

Universal Outlook Add-in for TEOS

Installation & User Manual

Document revision 1.5

Overview

This document will explain how to install and use the Universal Add-in for TEOS compatible with Outlook using Office365 calendars

Requirements

- From Manage for TEOS 3.3
- Outlook 2019+ with O365 or exchange (**O365 web access not compatible**)
- Compatible with Single Sign On from version 3.3
- 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 add-in:
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>

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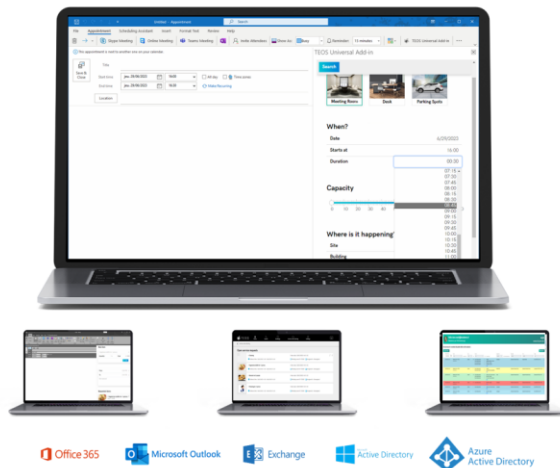
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1. Universal Outlook Add-in for TEOS workflow

Universal for TEOS is dedicated for the employees of a company.

This Add-in is centralizing different uses and needs from an employee. Using this Add-in, you can search for a room with more filter and add the room name into the agenda field of Outlook agenda. You will also be able to ask for service and catering using this outlook add-in

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



Main functions:

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

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)
 - Site (which contains Buildings)
 - Building (containing floors)
 - Floor (containing different spaces)
 - Meeting Room (can contain, room booking, display, device control or just resource)
 - Open Space (can contain Signage, device control)
 - Closed Office (can contain Signage, device control)
 - Common Area (can contain Signage, device control)
 - Desk (agenda management)
 - Desk zones (agenda management for a zone)
 - 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. will be used in TEOS.

General

Name: Sony

Parent:

Group type: Company

Monthly Quota report email:

Active Directory Group:

Maximum Occupancy:

Image/logo: [Browse...](#) [Remove Image](#)

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

Address:

Zipcode:

Latitude:

Longitude:

Define the name for the group

Select a Parent of the group

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

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



Reception



Restaurant



Open Space



Closed Office



Common Area



Desk



Desk Zone



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.

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

Back

Save

Settings

Active

☒

Room type

Description

Capacity

10

Early check-in and cancel

5

?

Cancel time

5

?

Unavailable after each meeting

☐

?

Allow special services

☐

Special services mail address

Equipment

☒ Projector

☒ Videoconferencing

☒ Board

☐ Vibrating Massage Chair

User Groups / Roles

☐ Administrator

☐ Power User

☐ Facility Manager

☐ IT Manager

☐ AV Manager

☐ Communication Manager

☐ Content Creator

☐ Data Role

Content

Room booking presentation

New template

"Find another room" base localization

Guillaume Home - Floor 01

?

Meeting room calendar

Google Room 01

Export calendar events

Room control presentation

Mirroring Template

Meeting Interface

Meeting Display

GO Meeting Display

2.3. Creating a desk environment

When Creating a desk group type in Site Configuration there is some additional information that is needed for the Desk to be visible into the Employee App.

The screenshot shows the 'General' tab of a configuration form. It includes fields for 'Name' (Desk 01), 'Parent' (First floor), 'Group type' (Desk), 'Active Directory Group', 'Maximum Occupancy', and an 'image/logo' section with a 'Browse...' button and a 'Remove image' button. Below these fields is a placeholder image of a modern office desk with a lamp and some items on it.

Edit your Desk group and go to "Meeting Room" tab. With this tab, you can add a description for the Desk visible in the Employee App. You can define a check-in-time before desk usage starting and cancel time for check-in in the app.

You can add an incident email address for when the user reports an issue with the desk.

Add the equipments link with the Desk (visible in Employee App filtering and resources). Equipments can be created in 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 desk)

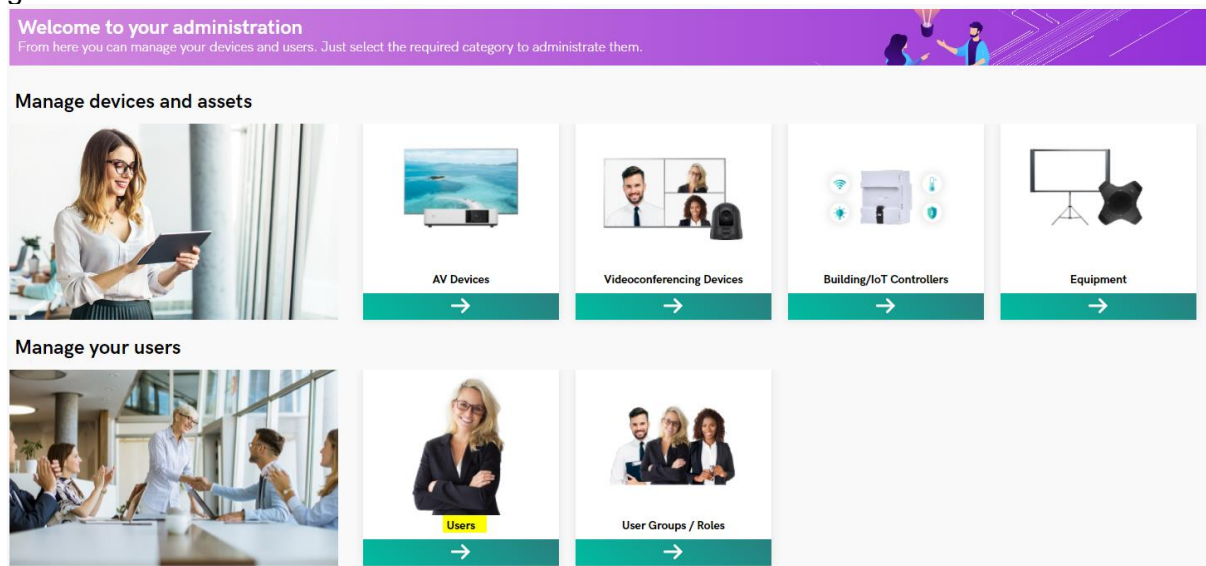
Content part is linked with the calendar of the desk (O365, Microsoft Exchange, Google Calendar, TEOS Calendar), for the calendar the domain of the calendar must be accessible from TEOS.

The screenshot shows the 'Edit' page for a desk configuration. The 'Desk' tab is selected. The 'Settings' section includes checkboxes for 'Active' and 'Allow special services', a 'Room type' dropdown, a 'Description' text area, 'Early check-in and cancel' and 'Cancel time' dropdowns, an 'Unavailable after each meeting' checkbox, a 'Special services mail address' text field, and 'Equipment' checkboxes for 'Projector' and 'Videoconferencing'. The 'User Groups / Roles' section lists various roles with checkboxes. The 'Content' section includes 'Desk booking presentation' and 'Meetings Schedule' dropdowns.

3. Creating users for authentication

3.1. 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 give also the rights to the user created to see the different meeting rooms for example.

3.2. 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

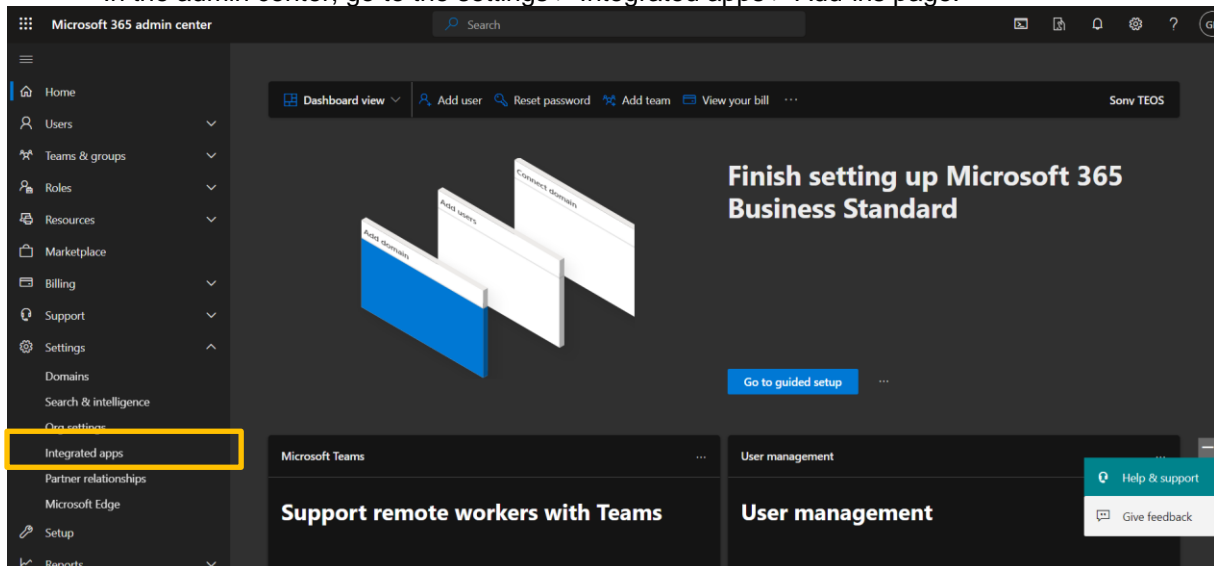
4. Install Outlook Add-in for TEOS

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.

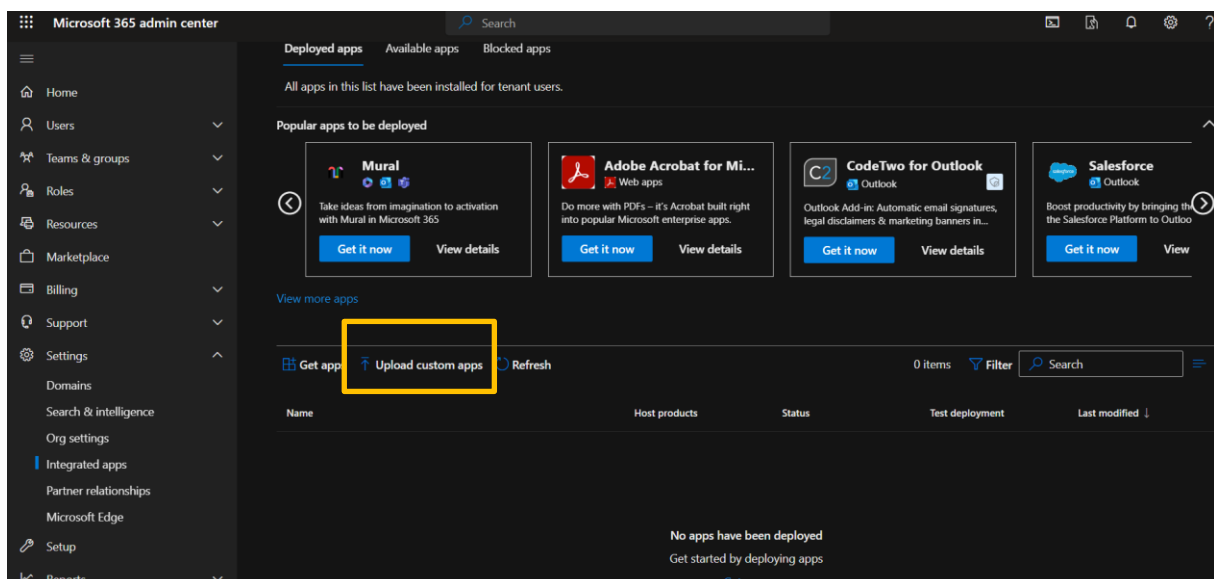
More important, make sure you user in identifies into TEOS users, you can use AD for more simplicity.

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

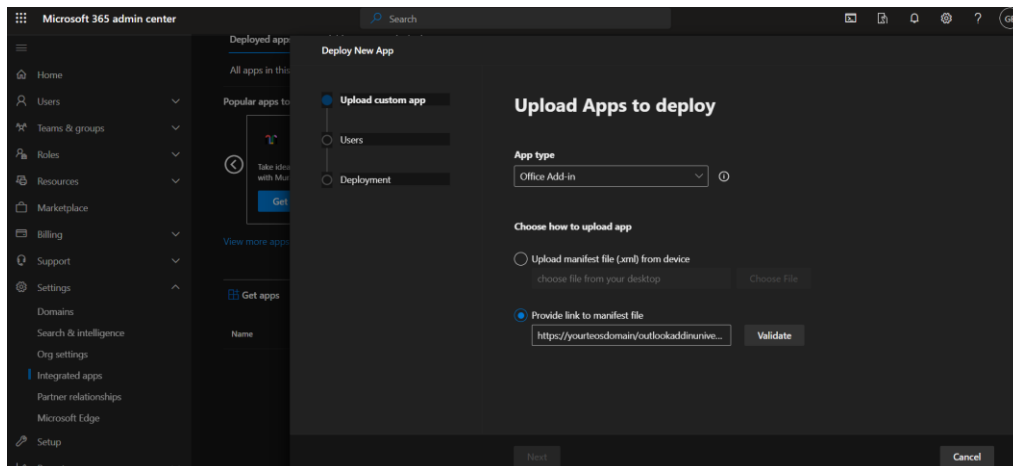
In the admin center, go to the settings > Integrated apps > Add-ins page.



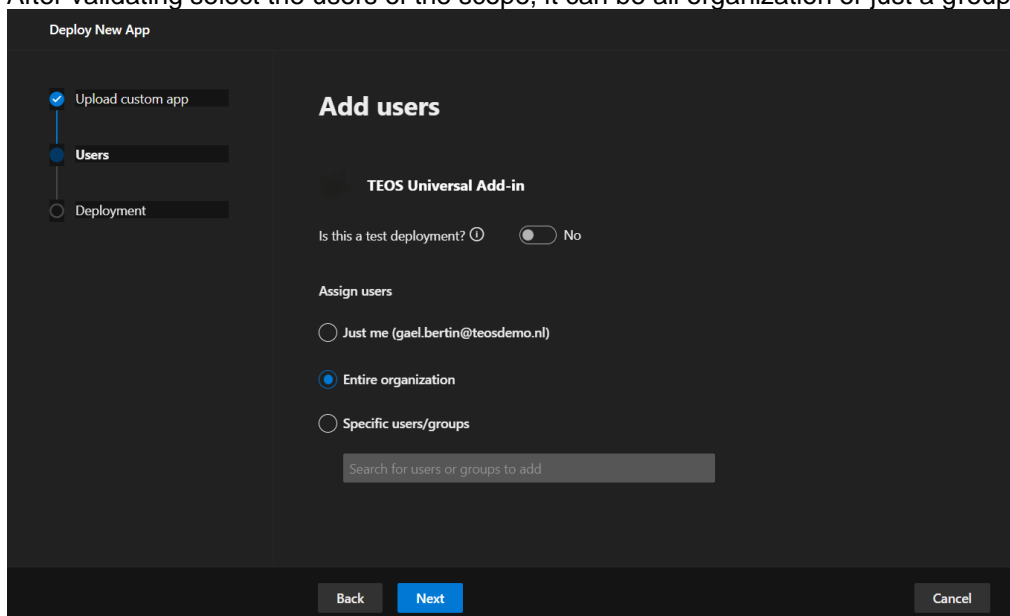
Select upload custom apps



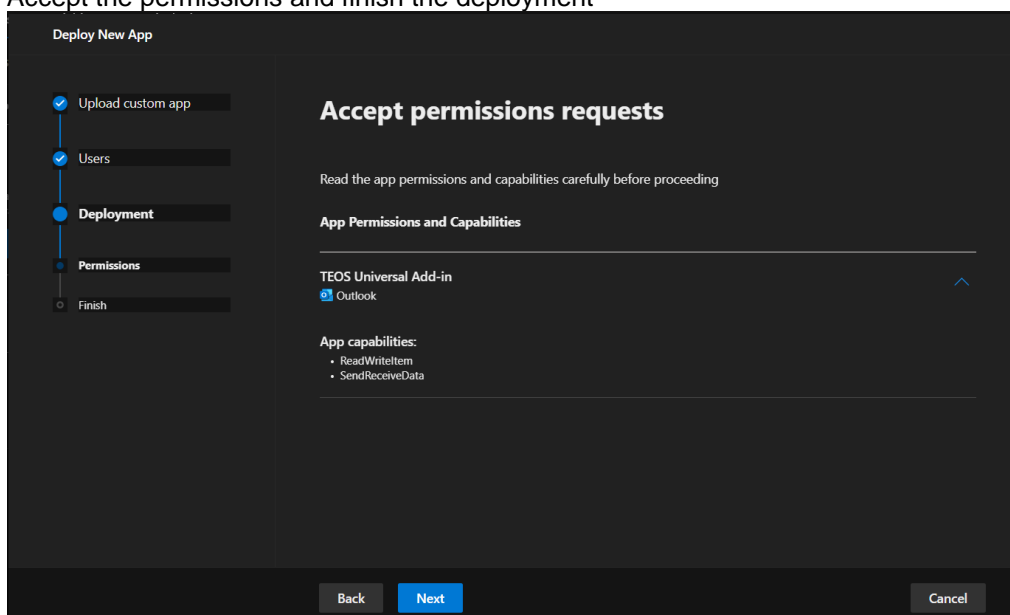
Insert the URL from your TEOS domain to get the manifest:
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>



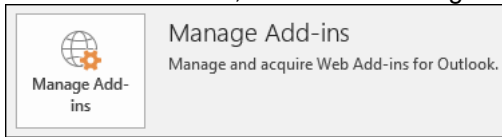
After validating select the users of the scope, it can be all organization or just a group



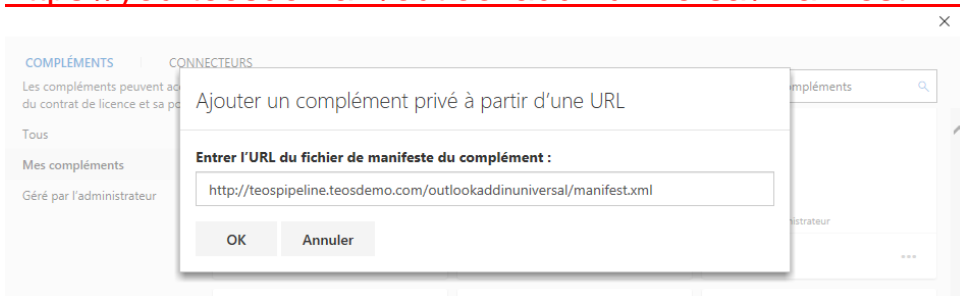
Accept the permissions and finish the deployment



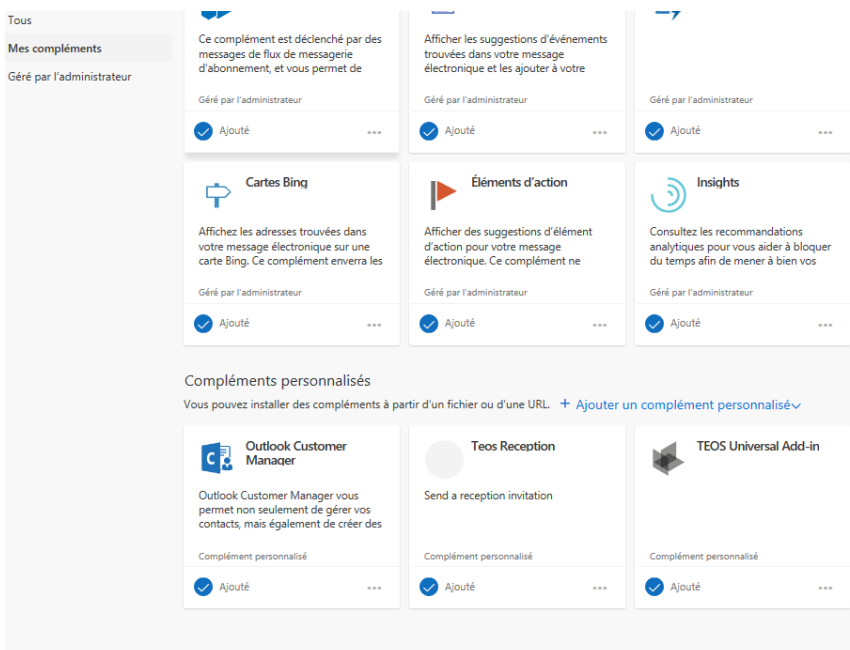
- 2) For a single user who wants to have it directly in his PC and has possibility to install add-ins in his Outlook, click File > Manage Add-ins. If you're using, click here.



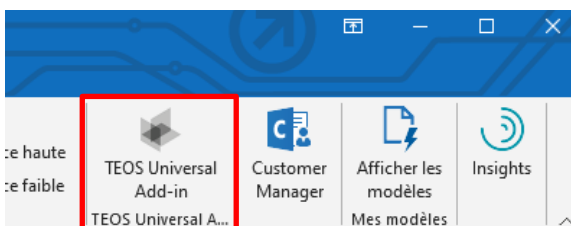
Click on "My add-ins" and press add an addin from a URL. Insert the following URL:
<https://yourteosdomain/outlookaddinuniversal/manifest.xml>



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.



5. Using the Universal Outlook Add-in for TEOS

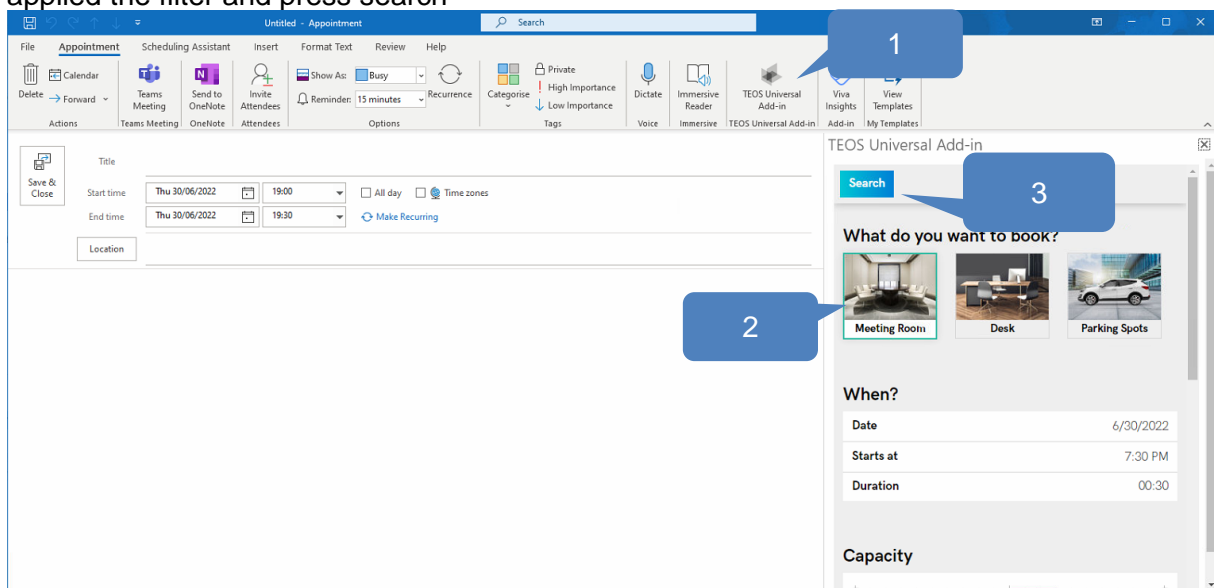
This section will give more details on the options proposed in the Universal Outlook Add-in for TEOS.

5.1. 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?
 - o Define Date
 - o Starts at (to define the time)
 - o Duration of the booking
 - o 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

1

Week

Days

☐ Mon

☐ Tue

☐ Wed

☐ Thu

☐ Fri

☐ Sat

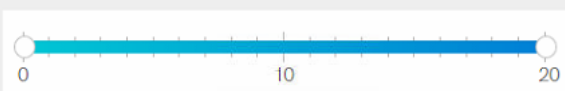
☐ Sun

End date

2024-08-19

Filter based on capacity of the space (the maximum is defined based on the capacity of the room configured in TEOS)

Capacity




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


What do you need?




Projector



Videoconferencing



Board



PS5

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

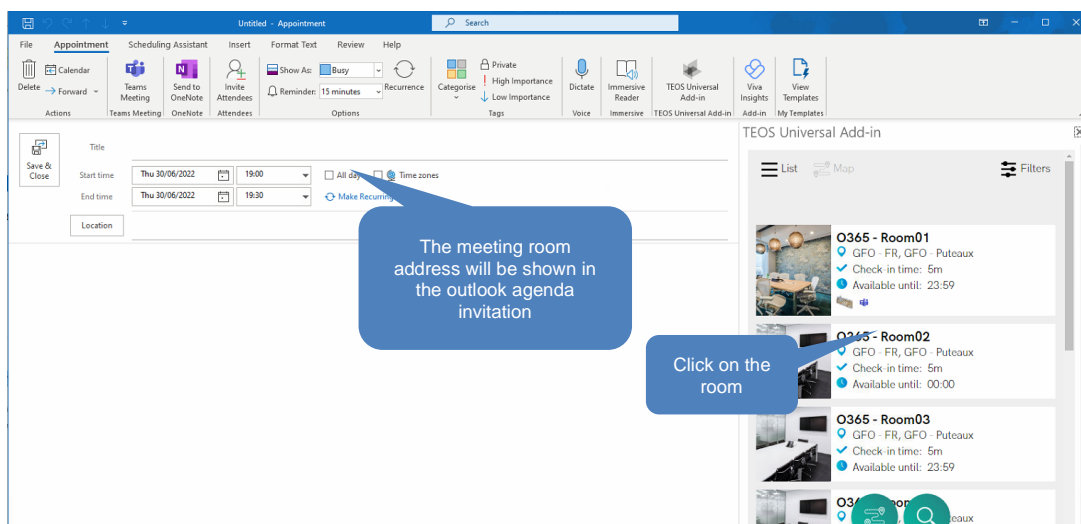
TEOS Universal Add-in

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.



The meeting room address will be shown in the outlook agenda invitation

Click on the room


5.2. 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 cost center/department (to be reported into TEOS vendor platform) and you can also select a host who will be able to see and have the same rights with the service requested. 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 cost center/department (to be reported into TEOS vendor platform) 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

< Request services Skip Next

Thursday, June 29, 2023: 4:00 PM - 4:30 PM



Meeting room 01 (0365)
 GFO,
 ✓ Check-in time: 5m
 ✓ Available until: 23:59 PM

Service details

Type: Internal

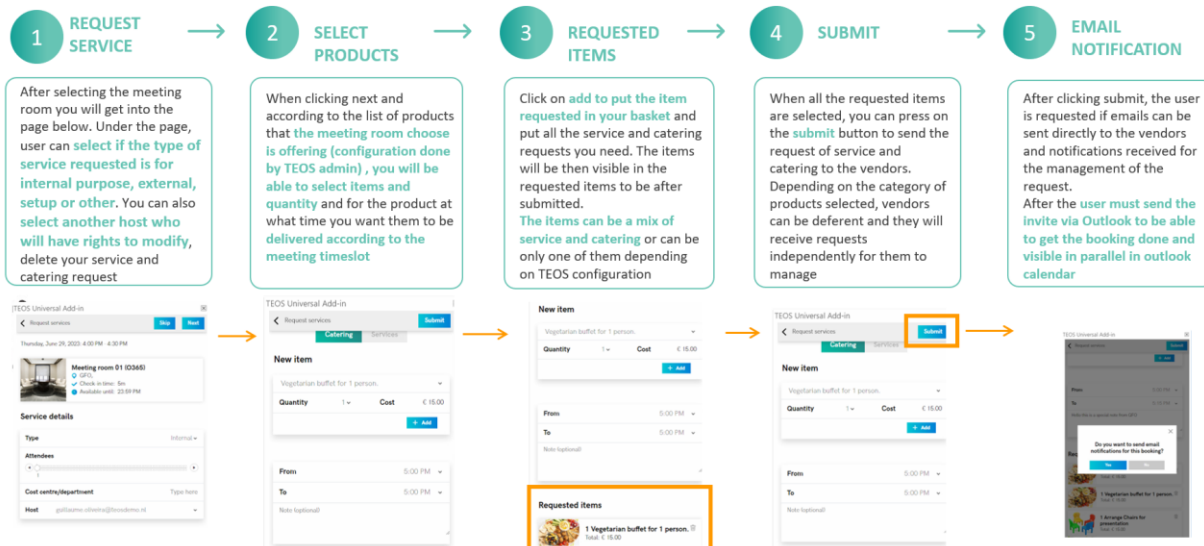
Attendees: 1

Cost centre/department: Type here

Host: gulllaume.oliveira@teosdemo.nl

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

The screenshot shows the Outlook 'Meeting' tab with a meeting invite for 'Microsoft Teams Meeting: room02'. Callouts provide the following information:

- Rooms added into the outlook invite:** Points to the 'Location' field showing 'Microsoft Teams Meeting: room02'.
- Date and time are also synchronise according to the filter of date and duration:** Points to the 'Start time' and 'End time' fields.
- When booking is done and service and catering is skipped or when service and catering is submitted and after the notification email popup is replied then the user will come into the following page with personal statistics:** Points to the 'Send' button.
- 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:** Points to a link below the meeting details.

On the right, the 'TEOS Universal Add-in' sidebar is visible, showing a welcome message for 'Halo Guillaume Fernandes Oliveira' and a 'Current reservation' section with personal statistics: 44 Reservations total, 1346 Minutes reserved, and 30m Average reservation time.

The request done is after visible under the Employee app within the Service and Catering tab. The requests can be edited and/or deleted if the cut of time allows it.

Situation: When the employee has ordered his service and catering, he can see the request in TEOS Employee app web portal and can still edit or delete is request, if it is allowed by the administration (based on cut off time)

The screenshot shows the 'Service and catering' section of the TEOS web portal. It lists four 'Open service requests':

- 1 Catering:** Delivery time: 28/07/2023 15:30 - 28/07/2023 15:30. Meeting room 01 IO365. Assigned to: Unassigned.
- 1 Vegetarian buffet for 1 person:** Delivery time: 28/07/2023 15:30 - 28/07/2023 15:30. Meeting room 01 IO365. Assigned to: Unassigned.
- 1 Biscuits for 2 people:** Delivery time: 28/07/2023 15:30 - 28/07/2023 15:30. Meeting room 01 IO365. Assigned to: Unassigned.
- 1 Cleaning by 1 person:** Delivery time: 28/07/2023 15:30 - 28/07/2023 15:30. Meeting room 01 IO365. Assigned to: Unassigned.

Callouts indicate:

- As the following product as a bigger cut off time he can still be edited or deleted:** Points to the edit/delete icons for the 'Catering' request.
- Order status and assignee can be visible for a user:** Points to the 'Assigned to: Unassigned' status.

Situation: When the employee has ordered his service and catering, but want to change one of his items

The screenshot shows the 'Edit service' modal in the TEOS app. It displays details for a 'Vegetarian buffet for 1 person' item, including the quantity (1), cost center, department, and host. A callout states:

Item is still present and cannot be changed, only the quantity can be modified. User can change the number of attendees, the cost center or department, the host (colleague who can have access to the item too)



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