NexGen Virtual Office Administrator Manual

This manual will assist you with Configuring and Managing your NexGen Virtual Office

NexGen Virtual Office Administrator Manual v1.7

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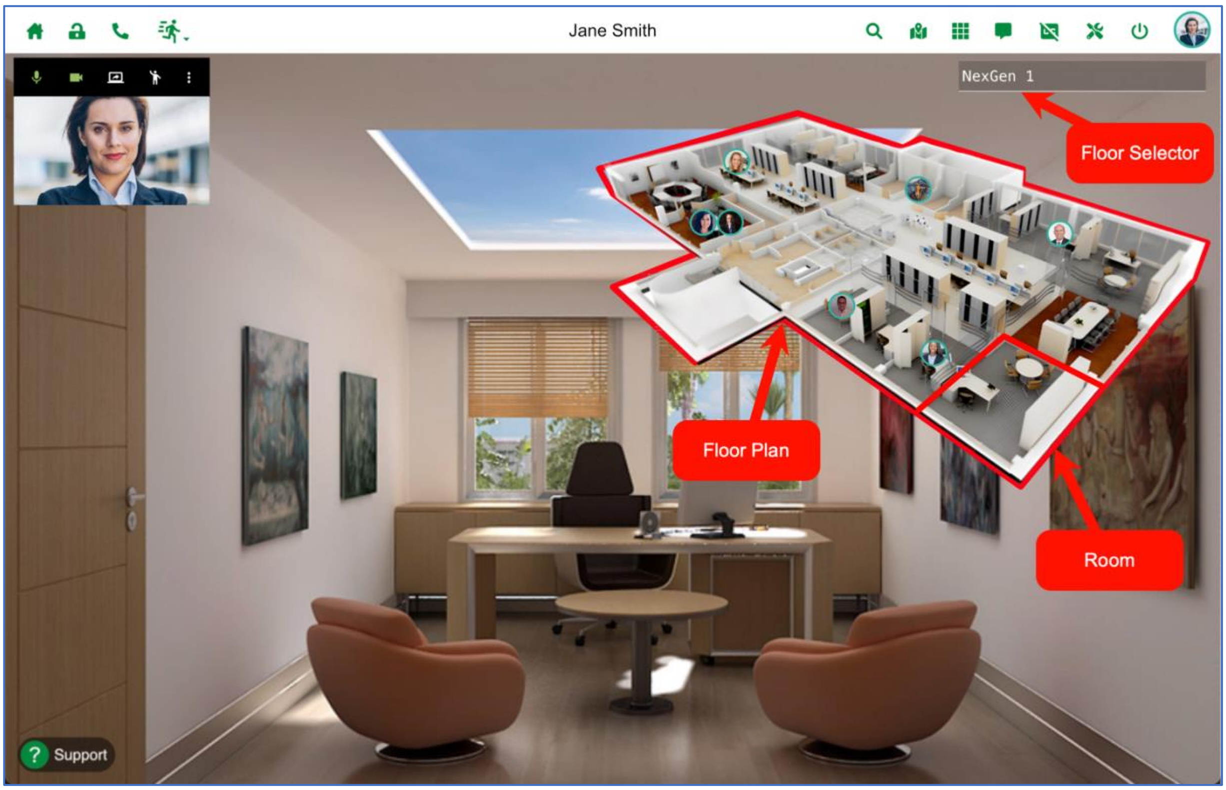
Introduction

Welcome to NexGen Virtual Office. This guide will help you understand key platform concepts so that you can configure your environment to best suite your needs. We will then dive into the configuration process so you can be up and running in no time.

NexGen Virtual Office Key Concepts



To illustrate the concepts of mapping a real environment to a virtual environment, we will assume the role of Ironman (Tony Stark) as a NexGen Virtual Office (NVO) customer designing his platform to mimic his brick-and-mortar operation. Tony's business includes a headquarters, an operations building, and a manufacturing facility for his weapons division.

Floor

The definition of a floor in NVO is a floorplan that represents a single floor that shares a common purpose. A floor is defined by giving it a name and by assigning one of the pre-defined floorplans in the configuration wizard. In Tony's case, he wants to have three different floors. One for his executives, one for operations and one for manufacturing.

To implement this design, he will need to configure three (3) floors:

1. StarkInd – HQ
2. StarkInd – Operations
3. StarkInd – Manufacturing

Floor restrictions: a floor can only have one attached floorplan and its name must be unique within the NexGen Virtual Office platform. This means that if customer **A** configures a floor named **Sales**, no other customer can configure a **Sales** floor.

Best practice: If your design calls for having multiple floors, always prefix your company's initials to your floor definition. (See example above). This approach will make your floor names unique within the system and will prevent name collisions. When naming your floor, the system will alert you if the name you choose for your floor is already taken.

We have pre-defined floorplans from small 10 office layouts to over 100 rooms.

Users can have access to a single floor or multiple floors within the same company. In Tony's case, he wants access to all floors as well as his assistant, Pepper Potts.

Room Types

There are two main types of rooms in a floorplan: **Offices** and **Special Purpose Rooms**. The difference between these types is that an **Office** is owned by a user, **Special Purpose Rooms** are not owned by anyone, instead, they are a shared resource. Offices have additional capabilities like locking a door, sending notifications to its owner, etc.

Special purpose rooms include:

- Break Rooms
- Cube and Study Carrels
- Lobbies
- Meeting Rooms
- Training Rooms & Classrooms

Room

Both room types will have a name that will be displayed in the floorplan when someone hovers over it and a background image that will be displayed when someone enters the room.

You can designate any room in the floorplan to be an office or any of the special purpose room types regardless of the appearance of the image in the floorplan. In other words, if a floorplan image shows a big corporate meeting room with a 20-seat conference table, it does not mean it can only be designated as a conference room. It could also be used as an office or any other room type.

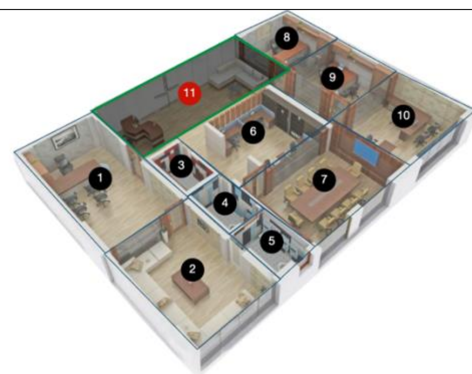
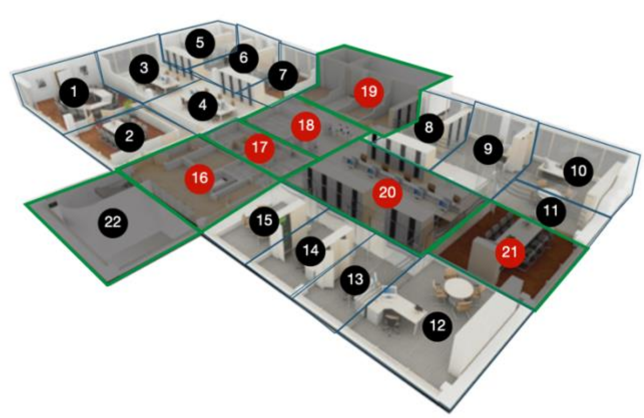
Users

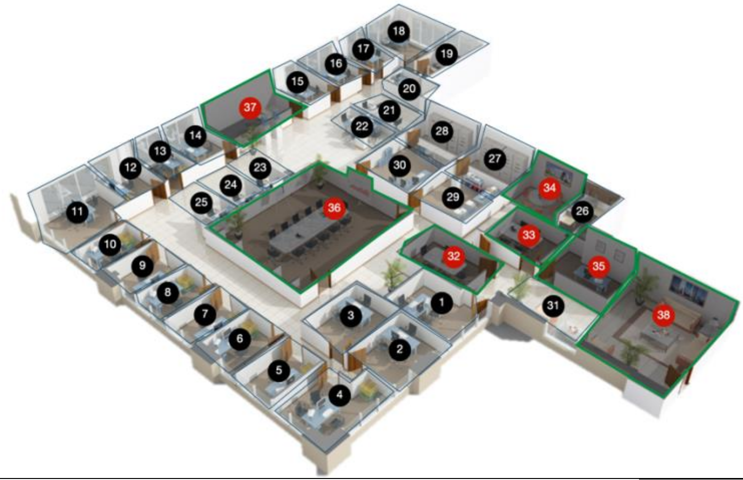
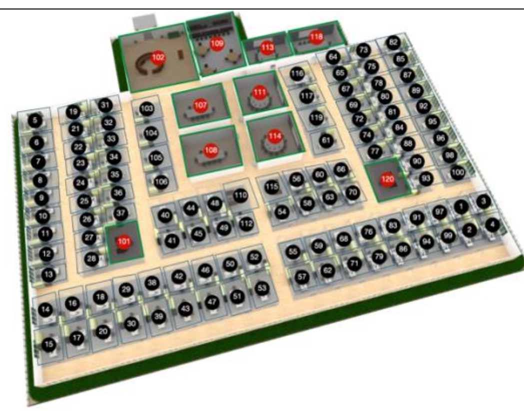
There are two types of users: **regular users** and **admin users**. Admin users can edit/move/lock/delete user accounts and perform all the administrative tasks for managing the rooms and the floors for that account.

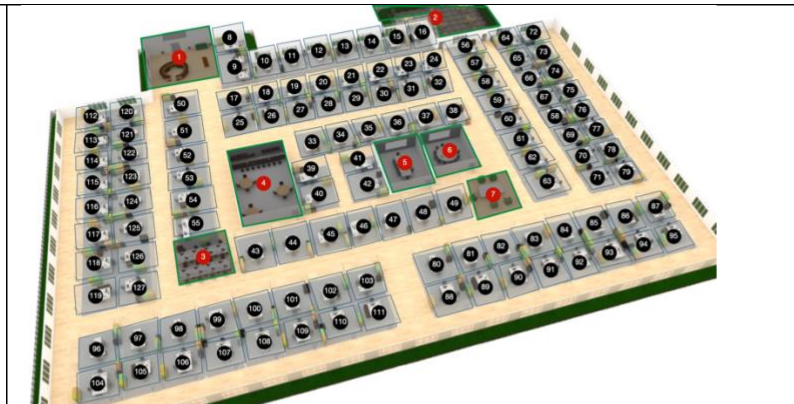
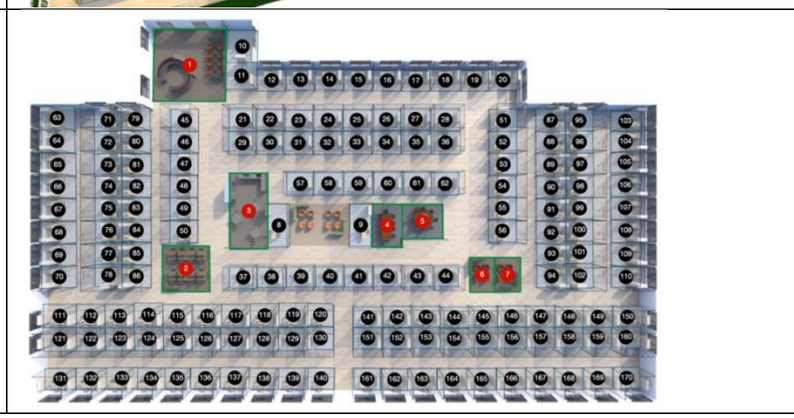
Floorplans

During the planning phase of your virtual office implementation, the administrator can choose from several pre-defined floor plan designs based on the number of users required by the organization. These plans range from a small 11-room office up to a 170-room office.

We can also help you design a custom floor plan which will require contracting a third-party graphic design vendor to render your design in a 3d perspective. The costs of these services vary depending on the complexity of the design and are billable on a per hour basis.

11 - Room Office	
22 - Room Office	

37 - Room Office	
63 - Room Office	
120 - Room Office	

127 - Room Office	
170 - Room Office	

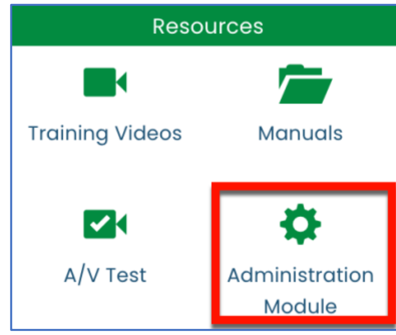
Note: The pre-defined floor plans show the room numbers as a reference for the administrator to assign users to room locations. This is especially helpful if you will be automating your floor creation process via uploading a CSV file.

These reference numbers are color coded based on room types. Offices have a black numbered circle and special purpose rooms have a red numbered circle.

These templates are a starting point for the administrator and the special purpose room designation are not mandatory. In other words, just because a room has been defined in the template as meeting room does not mean it cannot be configured as a regular office.

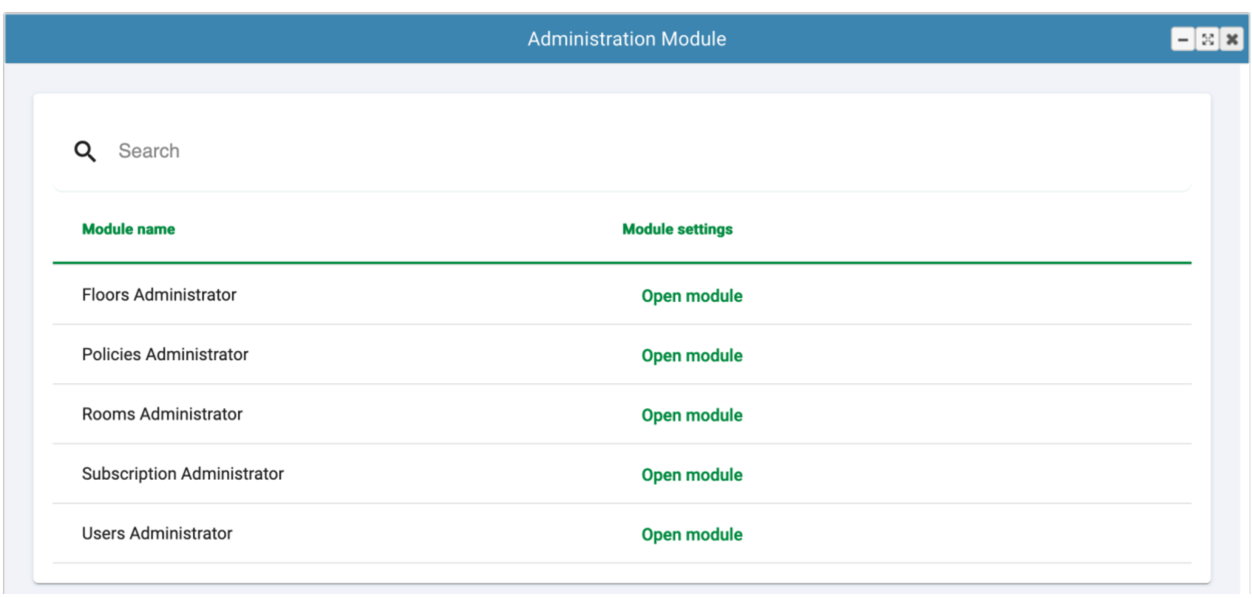
To change a special purpose room to an office, simple go to the **Room Administrator** app, select the room and change the room type to office.

Virtual Office Administration Module



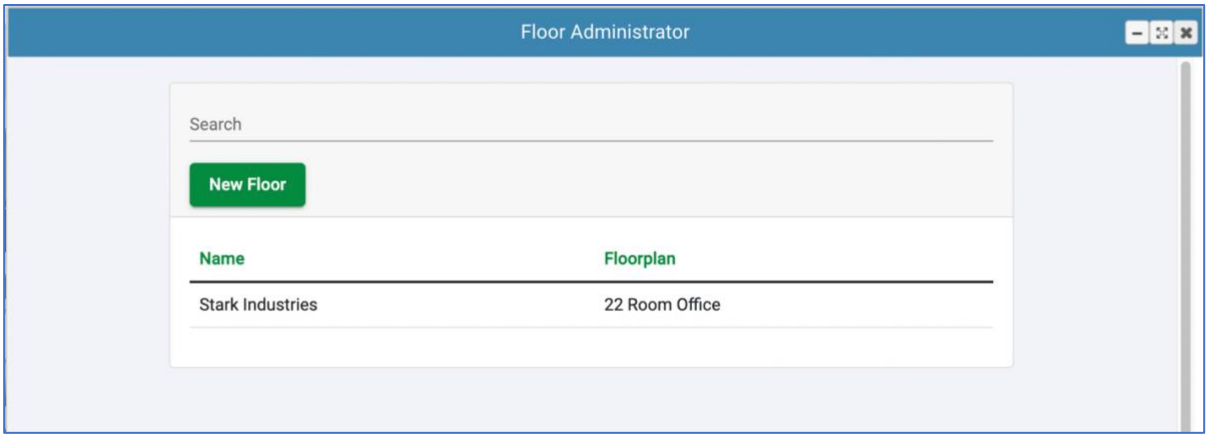
As an administrator, you will have access to tools that will allow you to configure your Virtual Office environment. These tools are available under the **Business Tools** tool bar icon in the **Resources** section and include:

- **Floor Administrator**
  The Floor Administrator application allows you to add, update and delete floors.
- **Rooms Administrator**
  The Room Administrator application allows you to assign, update and clear users assigned to rooms.
- **User Administrator**
  The User Administrator application allows you to add, update and delete users.
- **Policies Administrator**
  The Policies Administrator application allows you to define default operational policies for all your users.
- **Subscription Administrator**
  The Subscription Administrator application allows you to adjust the number of licensed users in your subscription. It also allows you to change the billing and payment information.

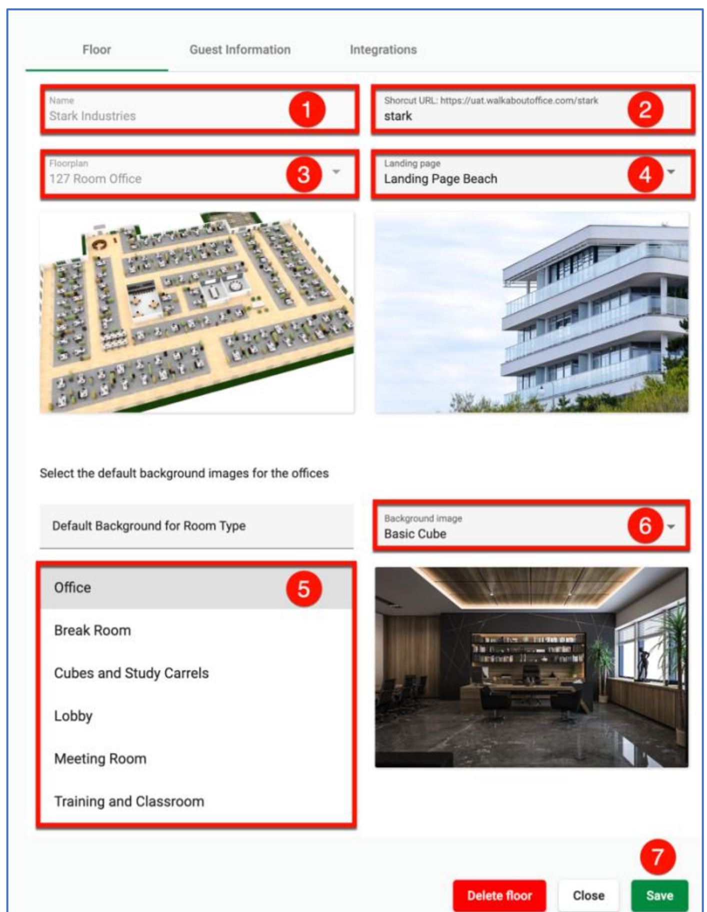


Floors Administrator

The Floor Administrator application allows you to add, update and delete floors.



Add a New Floor

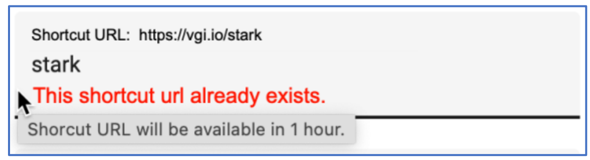


To add a floor, open the **Floor Administrator** app from the **Administration Module** and click the **New Floor** button. The system will display the floor details in a new window.

1. Enter the **Floor Name**.
2. Enter your **Shortcut URL**.
3. Select a **Floorplan** from the dropdown list.
4. Select a **Landing Page** image from the dropdown list.
5. Select each room type,
6. And select the default background image.
7. Click the **Save** button.

The **Shortcut URL** provides a custom landing page for your users. This allows the administrator to select a landing page image instead of the default NexGen landing page. To access this custom page, have your users type the selected URL you have configured in this field. In the example above, instead of going to https://vgi.io, you can go to https://vgi.io/stark and your users would see the login page with the **Landing Page Beach** image in the background.

Note: If you hover the field, you will get a tool tip notifying you that it can take up to 1 hour for your configuration changes to take effect. It will also alert you if the selected URL is already in use. In this case, you will need to select a different URL.

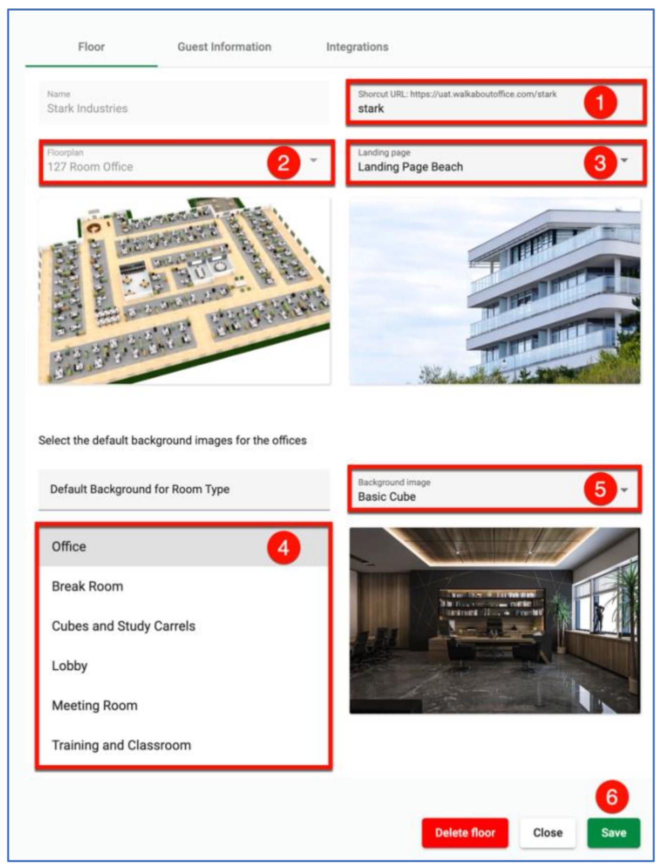


Edit Floor

To edit a floor, open the **Floor Administrator** app from the **Administration Module** and select the desired floor to edit from the list. The system will display the floor details in a new window. Once the floor has been created, you can no longer change the **Floor Name** or the **Floorplan**. These options will show as grayed out in the form and will be locked.

1. Enter your **Shortcut URL**.
2. Select a **Floorplan** from the dropdown list.
3. Select a **Landing Page** image from the dropdown list.
4. Select each room type,
5. And select the default background image.
6. Click the **Save** button.

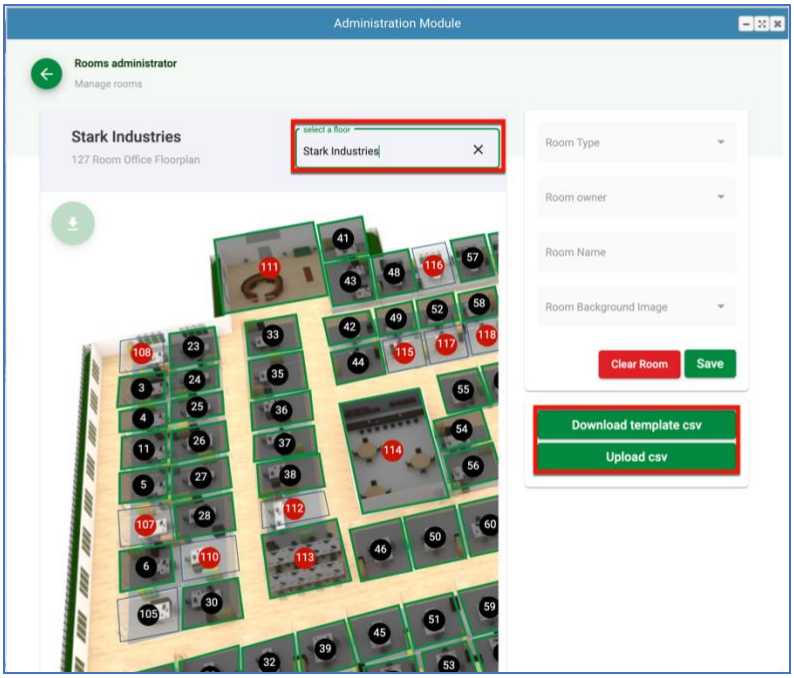
Click the **Delete floor** button to remove a floor.



Change Floor Plan

Note: If you need to make changes your floorplan or floor name, please follow these steps:

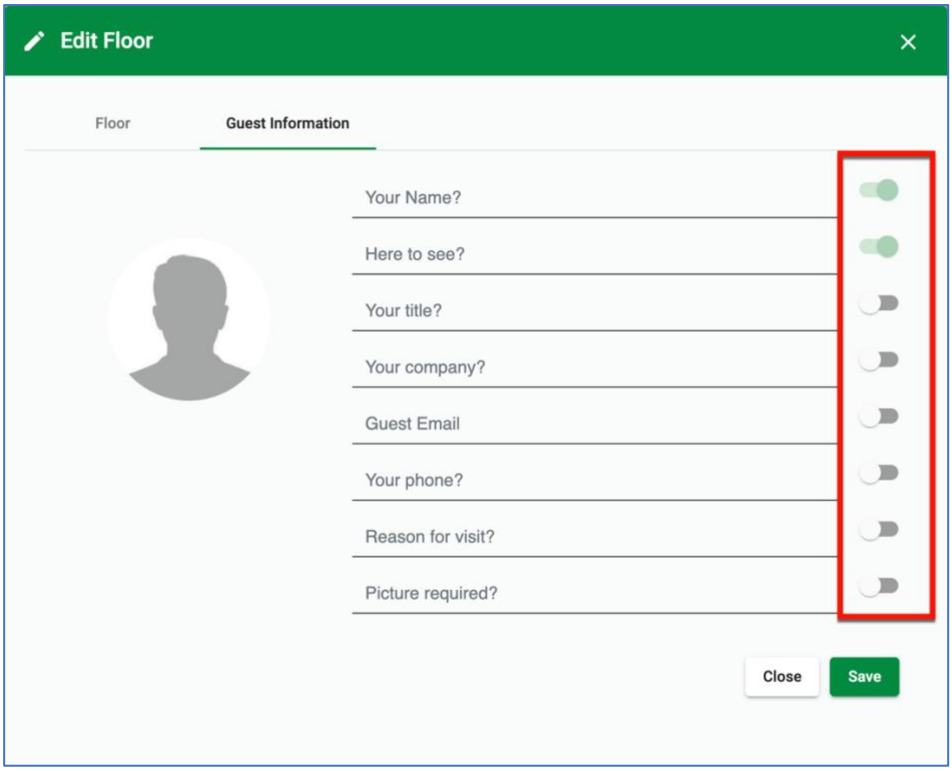
Warning: Not following this process correctly can result in your floor being unusable.



1. Create a new floor with the desired name and floor plan with the **Floor Administrator** app.
2. Using the **Room Administrator** App, select the old floor plan from the list and click the **Download template csv** button. This will create a complete download of all your user accounts so you can upload them in your new map.
3. If necessary, edit your CSV file to place your users in specific rooms.
4. Select the new floor from the dropdown list.
5. Click the **Upload csv** button to move all your accounts from the old map to the new map.
6. Test your login into your new floor and verify all configurations are as expected.
7. Delete the old floor.

Note: When uploading a csv, if you leave a room number blank, the system will assign any open room to that user. Duplicate or invalid email addresses will result in an error and will be displayed in a popup window.

Guest Information Tab



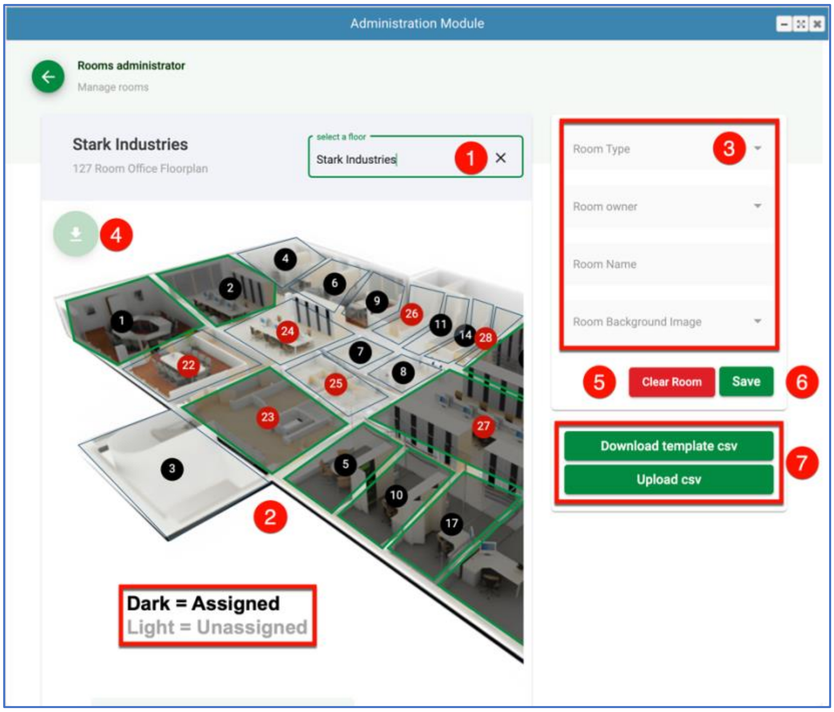
The guest information tab allows you to set the required/optional information to be provided by your guests when they visit your floor. The minimum required information is the guest's name and the person they are visiting. All other fields are optional when the switch is **off** and are required when the switch is **on**.

If you want your guests to have their picture in their avatar, simply enable the **Picture required** switch. Upon entering all their information, the system will take a picture from their camera when they click the **Visit** button. Please note that guest images are not stored in the platform.

Note: If a guest tries to login without entering a required field, the system will display an error message and will not allow them to visit you until all required fields have been filled in.

Rooms Administrator

The **Rooms Administrator** app allows you to configure rooms and assign owners to offices.



Room Administrator Controls

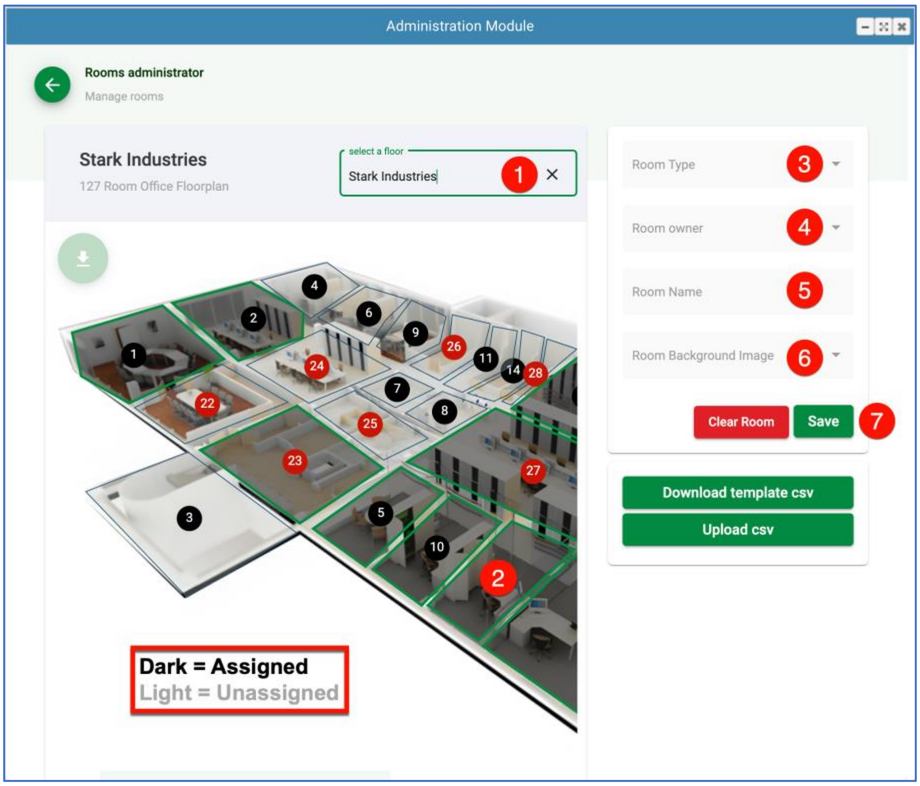
1. **Floor Selector**. Dropdown list to select the desired room.
2. **Floor Map**. Image of floor plan and room definitions.
3. **Room Definition Fields**.
4. **Floor Map Image Download**.
5. **Clear Room**. Clears all information from selected room.
6. **Save Room**. Saves all updates to selected room.
7. **CSV Download/Upload**. Allows for the configuration of rooms via csv.

Room Types

There are two main types of rooms in a floorplan: **Offices** and **Special Purpose Rooms** (Break Rooms, Cube and Study Carrels, Lobbies, Meeting Rooms, Training Rooms & Classrooms). The difference between these types is that an **Office** is owned by a user, **Special Purpose Rooms** are not owned by anyone, instead, they are a shared resource. Offices have additional capabilities like locking a door, sending notifications to its owner, etc.

Both room types will have a name that will be displayed in the floorplan when someone hovers over it and background image that will be displayed when someone enters the room.

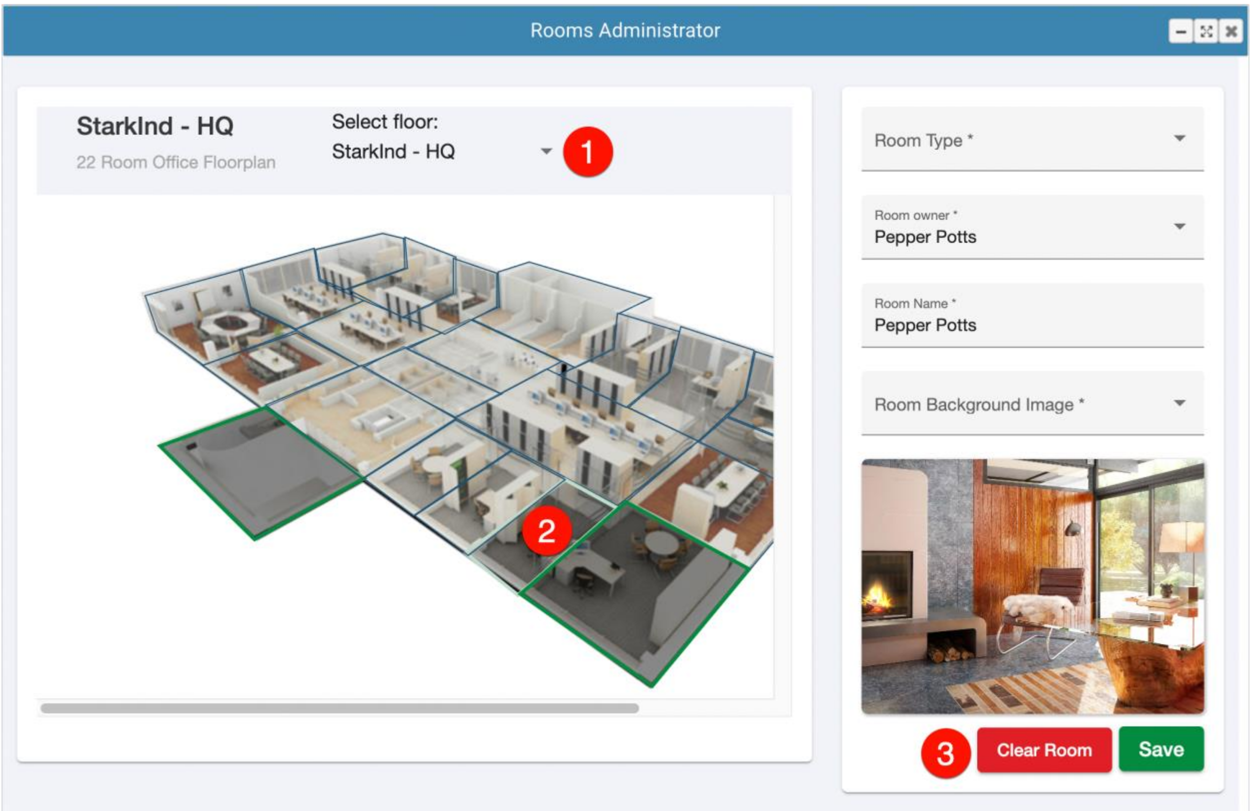
You can assign any room in the floorplan to be an office or any of the special purpose room types regardless of the appearance of the image in the floorplan. In other words, if a floorplan image shows a big corporate meeting room with a 20-seat conference table, it does not mean it can only be designated as a conference room. It could also be used as an office or any other room type.



Assign a User to an Office

To assign a user to an office, open the **Rooms Administrator** app from the **Administration Module.**

1. Select the **Floor** the users will be assigned to
2. Click on a clear (unassigned) **Room** in the map
3. Select the **Office** as the Room Type from the dropdown list
4. Select the **Room Owner** from the dropdown list
5. Enter the **Room Name**
6. Select the **Room Background Image** from the dropdown list
7. Click **Save**

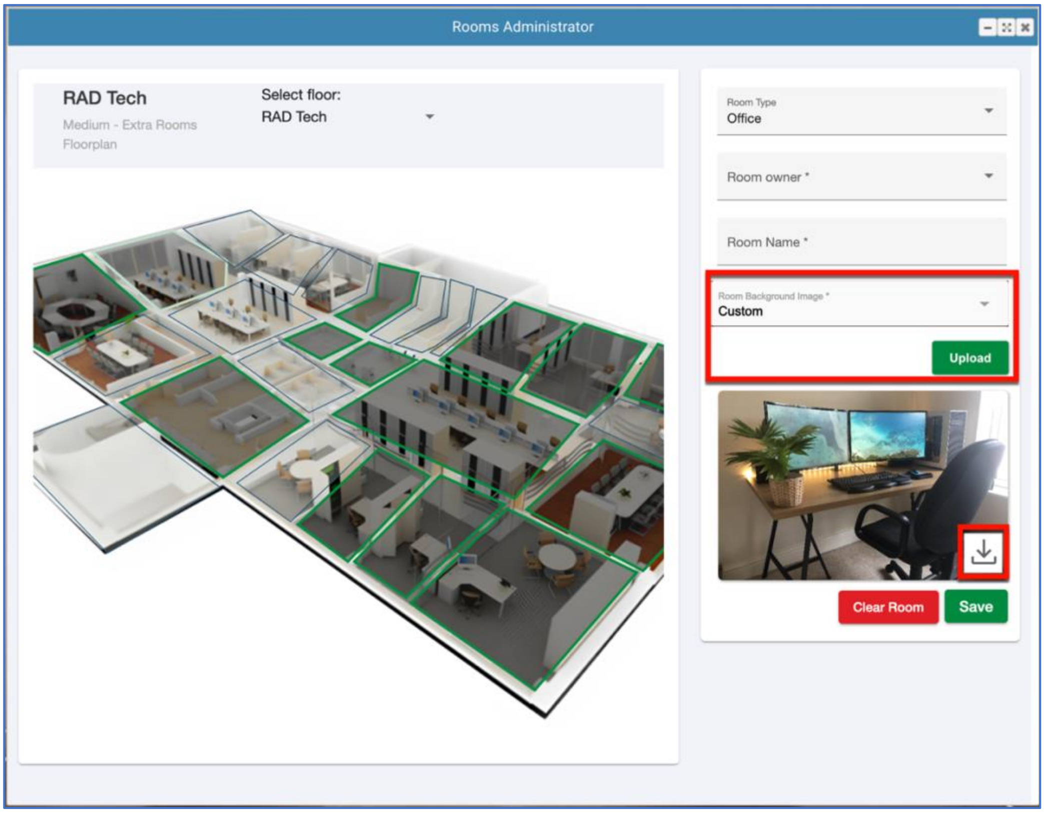


Move a User to a Different Office

To move a user to a different office, **Rooms Administrator** app from the **Administration Module.**

1. Select the **Floor** that the user currently belongs to
2. Click the **Room** that the user currently belongs to
3. Click the **Clear Room** button
4. Proceed to assign a new room to the user as described in the **Assign a User to an Office** section above.

Upload Custom Background Images



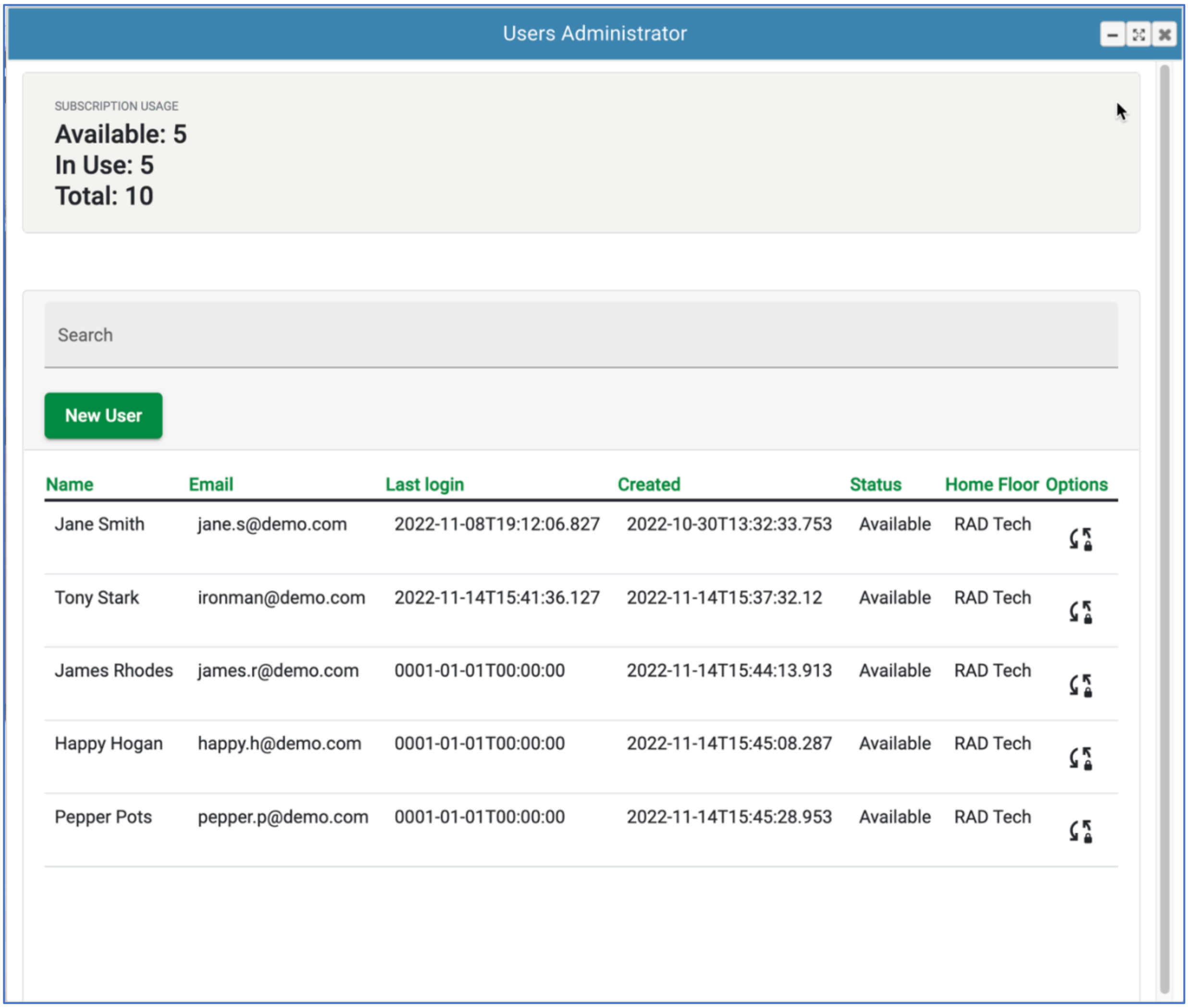
To upload a custom background image to your office, open the **Rooms Administrator** app from the **Administration Module** and select the room you wish to modify.

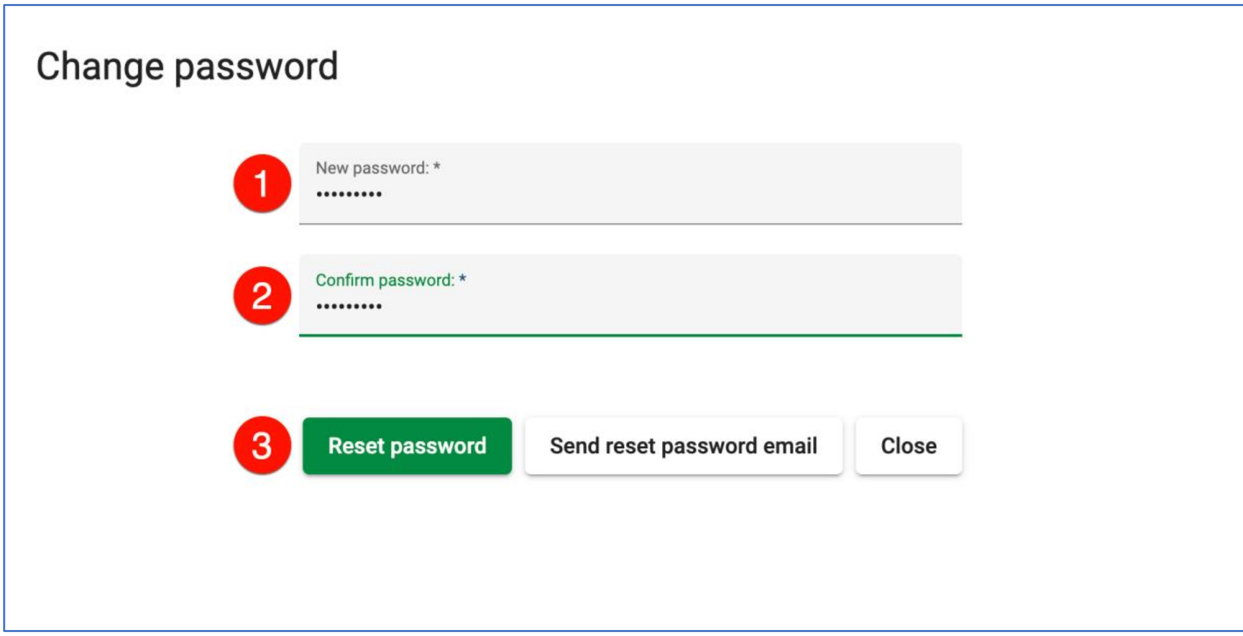
1. In the **Room Background Image** dropdown list, select **Custom** and press the **Upload** button.
2. Select your image from the file dialog and press **Open.**

Note: To download the current image so you can modify it (like place logos or custom branding images), simply click the **Download** icon in the lower-right of the image. This will place the image in your file system for you to edit in an image editor. Once finished, you can re-upload it using the above steps.

Users Administrator

The **Users Administrator** app allows you to add/modify/delete users from your organization. For large organizations, the app has a search function that allows you to quickly filter the displayed list to find the desired user. To change a user simply click the desired user from the list and you will be taken to an **Edit** screen. To add a new user, simply click the **New User** button.



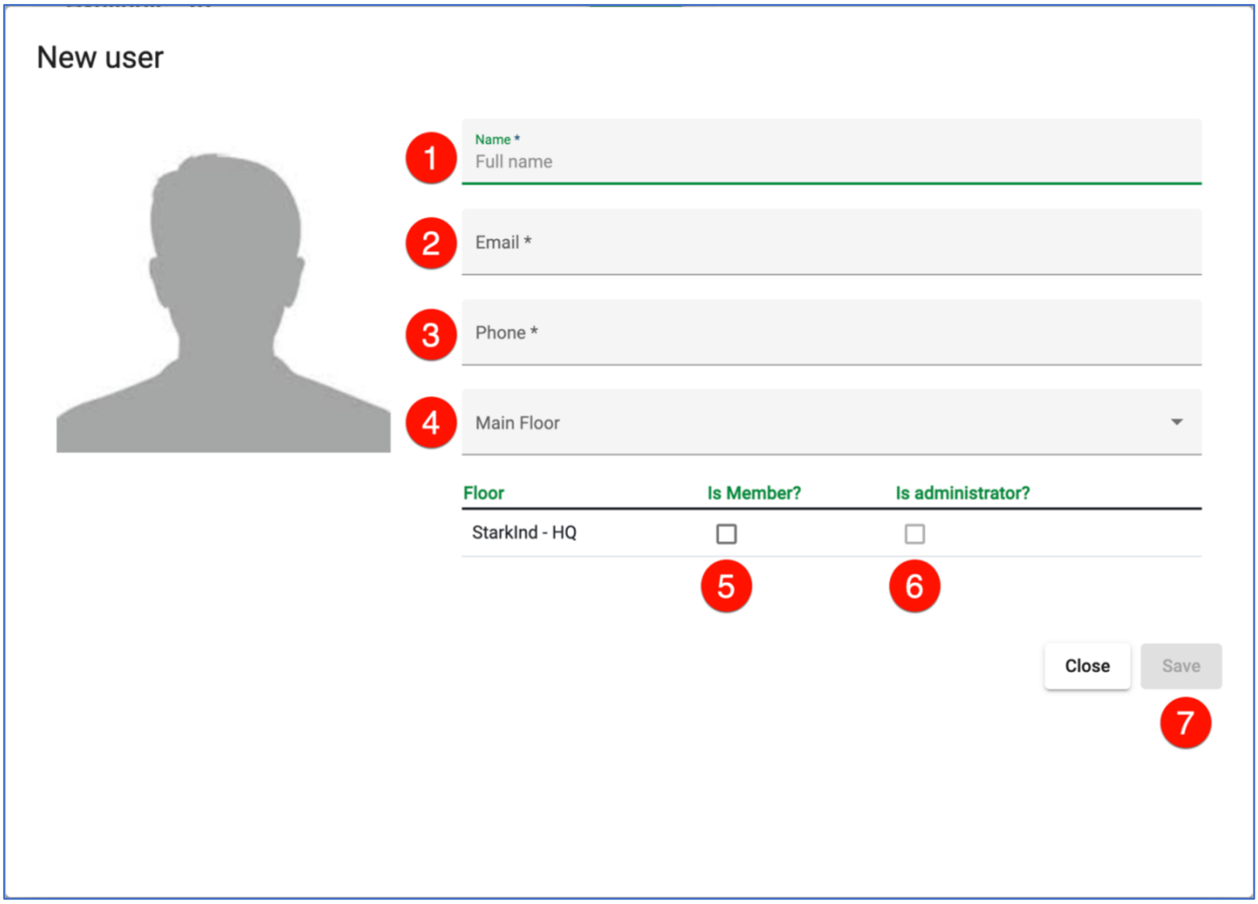


Reset a User's Password

To reset a user's password, open the **Users Administrator** app from the **Administration Module** and select the users to reset from the list. At the end of the user's line, click the **Reset Password** icon.

1. Enter the User's **New Password**
2. Confirm the User's **Password**
3. Click the **Reset Password** button

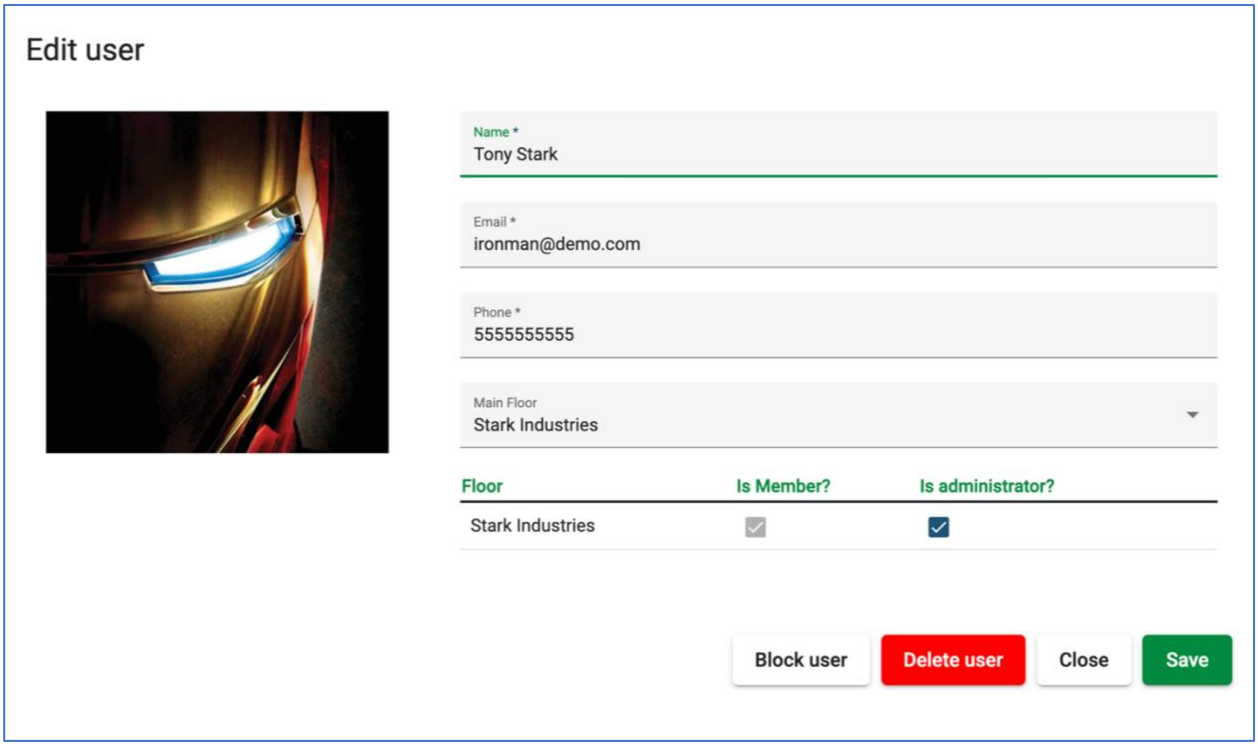
You also have the option of sending users a reset password link so they can change their password themselves.



Add a New User

To add a new user, open the **Users Administrator** app from the **Administration Module** and click the **New User** button.

1. Enter the User's **Full name**
2. Enter the User's **Email**
3. Enter the User's **Phone**
4. Select the **Main Floor** the user will belong to from the dropdown list
5. Check the **Is Member** checkbox for the all the floors the user will have access to
6. Check the **Is admin user** check box if the user will be an administrator for the specific floor(s) he will have access to
7. Click the **Save** button



Edit a User

To edit a user, open the **Users Administrator** app from the **Administration Module** and select the user from the list.

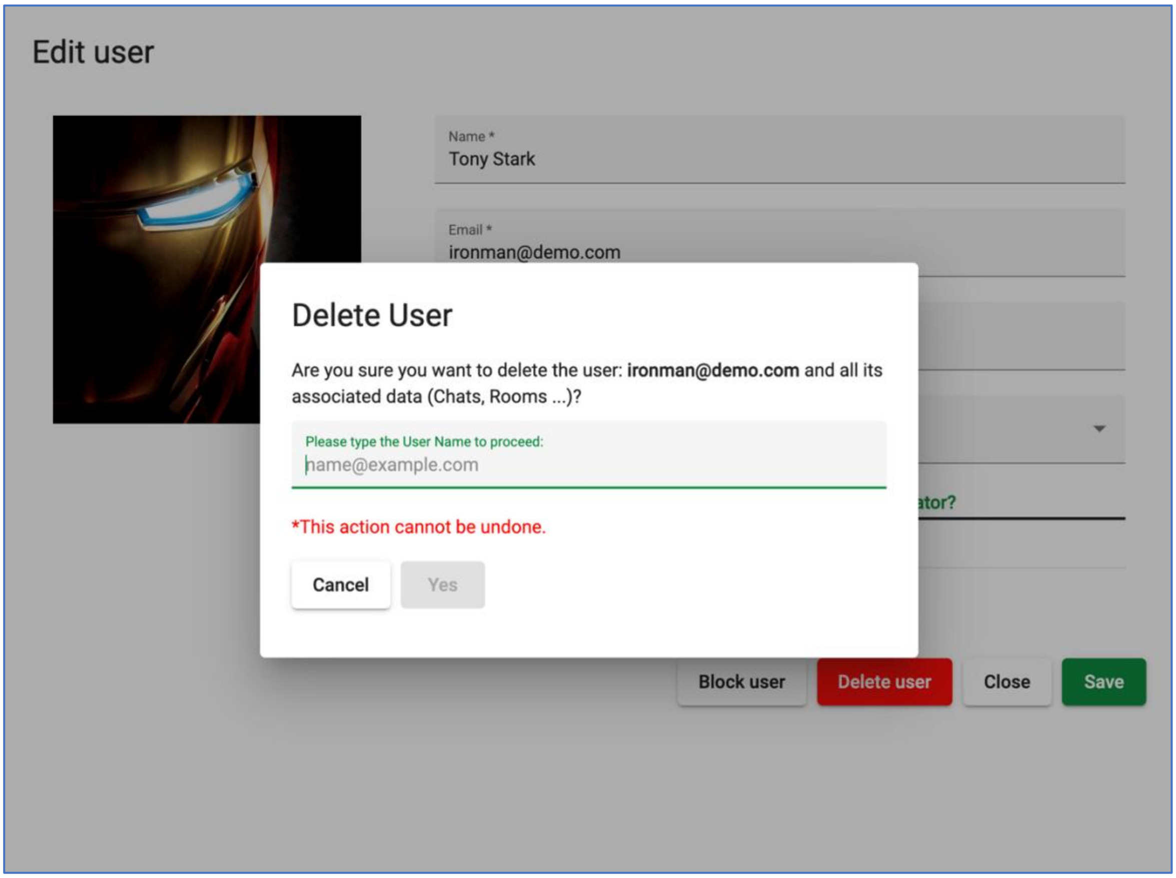
1. Edit any of the **user's information** as required
2. Edit the **floor access** and administrator flags as required
3. Click **Save** to save changes and exit to main screen

Click the **Block user** button to disable or prevent the user from login in.

Click the **Close** button to close the screen.

Click the **Delete user** button to permanently delete a user from the system. You will be asked to type the email of the user being deleted to confirm this action. Once the confirmation email has been entered and it matches with the user's email, you can click the **Yes** button and the user will be deleted.

Note: Deleting a user will increase the available number of licenses in your subscription.

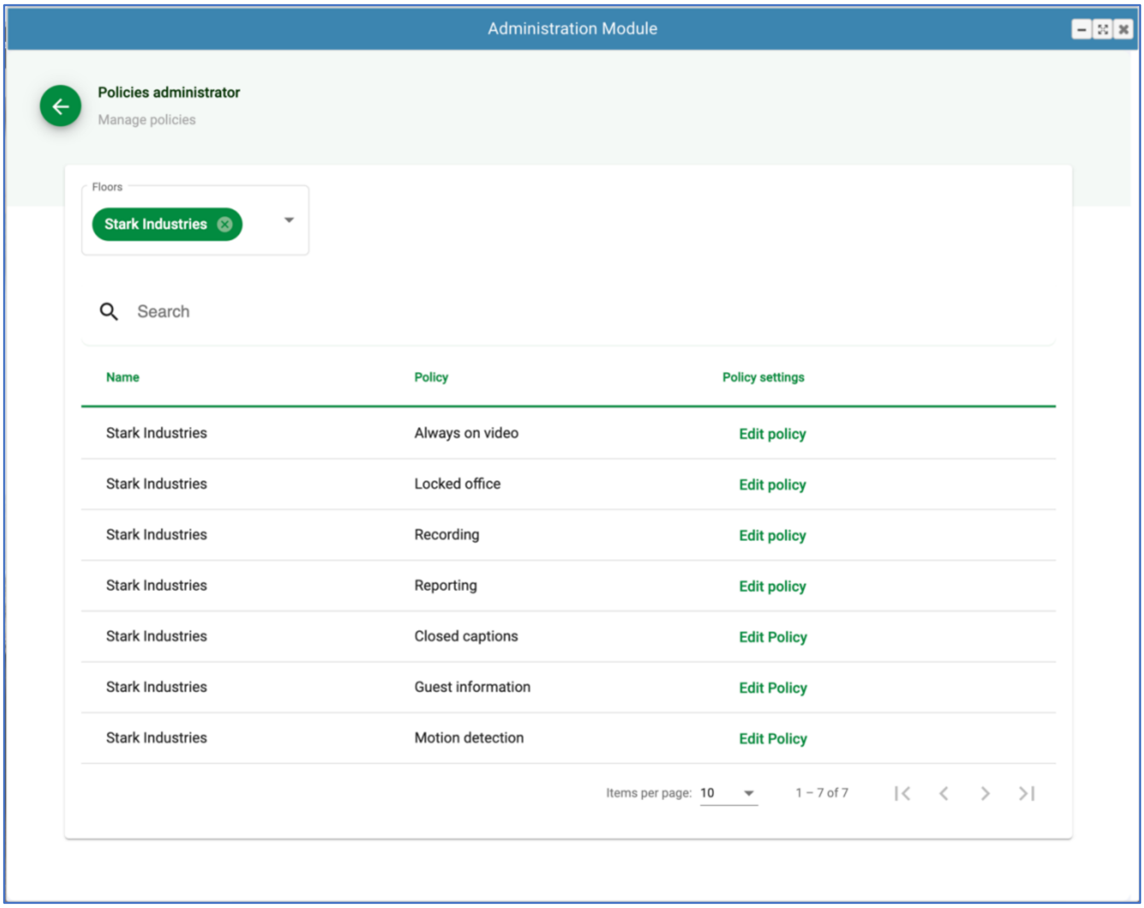


Warning: This action cannot be undone! Once you click the **Yes** button, all user information will be deleted from the system. This includes:

- Room assignment & room configuration
- Chat account & chat history
- Single-Sign-On tokens
- Floor access permissions

Policies Administrator

The **Policies Administrator** app allows you to set global policies for your organization. For example, you might want to enable always on video which will automatically initiate a video conference with the room owner as soon as you enter their room, or someone visits you in your office.



System-wide Policies

There system-wide policies available for configuration include:

1. **Always On Video Policy**
   The always on video policy sets the default video behavior when a user enters a room. If the policy is **On**, the users audio and video will automatically become enabled when entering a room. If the policy is **Off**, the user will have the option to enable his video when entering a room by clicking the phone icon in the toolbar.

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2. **Locked Office Policy**
   The locked office policy sets the default behavior for the doors in user offices. If the policy is **Locked**, all your users will have locked doors by default. If the policy is **Unlocked**, all your users will have an open-door policy by default.

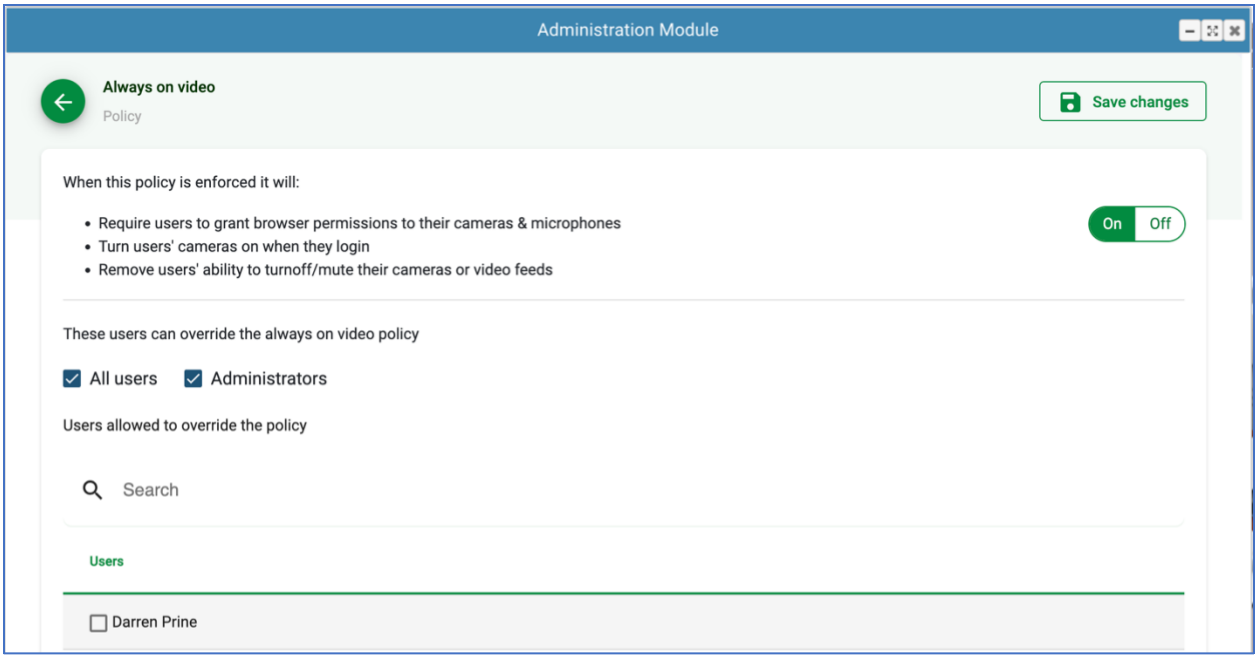
3. **Recording Policy**
   The recording policy defines who is allowed to record the audio and video during meetings. By default, **Everyone** is allowed to use the recording feature.

4. **Reporting Policy**
   The reporting policy defines what users will have access to the reporting module. The reporting module provides insights into the usage of the platform and activity metrics for the users. This module is located under the Business Tools menu of the application tool bar. By default, only administrator have access to the reporting module.

5. **Closed Captions**
   The closed captions policy allows an administrator to select who can activate closed captions and transcripts during a meeting.

6. **Guest Information**
   By default, the required guest information in the login screen is defined by the administrator in the Floors Administrator module. This policy allows users to specify what information will be required by guests when they visit them.

7. **Motion Detection**
   The motion detection policy allows an administrator to activate motion detection on the user's video. If the detection AI does not recognize human activity, it will create an entry in the missing in action report with the duration of the event.



Always On Video Policy

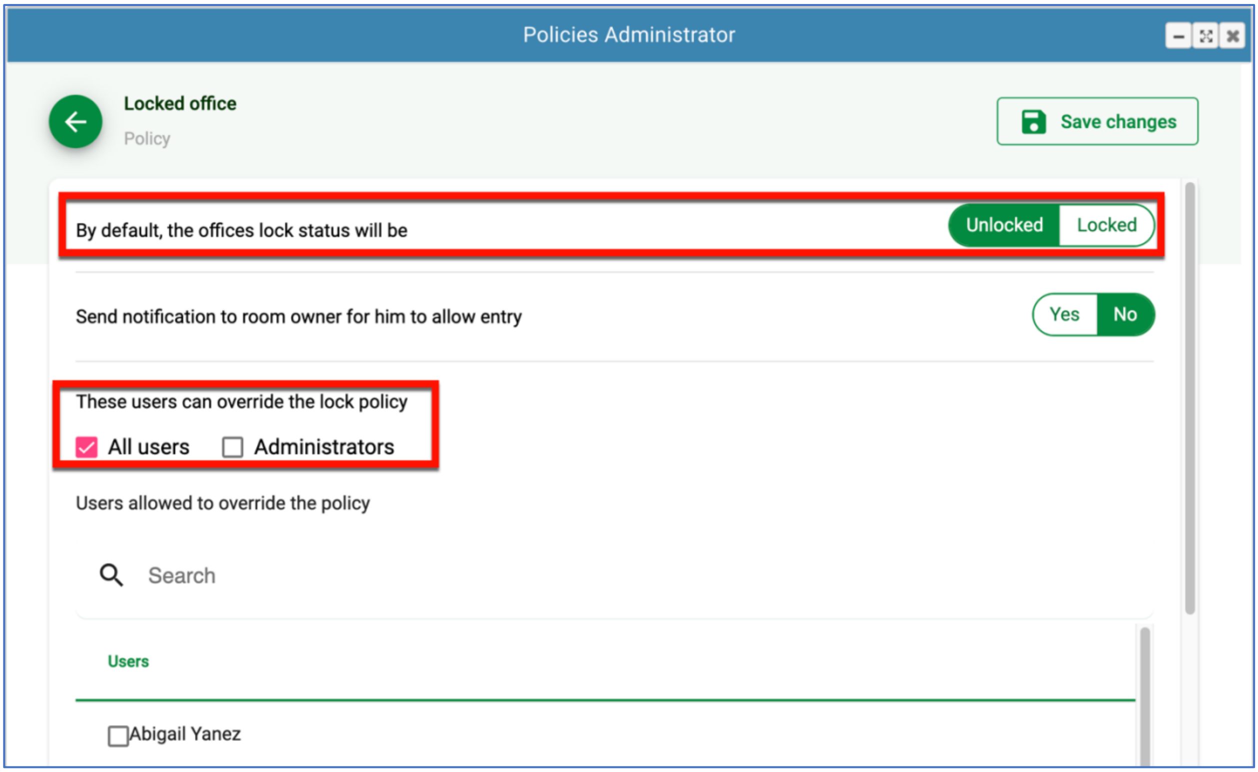
The always on video policy controls how the user will interact with the video system in the platform. Outcomes:

1. Policy is **OFF** with **NO** Overrides. Users video will be turned **off** by default and users will not be able to initiate video calls.
2. Policy is **OFF with** Overrides. Users video will be turned **off** by default and users will be able to initiate video calls or disable their camera.
3. Policy is **ON** with **NO** Overrides. Users video will be turned **on** by default and users will not be able to terminate video calls or disable their camera.
4. Policy is **ON with** Overrides. Users video will be turned **on** by default and users will be able to terminate video calls and disable their camera.

Policy Override

You can select what users are allowed to override the policy. You can select **All users**, **All Administrators** or **individual users**. To set your override preferences, simply check the corresponding checkboxes next to your desired user group.

Once you configure your policies, press the **Save Changes** icon to enforce the policy.

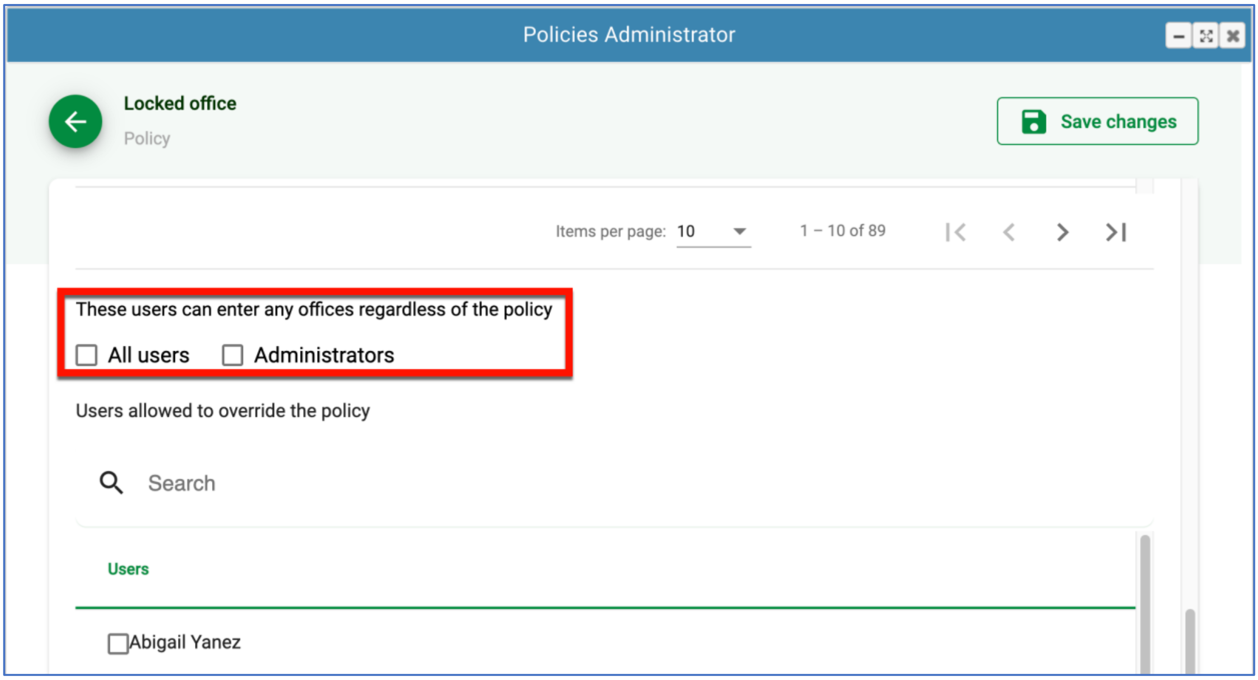


Locked Office Policy

The locked office policy sets the default behavior for the doors in user offices. If the policy is **Locked**, all your users will have locked doors by default. If the policy is **Unlocked**, all your users will have an open-door policy by default.

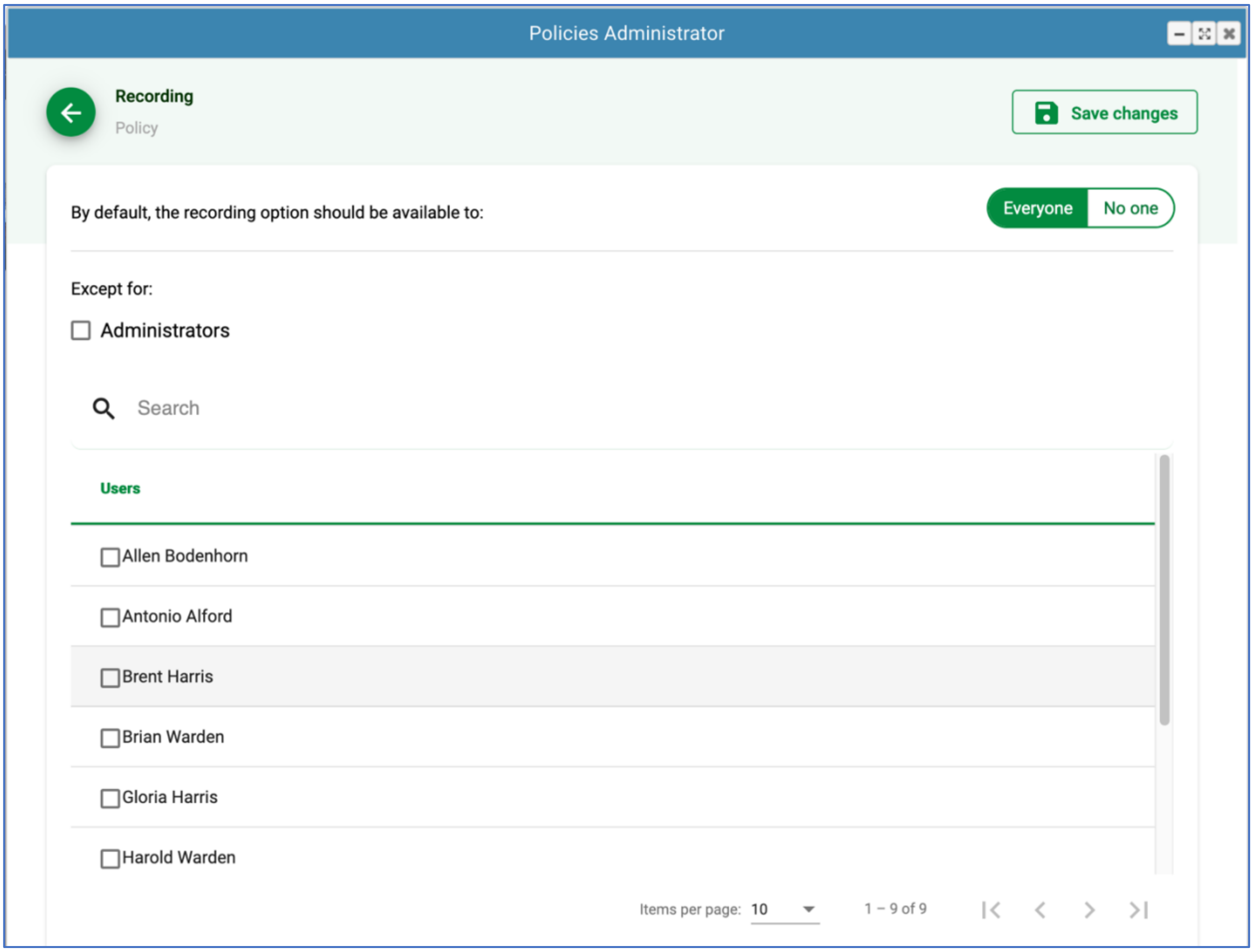
Warning: Please pay close attention to the override policy. If you don't allow all users to override the policy, this means that they will not have the ability to lock or unlock their offices.

If the **Lock Status** policy is set to **Locked**, you can also specify what happens when a user tries to enter a locked office. If you enable the **Send Notification to Room Owner** policy, a notification will be sent to the room owner, and he/she can decide if you are allowed to enter and join the room. If the policy is set to **No**, then the user trying to enter the locked office will be denied access and the office owner will not be notified.



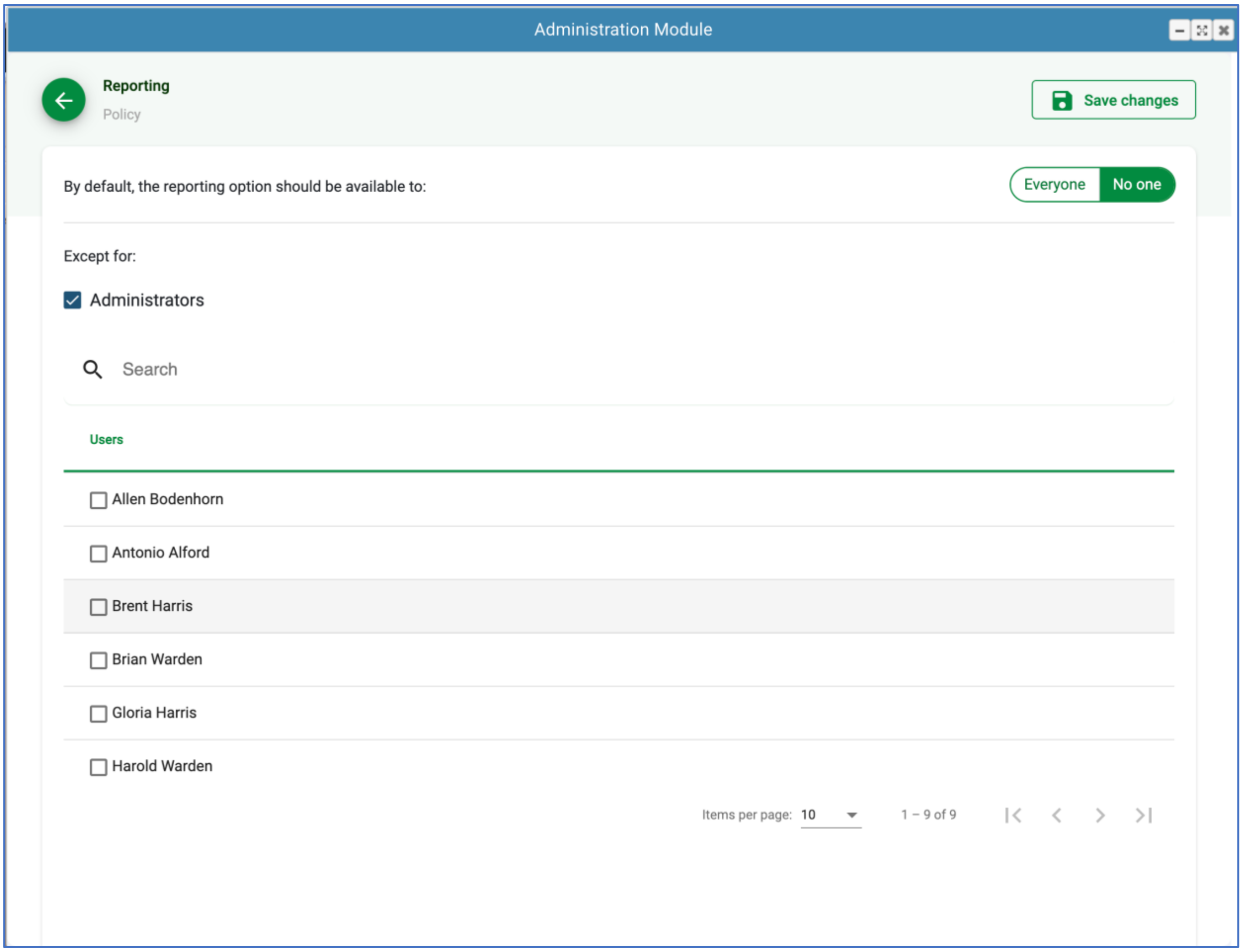
Additionally, you can also select which users will have the ability to enter any office regardless of the locked door status. You can select **All users, Administrators, or individual users**.

Once you configure your policies, press the **Save Changes** icon to enforce the policy.



Recording Policy

The recording policy defines who is allowed to record the audio and video during meetings. By default, **Everyone** is allowed to use the recording feature. To enable recording for everyone, set the toggle switch to **Everyone** and click **Save Changes.** To prevent recording for everyone, set the toggle switch to **No One** and click **Save Changes.** You can also define exceptions for this policy. Under the **Except for:** list, you can select what users and/or administrators you want to exclude from the policy setting.

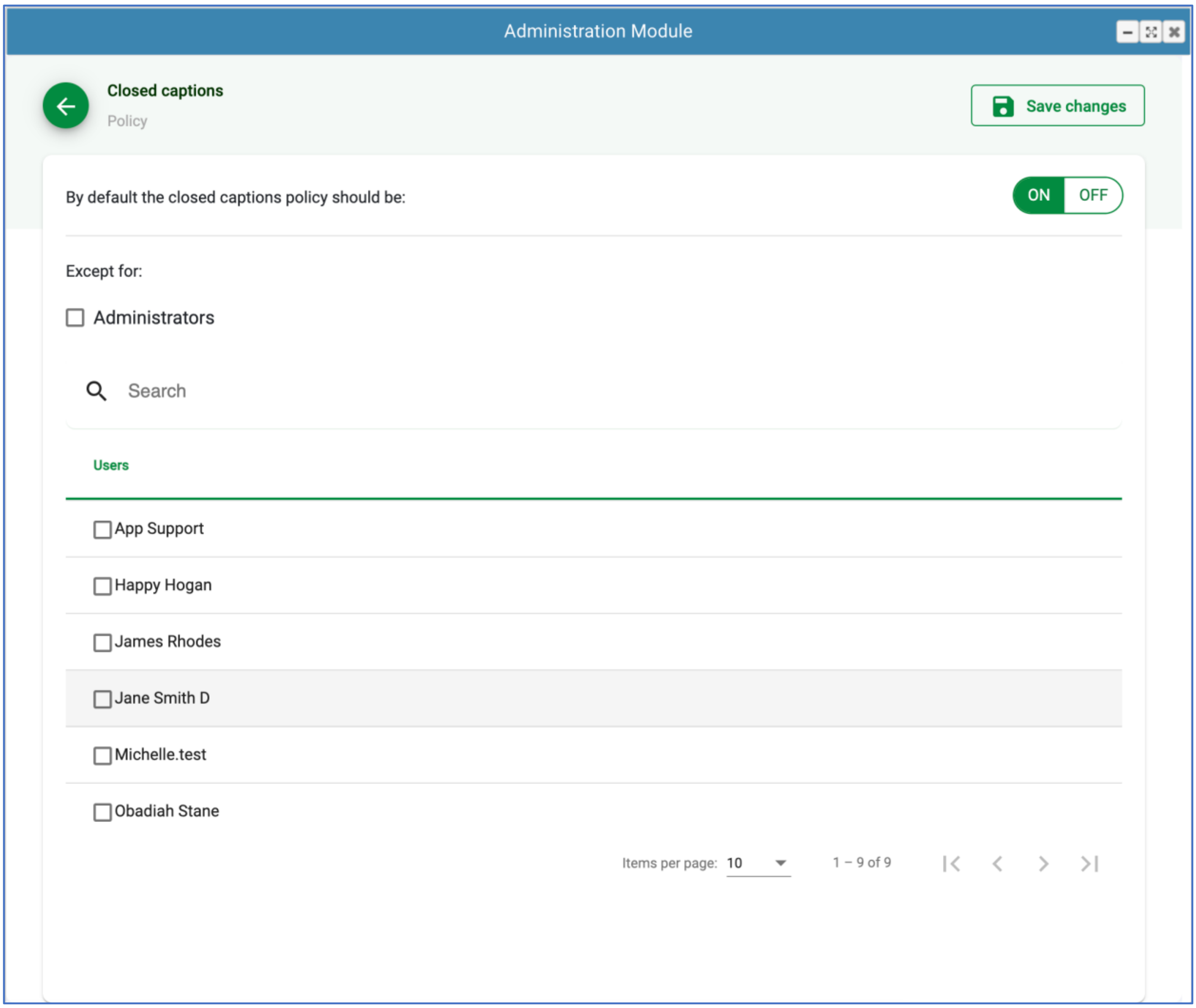


Reporting Policy

The reporting policy defines who is allowed to run the administrative reports. By default, no one is allowed to run or view reports except for the **Administrators.** You can also define exceptions for this policy. Under the **Except for:** list, you can select what users you want to allow to run and view reports.

Closed Captions Policy

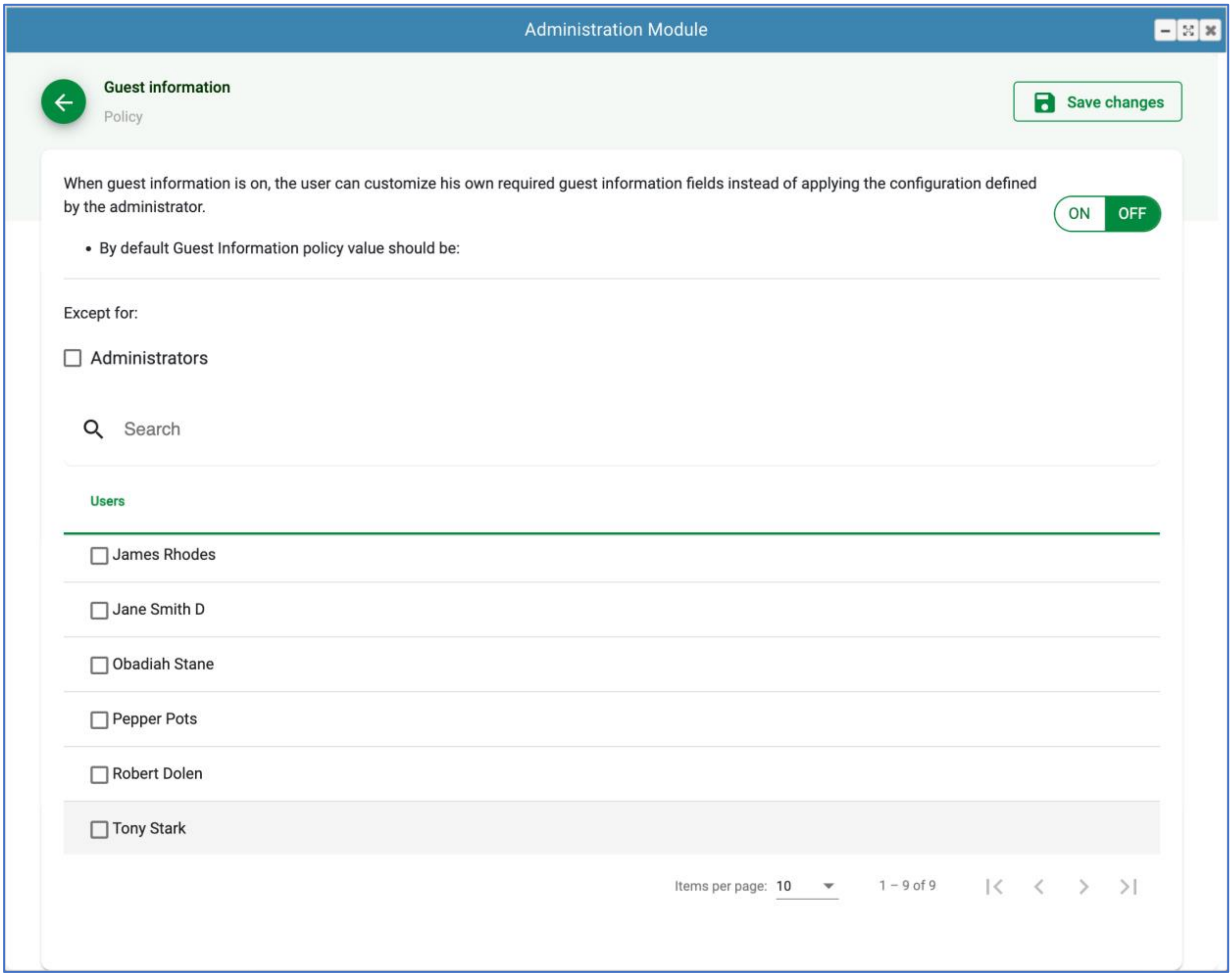
The closed captions policy allows an administrator to select who can activate closed captions and transcripts during a meeting. This policy is **On** by default, meaning that everyone is allowed to display closed captions and live transcripts during a meeting.



Setting this policy **Off** would prevent everyone from activating the closed captions or live transcripts during a meeting.

Guest Information Policy

By default, the required guest information in the login screen is defined by the administrator in the **Floors Administrator** module. This policy allows users to specify what information will be required by guests when they visit them.

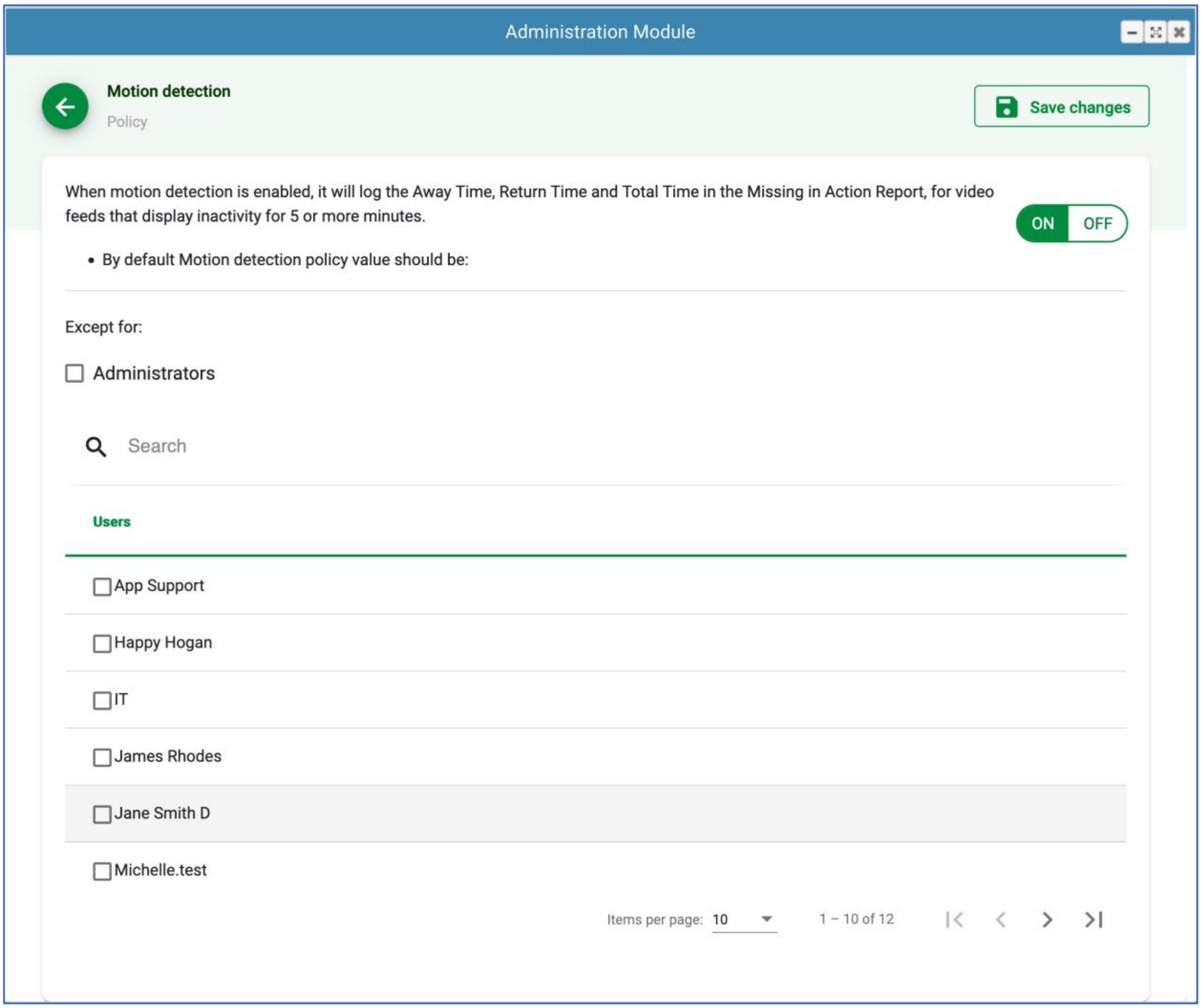


This policy is turned **OFF** by default. This means the required guest information is defined by the administrator. To allow some users the ability to specify their own requirements, simply select the users from the exception list. The selected users will be able to configure the required guest information by selecting the **Guest Information tab** in their profile.

If you want to grant everyone the ability to specify their own requirements, simply set this policy to **ON**.

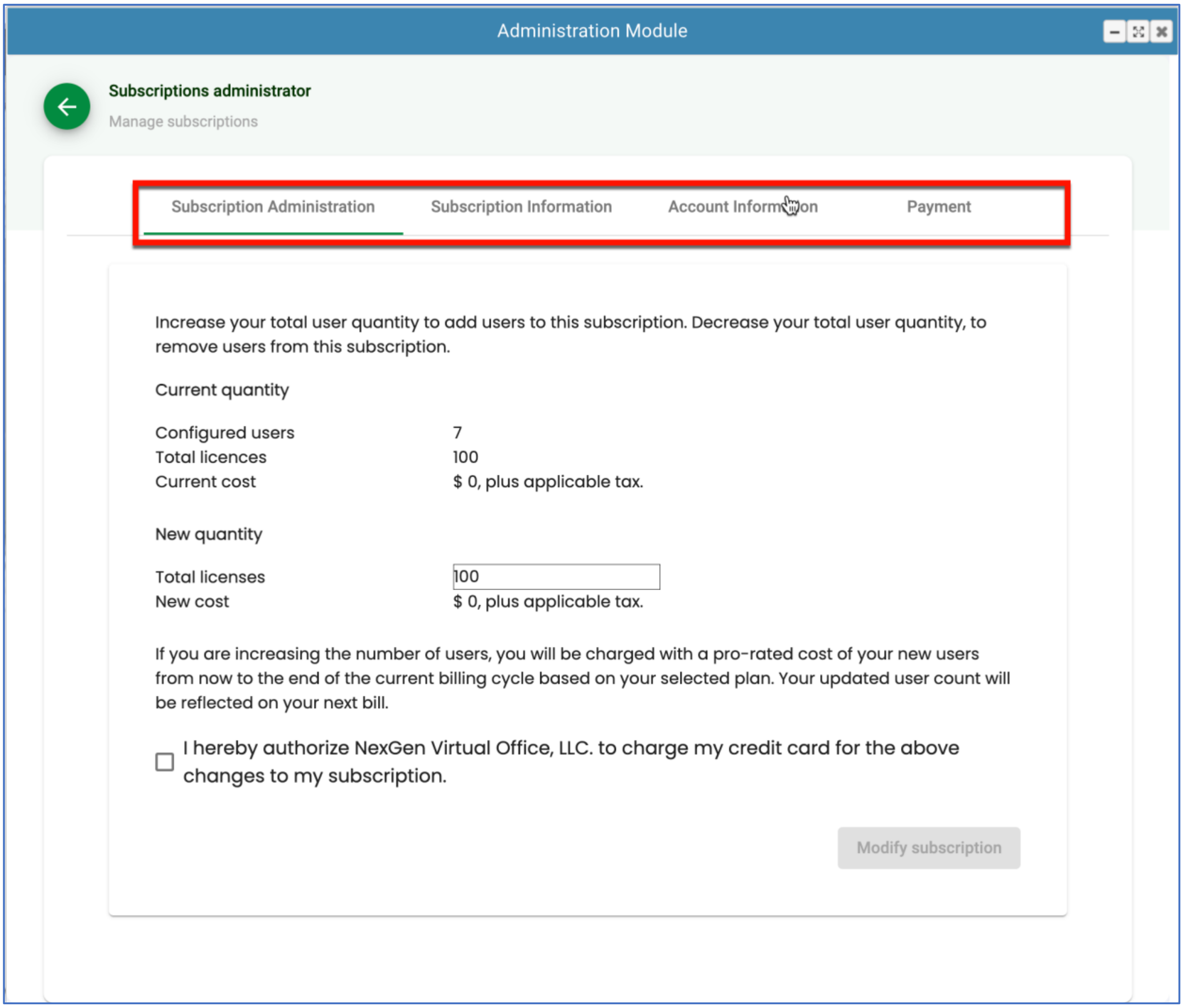
Motion Detection

The motion detection policy allows an administrator to detect human presence on the user's video. If the detection AI does not recognize a human, it will create an entry in the missing in action report with the duration of the event.



Subscription Administrator

The **Subscription Administrator app** allows you to manage your subscription details for your NexGen Virtual platform.



The administrative functions are divided into four tabs:

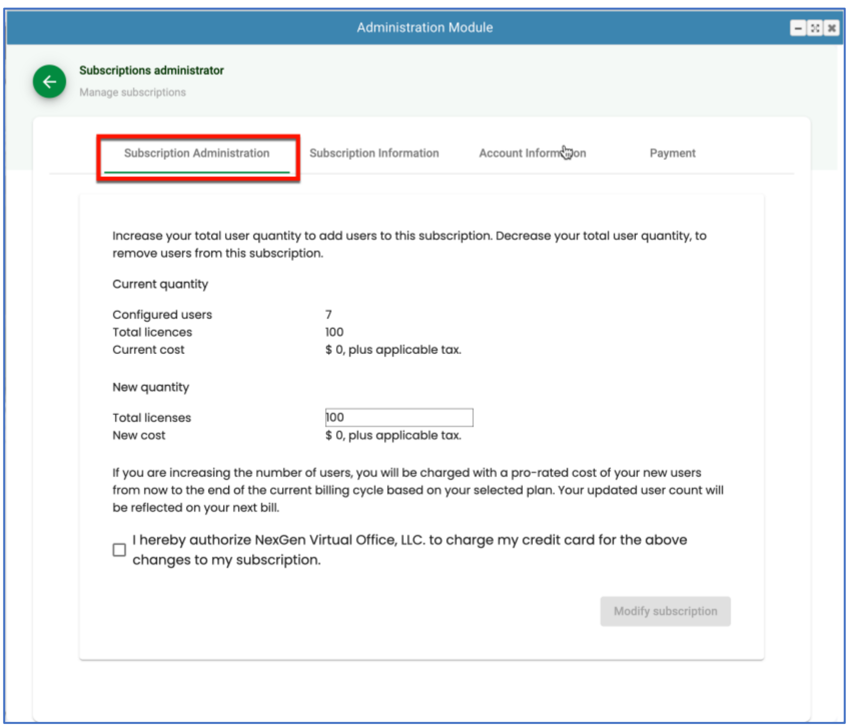
1. **Subscription Administration**. Allows you to adjust the number of licenses in your subscription.
2. **Subscription Information**. Allows you to cancel or change subscription plan.
3. **Account Information**. Allows you to update the contact information.
4. Payment. Allows you to edit your credit card payment details.

Subscription Administration Tab

The **Subscription Administration** tab allows you to manage the number of user licenses in your subscription.

The app will display your current user quantity and new user quantity. As an example, let's suppose that my current subscription is for 10 users and I want to increase it to 20 users. In the Total licenses field, I would need to enter 20 to update my subscription to a total of 20 licenses.

Warning: When trying to reduce the number of licenses in your subscription, the system will validate that the total number of licenses you want to reduce to is greater than or equal to the total number of users in your organization. In other words, let's say you have 20 users in the system and you want to reduce your licenses to 10, you would have to delete 10 users from the system for the tool to effectively reduce your subscription to 10.



Increase or Decrease the Subscription Quantity

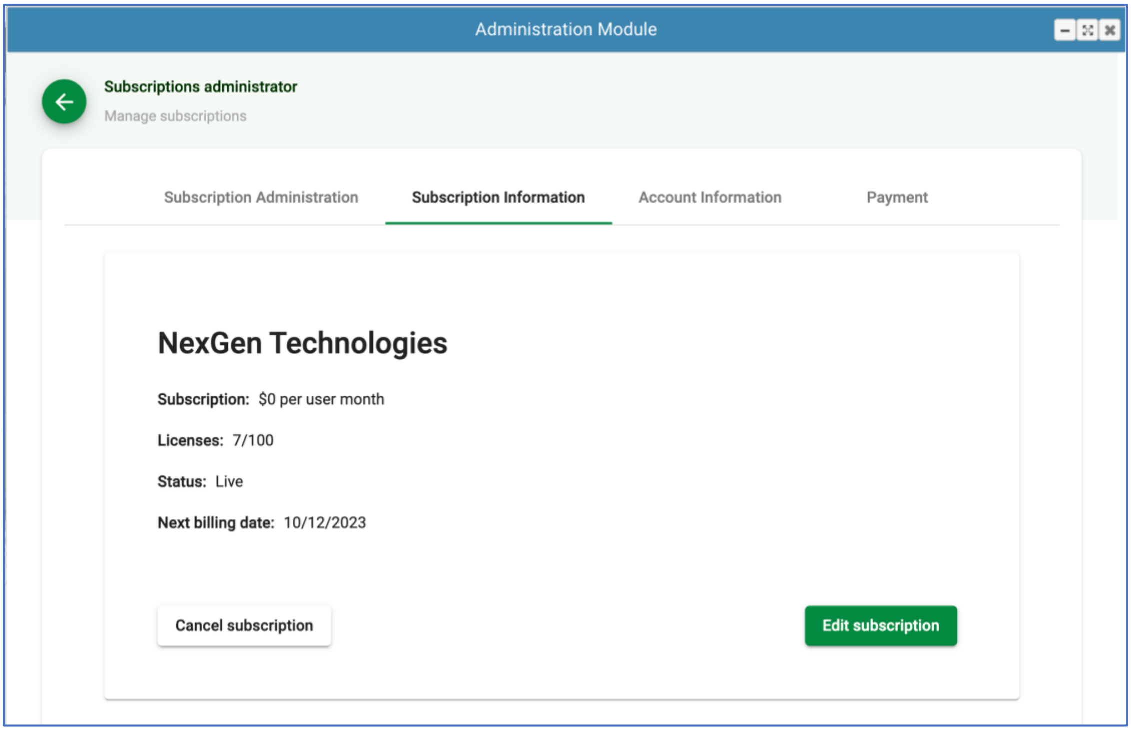
To adjust your subscription license count, open the **Subscriptions Administrator** app from the **Administration Module** and select the **Subscription Administration** tab.

1. Enter the **Total licenses** you wish to adjust your subscription to
2. Check the **Authorization** checkbox
3. Click the **Modify subscription** button

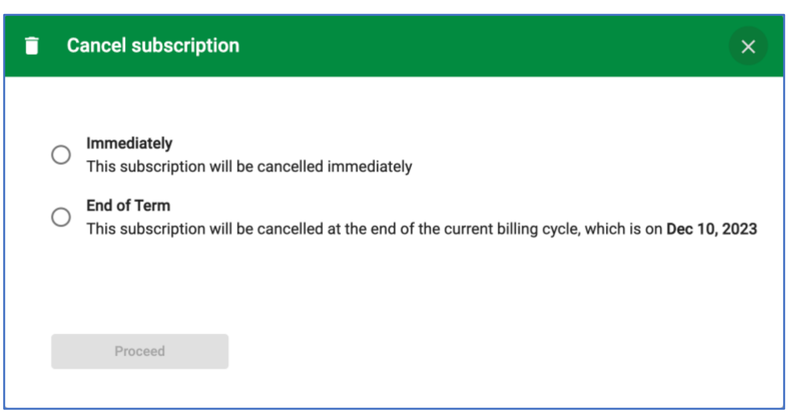
Once you click the **Modify subscription** button, the system will update your subscription and automatically bill you for any increases to your total licenses. You will receive an email with your payment and your subscription detail.

Subscription Information Tab

The **Subscription Information** tab allows you to edit or cancel your subscription.

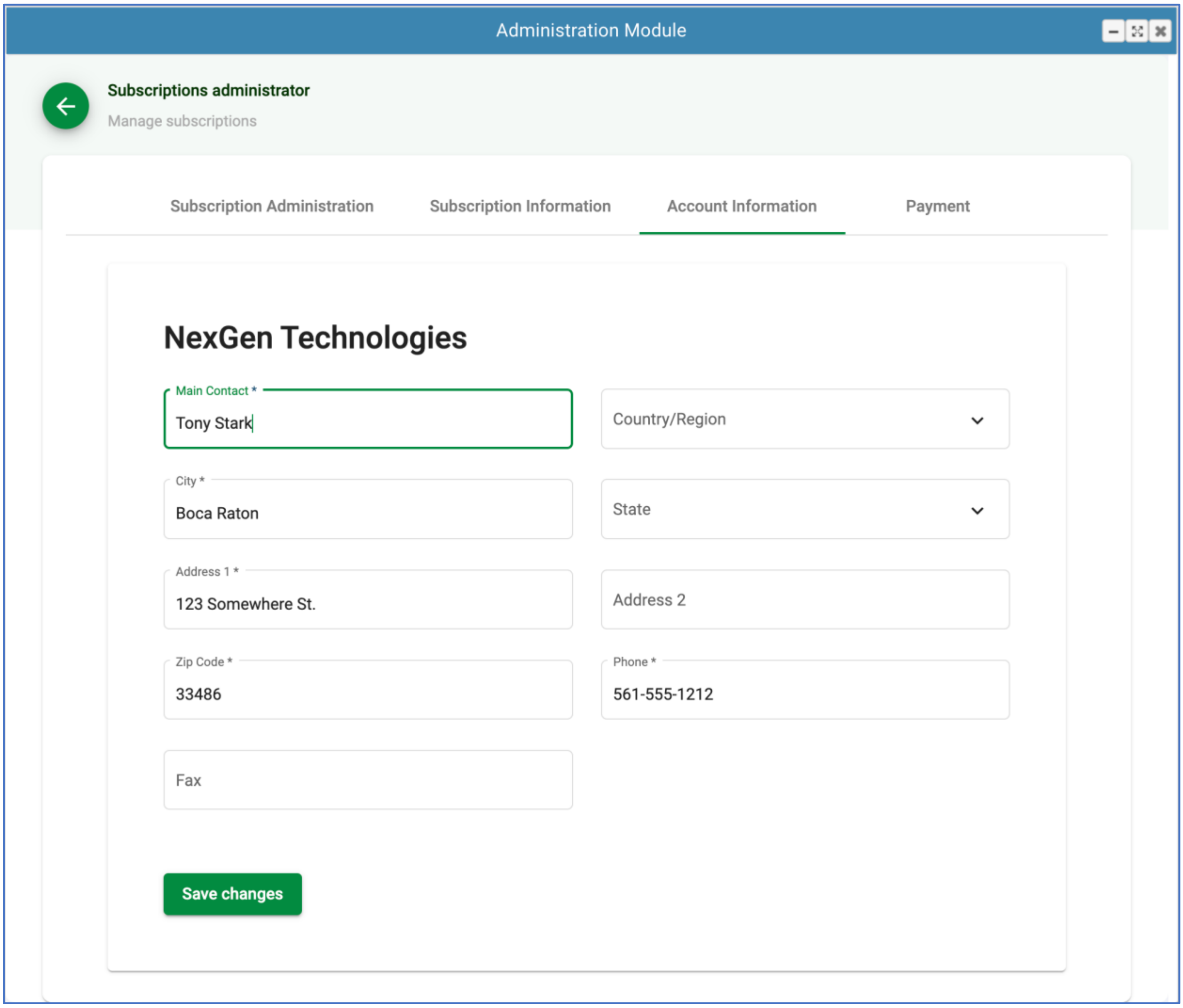


When clicking the cancel button, you will have a choice to cancel immediately or at the end of term. Click the **Proceed** button to submit the changes.



Account Information Tab

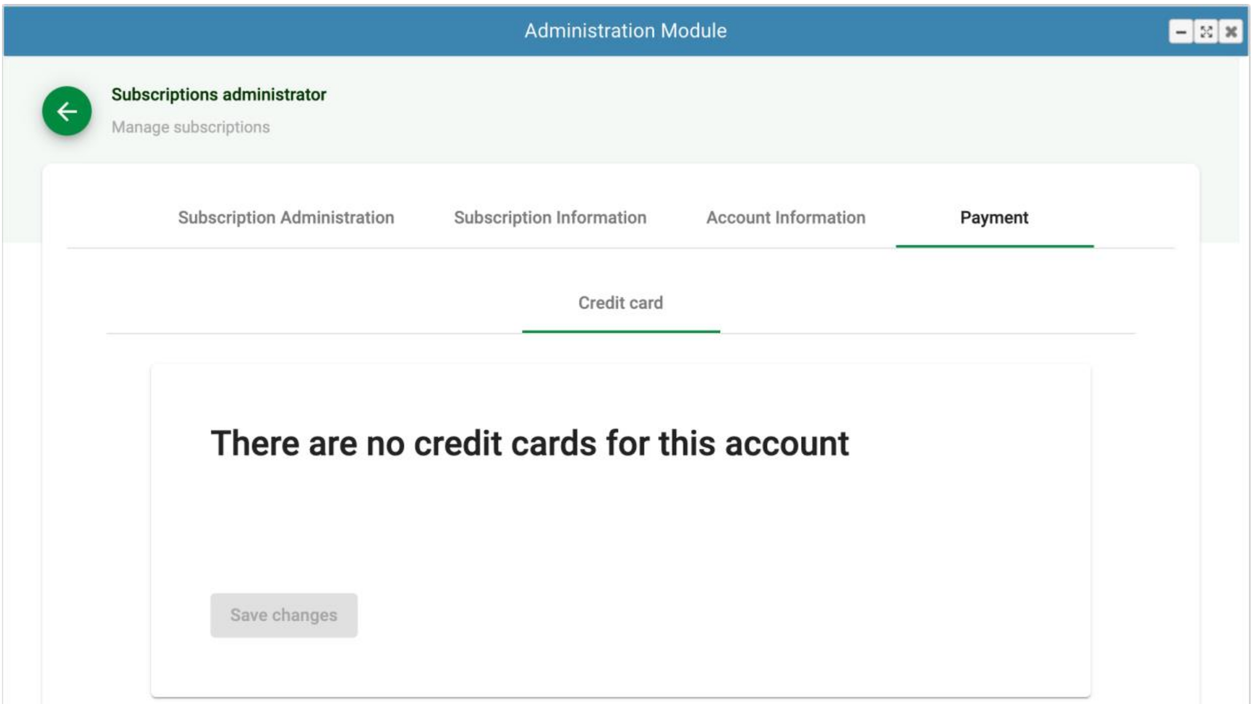
The **Account Information** tab allows you to edit the primary account holder's information.



To update any of the fields, simply enter the updated information and click the **Save changes** button.

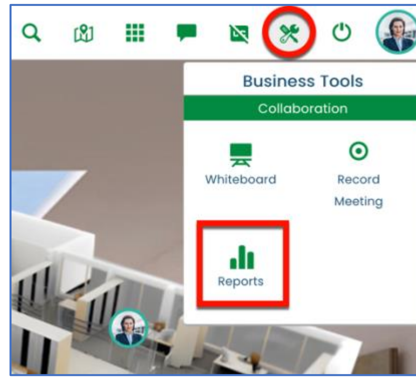
Payment Tab

The **Payment** tab allows you to update the primary account holder's payment information.



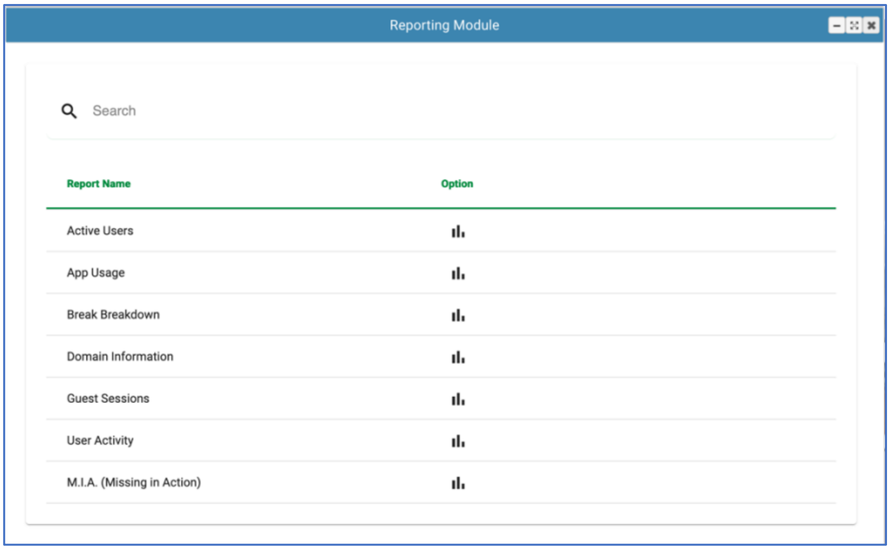
Reporting Module

The reporting module provides insights into the usage of the platform and activity metrics for the users. This module is located under the **Business Tools** menu of the application tool bar. The reporting module will be visible to users selected by your administrator.

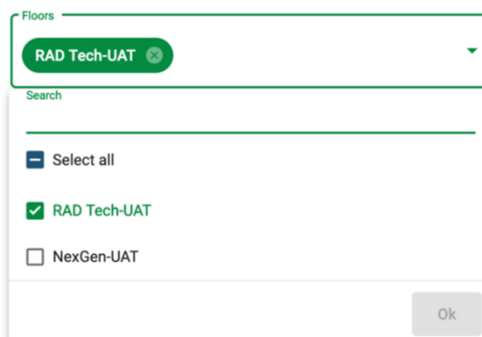


The reporting module includes the following reports:

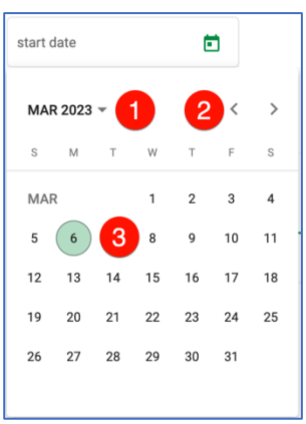
- **Active Users**
  Lists every user in the selected floor(s) along with their email address and last login date and time.
- **App Usage**
  Lists every application used by the users and counts the number of times the application was run for the selected floor(s) and date(s).
- **Domain Information**
  Lists the selected floor(s) and provides user counts for each status the account can have.
- **Guest Sessions**
  Lists every guest session for the selected floor(s) along with the host of the session and the guest information.
- **User Activity**
  Lists every user for the selected floor(s) along with metrics for that user, such as, counts for in-office time, number of guest sessions, number of internal meetings, and locked door times.
- **M.I.A. (Missing in Action)**
  The motion detection policy allows an administrator to activate motion detection on the user's video. If the detection AI does not recognize human activity for more than 5 minutes, it will create an entry in the missing in action report with the duration of the event.



Custom Input Fields



The reports contain two custom multi-select dropdown fields that allow you to select all records or specific records when making selections of **floors** or **users**. This provides a flexible way of filtering the data to just the records you want to view. They also have a built-in search feature so you can make quick selections instead of scrolling through the lists to make your selections.



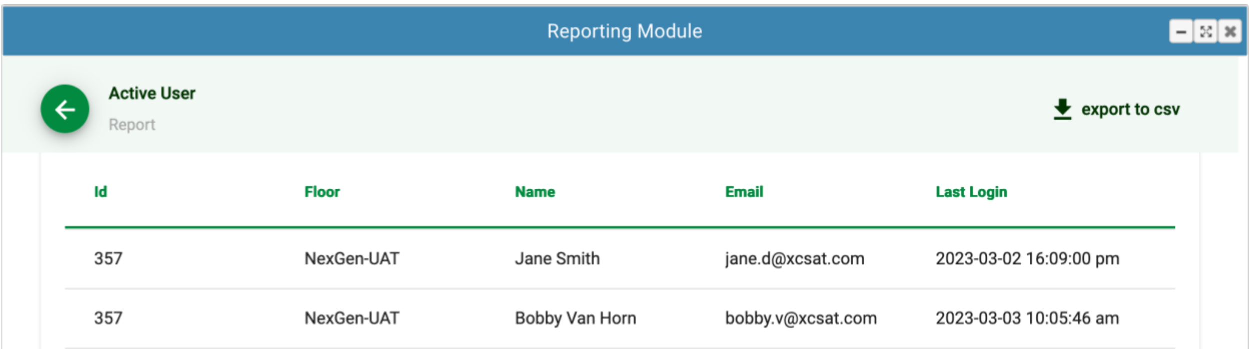
The date fields allow you to enter the date manually or by selecting a date from a calendar style popup with the following controls:

1. **Year** selection dropdown. Click on this field and the system will display popup with a list of 24 years to select from. Left arrow goes back 24 years. Right arrow goes forward 24 years.
2. **Month** selection arrows. Left arrow goes back one month. Right arrow goes forward one month.
3. **Day** selection. Simply click on a day and the system will return a fully formed date.

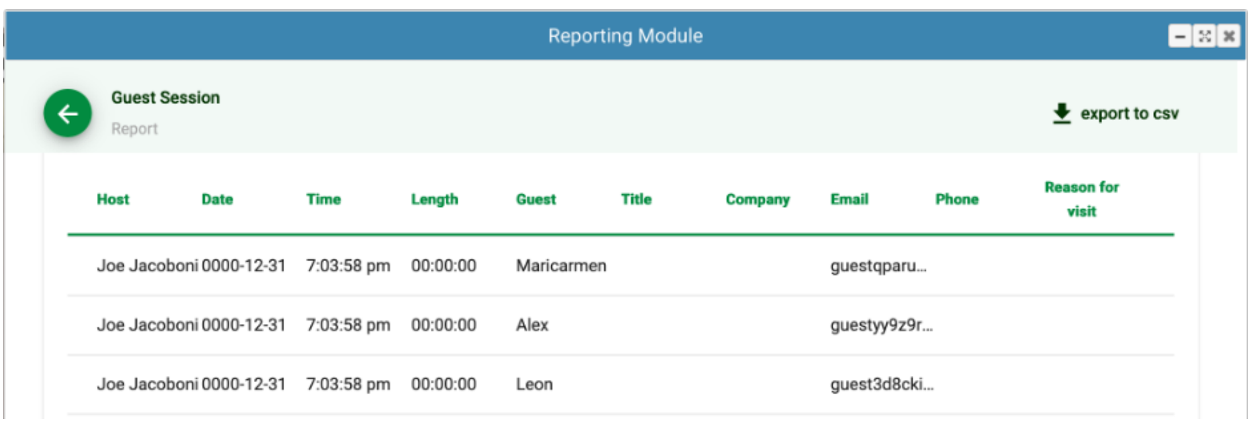
Note: All fields in the reports are mandatory. The **Run Report** button will remain grayed out until all fields have been filled. Once all fields have been populated, the Run Report button will be enabled and clicking it will then return the results based on your selections.

Once the Run Report field is clicked, the **Export to CSV** link will also be enabled so you can export your report into a csv field that you can then analyze in most spreadsheet applications.

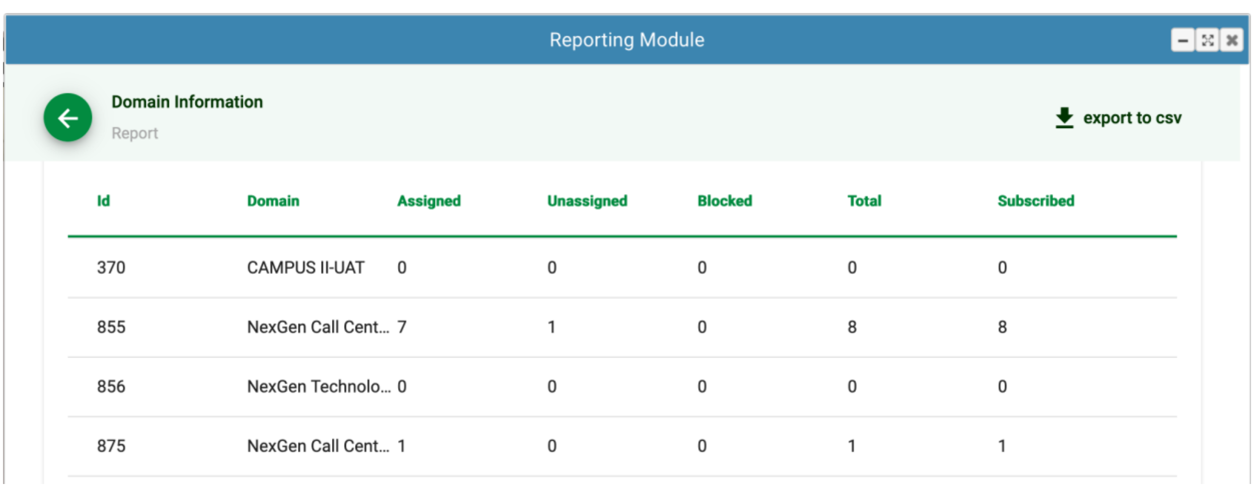
Sample Reports



Id	Floor	Name	Email	Last Login
357	NexGen-UAT	Jane Smith	jane.d@xcsat.com	2023-03-02 16:09:00 pm
357	NexGen-UAT	Bobby Van Horn	bobby.v@xcsat.com	2023-03-03 10:05:46 am

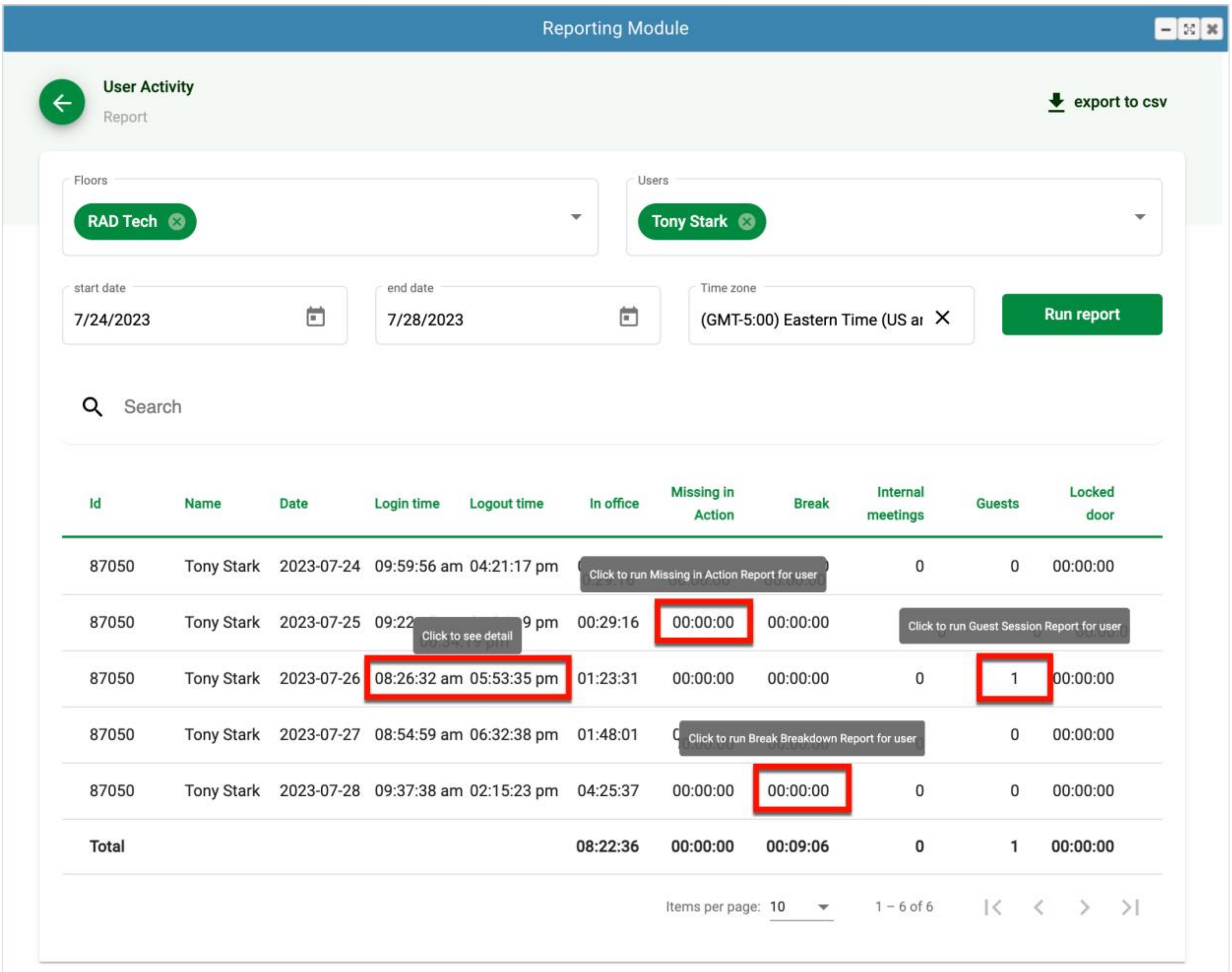


Host	Date	Time	Length	Guest	Title	Company	Email	Phone	Reason for visit
Joe Jacoboni	0000-12-31	7:03:58 pm	00:00:00	Maricarmen			guestqparu...		
Joe Jacoboni	0000-12-31	7:03:58 pm	00:00:00	Alex			guestyy9z9r...		
Joe Jacoboni	0000-12-31	7:03:58 pm	00:00:00	Leon			guest3d8cki...		



Id	Domain	Assigned	Unassigned	Blocked	Total	Subscribed
370	CAMPUS II-UAT	0	0	0	0	0
855	NexGen Call Cent...	7	1	0	8	8
856	NexGen Technolo...	0	0	0	0	0
875	NexGen Call Cent...	1	0	0	1	1

User Activity Report



The **User Activity Report** lists every user for the selected floor(s) along with metrics for that user, such as, in-office time, number of guest sessions, breaks duration, number of internal meetings, and locked door times. This report also has drill-down capability. While hovering over one of the drill-down enabled columns, you can see the detail of the selected user for the selected date.