# PlaceOS WIL Application Training

## Introduction

This document is a walk through for the PlaceOS WIL workplace application in order to get users familiar with the application. In the following sections, steps for each feature are described thoroughly with images and examples to make these processes easy to understand and to replicate.

To access the application, please visit reservations.wil.gsa.gov

### Overview

PlaceOS ONE bundles all the necessary workplace features:
1. Room Booking - Easily find & book rooms in real-time;
2. Desk Booking - Easily find & book desks in real-time;
3. Space Utilisation - Understand space utilisation across zones in real-time;
4. Invite Visitors - Easily invite visitors to the WIL space.

**NOTE:** PlaceOS ONE is a web application and it can be reached using any browser.
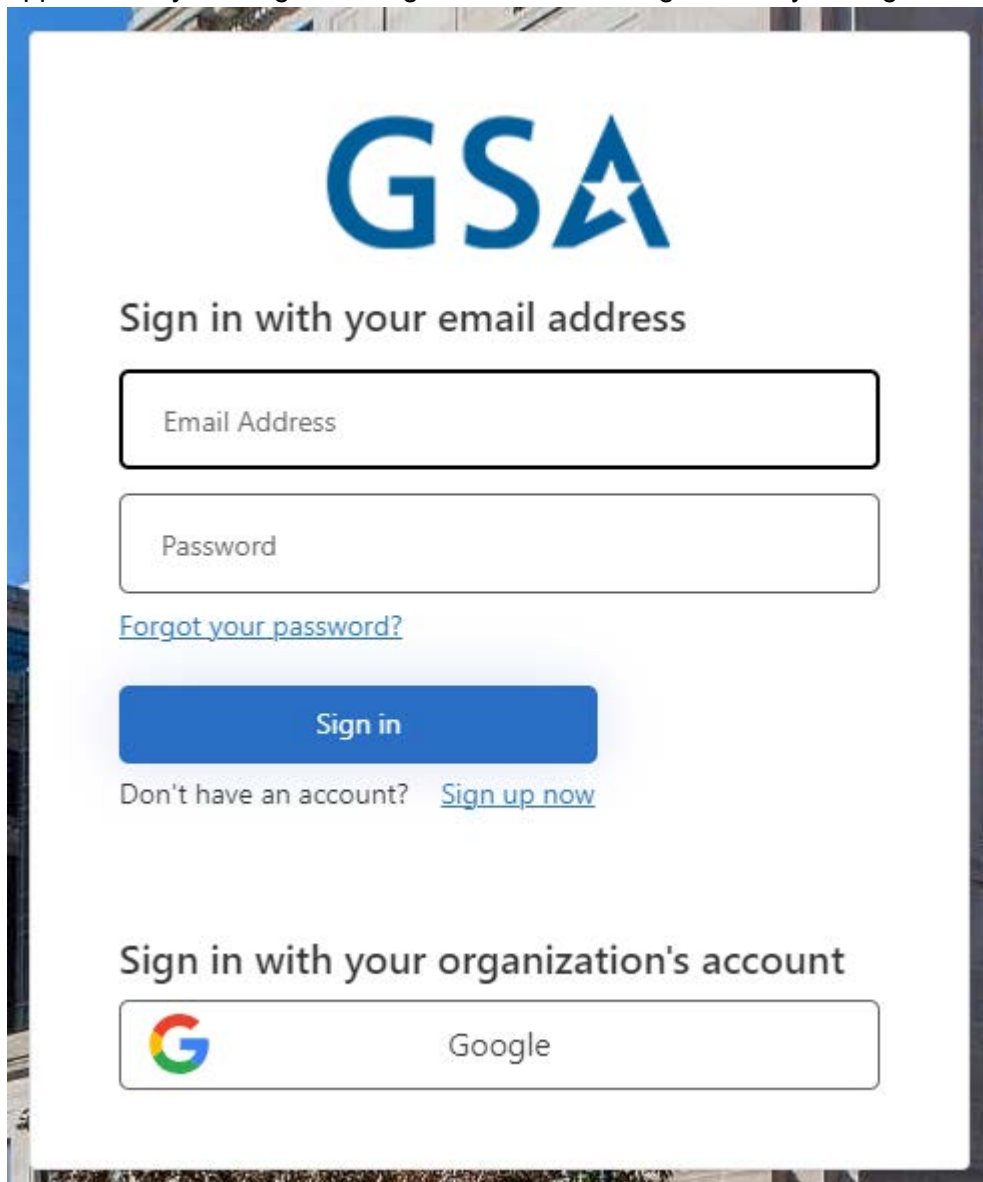
### Log In Process

When the application is opened on the browser, users will see a login page as shown in the image below.
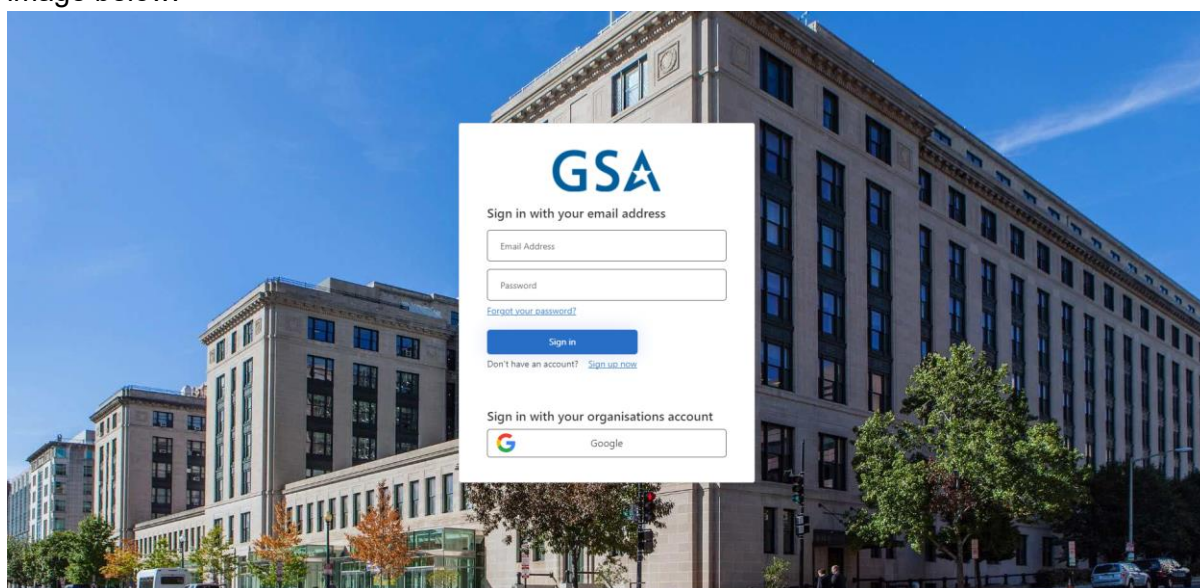


To log in to PlaceOS WIL workplace application, users will be required to follow two steps depending on the method they prefer:

## First Method: Google Credentials

If users have a google corporate account, they can use those credentials to log in onto the application by clicking the Google button under "Sign in with your organization's account".
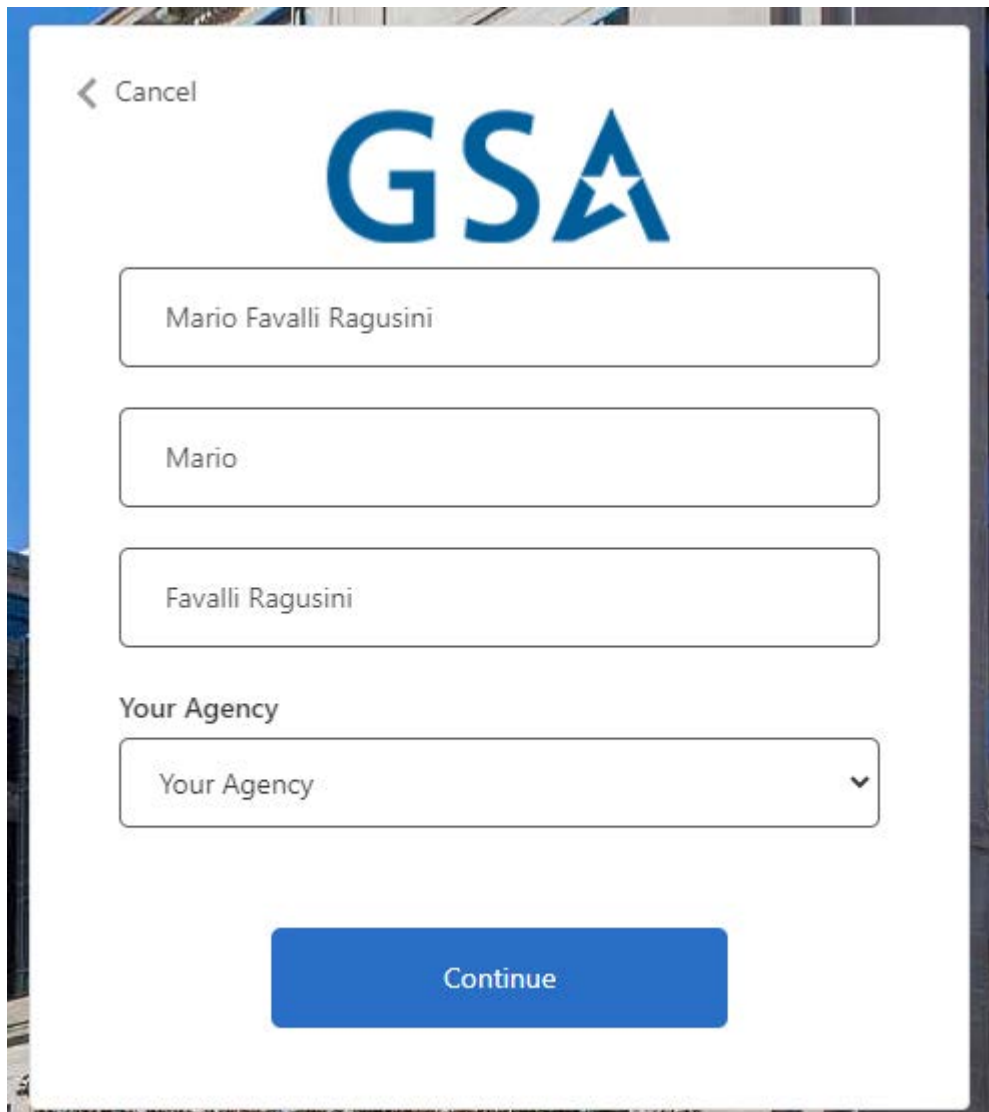


This will prompt the users to the MFA (Multi-Factor Authentication) where they will need to choose one option for the code to be sent and finalize the authentication process.
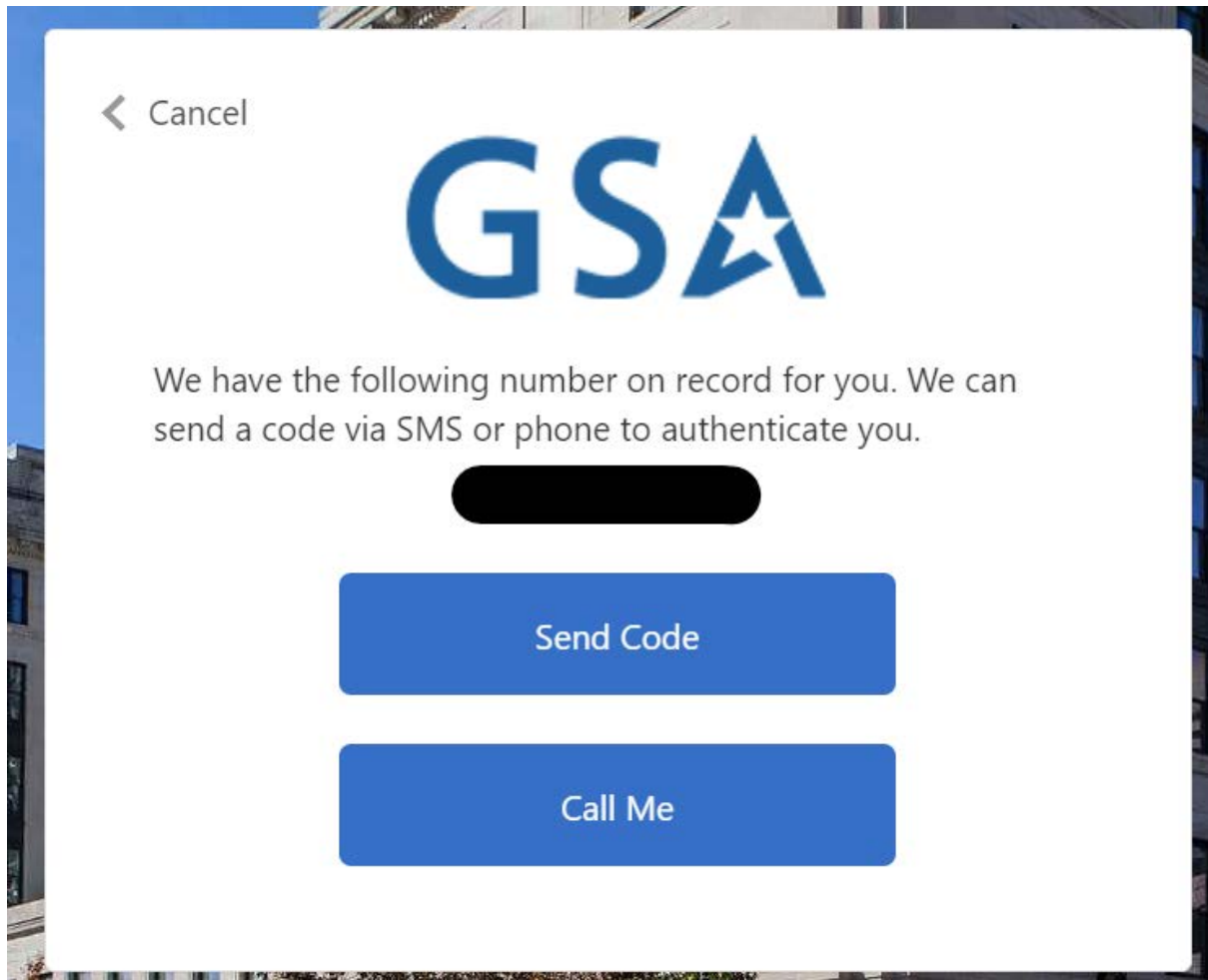
Depending on the option selected, users will receive a code or a call to authenticate and access the application.

**NOTE: When users log in for the first time, they will be asked to provide their agency as shown in the image below. This information will be asked only once - the first time users log in. This information will be used to show desk booking insights in the application.**

## Second Method: Sign in with your email address.

The second method is requested if users don't have a Google corporate email account and they want to access using email address and a password.

This is possible by clicking "**Sign up now**" if it is the first time they have logged in onto the application and an account needs to be created,

or "**Sign in**" if they have already created an account. In this case, users will need to provide credentials created the first time they have logged in onto the application in the designated text box.

**NOTE: The creation of a user account done by clicking the "Sign up now" option is required only one time. In this process, users are asked to provide their email address they want to register with, a password, a Display Name (a name used by the application to identify a person), a Given name - or first name - and a Surname - or Second Name.**

To validate the new users, the "Send verification code" needs to be clicked in order to trigger the MFA process and send a unique code to the email mailbox provided.

< Cancel

**GSA⭑**

Verification is necessary. Please click Send button.

Email Address

Send verification code

New Password

Confirm New Password

Display Name

Given Name

Surname

Create

The code will be sent via email to the email address provided as information as shown in the image below.

Microsoft on behalf of GSA <msonlineservicesteam@microsoftonline.com>  08:50 (1 minute ago)  ☆  ↩
to me ▾

### Verify your email address

Thanks for verifying your mario@place.technology account!

**Your code is:** ████████

Sincerely,
*GSA*

This message was sent from an unmonitored email address.
Please do not reply to this message.

GSA

**NOTE: If the "Create" button is clicked before the "Send Verification Code" button, the application won't create the user and it will show an error message as shown below.**



‹ Cancel

GSA

Claim not verified: Email Address

Verification code has been sent to your inbox. Please copy it to the input box below.
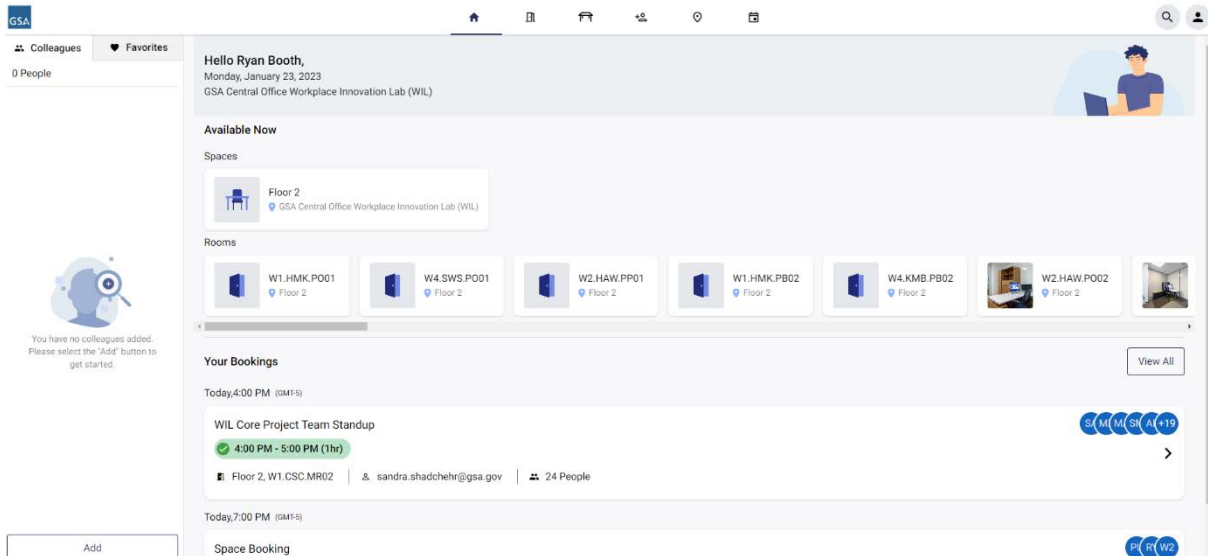
mario@place.technology

Verification code

Verify code     Send new code

# Landing Page

Once users will be logged in onto PlaceOS WIL workplace application, they will be redirected to the landing page where general information about the building and their day are shown alongside other information.



The page is subdivided into two main parts: the navigation bar at the top and the main canvas.

## Navigation Bar

The toolbar is used to navigate the workplace application and it contains the following:

 → Logo

 → Home Page

 → Book Room

 → Book Desk

 → Invite Visitor

 → Spaces (Interactive Map)

 → Your Bookings

In the toolbar, on the right end side, there are two additional icons:  is the "user" icon and if clicked, the user can see their account information and preferences such as Display Name and email address, the location, Display & Accessibility options, Language and Raise a support ticket section.

When "Raise a support ticket" is selected, a pop up window is shown where users will be able to see their username, email, location and the issue description text box where they can use to describe the issue they are facing. Once the ticket is submitted, it will be sent to the concierge email address "WILConcierge@gsa.gov" and it will be managed by the concierge team.

## Raise a support ticket ✕

**Name***

Mario Favalli Ragusini

**Email***

mario@place.technology

**Location**

GSA Central Office Workplace Innovation Lab (WIL) ▾

**Issue Description***

| Normal ⇕ | **B** *I* <u>U</u> 🔗 | ≔ ☰ | 𝑇ₓ |

*Issue Description*

*Completing this form will raise an incident in your support management platform*

**Submit**

The last icon is the search icon 🔍 used to search for spaces and users in the building.
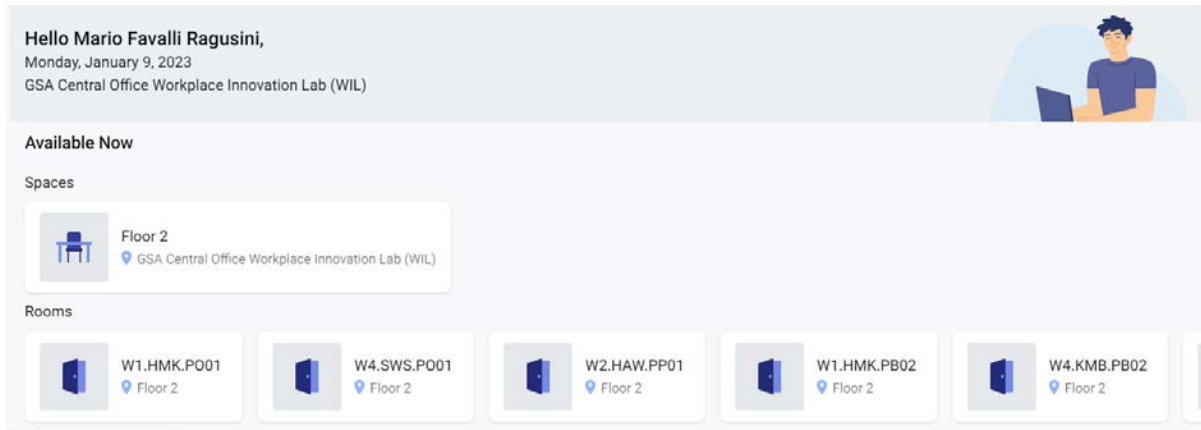
🔍 ryan

Ryan Booth — User

## Main Canvas

The main canvas is subdivided into three main subsections:

1. The first section shows an informative message to the user with their name, date and location. Following, the availability of spaces and floors in the building are shown to facilitate the selection process of available spaces to book rooms.



2. The second section contains the employee's bookings for the day if they have booked rooms and it lists all bookings sorted by hour. If "View All" is clicked, the user will open a more detailed list of bookings (see Your Bookings section)
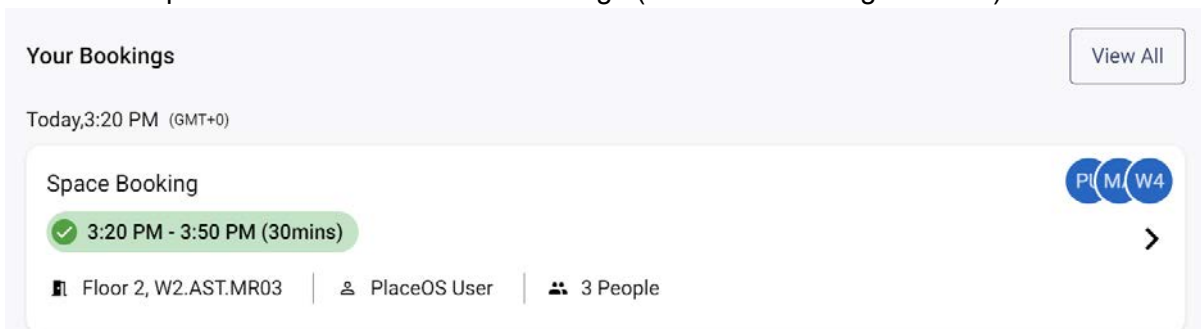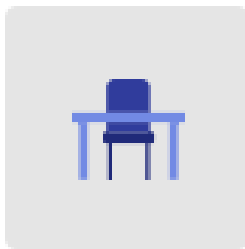


3. The third and last section allows users to add users and favorite spaces to create shortcuts for bookings. To add a favorite room or desk, please refer to the Room Booking section and Desk Booking section.

**GSA**

0 Resources

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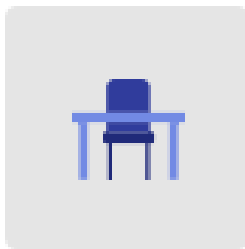**W1.GSA.WS02**    ···

📍 Floor 2
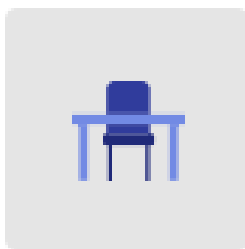
Book

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**W1.GSA.WS03**    ···

📍 Floor 2

Book

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**W1.GSA.WS04**    ···

📍 Floor 2

Book

# Room Booking

The room booking feature can be reached by clicking "Book Room" on the navigation bar

🚪

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The room booking process consists in filling out a form. All the fields with a * are mandatory. The form is composed by:

1) Details:
   a) Add Title: add a title for your meeting
   b) Date: select a date
   c) Start Time: select a time
   d) End Time: Select and end time which will define the duration of the booking
   NB: if an all day meeting is required, please tick the "All Day" box.



2) Attendees:
   a) Add attendee/s by typing their name in the box and select the user you want to add



   b) Add External: this will open a modal to fill out in case an attendee is a visitor to the building for the day

## Add External Attendee    ✕

**Name*:**

> Name

**Email*:**

> Email Address

**Organisation*:**

> Organisation

**Phone:**

> Phone

☐ Assistance required

☑ Visit expected

Cancel     Save

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3) Room:
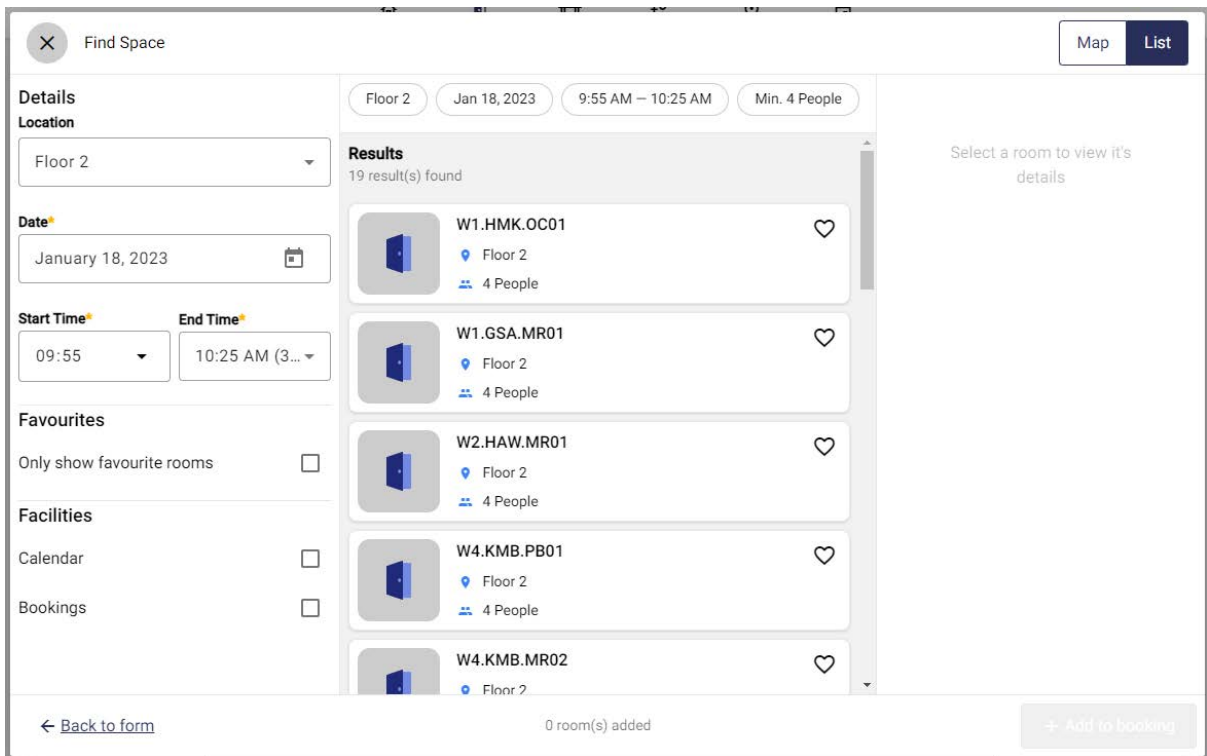   a) Select Room Size: users will need to select the room size they want to use (Min. 2 People, Min. 4 People, and Min. 10 People)

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③ Room       ⌃

**Select Room Size***

◯ Min. 2 People    ⦿ Min. 4 People    ◯ Min. 10 People

🔍 Add Space

b) Add Space: by clicking "Add Space", a modal will open where users can select the Level (floor) and/or edit information provided in the previous steps.

PlaceOS will then return the available rooms based on the information provided and it will display all the rooms in the Results section. Users will be able to select the room they prefer and PlaceOS will display further information such as details and the location of the room.

By clicking the "+ Add to booking" button, users will return to the form and the room will be added.



If users want to add the room to their favourites (see Landing Page - Main Canvas section), they can click the heart and this will be displayed in the landing page to speed up the booking process for the next times.

If users want to remove or change the room selected during the process listed above, they will need to click the two options "Change" or "Remove" in the room section



4) Notes:
      a) General Information for attendees: here organizers can add notes to the meeting details



When all required details are filled in, the user will click "Confirm Meeting". PlaceOS will book the room and display a confirmation message.

Users will receive two automated emails:
1) One email will contain more information about the event, how to get to the office and instructions on how to access the WiFi during their stay at the GSA's Workplace Innovation Lab.
2) The other email is an event email from the room that has been booked via PlaceOS app and this will be added to the users' calendar.
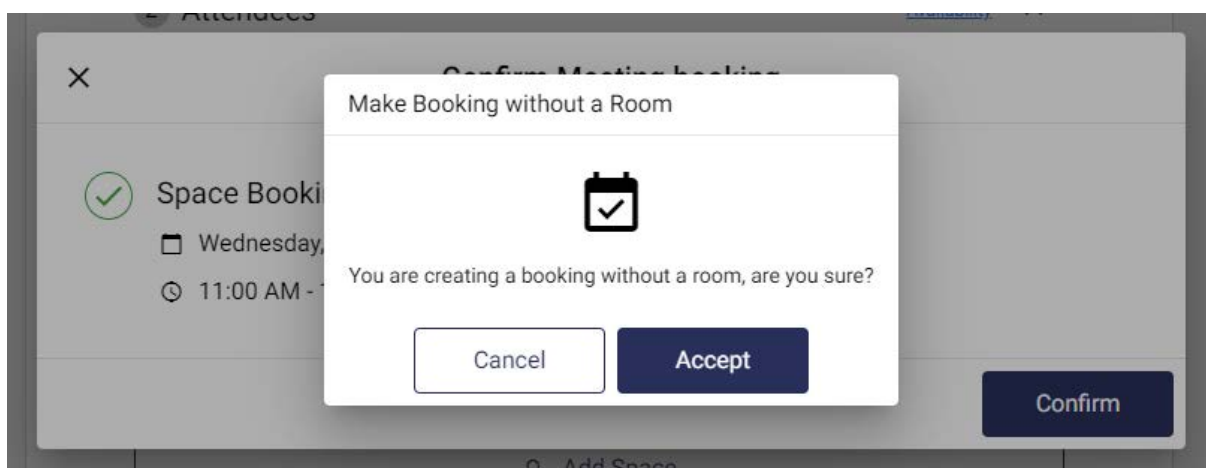
**Booking Confirmed!**



Your room booking for , W1.HMK.OC01 has been successfully booked for the Jan 18, 2023 at 9:55 AM-10:25 AM.

Great, thanks!

**NOTE: If a room is not added to the booking form, a warning message will be displayed to notify users that their booking is without a room.**

# Desk Booking

The desk booking feature can be reached by clicking "Book Desk" on the navigation bar

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The desk booking process consists in filling out a form. All the fields with a * are mandatory.

The first step consists in choosing if the booking is for a person or for a group

**Book Desk**

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👤 Single                    👥⁺ Group

After choosing the type of reservation, user will need to fill out the form which is composed by:

## Single Booking

1) Details:
   a) Add Title: add a title for your meeting
   b) Date: select a date
   c) Start Time: select a time
   d) End Time: Select and end time which will define the duration of the booking
   NB: if an all day booking is required, please tick the "All Day" box.

**1 Details**

**Add Title***

e.g. Focus Time

**Date***

January 18, 2023

**Start Time***

10:25
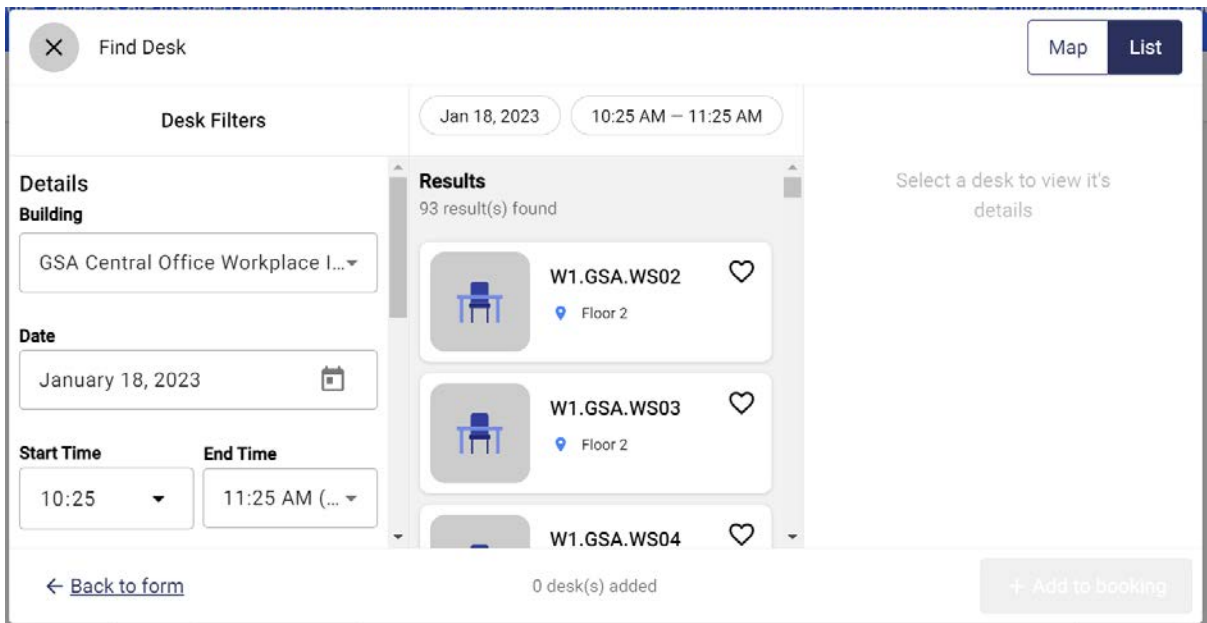
**End Time***                    ☐ All Day

11:25 AM (1 hour)

If a Single booking has been chosen, then the following step is
2) Desk:
   a) Add Desk: in this step, users will need to add a desk to their booking.

PlaceOS will then return the available desks based on the information provided and it will display all the desks in the Results section. Users will be able to select the desk they prefer and PlaceOS will display further information such as details and the location of the room.
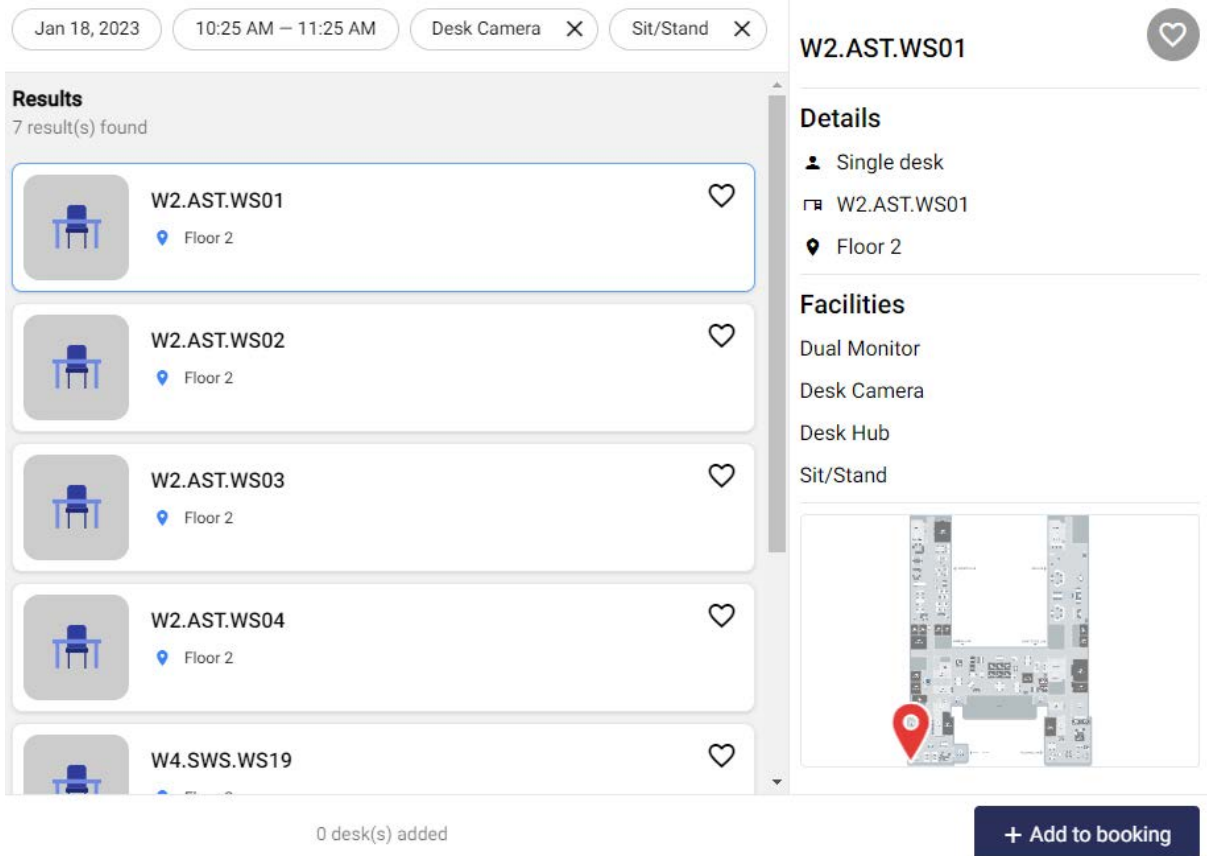


By scrolling down in the "Desk Filters" section of the modal, users can use "Type" to filter the type of desks required for the day such as Sit/Stand desk or a desk with Desk Camera.

## Type

| | |
|---|---|
| Desk | ☐ |
| Desk Camera | ✅ |
| Desk Hub | ☐ |
| Desk Mini | ☐ |
| Dual Monitor | ☐ |
| Sit/Stand | ✅ |

By clicking the "+ Add to booking" button, users will return to the form and the room will be added.

**② Desk**

W1.GSA.WS02
📍
👥 People

🖊 Change    ✕ Remove

🔍 Add Desk

If users want to remove or change the room selected during the process listed above, they will need to click the two options "Change" or "Remove" in the room section

🖊 Change    ✕ Remove

When all required details are filled in, the user will click "Confirm Desk". PlaceOS will book the desk and display a confirmation message.

## W1.GSA.WS02, Floor 2 Booked!

Your desk has been successfully booked for the Jan 19, 2023 at 10:40 AM-11:40 AM.

[ Add to Outlook ]

[ Add to Google Calendar ]

[ ⬇ Download iCal File ]

[ **Great, thanks!** ]

Users will receive an automated email with more information about the event, how to get to the office and instructions on how to access the WiFi during their stay at the GSA's Workplace Innovation Lab.

In the confirmation message shown above, users can also download the calendar event to add to their calendar to create reminders or simply to have the desk reservation saved in the calendar.

## Group Booking

The group booking process is very similar to the single booking process described above with an additional step which will allow users to invite group members to the reservation.

### ② Group Members

Mario ✕

Type a name or email

[ Add External ]   [ Upload CSV ]   [ CSV Template ]

**NOTE: If the form is not complete, the "Confirm Desk" button will be greyed out as shown in the image below.**

## Book Desk

👤 Single                    👥+ Group

### ① Details

**Add Title***

e.g. Focus Time

**Date***

January 18, 2023    📅

**Start Time***

11:00    ▼

**End Time***

12:00 PM (1 hour)    ▼

☐ **All Day**

### ② Desk

🔍 Add Desk

[ Confirm Desk ]

# Invite Visitor

Users can invite visitors without reserving a space by using the invite visitor form. This

feature can be reached by clicking "Invite Visitor" on the navigation bar ➕👤 .
The invite visitor process consists in filling out a form. All the fields with a * are mandatory.
The form consists in the following fields:

1) Date: select a date
2) Start Time: select a time
3) End Time: Select and end time which will define the duration of the visit
4) Visitor Name: type in the name of the visitor
5) Visitor Email: type in the email of the visitor which will be used to receive the automated email with information about the event
6) Company: the name of the company/organization visitors belong to
7) Reason for visit: type in the reason for their visit.

## Invite Visitor

**Date***

January 19, 2023

**Start Time***

11:00

**End Time***

12:00 PM (1 hour)

**Visitor Name***

mario

**Visitor Email***

mario@place.technology

**Company**

PlaceOS

**Reason for visit**

Catch up

**Send Visitor Invite**

Once the form is completed, users will click the "Send Visitor Invite" button to confirm the information provided and a confirmation message will be displayed as shown below.

# Visitor invite sent to W1.GSA.WS02



Invite has been sent to ███████████ to attend GSA Central Office Workplace Innovation Lab (WIL) from Jan 22, 2023 at 11:05 AM

Visitors will receive an email with the information about their visit on site and how to access the building and WiFi network

## Spaces

To see the interactive maps, users can click "Spaces" on the navigation bar with the

following icon 

Interactive maps will allow users to visualize the state of the space in real time and search for available spaces and desks.

Maps are color-coded which helps users to visualize the real time information of the space. The information displayed in interactive maps is as follow:
- Available spaces (Green = Available, Amber = Pending, Red=In Use)

Users will be able to interact with the map by hovering over rooms and desks to see information about the room of desks.

If users hover over a room, they will see information about the availability of the room as shown below
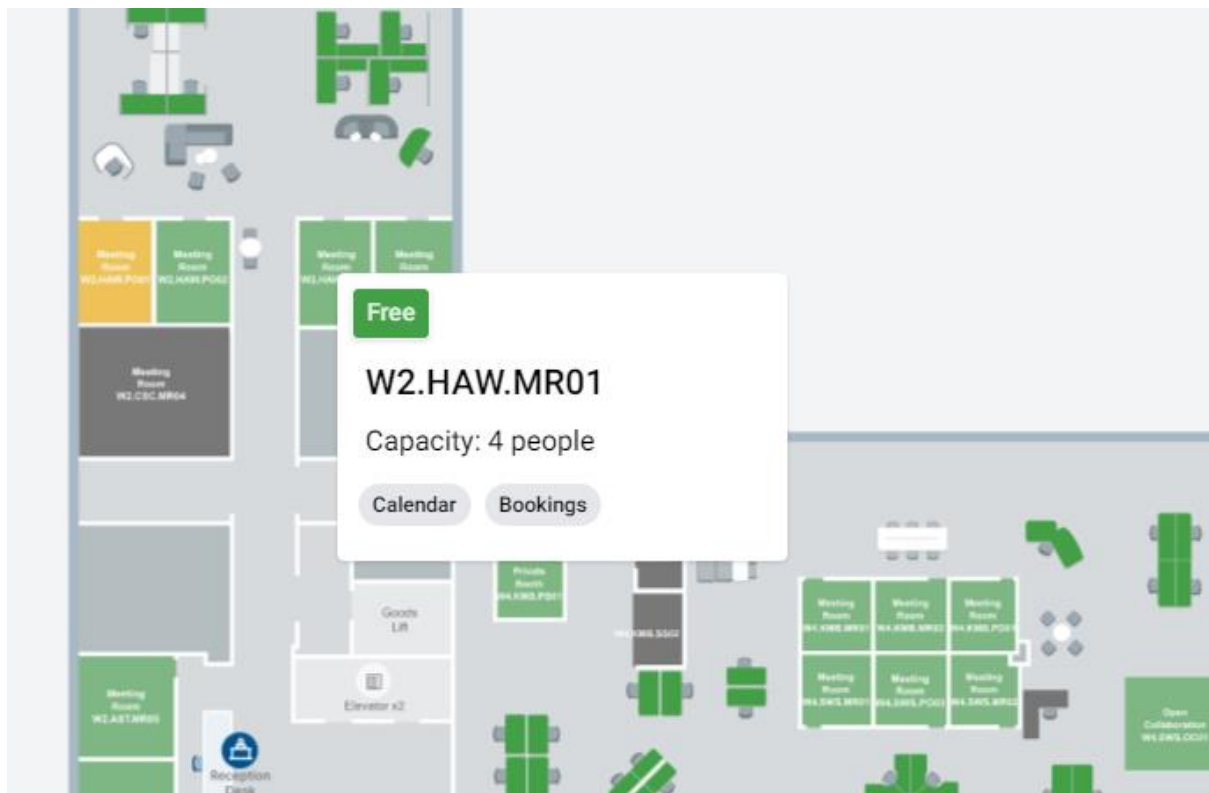


When users hover over a desk, if a desk is available (green), they will see only the name and they will be able to click on it to book it. If a desk is pending (amber) or in use (red), users will see information about the user who reserved the desk such as display name and the agency they belong to (information provided the first time users created an account).

W1.GSA.WS02

Jeremy West

General Services Administration
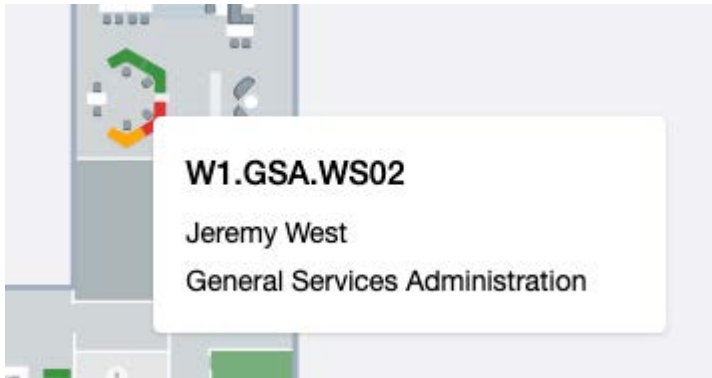
## Room Booking in Maps

If a room is available (green) users will be able to click on the room to create a "fast booking" which will book the room now - this information cannot be changed in the form - for the duration provided in the form (i.e. 30 minutes).



New Booking                                    ×

Title*:

Space Booking

Space:

W2.HAW.PO02

Date:                          Duration:
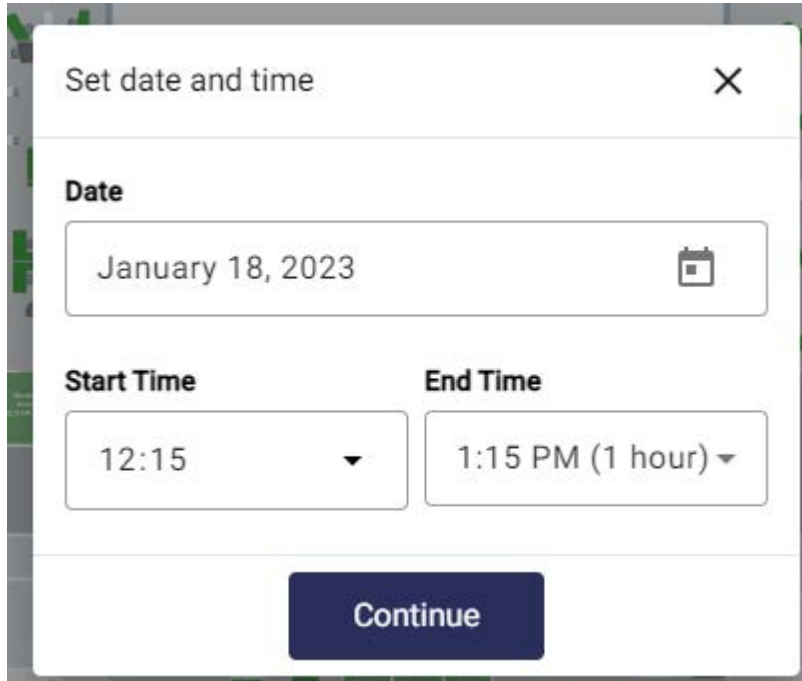
Jan 18, 2023, 11:55:00 AM      12:25 PM (30 minute... ▼

Save

Once the "Save" button is clicked, the room will be booked and users will see a confirmation email as shown in the Room Booking session. The room will change color and state - from available (green) to Pending (amber) until someone checks in into the room and the room will be In Use (red).
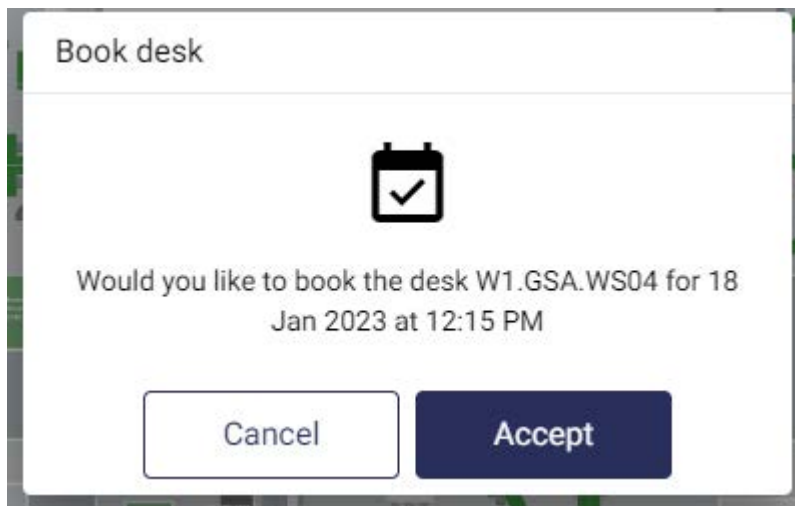
# Desk Booking in Maps

Similarly, if a desk is available (green) users can click on it and book it from the moment they click until the duration they choose.
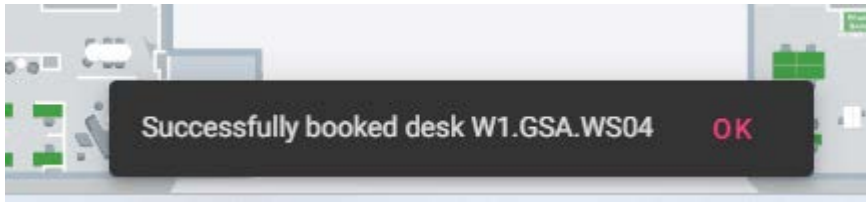


The application will ask to confirm



Once they confirm the booking, a successful message will be displayed and the desk will turn from green (available) to amber (pending) until someone checks in and it turns red (In Use).

# Your bookings

Users can see their booking history in the "Your Bookings" section. This feature can be reached from the navigation bar by clicking the calendar icon 
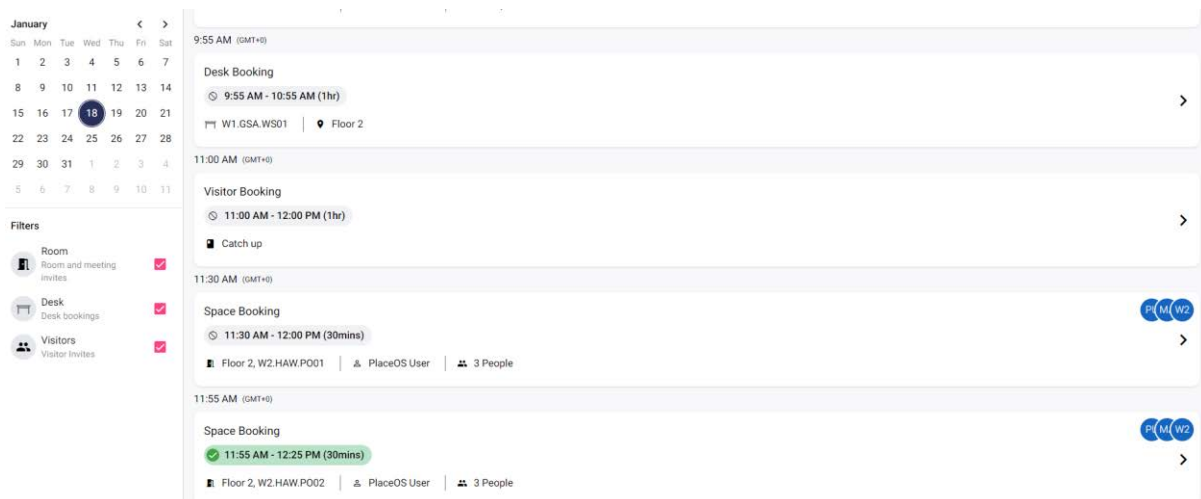


This page shows upcoming bookings for the user and the state for each of it (Tentative/Approved/Declined).
Users can use the calendar on the left side of the screen to change days of the week and always have an eye on their business day.
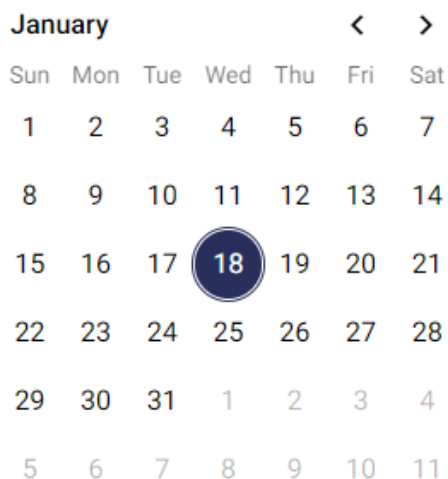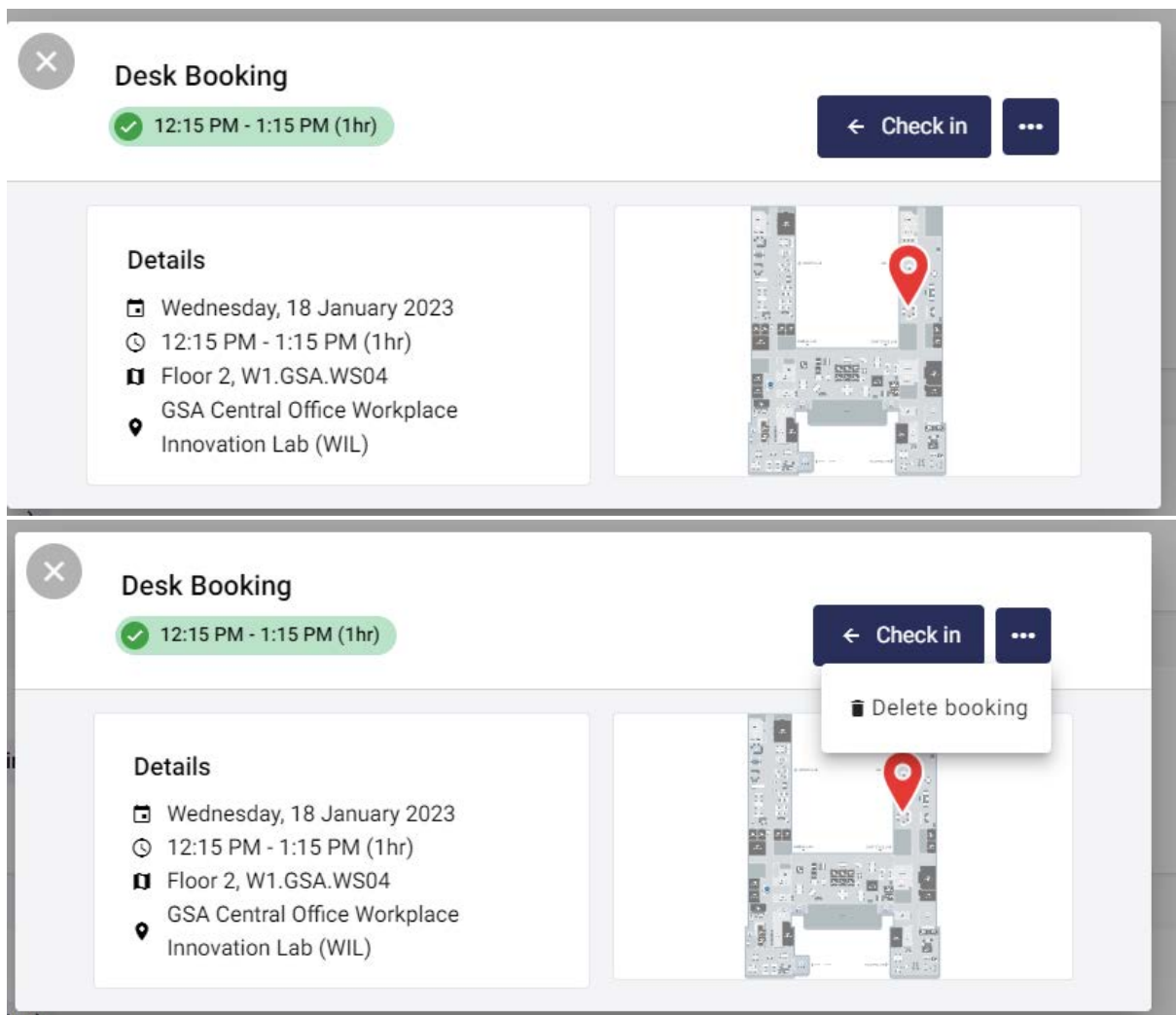


Users can also use filters to filter the type of events they want to visualized in the screen

## Filters

**Room**
Room and meeting invites  ✓

**Desk**
Desk bookings  ✓

**Visitors**
Visitor Invites  ✓

Users can click the booking to open and visualize more details and go through the check in process by clicking the "Check In" or delete the event by clicking the three dots on the top right corner of the modal and then clicking the "Delete booking" button.



**Desk Booking**

✓ 12:15 PM - 1:15 PM (1hr)          ← Check in   •••

**Details**

📅 Wednesday, 18 January 2023
🕐 12:15 PM - 1:15 PM (1hr)
📘 Floor 2, W1.GSA.WS04
📍 GSA Central Office Workplace Innovation Lab (WIL)



**Desk Booking**

✓ 12:15 PM - 1:15 PM (1hr)          ← Check in   •••

🗑 Delete booking

**Details**

📅 Wednesday, 18 January 2023
🕐 12:15 PM - 1:15 PM (1hr)
📘 Floor 2, W1.GSA.WS04
📍 GSA Central Office Workplace Innovation Lab (WIL)

# Feedback Survey

The survey will be sent at the end of each day to users who have booked a resource (room or desk) in the Workplace Innovation Lab (must have booked a desk or workstation).

The survey will be shared as a link in an email and users must click the link to open the survey. Users will rate their overall experience in the WIL and also the specific equipment they used during their booking.