



OfficeStatus Web Admin Guide

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1 Introduction



Welcome to the OfficeStatus Web Interface

OfficeStatus provides a robust web interface which system administrators can use to manage and configure the system as a whole. This guide will provide details on the portions of the web interface that are designed specifically for system administrators. For details on the end user (e.g. client) specific sections of the interface, please refer to the web client user's guide.

1.1 Key Metric Software

Key Metric Software is a privately owned software development company located in beautiful Traverse City, Michigan.

At Key Metric Software, our commitment to quality software engineering is driven by an even stronger commitment to customer service and satisfaction. If you have any questions or comments, please feel free to contact us.

For a complete review of our product offerings, please visit our home page.

2 OfficeStatus Concepts

The goal of the OfficeStatus software solution is to provide office status management in a way that is extremely robust, reliable, and accessible.

- **Robustness** - OfficeStatus is secure, scalable, and heavily tested.
- **Reliability** - OfficeStatus was designed and engineered with crash resistance and availability as first-class goals.
- **Accessibility** - OfficeStatus leverages the power of modern web services to create a "Run Anywhere" distributed software platform.

OfficeStatus employs a service oriented architecture and the Microsoft .NET platform to help achieve these goals. The .NET framework allows our development engineers to accelerate the creation of reliable distributed software components and minimize the risk of memory leaks and other undesirable by-products of the software development process.

2.1 Architecture

OfficeStatus is based upon a layered software architecture that provides a high level of flexibility, security, and reliability.

At its core, OfficeStatus is a database driven application. Above that, common management services are

exposed both to local and distributed components, the latter through a web service tier.

A primary advantage of this architecture is that it allows OfficeStatus users to connect to the system via nearly any type of network connection - a LAN, WAN, or even the Internet - without the need for additional firewall configuration. This is true regardless of which client interface the user elects to use.

2.2 Components

OfficeStatus is comprised of the following main components:

- **OfficeStatus Windows Client** - One of two client interfaces available, OfficeStatus Windows Client communicates with OfficeStatus Server through standards-compliant web services.
- **Web Interface** - The web-based interface can be accessed by both end users and OfficeStatus system administrators (the latter will have access to a wide range of administrative features).
- **Web Service** - Provides system connectivity to OfficeStatus Windows Client and a variety of other components.
- **Maintenance Service** - Runs in the background as a Windows service (named "OfficeStatus Maintenance Service"), providing a range of services such as database pruning, email message processing, update checks, and more.
- **Database** - OfficeStatus uses a SQL Server database for relational data storage.

All of these components interoperate to provide a seamless experience to OfficeStatus end users and system administrators alike.

More information about the installation and configuration of these components is available throughout the remainder of this guide.

2.3 Client Interfaces

OfficeStatus provides two separate end user interface options:

1. **OfficeStatus Web Interface** - End users can log into the OfficeStatus web interface via the same web address (URL) as Administrators use. Normal users will not have access to any administrative functions through the web interface.
2. **OfficeStatus Windows Client** - End users can install and use the OfficeStatus Windows Client on their computer for an even richer experience.

Note that OfficeStatus users can switch freely between these two user interfaces as needed. For example, a user may have OfficeStatus Windows Client installed on their office workstation for the richest possible experience (more on this in a moment), but then elect to log into the OfficeStatus Web Interface when they're traveling with a company laptop (or working from a home computer).

Regardless of which interface your end users employ, they will have a rich and highly interactive experience. However, each interface has its own distinct advantages:

OfficeStatus Windows Client:

- Can run automatically when Windows starts up, with optional auto-login capability.
- Runs within the user's Windows notification area (e.g. system tray) for extremely convenient access.
- Provides rich (and configurable) status watch and note arrival pop-up notifications.
- Allows for a richer overall user experience (typical of desktop applications).
- Offers smart "auto-sensing" technology that can detect an end user's status based upon activity or environmental events.

OfficeStatus Web Interface:

- Requires no software component installation on the end user's computer (they use their existing web browser).
- Allows end users to configure their own contact information (OfficeStatus Windows Client does not).
- Can work with any operating system that has a supported web browser installed.
- Provides a more immediate, real-time view of underlying data (OfficeStatus Windows Client relies more heavily upon caching).
- Needn't be upgraded separately when new versions of OfficeStatus are released.

2.3.1 OfficeStatus Web Interface

OfficeStatus provides an advanced web-based interface interface that encapsulates both end user (client) *and* administrative functions. It is one of the two client interfaces available to OfficeStatus users.

When a user that is a member of the SystemAdmin role logs into the OfficeStatus web interface, he or she will be afforded access to special Administrative functions not available to normal (non-admin) users. Details about these administrative functions can be found in the remainder of this help guide.

Normal (non-admin) end users can also log into the OfficeStatus web interface, but they will not have access to any administrative functions.

2.3.2 OfficeStatus Windows Client

OfficeStatus Windows Client is a powerful, user-friendly desktop application that can be installed on an end user's computer. It is one of the two client interfaces available to OfficeStatus users.

To learn more about how OfficeStatus users engage with OfficeStatus Windows Client, please consult the help file that installs with it (client software downloads are available on our product website).

Information on deploying OfficeStatus Windows Client can be found in our deployment guide.

Windows Client Data Caching

In order to mitigate some of the expense associated with operating within a distributed, service-oriented architecture, OfficeStatus Windows Client selectively *caches* data elements (those that change infrequently) received from the server.

Examples of the type of information cached by the client includes the current list of available statuses, the most recent department listing, status comments, and more. The length of time for which such items are cached depends upon the semi-static cache setting within the client software (by default set to 15 minutes).

The primary benefits of client-side data caching include better performance and lighter network load. But keep in mind that client installations may not immediately reflect changes made to the data items mentioned above.

3 Installation

OfficeStatus Server has been designed and engineered with ease of deployment as a first-class objective.

Please see the following topics:

- Deployment Guide - provides access to the online deployment guide, which discusses deployment considerations in depth.
- Upgrading - discusses OfficeStatus product upgrade considerations.

3.1 Deployment Guide

A separate OfficeStatus installation and deployment guide has been developed and published on the web. The OfficeStatus Deployment guide covers topics such as:

- Deployment concepts
- Server requirements
- Client requirements
- Server installation
- Client installation
- Troubleshooting

Please visit the support section of our product web site for access to the deployment guide:

<http://www.officestatus.com/support/>

3.2 Upgrading

As discussed in the Components section of this guide, the OfficeStatus software solution is comprised of components that are installed either on the server or client side.

When upgrading your OfficeStatus deployment, a key consideration is the version compatibility of the server and client side components. OfficeStatus takes a simple and effective approach to this issue, outlined below.

- When the major / minor component version numbers are **different**:
 - OfficeStatus Windows Client **cannot** communicate with an older version of OfficeStatus Server.
 - OfficeStatus Windows Client **can** communicate with a newer version of OfficeStatus Server.
- When the major / minor component version numbers are the **same**:
 - Client and server components can communicate freely.

The reasoning behind this approach is straight-forward: certain features within OfficeStatus Windows Client require communications level support within OfficeStatus Server. Changes that could potentially impact communications compatibility between client and server components are only ever made in new major / minor version releases.

Versioning

All OfficeStatus software components have a four-part version number associated with them. The sections of the version number correspond to the major, minor, revision, and build numbers (respectively).

For example, if the OfficeStatus Windows Client version (exposed through Help | About in the main menu) is **1.5.3.5**, the major version number is 1, the minor version number is 5, the revision number is 3, and the build number is 5.

Client and server side components ***within the same major / minor version*** will always be compatible with one another.

Upgrade Version Rule

This information can be distilled into the following simple rule:

When upgrading to a **newer** major / minor version (e.g. 1.0.x.x to 1.5.x.x), upgrade OfficeStatus Server ***first***, then upgrade OfficeStatus Windows Client installations.

Upgrading OfficeStatus Server

When upgrading your OfficeStatus solution deployment, we recommend the following steps:

1. Backup your OfficeStatus database
2. Execute the new version installer on the OfficeStatus Server host computer

The first step (backing up your existing OfficeStatus database) is certainly optional, but highly recommended. Once the upgrade process starts, the installation process may need to upgrade OfficeStatus database schema (and / or data) to support the newer release.

Upgrading OfficeStatus Windows Client

To upgrade OfficeStatus Windows Client to a newer version, perform the following actions on the end user's workstation:

1. Shut down (terminate) OfficeStatus Windows Client
2. Execute the newer version installation program

When the installation begins, it will automatically un-install the previous version of OfficeStatus Windows Client first, and then install the latest version.

Note: During the OfficeStatus Windows Client upgrade process, certain user interface customizations may be reset in order to ensure the availability of new functionality.

4 Getting Started

Once you have OfficeStatus Server installed, the next step is to log in with the built-in administrative account and begin configuring the system.

At a minimum, you'll generally need to add one or more OfficeStatus user accounts so that your organization's employees can have access to the system. You may also wish to add one or more departments and / or locations, to better reflect the structure of your organization and partition your OfficeStatus users into logical groups.

To access the web-based OfficeStatus web interface, open a web browser and navigate to the URL that you selected during OfficeStatus Server installation (example: <http://www.yourdomain.com/officestatus/>). The OfficeStatus Server installation process will have created a shortcut on the desktop of your server computer to provide quick access to this URL. You will be presented with an authentication dialog box,

at which point you'll need to log in.

4.1 Logging In

To log into the OfficeStatus web-based administrative interface and gain access to the administrative features, access the OfficeStatus web-based interface and enter the OfficeStatus administrator username and password that you specified during the server installation process.

It's important to note that any OfficeStatus user can log into the web interface, but only OfficeStatus users that are members of the SystemAdmin security role will have access to administrative features.

Note that it is possible to further secure access to the OfficeStatus web-based interface through SSL (Secure Sockets Layer, a security mechanism that operates at the data transport layer). See the Server Security topic within this help guide for additional information.

Note: If an OfficeStatus administrator remains inactive within the administrative interface for an extended period of time, their authentication session will expire, and they will be required to log in again.

4.2 Navigation

Once you have successfully logged into the OfficeStatus web-based administrative interface, you will be presented with your OfficeStatus user home page. This is the same home page that normal (non-administrative) users will see when they log in, but with additional information and navigation options specific to administrators.

When logging in as an administrator, the primary navigation menu that appears at the top of the screen will have a special "Administration" entry. Hover over this menu entry (and those beneath it) to reveal a broad range of administrative features and functions, which will be described throughout the remainder of this help guide.

You can also log out of the web interface at any time by clicking the "Log out" link that appears near the top-right of all pages.

5 Security

OfficeStatus employs a simple security model in which an OfficeStatus Administrator defines one or more users and optionally assigns them to one or more departments and / or security roles.

These concepts are further elaborated in the remaining sections of this help guide.

5.1 Users

Users form the basis of the OfficeStatus security model and have a number of important attributes that directly impact their level of access to the system. Departments and security roles work together to further extend the capabilities of the user account. For example, assigning a user to the "Accounting" department and making them a member of the "DeptManager" role will allow that users to manipulate change the statuses of other users in the same department.

Generally speaking, each member of your organization that will interact with OfficeStatus (via OfficeStatus Windows Client or through the web interface) will need their own user account.

Departments will often be configured to reflect the logical structure of your organization, but this is not a strict requirement. You can use departments to group users in whatever way you need.

5.1.1 Listing Users

Navigating to *Administration >> Security >> Users* in the OfficeStatus web interface will reveal a listing of users defined within the system.

As the number of users within the system grows, the listing will be separated into distinct pages with each page being accessible via a small numeric page number indicator near the bottom of the list. You can click these page numbers to navigate from one page to the next.

Each row of the on-screen user listing grid contains summary information about an OfficeStatus user, as well as hyperlink that can be used to edit the user account.

You can also use the controls within the Display Filter group box (near the bottom of the user listing page) to restrict which users are shown by default. You can filter by a variety of criteria (such as location or user name), and can further elect to hide disabled users by de-selecting the correlating checkbox.

See also:

- Creating Users
- Editing Users
- Removing Users

5.1.2 Creating Users

To create a new OfficeStatus user, navigate to the user listing page and click the New User button. You will be taken to the user editor screen, where the properties of the new user can be configured.

Note that when creating a new user, only the "general" tab of the user editing screen will be enabled at first. Once you've provided the basic account configuration elements required clicked the "Save Changes" button, the remaining user editor tabs will be enabled.

5.1.3 Editing Users

The OfficeStatus user editor screen is divided into four separate areas, each accessible via the tabs near the top of the screen.

- General properties
- Addresses
- Phone numbers
- Departments

Note that when creating a new user, only the "general" tab will be enabled at first. Once you provide the basic account configuration elements required on the general tab and click the "Save Changes" button, the remaining user editor tabs will be enabled.

5.1.3.1 General User Properties

Primary Attributes

This page contains general user properties, as follows:

- **Username** - The OfficeStatus account username with which the user will log into the system.
- **First name** - User's first name.

- **Last name** - User's last name.
- **Job title** - User's job title or description. Optional.
- **Email address** - Email address for the user. Optional, but recommended.
- **IM address** - User's instant messaging address. Optional.
- **Created** - This is a read-only account creation date / time stamp.
- **Location** - Specification of the user's location. Optional.
- **Reports to** - Select the user to whom this user reports. Optional.
- **Public notes** - Notes about the user, viewable by other OfficeStatus users. Optional.
- **Work schedule** - Describes the user's work schedule (see below for details). These values default to those of the site-wide work schedule.
- **Manage user image** - Click the hyperlink to upload and manage an image associated with this user. Optional.

Work Schedule

OfficeStatus maintains work schedule information for each user within the system, which it then uses to assist users with a number of tasks such as changing their status within the system (for example, OfficeStatus provides helpful "due back" date / time shortcuts based upon the user's work schedule information).

The default settings of the user's work schedule are derived from the site work schedule, so you may often find it useful to configure the site-wide schedule prior to adding users.

Security

To set the **password** for a user, you must check the "Set password to" checkbox and then enter a password (along with a confirmation entry in the adjacent field). Note that, for security reasons, user passwords are **never** displayed within the OfficeStatus web interface. In fact, there is no means by which you can read the password of an existing OfficeStatus user - it can only be changed.

Additional security related options include the following:

- **Require password match** - When this option is *disabled* (unchecked), the associated user will be able to authenticate to this account with *any password, including a blank one*. If you are not concerned with securing an individual OfficeStatus user account, uncheck this box and the user will not be required to enter a password.

IMPORTANT: Use of this setting is **not generally recommended**, particularly for OfficeStatus Server installations that are accessible via the Internet. Please carefully consider the security implications of using this option carefully when configuring it.

- **Allow client to remember password** - When checked, OfficeStatus users will have the option of engaging the "remember password" option within their OfficeStatus Windows Client installation. This has the effect of logging them in automatically. Note that (for security reasons) users of the web-based OfficeStatus interface will *never* have a "remember password" option available to them.
- **Allow client to change password** - When checked, OfficeStatus users will be able to change their own password from within the user preferences screen of OfficeStatus Windows Client or the web-based interface.
- **Account enabled** - Disabling an OfficeStatus user account means that the associated user will not be allowed to authenticate with OfficeStatus Windows Client. Note that OfficeStatus users cannot be deleted from the system - they can only be disabled.

- **Hide user's status from other users** - Users that have this option set do not appear in the user status listings of OfficeStatus Windows Client installations. Note that a hidden OfficeStatus user will **still be able to see themselves** within the OfficeStatus Windows Client and web client interfaces, but they will be invisible to *other* users.

Click the Save Changes button near the bottom of the screen to commit any modifications you've made to the user profile attributes listed above. Click the Cancel button to abandon any changes and return to the user listing screen.

Note: The built-in OfficeStatus Administrator account (created during the server installation process) cannot be disabled.

5.1.3.2 User Addresses

The Addresses tab of the OfficeStatus user editor screen provides a means of managing address information for the associated user.

Any number of addresses may be associated with an OfficeStatus user account. The Addresses tab displays a complete listing of defined addresses for the associated user. Existing addresses may be edited or deleted via the hyperlinks that appear on each row of the address listing grid. Click the Add Address button to add a new address for the user being edited.

When editing an address (or creating a new one), the Address Editor screen will appear. Most of the fields that comprise this screen are self explanatory, but a couple deserve elaboration:

- **Address type** - Select the address type being entered. Address types are defined within the address types section of the system configuration menu.
- **Notes** - Additional information about the address being entered, accessible to other OfficeStatus users.
- **Primary address** - Check this box to indicate this address as the primary one for the user being edited. The primary address for a user is sorted to the top of the screen in various OfficeStatus reports and address listings.

Click the Save button to commit changes, or Cancel to abandon changes and return to the User Address listing.

5.1.3.3 User Phone Numbers

The Phone Numbers tab of the User Editor screen functions in a manner very similar to the Addresses tab. It provides a listing of phone numbers associated with the OfficeStatus user.

Existing numbers may be edited or deleted via the hyperlinks that appear on each row of the phone number listing. Click the Add Phone Number button to add a new entry for the user being edited.

The Phone Number Editor screen is comprised of the following fields:

- **Phone number** - Optional telephone number. May be entered in whatever format you prefer.
- **Extension** - Optional telephone extension.
- **Type** - Select the type of phone number being entered. Phone Types are managed within the phone types section of the system configuration menu.
- **Primary phone** - Check this box if the number being entered is the primary phone number for the associated user. The primary phone number is exposed with user status listings of the Windows and

web client interfaces, and also sorted to the top of reports and phone number listings.

Click the Save button to commit changes, or Cancel to abandon changes and return to the Phone Numbers listing.

5.1.3.4 Department Membership

The Departments tab of the User Editor provides a quick means of identifying which departments a user is associated with. An OfficeStatus user may be a member of any number of departments.

To make the current user a member of one or more departments, select them from the list of available departments. Click the Add button, and the selected departments will now appear within the "Member Of" listing. Reverse the process to remove the current user from one or more departments.

Tip: You can select multiple departments at once by holding down your keyboard's Ctrl key which clicking them with your mouse.

5.1.3.5 User Images

The OfficeStatus user editor allows you to (optionally) associate an image with any user in the system. When available, user images are displayed within the OfficeStatus client interfaces (to end users) as part of the account's contact information.

To manage a particular user's image, click the User Image hyperlink from the General User Properties screen of the user editor. You will be presented with a preview of the current user's image, if one already exists.

To associate a new image with the user being edited, first click the Browse button to locate an image file on your computer's file system. Supported image file types include *.gif*, *.png*, *.jpeg*, and *.jpg*. If you wish to use an image file of another type, you must first convert it to a supported type using your preferred image editing software.

Once you've located an image file on your system to associate with the user being edited, optionally enter some descriptive text into the Description field and click the Save / Upload button.

Note: The maximum image file size allowed is controlled via a setting on the System General Configuration page.

If you wish to remove the current image assigned to a user, click the Delete Image button.

5.1.4 Removing Users

OfficeStatus users cannot be permanently deleted from the system - rather, they can be **disabled**. To disable a user within OfficeStatus, edit the user's account and clear the "Account enabled" checkbox. Then click the "Save Changes" button to commit the change.

When an OfficeStatus user account is disabled, it is effectively ignored by the system as a whole and does not consume any portion of the currently installed OfficeStatus license. By default, disabled accounts are shown in the user listing area of the web-based administrative interface - you can change this behavior by clearing the "Show disabled users" checkbox on that page.

Note: The lack of a direct user deletion capability is not an oversight, but a design decision made during

the development of OfficeStatus. Disabling accounts (rather than deleting them) reduces the likelihood of accidental data loss associated with the underlying relational database structures that support OfficeStatus, and also helps to maintain data continuity within the distributed OfficeStatus component architecture.

5.2 Departments

OfficeStatus Departments are used to create logical groups of OfficeStatus users. OfficeStatus client interfaces can then filter user status listings by departments, often making their interaction with the system more efficient and intuitive.

Navigate to *Administration >> Security >> Departments* to view the current list of departments defined within the system (if any). Each row in the department listing has an Edit and Delete hyperlink associated with it. Click the New Department button (near the bottom of the department listing) to create a new department.

Editing Departments

When editing (or creating new) departments, the department editor window appears. Use the fields on-screen to provide a name and description for the department, along with any public notes that you wish to associate with it.

Note: The contents of the department description field will be visible to OfficeStatus Windows Client users if they hover over a department tab with their mouse.

Department Membership

Once the core properties for a department have been defined and **saved**, you can click the Members tab (near the top of the screen) to assign OfficeStatus users to the department.

OfficeStatus users can become members of as many departments as you need. Within the OfficeStatus client interfaces, users can filter the contents of the user status board listing by selecting a department.

Note: OfficeStatus Windows Client installations (that are currently running on users' desktops) will not immediately reflect the addition or removal of OfficeStatus Departments. The precise latency depends upon the semi-static cache setting within OfficeStatus Windows Client (see the client user guide more info), which defaults to refreshing every 15 minutes.

5.3 Locations

Locations are an additional unit of user-level organization supported by OfficeStatus. They are designed to support the distribution of office members into multiple geographical locations, but could also be used to represent office teams or other logical groupings that are semantically distinct from departments.

Within OfficeStatus Windows Client, you can view the users of a specific location by selecting that location from the drop-down box contained within the main window toolbar. A similar level of functionality exists within the status board section of the OfficeStatus Web Interface.

Navigate to *Administration >> Security >> Locations* to view a listing of locations that have been defined to date (if any). Each row in the location listing has an Edit and Delete hyperlink associated with it. Click the New Location button (near the bottom of the location listing) to create a new location.

Editing Locations

When editing (or creating new) locations, the location editor window appears. Use the fields on-screen to provide a name and description for the location, along with any public contact information that you wish to associate with it. The location contact information will be visible to end users when they view contact information for any user (in a separate "location" tab of the user contact information window).

Assigning Users to Locations

To assign users to a specific location, use the User Editor screen.

5.4 Security Roles

A primary goal when designing OfficeStatus was to keep the security model simple, yet robust.

Each OfficeStatus user may be assigned to one of the following pre-defined security roles:

- **SystemAdmin** - Members of this role have access to every functional area in the system, and can maintain the system (e.g. manage users, departments, system settings, etc.) as a whole. They can also change the status of any user within the system.
- **Receptionist** - Members of this role can modify the status of any user defined within the system.
- **DeptManager** - Members of this role can modify the status of any user in the same department(s).
- **ReportViewer** - Members of this role can view reports without data limitations, but are otherwise normal users.

Normal users (those not part of any Security Role) can modify their own status and view the status / contact information of others.

OfficeStatus users can be members of more than one role, in which case the permissions are effectively combined. For example, a user may have the role of both DeptManager and ReportViewer, allowing them to manage the status of users within their department but view full status history report data for any user.

Security Role Membership

To manage security role membership, navigate to *Security >> Roles* and select a role from the list that appears. Doing so will allow you to add and remove users from the selected role.

Note: The built-in OfficeStatus Administrator account cannot be removed from the SystemAdmin security role.

5.5 Server Security

When installing OfficeStatus Server on a host computer, it's important to consider the accessibility of that host to potential threats. This principle applies, of course, to any server software product.

If your OfficeStatus Server installation will be accessible via the Internet (e.g. is available via a publicly accessible IP address or domain name), you may wish to consider taking additional security precautions. Options include (but are not limited to):

- Ensuring use of the Require Password Match option on all OfficeStatus user accounts.

- Using strong passwords during OfficeStatus user account creation and Active Directory user import.
- Dis-allowing OfficeStatus user account selection during client login operations.
- Limiting the accessibility of your OfficeStatus Server host via corporate firewall configuration (e.g. based upon client IP address, for example).
- Using SSL to secure the communications between OfficeStatus Windows Clients and OfficeStatus Server. See below for additional information.

Each of these options should be considered individually based upon your environment, the perceived sensitivity of data managed by OfficeStatus Server components, and your infrastructural capabilities.

Using SSL with OfficeStatus

OfficeStatus Server and OfficeStatus Windows Client both support the use of SSL to encrypt communications between the client and server components. SSL can also be used to provide additional security during user interactions within the web-based interface.

To use SSL with OfficeStatus, you must take the following steps:

Step 1 - Secure the OfficeStatus Server website or virtual directory

All communications between OfficeStatus Server and OfficeStatus Windows Client components occur via web services. Using SSL to secure these communications therefore requires the installation of an SSL certificate on the OfficeStatus Server web host.

During the OfficeStatus Server installation process, a host IIS (Internet Information Services) website is specified, along with an optional virtual directory. Open the Internet Information Services management console and review the properties associated with the website or virtual directory that was created during the installation of OfficeStatus Server. On the Directory Security tab, click the Server Certificate button.

The remainder of the IIS certification installation process is well documented within IIS itself. Using the IIS documentation as a guide, acquire (or generate) and install a valid SSL certificate into the OfficeStatus Server website or virtual directory.

Step 2 - Modify OfficeStatus Windows Client configurations to use SSL

When a user logs into OfficeStatus Windows Client, they have the opportunity to specify a service address which corresponds to the OfficeStatus Server web service interface location. Generally this address will be in the form of:

`http://yourdomain.com/OfficeStatus`

Note: The exact web service address depends upon choices made during the OfficeStatus Server installation process.

In order to use SSL to encrypt communications between OfficeStatus Windows Client and OfficeStatus Server components, change the service address prefix to use **`https`** instead of **`http`**. For example, the newly secured service address might look something like:

`https://yourdomain.com/OfficeStatus`

If the OfficeStatus Server IIS SSL certificate is installed correctly, OfficeStatus Windows Client will operate normally with the secured service address. If you receive errors during client / server

communications, please troubleshoot your IIS configuration accordingly.

Step 3 - Use the new secure web address when logging into the web interface

Users (including system administrators) logging into the OfficeStatus web interface can also now use the *https* address prefix (rather than the *http* prefix) for added security.

6 System Configuration

OfficeStatus system administrators (members of the SystemAdmin role) have the ability to configure key system settings through the web-based administrative interface.

The following configuration areas are available:

- General configuration
- Email configuration
- Logging configuration
- Alert configuration
- Database Maintenance
- Phone Types
- Address Types

6.1 General Configuration

The following general configuration options are available:

- **Check for Updates** - Allows OfficeStatus to periodically check to see if a newer version of itself is available. An alert will be created if a newer version is available. Note that you can also manually check for newer version availability via the Help | About screen.
- **Database Connection String** - The database connection string that OfficeStatus uses to connect to the back end application data store. Please use extra caution when considering a change to this value. Note that the adjacent Test button can be used to test a change to this value prior to committing it via the Save button.
- **Maximum User Image File Size** - Prevents system administrators from uploading user image files that exceed a certain maximum size.
- **Allow User Selection During Client Login** - When enabled, OfficeStatus Windows Client users will be allowed to select from a list of available usernames during login. Consider disabling this capability for added security on Internet accessible OfficeStatus Server installations. Please see the Server Security topic for additional tips on securing your OfficeStatus Server installation.

6.2 Company Info

Information about your organization can be entered by an OfficeStatus system administrator via the *Administration >> System >> Company Info* menu item.

- **Company Name** - If defined, the Company Name is displayed in the title bar of OfficeStatus Windows Client installations and in the header of the web interface.
- **Contact Information** - If defined, the contents of this field are displayed whenever a user's contact information is viewed.
- **Policy Information** - If defined, the contents of this field are displayed whenever a user's contact

information is viewed.

6.3 Email Configuration

OfficeStatus has the ability to integrate with your email server (via the SMTP protocol) to communicate the occurrence of special events and status information.

In order to take advantage of this integration, you must provide OfficeStatus server with details about your mail server.

- **SMTP Server** - Outgoing mail server that supports SMTP for delivering notification email. If you don't want OfficeStatus to send notification email, leave this blank.
- **SMTP Username** - If your SMTP server requires authentication to send outgoing email, enter the account name to use. Otherwise, leave this blank.
- **SMTP Password** - If your SMTP server requires authentication to send outgoing email, enter the password here. For security reasons, this field always appears blank. You must click the checkbox above this field in order for the password to be committed.
- **From Address** - The email address from which messages will appear to be sent. Note that any bounces resulting from delivery failures will be returned to this address.
- **From Name** - The name from which messages will appear to be sent.
- **Delete Queued Outbound Emails When** - Here you can determine when outbound email messages should be deleted from the application database queue.

OfficeStatus email integration settings are employed by other areas of the application, including Alert Config, Send Feedback, and others.

Email integration is managed and executed by the OfficeStatus Maintenance Service.

6.4 Logging Configuration

The OfficeStatus server components can log a variable amount of information about its internal workings out to log files.

Log files will be output by two distinct components into two distinct locations:

- The OfficeStatus Maintenance Service will write log files into "bin/logs" (beneath your installation root folder).
- The OfficeStatus web components (including the web administration interface and the web service components) will write log files into "webroot/logs" (again, beneath the installation root folder).

All logging areas are managed by the settings on the Logging Config page.

- **Minimum Logging Level**
 - None - logging is disabled.
 - Informational - outputs verbose logging information; generally useful only during debugging procedures.
 - Warning - creates log entries when warning conditions occur (e.g. login failures, etc.). This is the default.
 - Error - creates log entries when error conditions occur.
- **Remove Log Files Older Than** - Log files will be deleted automatically after this many days. Set to

0 to keep log files around forever.

6.5 Alert Configuration

Alerts are generated automatically by OfficeStatus in response to key system events. The following alert related options are available:

- **Daily Summary Emails** - OfficeStatus can send an alert summary email message out once a day to an email address specified above. Messages are sent only if alerts exist and only if email integration is properly configured.
- **Maximum Number of Alerts** - The maximum number of alerts to retain in the system. When the count reaches this maximum, the oldest alerts will be deleted. Set this to 0 to never delete alerts automatically (not recommended).

To review alerts generated by the system, see the System Alerts screen.

6.6 DB Maintenance

Like many distributed enterprise applications, OfficeStatus relies on a back-end database to store its application data.

The settings available on the DB Maintenance screen help to keep the OfficeStatus database in good operational order. Note that data pruning strategy is particularly important if you're using a "lightweight" database engine such as MS SQL Server Express 2005 or MSDE where a maximum database size exists.

- **Prune User Status History After** - User status change history will be retained for this many days for each user in the system. Impacts the amount of information available in the "Status History per User" report (accessible from within OfficeStatus Windows Client).
- **Prune Deleted Notes After** - When notes are deleted by users, they aren't removed from the database immediately. This setting allows you to (permanently) prune these deleted notes to conserve database space.
- **Auto-Delete Old Notes After** - Sometimes users fail to delete notes in a timely manner, causing the database size to grow. This option automatically flags old notes as deleted after a specified number of days, at which point they will become available for pruning. Also note the option to delete only old notes that have been read (recommended).

Database maintenance settings are enforced and executed by the OfficeStatus Maintenance Service.

6.7 Phone Types

Each user phone number in the system has a phone type associated with it. You can add to the list of system provided (built-in) phone types via the Phone Types configuration screen.

A phone type entry is comprised of two key attributes: a name and a description. A number of common phone types (such as "Mobile" and "Home") are available by default. The "Office" phone type is built in, and cannot be removed (it serves as the default for all user phone number entries).

From the listing of Phone Types that appears on-screen, you may elect to Edit or Delete an entry using

the hyperlinks contained within each row. Or you can use the New Phone Type button to create a custom phone type.

6.8 Address Types

Each user address defined within the system has an address type associated with it. You can add to the list of system provided (built-in) address types via the Address Types configuration screen.

An address type entry is comprised of two key attributes: a name and a description. The "Office" address type is built in, and cannot be removed (it serves as the default for all user address entries).

From the listing of Address Types that appears on-screen, you may elect to Edit or Delete an entry using the hyperlinks contained within each row. Or you can use the New Address Type button to create a custom address type.

6.9 Site Work Schedule

The OfficeStatus site-wide work schedule provides a *default* work schedule for users within the system.

Work schedule information is then used by the system to provide assistance and information to other users. For example, the Assist button in the User Status Change window uses work schedule information to provide a number of intuitive return time shortcuts.

A work schedule is comprised of a series of working days, as well as a daily schedule (start and end times, as well as lunch hour definition).

If a user has not yet set their work schedule, it will default to that of the site-wide schedule. Once a user's work schedule is set, it will no longer be affected by changes to the site-wide work schedule. If you want to modify a user's work schedule directly, you can do so from within the User Editor.

7 Status Configuration

At the core of the OfficeStatus software system is the concept of *user status* - a simple, clear indication of the availability of an OfficeStatus user.

Each organization is different in terms of what level of status granularity it needs or prefers. For example, one organization using OfficeStatus may simply wish to know when users are "in", "out", or "unavailable" - with little regard for when the user is due back, what it is they're doing, etc. Another organization, however, may place considerable value on a more precise evaluation of user status - they may need to know that a specific user is at lunch and will return in an hour, for example, and how to reach this user while he or she is away.

OfficeStatus accommodates the wide range of status tracking needs described above through the use of status types and custom statuses.

- Status types - every status defined within the system is derived from one of three **core** statuses - "In", "Out", and "Unavailable". For example, a status of "At Lunch" will generally have a status type of "Out".
- Custom statuses - an organization using OfficeStatus can define as many custom statuses as they need.

In addition, there are three built-in statuses that reflect the core status types discussed above - "In", "Out", and "Unavailable". These built-in statuses are *always* available - they cannot be deleted or changed, even by OfficeStatus system administrators.

The primary status indication of a user is combined with other, optional status attributes (available from within OfficeStatus Windows Client during user a status change) such as *Due Back* and *Status Comments* to allow for considerable overall flexibility in how the system is used.

7.1 Statuses

Status Properties

The primary status of an OfficeStatus user is defined as:

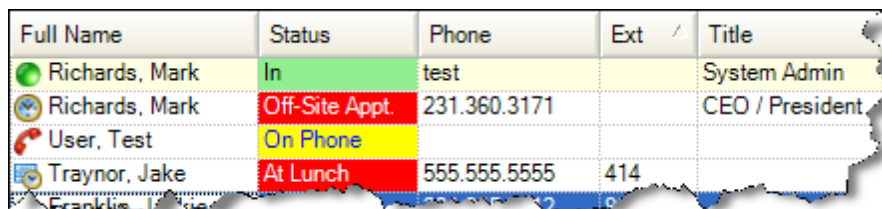
- A short, descriptive name - such as "Unavailable" or "At Lunch"
- A status type ("In", "Out", or "Unavailable") - described in more detail here
- A status image - a small (16x16) status indicator icon in GIF format

To manage the statuses available to OfficeStatus users, navigate to *Status >> Statuses*. A listing of existing statuses will appear, along with Edit and Delete action buttons for each.

Editing a status (or creating a new one) will cause the Status Editor screen to appear. The editor allows you to specify the status name and type (see above) and select a status image.

Status Images

Note that status images are reflected directly within the OfficeStatus Windows Client user interface (see screen shot below), so it's generally desirable to choose an image that is strongly representative to the status being edited.



Full Name	Status	Phone	Ext	Title
Richards, Mark	In	test		System Admin
Richards, Mark	Off-Site Appt.	231.360.3171		CEO / President
User, Test	On Phone			
Traynor, Jake	At Lunch	555.555.5555	414	
Franklin, J...				

Status images, as shown within OfficeStatus Client

You can easily add your own custom status images to OfficeStatus. To do so, follow these steps:

1. Develop or acquire a 16x16 status image in GIF format - the image *must* be this size and format. The image also cannot be larger than 10KB in size or it will not be loaded.
2. Place the image in the *statusimages* folder - this is located beneath the *webroot* folder of your OfficeStatus server installation path.

Once you've taken the steps above, the new status image will immediately become available for selection within the status editor.

Note: changes made to statuses may not be reflected immediately in OfficeStatus Windows Client installations due to client-side data caching. See the OfficeStatus Windows Client help topic for additional details.

7.2 Staus Colors

As described in the introduction to this chapter, there are three core status types within OfficeStatus, from which all other statuses are derived - "In", "Out", and "Unavailable".

In the Status Colors screen, you can set the foreground and background color for each of the three major status types. Status colors help to further convey status information to end users - by default, the following color schemes are used:

- **In** - black text on a light green background
- **Out** - white text on a red background
- **Unavailable** - blue text on a yellow background

Again, the colors you define will be applied to the major status types *and any custom statuses that derive from them*.

The selected color set will be used within OfficeStatus Windows Client when displaying status names. See the screen shot on this page for an indication of how this looks within the client software.

7.3 Status Comments

Status Comments are simple, descriptive snippets of text that OfficeStatus Windows Client users can access during status change operations. They are designed to provide an easy means of extending the amount of information available relative to the status of a user.

Status Comments will appear within the Comments column of the OfficeStatus Windows Client user interface:

Full Name	Status	Phone	Ext	Title	Due Back	Comments
Richards, Mark	In	test		System Admin		
Richards, Mark	Off-Site Appt.	231.360.3171		CEO / President	11:10 AM	At appointment with doctor
User, Test	On Phone				7/25/2006 1:15 PM	in client project status teleco...
Taylor, Jake	Out	555 555 6555			11:13 AM	On call...

Note that during status change operations within OfficeStatus Windows Client, the user can any enter any text they wish. Status Comments are simply a shortcut - the user can click a Status Comments button and choose from any available pre-defined comments that might be appropriate for your organization.

Note: changes made to status comments may not be reflected immediately in OfficeStatus Windows Client installations due to client-side data caching. See the OfficeStatus Windows Client help topic for additional details.

8 Tools

OfficeStatus provides a range of tools to help you manage the system.

- Active Directory User Import
- System Alerts
- Send Feedback

8.1 Client Settings

OfficeStatus allows system administrators to manage (and optionally "lock down") default client settings.

Client settings are those that impact the behavior of the end user client interfaces. Settings can apply to:

- Only the web client interface
- Only the Windows desktop client interface (OfficeStatus Windows Client)
- Both the web and Windows client interfaces

You may find that certain settings, such as those related specifically to the startup behavior of OfficeStatus Windows Client, cannot be manipulated from this administrative page. In such cases, the setting in question usually must be accessible prior to the client program having access to the OfficeStatus service, and therefore must exist in a context that is local to the end user. In the case of OfficeStatus Windows Client, such settings are generally stored in the Windows registry, or in component-specific configuration files on disk.

Important: Changes made through the administrative Client Settings page will not impact currently logged in users. Users must log out and back in again to be affected.

To manage client settings, navigate to *Administration >> Tools >> Client Settings* in the main menu. The resulting page will be separated into a number of categories (represented on screen as tabs), as follows:

General

General client settings include:

- Initial department selection - Controls which department is initially selected within the User Status Board (web interface) or the main application window (Windows Client).
- Initial location selection - Controls which location is initially selected within the User Status Board (web interface) or the main application window (Windows Client).
- Visual theme - Sets the visual client theme. Applies only to OfficeStatus Windows Client.
- Highlight user in user status grid - When engaged, highlights the current logged-in user within the User Status Board (web interface) or the main application window (Windows Client).

Status Events

Within OfficeStatus, status events refer to the system's ability to respond to certain environmental changes (such as a user logging in or out) with a change in user status.

The following status events are specific to OfficeStatus Windows Client *only*:

- **When OfficeStatus Windows Client starts up** - This event will be triggered whenever OfficeStatus Windows Client starts up.
- **When OfficeStatus Windows Client shuts down** - Triggered anytime OfficeStatus Windows Client shuts down. Note that this includes Windows operating system shutdown as well as workstation log-off.
- **When user locks workstation** - Triggered when a user explicitly locks their workstation.
- **When user unlocks workstation** - Triggered when a user explicitly unlocks their workstation.
- **User idle time trigger** - This event will be triggered when user keyboard and mouse input is not

detected for some period of time (expressed in minutes).

- **When user is idle** - Occurs when user becomes idle after some period of time, as defined by the idle time trigger above.
- **When user is no longer idle** - Triggered when a user returns from an idle state. Note that this event will not be triggered unless the user's current status is the result of an idle event having occurred previously.
- **When user screensaver turns on** - Triggered when the Windows screen saver is activated (if one is enabled).
- **When user screensaver turns off** - Triggered when the Windows screen saver is de-activated (again, if one is enabled).

These status events are specific to the OfficeStatus web interface:

- **When user logs into web interface** - Allows user to automatically change their status upon logging into the OfficeStatus web interface.
- **When user logs out of web interface** - As above, only applies when user logs out. Note that user must explicitly log out (via one of the log out navigation elements) in order to trigger this event.

And these are *shared* by the OfficeStatus web interface and Windows Client:

- **Status events should clear status comments** - Determines whether or not your current status comments (if any exist) are cleared when a status event is triggered. This setting is shared with OfficeStatus Windows Client.
- **Status events should clear due back data** - Determines whether or not your current status "due back" data (if any exist) are cleared when a status event is triggered. This setting is shared with OfficeStatus Windows Client.
- **Status events should NOT clear status comments or due back data before user is due back** - When enabled (set to True), status events will check to see if your current status has a "due back" date/time associated with it. If so, status comments and "due back" data will not be cleared before you're due back. This setting is shared with OfficeStatus Windows Client.

Notifications

OfficeStatus notification settings apply *only* to OfficeStatus Windows Client, and include:

- **Upon status change of watched user** - Can show popup alert in user's tray notification area, play a sound on user's workstation, or both.
- **When user has new unread notes** - Can show popup alert in user's tray notification area, play a sound on user's workstation, or both.
- **Keep popup alerts on screen for** - Specifies the number of seconds alerts are kept on screen.

Spell Checking

Spell checking settings apply *only* to OfficeStatus Windows Client, and include:

- **Check spelling while user types** - Applies to the Note composition window only. Highlights potentially misspelled words with a red underlying as user types them.
- **Ignore capitalized words** - Ignores any word that appears in all upper case.
- **Ignore mixed case words** - Ignores any word that contains mixed case (e.g. both upper and lower case letters).
- **Ignore words containing digits** - Ignores any word that contains a numerical digit.
- **Check hyphenated words** - Optionally spell checks words containing hyphens (e.g. "spell-check").
- **Include user dictionary in suggestions** - Queries the user dictionary during spell check operations.

- **Suggest split words** - Suggests split words where appropriate.

Advanced

Advanced settings generally apply to the more obscure internal functions of a client interface, and include:

- **Refresh user status grid every** - Specifies the number of seconds between automatic refreshes of the User Status Board (web interface) or main window status grid (Windows Client)
- **Refresh unread notes list every** - Controls how often the unread note panel within OfficeStatus Windows Client is automatically updated. Does not apply to OfficeStatus web interface.
- **Refresh semi-static data cache** - Determines how often OfficeStatus Windows Client will refresh internal data that changes infrequently (such as department listings, custom status definitions, etc.). Does not apply to OfficeStatus web interface.
- **Refresh user home page every** - Determine how often (in seconds) a user's home page within the OfficeStatus web interface is automatically refreshed. Does not apply to OfficeStatus Windows Client.

User Overrides

The user overrides tab shows any client settings currently in effect for a specific user, overriding established default client settings.

If no override exists for a specific user / setting combination, the client setting default value will be used.

If a client setting has its "Allow user override" switch cleared (disabled), users will be unable to change such settings within their client user interface.

User overrides can be removed by clicking the check box adjacent to the settings of interest and clicking the Delete Checked Items button. This effectively causes the affected user client settings to revert to their default values when the user next logs in.

Important: Changes made through the administrative Client Settings page will not impact currently logged in users. Users must log out and back in again to be affected.

8.2 Active Directory User Import

OfficeStatus has the ability to import users from an existing Windows Active Directory store. To begin the process, navigate to *Tools >> AD User Import*.

Active Directory Access

The first step in the AD user import process is to provide OfficeStatus with directory access information. The following information is requested:

- **Specify AD server** - when checked, the specified Active Directory server will be queried (otherwise localhost will be assumed).
- **Specify username and password** - when checked, the system will authenticate against the Active Directory server with the specified username and password. When unchecked, the OfficeStatus user account (creating during server setup) will be used. Specifying a username and password is recommended.
- **Filter out common built-in accounts** - causes the system to ignore any AD account that doesn't have a user principal name (which applies to most built-in accounts).

Once these details are provided, click the List Users button to proceed.

User Import Selection

Assuming OfficeStatus successfully authenticates to your Active Directory server, a list of users will now be displayed.

Check the box to the right of the users you wish to import into OfficeStatus. Note that this box will be checked by default for each user unless the associated AD account is disabled.

Below the AD user listing, you will find a range of user import options. These options will be applied to each AD account that is imported into OfficeStatus. The first option allows you to create the import accounts within OfficeStatus in a disabled state.

Next, you must choose an OfficeStatus account password assignment method. This is necessary because Windows will not release user account passwords to OfficeStatus during the Active Directory interrogation process. The following password allocation schemes are available:

- **Automatically generate random passwords** - generates random passwords between 6 and 9 characters in length.
- **Set account passwords equal to account names** - passwords will equal the OfficeStatus user name.
- **Set every password equal to XXXX** - every OfficeStatus account creating during AD import will be assigned the specified password.
- **Don't require password matches** - any password entered by the user (including a blank one) will be accepted during client authentication.

Click the Import Selected Users button to begin the import process.

Active Directory Import Results

Finally, a listing of AD import results will be displayed on-screen. This grid contains the following information:

- The OfficeStatus account username
- A flag indicating whether or not the account was imported into OfficeStatus
- An error message, populated if the import fails or was skipped
- The password for the new OfficeStatus account

If you elected to have OfficeStatus generate random user passwords during import, now would be a good time to print them out or otherwise store them.

Click the Export Results to Excel to generate an .xls file that can be used to review this information at a later date. The resulting file should be compatible with most modern version of Microsoft Excel.

It also **recommended that you print the import results** for safe measure.

8.3 System Alert Viewer

OfficeStatus system alerts are generated as a means of notifying the system administrator of the occurrence of certain system-level events.

Examples of events that will generate system alerts include:

- Failure to deliver an outbound email message (see Email integration information)
- The occurrence of unexpected internal errors within the OfficeStatus Maintenance Service
- The detection of new, available software updates (through the Check for Updates facility)

You can manage the behavior and reporting of alerts via the Alert Config screen.

8.4 Note Broadcast

The Note Broadcast feature of the OfficeStatus web-based administrative interface allows administrators to transmit a note to multiple end users at once.

To use this capability, navigate to *Tools >> Note Broadcast* and use the Membership section of the screen to define which OfficeStatus users should receive the broadcast note.

Next, provide a subject and message body for the broadcast note, then click the Send Note button. OfficeStatus Windows Client users will receive the note in the normal manner (e.g. just as they would receive one from another co-worker).

Note: The default (but customizable) behavior of OfficeStatus Windows Client is to pop up a notification window when new, unread notes are available. Such notifications, when enabled, appear just above the Windows tray notification area on the end user's desktop.

8.5 Send Product Feedback

This screen allows OfficeStatus system administrators to send feedback directly to the developers of the system (Key Metric Software).

In order for this feature to be enabled, OfficeStatus email integration must be properly configured.

Note that absolutely no private information is sent to Key Metric Software during this process. Only the information you see on-screen is transmitted (via email).

8.6 Product Licensing

Upon purchasing an OfficeStatus license, you will be issued a permanent, non-expiring license key.

OfficeStatus is licensed on a per-user basis, and license keys enable a specific number of users to be active within the system at any given time. Inactive (disabled) users do *not* consume any portion of your user license count.

In order to use an OfficeStatus license key, you must install it. Navigate to *Administration >> Tools >> Product Licensing* to manage your licenses within the system. The resulting page will show a listing of your current licenses, separated into two tabs:

Active Installed Licenses

The installed licenses tab shows the licenses that are active for the current OfficeStatus product installation. If a license key does not appear here, it is not currently in effect.

You can, if you wish, purchase multiple OfficeStatus license keys of various user sizes and combine them to support a specific overall user count.

Trial licenses are those having an expiration date associated with them. OfficeStatus installs with a default 30-day trial license. Licenses that you purchase for OfficeStatus *never* expire.

Previous Version Licenses

This tab shows any licenses found within the system that are *not* currently active because they're for a previous version of OfficeStatus. Only licenses for the current major version of OfficeStatus can be in active service.

This tab is shown for information purposes *only* - licenses for product versions previous to the version currently installed *cannot be activated*. You may, however, require access to this information if you decide to upgrade.

Install New License

To install a new OfficeStatus License, insert the license key into the appropriate field and click the Install License button. The license will be accepted if:

- It is for the same major version of OfficeStatus you currently have installed
- It has not already been used
- If you do not already have a trial license key installed
- If the license key is genuine

When Licenses Expire

If you have no valid trial or permanent licenses installed, you are effectively running an expired OfficeStatus product installation. Such installations will have the following limitations:

- Only users that are members of the SystemAdmin role will be allowed to log in.
- No access to client (user) level functions will be allowed.
- Installed instances of OfficeStatus Windows Client will not be permitted to connect to the system.

9 Help

The following Help features are available:

- Admin Guide
- Registration
- About

9.1 Admin Guide

Opens this administrative guide help file.

9.2 About OfficeStatus

The About screen shows a variety of information relating to your OfficeStatus system installation, including the following page sections:

Version Information

Provides version information for the web-based components of your OfficeStatus Server installation. This section also provides a hyperlink that allows you to view the release notes for the currently installed version.

Check for Newer Version

Click the provided hyperlink to determine whether a newer version of OfficeStatus Server is available for download.

Note that this version check is specific to the OfficeStatus Server components, and does not determine the availability of newer OfficeStatus Windows Client versions.

9.3 Release Notes

Release notes provide a detailed historical listing of OfficeStatus product updates.