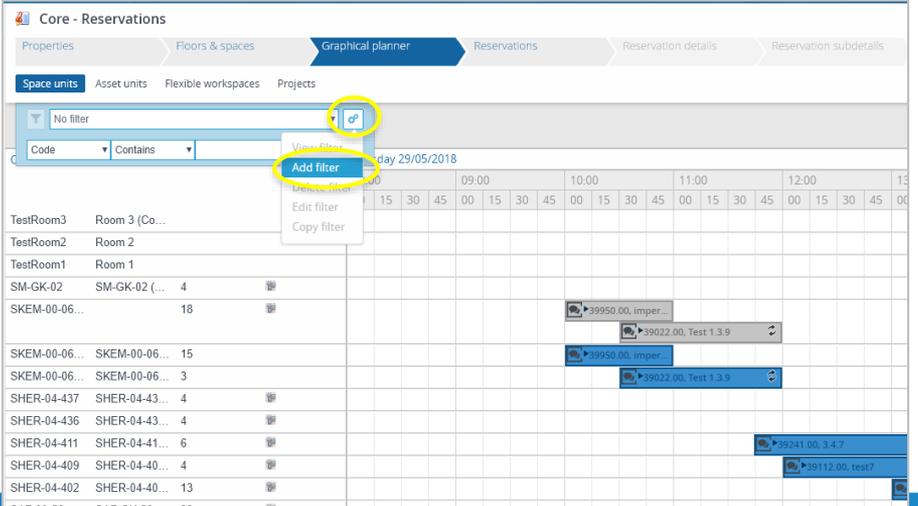
Setting up filters

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) 

Setting up a filter – Department (2/2)

Select filter criteria

Filter name: ICT rooms

Group AND Group OR Ungroup

AND Department

OK Cancel

Department

Code Contains

Show archived items

Departments (4)

- 0001
- 0005, Information and Communication Technologies
- 0007, Mechanical Engineer

OK Cancel

Select filter criteria

Filter name: ICT Rooms

Group AND Group OR Ungroup

AND Department = 0005, Information and Communication Techn

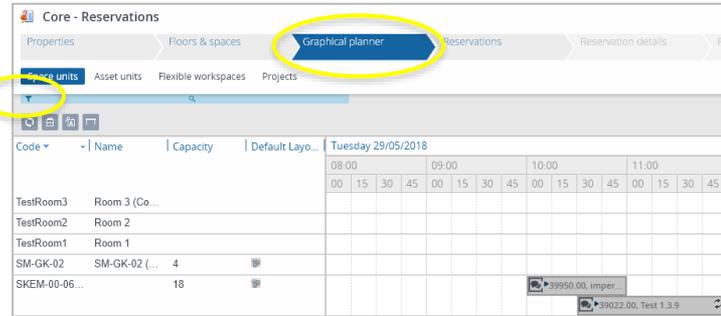
OK Cancel

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”.

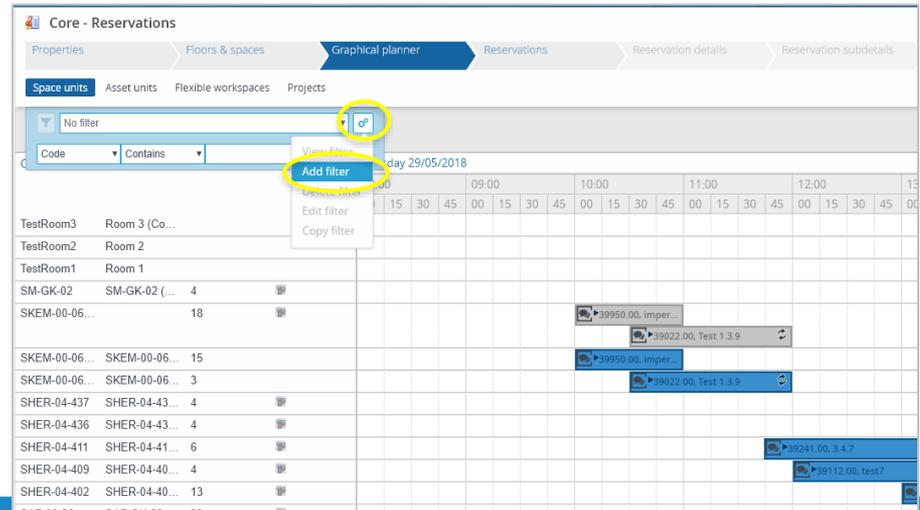
5) Click “OK”. You will now only see a list of the rooms in your department. This filter is now saved and can be turned on or off.

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

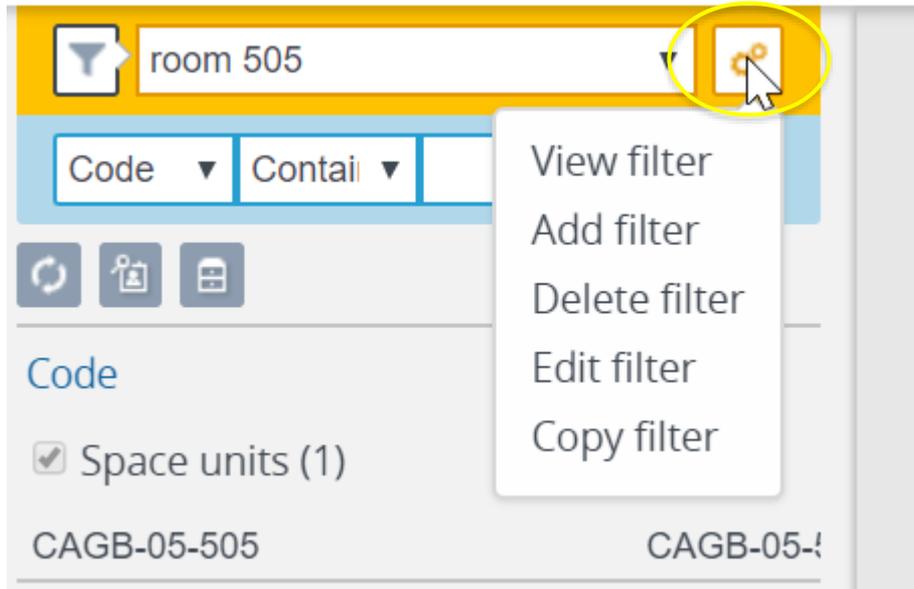
3) Give your filter a memorable name. In the drop-down menu, select “Code”. In the value field type the start of the room name. Then click “OK”.

room 505

Code Contains

Code	Name	Capacity	...
Space units (1)			
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

The screenshot shows a dialog box titled "Select filter criteria" with a close button (X) in the top right corner. Below the title bar, there is a "Filter name:" field containing the text "room 505". Underneath, there are three tabs: "Group AND", "Group OR", and "Ungroup". The "Group AND" tab is selected. Below the tabs, there is a row of criteria: a radio button next to "AND", a dropdown menu set to "Code", another dropdown menu set to "Contains", and a text input field containing "CAGB-05-505". A yellow circle highlights a "+" button at the end of this row. At the bottom of the dialog, there are three buttons: "Preview changes", "OK", and "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.

The screenshot shows the same "Select filter criteria" dialog box, but now with two rows of criteria. The "Filter name:" field now contains "room 505 and 575". The "Group OR" tab is selected. The first row of criteria is identical to the first screenshot: a radio button next to "OR", a dropdown menu set to "Code", another dropdown menu set to "Contains", and a text input field containing "CAGB-05-505". A yellow circle highlights the "OR" radio button. The second row of criteria is: a radio button next to "OR", a dropdown menu set to "Code", another dropdown menu set to "Contains", and a text input field containing "CAGB-05-575". A yellow oval highlights the entire second row. At the bottom of the dialog, there are three buttons: "Preview changes", "OK", and "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.

Find and select the booking

The screenshot shows the 'Room bookings' interface. The top navigation bar has tabs for 'Properties', 'Floors & spaces', 'Graphical planner', 'Reservations', and 'Reservation details'. The 'Reservations' tab is highlighted with a yellow circle. Below the navigation bar, there are filters for 'Space units', 'Asset units', 'Flexible workspaces', and 'Projects'. A dropdown menu shows 'Faculty building'. Below that, there are search and filter options for 'Code' and 'Contains'. A table lists room units with columns for 'Code', 'Name', and 'Capacity'. The first row, 'ICFB-03-3.10', is highlighted with a yellow circle.

Code	Name	Capacity
ICFB-03-3.10	ICFB-03-3.10 (8), shared	8
ICFB-03-3.11	ICFB-03-3.11 (8), shared	8
ICFB-03-3.16a	ICFB-03-3.16a (6), moderated, sh...	6
ICFB-03-3.19	ICFB-03-3.19 (10), shared	10
ICFB-04-4.20	ICFB-04-4.20 (20), restricted	20

1. With the list of rooms filtered, select the room that holds the booking you want to cancel.
2. Then, click Reservations tab in the top row.

The screenshot shows the 'Room bookings' interface with the 'Reservations' tab selected. The top navigation bar has tabs for 'Properties', 'Floors & spaces', 'Graphical planner', 'Reservations', and 'Reservation details'. The 'Reservations' tab is highlighted. Below the navigation bar, there are filters for 'Reservations', 'Exchange mailbox', and 'Lost Exchange subscriptions'. A dropdown menu shows 'No filter'. Below that, there are search and filter options for 'Comment' and 'Contains'. A table lists reservations with columns for 'Stat...', 'Number', 'Description', and 'Start date & time'. The first row, '412496.00', is highlighted.

Stat...	Number	Description	Start date & time
412496.00		Interviews	10/07/2019 09:00
261016.00		1-2-1 Meeting with Anna	10/07/2019 11:00
412705.00		Enterprise Interviews	10/07/2019 11:00
412497.00		Interviews	10/07/2019 11:30
347257.00		Enterprise Comms Group meeting	10/07/2019 14:30
444617.00		Interviews	10/07/2019 15:00
412511.00		Enterprise Interviews	11/07/2019 09:00

The list of all bookings (reservations) in the selected room is displayed, in order of start date/time.

Room bookings

Properties Floors & spaces Graphical planner (ICFB-03-3.10, ICFB-03-3.10 (8)... Reservations Reservation details

Reservation subdetails

Reservations Exchange mailbox Lost Exchange subscriptions

No filter

Comment Contains

Orders (285)

Stat...	Number	Description	Start date & time
412496.00	Interviews	Interviews	10/07/2019 09:00
261016.00	1-2-1 Meeting with Anna	1-2-1 Meeting with Anna	10/07/2019 11:00
412705.00	Enterprise Interviews	Enterprise Interviews	10/07/2019 11:00
412497.00	Interviews	Interviews	10/07/2019 11:30
347257.00	Enterprise Comms Group meeting	Enterprise Comms Group meeting	10/07/2019 14:30
444617.00	Interviews	Interviews	10/07/2019 15:00
412511.00	Enterprise Interviews	Enterprise Interviews	11/07/2019 09:00

Count All None « < 1 2 3 4 5 6 > »

Reservation meeting r...

- Add
- Add sub
- Add standard
- Add standard sub
- Copy
- Delete
- Show all questions/ans...
- Add visitors
- Replace tariff group
- Make recurrent
- Repeat suborder withi...
- Change type
- Transfer to archive

1. Scroll up and down each page using the scroll bar
2. Move from page to page using the page links at the bottom of the list

3. Select a booking by clicking on it.
4. Click on the arrow to open or close the window that displays the booking details

The screenshot shows the 'Room bookings' interface. On the left, there is a list of bookings with columns for 'Stat...' and 'Number'. The booking with number '412496.00' is selected. On the right, the 'Reservation meeting r...' details are displayed. A yellow circle highlights the dropdown menu for the selected booking, and a yellow oval highlights the scroll bar on the right side of the details panel.

The screenshot shows the 'Reservation meeting r...' details panel. The 'General' tab is active, displaying the following fields:

Field	Value
Start date & time	10/07/2019 09:00
End date & time	10/07/2019 11:00
Number	412496.00
Order group	02, Soft Services
External visitors?	

The 'Status' section shows:

- Status: RS30, Confirmed
- All suborders completed: Yes No

The 'Location data' section shows:

Field	Value
Property	ICFB, FACULTY BUILDING
Reservation unit	ICFB-03-3.10, ICFB-03-3.10 (8), shared

1. Scroll through the details to determine if the booking you have selected is the one you want to cancel
2. If necessary, click the arrow to close the booking details and display the full list of bookings to select another one.

The screenshot shows the 'Reservations' interface for a room booking. The main details are as follows:

Field	Value
Start date & time	10/07/2019 09:00
End date & time	10/07/2019 11:00
Number	412496.00
Order group	02, Soft Services
External visitors?	

Status: RS30, Confirmed

All suborders completed: Yes (selected), No

Location data:

Property	ICFB, FACULTY BUILDING
Reservation unit	ICFB-03-3.10, ICFB-03-3.10 (8), shared

The right-hand side menu is open to 'Status transitions', with the following options:

- Option
- Completed
- Cancelled** (highlighted with a yellow circle)
- Show flow diagram

At the bottom of the menu are 'Cancel' and 'Save' buttons.

Cancel the booking

1. Once you are **certain** you have selected the correct booking In the menu on the right-hand side, scroll down to the “Status transitions” heading and click “Cancelled”.
2. The organiser of the booking will receive an email telling them the booking is cancelled.



Warning: Clicking Cancel will immediately cancel the booking. The system does not ask you to confirm and you cannot un-cancel a booking.