

Your first two weeks

Creditsafe had over 100 people on intheOffice in two days, and 72% of the office on it within two weeks. The times below are a guide to each step; yours will depend on how many people and offices you are setting up.

Before you start the champion, 5 minutes (estimate)

1. Decide who the admin is. One person sets the office up; everyone else only sets their own days.
2. Pick a go-live day within the next ten working days and write it down. It is the day the schedule becomes how the office knows who is in.
3. Get your IT contact's name. They have one five-minute job on day one.

If you would rather not do it alone, book a setup call and we do everything below with you in an hour.

Day 1, morning the admin, 20 to 40 minutes (estimate)

1. Create the account with your work email or your Microsoft sign-in. One account per company: if a colleague has already signed up, ask them to invite you.
2. Name your location and set its capacity, the number of people who can be in on a day. Add a second location if you have one.
3. Add your people. From Microsoft 365, about five minutes. From a spreadsheet with the headers firstname, lastname and email, about ten minutes. One at a time by email if you prefer.
4. If you use Microsoft, switch on "Allow self sign up" under Single Sign On Rules in Settings, so that anyone with your email domain can sign themselves in without waiting to be added.
5. Switch on the modules you want to try: Desk & Space Booking, Visitor Management, Advanced Scheduling. The 7-day trial starts when the first module is switched on, not at signup.

Day 1, afternoon IT, 5 minutes (estimate)

The whole of IT's job, and it can be done while the admin is still adding people.

1. Allow the invitation sender, hi@intheoffice.io, through your mail filter.
2. If you want the people list synced from Microsoft 365, a tenant admin grants consent for the directory-read permission the sync asks for. Signing in with Microsoft needs nothing beyond the basic profile.

Nothing is installed and there is no server to provision.

Day 2 the admin, 10 minutes (estimate)

1. Send the announcement. There is a draft below: what it is, why you are doing it, what each person has to do, and the go-live day.
2. People receive their invitation from hi@intheoffice.io, set a password or sign in with Microsoft instead, and set their first week.
3. Setting a week takes about two minutes, and that is the whole job for everyone who is not the admin.

Days 3 to 5 the admin, 5 minutes a day (estimate)

1. Watch the Schedule fill up.
2. Nudge the people who have not set a week yet.
3. Set your own week where everyone can see it. People copy the admin.

Go-live day, day 5 to day 8 everyone

1. Everyone who is coming in has said so, and the week ahead is on one screen. That is what running looks like.
2. From today, the schedule is how the office answers "who is in on Thursday?", not the group chat.

Week 2 the admin, 30 to 60 minutes (estimate)

1. If a module is not switched on yet, switch it on now.
2. Add your desks, meeting rooms, parking spaces and lockers as spaces. About a minute a space, so a floor of forty desks is under an hour, and the space plan puts them where they really are.
3. Announce it in the same thread as the first message, so people know a desk is now bookable.
4. Check the Subscription tab in Settings: it shows what is left of your trial and the running total for the people on your account.

The announcement, to send on day 2

Fill these in at www.intheoffice.io/getting-started/ and copy the result, or by hand here.

Hi everyone,

From [go-live day] we are using intheOffice to say which days we are working in the office, at home or away, so the people who need to work together are in on the same day, and so nobody comes in to find there is nowhere to sit.

What you need to do, once, this week:

1. Look for an invitation from hi@intheoffice.io. Open it and set a password, or sign in with your [company] Microsoft account instead.
2. Set your days for this week and next. It takes about two minutes.
3. Change a day whenever your plans change. Nobody is asking you to commit to a year.

That is the whole job. [Name] is our admin, so ask [name] if anything looks wrong, or reply to this email.

Thanks,
[Name]

End of week 2. Done looks like this.

- Everyone is invited.
- Four in five people have set at least one week.
- The module you switched on is still on, and someone other than the admin has used it.
- The running total on the Subscription tab is a number you expected.

If any of those is not true at the end of week two, book the setup call and we finish it with you.