



 Enable 365

Presence

Your hybrid workplace anywhere

PRESENCE

User Manual

Introduction

Connect, coordinate, and collaborate efficiently with Presence, a Teams and Outlook workforce planning and management app.

Presence is an app for Teams to help you manage the dynamic nature of modern workplaces and optimize resource use.

Empower your workforce to take control, manage, and communicate their work status and location within the organization.

Presence facilitates collaboration and coordination among team members by providing visibility into each other's schedules and work locations. Presence contributes to operational efficiency and ensures smooth communication in any work setting.

This guide describes how to use Presence, an app for Teams.

Good luck!



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Setup

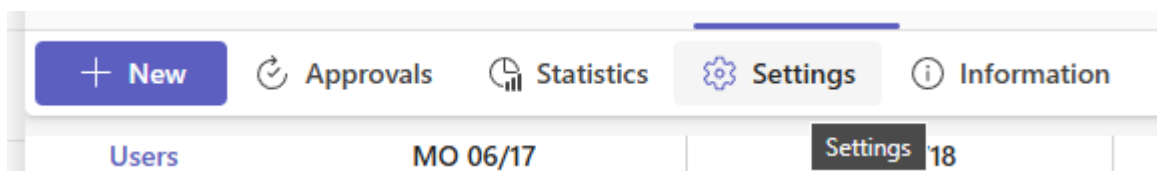
Add Presence as a tab

Go to the Microsoft Teams channel where you want to add Presence, click the plus symbol to add a tab, search for “Presence,” and select **Presence** in the list of available apps.

Manage Settings

Note! Only Team owners can open and manage settings

To open settings, click the “**Settings**” button in the top navigation bar:



Here, you can view and change the following settings:

1. **Categories:** These are the categories available to team members when they register a new presence. You can create a new category by writing it in the “New category” field and pressing enter or clicking the plus button. You can also specify the category's color and whether it requires approval. Some default categories are given in the application's initial setup based on your language.
2. **Approvers:** Here, you can choose team members that will be given the approver role. Approvers can approve requests with categories marked for approval, register presence for other users, and manage other members’ registrations. At least one approver is required if one or more categories are marked for approval.
3. **Notifications:** By enabling the “Teams Activity notifications,” approvers will receive a Teams Activity notification when a user requests approval, and the user receive a notification when approvers process the request.

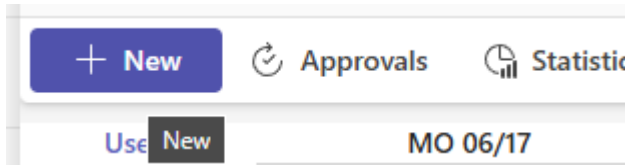
Click the “**Save**” button to save your changes.

Registration

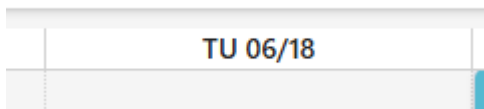
Open a new Registration

There are two different ways to open the form for registration:


1. Click the “**New**” button in the top navigation bar. This will open the form with the current date as default.



2. Click a date header in the main table/overview. This will open the form with the clicked date as default.



Filling out the registration form

1. **User (only for approvers):** Select the user you would like to register on behalf of.
2. **Category:** Select the category for your registration. If the category is marked for approval , an approver must be selected further down in the form.
3. **Date:** Provide the start and end dates for your registration. Toggle the “All day” option off to specify a specific time.
4. **Comment:** Write an optional comment for your registration. This comment will be visible on the registration and to all members and approvers, so avoid writing sensitive information.
5. **Outlook calendar:** Toggling this option will create a copy of the registration as an event in your Outlook calendar. This event will be marked as an all-day event to ensure it does not interfere with your meetings and other scheduled activities.
6. **Approver:** This field will appear if the selected category is marked for approval. Select the user for whom you would like to approve your registration.

If you are an approver and select yourself as an approver, the registration will automatically be approved.

Using Presence

Registrations from you and the other members are displayed in the main table.

Users	MO 06/17	TU 06/18	WE 06/19	TH 06/20	FR 06/21
Adele Vance	Office 06/17 - 06/20				Home
Alex Wilber	Office 06/17 - 06/21				
Diego Siciliani	Home	Office 06/18 - 06/20			Home
Grady Archie	Vacation 06/17 - 06/21				

You can click on the individual registration to view more information.

Diego Siciliani

Home

Mo. 06/17

I'm expecting a package today so will be working from home

Home

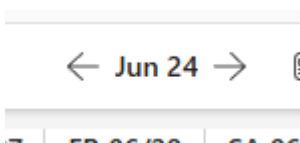
Office
06/18 - 06/20

Diego Siciliani

Navigate

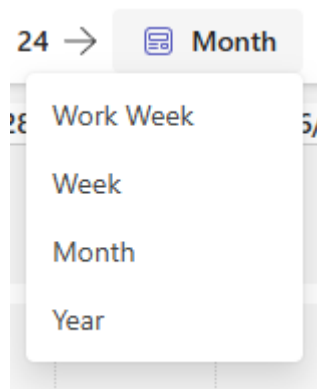
To navigate around the main table, click and drag, use the mouse wheel, or use the scrollbar.

Use the left and right arrow buttons in the top navigation bar to change the current viewed period.



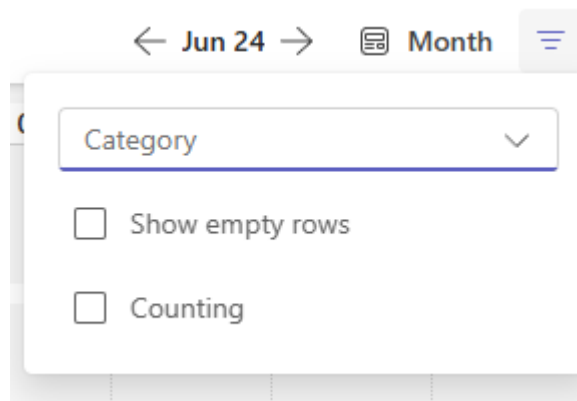
Views

Click the “view” dropdown to change the period interval for the table.



Filtering

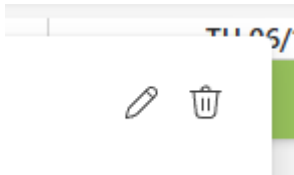
Click the “filter” button to get options for filtering the viewed contents of the table.



1. **Category:** Select specific categories you want to view.
2. **Show empty rows:** Display team members without registrations for the selected period.
3. **Counting:** If checked, the date header will display the number of registrations for the given day. Multiple registrations from the same user will count as one. Use in combination with the category filter to effectively check specific categories.

Edit/Delete Registrations

If you click and view the information of a registration that is yours or has the approver role, the options for edit and delete will appear in the top right corner of the card.



Clicking the edit button will open the registration form in edit mode. If the registration is edited with a category marked for approval, a new approval request will be sent to the selected approver.

Note! Approvers can't edit a registration for another user if the registration is connected to an Outlook event.

Using Presence as a Personal App

Presence can be launched as a personal app inside Microsoft Teams or Outlook.



When using Presence as a personal app, you must select what Team you want to view as. This effectively results in the same experience as using the app from a Team channel.

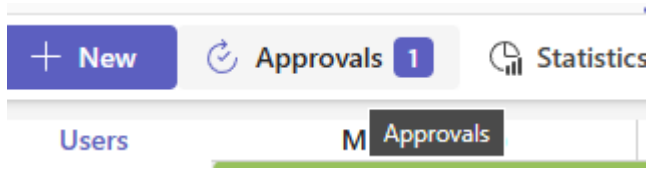
Presence remembers what Team you previously selected, so you won't be asked each time you open the personal app.

Click the "Change Team" button in the top navigation bar to select a different Team.

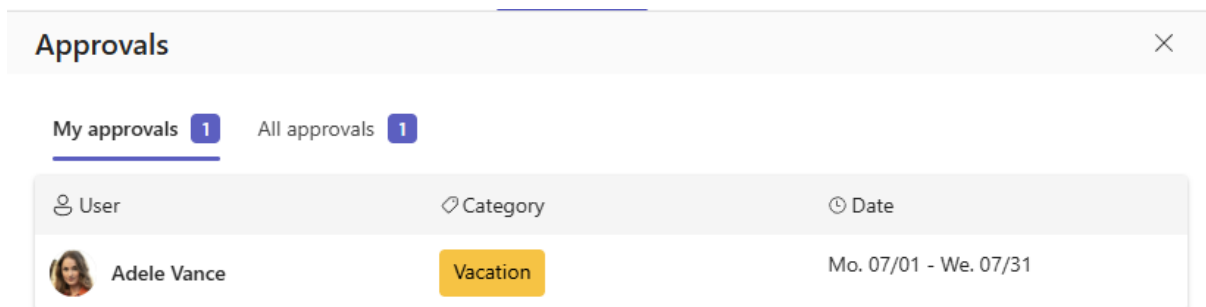
Note! Presence must be set up as a channel tab for the Team before the Team can be selected in the personal app. See the "Setup" section.

Approvals

You will see the “Approvals” button in the top navigation bar if you are an approver. The number on the right represents the requests waiting for your approval.



Clicking the button will open the approval page.



- **My approvals:** The request where you are selected as the approver.
- **All approvals:** All registrations that are waiting for approval. An approver can process all requests, even if another approver is selected.

Clicking a request will open a dialog box with additional information and buttons for approving or rejecting the request. An optional field for feedback is also available and will be displayed to the user.

