OfficeStatus Web User Guide

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1 Introduction

1.1 Introducing OfficeStatus

Welcome to OfficeStatus - The Professional Grade In/Out Board Software Solution

OfficeStatus is a software product that allows members of your organization to communicate their status and availability to other users, regardless of geographic distribution. Doing so provides a wide variety of benefits, including:

- Improves receptionist efficiency in distributing inbound phone calls
- Reduces wasted time spent trying to track down co-workers
- Eliminates the need for stick notes and "while you were away" messages
- Puts co-worker contact information at your fingertips
- Improves office communications, even across multiple locations
- And much more

The OfficeStatus Web interface provides a rich, powerful user interface that is accessible from nearly any web browser (including mobile devices).

You can also learn more about OfficeStatus on the web at http://www.officestatus.com.

1.2 About Key Metric Software

OfficeStatus software is developed, produced, and distributed by Key Metric Software, a privately held software vendor located in beautiful Traverse City, Michigan.

If you'd like to learn more about us and/or review our complete line of product offerings, please visit us on the web at http://www.keymetricsoft.com.

2 Getting Started

2.1 Signing In

In order to communicate your status and availability to other staff members within your organization, OfficeStatus must first know who you are.

When first accessing the OfficeStatus web interface, you will encounter the sign-in page. Enter the username and password provided to you by your system administrator into the corresponding fields on the screen. Click the Remember Password checkbox if you want the OfficeStatus web interface to remember your password next time you visit it. Click the Sign In button to proceed.

If you don't know your OfficeStatus username, click the Select hyperlink button next to the Username input field to display a listing of all active OfficeStatus users. You can then select your username from the list (unless this feature has been disabled by your OfficeStatus system administrator).

2.2 Navigation

After logging in to the OfficeStatus web interface, you will be taken to your OfficeStatus User Home Page (which is further described in this help topic).

You'll also find several key information and navigation areas that are common to all the pages within the OfficeStatus web interface. These areas include:

Page Header

At the top of each page appears the OfficeStatus logo, along with the following:

- Company name - Your company name will appear here (if specified by an OfficeStatus system administrator).
- Your name - Your full name, as associated with your OfficeStatus user account.
- Your status - Your current status within the system, which you click at any time to change.
- Mobile link - A link to the mobile web interface.
- Public View link - A link to the public read-only view (if enabled by an OfficeStatus system administrator).
- Sign out link - A link which, when clicked, will immediately sign you out of the system.

Main Navigation Menu

The primary navigation menu for the OfficeStatus web interface appears just below the page header. It provides access to all the features and functions of the web interface which are currently available to you.

The navigation menu is separated into the following areas:

- **Home**
  - My Home Page - Your OfficeStatus "dashboard" (the first page you see after signing in).
  - Sign Out - Immediately signs you out of OfficeStatus.
- **Status**
  - Status Board - A highly interactive listing of users within the system, along with their status and contact information, and much more.
  - My Status - Select this menu option to review and change your current status.
  - My Status Watches - Allows you to manage your status watches, which are a simple means of monitoring the status of other users.
  - My Status Schedule - Provides the ability to review and manage any status changes that are scheduled to occur at a future date and time.
- **Company**
  - My Contact Info - Allows you to review and change your phone and address records, departmental membership, work schedule, image, and more.
  - Organizational Tree - Shows the overall structure of your organizational unit.
- **Messages**
  - My Messages - Provides access to your OfficeStatus messages.
  - Compose - Immediately begins composing a new OfficeStatus message.
- **Preferences**
  - My Preferences - Allows you to mange your OfficeStatus user account preferences and settings.

- **Reports**
  - Employees
  - Departments
  - Locations
  - User Time Card
  - User Status History
  - User Status Schedule
  - Status Summary
- **Administration**
  - This menu area appears only for OfficeStatus system administrators, and provides access to system configuration and maintenance features. Features specific to system administration are described in the OfficeStatus Web Admin Guide.
- **Help**
  - User Guide (the guide you're currently reading)
  - OfficeStatus on the Web - A link to the OfficeStatus product website.

Sessions & Session Timeouts

Finally, please note that when you sign into the OfficeStatus web interface, you're establishing a *session* with the system. This session effectively represents the system's awareness of your current identity.

It's possible that your current OfficeStatus web interface will expire (or otherwise become invalid), requiring you to sign into the system again. Most often, a session will expire due to an extended period of inactivity within the web interface. But sessions can also expire due to environmental changes enacted by OfficeStatus system administrators.

3 Home

3.1 My Home Page

The OfficeStatus web interface User Home Page functions as an informational dashboard for users of the system. It contains a number of information panels that provide summary information on the system and the status of your user account within it.

Information Panels

- **My Current Status** - A quick overview of your current status. This panel also shows when you're due back (if applicable), along with any comments that may be associated with your current status.
- **My Contact Information** - A brief summary of your key contact information, including name, job title, departmental membership, location, email address, and phone number(s). Your current user account image is also shown here, if one is assigned.
- **Status Types by Department** - A visual representation of user status types by department, shown as a (relatively proportioned) stacked bar graph. Note that all statuses within OfficeStatus have one of the three *base status types* - "in", "out", or "unavailable".
- **Unread Messages** - This panel provides a summary listing of any unread messages that have been sent to you.
- **Status Watches** - Provides a listing of any users for whom you have a Status Watch established.

- **Company Announcements** - Shows any currently active company announcements.
- **Administrative Alerts** - This panel will be visible *only* to OfficeStatus system administrators. It contains summary information about the status of the system, and any alerts that may require review. This topic is further explored in the OfficeStatus Web Admin Guide.

Automatic Updating

The individual panels of the OfficeStatus web interface home page will update themselves periodically, without the need for manual intervention. Near the bottom of the page, you'll find a date / time stamp indicating when the most recent update occurred. You can also click the adjacent Refresh link to force an immediate update.

3.2 Sign Out

Using this menu option will immediately sign out the current logged-in user.

4 Status

4.1 Status Board

The OfficeStatus User Status Board is a highly interactive listing of staff members within your organization, along with their associated status and contact information.

Toolbar Functions

The User Status Board toolbar provides a range of functions related to the current user status listing. These functions include:

- **Refresh** - Causes the user status listing to update itself immediately.
- **Location filter** - Use the location drop-down box to filter the current user status listing by user location.
- **Department filter** - Filters the user status listing by departmental membership.
- **Status filter** - Filters the user status listing by user status.
- **Export** - Allows you to export the contents of the user status listing to various file formats. The export function takes into account any filters you may currently have applied.
- **User filter fields** - There are also several fields that allow you to filter the user status listing by user attributes such as name, primary phone extension, job title, or status comments. See usage example below in the section entitled "Finding Users".
- **Apply / clear filter** - There are two separate buttons that can be used to apply filter field values to the user status listing, or clear it entirely.

User Status Listing

For each user account defined within OfficeStatus, the user status listing shows their summary contact information (such as name, primary phone number, job title, etc.) as well as their status. If the user status listing is fairly lengthy (e.g. there are more than 15 users in the listing), it will be broken into multiple pages for easier display within your web browser window. In such cases, you can use the numeric page indicators near the bottom of the listing to switch between pages.

In addition to the filtering capabilities exposed through the toolbar (see above), the user status listing can also be sorted to better help you organization the information it presents. To sort the user status listing, click the textual portion of any column header. The first click will cause the listing to sort by that field in ascending order. If you click the same column header a second time, the sort order will change to descending; a third click will clear the sorting altogether.

To the right of each user listed, a small plus symbol appears. Click this symbol to expand the view of the associated user to show additional contact details. Click it again to collapse the contact info summary.

The Status field of each user listing is also interactive - clicking it will cause the user's Status Change window to appear. Whether or not you can change the status of another user depends largely upon your security role membership, which is managed by an OfficeStatus administrator. For example, members of the Receptionist security role are able to change the status of any user through this listing.

In the far right column of the user status listing is a collection of graphical action buttons. These allow you to take a specific action related to the associated user, including:

- Sending the user a note
- Watching the status of the user
- Viewing / editing the user's contact information (based upon your security level)
- Viewing / editing the user's status schedule (also based upon your security access)

You may find that some of the action buttons are disabled (e.g. grayed out an unable to be clicked). When this occurs, it's an indication that your current security role membership does not permit you access to these functions for that specific user. Please see an OfficeStatus system administrator within your organization for details.

Finding Users

If you need to quickly locate the status of a specific person, you can use the filter fields that are part of the user status grid toolbar.

Each of these fields operates in a case-insensitive manner (e.g. capitalization is ignored during filter comparison) and supports partial matching.

For example, to find a specific user by name you might enter "Carol" into the *Name* filter field and then click the adjacent User Search toolbar button to apply the filter. As a result, the user status grid listing will only contain users with "Carol" in their name.

To stop filtering the user status grid listing, click the Clear Filter toolbar icon.

Automatic Page Updates

The user status listing will update itself periodically, without the need for manual intervention. Near the bottom of the page, you'll find a date / time stamp indicating when the most recent update occurred. You can also click the adjacent Refresh link to force an immediate update.

4.2 My Status

The User Status Change window allows OfficeStatus users to update their status within the system. It also allows users to schedule status changes to occur at a later date and time.

You can access the User Status Change window in a number of different ways:

- Click your current status indicator in the Quick Function area that appears on all OfficeStatus web interface pages
- Select Status | My Status from the main navigation menu
- Click on the status of a user within the User Status Board

Once the User Status Change window appears, you'll find it it comprised of several distinct areas:

- A status selection list, from which you can choose your new status
- An area for configuring scheduled status changes
- An area for indicated your expected "due back" date and time
- An area for status comments
- Other various options and helper functions

Scheduled Status Changes

If you would like the status change you're defining to occur sometime in the future (rather than take effect immediately), click the Scheduled Status Change check box.

Doing so will enable a field that you can use to indicate when you'd like the status change to occur. Note that you must specify both a date and a time, so that the OfficeStatus system will know precisely when to enact the status change.

You can also hover your mouse over the adjacent Assist button to reveal a number of helpful date and time shortcuts. Selecting one of these menu options will simply fill in the scheduled status occurrence date / time field, and are presented here as a convenience.

Specifying Due Back Details

If you know when you plan on returning from your current status change (and would like to make this information available to other OfficeStatus users), click the Specify Due Back Date / Time check box.

Doing so will enable separate date and time fields which you can use to specify when you plan on returning. If you know your return date, but not the precise time, you can click the Time Unknown check box.

The Due Back area also provides a number of helpful features designed to make your interaction with the system more efficient. The first is the Assist button, which you can hover over with your mouse to reveal a number of menu options. Each of these menu options will compute a Due Back date and / or time, and enter it into the appropriate fields. For example, if you select "Next Workday (Start of Day)" from the menu, the system will automatically determine the date of your next working day, and when you start.

Important: The Assist button makes use of the information associated with your current Work Schedule (which is part of your user profile).

You'll find a series of buttons that you can use to make quick adjustments to your Due Back date and / or time. These buttons allow you to select the current date and time, or increment the currently displayed Due Back date and time by 15 minutes, 30 minutes, 1 hour, or 1 day.

Status Comments

The Status Change window also provides a field into which you can enter additional comments about your status change. For example, you may wish to indicate your availability (or perhaps lack thereof) via cell phone while you're away.

You can also make use of the Status Comments Library, which is a set of common, preset status comments such as "Out of cell phone range", etc. To use a library entry, simply select it from the drop-down box that appears above the status comments entry field. The available Status Comment Library entries can be customized by OfficeStatus system administrators.

Time Rounding

By default, whenever the system assists with the entry of a Due Back time, that time value will be rounded to the nearest 15 minute interval. You can adjust this behavior, or disable it altogether, using the "Round assisted times" controls on the screen.

4.3 My Status Watches

OfficeStatus allows you to "watch" the status of other users within the system.

How the system notifies of you a change to the status of a watched user depends upon what client interface you use. Within the OfficeStatus web-based interface, the name and current status of each watched user is shown on your Home Page. This list is then periodically updated, without the need for a manual browser refresh.

If you're running OfficeStatus Windows Client (a desktop application that can be installed separately), user status watch notifications appear as a pop-up window on your Windows desktop (just above the notification area of the Taskbar).

When configuring Status Watches through the OfficeStatus web-based interface, the screen in separated into two distinct areas.

Available Users

This section of the page shows users that you are not currently watching. The listing can be filtered by Department, or by a combination of First and Last name. The listing can also be sorted by any available field by clicking the textual portion of the associated column header (click twice to sort in descending order, and a third time to clear the sorting).

If it contains more than a handful of entries, the available user listing will be broken down into multiple pages. You can use the numeric page navigation links near the bottom of the available user listing to navigate through the pages.

To add one of the available users to your Watched Users list, click the Watch user image to the right of their name. That user will then disappear from the Available Users listing, and appear in the Watched Users listing (described below).

Watched Users

The Watched Users listing represents all the users you're actively watching for status changes.

Like the Available Users listing (described above), it will be separated into several pages as the listing grows in size.

The Watched User listing also shows which specific statuses are being watched, and this portion of any given status watch is editable. To edit which statuses are being watched, click the Edit button to the right of the status watch. Check boxes will be shown for:

- In - Notifies you whenever the watched user changes their status to "In"
- Out - Notifies you when the user's status changes to "Out"
- Unavailable - Notifies you when the user's status changes to "Unavailable"
- Ignore Idle - Prevents notifications from being sent when a user's status change is triggered by them being idle

When considering the above settings, please keep in mind that all statuses available within OfficeStatus have a base type of "In", "Out", or "Unavailable". If you elect to be notified when a user's status changes to "In", that notification will be triggered by any status with a base type of "In".

Note: Status watch configuration is primarily beneficial only to users running OfficeStatus Windows Client, where status watch notifications appear on the user's desktop.

To delete a status watch, click the Delete button to the right of the listing you wish to remove. That user will then re-appear in the Available Users listing.

4.4 My Status Schedule

OfficeStatus allows users to schedule their status changes to occur in the future. Scheduled status changes are created via the User Status Change window, as described in this topic.

Scheduled Status Processing

Scheduled status changes are automatically processed by OfficeStatus on a periodic basis. This automatic processing is a function of the OfficeStatus Maintenance Service - a software module that runs in the background on the OfficeStatus Server host computer and fulfills a range of system maintenance tasks. The Status Schedule listing shows whether or not any given entry has been processed.

The Scheduled Status Listing

By default, the Status Schedule listing shows status changes scheduled for the current date and beyond (those with a starting date greater than or equal to the current date). You can change this date filtering via the Start Date field in the toolbar, either by entering date directly (most common date input formats are accepted) or by clicking the small calendar icon and selecting a date from the resulting pop-up calendar.

You can also refresh the scheduled status listing by clicking the Refresh toolbar button.

Editing, Deleting & Creating Scheduled Statuses

The Status Schedule page allows you to review, edit, or delete existing scheduled status changes. Scheduled status changes can be edited as long as they haven't yet been processed (see above).

Individual scheduled statuses can be deleted by clicking the delete button to the right of the entry. You can also use the Delete button in the toolbar to delete multiple entries at once - either all entries within the current view, or just those that have already been processed.

Note that deleted scheduled statues will no longer appear in the User Status Schedule Report. However, they will appear in the Status History Report for the associated user and will show "[OfficeStatus Maintenance Service]" in the Changed By field.

Finally, you can create new scheduled status changes via the New toolbar button. Clicking it will cause the User Status Change window to appear, with the Schedule Status Change check box engaged by default.

5 Company

5.1 My Contact Info

The OfficeStatus web interface allows users to edit their own contact information, including location and departmental membership, work schedule, user image, and more.

The contact information editing screen is organized into **multiple tabs**:

- **General Tab** - Provides access to fundamental user account attributes such as name, job title, location, work schedule, etc. This information is updated when you click the Save Changes button near the bottom fo the screen.
- **Phone Tab** - Allows users to add, edit, and delete their own phone number entries. Phone number entries are categorized by type (e.g. office, home, fax, etc.). The phone number types available for selection are managed by OfficeStatus system administrators. Phone number entries flagged as being "Primary" will show up in the user status listing.
- **Address Tab** - Conceptually identical to the phone number entries described above, users can have multiple address records (of various types) associated with their user account.
- **Departments Tab** - Allows users to manage their departmental membership. To join one or more departments, click the Join link to the right of the correlative entry in the Available Departments listing. To leave a department of which you're currently a member, click the Leave link to the right of that entry in the Member Of Depts listing. Only OfficeStatus system administrators can create new departments, or edit / delete existing ones.
- **Company Tab** - Read-only informational tab which presents your company's name, contact, and policy information. This information can only be changed by an OfficeStatus system administrator.
- **Location Tab** - Read-only description and contact information associated with your current location (if one is assigned). This information can only be changed by an OfficeStatus system administrator.

Tip: The "Reports To" field on the General tab is used in creation of your company's Organizational Tree.

Work Schedule

OfficeStatus uses its knowledge of each user's work schedule to provide assistance during certain operations (for example, the Assist button available during User Status Changes).

The contact information screen allows you to modify your work schedule, specifying which days of the week you work, your daily schedule (work day start and end times), and the start time and duration of your lunch hour.

Your work schedule default values come from the OfficeStatus site-wide schedule, which is managed by your OfficeStatus system administrator.

Managing Your User Image

To change the image currently associated with your OfficeStatus user account, click the Change Image link on the General tab of the contact information screen. Doing so will cause the User Image Manager window to appear. This window shows your current user image, if any, and allows you to upload a new image or change the description of the current one.

To upload a new user image, click the Browse button and locate the desired image on your computer. Give the image a description, if you wish, and then click the Save / Upload button. Your existing user image (if one exists) will be replaced by the new one.

Important: In order to upload a user image, it must have a file type extension of .gif, .jpg, or .png. Other file formats will not be accepted for upload.

You can also use the Delete Image button to remove your current user image entirely. When no image exists for your user account, a default "No Image Available" drawing will be shown in its place.

5.2 Organizational Tree

The Organizational Tree is designed to show relationships between OfficeStatus users.

OfficeStatus uses the "Reports To" field associated with each user's contact information to generate the organizational tree.

You can affect your position in the organizational tree by changing the "Reports To" field in your contact information.

Use the toolbar provided to filter the organizational tree by location, department, etc.

6 Messages

6.1 My Messages

OfficeStatus offers a simple internal messaging system that is similar to email, but limited to being sent and received by OfficeStatus users.

The My Messages page of the OfficeStatus web interface resembles that of popular email clients such as Microsoft Outlook. Notes are separated into several views:

- **Inbox** - Shows messages that have been sent to you.
- **Drafts** - Shows messages that you have composed, but have not yet sent.
- **Deleted** - Shows messages you have recently deleted.
- **Sent** - Shows messages that you have sent to other users.

Tip: To change the current view, use the drop-down box (labeled "Viewing") in the message toolbar.

To the right of the page you'll find a listing of notes, as well as a note reading pane just below that. A toolbar sits above all of these areas, providing quick access to various note-related functions.

Message List

The message listing will change according to which view (described above) is currently selected.

When a message is selected, its contents will appear in the reading pane. You can also double-click a message in the listing, which will cause it to open in a re-sizable pop-up window.

You can also take a specific action (e.g. reply, forward, delete, etc.) for the selected message using the toolbar.

Tip: If you don't see all the messages you expect in this listing, it may be that the view is being filtered by sent date. See the Sent Date Filtering page section below for more information.

Toolbar Functions

The Note toolbar provides access to the following functions:

- **Refresh** - Refreshes the current message listing.
- **New** - Navigates to the message composition page.
- **Reply** - Navigates to the message composition page, which will be configured to reply to the selected message's sender.
- **Forward** - Navigates to the message composition page, which will be configured to forward the currently selected message.
- **Restore** - Enabled only when viewing deleted messages. Restores a deleted message, returning it to either the Inbox or Drafts view (based upon where it resided prior to deletion).
- **Edit** - Enabled only when viewing draft messages. Allows you to resume composition of a previously saved (but as of yet unsent) message.
- **Delete** - Deletes the currently selected message. Not available when viewing deleted or sent messages.
- **Show Messages Sent** - Allows you to filter the current message listing by the date the messages were sent.

Sent Date Filtering

By default, the message listing will show all available messages. You can filter this list by using the Show Notes Sent toolbar drop-down box.

Deleting Messages

As a general practice, you should consider deleting OfficeStatus messages as soon as they're no longer useful. Use of OfficeStatus notes to permanently store valuable electronic information is not recommended.

Deleted messages can be restored (either to the Inbox or Drafts view, depending upon where they resided prior to deletion) via the Restore toolbar button.

After some period of time (as determined by your OfficeStatus system administrator), deleted messages will be permanently purged from the OfficeStatus data store, and can no longer be restored.

6.2 Composing Messages

OfficeStatus Messages can be composed and then transmitted to other OfficeStatus Users, or saved for sending at a later date.

For a high-level overview of OfficeStatus messaging, please review the help chapter entitled My Messages.

Managing Message Recipients

A key aspect of message composition is designating the message's recipients. To do this, click the "To" hyperlink - this will cause a user selection area to appear.

To add OfficeStatus users to your list of message recipients, select them from the Available Users listing and click the Add button.

Removing message recipients is done in a similar fashion - select the users you want to remove in the Recipients list, and then click the Remove button.

Tip: You can select multiple users in either list by either holding down the Ctrl key while selecting users (to select multiple individual users), or by holding down the Shift key (to select a range of users) and clicking the first and last users in succession.

Once your message recipients have been designated, you can collapse the user selection area of the screen by click the "To" hyperlink again. The recipients of your message will continue to be shown in the adjacent field.

Composing Your Message

Enter a subject and body for your message into the respective fields.

Although the subject of your message can be left blank, doing so is not generally recommended. A brief but descriptive subject line will help the recipients of your message to locate it more quickly and make better-informed decisions when interacting with it.

The body of a message cannot be left blank.

Sending and Saving

Click the Send Now toolbar button to transmit your message to the designated recipients immediately. Or, click the Send Later button to save a draft copy which can be further edited (and optionally sent) at a later date.

Messages which are "Sent Later" become visible in the Drafts view of the My Messages page.

To cancel the composition of a message without sending it, click the Cancel toolbar button.

7 Preferences

7.1 My Preferences

OfficeStatus allow you to customize the behavior of the client user interfaces to suit the way you work.

Within OfficeStatus, user level preferences can be broken down into three categories:

- Those specific to the web client interface

- Those specific to OfficeStatus Windows Client interface
- Those shared between the two client interfaces

When managing preferences from within the OfficeStatus web interface, only settings that are specific to the web interface or shared between the web and Windows Client interfaces are shown. To customize the way OfficeStatus Windows Client works, you can do so from within the Windows Client itself.

Preferences available within the web interface are separated into three tabs - General, Status Events, and Advanced. Each of these areas are described below.

General

The General preferences tab exposes core settings within the system, many of which are shared between the web and Windows client interfaces. General preferences include:

- **Password change** - Click the Change Password Now button to reset your user account password.
- **Initial department selection** - Allows you to set which department is selected by default when viewing the Status Board within the web client interface (also affects the main screen of Windows Client).
- **Initial location selection** - Allows you to set which location is selected by default when viewing the Status Board (also affects the main screen of Windows Client).
- **Highlight me in the user status grid** - When set to true, your user account will be highlighted within the Status Board of the web interface (or the main status listing of the Windows Client).

Status Events

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

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

Status Changes

Determines how specific types of status changes affect existing status data.

IMPORTANT: These settings apply *only* to status changes for which comments and due back data *cannot* be specified (such as quick status changes and status changes triggered by status events).

- **Clear existing status comments** - Determines whether or not your current status comments (if any) are cleared. This setting is shared with OfficeStatus Windows Client.
- **Clear existing due back data** - Determines whether or not your current status "due back" data (if any) are cleared. This setting is shared with OfficeStatus Windows Client.
- **Do not clear status comments or due back data before I'm due back** - When enabled (set to True), 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.

Advanced

The following advanced options are available:

- **Refresh user status grid every** - Controls the frequency (expressed in seconds) at which the User Status Board listing (grid) is automatically refreshed. This setting is shared with OfficeStatus Windows Client, where it applies to the main window user status grid.
- **Refresh web client dashboard every** - Controls the frequency (expressed in seconds) at which the User Home Page panels are automatically updated.

7.2 Disabled Options

You may find that your ability to change some client preferences is limited by the user interface (for example, a button or selection mechanism is grayed out and unable to be changed).

This behavior can occur if an OfficeStatus system administrator has elected to "lock down" one or more client settings, preventing them from being changed through the client interfaces.

OfficeStatus system administrators can also manage the default values for these settings.

8 Reports

8.1 About Reports

8.1.1 Shared Report Features

There are a number of common features shared among all OfficeStatus Reports.

Report Parameters

A number of OfficeStatus Reports allow you to adjust their parameters in order to customize the data they show. When a report supports such parameters, the associated input controls will be shown at the top of the report, along with a Preview button that you can use to execute the report after changing the parameter values.

Report Toolbar

Each OfficeStatus Report has a toolbar that exposes a number of important functions:

- **Paging** - Use the arrows to navigate between pages of the report. The far right and left arrows allow you to navigate to the first and last report pages, respectively.
- **Exporting** - To export the contents of a report, select the desired export format from the drop-down box in the toolbar and click the adjacent Export button.
- **Refresh** - Refreshes the contents of the currently displayed report.
- **Print** - Allows the contents of the report to be printed.
- **Show / Hide Parameters** - If the current report supports parameters (explained above), you can toggle visibility of the parameter input area with this button.

Important: To enable support for printing reports from within the Google Chrome web browser, please navigate to ***chrome://plugins/*** (you can type "chrome://plugins/" directly into the address bar) and ensure that the Adobe Acrobat plug-in is enabled.

8.1.2 Report Security

OfficeStatus Reports are accessible to all OfficeStatus users. However, the data available will be dictated by the security role of the currently logged in user.

Employee, Departmental, and Location Reports

All data provided within the employee, departmental, and location reports is available to all OfficeStatus users.

User Status History and User Status Schedule Reports

When running the User Status History or User Status Schedule reports, the list of available users (against which you can report) is controlled by your OfficeStatus security role, as follows:

- Normal users can report only against themselves.
- Members of the System Administrator role can report against any user.
- Members of the Receptionist role can report against any user.
- Members of the Department Manager role can report against themselves and any other user within the same department.
- Members of the Report Viewer role can report against any user.

The assignment of security roles to OfficeStatus users is managed by your OfficeStatus system administrator.

8.2 Report Types

8.2.1 Employees

The Employees report provides a listing of employees (users) within the system. It shares a set of common features with all OfficeStatus reports.

For each user that appears within this report, their first and last name, job title, email address, and location is shown. A phone number listing is also shown below each user entry within the report. The display of phone number entries can be disabled by setting the "Show phone numbers" report parameter to False.

You can filter the Employee Report listing by location using the corresponding drop-down box.

8.2.2 Departments

The Departments report provides a break-down of users contained within each OfficeStatus department. It shares a set of common features with all OfficeStatus reports.

For each user within a department, this report displays their first and last name, job title, location, and to whom they report (if applicable).

Please note that an OfficeStatus user may be a member of multiple departments.

8.2.3 Locations

The Location report provides a listing of users contained within each OfficeStatus location. It shares a set of common features with all OfficeStatus reports.

For each user within a location, this report displays their name and job title. The display of users can also be toggled off, leaving you with only the department names and their descriptions.

8.2.4 User Time Card

The User Time Card report shows a daily breakdown of the number of hours an employee was assigned a status of type "In".

Note: Any custom statuses in use within you organization with a status type of "in" will be included in this report.

8.2.5 User Status History

The User Status History report provides a history of status changes for a given OfficeStatus user, along with a summary of hours spent in each of the three status types - "In", "Out", and "Unavailable". It shares a set of common features with all OfficeStatus reports.

The report time frame can be controlled through the use of the Start and End date fields available in the parameter input area. Reporting output can be further filtering via use of the the Status Type and User(s) parameter input fields.

The availability of OfficeStatus users available for reporting is dictated by reporting security rules.

8.2.6 User Status Schedule

The User Status Schedule report provides a means of reviewing status schedules for one or more users.

Each scheduled status listed within the report shows the full name of the user for whom the status change is scheduled, as well as the target status, starting date, due back information (if applicable), creation date and time, status comments, and whether or not the system has yet processed the event.

The report can be filtered by starting date (which defaults to the current date) as well as user(s).

The availability of OfficeStatus users available for reporting is dictated by reporting security rules.

8.2.7 Status Summary

The Status Summary report shows the number of OfficeStatus users in each status at the time the report is generated.

This report includes a bar graph that shows the top 10 statuses (by user count). This graph will not include any statuses that currently have no users assigned to them.

9 Mobile Interface

9.1 Introducing Mobile Device Support

The OfficeStatus mobile web interface provides a means for OfficeStatus users to access the system through the web browser included with their mobile device. It contains a subset of the functionality included in the normal OfficeStatus web interface (which is accessible through a normal desktop web browser).

When an OfficeStatus user accesses the web interface from a web browser on a supported mobile device, they will be presented with the OfficeStatus mobile web interface. This interface is optimized for presentation on small-screen devices. Since it is a web interface, it can be accessed from anywhere that network / Internet connectivity is available.

From the mobile web interface, users will be able to:

- View and change their own status
- View the status of others by location, department, name, etc.
- Change the status of other users (given appropriate role membership)
- Send and receive OfficeStatus notes
- Add and remove status watches
- View a summary of user contact details

9.2 Supported Mobile Devices

The OfficeStatus mobile web interface was designed to function on iOS (iPhone and iPad), Android, BlackBerry, Windows Phone 7, and newer Symbian devices. Any device running the Opera Mini web browser is also supported.

The target device must be running a modern web browser with reasonable Javascript and CSS support. The minimum supported screen resolution is 240x320.

Users are automatically forwarded to the mobile web interface when attempting to access OfficeStatus from a supported mobile device.

9.3 Additional Mobile Help

You can get additional information on how to use the OfficeStatus mobile web interface by signing in through the web browser of your mobile device and selecting the Help menu option on the mobile user home page.