



## Onboarding Checklist

### Initial Setup Decisions

Use the following list to ensure you have made decisions before you commence onboarding.

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
1.	Employee Data			
1.1	<p><b>Q. Do you want to set up an SFTP transfer to update your employee data?</b></p> <p>SpacelQ supports several integration options to automate the data import process and enable employee access to SpacelQ features. One common method used to import employee data is SFTP (Secure File Transfer Protocol). The process allows you to connect to a SpacelQ-hosted SFTP server and save a file containing relevant information. SpacelQ will automatically pick up the file and load it into your system.</p>			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
1.2	<p><b>Q. Will you upload your employee data before you set up your buildings?</b></p> <p>We recommend that you upload your employee data first as the order that the initial data is loaded will affect the relationship between the employees and the building they will be located in.</p> <p>The location relationship is defined in the Employee data's Location column and this will populate the Building's HR Location drop-down. This relationship will save you a lot of time when it comes to seating your employees.</p> <p>For more explanation, see Building and Employee Location Relationship</p>			
2.	<b>Buildings and Floors</b>			
2.1	<p><b>Q. How many buildings and floors do you want to initially set up?</b></p> <p>If you have many buildings and floors to set up this can be completed via an import or if you a few to set up then you can complete this manually.</p>			
2.1	<p><b>Q. How do want to manage your floorplan(s)?</b></p> <p>Your floorplans can be upload as PNG, PDF or CAD.</p> <p>For more details, read the <a href="#">Floorplan Preparation article</a> on the Help Center.</p>			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
2.	Floor Maps			
2.1	<p><b>Q. Do you know your seat numbering?</b></p> <p>If you have existing unique seat numbering and meeting room names, then you can set this up quickly. If you don't have unique seat numbering that's fine, we have a recommended way to number seats.</p> <p>For more details, read the <a href="#">Floorplan Preparation article</a> on the Help Center.</p>			
3.	Allocation and Occupancy			
3.1	<p><b>Q. Do you know your seating charts?</b></p> <p>Your office seating for employees may be:</p> <ul style="list-style-type: none"> <li>• <b>In-Office</b> - where employees work in-office either in fixed seats (assigned seats), flexible seats, or neighborhoods</li> <li>• <b>Remote First</b> - where employees work remotely but may be able to work or gather in an office</li> <li>• <b>Hybrid</b> - where employees spend half their time remotely and half in-office</li> </ul> <p>When your employees are working in-office you may want your seating charts to be similar to pre-pandemic setup using the fixed seats, flexible seats, or neighborhoods. Or you may want to set up your seating charts so that your employees must book hoteling desks before they come into the office.</p>			

## Additional Setup Decisions

Use the following list to ensure you have made decisions about the additional configuration items.

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
1.	Leases			
1.1	<b>Q. Do you want to include Lease information?</b>  Including your building leases in your SpaceIQ account helps you create a richer data set for your real estate portfolio. Leases can be associated with any building or floor already in your SpaceIQ portfolio. In addition, lease costs and schedules are incorporated into SpaceIQ financial reporting, found in Reports, Portfolio, and Costs.			
2.	Building Types			
2.1	<b>Q. Do you need additional building types?</b>  By default, there are standard building types that you can use to define your buildings. If you need additional building types and your Admin can set these up.			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
3.	<b>Space Types</b>			
3.1	<b>Q. Do you need additional space types?</b>  Space types define the space and there are three categories of space types: Personal, Common, and Custom. There are many default types, for example, Work space, Office, or Cubicle. Your Admin can create custom space types and if needed, they can hide default space types.			
4.	<b>COVID Compliance</b>			
4.1	<b>Q. Do you want to setup Booking Capacity Limits?</b>  To assist with your region's COVID-19 restrictions your business can limit the number of people visiting a building by setting a capacity limit. This can be set for all building locations or set for particular building locations.  The capacity restriction is set by the percentage of hotel desks that can be booked on a floor.			
4.2	<b>Q. Do you want to use Safe Distancing?</b>  Manually set up the safe distancing around each space on your floor map. This is to ensure your employees maintain a recommended safe distancing spacing for health purposes. Before you start, check what is the safe distancing requirement from your local authority.			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
4.3	<p><b>Q. Do you want your employees to complete Health Screenings?</b></p> <p>When your business needs to ensure that employees are healthy before coming into the office, you can use SpaceIQ's Health Screening so your employees can confirm that they are symptom-free well before check-in time.</p> <p>Note: When the Health Screening is enabled, then your Admins will receive Health Screening notifications when an employee fails to complete a health check. If an Admin does not want to receive the notifications, then they can turn the Health Check Notifications setting off, in their User Settings.</p>			
5.	<b>Desk Bookings &amp; Check-in Times</b>			
5.1	<p><b>Q. Do you want all-day desk bookings or time blocked bookings?</b></p> <p>If your business wants your employees to make all-day desk bookings this can be set up OR if you would prefer time block bookings which allow your employee to choose time OR allow both hourly and all-day bookings.</p>			
5.2	<p><b>Q. Do you want your employees to check in to their desk bookings?</b></p> <p>When the required check-in setting is on then employees must check into their desk booking. Additionally, your business can use the auto-release booked desk for when an employee doesn't check into their desk booking and you can exempt specific employees from checking in.</p>			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
5.3	<b>Q. Do you want to limit the number of concurrent bookings?</b>  Your Admin can allow employees to book multiple desks at one time or limit them to booking only one desk at a time.			
5.4	<b>Q. Do you want your employees to make recurring desk bookings?</b>  If your business wants your employee to make recurring desk booking this can be set up.			
5.5	<b>Q. Do you want to automatically release hoteling desks?</b>  When an employee doesn't check into their desk booking, the booking can be canceled and the hoteling desk is freed up for another employee to book.  By default, this is set to cancel the desk booking after 2 hours of the booking's start time. Your Admin can set the time for when the desk booking will be automatically canceled.			
5.6	<b>Q. Do you want your employees to be able to cancel their desk booking after they have checked-in?</b>  Your Admin can allow employees to cancel their desk booking after they have checked-in			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
6.	<b>Desk Reservation &amp; Available Desk Visibility</b>			
6.1	<b>Q. Do you want your employee's names to display on the reserved desks?</b> When looking for an available desk on the floor map, employees may like to know who has already booked desks near the available ones.			
6.1	<b>Q. Do you want your employees to be able to find coworker's desk bookings?</b> If your employees are working together, then you can let them find their coworkers desk bookings. Then they can make a desk booking next to (or near) them.			
7.	<b>Desk Bookings &amp; Limit Future Hotel Desk Bookings</b>			
7.1	<b>Q. Do you want to limit how far in the future your employees can book desks?</b> By default, your employees can reserve hotel desks for up to 6 months in the future. Your Admin can limit in days, weeks, or months, how far into the future an employee can make a hotel desk booking.			



SpaceIQ Checklist

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
8.	<b>Desk Bookings &amp; Book on behalf of Another</b>			
8.1	<b>Q. Do you have employees that need to make bookings on behalf of another person?</b>  Only Admins can manage Desk Bookings on behalf of Departments and Workplace Groups. If needed, your Admin can make individual desk bookings or bulk import desk bookings. Also, your Admin can cancel desk bookings.			
9.	<b>Find Hoteling Desks using an Asset filter</b>			
9.1	<b>Q. Do you want your employee to find hoteling desk using the assets filter in the SpaceIQ Mobile app?</b>  The Assets filter in the SpaceIQ Mobile app lets your employees quickly find hotel desks that matches their needs. For example, find a book with an ergo chair, sit-to-stand desk, or dual monitors.			

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
10.	Employee Photos			
10.1	<p><b>Q. Do you want to upload employee photos to SpaceIQ?</b></p> <p>Employees can upload a photo to their profile in the SpaceIQ Mobile App, see Update your Profile.</p> <p>Note: If you have your employee photos in Google Drive then you can use the Photo Importer to integrate with Google Drive, see Employee Photo Import using Google Drive.</p>			
11.	Desk Photos			
11.1	<p><b>Q. Do you want photos upload of your meeting rooms?</b></p> <p>Your Admin can upload a photo to the Desk details screen in the SpaceIQ Mobile App, see Upload a Desk Photo.</p>			
12.	Space Reservations Integration			
12.1	<p><b>Q. Do you want your employees to be able to book meeting rooms?</b></p> <p>If you want your employees to book meeting rooms then the Calendar integration needs to be complete, and the meeting room set up on the Floor Map.</p>			

SpaceIQ Checklist

No.	Item	Business Requirement (Yes/No)	Business / IT Owner	Status
13.	<b>Ticketing Integration</b>			
13.1	<b>Q. Do you want your employees to be able to create maintenance tickets?</b> You can either complete a Ticketing integration for your employees to create maintenance tickets to a third-party Ticketing system or set up the Email (Ticketing) integration so that your employees can submit maintenance tickets directly from the SpaceIQ Mobile app.			
14.	<b>Badge or Sensors Integration</b>			
14.1	<b>Q. Does your office use badge systems and/or sensors?</b> If your business uses Badge systems, then this can be uploaded to SpaceIQ to give your business insight into the attendance of a building. Also, if your business uses Sensors to identify space usage then this can be uploaded into SpaceIQ to give you insights into the usage of spaces such as desks and meeting rooms.			
15.	<b>Kiosk Touchscreen Integration</b>			
15.1	<b>Q. Do you want to set up Kiosk Touchscreen in your office?</b> SpaceIQ can be set up to run on an interactive Kiosks Touchscreen and employees can use it to help them find employees and meeting rooms.			