

BRTSys
PDM Outlook
Add In



BRTSys PDM Outlook Add In User Guide

[Home](#) » [BRTSys](#) » BRTSys PDM Outlook Add In User Guide 

Contents

- [1 BRTSys PDM Outlook Add In](#)
- [2 Product Information](#)
- [3 Product Usage Instructions](#)
- [4 Getting Started with Outlook Add-In](#)
- [5 Appendix](#)
- [6 Revision History](#)
- [7 Documents / Resources](#)
 - [7.1 References](#)
- [8 Related Posts](#)

BRTSys

BRTSys PDM Outlook Add In



Product Information

Specifications:

- **Part:** Outlook Add-In
- **Version:** 3.7.0-3.5.0
- **Document Version:** 2.0
- **Issue Date:** 20-05-2024
- **Document Reference No.:** BRTSYS_000119
- **Clearance No.:** BRTSYS#080

Product Usage Instructions

1. Getting Started with Outlook Add-In

1. Installing Outlook Add-In

Follow the installation instructions provided in the guide to install the Outlook Add-In.

2. Configure Outlook Add-In

Configure the settings of the Outlook Add-In as per your preferences by following the steps outlined in the guide.

3. Profile

Set up your profile within the Outlook Add-In by entering relevant information as instructed in the guide.

4. Find a Person

Use the search functionality to find a person within the Outlook Add-In.

5. Desk Booking

Book a desk using either the Maps View or List View options provided in the Add-In.

1. Booking Desk using Maps View

Follow the steps outlined for booking a desk using the Maps View feature.

2. **Booking Desk using List View**

Follow the instructions for booking a desk using the List View feature.

3. **Other Booking Functions**

Explore additional booking functions like viewing, editing, canceling, extending, and ending bookings as per your requirements.

1. View and Edit Booking
2. Cancel Booking
3. Extend Booking
4. End Booking

4. **My Bookings**

Access and manage your bookings through the designated section in the Outlook Add-In.

5. **Feedback**

Provide feedback on your experience with the Add-In to help improve its functionality.

6. **About**

Find more information about the Outlook Add-In and its features in this section.

2. **Appendix**

Refer to the appendix for additional details and resources related to the Outlook Add-In.

Frequently Asked Questions (FAQ)

• **Q: How can I update the Outlook Add-In to the latest version?**

A: To update the Outlook Add-In, check for any available updates within the Add-Ins section of Outlook and follow the prompts to install the latest version.

• **Q: Can I use the Add-In on multiple devices simultaneously?**

A: The ability to use the Add-In on multiple devices simultaneously may vary based on your organization's licensing and configuration settings. Refer to your IT department for specific guidelines.

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About This Guide

This guide explains the usage of PDM Outlook Add-Ins. The screenshots used are for illustration purposes only.

Intended Audience

The intended audience is System Integrators and technical / Administrative users who will assist in realizing the capabilities, functions, and the full benefits of the product.

Document References

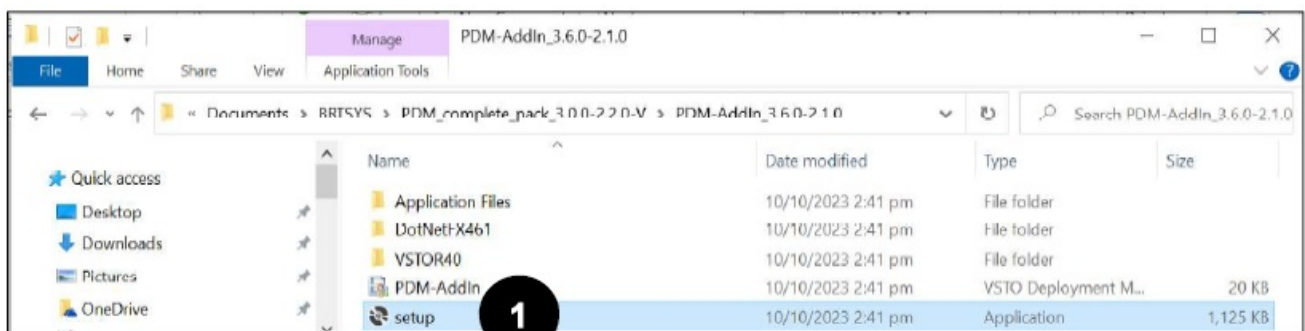
Document Name	Document Type	Format
BRTSYS_AN_044_PDM User Guide – 1. Introduction	Application Note/User Guides	PDF
BRTSYS_AN_045_PDM User Guide – 2. Installation and Configuration		
BRTSYS_AN_046_PDM User Guide – 3. PDM Management Console and Desk Viewer		
BRTSYS_AN_047_PDM User Guide – 4. Mobile Client App and PanL PD35 L Display		

Getting Started with Outlook Add-In

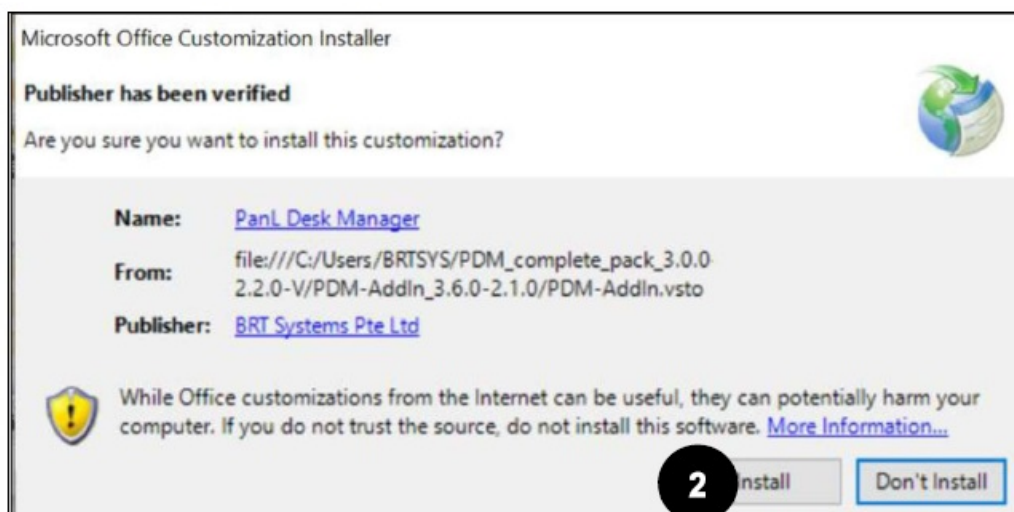
Installing Outlook Add-In

The Microsoft Outlook Add-In provides an alternative option for users to view and book desk(s) from the calendar aside from the mobile app.

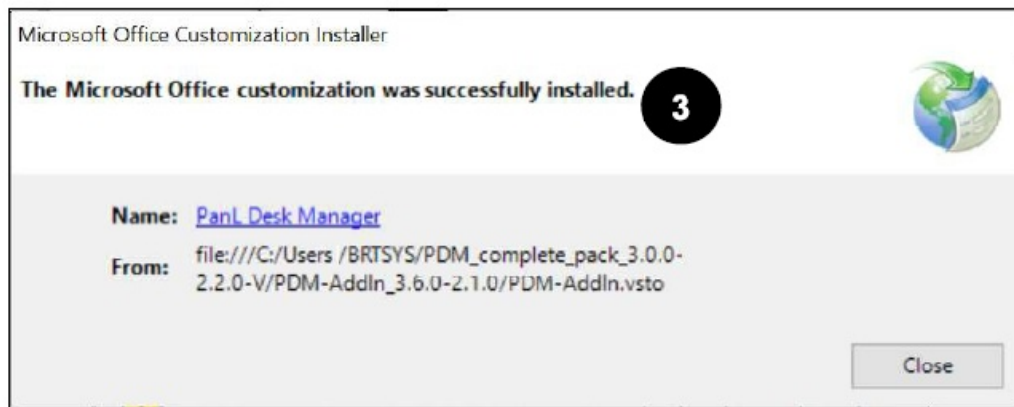
1. Extract or unzip the PDM- Add-In package file provided and execute the .exe file. Ensure that .net framework v4.6.6 or newer is preinstalled. Click Setup.



2. Once the installation pop-up appears, click [Install].



3. Upon successful installation, an appropriate message indicating the same is displayed.



Note:

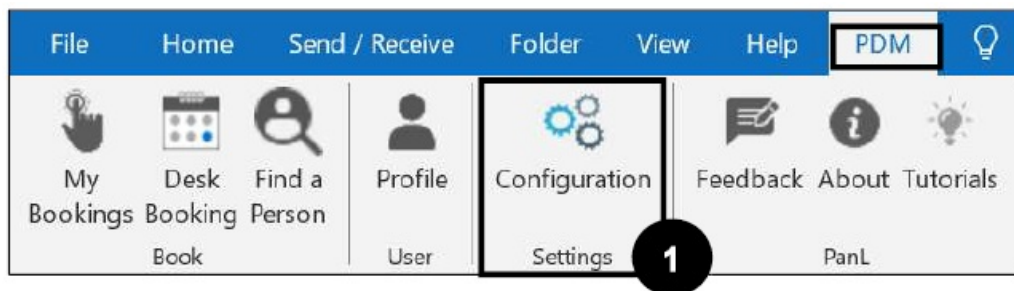
The PDM tab may not appear as part of the menu after installation due to Outlook disabling the Add-In. This issue can be resolved by removing PDM Add-Ins from Outlook's blacklist. In Outlook, go to File > Manage COM Add-ins. Under PanL Desk Manager, click the "Options" dropdown, select "Always enable this add-in" and click "Apply".


Configure Outlook Add-In

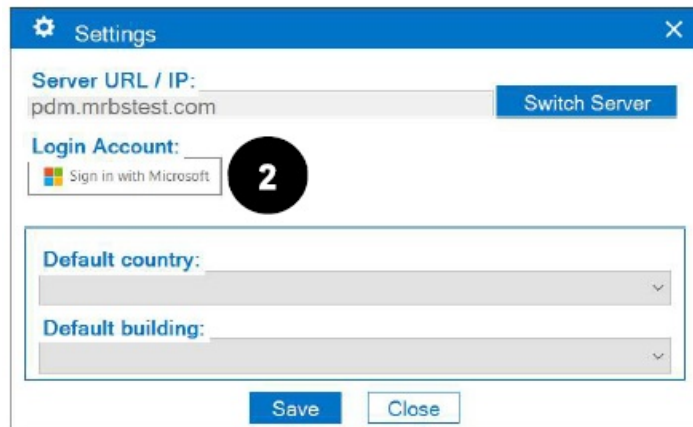
Using a valid MS-Outlook email account, log in to Outlook calendar, the Add-In should appear as a tab on the top bar.

To configure the Add-In Settings

1. From the top bar menu, click PDM > Configuration.



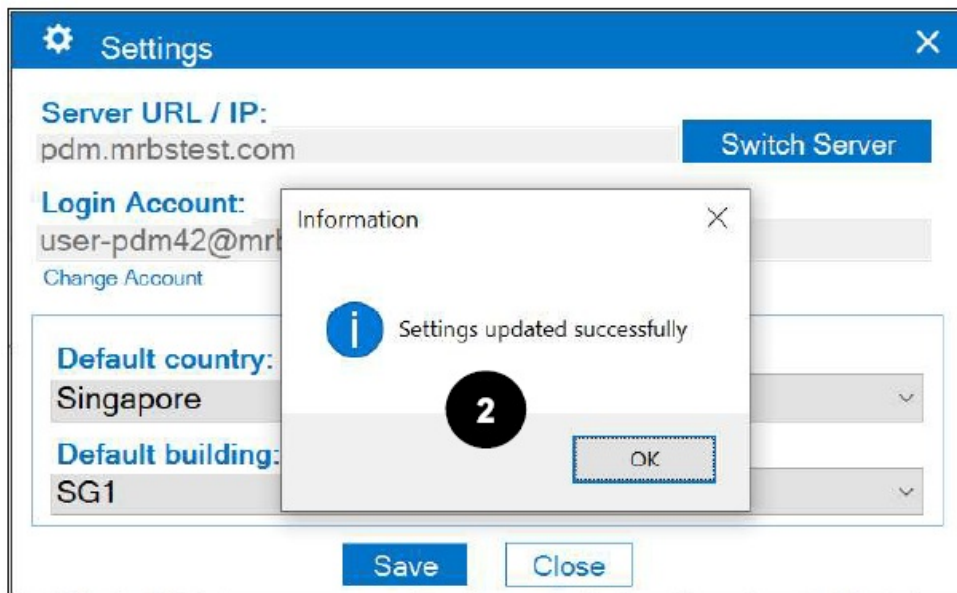
2. Add/update the following information, as required
 - By default, the PDM Server URL/IP is displayed. To access a different PDM Server URL/IP, click [Switch Server]. Enter the New URL/IP manually (if the Outlook client PC is not part of a local PDM network) or click on the Discover  button to detect the PDM Server URL/IP automatically and click [Change].



- Click [Sign in with Microsoft] to login with the Microsoft account.
- Alternatively, click Use another account to select another account.



- Based on the selected Microsoft account, the Default country and Default building are automatically populated.

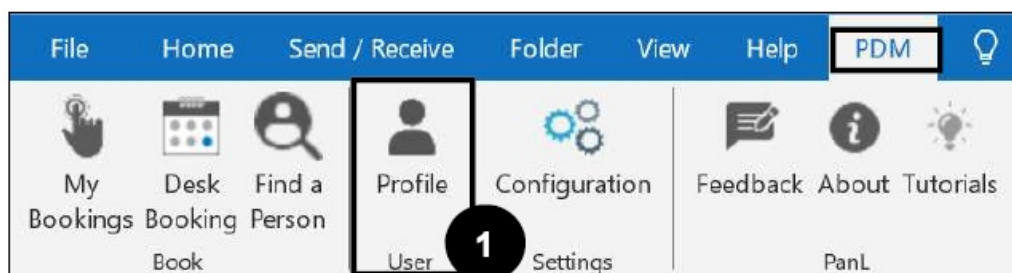


- Upon adding/updating the settings, click on [Save]. A message is displayed to indicate if the settings were updated successfully or not.

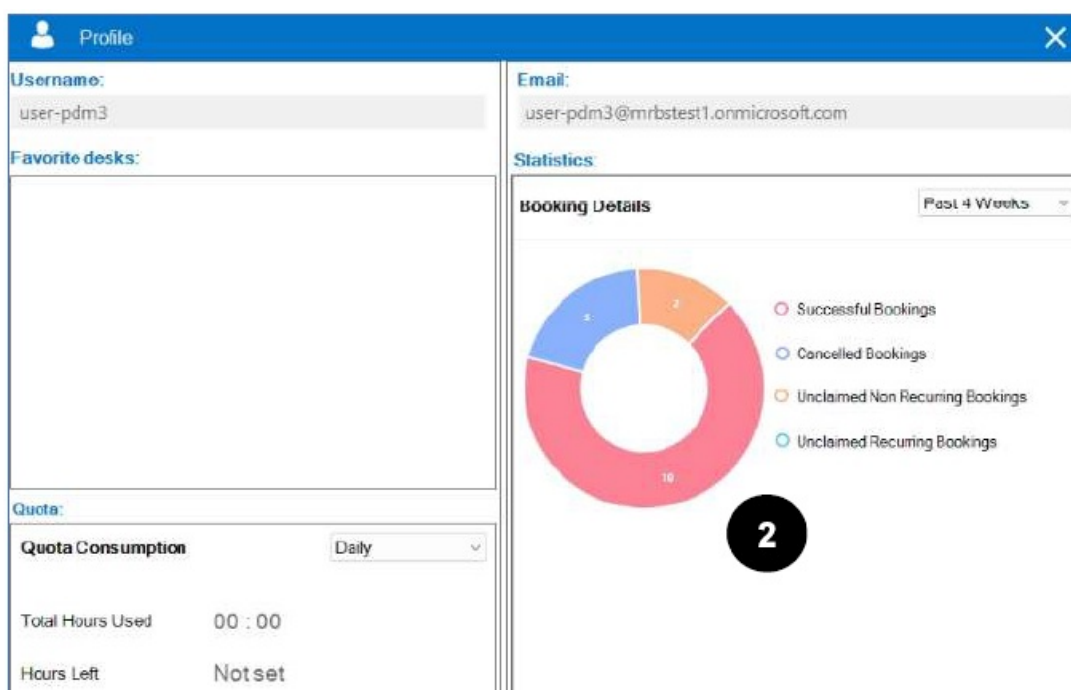
Profile

The Profile interface displays the user profile and booking statistics pertaining to the user. To access the User Profile

1. From the top bar menu, click PDM > Profile.



2. The User Profile interface is displayed. This interface provides the details of the logged in user -Username, Favorite Desks Email Address and Booking Statistics (such as Successful Bookings Past 7 Days/ Past 4 Weeks / Past 12 Weeks / Past 6 Months and a pictorial representation of the statistical data).

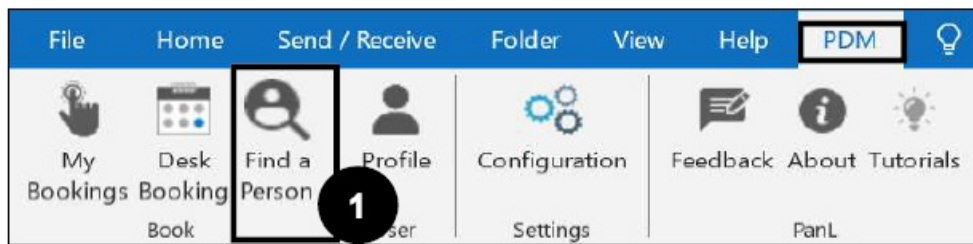


Find a Person

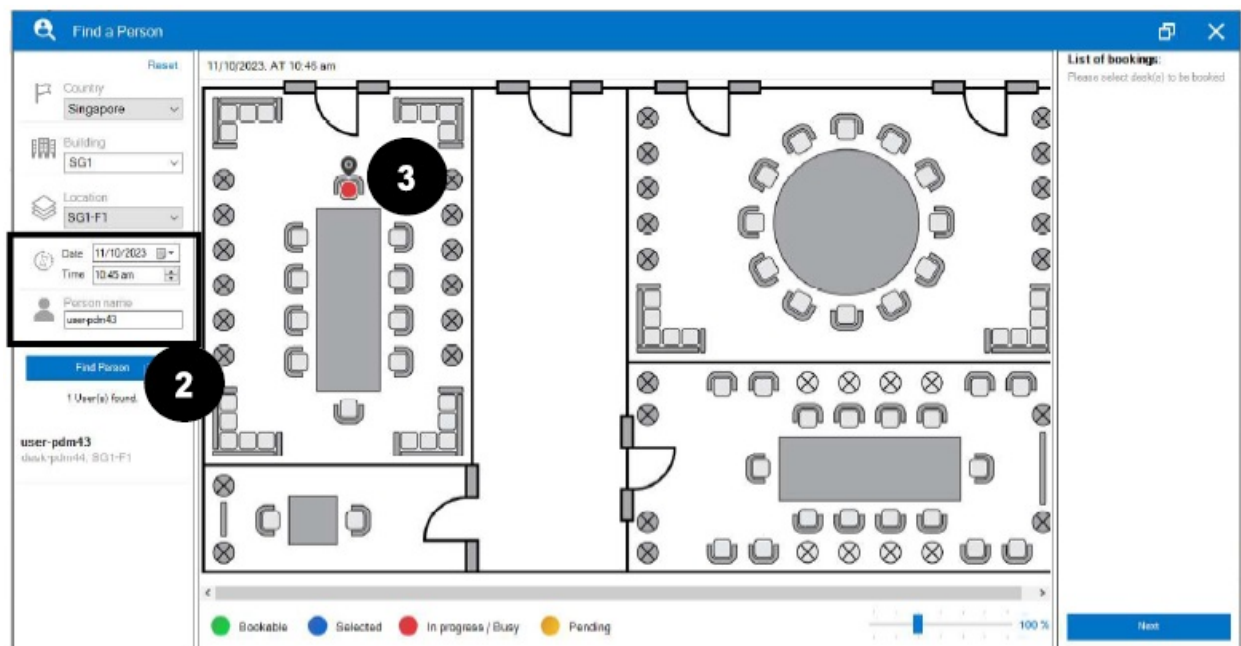
This interface is used to find a person and book available desks near to that person.

To find a person

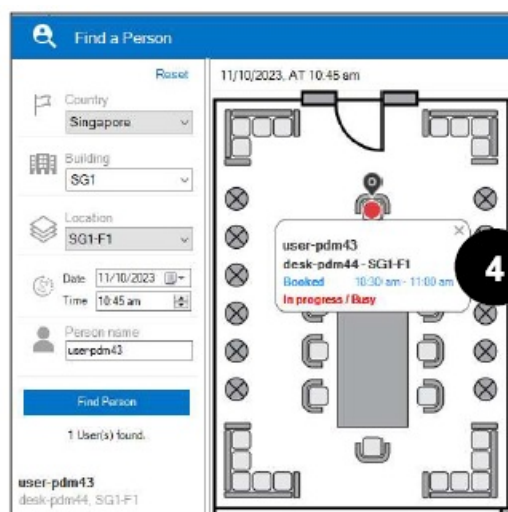
1. From the top bar menu, click PDM > Find a Person.



2. Find a Person interface is displayed. Input the following fields Date, Time, and Person Name. Click [Find Person]. If the search is successful, an appropriate message is displayed.



3. The person's location along with the nearby bookable desks (if any) are displayed.
4. Tap on the location icon to view the details (i.e., person name, desk name, location info, desk booking status, and booking time).



Desk Booking

The Desk Booking interface is used for booking desk(s). Users can book desk(s) either in Maps View or List View. By default, the desk booking interface is opened in Maps View. Users may switch between Maps View and List

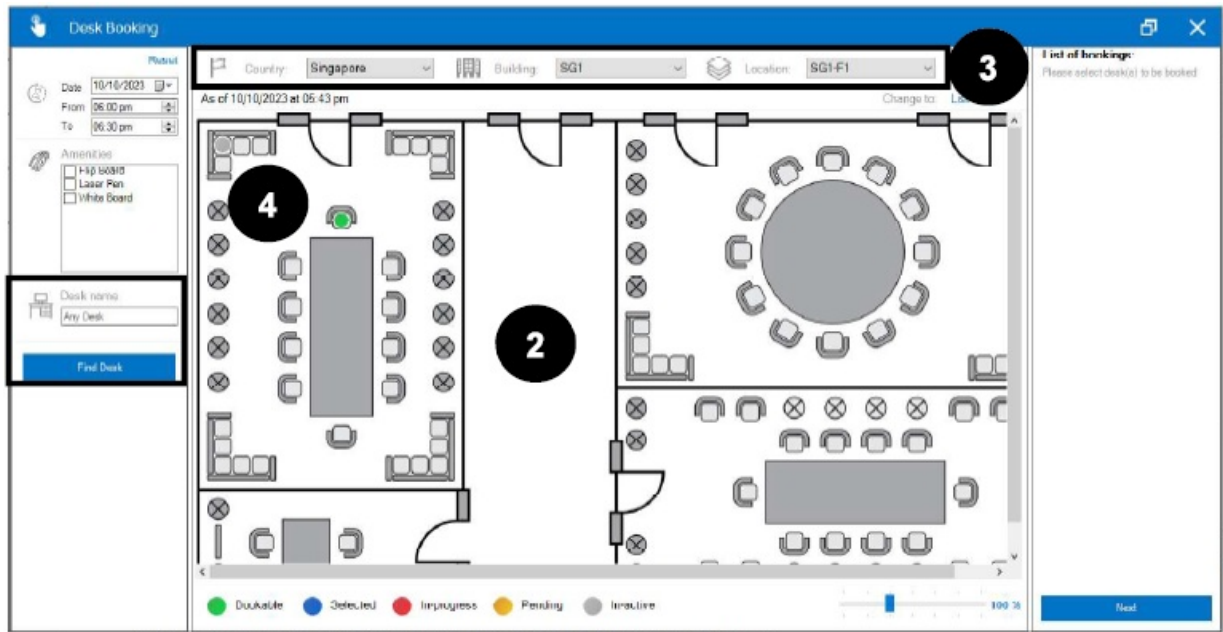
View depending on their requirements.

To access the desk booking interface

1. From the top bar menu, click PDM > Desk Booking.



2. The desk booking interface is opened in Maps View.



3. The pre-configured Country, Building, and Location are displayed on the top panel.
4. The location map is displayed with bookable desk(s) indicated in GREEN. Refer to Table 1 – Desk Status for the various Desk statuses.






Desk Status	Indicated By	Color
Bookable Desk		Green
Selected Desk		Blue
Booking In-Progress		Red
Booking Pending for Claim		Orange
Inactive Desk		Grey

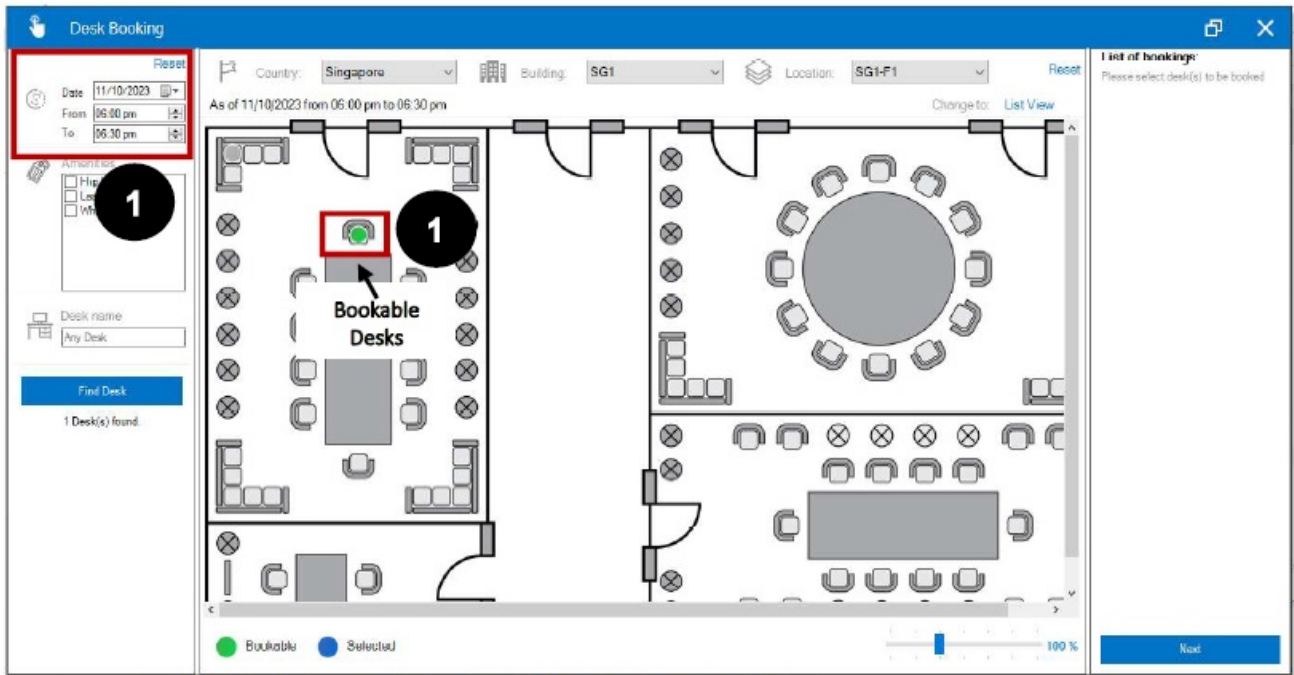
Table 1 - Desk Status

Booking Desk using Maps View

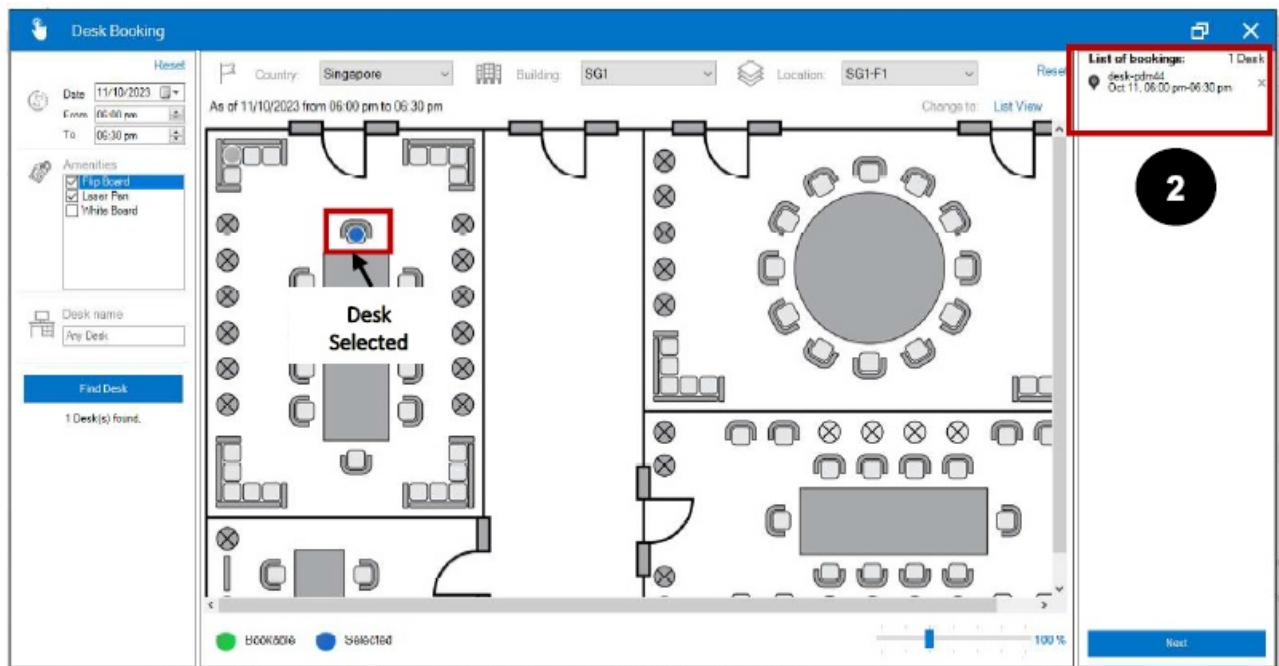
To book a desk using Maps View

1. Set the date, start time, and end time of the booking in the Date, From, and To fields respectively. Select amenities if needed. If you wish to find a specific desk, you may also enter the Desk Name. Click [Find Desk]. Available desks with the selected amenities and/or matching desk name will be displayed. Select one more

bookable desk(s) (indicated in GREEN).



2. The selected desk(s) are indicated in BLUE. The selected desk and the booking date and time are displayed under List of bookings. Click [Next].



3. The following booking-related attributes are displayed. Change the attributes as required

List of desks 1 Desk

Desk	Time	Reminder	Recurrence	Assignee
desk-pdm44 - SG1-F1 SG1, Singapore	Oct 11 06:00 pm - 06:30 pm	0 Minute(s)	None	None

3

Calendar: Oct 08 - 14, 2023

00, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12

SG1-F1

Add more Book

- Time Set the desk booking start time and end time by clicking on the Set Time. To change the start time/end time, drag the edge of the time slot on the calendar window as shown above. The date of the booking can also be changed by clicking the time slot and dragging it to another day on the calendar window. A greyed-out slot will indicate that the desk is already booked at that time slot.
- Reminder Outlook notification reminder before the booking starts. By default, it will follow the reminder time settings under PDM Console > Configure > Policy.

Desk	Time	Reminder	Recurrence	Assignee	
desk-pdm44 - SG1-F1 SG1, Singapore	Oct 11 06:00 pm - 06:30 pm	0 Minute(s)	None	None	x

3

Reminder

0 Minute(s)

None

0 Minute(s)

5 Minute(s)

10 Minute(s)

15 Minute(s)

20 Minute(s)

30 Minute(s)

45 Minute(s)

60 Minute(s)

3

- Recurrence Set the booking recurrence pattern (None/Daily/ Weekly/Monthly/Yearly). Refer to Error! Reference source not found. for more details about the recurrence patterns. Upon selecting the preferred recurrent pattern, click [Save].

The screenshot shows a 'Recurrence' dialog box with a blue header bar containing a calendar icon, the title 'Recurrence', a large black circle with the number '3', and a close button. The main area is titled 'Recurrence pattern' and contains a list of radio buttons: 'None' (selected), 'Daily', 'Weekly', 'Monthly', and 'Yearly'. Below this is a 'Start' date field set to 'Wednesday, 11 October 2023'. Underneath is a section for ending the recurrence with three options: 'End on' (radio button), 'End after' (radio button, selected), and a text input field with '0' and the label 'occurrence(s)'. At the bottom are 'Cancel' and 'Save' buttons.

Frequency	Variant	Description
None	–	The meeting will be booked on the specified date.
Daily	–	The meeting will be booked every X day, starting from the start date.
Weekly	–	Meetings will be booked every X week, on the selected days of the week. At least 1 day must be selected.
Monthly	Day X of every Y month(s)	Meetings will be booked on the specified day every Y month. Occurrences where the date is invalid (e.g. 31 February) will be skipped.
	Nth day of the week of every X month(s)	Meetings will be booked for the nth occurrence of the specified day of the week every X month Only 1 day of the week can be selected.
Yearly	On a specific day of the month every X year(s)	Meetings will be booked on the specified day every X year. Occurrences where the date is invalid (e.g. 29 February 2001) will be skipped.
	Nth day of the week of a specific month every X year(s)	Meetings will be booked for the nth occurrence of the specified day of the week and month every X year. Only 1 day of the week and month can be selected.

End options:

Option	Description
End on	Bookings will be made until the specific date. There must be at least 1 booking before or on the specified date.
End after X occurrences	A total of X bookings will be made.

Table 2 Recurrence Patterns

- Assignee If desk(s) is booked on behalf of another user, click on the Assignee field, and enter his/her Username/Email ID.

Desk	Time	Reminder	Recurrence	Assignee
desk-pdm44 - SG1-F1 SG1, Singapore	Oct 11 06:00 pm - 06:30 pm	0 Minute(s)	None	<div> <input type="text" value="user"/> <div> <div>3</div> <div> user-pdm1@mrb user-pdm43@mrb user-pdm56@mrb </div> </div> </div>

- Note To add a note to the booking, click on the booking slot in the calendar window and type as required.

Calendar view for Oct 08 - 14, 2023. The calendar shows a grid of days and times. The slot for Oct 11, 2023, from 06:00 pm to 06:30 pm is highlighted in orange. A note 'Marketing' is added to the slot. A circled '3' indicates the note field.

- Click [Add More] if you wish to add more desks or click **x** to remove a desk booking.

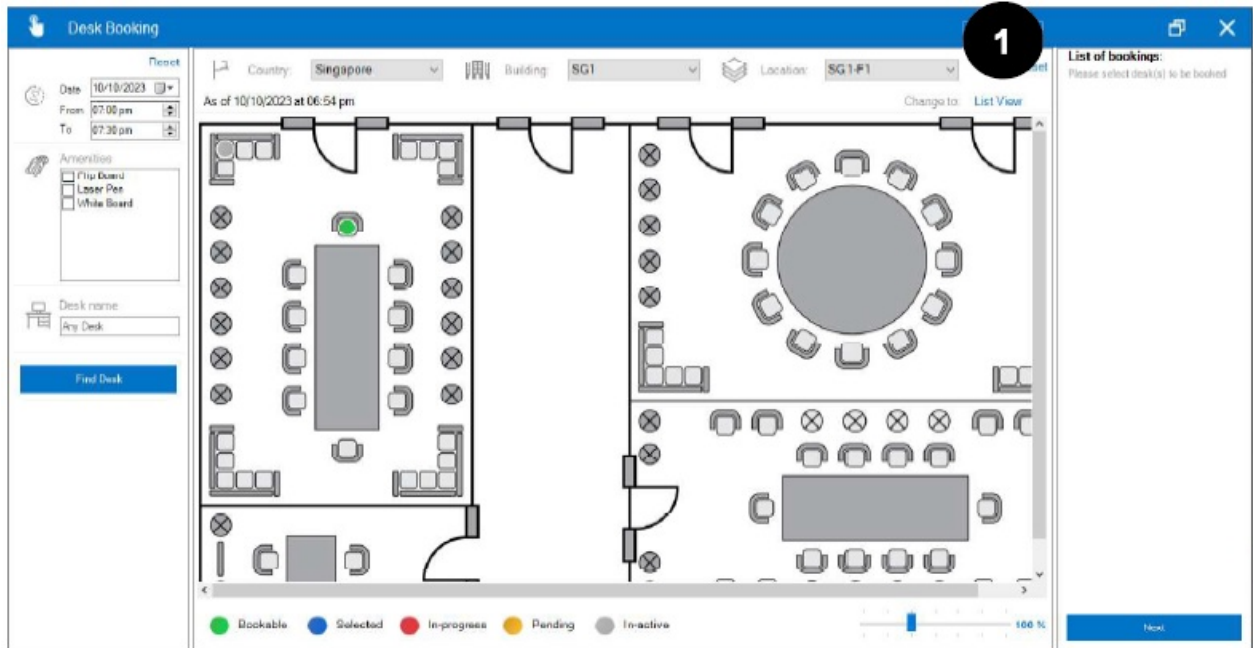
Desk	Time	Reminder	Recurrence	Assignee
desk-pdm44 - SG1-F1 SG1, Singapore	Oct 11 06:00 pm - 06:30 pm	0 Minute(s)	None	<div> <input type="text" value="est1.onmicrosoft.com"/> <div> <div>4</div> <div> <input type="button" value="x"/> </div> </div> </div>

- Upon adding/updating the booking related attributes, click [Book]. A message is displayed to indicate whether booking is successful or not. An email will be sent to the booking recipient(s) notifying that the desk booking(s) is complete.

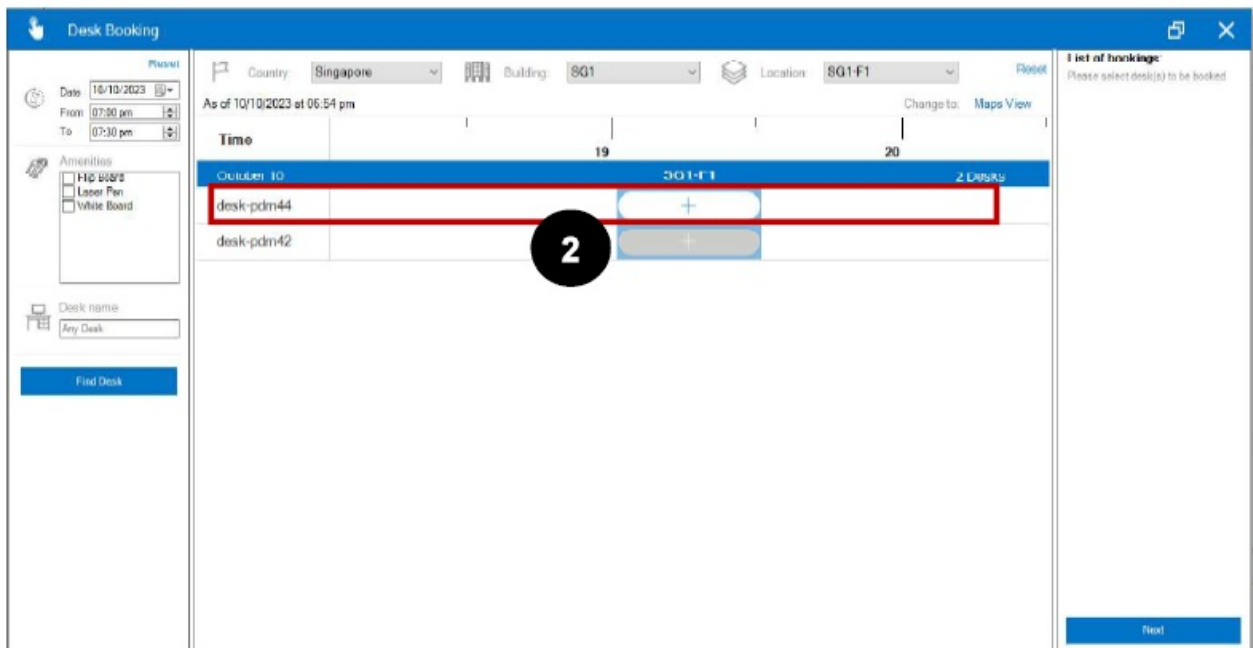
Booking Desk using List View

To book desk using List View

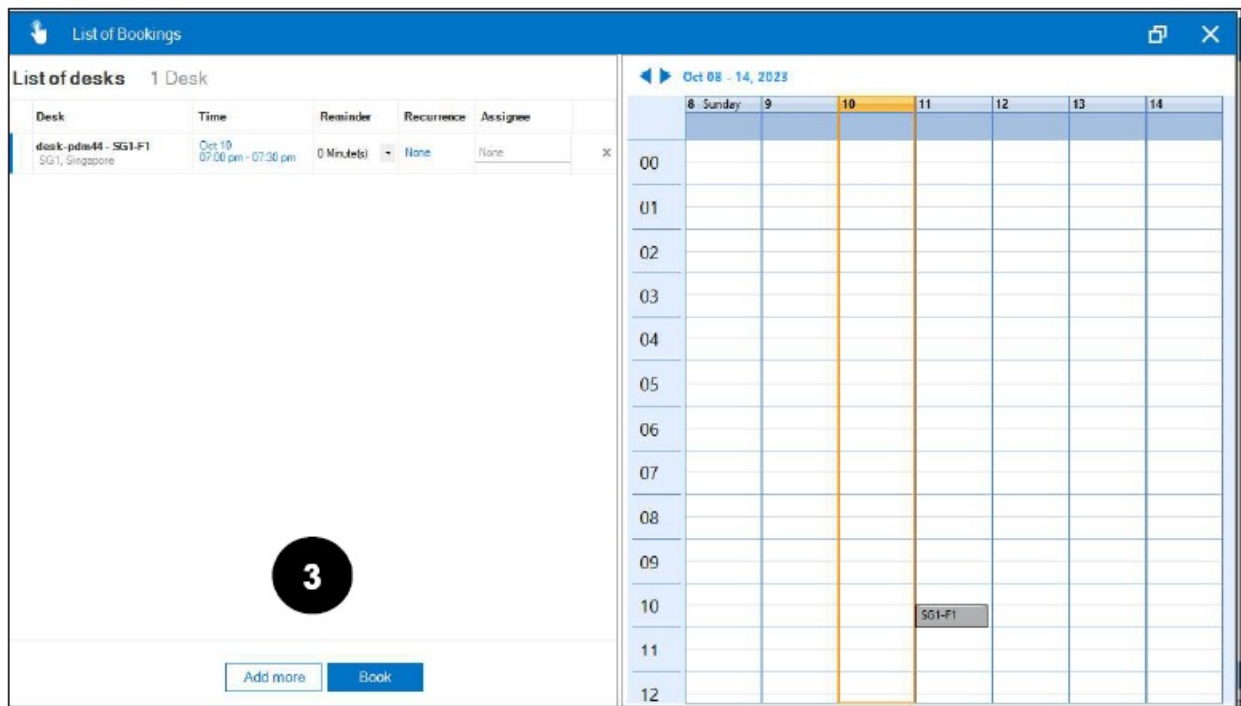
1. By default, the desk booking interface opens in Maps View. Change to List View by clicking the link.



2. A list of desks available in the selected location is displayed. Timeslots of inactive desks will be greyed out. Set the date, start time, and end time of the booking in the Date, From, and To fields respectively. Select amenities if needed and click [Find Desk]. The timeslot is adjusted accordingly and a list of available desks that have the specified amenities is displayed. Tap on + to add desk(s) for booking. The selected desk(s) along with the preferred date and time are displayed under List of Bookings.



3. The booking-related attributes are displayed. You may change the attributes, as required. Refer to the Booking Desk using Maps View for the details of setting booking attributes. Click on [Add More] if you wish to add more desks or click x to remove a booking. Upon adding/updating the booking-related attributes, click on [Book].



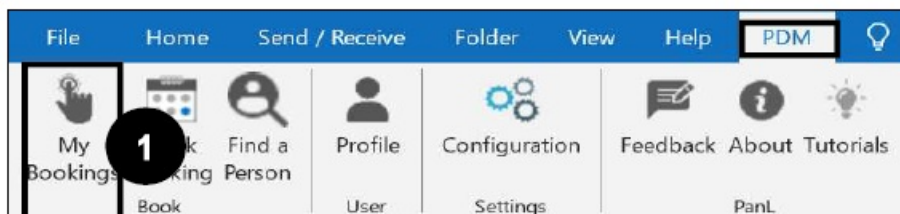
- A message is displayed to indicate whether a booking is successful or not. An email will be sent to the booking recipient(s) if the booking is successful.

Other Booking Functions

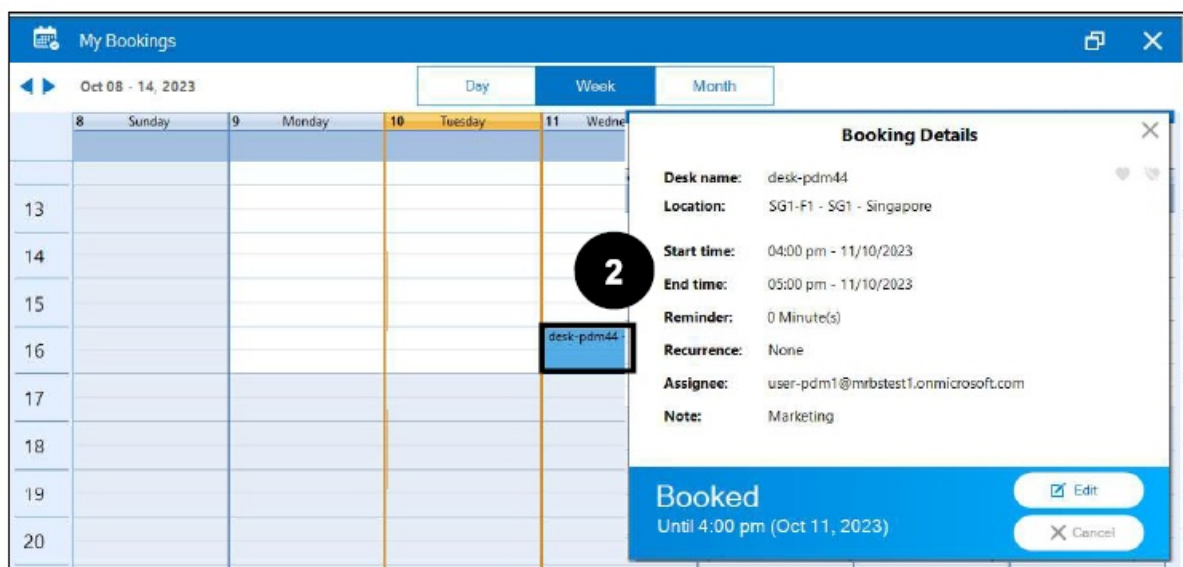
View and Edit Booking

To edit the booking details

1. From the top bar menu, click PDM > My Bookings.



2. The booking summary is displayed in the calendar window. You will be only able to edit the booking that are in status (time slot indicated in blue color). Double click on the booking.



3. The booking details are displayed. Click [Edit]. Edit the booking details as required and click [Save] to update

the changes, if any. A message is displayed to indicate whether the update was successful or not. An email will be sent to the booking recipient(s) notifying them of the changes.

Booking Details

3

Desk name:

desk-pdm44

Location:

SG1-F1 - SG1 - Singapore

Start time:

October 11, 2023

4:00 pm

End time:

October 11, 2023

5:00 pm

Reminder:

0 Minute(s)

Recurrence:

None

Assignee:

user-pdm1@mrbstest1.onmicrosoft.com

Note:

Marketing

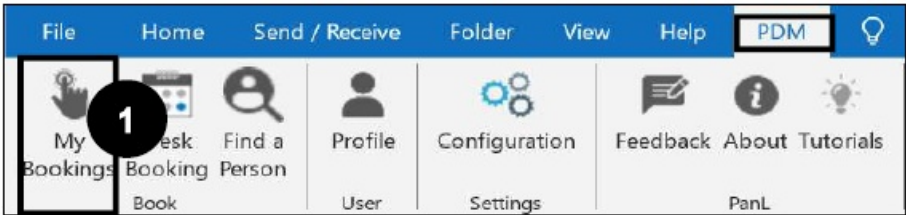
Cancel

Save

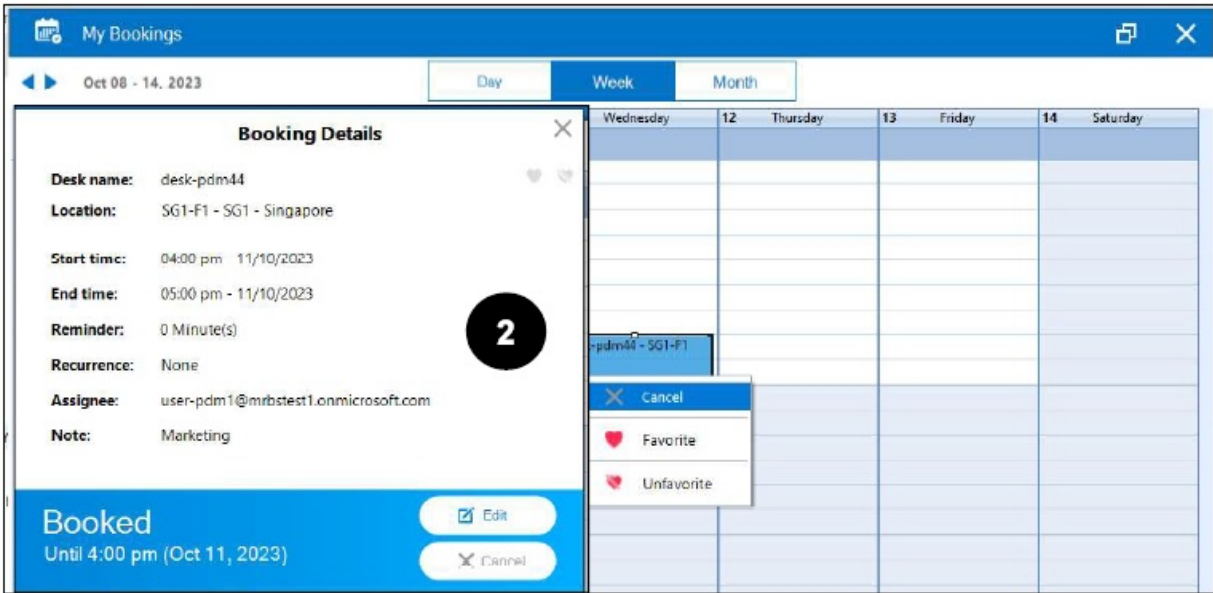
Cancel Booking

To cancel a booking

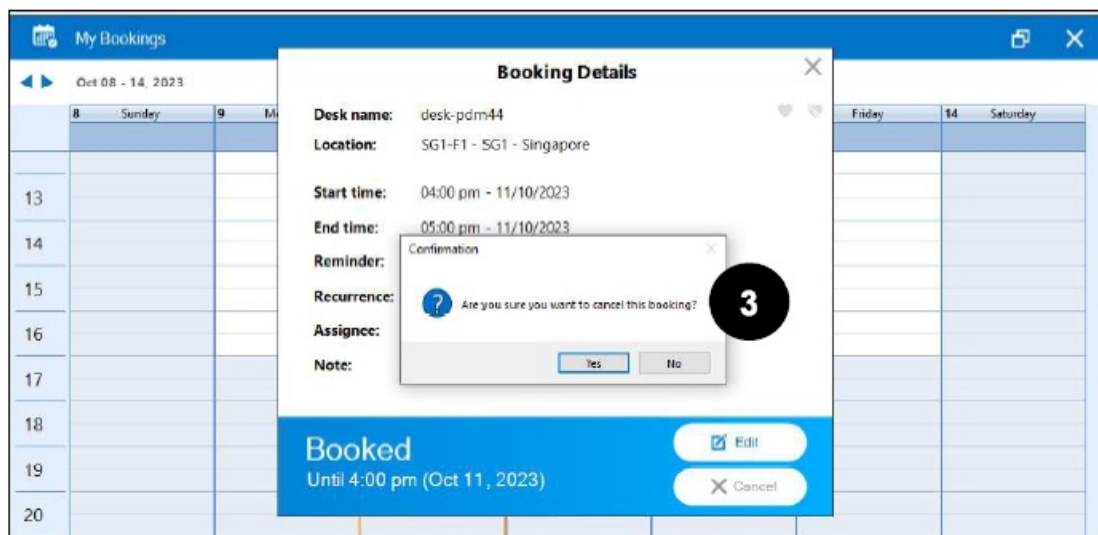
1. From the top bar menu, click PDM > My Bookings.



2. The booking summary is displayed in the calendar window. Right-click and select “cancel” or double-click on a booking. The booking details are displayed.



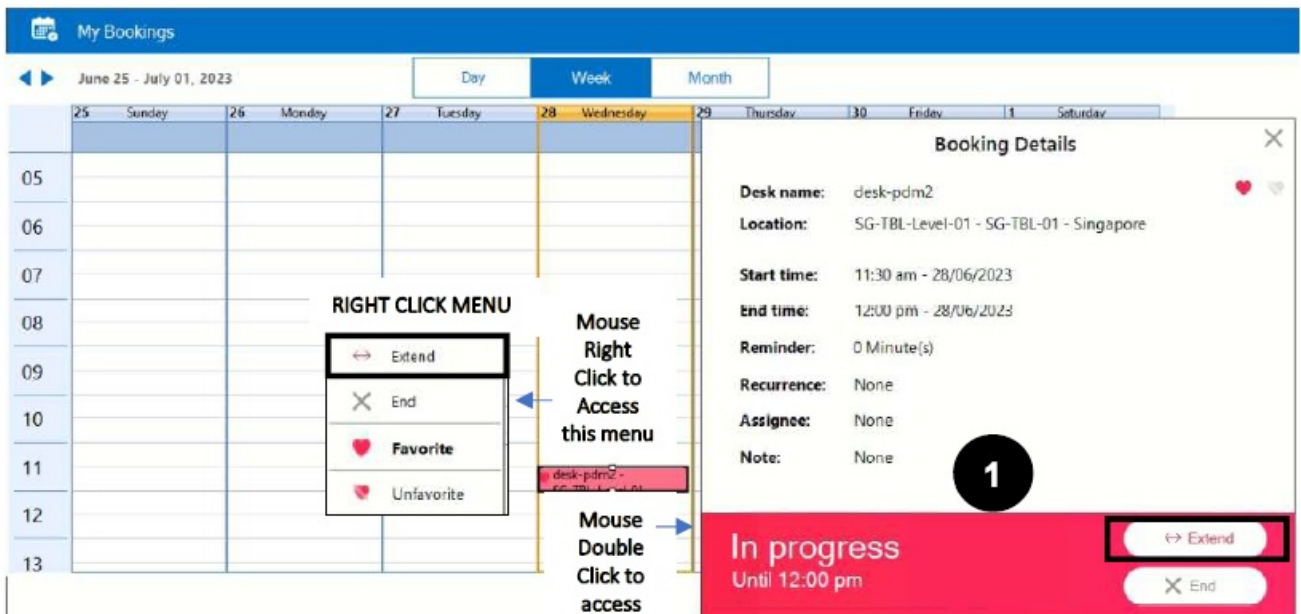
3. The booking details are displayed. Click [Cancel]. A confirmation message is displayed. Click [Yes] to cancel the booking or [No] to retain the booking. Upon selecting [Yes], a message is displayed to indicate whether the booking cancellation was successful or not. An email will be sent to the booking recipient(s) to notify them of the cancellation.



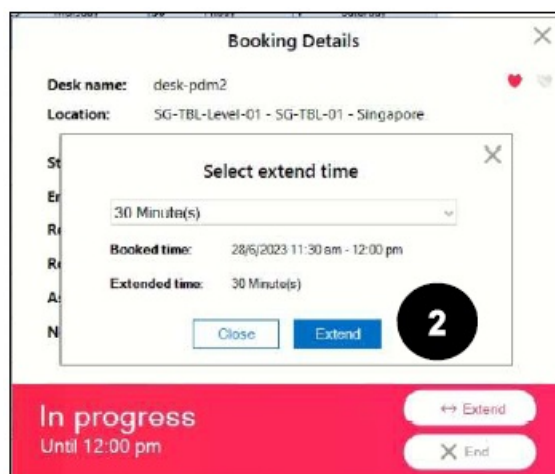
Extend Booking

To extend a booking

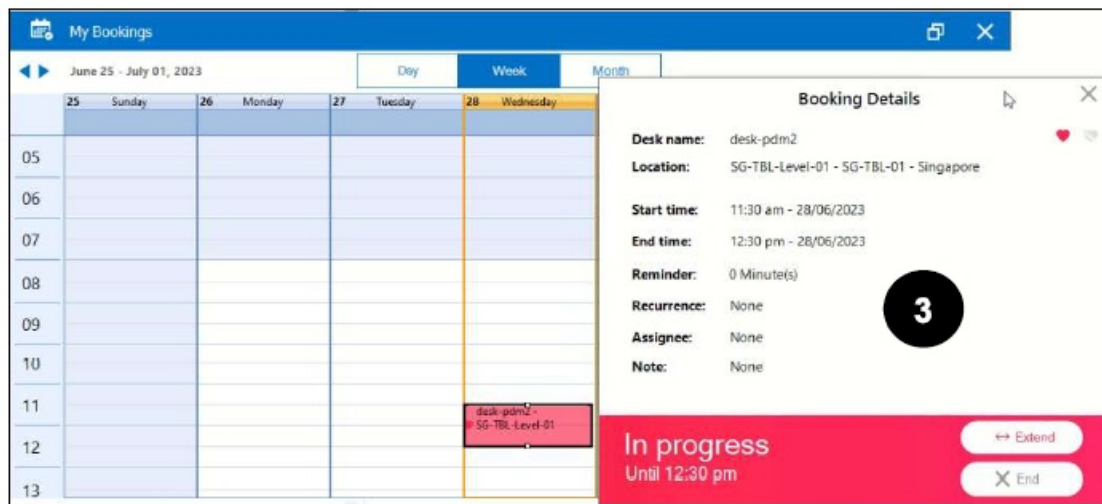
1. From the My Booking interface, right-click on the booking that is "In-Progress" (timeslot indicated in red color) and select "Extend" or double click on the booking that is "In-Progress" to view the booking details window.



2. Select the time to extend the booking. Click [Extend]. A message is displayed to indicate whether or not the booking was successfully extended." An email will be sent to the booking recipient(s) to notify them of the extension.



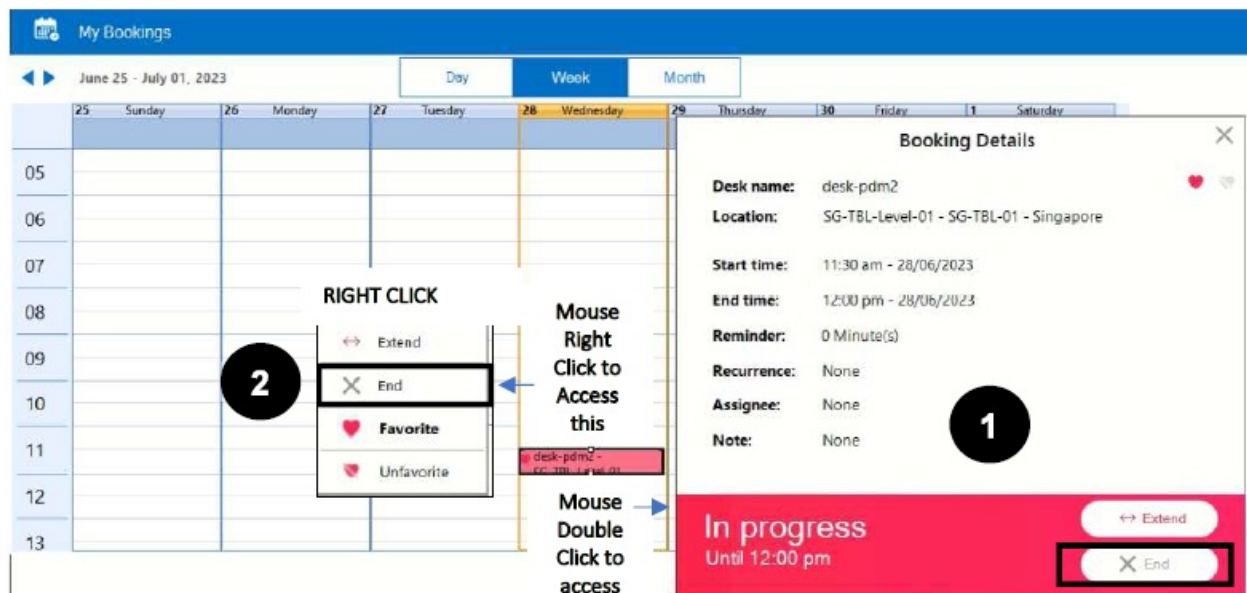
3. The booking timeslot is updated accordingly in the calendar window.



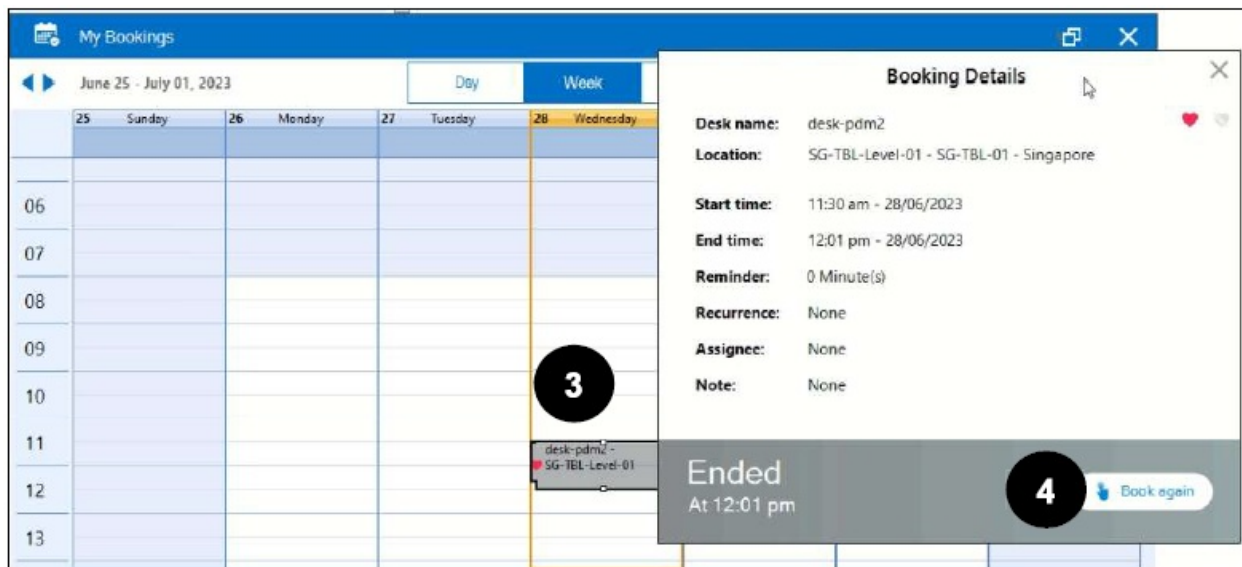
End Booking

To end a booking

1. From the My Booking interface, right-click on the booking that is "In-Progress" (timeslot indicated in red color) and select "End" or double-click on the booking that is "In-Progress" to view the book details window.



2. Click [End]. A confirmation message is displayed. Click [Yes] to end the booking or [No] to discard the operation. Upon selecting [Yes], a message is displayed to indicate whether the booking was ended successfully or not. An email will be sent to the booking recipient(s) to notify them that the booking has ended.
3. The booking timeslot is updated accordingly in the calendar window (timeslot indicated in grey color).



4. To do a re-booking, right-click on the booking summary and select “Book Again”. Go through the booking procedure as provided under the section Desk Booking.

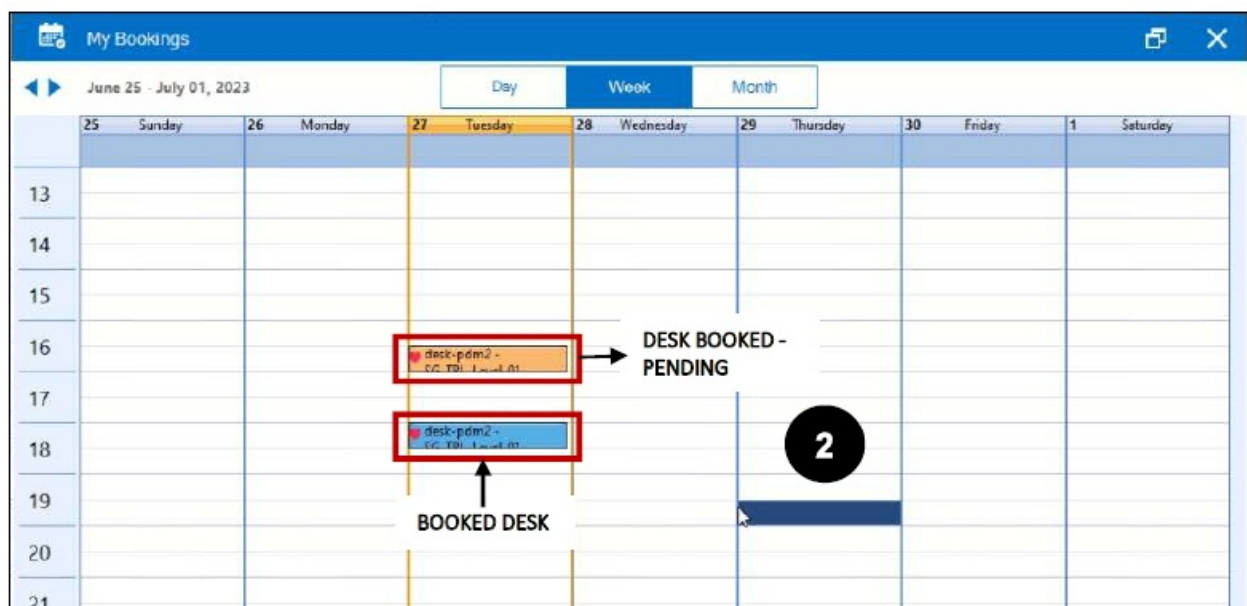
My Bookings

The My Bookings interface displays the list of desks booked by the user. To view the list of bookings,

1. From the top bar menu, click PDM > My Bookings.



2. The bookings, if any, are displayed in the calendar view. Double-click on the booking to view the details of the booking. Blue Booked, Orange – Pending Claim, Red – In Progress, Grey Ended.

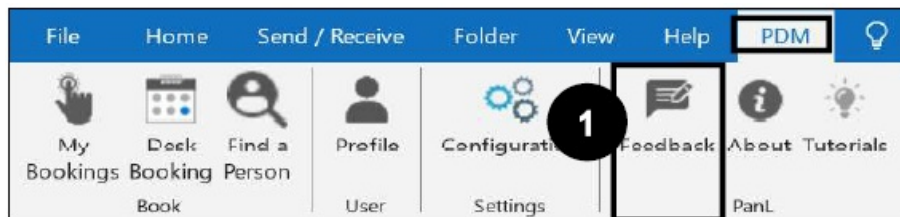


Feedback

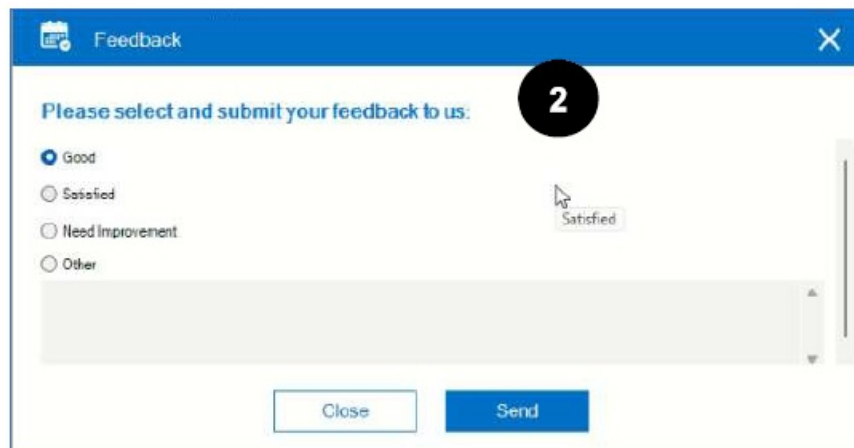
The Feedback interface allows users to send feedback about PanL Desk Manager (PDM) solution to the admin user.

To send feedback

1. From the top bar menu, click PDM > Feedback.



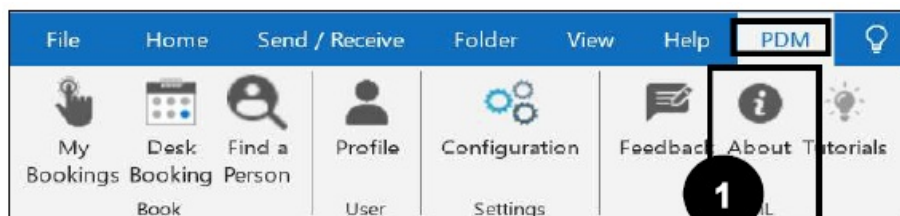
2. The Feedback interface is displayed with a set of pre-defined feedback options (preset in the PDM console under Feedback Management by the admin). Click and choose any of the options. If the option Other is chosen, the user may type in customized feedback. Upon providing the feedback, click [Send]. A message is displayed to indicate whether the message was sent successfully or not.



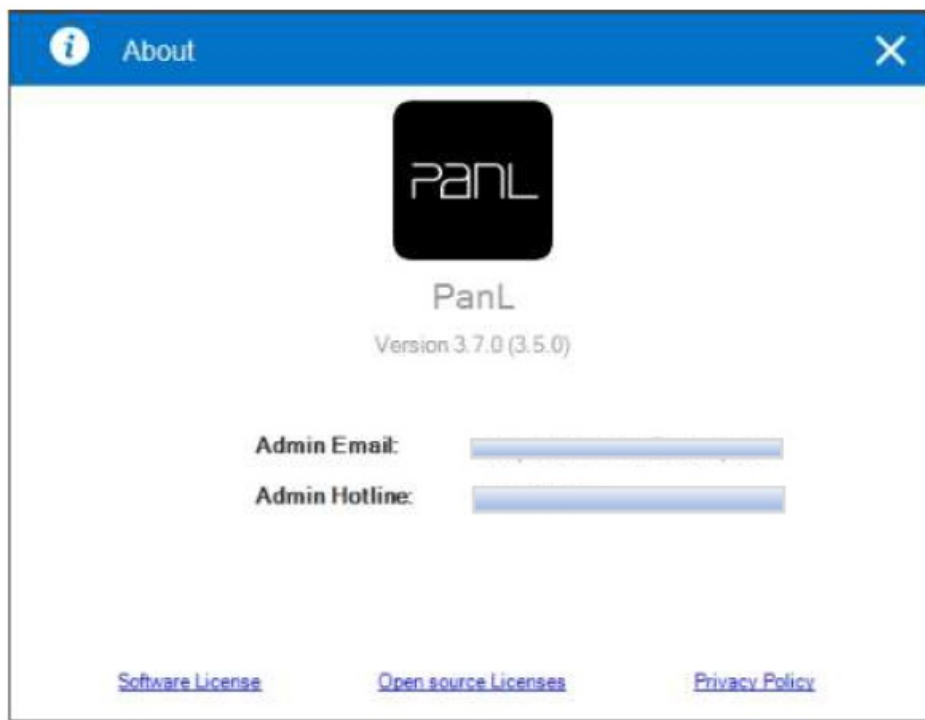
About

The About interface displays the Outlook Add-in version, product developer, and the organization admin contact details.

1. From the top bar menu, click PDM > About.



2. The About interface displays the PDM Outlook Add-in Version, as well as the organization admin contact details. It also displays the links for accessing the Software License, Open-Source Licenses and Privacy Policy information.



Refer to the section Policy Settings in BRTSYS_AN_046_PDM User Guide – 3. PDM Management Console and Desk Viewer at <https://brtsys.com/resources/> (Under PanL Desk Manager> Application Notes/Installation Guides/User Guides) for adding the product information.

Appendix

Glossary of Terms, Acronyms & Abbreviations

Term or Acronym	Definition or Meaning
IP	The Internet Protocol (IP) is the network layer communications protocol in the Internet protocol suite for relaying datagrams across network boundaries.
OIDC	OpenID Connect is an identity authentication protocol that is an extension of open authorization (OAuth) 2.0 to standardize the process for authenticating and authorizing users when they sign in to access digital services.
PDM	PanL Desk Manager is a desk booking system that addresses desk resource allocation problems by enabling organizations to automatically manage hotdesks.
URL	A Uniform Resource Locator, colloquially known as an address on the Web, is a reference to a resource that specifies its location on a computer network and a mechanism for retrieving it.


Revision History

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- **Document Reference No.:** BRTSYS_000119
- **Clearance No.:** BRTSYS#080
- **Product Page:** <https://brtsys.com/pdm/>
- **Document Feedback:** Send Feedback

Revision	Changes	Date
Version 1.0	Initial release for PanL Desk Manager (PDM) V2.6.0	28-07-2023
Version 2.0	Updated release for PanL Desk Manager (PDM) V3.1.0 Outlook Add In Version 3.7.0 (3.5.0)	20-05-2024

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Documents / Resources

	<p>BRTSys PDM Outlook Add In [pdf] User Guide Ver.3.7.0, 3.5.0, PDM Outlook Add In, PDM, Outlook Add In, Add In, In</p>
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References

- [🔗 Home - PanL Desk Manager](#)
- [User Manual](#)

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