**USER GUIDE**

# PANL
## Desk Manager 3.1.0

**Part 5 - Outlook Add-In**

(Ver.3.7.0-3.5.0)



Document Version: 2.0
Issue Date: 20-05-2024

# Table of Contents

# 1. About This Guide

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

# 2. Intended Audience

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

# 3. 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 PD35L Display | | |

# 4. Getting Started with Outlook Add-In

## 4.1 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**.
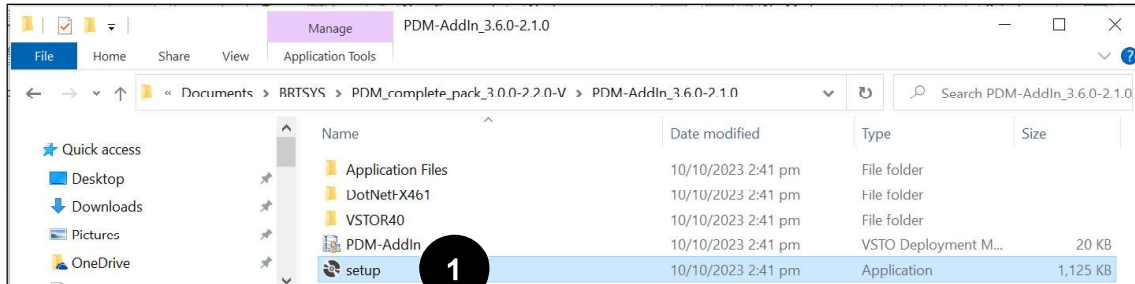


2. Once the installation pop up appears, click **[Install].**
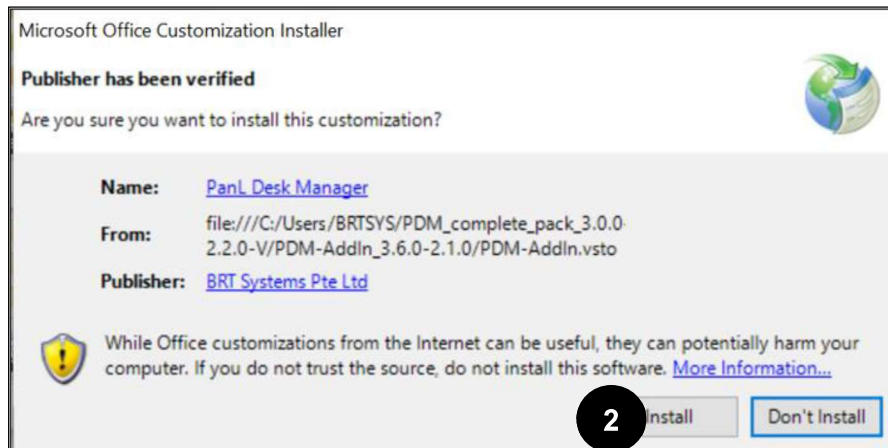


3. Upon successful installation, an appropriate message indicating the same is displayed.



4. Restart Microsoft Outlook for the add-in to take effect.

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".
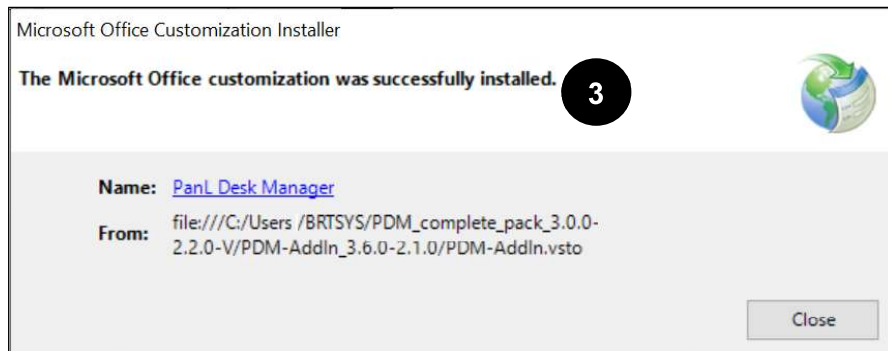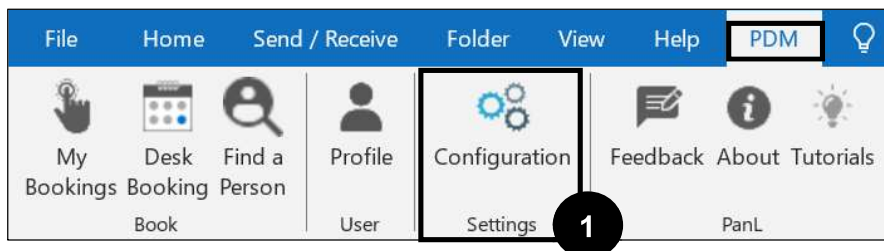
## 4.2 Configure Outlook Add-In

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 –

    o   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]**.
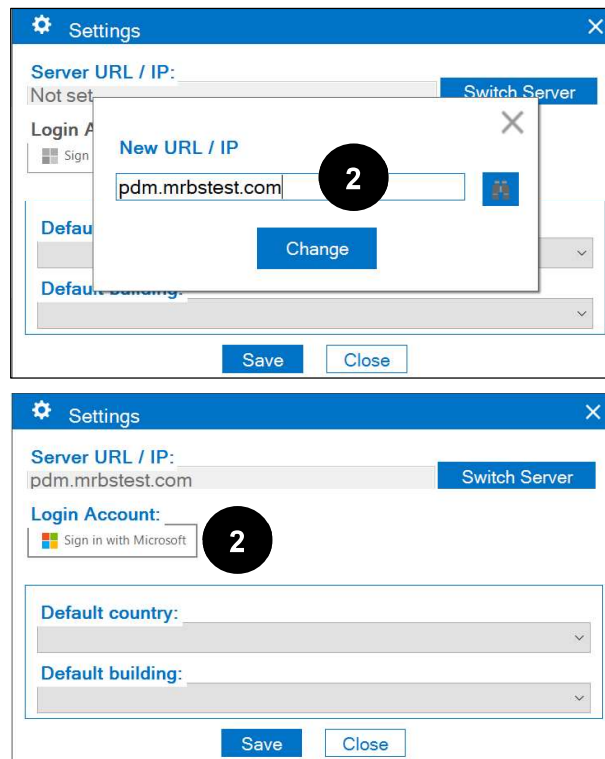
o  Click **[Sign in with Microsoft]** to login with the Microsoft account.

o  Alternatively, click "Use another account" to select another account.
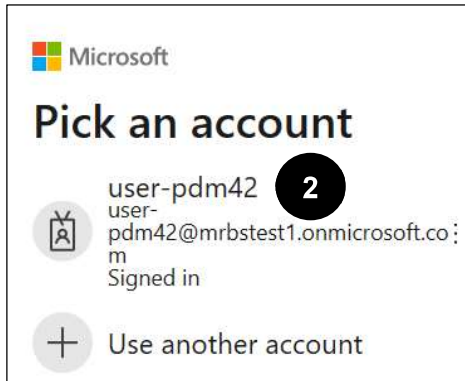


o  Based on the selected Microsoft account, the *Default country* and *Default building* are automatically populated.
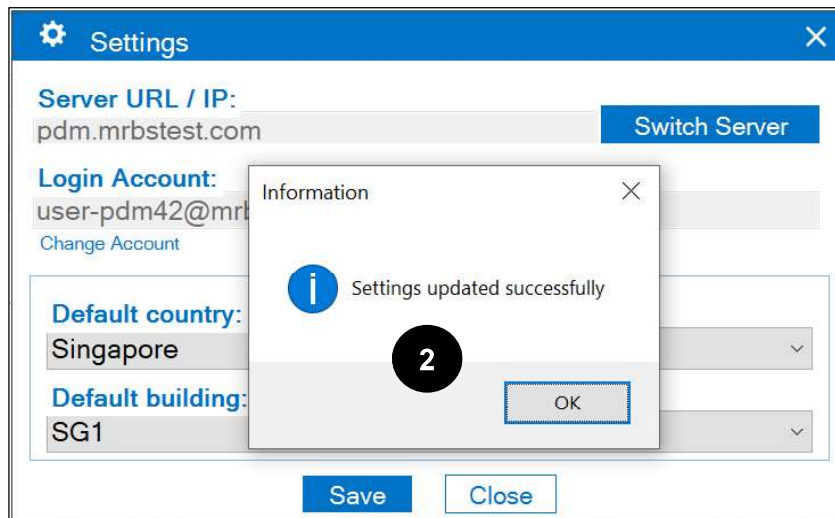


o  Upon adding/updating the settings, click on **[Save]**. A message is displayed to indicate if the settings were updated successfully or not.

## 4.3 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**.
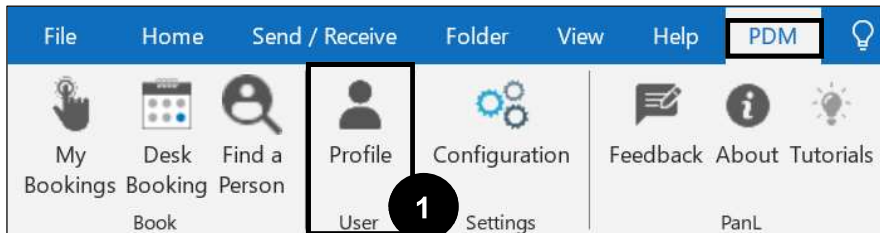


2. The User Profile interface is displayed. This interface provides the details of the logged in user - *Username, Favorite Desks*, if any, User's *Email Address* and *Booking Statistics* (such as Successful Bookings – Past 7 Days/ Past 4 Weeks / Past 12 Weeks / Past 6 Months and a pictorial representation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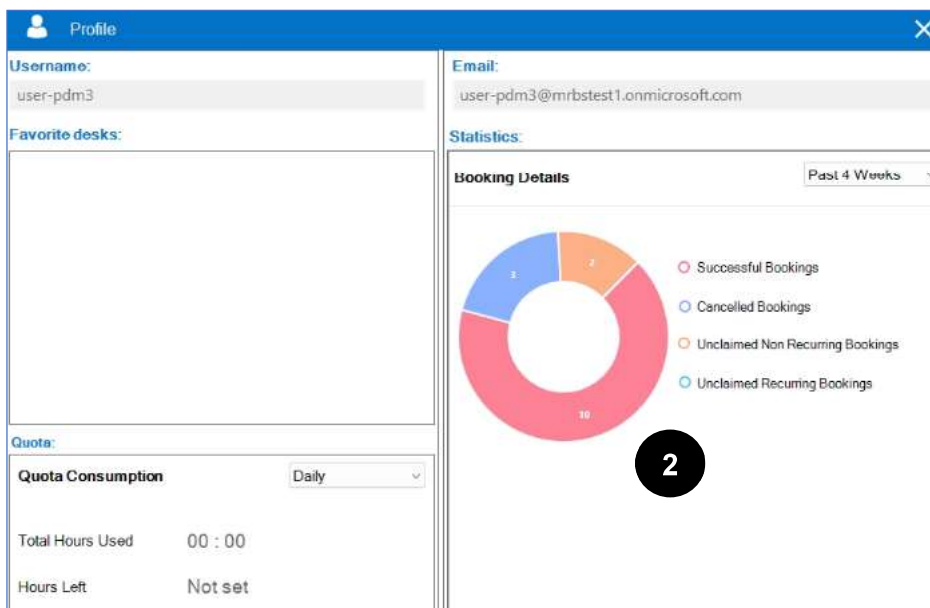
## 4.4 Find a Person

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**.
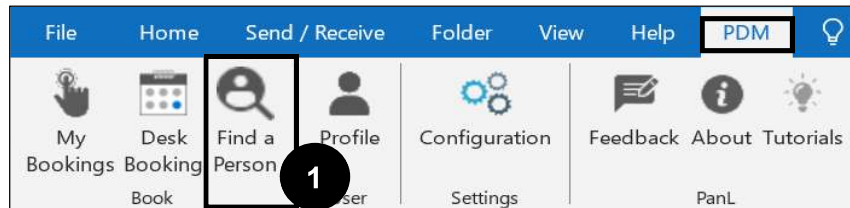


2. Find a Person interface is displayed. Input the following fields – *Date, Time,* and *Person Name*. Click **[Find Person]**. If the search is successful, an appropriate message is displayed.
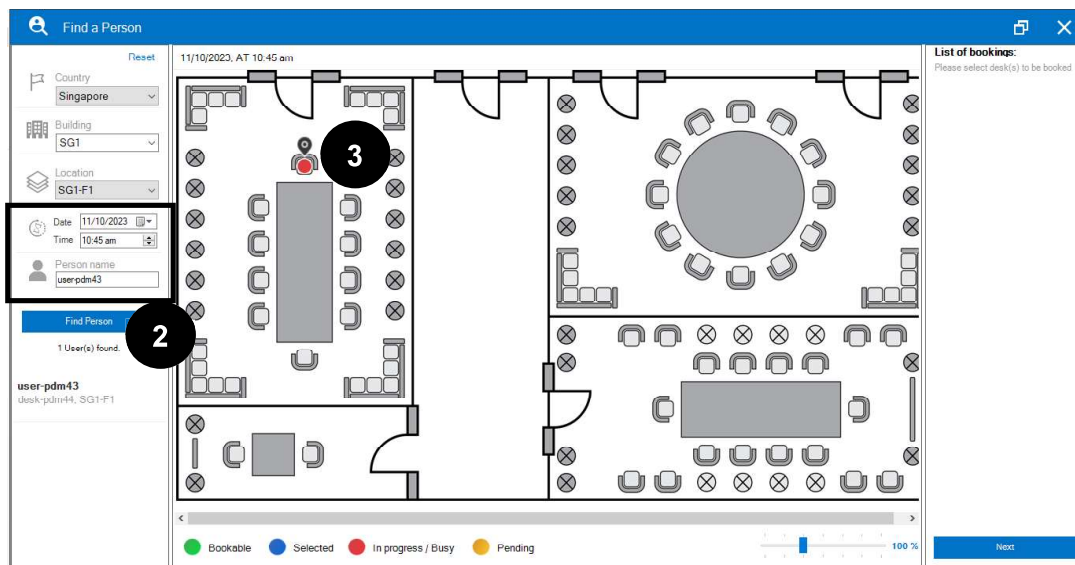


3. The person's location along with the nearby bookable desks (if any) are displayed.

4. Tap on the location 📍 icon to view the details *(i.e., person name, desk name, location info, desk booking status and booking time)*.
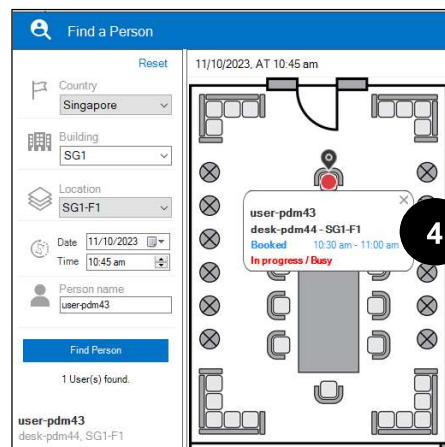
# 4.5 Desk Booking

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 requirement.

To access desk booking interface –

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



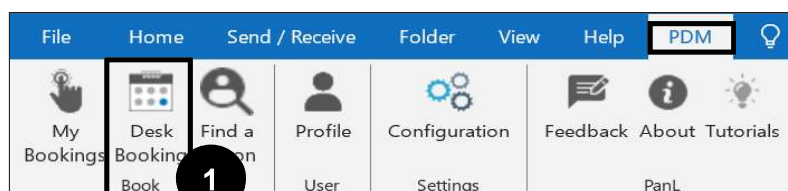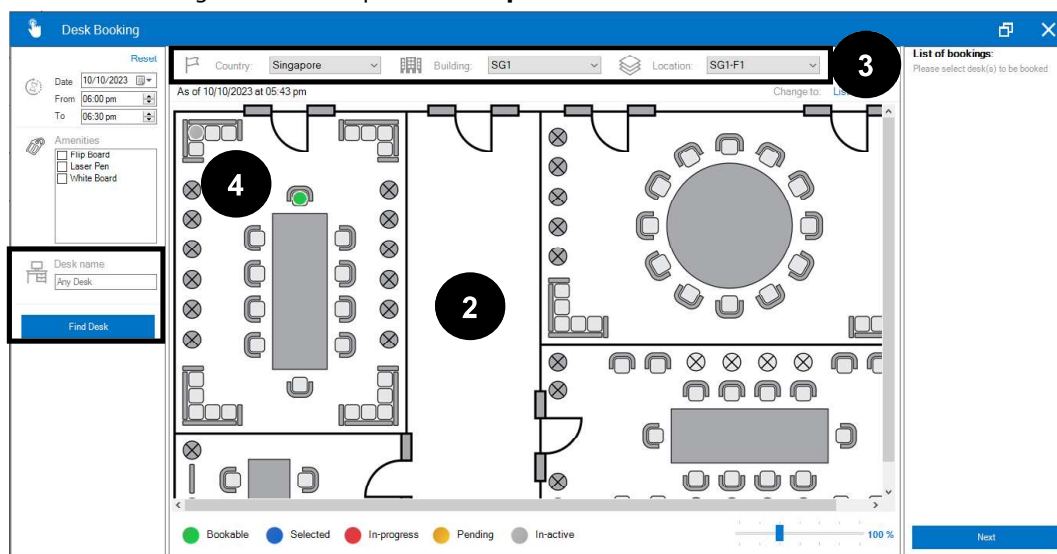2. The desk booking interface is opened in **Maps View**.



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**

## 4.5.1  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).
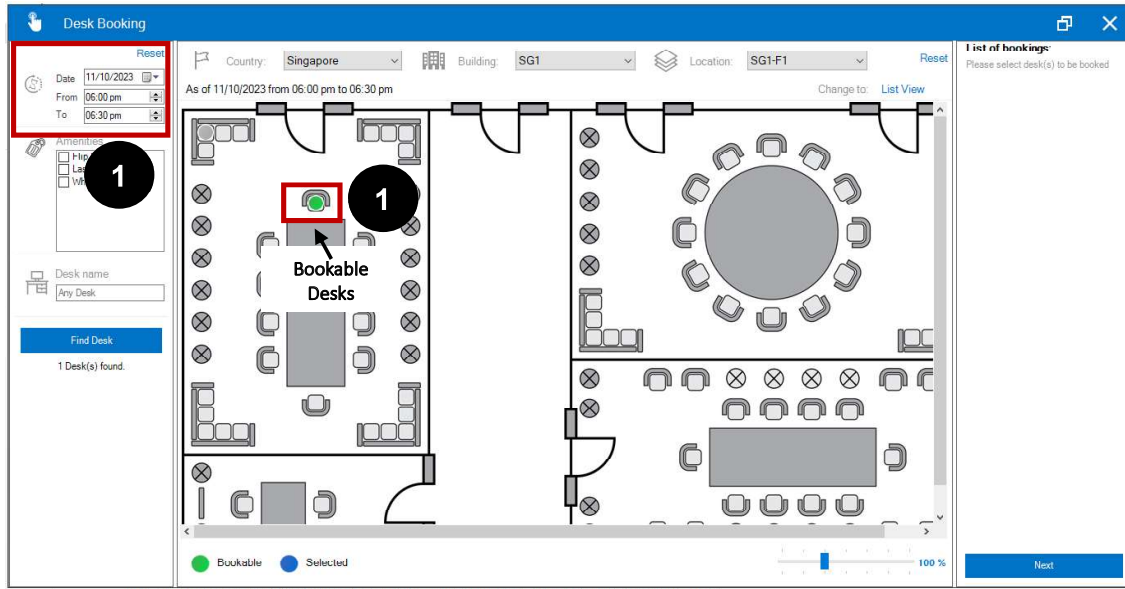


2. The selected desk(s) are indicated in BLUE. The selected desk and the booking date and time are displayed under *List of bookings*. Click **[Next]**.
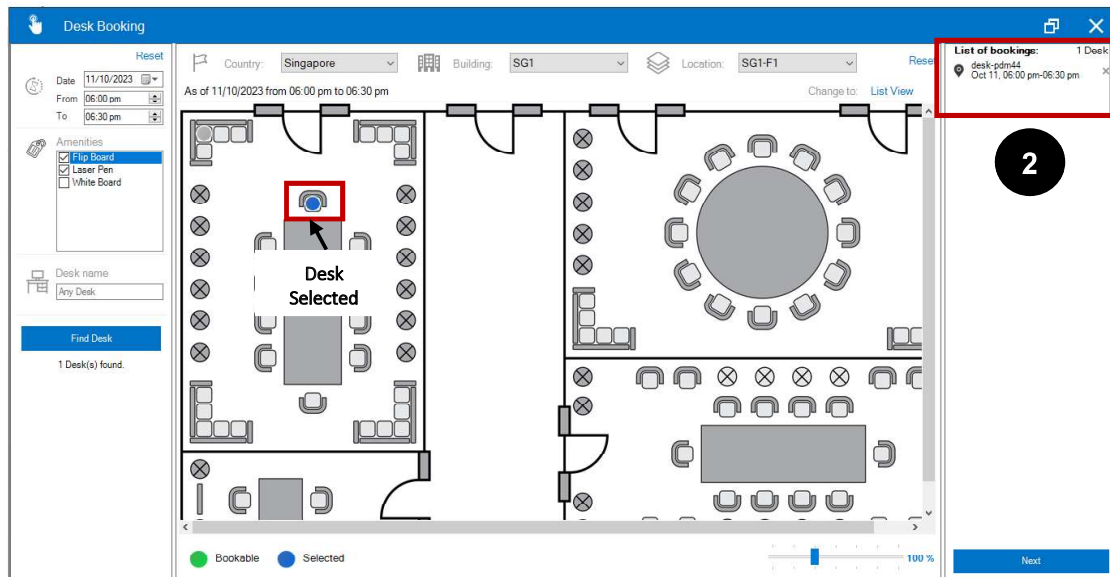
3. The following booking related attributes are displayed. Change the attributes as required –



- *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**.



- *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]**.

| Frequency | Variant | Description |
|---|---|---|
| None | - | Meeting will be booked on the specified date. |
| Daily | - | 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.<br>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<br>Only 1 day of the week can be selected. |
| Yearly | On 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.<br>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.

- *Note* – To add a note to the booking, click on the booking slot in the calendar window and type as required.
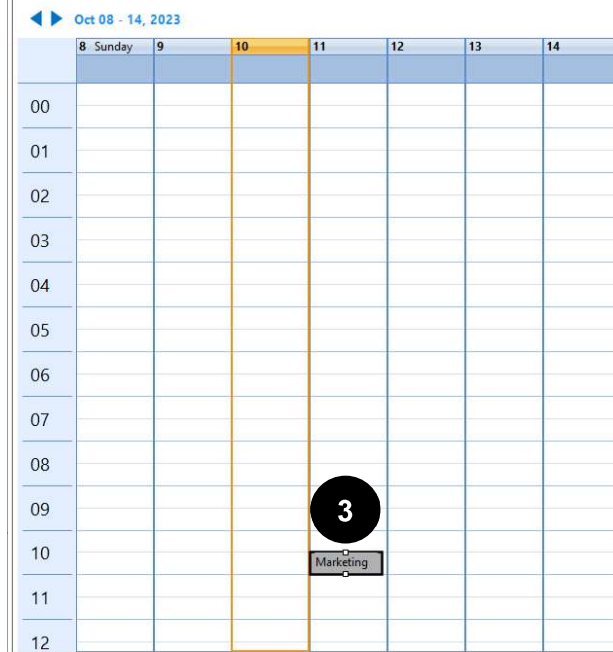
4. Click **[Add More]** if you wish to add more desks or click ✖ to remove a desk booking.

5. 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.

## 4.5.2  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.
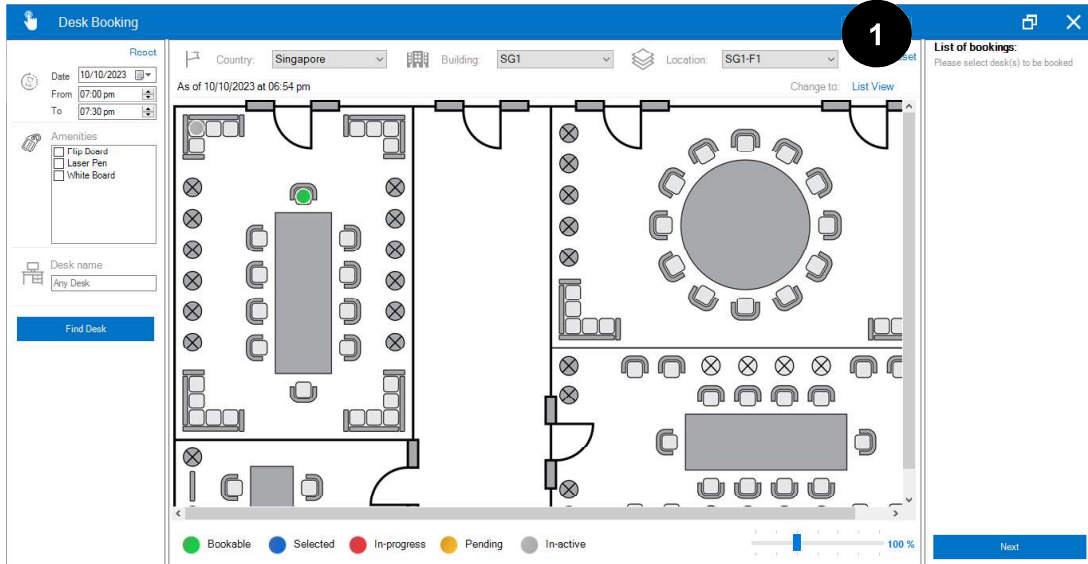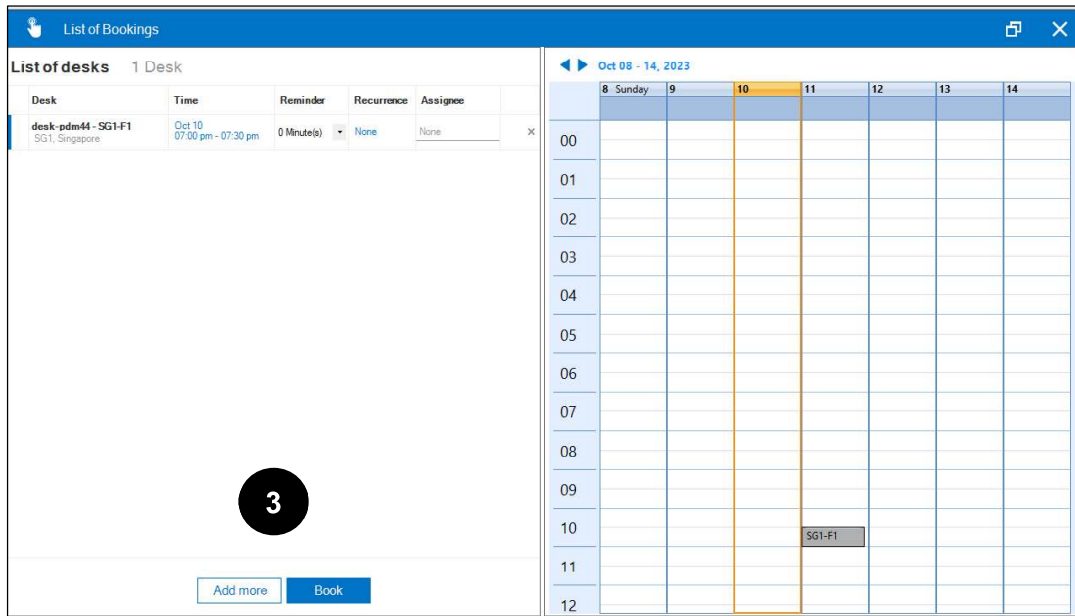


2. A list of desks available in the selected location is displayed. Timeslots of inactive desks will be greyed out. Set the date, start time, and end time of the booking in the *Date*, *From,* and *To* fields respectively. Select amenities if needed and click **[Find Desk]**. The timeslot is adjusted 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.*
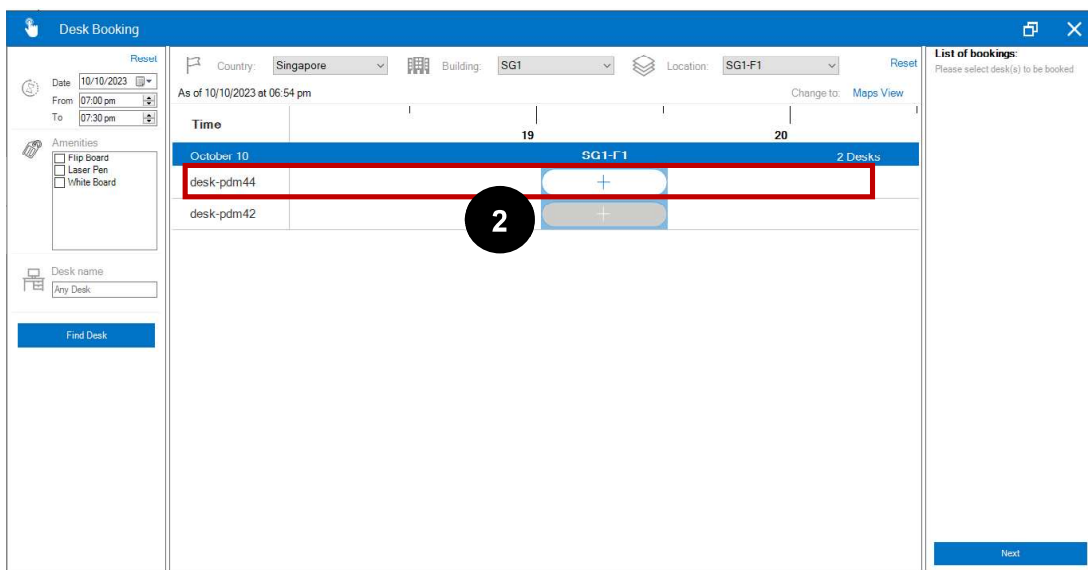
3. The booking related attributes are displayed. You may change the attributes, as required. Refer to **Booking Desk using Maps View** for the details pertaining to setting booking attributes. Click on **[Add More]** if you wish to add more desks or click ✕ to remove a booking. Upon adding/updating the booking related attributes, click on **[Book]**.
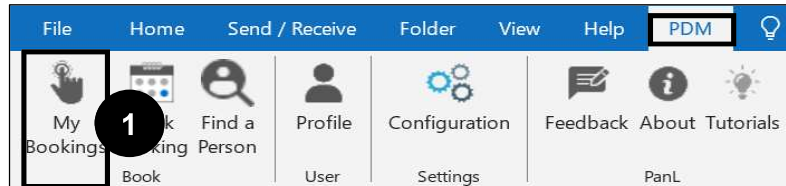


A message is displayed to indicate whether a booking is successful or not. An email will be sent to the booking recipient(s) if booking is successful.
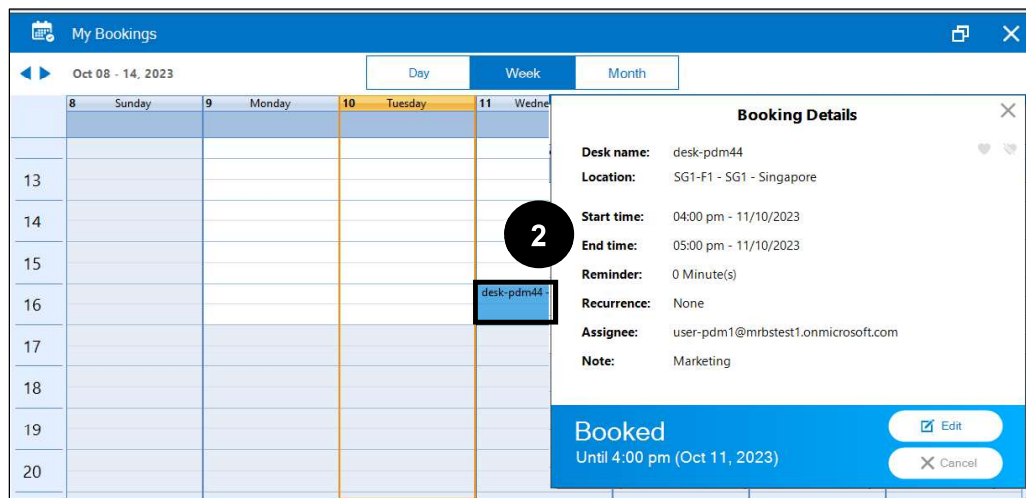
## 4.5.3  Other Booking Functions

### 4.5.3.1 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 *"Booked"* 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.

### 4.5.3.2 Cancel Booking

To cancel a booking –

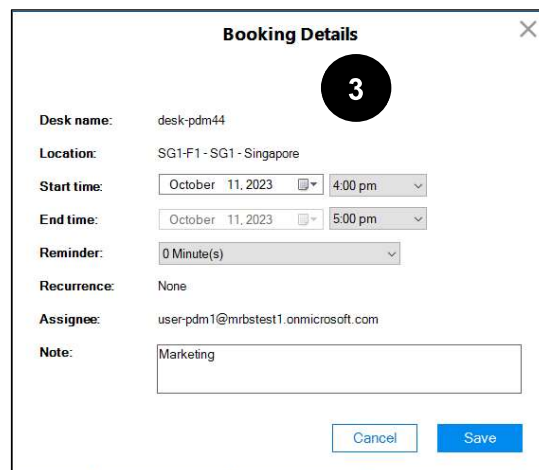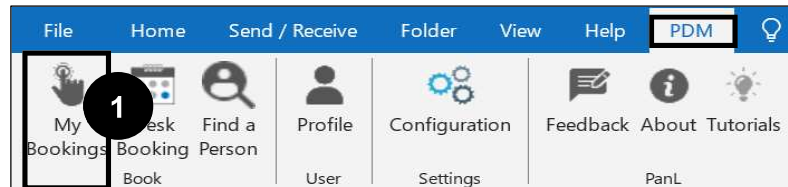1.  From the top bar menu, click **PDM > My Bookings**.



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.
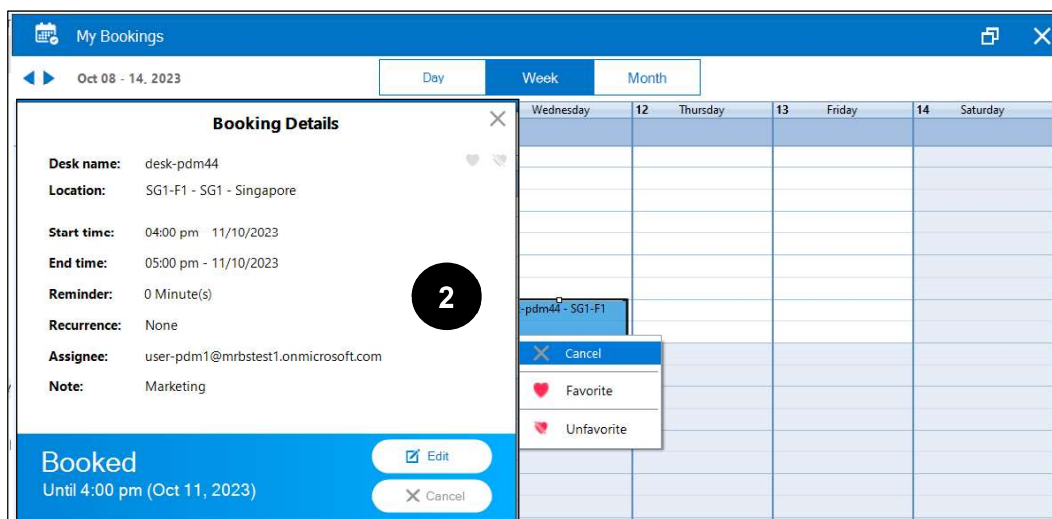


3.  The booking details are displayed. Click **[Cancel]**. A confirmation message is displayed. Click **[Yes]** to cancel the booking or **[No]** to retain the booking. Upon selecting **[Yes]**, a message is displayed to indicate whether  the booking cancellation was successful or not. An email will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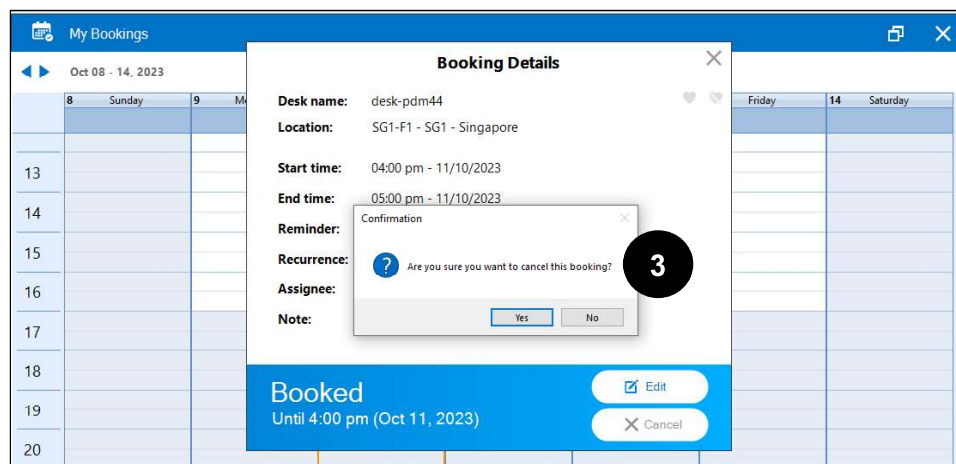
## 4.5.3.3 Extend Booking

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.
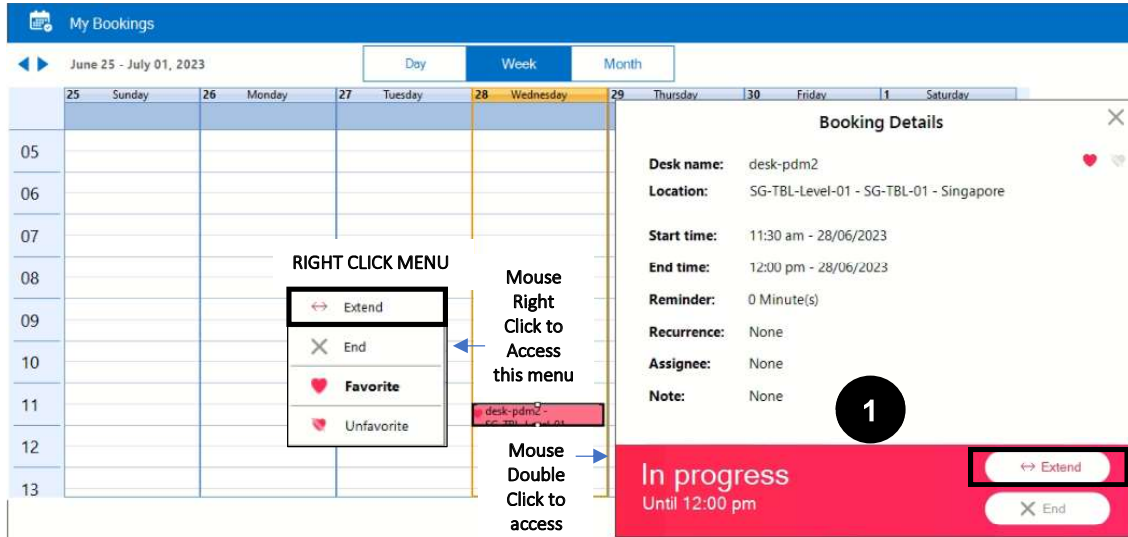


2. Select the time to extend the booking. Click **[Extend]**. A message is displayed to indicate whether or not the booking was successfully extended." An email will be sent to the booking recipient(s) to notify them of the extension.



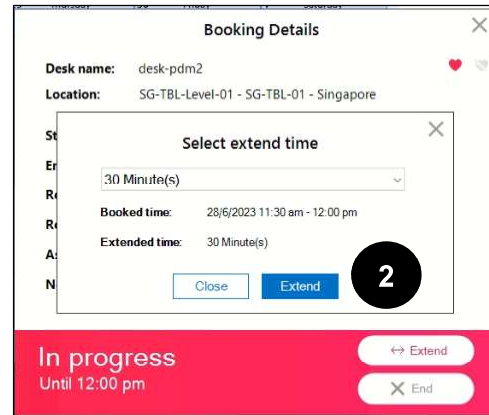3. The booking timeslot is updated accordingly in the calendar window.
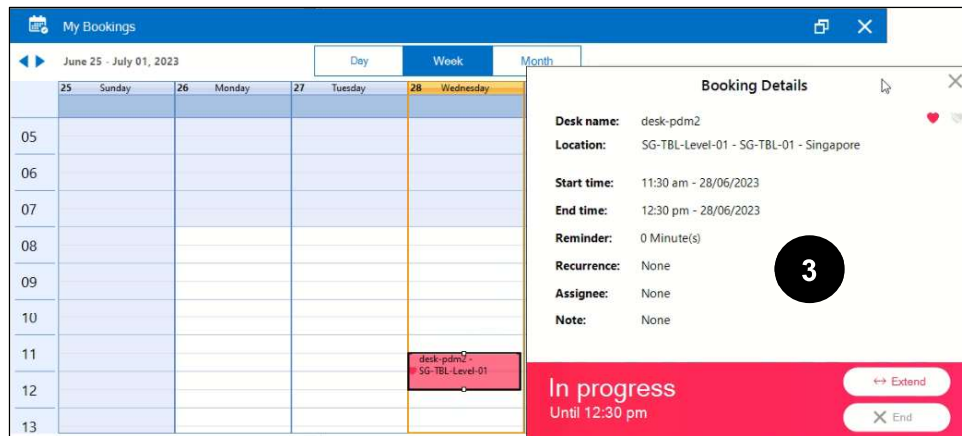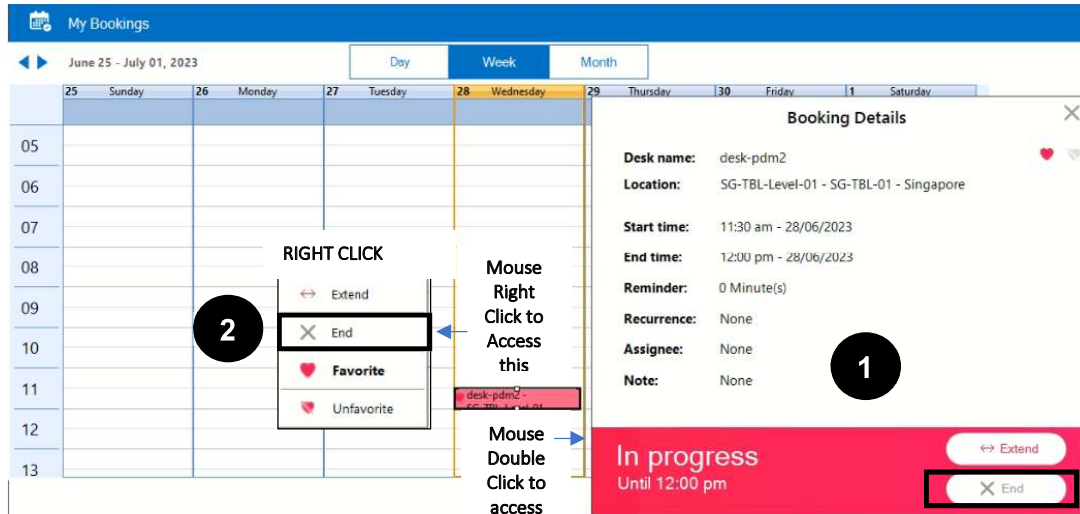
## 4.5.3.4 End Booking

To end a booking –

1. From 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.

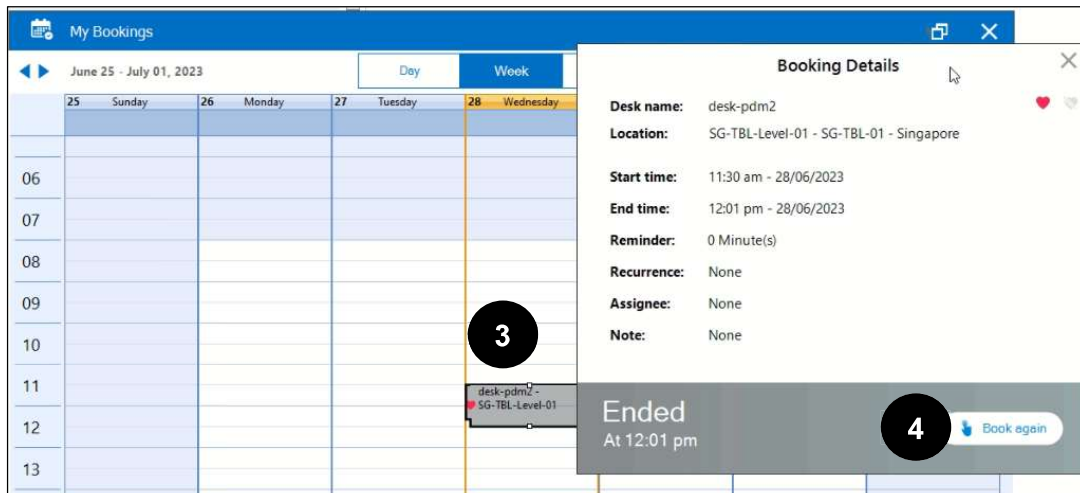3. The booking timeslot is updated accordingly in the calendar window (timeslot indicated in grey color).



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**.

## 4.5.4  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**.
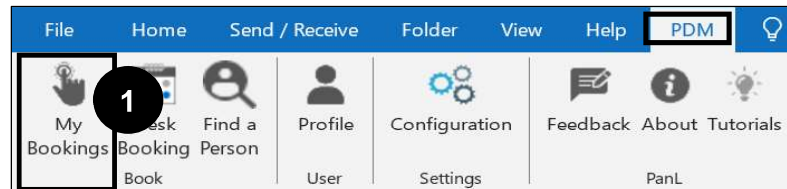


2.  The bookings, if any, are displayed in the calendar view. Double-click on the booking to view the details of the booking. *Blue – Booked, Orange - Pending Claim, Red - In Progress, Grey – Ended*.

## 4.5.5  Feedback

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

To send feedback –

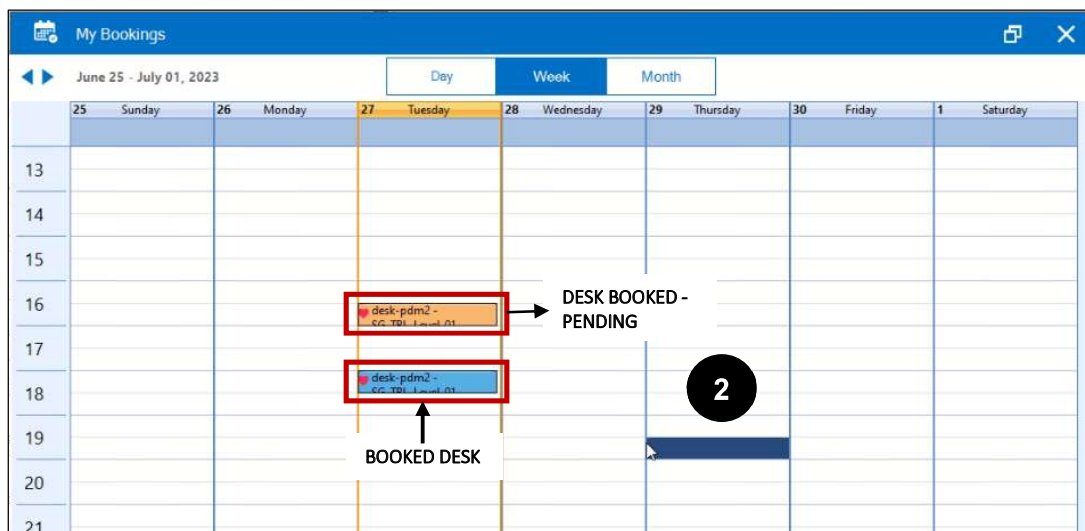1.  From the top bar menu, click **PDM > Feedback**.
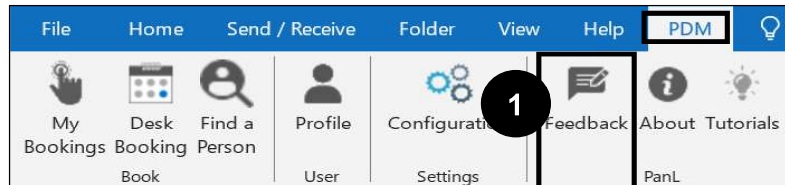


2.  The Feedback interface is displayed with a set of pre-defined feedback options (preset in the PDM console under Feedback Management by the admin). Click and choose any of the options. If the option **Other** is chosen, the user may type in customized feedback. Upon providing the feedback, click **[Send]**.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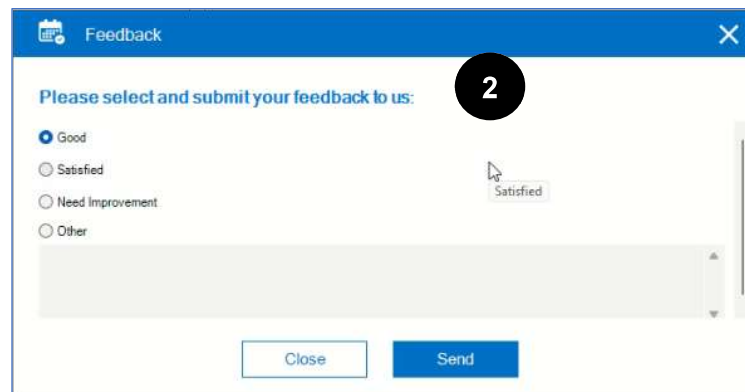
## 4.5.6  About

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**.



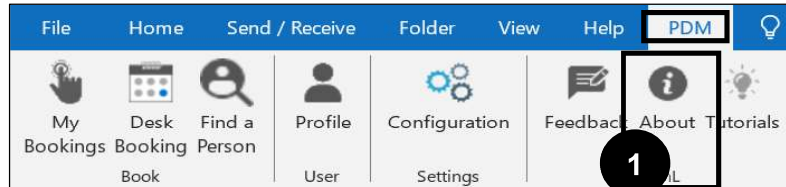2. The About interface displays the PDM Outlook Add in Version, as well as the organization admin contact details. It also displays the links for accessing the Software License, Open-Source Licenses and Privacy Policy information.
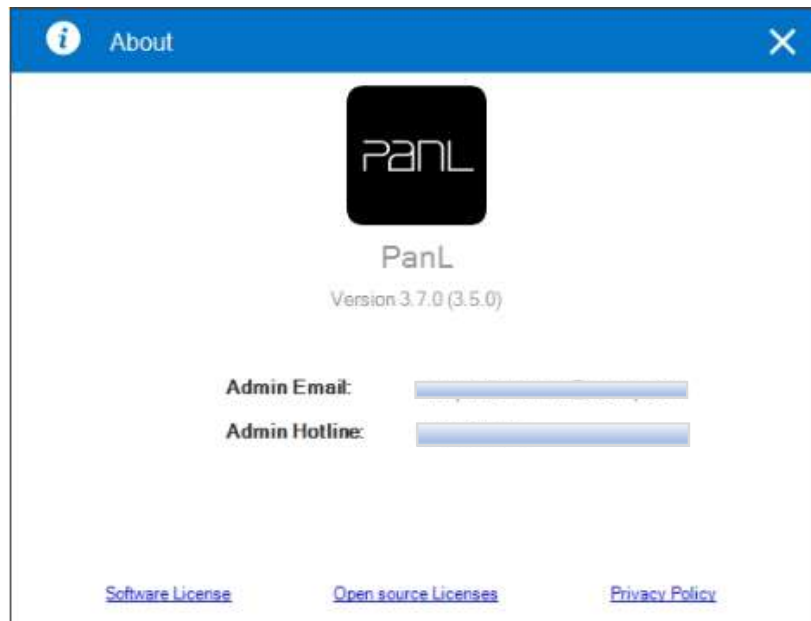


Refer to the section **4.9.3. Policy Settings** in BRTSYS AN 046 PDM User Guide - 3. PDM Management Console and Desk Viewer at https://brtsys.com/resources/ (Under PanL Desk Manager> Application Notes/Installation Guides/User Guides) for adding the product information.

# 5. Appendix

## 5.1 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 the 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. |

## 5.2 List of Figures

NA

## 5.3 List of Tables

# Revision History

Document Title          :          BRTSYS_AN_048 PDM User Guide - Outlook Add-In

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 |