

Service & Catering for TEOS

Installation & User Manual

Document revision 1.1

Overview

This document will explain how to setup and use the Service & Catering module from TEOS.

Requirements

- From Manage for TEOS 3.3
- Service and catering can be used by employees using the TEOS Outlook add-in and the employee app web version.
- Outlook 2019+ with O365 or exchange (**O365 web access not compatible**)
- Please refer to the Release note of the latest Manage for TEOS Version
- Access to Manage for TEOS Server from the internal network, by VPN or NAT from the client PC using the Outlook Add-in
- An HTTPS connection needs is mandatory for this usage. A certificate needs to be purchased by the customer to use this feature.
- From Version 3.3 a new business model has been created which is the TEM-SP30.(1,3,5)Y which is one per room
- Access to TEOS URL and possibility to add the addin:
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>

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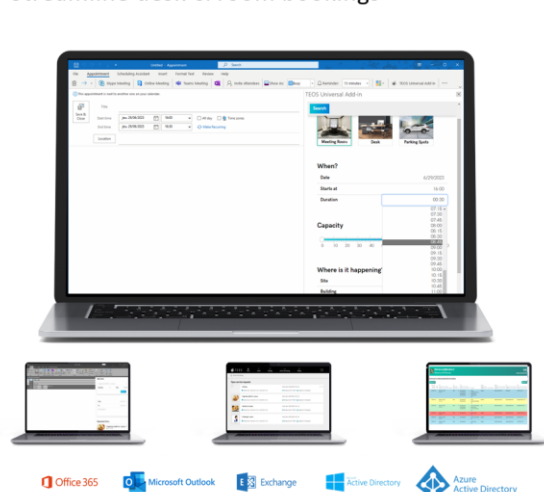
1. Service and Catering functionality

The service and catering functionality has been created to add another step after the booking of meeting room which gives the possibility to deliver services created by the company on dedicated meeting rooms. Ability to schedule catering items and associated workflows for vendors, such as a dashboard and functions to manage the status of requests.

TEOS version 3.2 will offer:

- The possibility to manage 2 categories of products per room which can be customized and created without limit.
- Have a product element such as description of it, the amount of products available, the the cost per product, the cut off time (maximum time allow to change product request), image of the product, setup time and clean time.
- Define vendors for the products who will be able then to follow the dashboard of requests and track them from a new request to the delivery.
- A platform admin can see the complete list and create service and catering on behalf of users where even users from the outlook add-in and employee app can request services and define also host

Streamline desk & room bookings



What it is:
An Outlook Add-In for employees to search for and book rooms by location, capacity or equipment. From version 3.2 version of TEOS, Service & Catering request can be done via the same channel

Top 3 benefits:

- Search room from Outlook
- Select room to book in Outlook
- Warn users on room usage
- Book service and catering

Main functions:

- Search rooms based on date, duration, capacity location, equipment
- Select room which push email and date/time to outlook invite
- Warn user with dedicated message per room when booking
- Book Service and catering with nbr of invitees, dep/cost center, quantities, note, additional host, time to receive the booking
- Get notified of the status of the service and catering

From version 3.3, new features and bug fixes as been implemented



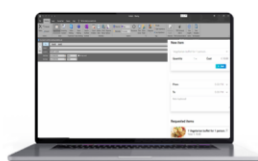
Improved

- Management from the employee app and outlook add-in of the recurring meetings.
- Conflict management from the employee app together with Microsoft365 environment
- Tentative state management within the vendor view and autocancel in case the status is not changed
- Other bug fixes and workflows has been improved in the service and catering process



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2. Create your site within your site and manage it

Manage for TEOS enables building and site management. For this usage the workflow is to create a Site Management environment.

TEOS takes into consideration the following spaces:

- Company (higher group level with company name)
 - o Site (which contains Buildings)
 - Building (containing floors)
 - Floor (containing different spaces)
 - o Meeting Room (can contain, room booking, display, device control or just resource)
 - o Open Space (can contain Signage, device control)
 - o Closed Office (can contain Signage, device control)
 - o Common Area (can contain Signage, device control)
 - o Desk (agenda management)
 - o Desk zones (agenda management for a zone)
 - o Parking zones (agenda management for a zone)

2.1. Create a new site environment in Manage for TEOS

Go to Site Management and Site Configuration. In Site Configuration click on " Add device group"

Edit
On this page you can create or edit your different group. Define the name for the group will be used in TEOS.

General | Tenants | Default schedule | Tenants | Service and catering | Incident Management

General

Name: Sony

Parent: [Select a Parent of the group]

Group type: Company (Define the group type (example: Company, building, desk))

Monthly Quota report email: []

Active Directory Group: []

Maximum Occupancy: []

Image/logo: [Browse... Remove Image]

Time Zone: (UTC+01:00) Brussels, Copenhagen, Madrid, Paris

Address: []

Zipcode: []

Latitude: []

Longitude: []

Time zone address and longitudes are used when you are in multi-site and multi country management. Longitude can be used for the wayfinding module map

You can add a specific image (for logo in the Site Overview) and define the address information

We recommend creating the following hierarchy as it is detailed in the example below. Of course, the hierarchy is decided by each customer depending on their needs.

- 1st level - Company



- 2nd level - Site



- 3rd level - Building



- 4th level - Floor



- 5th level - Spaces



Meeting Room



Open Space



Desk



Reception



Closed Office



Desk Zone



Restaurant



Common Area



Parking

2.2. Create Meeting rooms.

When Creating a Meeting room group type In Site Configuration there is additional information that is needed for the meeting rooms to be visible in the Employee App.

Edit
On this page you can create or edit your different groups, such as buildings, floors, meeting rooms, etc. which will be used in TEOS.

General
Meeting Room
Default schedule
Travel times
Service and catering
Incident Management

General

Name
Google Room 01
?

Parent
Guillaume Home - Floor 01
?

Group type
Meeting Room
?

Active Directory Group
?

Maximum Occupancy
?

Image/logo
Browse...
Remove image
?

Edit your meeting room and go to "Meeting Room" tab.

With this tab, you can add a description for the meeting room visible in the Employee App. You can define the room capacity, add a check-in-time before the meeting starts and cancel time for check-in after meeting starts (for room booking).

You can add an incident email address and allow special services (catering) defining the default email address to receive the request.

Add the equipments link with the meeting room (visible In Employee App filtering and resources). Equipment can be created in the administration tab and equipment management. An image of the equipment can be added. You can also define the user groups that can see the room (by selecting the group having access to the meeting room)

The content part is linked with the Room Booking tablet, the calendar of the room (O365, Microsoft Exchange, Google Calendar, TEOS Calendar), for the calendar the domain of the calendar must be accessible from TEOS. You can link a room control interface and define the BRAVIA interface for the room.

Meeting rooms need to be created with a calendar and with the assignment of service and catering to be able to propose them to the users.

3. Creating vendors for the management of services

A vendor is the provider of the service, it can be a subcontractor or even people from a service within the company. The vendors definition in TEOS will allow to split different “groups” who can oversee different services or catering which doesn’t need to be shared with all the groups. For example, a vendor can be the AV service provider which provides the man power to install meeting rooms according to a demand and another vendor can be the catering provider. Go to Site Management > Vendors and click new vendor. Define a general email address for the vendor and a name. You will need then to create a user under administration > users or with Azure AD a dedicated group for your vendor because a user account need to be assigned to the vendor account

Under Administration > users your previously added vendor, for the user to be able to login under this specific profile

4. Configuring Service and catering

Go to Site Management > Service and catering and click “Add product list”. Under this list the vendor created just before can be selected. If not selected, all the users having visibility on the service and catering tab will be able to see the services requests.

Define a Name for the service or catering category or dedicated room.

Create then the list of products you want to proposer for your service or catering **(only one service list and one catering list can be assigned per meeting room)**

For the product you can define:

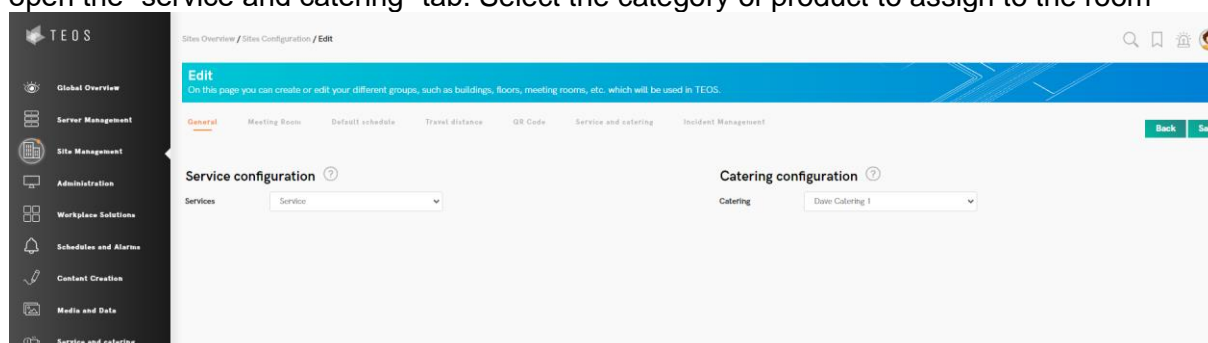
- Name of the product (example: Coffee)
- Description of the product (example: coffee served with one sugar)
- Cost per unit (in the example is the cost per coffee)
- Cut-off time in hours to define how much time is required before requested to prepare. If a request is under this time, the product cannot be requested and if the user want to change the quantity for example or remove the order during the cut-off time, he cannot do it. A communication with the vendor or the administrator must be done.
- Set-up time in minute needed (for services for example), just shown as a warning for the user to consider this time in his booking)

- Clean down time (same as set-up time for the clean down after the service is done)
- Minimum amount of product which can be requested per day.
- Maximum of products which can be requested per day.
- Image of the product can be uploaded.

After creating the categories of products, you will be able to assign your product categories to your meeting rooms.

5. Assigning service and catering to meeting rooms

Go to Site Management > Site configuration and select or a building level, or a floor level if you want your service and catering to be assigned to all your meeting rooms. If you want your service and catering to be assigned in your meeting room edit one of your meeting rooms and open the “service and catering” tab. Select the category of product to assign to the room

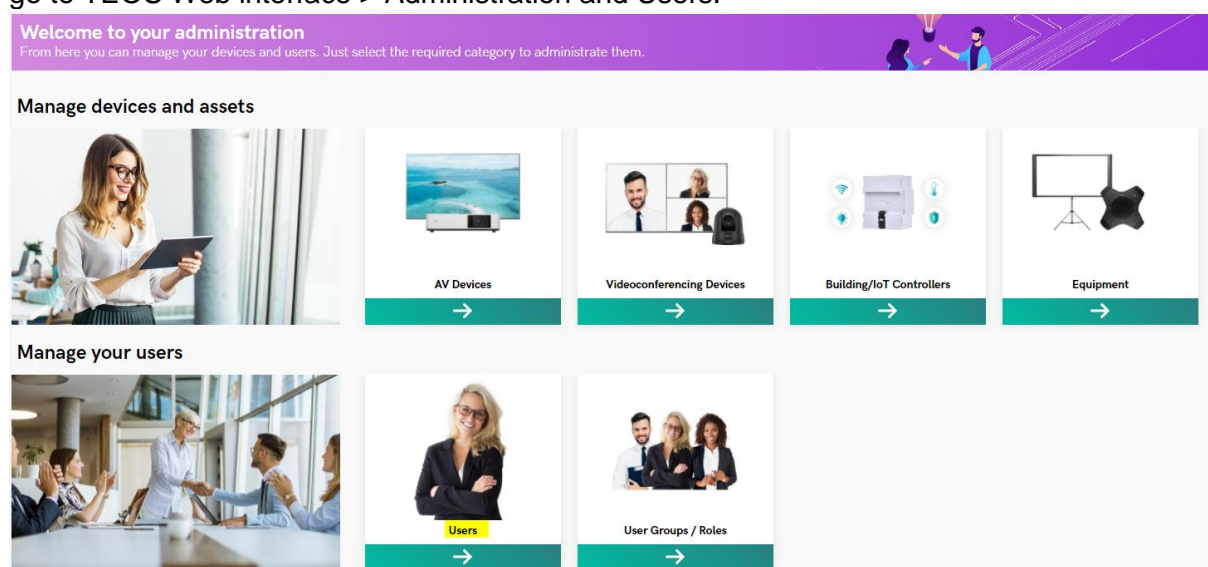


When this is done, the user will directly be able to see the service and catering proposition from the employee app or outlook add-in, but before, user will need to have access to the tools, which means he will need a user access and a license. User access is explained in the next section.

6. Creating users for authentication

6.1. Using TEOS User tab

To use the Outlook Add-in, the user will use an employee license and need to be identified within TEOS, for that he will need to have an account under users. To create a user account, go to TEOS Web interface > Administration and Users.



Click “Add new user”

Define the username, email address (should be the same as O365 email address) and password (mandatory). You can add change the language by default, define a phone number for the user (if using the reception option with SMS Service), the role of the user is linked with the User group, with profiles by default or customized groups to only access to a specific section of TEOS.

Device Localization will also give the rights to the user created to see the different meeting rooms for example.

6.2. Using Active Directory

Active directory synchronization will allow you to use a centralized point to create users and just synchronize the data with TEOS. This method is very useful for more simplicity on the user management and for a faster user creation. Please refer to the document Manage for TEOS – how to use AD. Please refer to the dedicated documentation to synchronize with Active Directory or with Azure AD and get the users from a central point.

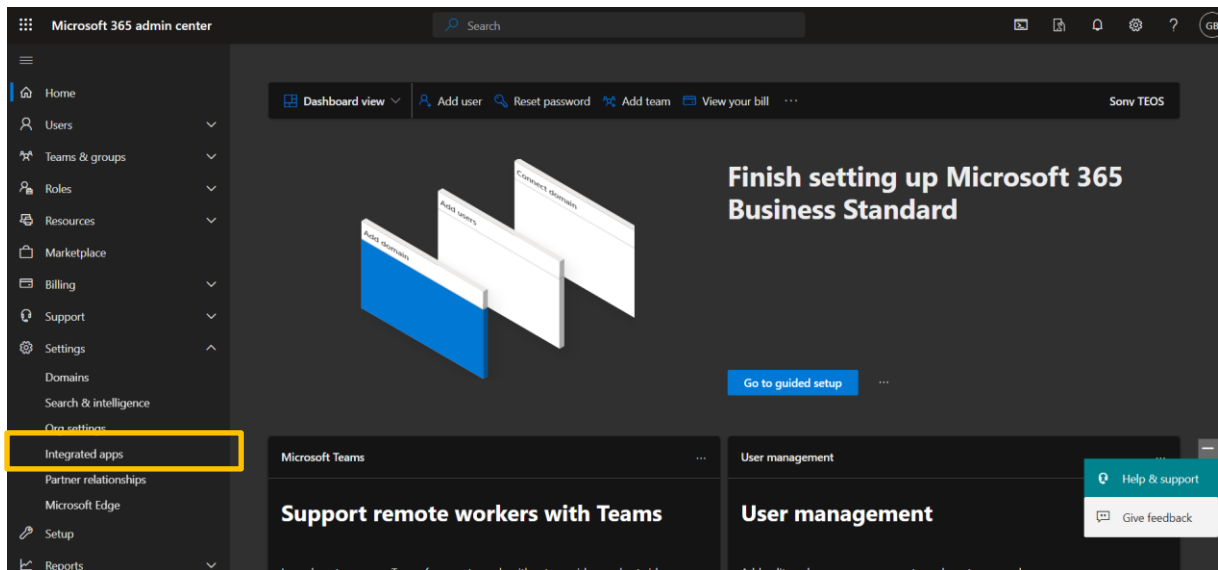
7. Install Outlook Add-in for TEOS

This section will explain how to install the Universal Outlook Add-in. Make sure your TEOS server is accessible from your outlook client, that TEOS is in https and can also access to O365 accounts.

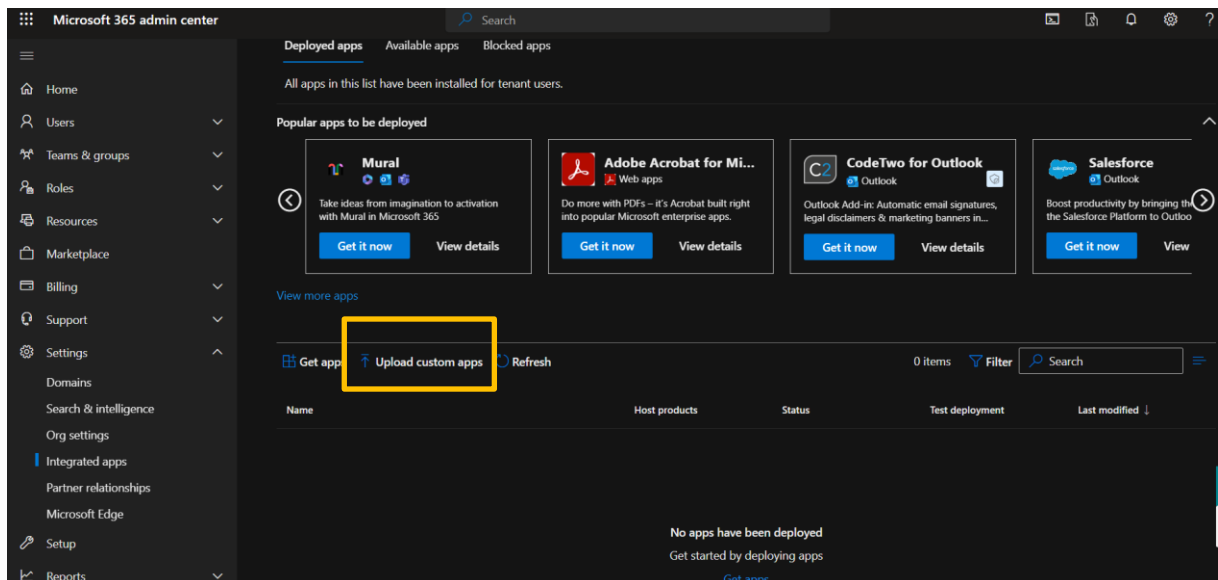
More important, make sure you user in identifies into TEOS users, you can use AD for more simplicity.

- 1) Deploy an Office Add-in using the admin center
<https://portal.office.com/Adminportal/Home/?#/homepage>

In the admin center, go to the settings > Integrated apps > Add-ins page.

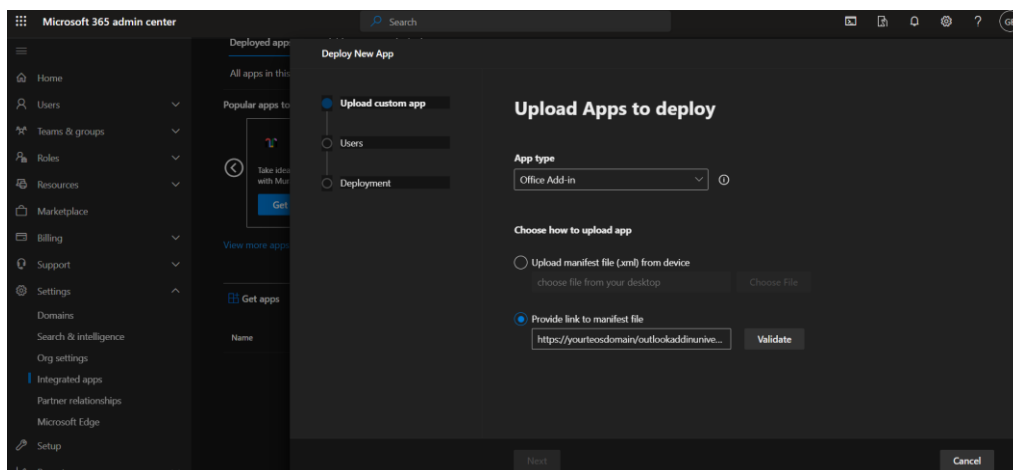


Select upload custom apps

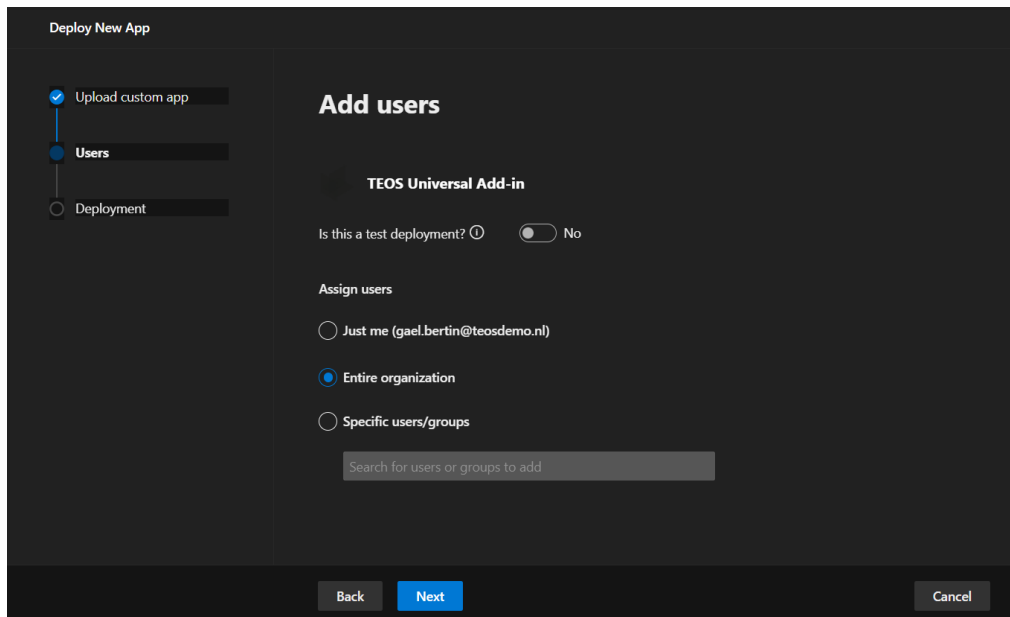


Insert the URL from your TEOS domain to get the manifest:

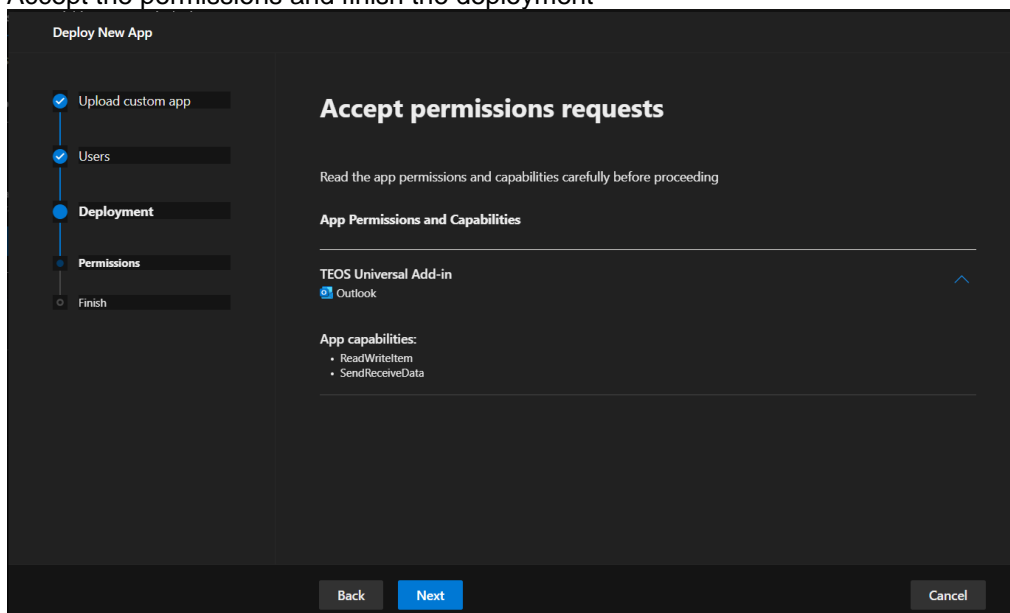
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>



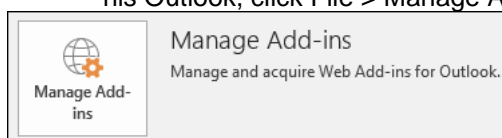
After validating select the users of the scope, it can be all organization or just a group



Accept the permissions and finish the deployment

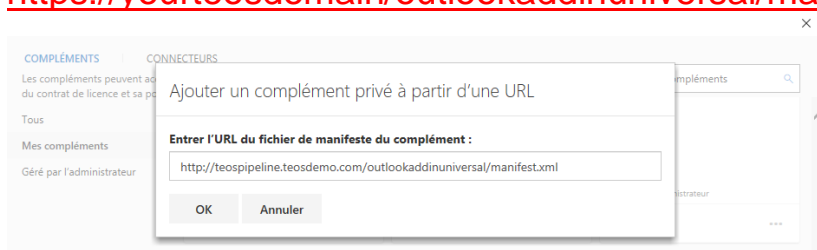


- 2) For a single user who wants to have it directly in his PC and has possibility to install add-ins in his Outlook, click File > Manage Add-ins. If you're using, click here.

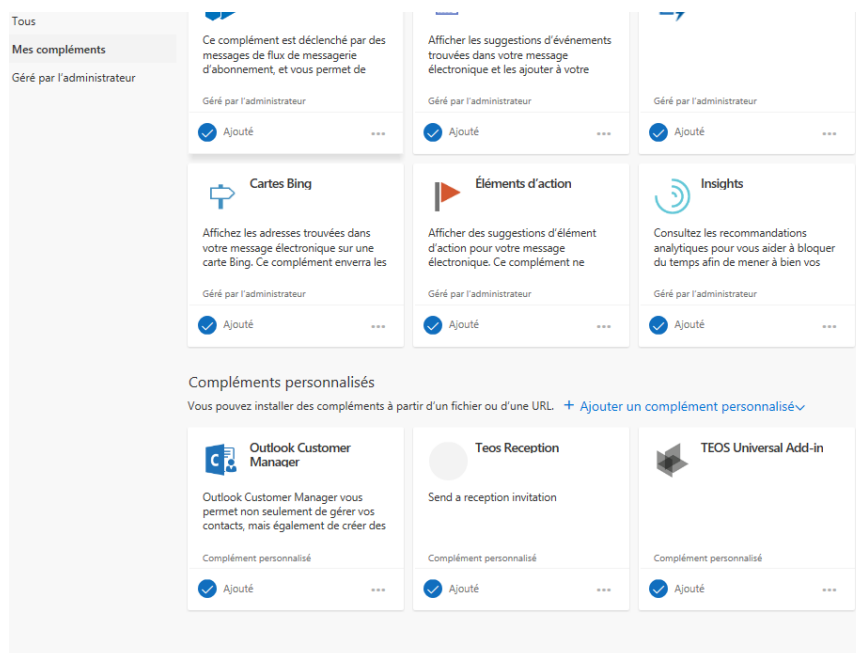


Click on "My add-ins" and press add an addin from a URL. Insert the following URL:

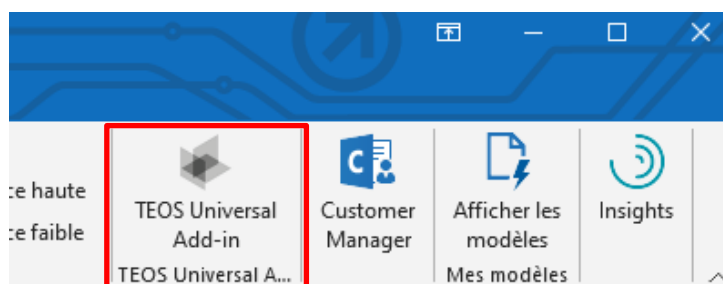
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>



Click ok and press install. Your add-in is added into outlook



To use it, you can go to calendars under Outlook and select a slot for a meeting. When the pop will appear, you will be able to see the Universal Add-in for TEOS with TEOS logo.



8. Using Outlook Add-in for TEOS

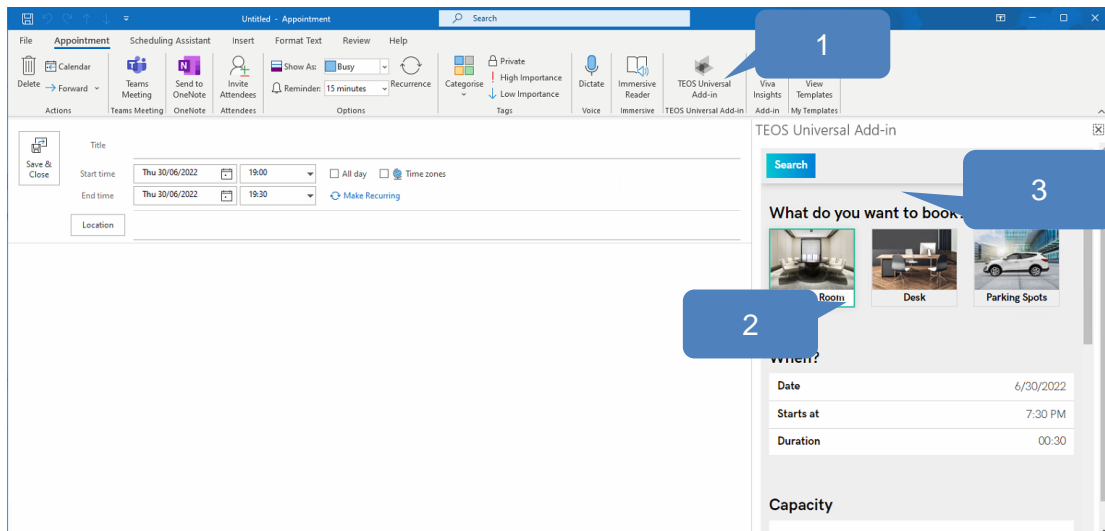
This section will give more details on the options proposed in the Universal Outlook Add-in for TEOS.

8.1. Search for a Room

Search for a room option is using Employee app mobile web frame to be able to give more options on the meeting room research, using the filters:

- Date and time
- Location (building, floors etc)
- Capacity (number of seats)
- Equipments (Under Administration for TEOS)

When pressing the Universal add-in for TEOS, TEOS will check if you are user in the platform and request O365 calendars for you too see your meetings plan and to book you need to applied the filter and press search



The different available filters are:

- When?
 - Define Date
 - Starts at (to define the time)
 - Duration of the booking
 - From version 3.3 recurring research is possible, but the conflicts are only reported back after the invite sent according to

Search

When?

Start

13-08-2024 18:30

Duration

00:30

Every

↑ Week ▾

Days

☐ Mon
 ☐ Tue
 ☐ Wed
 ☐ Thu
 ☐ Fri
 ☐ Sat
 ☐ Sun

End date

2024-08-19

Filter based on capacity of the space

Capacity

0
10
20

Filter based on the localization, you can choose the site and the building

Where is it happening?

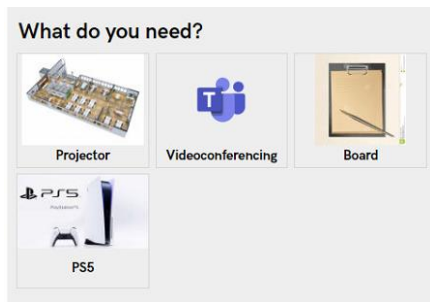
Site

No preference

Building

No preference

Filter based on equipment



Press search on the top to get the list of spaces available.

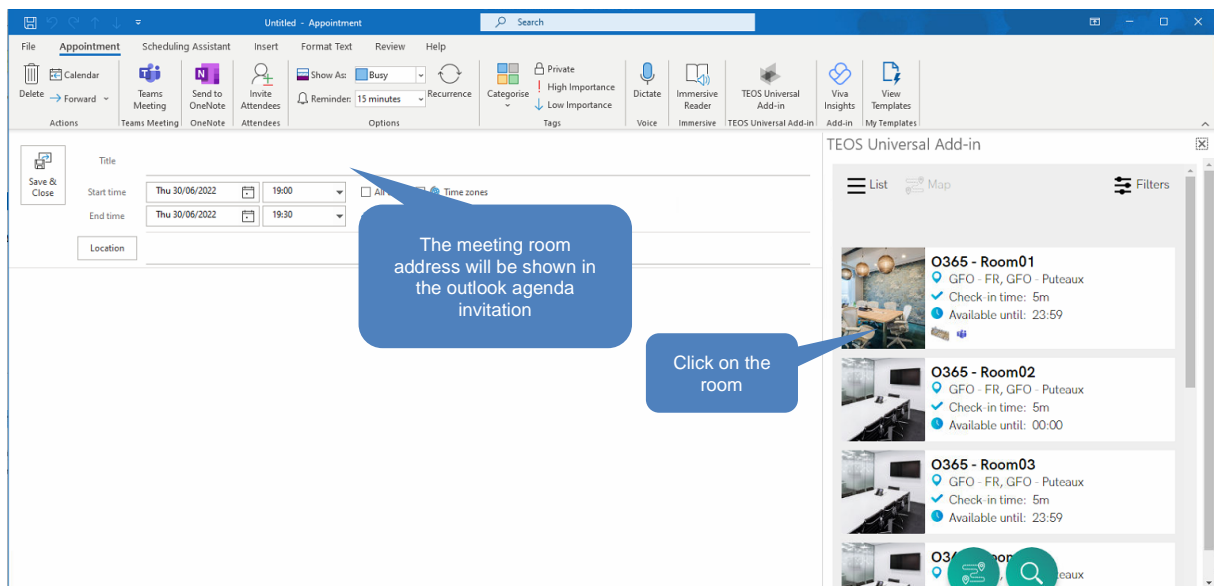
TEOS Universal Add-in

Search

When?

Date	6/30/2022
Starts at	7:30 PM
Duration	00:30

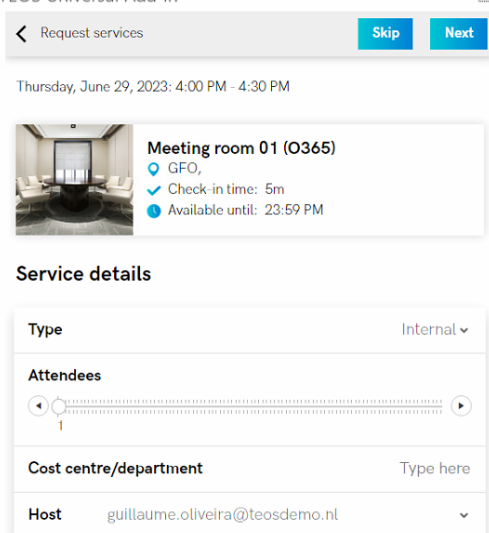
When research is done, click on the meeting room you want to use to be able to place it in the Outlook Agenda to invite the room.



8.2. Request Service and Catering

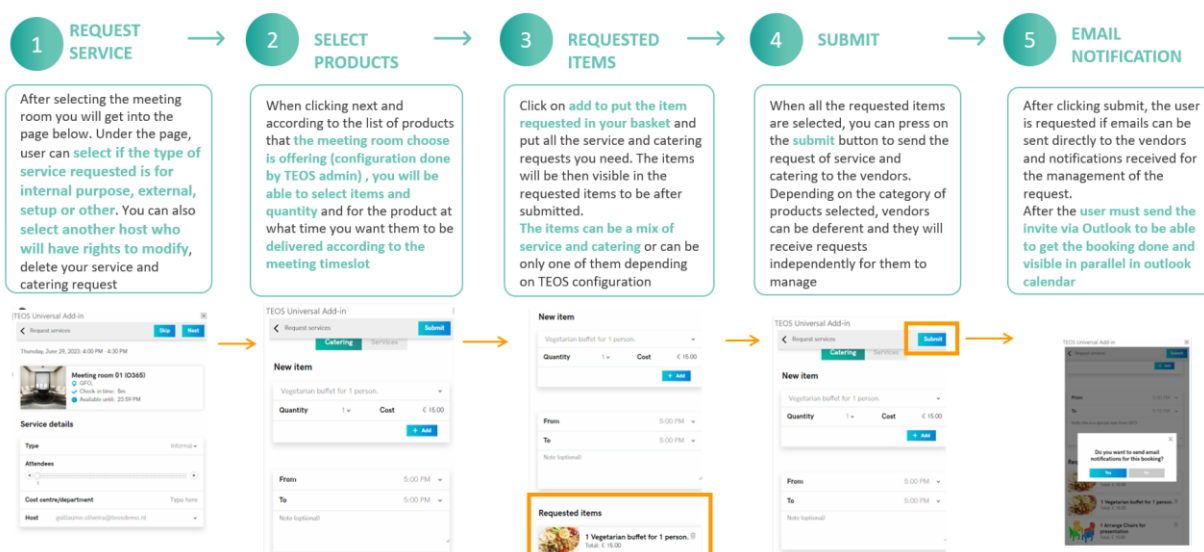
After selecting the room, and if the room is proposing Service and Catering you will be able to select the number of attendees and the type of meeting and also cost center/department (to be reported into TEOS vendor platform which can be force to be added by user) and you can also select a host who will be able to see and have the same rights with the service requested.

TEOS Universal Add-in



Next steps for service and catering will allow user to select the products available the time they need to be served and a note, add them and submit the request which will be sent then to the vendors in TEOS Admin platform.

Situation: The employee just search for the room via the TEOS add-in, and the room is proposing service and/or catering



When finishing to use the outlook add-in, it is important to send the invite via Outlook, otherwise the booking will not be done on O365

Rooms added into the outlook invite

Date and time are also synchronise according to the filter of date and duration

When service and catering is request a direct URL to the employee app is visible and when clicking send user to his list of service and catering

TEOS Universal Add-in

15:21
28 July 2023

Hello Guillaume Fernandes Oliveira
Welcome to your TEOS app

Your check-in QR Code
QR code to check in

Current reservation

Personal statistics

44	1346	30m
Reservations total	Minutes reserved	Average reservation time

9. Service and Catering in Employee app

From version 3.2 of TEOS the service and catering function has been developed to provide a dedicated page and a workflow which can be used with the employee app (only web) and with an Outlook add-in. The configuration of the product of service and Catering is explained in a dedicated documentation.

The user interaction can be directly done after choosing the meeting and if the meeting room proposes the services, the user can skip or continue in the catering request steps.

TEOS

Home Search Bookings Service and catering Settings

< Request services Skip Next

vendredi 28 juillet 2023: 17:30 - 18:00

Meeting room 01 (O365)
GFO,
Check-in time: 5m
Available until: 23:59 PM

Service details

Type Internal

Attendees

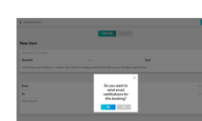
Cost centre/department Type here

Host Guillaume Fernandes Oliveira

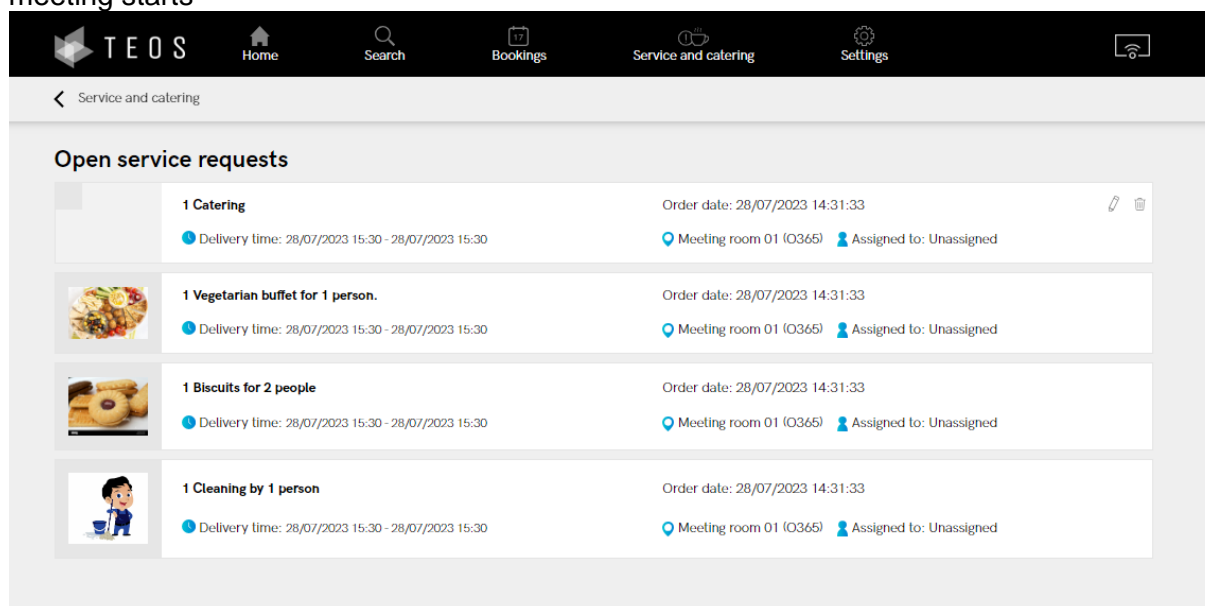
Service & Catering from TEOS Mobile, Employee App



Situation: The employee just search for the room via the TEOS Employee web app and the room is proposing service and/or catering



When the service and catering are requested, a dedicated tab is visible on the top of the page. Under open services request user will be able to edit his request or to remove it. A host can also do it if the organizer of the meeting and requester of the service and catering has designed him. The possibility to remove or edit a service and catering depends on the cut of time defined by administrator. For example a user cannot remove or edit a lunch request 6 hours before the meeting starts



Edit service

Type: Internal

Attending*: 10

Cost centre/department: [empty]

Host: Guillaume Fernandes Oliveira

Delivery time: 14:45

Vegetarian buffet for 1 person.

Min: 1 Max: 100

Add a comment:

Can you please put a lot of salad

Send status notifications: ☒

Cancel Confirm

When clicking on the edit button for a catering request, user will be able to edit the number attendees, the delivery time, the quantities of catering or service requested and add for example another comment. Notifications are send then by mail to the vendor and can be accessed in the vendor list.

Edit service

Type: Internal

Attending*: 10

Cost centre/department: [empty]

Host: Guillaume Fernandes Oliveira

Delivery time: 14:45

Vegetarian buffet for 1 person.

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