

PLEODATA Empowering Enterprises for Greater Success

PleoData Resource Management System User Guide

VERSION: 1.0 AMOS TAN



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Introduction

Overview

PleoData Resource Management System is a meeting room and resource booking web application. Targeting businesses who need to have an effective way to manage meeting rooms and resources (e.g. audio-video equipment), and share with any O365 users.

It is a Software-as-a-Service application ("Service") hosted on Microsoft Azure and available to users as a paid subscription. We provide 3 types of subscription; "Lite", "Standard" and "Professional" with different pricing tiers. And for each subscription, the pricing is also based on the number of user licenses that the customer subscribed.

Depending on your subscription type, you may not see all functionalities described in this user guide when you sign-in to the application.

Multi-Tenancy Support

The application is built with multi-tenancy support. Each customer subscription is associated with one tenant. And each tenant has its own application database.

When a tenancy is first created, a tenant administrator account ("Tenant Admin") will be created for the customer. The customer representative can then use this Tenant Admin account to create other user accounts. For more details, please refer to <u>Chapter 5:</u> <u>Administration, Manage Users</u>.

Pre-requisites

Below are the pre-requisites for accessing and using the application;

- a. A valid subscription with PleoData.
- b. Users need to have a Microsoft user account (for example O365 account) and a tenant user account with the same login name as their Microsoft user account.
- c. Internet access to Microsoft Azure.
- d. The application does not support Microsoft Internet Explorer 10 and below.



Chapter 1: Room Booking

Dashboard

When you sign in to the application, you will see the Dashboard page (see figure 1.1 below). This page provides a holistic view of your current room bookings and will allow you to accomplish most of your room booking tasks.

LEO RMS	⊒ <u>₽</u>									**	Pleodata - RMS Te	nant 1 (défault)	John 🤄	Chan (0365) 👻
)ashboard													
ashboard	elcome to PleoData Resource Manage	ment, Room Booking Dashboard												
alendar >							-						_	_
ook Resource		4				21 - Aug 25, 201							This V	
eports >	Total Current Bookings	Current Pending Book	kings	Day	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
oom Admin >		<u>^</u>		Mon	******									
esource Admin $ ightarrow$	Cur	rent Confirmed Bookings		Tue										
natytics >		en comme possige		Wed										
dministration >	1	0		Fri										
	Current Cancelled Bookings	Current Rejected Bool	kings								Search bo	okings		
	Room Name	Description	Start D	ate		End Date		Boo	ced By		Status	overige	Action	
	Room B (Cap 5)	Product Review	25-Aug	2017 10:00 AM		25-Aug-2017 12	-00 PM		s Tan (Google)		Booked		Edit	
													_	
	Room C (Cap 20)	Repeated Booking Test	28-Aug-	2017 09:00 AM		28-Aug-2017 11	MA 00:	Johr	Chan (0365)		Pending Appro	val	Edit	
	Room C (Cap 20)	Repeated Booking Test	29-Aug-	2017 09:00 AM		29-Aug-2017 11	MA 00:	Johr	Chan (0365)		Pending Appro	val	Edit	
	Room C (Cap 20)	Repeated Booking Test	30-Aug-	2017 09:00 AM		30-Aug-2017 11	:00 AM	Johr	Chan (0365)		Pending Appro	val	Edit	
	Room C (Cap 20)	Repeated Booking Test	31-Aug-	2017 09:00 AM		31-Aug-2017 11	:00 AM	Johr	Chan (0365)		Cancelled		Edit	

Figure 1.1: Dashboard Page

All application pages have the familiar 2-column page layout beneath a common header. With a left navigation column ("Left Menu") and a wider right column for dynamic content ("main panel").

In the Dashboard page, on the top-left corner of main panel, there are 5 stats widgets that display the following statistics for the sign-in user current room bookings;

- a. Total Current Bookings these are bookings with start date, equal or greater than the current date.
- b. **Current Pending Bookings** these are current bookings for rooms that require booking approval, and are pending approval by the facility administrators.
- c. Current Confirmed Bookings these are current bookings that have been confirmed.
- d. Current Cancelled Bookings these are current bookings that have been cancelled.
- e. **Current Rejected Bookings** these are current bookings for rooms that require booking approval, and have been rejected by the facility administrators.

The statistics in the widgets are updated when the sign-in user updates any room booking (for example, when the user cancels a room booking).



The top-right corner of the main panel, contains the Room Utilization chart (see figure 1.2 below).

Day	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
Mon										
Tue										
Wed										
Thu										
Fri										

Figure 1.2: Room Utilization Chart

This chart displays the weekly room utilization by hourly timeslots (8 am to 6 pm) and the day of the week, for the entire tenant. By default, the current week room utilization data is displayed. You can however click on the "Next Week" button on the chart, to view next week utilization data.

The darkness of each cell background colour, presents the room utilization rate for a specific timeslot in a week day. A darker background colour indicates a higher room utilization rate. And a white background colour indicates 0 utilization.

When you mouse-over a cell, a tooltip will be displayed indicating the room utilization (booking) rate in percentage (see figure 1.3 below).

With these visual clues, you will be able to tell in a glance what are timeslots with available rooms for booking.

			ug 25, 2017						This Week	Next Week
Day	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
Mon		******				******				
Tue										
Wed			40% booked!							
Thu										
Fri							******		******	

Figure 1.3: Room Utilization Chart – Tooltip

When you click on a timeslot, and the statistics widgets will be replaced by the Available Rooms widget (see figure 1.4 below).



Dashboard Welcome to PleoData Resource Management, Room Boo	king Dashboard						
Available Rooms: 24 Aug, 10:00 AM		Room Uti	lization: Au	ug 21 - Aug 2	25, 2017		
Room A (Cap 12)		Day	08:00	09:00	10:00	11:00	12:00
Capacity: 12 Power Point Internet Access	Vertex Tower A	Mon					
		Tue					
Room C (Cap 20) Capacity: 20	• Vertex Tower A	Wed					
Power Point Internet Access Tele-Conference		Thu					
	View More Close	Fri					
•							

Figure 1.4: Available Rooms Widget

From the Available Rooms widget, you can see the types of rooms (differentiated by capacity, location and fixed equipment) that are available for booking. If there are more than 2 available rooms, you can click on "View More" button to view more available rooms.

You can book a room by clicking on the title of room that you want to book, and the "Create Room Booking" modal dialog will be displayed (see figure 1.5 below).

To submit a room booking, all you need to do, is to enter a title and click on "Create" button.

		🖀 Pleodata - RMS	Eenant 1 (default) 🖉 🦉
Create Room Booking		×	
Title			
Room Name	Room A (Cap 12)		
Room Capacity	12		14:00 15:00
Location	Vertex Tower A		
F&B Request		li li	•••••
Repeat Booking	● No Yes		
Start Date Time	29-Aug-2017 10:00 AM		•••••
End Date Time	29-Aug-2017 11:00 AM		
Booked For	type the user name to select a user		Search bookings
	Create Close		atus
			poked

Figure 1.5: Room Booking Modal Dialog



If the create operation is successful, a toaster notification will be displayed indicating that the new room booking has been created successfully. The new booking will also be listed in the Current Room Bookings table beneath the Room Utilization chart (see figure 1.6 below).

ይ							🍘 P					
shboard me to PleoData Resour	rce Management, Room Booking Das Vard 'Reser	te Room Bookin rve room for doo essfully.		m booking(s), ha		d ×						
7	4	Roo	m Utilization:	Aug 21 - Aug	25, 2017						This Week	Next Week
	gs Current Pending Bookings	Da	y 08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
		Mo	n									
	0	Tu	e									
с	urrent Confirmed Bookings	We	d									
		Th	u									
1	0	Fri										
L Current Cancelled Book	ings Current Rejected Bookings	Fri										
	ings Current Rejected Bookings	Fri Start D									Action	
urrent Room Bool	ings Current Rejected Bookings	Start D:		End D:					Search			
urrent Room Bool	ings Current Rejected Bookings Kings Description	Start D: 25-Aug-	ate	End Da 25-Aug	ate	И.,	Booked By	ogle)	Search	bookings	Action	
urrent Room Bool Room Name Room B (Cap 5)	ings Current Rejected Bookings Kings Description Product Review	Start D: 25-Aug- 28-Aug-	ate 2017 10:00 AM	End D: 25-Aug 28-Aug	ate 2-2017 12:00 P!	м .	Booked By Amos Tan (Goo	ogle) 165)	Search Status Status Booked	bookings	Action Edit	
urrent Room Book Room Name Room B (Cap 5) Room C (Cap 20)	Ings Current Rejected Bookings Kings Description Product Review Repeated Booking Test	Start D: 25-Aug- 28-Aug- 29-Aug-	ate 2017 10:00 AM 2017 09:00 AM	End Da 25-Aug 28-Aug 29-Aug	ate 3-2017 12:00 Pł 3-2017 11:00 Ał	м .	Booked By Amos Tan (Goo John Chan (O3	ogle) 165)	Search I Status Booked Pending Ap	bookings	Action Edit Edit	
Irrent Room Book Room Name Room B (Cap 5) Room C (Cap 20) Room C (Cap 20)	Ings Current Rejected Bookings Current Rejected Booking Description Product Review Repeated Booking Test Repeated Booking Test	Start D 25-Aug- 28-Aug- 29-Aug- 29-Aug-	ate 2017 10:00 AM 2017 09:00 AM 2017 09:00 AM	End D: 25-Aug 28-Aug 29-Aug 29-Aug	ate 3-2017 12:00 Pf 3-2017 11:00 Af 3-2017 11:00 Af	м . м .	Booked By Amos Tan (Goo John Chan (O3 John Chan (O3	ogle) 165) 165)	Search 1 Status Booked Pending Aj Pending Aj	bookings	Action Edit Edit Edit	

Figure 1.6: Create Booking Success Message & Current Room Bookings Table

If you need to edit a current room booking, you can do so by clicking the "Edit" button for required room booking. And the "Edit Room Booking" modal dialog will be displayed (see figure 1.7 below).

From the modal dialog, you can edit the following booking information;

- a) Room selection
- b) Start Date
- c) Start Time
- d) End Time
- e) Booked For

The "Booked For" is an optional field that allows you to specify the user that you want to book the room for. The "Booked For" user and you will have equal rights to edit this booking. The "Booked For" user will be able to view such bookings in their dashboard.

Besides editing the booking information, you can also confirm or cancel the room booking from this modal dialog.



			∦ Pleodata -	RMS Tenant 1 (de	fault) 🖌	
Edit Room Booking (ID: 91)				×		
Title	Reserve room for documentation					
Room Name	Room A (Cap 12)		¥			
Room Capacity	12			14:00		
Location	Vertex Tower A					
F&B Request						
Start Date	29 Aug 2017	e	2			
Start Time	10:00	0				
End Time	11:00	e				
Booked For	type the user name to select a user			Search		
Status	Booked			Status		
Booked By	John Chan (O365)			Booked		
	Save Confirm Cancel Close			Pending Aj		
				Pending Aj		

Figure 1.7: Edit Room Booking Modal Dialog

Room Booking Calendar

Besides the Dashboard page, you can also view room bookings in the Calendar – Room Booking page. You can navigate to this page, by clicking on the Calendar > Room Booking link in the Left Menu (see figure 1.8 below).

By default, this calendar view will display all room bookings for the current month. To view your own bookings only, you can click on "My Bookings" button at the bottom-left corner of main panel. This is a toggle button, clicking on it the second time, will cause the calendar to display all room bookings.

The "Others' Bookings" toggle button behaves similarly but with the reverse effect.

The calendar will also display holidays based on the Locale application setting (please refer to <u>Chapter 5: Administration, Manage Settings</u> section for more details).



Navigation	Calendar > Room Bo	poking						■ Actions
🕙 Dashboard								
🗮 Calendar 🗸 🗸	+ Add							Day Week Month
Room Booking	<			AUGUST 2017				>
Resource Booking	Sun	Mon	Tue	Wed	Thu	Fri		Sat
💧 🛛 Book Resource		31		1	2	3	4	
Reports >		10a Project Update 1p SG - 1PM-3PM	10a Project Sync Up	1p Project A Discussion	9:30a Brainstorming Session	10a Test booking		
Room Admin >	6	10 30 - 1PM-3PM		8	9	10	11	1
Room Admin >	-	10a App Submission Preparation		National Day	2p Launch Support			-
🚆 Resource Admin >				8a Test Booking from Calendar				
Analytics >	13	14	1	5	16	17	18	1
· · · · · · · · · · · · · · · · · · ·					9a Comfort Ufinity Maintenance			
Administration >	20	21	2	2	23	24	25	2
					9:30a Management Meeting 10a App Demo	8a Test Waiting List1 10a Product Review		
	27	28	2	9	30	31		
	-	9a Repeated Booking Test	9a Repeated Booking Test	9a Repeated Booking Test		Hari Raya Haji		
			10a Reserve room for documentatic			9a Repeated Booking Test		
i i								
	🖉 My Bookings 🖉 Others' B	Bookings						

Figure 1.8: Room Booking Calendar

When you mouse-over a room booking entry, a tooltip will appear, providing a summary of the booking (see figure 1.9 below).

20	21	22	23	
				9:30a Management I
27	2	Reserve room for documentation (Room A (Cap 12), Vertex Tower A) ends on 11:00 am [Booked]	30	10a App Demo
	9a Repeated Booking Test	10a Reserve room for document	9a Repeated Booking Test	

Figure 1.9: Calendar - Room Booking Tooltip

To view more details for a room booking, you can click on the room booking entry and a modal dialog, like the one in the Dashboard page (see figure 1.7), will be displayed.

If the booking belongs to another user, the modal dialog will not allow you to edit the booking information. And the only visible button is the "Close" button.

You can also create new room booking in this calendar view by clicking on the Add button or double-clicking on a cell in the calendar. The "Create Room Booking" modal dialog like the one in the Dashboard (see figure 1.5) will be displayed.

Alternatively, you can also perform a search for the available rooms to book, by clicking on the "Actions" button on the top-right corner of main panel. And a side panel will appear to the right of the main panel (see figure 1.10 below), showing the "Find Available Rooms" widget.



EO	PLEO RMS	⊡ <u> </u>					#	Pleodata - RMS Tenant 1 (defa	ault) 😴 John Chan (O365) 💌 🧧
Naviga	ation	Calendar > Roor	m Booking						■ Actions
0	Dashboard								
=	Calendar 🗸 🗸	+ Add						Day Week Month	Q, 🗐
	Room Booking	×			AUGUST 2017			>	Start Date Time
	Resource Booking	Sun	Mon	Tue	Wed	Thu	Fri	Sat	25-Aug-2017 02:00 PM
۵	Book Resource			1	2	3	4	5	Duration (hour)
			10a Project Update	10a Project Sync Up	1p Project A Discussion	9:30a Brainstorming Sessio	10a Test booking		1
	Reports >		1p SG - 1PM-3PM						
	Room Admin >	6	7	8			11	12	Location
_	Resource Admin >		10a App Submission Prepar		National Day	2p Launch Support			All locations 🔻
-	Resource Automity	13	14	15	8a Test Booking from Calen	17	18	19	Room Capacity
- di	Analytics >	13	14	15	10	9a Comfort Ufinity Maintena	18	19	Room capacity
	Administration >								
- T		20	21	22	23		25 8a Test Waiting List1	26	Clear Find Rooms
						9:30a Management Meeting 10a App Demo	10a Product Review		
		27	28	29	30				
			9a Repeated Booking Test		9a Repeated Booking Test		Hari Raya Haji		
				10a Reserve room for docur			9a Repeated Booking Test		
_		🖉 My Bookings 🖉 C	Others' Bookings						

Figure 1.10: Calendar – Search Available Rooms

By default, the Start Date Time will display the current date and nearest hour, Duration will be set to 1 hour and Location is defaulted to "All locations".

If need be, you can edit these values and indicate the room capacity you require. Once the search criteria are set, you can click on the "Find Rooms" button and the matching available room(s) will be displayed (see figure 1.11 below).

You can book from one of available rooms, by clicking on the "Book" icon for one of the search results. And the familiar "Create Room Booking" modal dialog will be displayed. Fill in the necessary information, and click on the "Create" button to complete the booking action.



		■ Actions
	Day Week Month	Q 🗐
	>	Start Date Time
Fri	Sat	28-Aug-2017 02:00 PM
3 4	5	Duration (hour)
10a Test booking		1
) 11	12	Location
		All locations 🔹
7 18	19	Room Capacity
4 25	26	
8a Test Waiting List1		Clear Find Rooms
10a Product Review		
1	2	PleoData Office (HQ) (Capacity: 20)
Hari Raya Haji 9a Repeated Booking Test		Vertex Tower A
7 8		Room A (Cap 12) (Capacity: 12)
		🕈 Vertex Tower A 🖉
		Room B (Cap 5) (Capacity: 5) Vertex Tower A
		Room C (Cap 20) (Capacity: 20)
		🕈 Vertex Tower A

Figure 1.11: Find Available Rooms - Results

Manage Room Bookings

This page is accessible to users with Administrator or Facility Admin role only. It allows these administrators to edit and delete current room bookings (see figure 1.12 below) even when the bookings belong to other users.

To access this page, you can click on Room Admin > Manage Bookings link in the Left Menu.

Note:

The links in the Left Menu are access trimmed according to the sign-in users' role(s). User can only see links to pages that they have access to.



EO	PLEO RMS	<u>≡</u> £				😤 Pleodata	- RMS Tenant 1 (default)	John Chan (0365) 👻 🧕
Navig	gation	Room Admin > Man	age Bookings					
ø	Dashboard							
	Calendar >	Current Room Bookings					Search bookings	Q
	Book Resource Reports	Room Name	Description	Start Date	End Date	Booked By	Status	Action
	Room Admin 🗸 🗸	Room C (Cap 20)	Repeated Booking Test	30-Aug-2017 09:00 AM	30-Aug-2017 11:00 AM	John Chan (O365)	Pending Approval	Edit Delete
	Manage Bookings	Room C (Cap 20)	Repeated Booking Test	31-Aug-2017 09:00 AM	31-Aug-2017 11:00 AM	John Chan (0365)	Cancelled	Edit Delete
	Manage Rooms	Room C (Cap 20)	Repeated Booking Test	01-Sep-2017 09:00 AM	01-Sep-2017 11:00 AM	John Chan (0365)	Pending Approval	Edit Delete
	Manage Booking Rulesets	PleoData Office (HQ)	Test PR#95	16-Oct-2017 08:00 AM	16-Oct-2017 09:00 AM	RMS PleoData (Google)	Booked	Edit Delete
	Resource Admin >	PleoData Office (HQ)	Test BizRules #68	17-Nov-2017 08:00 AM	17-Nov-2017 09:00 AM	Kenneth Ylaya (O365)	Cancelled	Edit Delete
	Analytics >	Showing 6 to 10 of 10 bookings					First Previous	1 2 Next Last

Figure 1.12: Manage Room Bookings

To edit or delete a room booking, you can click on the "Edit" or "Delete" button besides the booking, and the respective modal dialog will be displayed.

For rooms that require booking approval, the "Edit Room Booking" modal dialog will only allow the administrators to either approve or reject the booking (see figure 1.13 below).

<u>ت</u> ۵			🏶 Pleodata - RM	S Tenant 1 (default) 🖉 🖉	John Cl
Room Admin >	Room Booking Approval (ID:	87)	×		
	Room Name	Room C (Cap 20)			
Current Room Bool	Room Capacity	20			
Room Name	Location	Vertex Tower A			
PleoData Office (HQ)	F&B Request				
Room B (Cap 5)	Start Date Time	29-Aug-2017 09:00 AM			
Room C (Cap 20)	End Date Time	29-Aug-2017 11:00 AM			
Room C (Cap 20)	Description	Repeated Booking Test			
Room A (Cap 12)	Status	Pending Approval			
Showing 1 to 5 of 10 boc		Approve Reject Close			

Figure 1.13: Room Booking Approval

Note:

Delete room booking function is available to Administrator and Facility Admin users only. Once a room booking is deleted, it will not be visible in the application.



Manage Rooms

This page is accessible to users with Administrator or Facility Admin role only. It allows these administrators to create, edit and delete rooms (see figure 1.14 below).

Room Booking > M	lanage Rooms					
+ New					Search roo	ms (
Room Name 🔺	Location	Room Capacity	Is Active	Created Date	Modified Date	Action
PleoData Office (HQ)	Vertex Tower A	20	Yes	30-Mar-2017 05:03 PM	14-Aug-2017 03:45 PM	Edit Delete
Room A (Cap 12)	Vertex Tower A	12	Yes	26-Jan-2017 12:00 AM	20-Jul-2017 01:53 PM	Edit Delete
Room B (Cap 5)	Vertex Tower A	5	Yes	01-Feb-2017 11:03 PM	20-Jul-2017 01:53 PM	Edit Delete
Room C (Cap 20)	Vertex Tower A	20	Yes	02-Feb-2017 04:03 PM	14-Aug-2017 03:45 PM	Edit Delete
Room D (Cap 5)	Site Office	5	Yes	13-Feb-2017 01:00 PM	23-Aug-2017 03:11 PM	Edit Delete
Room E (Cap 40)	Vertex Tower A	40	Yes	13-Feb-2017 01:01 PM	28-Jul-2017 10:58 AM	Edit Delete
Showing 1 to 6 of 6 Rooms					First	Previous 1 Next La

Figure 1.14: Room Admin – Manage Rooms

You can create a new room by clicking on the "New" button at the top-left corner of the main panel. And the "Create Room" modal dialog will be displayed (see figure 1.15 below).

Once you have filled in the necessary information, you can click the "Create" button to create the room.

When you are creating a new room, you can associate an existing room as an adjacent room. This will allow users to book 2 adjacent rooms in a single submission. Typically, these adjacent rooms share a partition wall that can be removed or folded, to form a bigger single room.

You can also specify whether the new room requires booking approval.



<u>م</u>		希 Pleodat	a - RMS Tenant 1 (default) 🚽 🥙 John Chan (0365) 👻 🎴
Room Booking	Create Room		×
	Name*		
+ New	Location*	¥	s Q
Room Name 🔺	Туре*		Action
PleoData Office (HQ)	Seating Capacity*		Edit Delete
Room A (Cap 12)	Description		Edit Delete
Room B (Cap 5)	Is Active		Edit Delete
Room C (Cap 20)	Facilities	Electrical Point Internet Access Tele-Conference	Edit. Delete
Room D (Cap 5)		LCD Projector Media Player Video Conference	Edit Delete
Room E (Cap 40)	Booking Rule Set*	type the rule set name to select	Edit Delete
Showing 1 to 6 of 6 Roon	Adjacent Room	type the room name to select a room	Previous 1 Next Last
	Hourly Rate (SS)		
	Approval Required	Ves 💿 No	
		Create Close	
			_

Figure 1.15: Room Admin – Create Room

You can edit a room by clicking on the "Edit" button besides the required room. And the "Edit Room" modal dialog will be displayed (see figure 1.16 below).

Once you have make the necessary changes, you can click on the "Save" button to save the changes.



<u> </u>	_	# Pleos	lata - RMS Tenant 1 (default) 🖉 John Chan (O365)
Room Booking	Edit Room		×
	Name*	PleoData Office (HQ)	
+ New	Location*	Vertex Tower A	ms
Room Name 🔺	Type*	Board Room	Action
PleoData Office (HQ)	Seating Capacity*	20	Edit Delete
Room A (Cap 12)	Description	This is a board room, meant for corporate level meetings.	Edit Delete
Room B (Cap 5)	Is Active	Yes No	Edit Delete
Room C (Cap 20)	Facilities	Electrical Point Internet Access Tele-Conference	Edit Delete
Room D (Cap 5)		LCD Projector Media Player Video Conference	Edit Delete
Room E (Cap 40)	Booking Rule Set*	Default Booking Rule Set	Edit Delete
Showing 1 to 6 of 6 Roc	Adjacent Room	Room C (Cap 20)	Previous 1 Next
	Hourly Rate (SS)		
	Approval Required	• Yes No	
	Modified Date	14-Aug-2017 03:45 PM	
	Modified By	John Chan (0365)	
© 2017 PleoData Pte Ltd. A		Save Close	version: 1.0.

Figure 1.16: Room Admin – Edit Room

Similarly, to delete a room, you can click on the "Delete" button for the required room. And the "Delete Room" modal dialog will be displayed. To complete the delete action, click on the "Delete" button in the modal dialog.

If the operation is successful, a success toaster notification will be displayed.



Chapter 2: Resource Booking

Besides room booking, the application also allows business to manage shared items (e.g. Audio-video equipment, books etc.) that can be borrowed by their staffs for defined periods.

In our application, the term "Resource" can be used as a general term for facilities such as rooms, and "share items". However, in the context of the Left Menu and in this chapter, it refers specifically to "shared items".

The main distinction between room and resource bookings, is that resource booking lifecycle involves the additional process of issuing and returning of booked resources.

Book Resource

You can search and book available resources in the Book Resource page. This page is accessed by clicking on the "Book Resource" link in the Left Menu (see figure 2.1 below).

EO	프 오			or Pleodata - RMS Tenant 1 (default)	🖍 🛛 John Chan (0365) 👻 🧲
ø	Book Resource				
iii ♦	Search Available Resource(s)				
	Resource Type	All Types 🔻	Location	All locations 🔻	
	Start Date Time	25-Aug-2017	End Date Time	01-Sep-2017	
		Clear Search			
.lı					
¢					

Figure 2.1: Book Resource Page

To find the available resource(s) for required loan period, you can select the required "Resource Type", and the Start and End date times. Once the search criteria are selected, click on the "Search" button to display the matching available resources.

If there are matching resources that meet your search criteria, the search results will be displayed beneath the "Search Available Resource(s)" box (see figure 2.2 below).

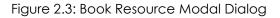


Book Resource						
Search Available Resour	ce(s)					
Resource Start Date		ment •	Location End Date Time	All locations 01-Sep-2017	•	
Available Resource S					Search available	
Resource Code	Resource Name	Resource Type	Location (Collection / Re	eturn) Resource	e Current Status	Action
TV01	Flat Screen TV 42"	Audio Video Equipment	Vertex Tower A	Available		Book
NECPRJ01	NEC PROJECTOR	Audio Video Equipment	Vertex Tower A	Available		Book
AV002	Portable LCD Screen	Audio Video Equipment	Vertex Tower A	Available		Book
	ngs				First Pre	evious 1 Next Las

Figure 2.2: Available Resource Search Results

To book a resource, you can click on the "Book" button for required resource. And the "Book Resource" modal dialog will be displayed (see figure 2.3 below). To complete the book action, click on the "Submit" button.

rce		Book Resource			😤 Pleo	data - _R MS Tena ×	ant 1 (default)	£	John Chan (O3
		Code	TV01						
e Resource(s)		Name	Flat Screen TV	42"					
Resource Type		Location	Vertex Tower A	l			¥		
itart Date Time		Resource Type	Audio Video Eq	uipment					
		Loan Start Date	25-Aug-2017 09	9:00 AM					
		Loan End Date	01-Sep-2017 05	5:00 PM					
ource Search			Submit Clo	ose					
le Re	source Name	nesource ryp		coration (concernor	ny neuroy	nesource Ci			
Fl									
NE	C PROJECTOR	Audio Video E	quipment	Vertex Tower A		Available			Book





If the booking operation is successful, a success toaster notification will be displayed. And the booked resource will be removed from the "Available Resource Search Results" (see figure 2.4 below).

ok Resource		Create Resource Book Resource Booking (res	cing ource code: TV01) has been created s	× successfully.				
earch Available Reso	urce(s)							
Resour	ce Type Audio Video	Equipment 🔻	Location	All locations		v		
Start Da	te Time 25-Aug-2017	#	End Date Time	01-Sep-2017	I	**		
	Clear Sea	arch						
ailable Resource	Search Results					Search available	resources	C
								Ŭ
Resource Code	Resource Name	Resource Type	Location (Collection / R	eturn)	Resource Curr	ent Status	Action	
	Resource Name	Resource Type Audio Video Equipment	Location (Collection / R	eturn)	Resource Curr Available	ent Status	Action Book	
NECPRJ01				eturn)		ent Status	_	
Resource Code NECPRJ01 AV002 owing 1 to 2 of 2 bool	NEC PROJECTOR Portable LCD Screen	Audio Video Equipment	Vertex Tower A	eturn)	Available		Book	Last

Figure 2.4: Book Resource Success Message

Resource Booking Calendar

You can view your resource bookings in the Calendar – Resource Booking page. This page can be accessed by clicking on the Calendar > Resource Booking link in the Left Menu (see figure 2.5 below).

This page will only display resource bookings belonging to the sign-in user. Each entry will indicate the name of booked resource and the current booking status e.g. "Reserved", "Issued" or "Returned".



EO	PLEO RMS	<u>ت</u> ۵				🖨 Pleodata - RMS Ten	ant 1 (default)	John Chan (0365) 👻
	gation	Calendar > Resou	Irce Booking					
	Dashboard		-					
=	Calendar v	+ Add						
	Room Booking	<.			AUGUST 2017			>
	Resource Booking	Sun	Mon	Tue	Wed	Thu	Fri	Sat
۵	Book Resource	30		1	2	3		4 5
:=	Reports >	L	9a Zoo Pass 1 [Returned]					
	Room Admin >	6 Zoo Pass 1 [Returned]	7	8	9 National Day	10	1	1 12
	Resource Admin >		9a NEC PROJECTOR [Returned]					
di	Analytics >	13	14	15	16	17	1	8 19
۰	Administration \rightarrow	20	21	22	23	24	2	5 26
							9a Flat Screen TV 42" [Reserv	ved]
		27	28	29	30	31		
		Flat Screen TV 42" [Reserved]						
			9a Portable LCD Screen [Reserve	ed]				
							Hari Raya Haji	
		3 Portable LCD Screen [Reserved]						

Figure 2.5: Resource Booking Calendar

If you mouse-over an entry, you will see further details regarding the booked resource e.g. the resource code and the due date (see figure 2.6 below).

20	21		23 42" (TV01), due
27	28	on 01-Sep-20	17 [Reserved] 30
Flat Screen TV 42" [Reserved]			
	9a Portable LCD Screen [Reserved]		
	4		
Portable LCD Screen [Reserved]			

Figure 2.6: Resource Booking Tooltip

To view more details or edit a booking, you can click on the booking entry in the calendar, and the "Edit Resource Booking" modal dialog will be displayed (see figure 2.7 below).



· 프 요			🖀 Pleodata - RMS Tenant 1 (default) 🛛 🖉 John
Calendar >	Edit Resource Booking		×
	Code	AV002	
+ Add	Name	Portable LCD Screen	
<	Location	Vertex Tower A	
Sun	Resource Type	Audio Video Equipment	Fri 4
	Loan Start Date	28 Aug 2017 09:00 AM	
Zoo Pass 1 [Returned]	Loan End Date	04 Sep 2017 05:00 PM	11
	Loan Status	Reserved	18
		Save Cancel Close	25
			veen TV 42" [Reserved]
	27	28 29 30	31 1

Figure 2.7: Edit Resource Booking

You can edit the loan period or cancel the booking (if the loan status is "Reserved") in this modal dialog. If you cancel a booking, it will no longer visible from the calendar.

For bookings with "Issued" or "Returned" status, the modal dialog will only allow you to view the booking details. And only the "Close" button is visible.

Manage Resource Bookings

This page is accessible to users with Administrator or Resource Admin role only. It allows these administrators to update and delete resource bookings (see figure 2.8 below) even when the bookings belong to other users.

To access this page, you can click on Resource Admin > Manage Bookings link in the Left Menu.

EO	亘 2			🚜 Pleodata - RMS Tenant 1 (default)	🖋 John Chan (0365) 👻
Ø	Resource Admin > Man	age Bookings			
■	Search Resource Bookings				
:=	Resource Type	All Types 🔻	Location	All locations v	
	Start Date Time	25-Aug-2017	End Date Time	01-Sep-2017	
-		Clear Search			
ab					
٠					

Figure 2.8: Manage Resource Booking



To update a resource booking, you can click on the "Edit" button for the required booking. And the "Update Resource Booking" modal dialog will be displayed (see figure 2.9 below).

					ä	<u>Pleod</u> ata - RM:	S Tenant 1 (default)
Man	age Bookin	Update Resource B	ooking			×	
		Code	CP002				
		Name	Sentosa Pass 1				
Гуре		Location	Vertex Tower A				Y
lime		Resource Type	Corporate Pass				**
		Loan Start Date	21-Aug-2017 09:0	10 AM			
		Loan End Date	04-Sep-2017 05:0	10 PM			
rch Res		Loan Status	Issued				Search resource
Resou	urce Name		Return Close	2			Loan Status
Sento			_			_	Issued
Flat S							Reserved

Figure 2.9: Update Resource Booking

The displayed button(s) is dependent on the current booking status. If the status is "Issued" then the administrators can only perform the "Return" action. Or click on the "Closed" button to close the modal dialog without performing any action on the booking.

Similarly, to delete a booking, you can click on the "Delete" button besides the required booking. Note that you can only delete a resource booking when the status is "Reserved".

Manage Resources

This page is accessible to users with Administrator or Resource Admin role only. It allows these administrators to create, edit and delete resources (see figure 2.10 below).



Empowering Enterprises for Greater Success

New Resource C AV002 CP001	•	Resource Type	Location (Collection / Return)	Search res Resource Status	ources C Action
Resource C AV002 CP001	Code 🔺 Resource Name				
Resource C AV002 CP001	Code 🔺 Resource Name				
AV002 CP001				Resource Status	Action
CP001	Portable LCD Screen	Audio Video Equipment			
			Vertex Tower A	Available	Edit Delete
	Zoo Pass 1	Corporate Pass	Vertex Tower A	Available	Edit Delete
CP002	Sentosa Pass 1	Corporate Pass	Vertex Tower A	On-loan	Edit Delete
NECPRJ01	NEC PROJECTOR	Audio Video Equipment	Vertex Tower A	Available	Edit Delete
TV01	Flat Screen TV 42"	Audio Video Equipment	Vertex Tower A	Available	Edit Delete
Showing 1 to !	5 of 5 Resources			First	st Previous 1 Next Las

Figure 2.10: Manage Resources

You can create a new resource by clicking on the "New" button at the top-left corner of the main panel. And the "Create Resource" modal dialog will be displayed (see figure 2.11 below).

Once you have filled in the necessary information, you can click the "Create" button to create the new resource.

	_			A Pleodata - RMS Tenant 1 (c	iefault)	x ²	John Chan (O3
nin >	Creat	te Resource			×		
	C	Compulsory fields are ma	rked with asterisk (*).				
		Name*			sour		
		Type*		v			
		Location*		v			
		Resource Code*					
		Booking Rule Set*	type the rule set name to select				
			Create Close				
			Close Close				
esources							

Figure 2.11: Create Resource

You can edit a resource by clicking on the "Edit" button besides the required resource. And the "Edit Resource" modal dialog will be displayed (see figure 2.12 below).



Once you have make the necessary changes, you can click on the "Save" button to save the changes.

<u>며</u> 오		8	Pleodata - RMS Tenant 1 (default)	🖌 John Chan (0365)	- (2)
Resource Admin >	Create Resource		×		
	Resource Code*	AV002			
+ New	Name*	Portable LCD Screen	501		
Resource Code 🔺	Type*	Audio Video Equipment			
AV002	Location*	Vertex Tower A			
CP001	Booking Ruleset*	Default Resource Booking Rule Set			
CP002	Status	Available			
NECPRJ01	Created Date	01-Aug-2017 04:44 PM			
TV01	Modified Date	23-Aug-2017 02:56 PM			
Showing 1 to 5 of 5 Resources	Modified By	John Chan (O365)	st		
		Save Close			
			_		

Figure 2.12: Edit Resource

Similarly, to delete a resource, you can click on the "Delete" button for the required resource. And the "Delete Resource" modal dialog will be displayed. To complete the delete action, click on the "Delete" button in the modal dialog.

If the operation is successful, a success toaster notification will be displayed.



Chapter 3: Reports

Room Bookings

This page is accessible to all users. To access this page, you can click on the Reports > Room Bookings in the Left Menu. And the Reports - Room Bookings page will be displayed (see figure 3.1below).

You can generate reports on the room bookings and export the results as CSV format. But only users with Administrator or Facility Admin role can view room bookings belong to other users.

The rest of the users will only see their own bookings in the generated reports.

EO	PLEO RMS	<u>ت</u> ۵				🖀 Pleodata - RMS Tenant 1 (default)	2	John Chan (0365) 👻 🧕
Navig	zation Dashboard	Reports > Room Boo	king					
1	Calendar >	Report Criteria Selection						
•	Book Resource Reports ~	Booking Start Date	25-Aug-2017	#	Room Location	All locations	•	
	Room Booking	Booking End Date		m	Booking Status	All Status	•	Clear Search
	Resource Booking							
	Room Admin >							
	Resource Admin >							
di	Analytics >							
¢	Administration \rightarrow							

Figure 3.1: Reports - Room Booking Page

You can generate reports with the following filters;

- a. Booking Start Date
- b. Booking End Date
- c. Room Location
- d. Booking Status

By default, the Booking Start Date is set to the current date, and Room Location and Booking Status default values are "All locations" and "All Status" respectively.

Once you have selected the necessary filter values, you can click on "Search" button to generate the report. The report results are displayed in a table format below the "Report Criteria Selection" box (see figure 3.2 below).

To export the results as a CSV file, you click on the "Export to CSV" button on the top-right corner of the Search Results table.



	t Criteria Selection						
	Booking Start Date	25-Aug-2017		Room Location	All locations	•	
	Booking End Date	#		Booking Status	All Status	Ŧ	Clear Search
Searc	h Results						Export to CSV
S/N	Room	Title	Location	Start	End	Status	Booked By
1	PleoData Office (HQ)	Test Waiting List1	Vertex Tower A	25-Aug-2017 08:00 AM	25-Aug-2017 10:00 AM	Booked	Amos Tan (Google)
2	Room B (Cap 5)	Product Review	Vertex Tower A	25-Aug-2017 10:00 AM	25-Aug-2017 12:00 PM	Booked	Amos Tan (Google)
3	Room C (Cap 20)	Repeated Booking Test	Vertex Tower A	28-Aug-2017 09:00 AM	28-Aug-2017 11:00 AM	Booked	John Chan (0365)
4	Room C (Cap 20)	Repeated Booking Test	Vertex Tower A	29-Aug-2017 09:00 AM	29-Aug-2017 11:00 AM	Pending Approval	John Chan (0365)
	Room A (Cap 12)	Reserve room for documentation	Vertex Tower A	29-Aug-2017 10:00 AM	29-Aug-2017 11:00 AM	Booked	John Chan (0365)



Resource Bookings

This page behaves in a similar fashion with the Room Booking Report page.

Users can generate reports on the resource bookings and export the results as CSV format. But only users with Administrator or Resource Admin role can view resource bookings belonging to other users. The rest of the users will only see their own bookings in the generated reports.

To access this page, you can click on the Reports > Resource Bookings in the Left Menu. And the Reports - Resource Bookings page will be displayed (see figure 3.3 below).

EO PLEO RMS	這 &			🖨 Pleodata - RMS Tenant 1 (default)	🖋 John Chan (0365) 👻 🧧
Navigation	Reports > Resource E	Booking			
② Dashboard					
🗮 Calendar >	Report Criteria Selection				
💧 Book Resource	Resource Code		Resource Type	All Types 🔹	
Reports ~	Booking Start Date	25-Aug-2017	Location (collection/return)	All locations 🔻	
Resource Booking	Booking End Date	#	Booking Status	All Status 🔹	Clear Search
🚦 Room Admin >					
📑 Resource Admin 🔿					
Analytics >					
💠 Administration >					

Figure 3.3: Reports - Resource Booking



You can generate reports with the following filters;

- a. Booking Start Date
- b. Booking End Date
- c. Resource Code
- d. Resource Type
- e. Location (collection/return)
- f. Booking Status

By default, the Booking Start Date is set to the current date, and Resource Type, Location and Booking Status default values are "All Types", "All locations" and "All Status" respectively.

Once you have selected the necessary filter values, you can click on "Search" button to generate the report. The report results are displayed in a table format below the "Report Criteria Selection" box (see figure 3.4 below).

To export the results as a CSV file, you click on the "Export to CSV" button on the top-right corner of the Search Results table.

	Criteria Selection								
	Resource Code			Res	source Type	All Types	Ŧ		
	Booking Start Date	25-Aug-2017		Location (collection/return)		All locations 🔻			
	Booking End Date		#	Booking Status		All Status 🔻		Clear Search	
earch	Results							Export to CS	
earch N	Results Resource Code	Resource Name	Start Date	End Date	Issued Date	Returned Date	Booking Status	Export to CS Booked By	
		Resource Name	Start Date 21-Aug-2017	End Date 04-Sep-2017	Issued Date	Returned Date	Booking Status		
	Resource Code						-	Booked By	

Figure 3.4: Reports - Resource Booking Results



Chapter 4: Analytics - Room Bookings

The application provides the following room booking analytics reports. And it is accessible by clicking on the Analytics – Room Booking link in the Left Menu.

These reports are accessible to users with Administrator or Facility Admin role only.

Yearly Comparison

By default, the Yearly Comparison charts are displayed when users click on the Analytics – Room Booking link.



Figure 4.1: Room Booking Analytics – Yearly Comparison

This page contains 2 stack bar charts that show room utilization for the previous and current year, side-by-side for easy comparison.

Each chart show the room utilization in percentage, categorised by "Confirmed Booking", "No-show Booking" and "Not Utilized", for each month in the year.

KPI Charts

To view the KPI Charts, you can click on the "KPI Charts" button in the Top-Right corner of the main panel.

The following KPIs are displayed for the current year;

- a. Confirmed Bookings vs Available Hours (percentage)
- b. Cancelled Bookings vs Total Bookings (percentage)
- c. No-Show Bookings vs Available Hours (percentage)



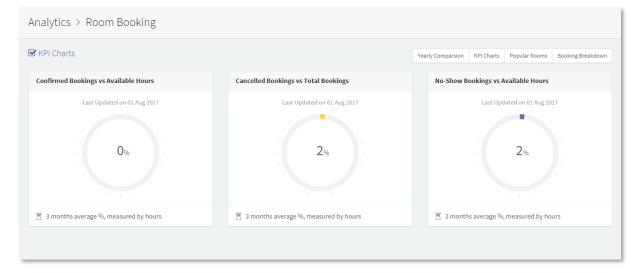


Figure 4.2: Room Booking Analytics – KPI Charts

Popular Rooms

This page contains 2 bar charts displaying the top 3 most popular rooms, and the top 3 least popular rooms, for the last 3 months.

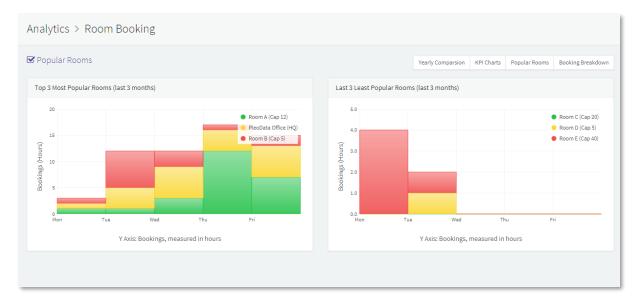


Figure 4.3: Room Booking Analytics – Popular Rooms

The charts display the bookings measured by hours and grouped by day of the week. This also indicates which week days are the most heavily booked among the popular rooms.



Booking Breakdown

This page contains two donut charts; display the total bookings over 3 months, grouped by Department and Day of the Week.

Analytics > Room Booking	
☑ Booking Breakdown	Yearly Comparsion KPI Charts Popular Rooms Booking Breakdown
Room Bookings By Department (last 3 months)	Room Bookings By Day of Week (last 3 months)
PHO 2019 0 Sales 0 ps Engineering: 76%	Honday Titesday 17% Honday 12% Honday 12% Tuesday 20% Tuesday 20% Tuesday 20%
Reasured by hours	

Figure 4.4: Room Booking Analytics – Booking Breakdown

This charts allow us to identity which departments are heavy room users. And which days of the week are booked most frequently.



Chapter 5: Administration

The pages for the Administration module are accessible to users with Administrator role only.

Manager Users

To view this page, you can click on the Administrator > Manage Users link in the Left Menu, and the following page is displayed (see figure 5.1 below).

EO I	PLEO RMS	đ	₽			脅 Ple	odata - RMS Tenant 1 (default) 🛛 🖌	* John Chan (0365) 👻
		A	dministration > N	lanage Users				
	Dashboard	-						
= (Calendar >		+ New				Search user	s Q
۰	Book Resource							
ii (Reports >		Display Name	Department	Login Name	Email	Permissions	Action
	Room Admin >		Amos Tan	Engineering			Administrator	Edit Delete
1	Resource Admin >		Amos Tan (Google)	Ops	techo Canadi anno		User	Edit Delete
di 4	Analytics >		Chen Yue	Engineering		danay - Opine data and	Administrator	Edit Delete
	Administration 🗸		Chua Hui Lin	PMO		lin church in churchan	Administrator	Edit Delete
	Manage Users Manage Locations		Eric Ong (O365)	PMO		Contraction of the second second	User	Edit Delete
			Hnin Aye Khine	Engineering	His Option Liberton		User	Edit Delete
			John Chan (0365)	Engineering	ерессение		Administrator	Edit Delete
			Showing 1 to 7 of 21 Users				First Previous	1 2 3 Next Last

Figure 5.1: Administration – Manage Users

To create a new user account, you can click on the "New" button in the top-left corner of the main panel and the "Create New Account" modal dialog will be displayed (see figure 5.2 below).

Once the necessary information is entered and the role(s) assigned, you can click on the "Save" button to create the new user account.

Note:

The value entered in the Login Name field must belong to a valid Microsoft account. Our application does not store user passwords or perform authentication. Authentication is performed against Azure AD.



<u>م</u> ا			骨 Pleodata	- RMS Tenant 1 (default)	John Chan (O3
Create User Ac	count			×	
Fields mar	ked with asterisk ar	e compulsory field.			
+	Login Name*			rch user:	
Dis	Display Name*				
Am	Department*				
Che	Email*				
Chi		t Some Options			
Eric	Sav	e Close			

Figure 5.2: Administration – Create User Account

To edit a user account, you can click on the "Edit" button for the required user account. And the "Edit User Account" modal dialog is displayed (see figure 5.3 below).

<u>م</u>				🖀 Pleodata - RMS Tenant 1 (defau	lt) 🖉
	er Account			×	
Admi		-			
	Login Name				
+	Display Name	John Chan (O365)			rch users.
Dis	Department	Engineering			
Am	Email				
Am	User Role(s)*	Administrator ×			
Che		Save Close			r
Churanorem	THO	nunn.cnua@pieouata.com	nunmenua@preouae	a.com Auministrati	r
Eric Ong (O365)					
Hnin Aye Khine	Engineering	khine@pleodata.com	khine@pleodata.com	User	

Figure 5.3: Administration – Edit User Account

Similarly, to delete user account, you can click on the "Delete" button besides the required user account. And the "Delete User Account" modal dialog will be displayed. Click on the



"Delete" button in the modal dialog to complete the delete action. If the delete operation is successful, a success toaster notification will be displayed.

Manage Locations

This page allows administrators to create and edit locations. Location values are master data for the application; used by facility and resource records. The Edit and Delete functions are similar to other modules, and follow the same implementation patterns.

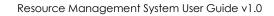
EO PLEO RMS	三			希 Pleodata - RMS Tenant 1 (defa	🛠 Pleodata - RMS Tenant I (default) 🛛 🖋 🛛 John Chan (0365) 👻 🌏		
Navigation	Room Booking >	Manage Locations					
🔭 Dashboard							
🗮 Calendar >	+ New			Se	earch locations Q		
🗮 Reports >	Location ID	Location Name 🔺	Created Date	Modified Date	Action		
📰 Room Admin >	4	Marina Bay Office	01-Jun-2017 04:41 PM	15-Jun-2017 12:52 PM	Edit Delete		
🚆 Resource Admin >	3	Site Office	02-Feb-2017 04:04 PM	01-Jan-0001 12:00 AM	Edit Delete		
Analytics >	2	Vertex Tower A	24-Jan-2017 12:00 AM	16-Mar-2017 02:29 AM	Edit Delete		
Administration ~ Manage Users	Showing 1 to 3 of 3 Room	s			First Previous 1 Next Last		
Manage Locations							
Manage Settings							

Figure 5.4: Administration – Manage Locations

Manage Settings

This page allows administrators to edit application settings. These are application wide configuration settings. For example, you can modify the sender email address setting that appears in the email notifications sent by the application, to reflect your organization.

The Edit function is similar to other modules, and follow the same implementation patterns.





EO PL	LEO RMS	<u>ت</u> ۵		脅 Pleodata - F	RMS Tenant 1 (default) 🧳 John Chan (0365) 👻 🧧
Navigation	n	Administration >	Manage Settings		
🕐 Das	shboard				
🚞 Cal	lendar >				Search settings Q
-	ok Resource	Code	Description	Value	Action
	ports > om Admin >	from_email	System Sender Email Address	no-reply@pleodata.com	Edit Delete
	source Admin >	FnB_Email_Recipients	F&B Recipient Email List (e.g. food@test.com; beverages@example.com))	Edit Delete
🔒 Ana	alytics >	locale	ISO Locale Setting	en-SG	Edit Delete
	ministration ~ nage Users	Showing 1 to 3 of 3 Setting	15		First Previous 1 Next Last
Mar	nage Locations				
Mar	nage Settings				

Figure 5.5: Administration – Manage Settings