Conf. Rm Tool Manual

WorkDo Tool Guide

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Ⓘ Tools (In Do Page)

WorkDo has many tools in the Do page of different levels within the workplace. This means workplace, groups and buddies all have a specific Do button and set of tools to use. Below is Table I-1 that shows which tools are available at which level.

Tools such as HR, Leave, Expenses and Approvals are set to activate once you created a workplace while other tools such as Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses and Approvals (depend on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Leave	●	x	x	HR
Leave Pro	●	x	x	HR
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shifts	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	

| Tool	Workplace	Group	Buddy	Dependency
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

Ⅱ Conference Room：Meeting Rooms Optimized

The Conference Room tool in WorkDo is our way of maximizing the use of the unoccupied rooms. The Conference Room tool provides real-time status for anyone who wishes to use the conference room and see which rooms are available and which ones are in use. This avoids unnecessary booking conflicts within the workplace which also optimizes the use of conference rooms.

Once the tool is activated, all you need to do is complete a series of simple setups and your team can start booking rooms for use immediately.

Ⅲ Set Up

In this section, we will guide you on how to use the Conference Room tool. The web interface is more comprehensive over the app interface, but you can choose your preferred device to set up Conf. Rm., this guide will only be focused on the web interface.
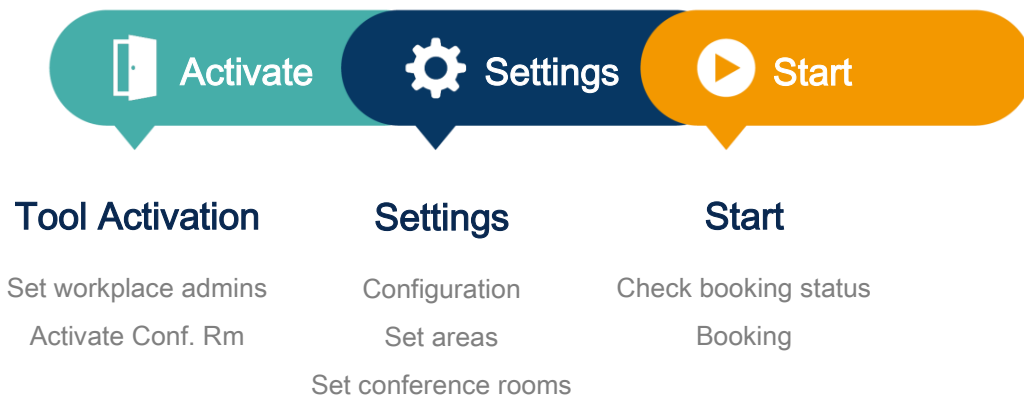
▲ Image III-1. Setup Process

STEP 1. Tool Activation

In order to ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins (Table Step 1-1).

Workplace admins include an owner and multiple admins that can adjust workplace settings and are usually management and IT employees. Tool Admins[1] manage the data others see per tool. Tool activation is done by workplace admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x

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[1]For more information on tool admin authorities, please see STEP 1-b Set Up Tool Roles.

Authority	Workplace Owner	Workplace Admin	Tool Admin
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b, Set Up Tool Roles, and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Ask the workplace admins to go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin, the red crown marks the owner and the blue crown marks the admin.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only menus.

b. Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are three types of roles, including No Role, Member and Tool Admin. Members are able to book rooms and check room status and tool admins could book rooms as well as configure related settings. Upon tool activation, the system will automatically assign all everyone as a Member; you will then have the workplace admins manually assign Tool Admin(s). If your tool authority is set to No Role, the Conf. Rm tool will not appear in your tool box.

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and the Advanced tab is available for you to activate, deactivate and manage tools.
4. Make sure the Conf. Rm is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2. Start

Through the use of the Conference Tool, team members can efficiently book and use conference rooms. The real-time booking status shows the occupancy of rooms that helps eliminate booking conflicts and enables the use of the rooms to their fullest!

Once you have activated this tool and established related settings, team members can swiftly book rooms for use.

a. Booking Configuration

Base on STEP 1-b Set Up Tool Roles, only the Tool Admin(s) should have the authorization to change the settings, if you are not unauthorized to do so, please use the method described in the section to change your tool role.

Following the steps described below and you could set room availability, book rooms, and even book rooms at regular intervals. When the initial settings are completed, these settings will be applied to other rooms unless specified. Should certain rooms need different settings, you could follow the steps in Set Conference Rooms to modify the room settings.

1. Have the tool admin click Conf. Rm in the Do page.
2. Click the Booking Configuration on the left of the menu.
3. Fill out the fields (* must be filled).
   - Available Time (Start) / (End): Booking is allowed within the set time frame.
   - The Max Days ahead of Booking: Maximum days allowed to book room in advance.
   - The Max Days of Future Booking: Maximum days allowed for regularly held meetings. Maximum at 365 days.
4. Click Save to complete the setting.

b. Set Conference Room Areas

Conference rooms can be located on different floors and different buildings, you could reflect this through the Area Maintenance function. If you feel this is not needed, you could bypass this setting altogether.

Area Maintenance

1. Have the tool admin click Conf. Rm in the Do page.
2. Click Area Maintenance on the left of the menu.
3. Click +Create and fill out the fields (* must be filled).
   - Area Name
   - Remark
   - Status: Default is set to Enabled.
4. Click Save to complete the setting.

c. Set Conference Rooms

Set the Room Type, Capacity and availability, etc.

Conference Room Maintenance

1. Have the tool admin click Conf. Rm in the Do page.
2. Click Conference Room Maintenance on the left of the menu.
3. Click +Create and fill out the fields (* must be filled).
   - Area, Capacity, Room Type and Public Room are for reference only.
   - Name
   - Status: Default is set to Enabled
   - Remark: Available equipment, terms of use, etc.
   - Start Time/End Time: Default time is set according to the Booking Configuration, actual time of availablity could set here.
4. Click Save to complete the setting.

More tutorials coming soon.