



OfficeStatus Server Admin Guide

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1 Introduction



Welcome to OfficeStatus

OfficeStatus provides a robust web interface which system administrators can use to manage and configure the system.

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) sections of the interface, please refer to the *OfficeStatus Web User 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 capabilities that are extremely robust, reliable, and accessible.

- **Robustness** - OfficeStatus is secure, scalable, and well tested.
- **Reliability** - OfficeStatus was designed and engineered with crash resistance and service availability as first-class goals.
- **Accessibility** - OfficeStatus leverages the power of the web 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 rooted in a service-based 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 users elect to use.

2.2 Components

OfficeStatus is comprised of the following main components:

- **OfficeStatus Windows Client** - 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).
- **Mobile Interface** - The web interface mentioned above seamlessly provides access to OfficeStatus from a broad range of mobile devices.
- **Web Service Layer** - Provides system connectivity to OfficeStatus Windows Client and a 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.
- **SQL Server Database** - OfficeStatus uses Microsoft SQL Server database technology for relational data storage.

All of these components cooperate to provide a seamless experience to OfficeStatus end users and system administrators alike, from anywhere in the world.

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.
2. **OfficeStatus Windows Client** - End users can install and use the OfficeStatus Windows Client on their computer for an even richer experience.
3. **OfficeStatus Mobile Interface** - Accessing the OfficeStatus Web Interface from a mobile device automatically renders a mobile-friendly interface.

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). The web interface is also accessible to mobile device web browsers.

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:

- Offers smart "auto-sensing" technology that can detect an end user's status based upon activity or environmental events.
- 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).
- Provides compact "mini view" mode.
- Can be run in "full-screen" mode.

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.
- Needn't be upgraded separately when new versions of OfficeStatus are released.
- Supports mobile devices (see below).

OfficeStatus Mobile Interface:

- Provides a useful subset of functionality from nearly any modern mobile device.
- Otherwise, provides similar advantages to the normal OfficeStatus Web Interface (see above).

2.3.1 Web Interface

OfficeStatus provides an advanced web-based interface interface that encapsulates both end user (client) *and* administrative functions. It is one of the three 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 administrative functions not available to normal (non-admin) users. Details about these administrative functions can be found in the remainder of this guide.

Normal (non-admin) end users can also log into the OfficeStatus web interface, but they will not have access to any administrative functions. When users access the web interface from a supported mobile device, they will be presented with a separate (mobile device friendly) interface.

2.3.2 Windows Client

OfficeStatus Windows Client is a powerful, user-friendly desktop application that can be installed on the computers of one or more users. It is one of the three 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.

2.3.3 Mobile Interface

Mobile device users can access OfficeStatus via its mobile interface. It is one of the three client interfaces available to OfficeStatus users.

Using the mobile interface is easy; users just access the OfficeStatus Web Interface from any mobile device with a modern web browser.

The OfficeStatus mobile web interface was designed to support 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.

The OfficeStatus mobile web interface provides mobile end users with the ability to view and change user status, view user contact details, send/receive messages, and more.

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 **5.0.310.0**, the major version number is 5, the minor version number is 0, the revision number is 310, and the build number is 0.

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 optional, but strongly 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 Signing In

To sign into the OfficeStatus web-based administrative interface and use 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 sign 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.

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 sign 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 user icon in the header of all pages and selecting "Sign Out".

5 Administration Menu

5.1 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.

5.1.1 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.

5.1.1.1 Listing Users

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

Each row of the user listing contains summary information about an OfficeStatus user, as well as hyperlinks that can be used to edit or delete the user account.

You can also use the Filter User Account Listing control (near the top of the page) to narrow down the user list.

Batch Editing

The user listing page also offers a simple means of batch editing various user attributes.

The batch editing tool appears near the bottom of the user listing. Use it by selecting a supported user attribute and then selecting the desired value. Next, select the users you want to affect with this change by clicking the check boxes that appear to the right of their user names. Finally, click the Update Select button to update all selected users.

See also:

- Creating Users
- Editing Users
- Removing Users

5.1.1.2 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.

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.

5.1.1.3 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
- Reporting Users

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.

5.1.1.3.1 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. Required.
- **First name** - User's first name. Required.
- **Last name** - User's last name. Required.
- **Job title** - User's job title or description. Optional.
- **Email address** - Email address for the user. Optional, but recommended. Required in order to use calendar synchronization features.
- **IM address** - User's instant messaging address. Optional.

- **SMS number** - The phone number associated with the user's mobile device.
- **SMS provider** - Used to specify the email gateway that will be used when sending SMS messages.
- **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, but recommended (used in support of the Organizational Tree feature).
- **About (bio)** - Information about the user, visible to 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.

Important: *If the user is to leverage Outlook calendar synchronization, their email address must match that of their Microsoft Exchange account.*

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 Attributes

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:

- **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.
- **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 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.
- **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.
- **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.

- **Allow user to change their own department membership** - When checked, user will be able to change their own departmental membership (e.g. join and leave departments when editing their own contact information).
- **Allow user to change their own location** - When checked, user will be able to change their own location (when editing their contact information or via the user status board right-click menu).
- **User can only see depts of which they are a member** - When checked, users will only be able to see departments of which they are currently a member. All other departments (and their members) will be hidden from users with this setting engaged.
- **Allow user to log into Windows desktop interface** - When checked, user will be allowed to log into OfficeStatus via OfficeStatus Windows Client.
- **Allow user to log into web interface** - When checked, user will be allowed to log into the OfficeStatus web interface.
- **Allow user to log into mobile web interface** - When checked, user will be allowed to log into the OfficeStatus mobile web interface.

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.

5.1.1.3.2 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 a primary phone number for the associated user. Primary phone numbers are shown in user status grids and the company phone list.

IMPORTANT: *You can have one primary phone number for each phone type (e.g. one primary each for cell, fax, mobile, etc.).*

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

5.1.1.3.3 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.

This information is considered "private", and will only be visible to the owning user, admins, receptionists, and department managers.

5.1.1.3.4 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.*

5.1.1.3.5 Emergency

The Emergency tab of the User Editor screen allows you to specify emergency contact, phone, and plan information for the user being edited.

This information is considered "private", and will only be visible to the owning user, admins, receptionists, and department managers.

5.1.1.3.6 Reporting Users

The Reporting Users tab of the User Editor allows you to specify which users report to the account currently being edited.

Select the users that should report to the user being edited from the Available list, and then click Add. Reverse the process to remove reporting users.

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

5.1.1.3.7 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.

Tip: 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.

5.1.1.4 Removing Users

To permanently remove an OfficeStatus user account, first locate that user in the user list and click the Edit button. A Delete User button will appear near the bottom of the user editor screen.

A message will appear that describes the impact of user account deletion. As noted on this page, user account deletion is **permanent** (e.g. cannot be undone), as is the removal of any dependent records (e.g. user status history, etc.).

If you wish to proceed, click the Confirm User Deletion button, otherwise click Cancel to return to the user editor.

User Account Cleanup

OfficeStatus also offers the ability to permanently delete multiple user accounts at once.

To do this, navigate to *Administration | Security | User Account Cleanup*.

IMPORTANT: The User Account Cleanup tool allows system administrators to delete all OfficeStatus user accounts that are **current disabled**. Therefore, use of this tool is a two-step process:

1. Use the account manager to batch disable any user accounts you no longer need.
2. Use the User Account Cleanup tool to permanently delete all disabled user accounts.

TIP: Use the user deletion tools carefully and review all warning messages in order to avoid unintended data loss.

5.1.2 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.

5.1.3 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).

Locations can also be flagged as **private**, in which case they (and the users they contain) are hidden from non-members.

Assigning Users to Locations

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

5.1.4 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 full access to every area and feature in the system, including system maintenance functions.
- **Receptionist** - Members of this role can change the status of any user, as well as view their status history or edit their contact information.
- **DeptManager** - Members of this role can modify the status of any user in the same department(s). They can also view status history and edit contact information for users in the same department(s).
- **ReportViewer** - Members of this role can view reports without data limitations (but are otherwise normal users).
- **LocationManager** - Users of this role can manage status, contact information, and status schedule for users in same location.

Normal users (those not part of any Security Role) can modify their own status and view the status (including scheduled status) and contact information of others. They can also view reports, but will be limited to viewing data associated with their own user account (when applicable).

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 *Administration >> 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.

5.1.5 Password Policy

The OfficeStatus password policy can be used to regulate the complexity of user account passwords, thereby improving user account security.

To enable password policy features, navigate to *Administration >> Security >> Password Policy* and configure the desired options accordingly.

IMPORTANT: Changes to the password policy do not apply to existing user passwords. Rather, the policy is enforced when user passwords are created or changed.

IMPORTANT: Windows Client users must have v3.0 or later installed to enable password policy conformance checking.

5.1.6 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 sign-in.
- 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.

5.2 System

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:

- Enable or Disable Features
- General Settings
- Email Settings
- Logging Settings
- Alert Settings
- Data Retention Settings
- Exchange Sync Settings
- Phone Types
- Address Types
- SMS Providers

5.2.1 Enable or Disable Features

The following settings allow system administrators to enable or disable features on a system-wide basis:

- **Enable 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.

- **Enable Password Reset** - When enabled, users that forget their OfficeStatus user account password will be allowed to reset it by clicking a link that is emailed to them. Email integration must be properly configured for this feature to work.
- **Enable Messages** - When disabled, no user will have access to message-related features (e.g. sending and receiving, etc.). System administrators will also no longer be able to use the Message Broadcast tool.
- **Enable Public View *** - When enabled, exposes a public-facing, read-only view of user statuses through the OfficeStatus web interface. The resulting view will be accessible via `http://your-officestatus-address/public`. See the About the Public View topic for details.
- **Enable Scheduled User Status Changes** - When enabled, allows users to schedule status change to occur in the future. Note that disabling this feature will also effectively disable calendar sync features.
- **Enable Resources** - When disabled, all attempts to access resource status tracking features (by any user) will be denied.
- **Enable Status Locks by Normal Users** - When enabled, normal users will be able to apply status locks, thereby preventing changes not initiated by users. **IMPORTANT:** Admins, managers, and receptionists can always use this feature.
- **Enable Contact Info Editing by Normal Users** - When enabled, normal users will be able to edit their own user contact information. Note that this setting will not affect access rights for admin, manager, and receptionist role members.
- **Enable Resource Creation by Normal Users** - When enabled, normal users will be able to create new resources. Note that this setting will not affect access rights for admin, manager, and receptionist role members.
- **Enable Status Watch Features For** - Status watches allow users to monitor (and receive notifications for) status changes in other users. Set this to "Role Members Only" to allow only admin, manager, and receptionist role members access to status watch features.
- **Enable Text Messaging Features For** - OfficeStatus offers the ability to send text messages to users via SMS email gateways. Set this to "Role Members Only" to allow only admin, manager, and receptionist role members access to text messaging features. Email integration must be properly configured for text messaging to work.
- **Enable Quick Status Changes** - Quick Status Change functions allow users to change their status with just a couple clicks, effectively bypassing the "full" User Status Change window. Disabling this option removes Quick Status change functions from all user interfaces.

** **IMPORTANT:** When enabled, the Public View will be accessible to everyone (no authentication required) via the OfficeStatus web interface. If your OfficeStatus Server installation is accessible via the general Internet, so will be the Public View (if enabled).*

5.2.2 General Settings

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.
- **User Name Display** - Determines how user names are displayed within user status listings, reports, and other user interface areas.

- **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.

5.2.3 Email Settings

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 Port** - Specifies the port to be used for SMTP operations. The default non-secured port is 25. If using GMail, this will usually be port 587 (see GMail documentation for details).
- **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.
- **SMTP Encryption** - Check the Use SSL check box if your mail server provider requires that SMTP communications be SSL encrypted.
- **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.
- **SMS From** - Check this box to force SMS messages to use the from name and address above (rather than those of the sending user).
- **Delete Queued Outbound Emails When** - Here you can determine when outbound email messages should be deleted from the application database queue.
- **Send Test Message To** - Saves the current configuration and attempts to send a test email message to the designated email address.

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.

5.2.4 Logging Settings

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.

5.2.5 Alert Settings

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.

5.2.6 Data Retention Settings

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

Unless pruned periodically, the data created by certain OfficeStatus features (such as user status history tracking) will grow without limitation. Data Retention Settings provide a means of performing such pruning at intervals that make sense for your organization.

Data pruning strategy is particularly important if you're using MS SQL Server Express, in which case a maximum database size is enforced.

- **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.
- **Prune Resource Status History After** - Resource status history will be retained for this many days for each defined resource. Impacts the amount of information available when displaying resource status history records.

- **Prune Processed Status Schedule Records After** - Processed status schedule records will be retained for this many days. Applies to both user status and resource schedule records. Impacts the amount of data available when displaying status schedule reports..
- **Prune Deleted Messages After** - When messages are deleted by users, they aren't removed from the database immediately. This setting allows you to (permanently) prune these deleted messages to conserve database space.
- **Auto-Delete Old Messages After** - Sometimes users fail to delete messages in a timely manner, causing the database size to grow. This option automatically flags old messages 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 messages that have been read (recommended).

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

5.2.7 Exchange Sync Settings

In order to allow OfficeStatus users to leverage manual and automatic calendar synchronization features, Exchange Sync must be properly configured.

- **Enable Exchange Sync** - Global switch used to enable / disable Exchange calendar synchronization features.
- **Disable Cert Validation** - Disables SSL/TLS certificate validation when communicating with Exchange. May be required when using HTTPS with self-signed certificates.
- **Ignore Private Appointments During Auto-Sync** - Ignores private calendar appointments during auto-sync operations. Note that private appointments will still be visible (but deselected by default) during manual calendar sync operations.
- **Sync Status Comments with Appointment Subjects** - Use this setting to control when appointment subjects are carried over to user status comments during the calendar sync process.
- **Service URL** - Your Exchange Web Services (EWS) service URL, generally in the form of <https://mail.contoso.com/EWS/Exchange.asmx>.
- **Username** - The username of your Exchange administrative account. This account should have read access to everyone's calendar. Please see below for more information.
- **Password** - The password associated with your Exchange administrative account.
- **Domain** - The domain name associated with your Exchange installation (e.g. contoso.com). If you don't authenticate to a domain, leave this field blank.

Configuring Permissions within Exchange

In order for Exchange integration to work properly, the user account you specify above must be able to access calendar information for all other users.

To configure permissions for a specific Exchange user:

1. Open the **Exchange Management Console**
2. Expand the **Recipient Configuration** node in the left-hand navigation tree
3. Select **Mailbox**, resulting in a list of users appearing
4. Right click the user for whom you are granting permissions and select **Manage Full Access Permission**

When the Manage Full Access Permission window appears, click on the **Add** button. Select the user you that you specified above in the Exchange Sync username field and click **OK**.

Click the **Manage** button, and then **Finish** to complete the operation.

Bulk Method for Setting Exchange Permissions

Within the Exchange Management Shell, execute the following command:

```
get-mailbox -resultsize unlimited | add-MailboxPermission -user <AdminUsername> -AccessRights FullAccess -InheritanceType All
```

Replace the <AdminUsername> portion of the command above with the username you specified above in the Exchange Sync username field.

Note: It may take some time for changes made to replicate through Active Directory. For immediate results, either force Active Directory replication or restart the Exchange Information Store Service.

Troubleshooting

If you followed the steps above but receive the error "The specified folder could not be found in the store" when attempting to use calendar sync features, please try the following:

1. If you used the bulk method for setting Exchange permissions (as described above), try setting user mailbox permissions individually for problematic accounts (see "configuring permissions within Exchange" heading above).
2. If problems persist, reboot the Active Directory and Exchange host computers to force a full data store sync across systems.

5.2.8 Telephony Integration

OfficeStatus provides both server and client telephony integration options.

To enable server-side telephony integration, navigate to *Administration >> System >> Telephony Integration* and enable the call monitoring feature.

For additional details regarding OfficeStatus telephone integration, please see the OfficeStatus Telephony Integration Guide.

5.2.9 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.

Important: Client Settings configuration changes will not affect existing client sessions until the user's next sign-in.

To manage client settings, navigate to *Administration >> System >> Client Management >> 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:

- **Minimize Windows Client after signing in** - Determines whether or not OfficeStatus Windows Client minimizes upon start up.
- **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).
- **Minimize behavior** - Determines how Windows Client behaves when the main window is minimized.
- **Close behavior** - Determines how Windows Client behaves when the main window is closed.
- **Highlight user in user status board** - When engaged, highlights the current logged-in user within the User Status Board (web interface) or the main application window (Windows Client).
- **Enable global hotkey** - Enables or disabled use of the global hotkey in Windows Client.
- **Send users directly to status board after web login** - When enabled, send the user directly to the status board (rather than the user home page) after logging into the web interface.

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 Windows Client starts up** - This event will be triggered whenever OfficeStatus Windows Client starts up.
- **When Windows Client shuts down** - Triggered anytime 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 screen saver turns on** - Triggered when the Windows screen saver is activated (if one is enabled).
- **When user screen saver 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.

Auto Sync

These settings manage the configuration of Exchange calendar auto-sync features.

- **Enable auto sync** - Enables or disables automatic calendar sync.
- **Sync for the next** - Enter the number days for which calendar appointments will be synced.
- **Automatically sync <Calendar Status> to <OfficeStatus status>** - Each of the remaining settings allows you to map between Exchange/Outlook calendar appointment statuses (such as "Free", "Busy", etc.) and OfficeStatus statuses.

Telephony Events

These settings are specific to Windows Client, and affect telephony integration capabilities.

- **Line to monitor** - Actual line (device) selection must be made within Windows Client. Disallowing user override for this setting has the effect of disabling telephony integration for all users.
- **When an inbound call is connected** - Sets user status when inbound call is connected.
- **When an outbound call is connected** - Sets user status when outbound call is connected.
- **Return to previous status when calls are disconnected** - If the user status hasn't changed since the call was connected, will revert their status upon disconnect.
- **Modify status comments to show caller ID, when available** - Sets user status to "On phone with 555-5555" (as an example) when caller ID value is actually available.

Status Changes

These settings are all *shared* by the OfficeStatus web interface and Windows Client. They apply ONLY in scenarios where the user is unable to specify status comments and due back data (such as quick status changes, status events, etc.).

- **Clear existing status comments** - Determines whether or not user status comments (if any exist) are cleared.
- **Clear existing due back data** - Determines whether or not user status "due back" data (if any exist) is cleared.
- **Do not clear status comments or due back data before user is due back** - If a user status has a "due back" date/time associated with it that occurs in the future, status comment and "due back" data clearing will be prevented.
- **Round assisted date/time values** - Enabled or disables rounding of assisted date/time values during status change operations.
- **Round assisted times to nearest** - Specifies the number of minutes to which assisted date/time values will be rounded.

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:

- **Dictionary** - Specifies which dictionary should be used by default.
- **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.

Pushing Client Settings to Users

Admins can also push a set of client settings to one or more specific users.

Near the bottom of the Client Settings page, you can choose one or more users to receive the currently defined client settings. Clicking the Push button will then overwrite all client settings for the selected user(s) with those currently specified.

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.

5.2.10 Client Updates

The OfficeStatus **Client Updates** feature allows installed instances of OfficeStatus Windows Client to keep themselves up to date, thus minimizing ongoing administrative maintenance.

When this feature is enabled, OfficeStatus Windows Client will compare its currently installed version number against the one published by OfficeStatus Server. If the version available on the server is newer, OfficeStatus Windows Client will prompt the user (more on that in a second) and update itself accordingly. This process occurs immediately after the user signs into OfficeStatus Windows Client.

The **Client Update Mode** option allows administrators to determine how users experience these updates. If updates are optional, users will be asked whether or not they wish to upgrade now or be "reminded tomorrow". If updates are required, the user will be notified of such and will not be allowed to proceed until the update occurs.

When OfficeStatus Windows Client performs an automatic upgrade, it downloads a current setup file directly from OfficeStatus Server. If an error occurs during the download or upgrade installation process, the user will be notified and the process will be repeated the next time the user signs in. If the update process is successful, the newly updated OfficeStatus Windows Client will be re-launched automatically and the user can proceed with sign-in.

Important: Users must be running OfficeStatus Windows Client v5.0 or later in order to use this feature. Client installations older than v5.0 will not attempt to update themselves in the manner described above.

5.2.11 Client Layout

The OfficeStatus Client Layout features allow admins to control the appearance and behavior of specific client (desktop and/or web) features.

Status Board Columns

The Status Board Columns tab allows you to configure which status board columns appear within the Windows and web client interfaces by default and whether or not users can modify the default column layout.

- Allow Users to Choose Columns - When disabled, users will not be able to modify which columns appear within the user status board (desktop and web interfaces).
- Default Visible Columns - Select which status board columns should be visible by default. These column selections are applied to both web and desktop interfaces.

Important: Custom status fields have their own default visibility settings, and are therefore not listed within the Default Visible Columns selector.

Miscellaneous

- Show Windows Client Docking Panels - This setting affects the default visibility of the docking panels shown within OfficeStatus Windows Client. Affected panels include Status Watches, Unread Messages, Announcements, and Status Types by Departments. Note that users can always customize the visibility of these panels via the View menu.

Important: Client Layout configuration changes will not affect existing user sessions until the user's next sign-in.

5.2.12 Lookup Data

5.2.12.1 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.

5.2.12.2 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.

5.2.12.3 SMS Providers

When OfficeStatus sends text messages, it uses SMS email gateways to perform the message transmission. These gateways are known as SMS providers.

OfficeStatus comes with a large number of SMS providers already built in, but admins may occasionally need to manage them. For example, an SMS provider gateway address may change, or the specific provider that your company needs may not be present.

To edit or remove an SMS provider entry, click the Edit or Delete links (respectively) adjacent the provider of interest.

You can also click the New SMS Provider button to create new entry.

Changes to available SMS providers will be reflected during user contact information editing operations.

Tip: When OfficeStatus sends text messages through an SMS provider, it will send the email message to [SMSNumber]@[ProviderAddress]. In nearly all cases, an SMS provider gateway address will be in the form of a fully qualified domain name (e.g. "mobile.celloneusa.com").

5.3 Company

The topics described in this help chapter relate to the configuration of OfficeStatus within the organizational unit.

5.3.1 Information

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

Company Name - When specified, the Company Name is displayed in the title bar of OfficeStatus Windows Client installations and in the header of the web interface.

Company Hyperlink - When specified, causes the Company Name (described above) to be hyper-linked (applies to web interface only).

Contact Information - When specified, the contents of this field are displayed whenever a user's contact information is viewed.

Policy Information - When specified, the contents of this field are displayed whenever a user's contact information is viewed.

5.3.2 Announcements

OfficeStatus Announcements provide a means of communicating time-sensitive information to OfficeStatus users. They are visible (in a fairly prominent manner) through both the Windows and web end user interfaces.

Announcements are managed by navigating to *Administration >> Company Announcements* in the web-based interface.

Announcement Properties

Title - Used as the subject for the announcement.

Start Date - The date and time that the announcement will become visible to end users.

End Date - The date and time that announcements will cease to be visible to end users.

Location - When specified, constrains visibility of the announcement to a specific location.

Announcement - The text of the announcement that will be displayed to end users.

5.3.3 Work Schedule

The OfficeStatus company 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 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).

Relationship to User Work Schedule

If a user has not yet set their work schedule, it will default to that of the company work 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.

You can also use the "Replace any existing user work schedules with that specified above" check box option to overwrite any previously established user-level work schedules with the company work schedule.

5.4 Status

About Statuses

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.

You can create as many different statuses as your organization requires, each with its own status image, status type, etc.

The primary status indication of a user is combined with other, optional status attributes such as *Due Back* and *Status Comments* to allow for considerable overall flexibility in how the system is used.

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".

Built-In Statuses

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, even by OfficeStatus

system administrators, but they can be changed (e.g. renamed, re-ordered, or assigned a different status image).

5.4.1 Statuses

To manage the statuses available to OfficeStatus users, navigate to Administration >> Status >> Statuses.

A listing of existing statuses will appear, along with Edit and Delete action buttons for each.

Editing a Status

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.

Statuses have the following editable properties:

- **Type** - A status type ("In", "Out", or "Unavailable"). Status types are described in more detail here.
- **Name** - A short, descriptive name such as "Unavailable" or "At Lunch". Status names must be unique.
- **Display Order** - Used to control the order in which statuses are shown to end users, with lower numbers appearing first; statuses with the same display order will be sorted by name.
- **Alias** - A shortened form of the status name, used exclusively by the Email Status Updates feature. Status aliases must be unique.
- **Allow Scheduling** - Controls whether users can schedule status changes (for this status) to occur in the future.
- **Allow Recurrence** - Determines whether scheduled status changes (for this status) can make use of recurrence features.
- **Require Due Back** - This setting can require users to enter due back information whenever they change to this status.
- **Status Image** - A small (16x16) status indicator icon.
- **Foreground Color / Background Color** - Used to determine colors applied to status; the status type color will be used by default

Custom Status Images

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

1. Develop or acquire 16x16 status images in GIF or PNG format. Images must meet the following requirements (otherwise they will be ignored):
 - a. Status images must be 16x16 in size.
 - b. Status images must be either GIF or PNG format, and should also have a transparent background.
 - c. Status images cannot be larger than 10KB in size.
 - d. Status image file names cannot exceed 50 characters in length.
2. Place status images 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.

Due Back Defaults

Due back defaults allow admins to specify a default due back time for any given status.

Default due back times can be overridden by users during normal status change operations (quick status changes will always use them). The Offset By field allows you to specify a due back time that occurs in the future. For example, a Vacation status could have a default due back time of 9:00 am and an offset of 7 days. In another example, a Lunch status might leave the due back time blank and specify an offset of 1 hour.

Status Deletion

The act of deleting a status (by an OfficeStatus system administrator) can affect other system areas (such as user or site status schedules) that depend upon its existence.

In such cases, the system will automatically revert to use the base status type of the status that was deleted.

For example, a site status schedule may be configured to change the status of all users at a given time each day. If that target status is then deleted, its *base type* will then be used by any related status change operations.

5.4.2 Status Type 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

When you change the colors associated with a status type, it will also affect any newly created custom statuses of that type.

5.4.3 Comment Library

Status Comments are simple, descriptive snippets of text that end 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 (web or Windows client) status board interface.

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

To manage status comments, navigate to *Administration >> Status >> Comment Library*.

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.

5.4.4 User Inactivity Monitor

OfficeStatus Server offers a server-side user inactivity monitoring system that is designed to supplement client-side status event handling.

Client vs Server Inactivity Monitoring

OfficeStatus Windows Client offers a range of presence sensing capabilities that can trigger status changes in users. OfficeStatus refers to these as "Status Events", and they can be configured server-side from the Client Settings page.

Client side presence detection works only if the desktop client is running when the status even occurs. For example, OfficeStatus Windows Client can change the user's status when their OS shuts down or if the user goes idle. However, if OfficeStatus Windows Client isn't running when these changes occur, it will not be able to report them to the server.

When enabled, server-side inactivity monitoring functions as follows:

- "Heartbeat" requests are periodically sent from OfficeStatus client interfaces (Windows, web, and mobile web)
- OfficeStatus will change the status of users that haven't transmitted a heartbeat in a specified (configurable) period of time

Client Heartbeats

As mentioned above, all OfficeStatus client interfaces (Windows desktop, web, and mobile web) transmit periodic "heartbeat" requests to OfficeStatus Server.

Since the transmission of these heartbeats are integral to how server site user inactivity monitoring works, we'll make the following observations about their continuity:

- For OfficeStatus Windows Client, heartbeats continue transmitting as long as the program and host machine are running.
- For the OfficeStatus web interface, heartbeats continue transmitting as long as a page is actively running in the user's browser.
- Conditions such network outages and server downtime can result in heartbeats failing to reach the server.

Important Considerations

1. Server-side user inactivity monitoring is best used in environments where end user workstations are shutting down, sleeping, or being logged out of at the end of each work day.

2. Server-side monitoring runs at all times. If a client interface isn't transmitting heartbeat requests, the user's status will be affected unless that status is locked.
3. Locking a user's current status (right-click their status and choose "Toggle Status Lock") will prevent server inactivity monitoring from changing it. Note that admins can disable status lock features for normal users, if desired.
4. For best results, OfficeStatus Windows Client users should be running v6 or later.
5. The OfficeStatus Maintenance system service *must* be running in order for server-side user inactivity monitoring (and many other OfficeStatus features) to function as intended.

5.4.5 Site Status Schedules

OfficeStatus provides the ability to schedule system-wide end user status changes via Site Status Schedules.

To create or edit site status schedules, navigate to *Administration >> Status >> Site Status Schedules*.

Use the New Site Status Schedule button to create a new entry, or click the Edit link of an existing entry.

Site Status Schedule Editor

Site schedules have the following editable attributes:

Informational Properties:

- **Enabled** - Allows a site status schedule to be disabled (e.g. deactivated) without removing it entirely.
- **Name** - Provides a means of identifying a site status schedule.
- **Status** - The target status which users will be assigned when the site status schedule executes.
- **Clear User Comments** - Set to "Yes" to clear user status comments when the site status schedule executes.
- **Clear Due Back** - Set to "Yes" to clear user due back information when the site status schedule executes.
- **Start Date** - The date on which the site status schedule will first run.
- **Time** - The time of day when the site status schedule will execute.
- **Days of Week** - If the site status schedule is to recur, select the days of the week. If no Days of Week are selected, the site status schedule will be executed only once (at the specified start date/time).
- **Statuses of Type** - Allows you to select which status types will be affected. Please keep in mind that *all* statuses derive from one of the three base status types.
- **Users In** - Allows you to restrict the scope of the site status schedule to a specific location.

Important Notes

1. Site status schedule execution does not impact any user's ability to alter their status. For example, if you were to define a daily site status schedule that sets the status of all users to "Out" at 5pm, users can still alter their own status after this event occurs.
2. If a status is deleted after being assigned to a site status schedule, the system will automatically downgrade the target status to one of the three base status types.

3. Execution of site status schedules (as well as user status schedules) is performed by the OfficeStatus Maintenance system service. This system service must be running in order for scheduling to occur.

5.4.6 Status History Editor

Every time an OfficeStatus user's status changes, a user status history record is created in the OfficeStatus database. This data, in turn, is used to generate the User Status History and User Time Card reports.

The Status History Editor allows OfficeStatus administrators to manage the status history data of one or more users.

User Status History Record Properties

Each user status history record presented in the status history editor displays the following properties.

- **Status** - The status to which the user was changed.
- **Start** - Correlates to the date and time the status change occurred.
- **End** - Correlates to the *start date and time of the entry that follows* (or the current date/time if the last record for the user).
- **Changed By** - Indicates which user initiated the status change. Will display as "[Scheduler]" if the change was initiated by a scheduled event.
- **IP Address** - Shows the IP address from which the user status change originated.
- **Source** - Shows the client (end user) interface used to initiate the status change. Valid sources include:
 - "WindowsClient" - Status change originated from an OfficeStatus Windows Client installation.
 - "Web" - Status change originated from the normal (non-mobile) web interface.
 - "MobileWeb" - Status change originated from the mobile web interface.
 - "MaintenanceService" - Status change originated from the OfficeStatus maintenance service, usually in response to a scheduled status change.
- **Status Comments** - Shows the comments associated with the status change, if any.

Editable Properties

When editing or inserting a user status history record, you will be able to specify the *status*, *start date/time*, and *status comments* properties.

Tip: To affect the end date of a specific record, modify the start date and time of the record that follows it.

Editing and Deleting Records

To edit or remove one or more user status history records, first select a user, start date and time, and end date and time from the Criteria section of the page - then click the Retrieve Status History Records button.

You will be presented with a table of status history records for the given user, within the specific time frame.

You can now click the Edit or Delete link associated with a given entry in order to edit or remove it, respectively.

To commit a change, click the Update button (or Cancel to discard the change).

Inserting New Records

To create a new user status history record, click the Insert New Record button. A new record will be created, and you will begin editing it.

To commit the new record, click the Insert button (or Cancel to discard).

5.4.7 Custom Status Fields

OfficeStatus supports the use of custom status fields that can be used to describe specific data elements associated with a user's status.

To create or edit custom status fields, navigate to *Administration >> Status >> Custom Fields*.

When one or more custom status fields are defined, users will have the ability to view those fields in either the Windows Client or web interface status boards. Custom fields that are specified as being visible by default (see below) will appear automatically in user status board listings; otherwise users can use status board column customization features to expose them.

Users will also have the ability to populate custom status fields during full status change operations (again, using either the Windows Client or web interfaces).

Managing Custom Status Fields

Use the New Custom Field button to create a new custom status field, or click the Edit link of an existing field.

Custom Status Field Editor

The custom status field editor exposing the following properties:

- **Field Type** - Determines the type of field that will be presented to users when they populate the custom field.
- **Name** - The name of the field, as presented to end users when they populate the custom field.
- **Required** - During full status changes, end users must provide data for required custom fields.
- **Enabled** - Enables or disables the custom field.
- **Visible by Default** - When engaged, this setting will cause the custom field to be visible by default in user status board displays.

Important: *When a custom field is specified as required, that requirement is only enforced during full user status changes. Since quick status changes present no user interface, they cannot honor custom field requirements.*

5.4.8 Email Status Updates

OfficeStatus supports the updating of user statuses via email. This feature allows users to send quick status updates to OfficeStatus from any device that supports the ability to send email messages.

To enable and configure this capability, navigate to *Administration >> Status >> Email Status Updates*.

How it Works

Email Status Updates work through the use of standard email protocols. Users will send status update messages to a dedicated OfficeStatus email account (via SMTP) using their preferred mail client, and OfficeStatus Server picks them up and processes them using the IMAP protocol.

When OfficeStatus Server collects status update emails via IMAP, it attempts to match the "from" address of each message to an OfficeStatus user account. If a match is found and the email subject line can be parsed correctly, the user's status is changed accordingly. If a matching user is found but the email message subject cannot be parsed, OfficeStatus will send the user an error notification email.

Requirements and Preparations

Preparing to use OfficeStatus Email Status Updates feature involves the following steps:

1. Create a dedicated email account for use by OfficeStatus for the purpose of supporting Email Status Updates. You can create this email account on your corporate mail server, on GMail, etc. Ensure that IMAP support is enabled for the account.
2. Ensure that each OfficeStatus user has an email address assigned to their account profile. These email addresses will be used to match inbound status update email messages, so please double-check them for correctness.
3. Configure the OfficeStatus Email Status Updates feature (details below).
4. Test the feature by sending a correctly formatted email (details below) to the email account you created in step 1.

Configuration

The following Email Status Update configuration fields are available.

- **Enable Status Updates via Email** - By default, this feature is disabled, so you'll first need to enable it here.
- **IMAP Server Address** - The fully qualified host name or IP address of your IMAP server (i.e. *imap.gmail.com*).
- **Use SSL** - When enabled, connections to the above IMAP server address will be made securely (using SSL/TLS). Many modern mail servers (including GMail) require the use of secure IMAP connections.
- **Username** - Enter the username of the email account to which status update email messages will be sent. In many cases, this username will be the same as the account's email address. As noted above, this account must be used exclusively by OfficeStatus in support of the Email Status Updates feature.
- **Password** - The password associated with the above IMAP account.
- **Move Processed Messages To** - When specified, processed status update email messages will be moved into this IMAP folder after being processed (successfully or otherwise). Use of this field is not required, but is strongly recommended.

Once you've configured the above fields, use the Test Connection button to ensure proper connectivity to your IMAP account.

Important: When collecting email messages via IMAP, OfficeStatus Server will only process unseen messages in the account's inbox. However, as an added safeguard we strongly recommend the use of the "Move Processed Messages To" option to limit inbox growth. For example, a common strategy is to move processed messages directly to the Trash (i.e. [IMAP]/Trash) folder.

Composing and Formatting Status Update Emails

In order to be processed correctly by OfficeStatus, status update emails must follow a simple set of formatting rules.

Firstly, the email must be sent to the dedicated OfficeStatus Email Status Updates email account created in Step 1 of the "Requirements and Preparations" section above.

Secondly, the email message's **subject line** must include the user's desired target status, and may also optionally include a due back and status comment information. The email subject format is as follows:

```
[Status Name] [Due Back Date/Time] [Status Comments]
```

Of the above, only the Status Name is required - the due back and comment information is optional. Now let's look at each of these parts more closely.

1. Status Name - This must precisely match either the full name of an existing status, or it's alias.
2. Due Back Date/Time - This value can either be relative (i.e. "1 day") or absolute (i.e. "2pm"). Relative times can be specified as X min/minute/minutes/m, X hr/hour/hours/h, or X day/days/d.
3. Status Comments - Any data that can't be parsed as a status or due back date/time will be used as a status comment.

OfficeStatus uses a very flexible parser to extract due back date/time information. For example, all of the following accomplish the same result:

Ex 1: "Out 30m"

Ex 2: "Out 30 min"

Ex 3: "Out 30minutes"

Ex 4: "O 30m"

Note that in example 4 above, it is that "O" is specified as the alias for the "Out" status. You can specify aliases for statuses via the Status Editor.

Here are another set of examples, all of which indicate that the user will return tomorrow at 9am with a comment of "call my cell":

Ex 1: "Out 1d 9am call my cell"

Ex 2: "O 1 day 9:00 call my cell"

Ex 3: "Out 8/16/2014 9:00am call my cell"

Note that if even if the user composed a due back date/time that was somehow invalid, the portions of the subject line that could not be interpreted would simply become part of the user's current status comment.

If the due back/date time refers to a date/time that occurs in the past (ex: a user sends "Out 9am" at 3pm in the afternoon), the due back date will automatically be shifted to the following day.

Important: OfficeStatus will parse only the subject line of inbound status updates. Other message parts (such as the message body) will be ignored.

5.5 Resources

OfficeStatus provides support for managing the status of company resources such as vehicles, rooms, equipment, etc.

In OfficeStatus, resources are treated in a fairly open and transparent manner. Any user can create resources, and any user can change the status of a resource.

However, the ability to edit or delete resources is limited to the following users:

- The OfficeStatus user that originally created the resource
- Members of the system administrator role
- Members of the department manager role that are within the same department as the creator of the resource

5.5.1 Resource Types

Resource types represent a category of resources.

To create or edit resource types, navigate to *Administration >> Resources >> Resource Types*.

A number of resource types are predefined, including "General", "Room", etc. The predefined resource types can be removed or customized to suit your organizations needs, or can create new ones.

Managing Resource Types

Use the New Resource Type button to create a new resource types, or click the Edit link of an existing type.

Resource Type Editor

The following properties are exposed by the resource type editor:

- **Name** - The resource type name.
- **Image** - A default image for this resource type. This image will be shown whenever a resource of this type doesn't have its own specific image.

5.5.2 Resource Statuses

A resource status represents the current state and availability of a resource. You can create as many custom resource statuses as your organization requires.

To create or edit resource statuses, navigate to *Administration >> Resources >> Resource Statuses*.

There are three built-in resource status types: Available, In Use, and Out of Service. These built-in resource status types **cannot be removed**, as they provide a fallback for cases where custom resource status types are deleted.

Managing Resource Statuses

Use the New Resource Status button to create a new resource status, or click the Edit link of an existing status.

Resource Status Editor

The resource status editor exposes the following properties:

- **Type** - The type of resource status, as managed in Resource Types. The type of built-in resource statuses cannot be edited.
- **Name** - The name of the resource status.
- **Display Order** - Determines the order of presentation to end users, with lower numbers appearing first. Entries with the same display order will be sorted by name.
- **Require Due Back** - Enabling this setting will require users to enter due back information when changing a resource to this status.
- **Foreground Color** - The color of the status text, as presented to end users.
- **Background Color** - The background color of the status, as presented to end users.

5.5.3 Resource Status History Editor

Every time an OfficeStatus resource's status changes, a resource status history record is created in the OfficeStatus database. This data, in turn, is used to generate the Resource Status History report.

The Resource Status History Editor allows OfficeStatus administrators to manage the status history data of one or more resources.

User Status History Record Properties

Each user status history record presented in the status history editor displays the following properties.

- **Status** - The status to which the user was changed.
- **Start** - Correlates to the date and time the status change occurred.
- **End** - Correlates to the *start date and time of the entry that follows* (or the current date/time if the last record for the user).
- **Changed By** - Indicates which user initiated the status change. Will display as "[Scheduler]" if the change was initiated by a scheduled event.
- **Status Comments** - Shows the comments associated with the status change, if any.

Editable Properties

When editing or inserting a resource status history record, you will be able to specify the *status*, *start date/time*, and *status comments* properties.

Tip: To affect the end date of a specific record, modify the start date and time of the record that follows it.

Editing and Deleting Records

To edit or remove one or more resource status history records, first select a resource, start date and time, and end date and time from the Criteria section of the page - then click the Retrieve Status History Records button.

You will be presented with a table of status history records for the given resource, within the specific time frame.

You can now click the Edit or Delete link associated with a given entry in order to edit or remove it, respectively.

To commit a change, click the Update button (or Cancel to discard the change).

Inserting New Records

To create a new resource status history record, click the Insert New Record button. A new record will be created, and you will begin editing it.

To commit the new record, click the Insert button (or Cancel to discard).

5.6 Tools

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

- Active Directory User Import
- System Alerts
- Send Feedback

5.6.1 Excel User Import

OfficeStatus has the ability to import users from an Excel spreadsheet. To begin the process, navigate to *Administration >> Tools >> Excel User Import*.

This page provides a link to the OfficeStatus user import Excel spreadsheet template. If you haven't already, download the template and open it in MS Excel. Required fields are marked with an asterisk.

Once you've populated the spreadsheet with data, save it (in .xls file format) somewhere on your computer. Then use the Choose File button to browser for it.

Password Assignment

The following password assignment options are presented:

- Use the passwords entered into the Excel template - Will import the password precisely as they're entered in the user import spreadsheet.
- Automatically generate (strong) random passwords - Will generate random passwords for each user imported. The resulting passwords will be displayed after import completed.
- Set account passwords equal to account names - Sets each user's password equal to their assigned username.
- Don't require password matches - No passwords will be assigned during user import, and the "require password" match option will be set to false for each user.
- Set every password equal to - Allows you to specify a single password to assign to all users.

When ready, click the Import Users button.

When the import completes, you'll be presented with a list of imported users (including their passwords, if applicable).

5.6.2 Active Directory User Import

OfficeStatus has the ability to import users from an existing Windows Active Directory store. To begin the process, navigate to *Administration >> Tools >> Active Directory 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 LDAP path** - When checked, Active Directory LDAP queries will use the specified path.
- **Specify Filter** - Used to narrow down the scope of the LDAP query used to retrieve users.
- **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.

LDAP Filter Examples

As mentioned above, you can specify a filter for importing specific subsets of users via the Active Directory User Import tool. The search filter syntax is compliant with RFC2254.

Here are a few quick examples of practical LDAP filters you may want to use:

Match all users with a name containing "admin":

```
(&(objectClass=user)(cn=*admin*))
```

Match all users but "andy":

```
(&(objectClass=user)(!(cn=andy)))
```

Members of the "sales" group in the "contoso.local" domain:

```
memberof=CN=sales,CN=users,DC=contoso,DC=local
```

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** to ensure that you have a copy of any auto-generated passwords, etc.

5.6.3 Message Broadcast

The Message 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 *Administration >> Tools >> Message Broadcast* and use the Membership section of the screen to define which OfficeStatus users should receive the message.

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

5.6.4 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.

5.6.5 Log Viewer

The OfficeStatus Log Viewer tool allows admins to view log files generated by the product.

There are two log file types in use by OfficeStatus:

1. **Primary** - Logs events relating to use of Windows Client, the web interface, etc.
2. **Maintenance service** - Logs events associated with the OfficeStatus Maintenance Service. Such events will usually relate to background operations such as scheduled status changes, queued email transmission, etc.

Select the log type you'd like to view from the first drop-down box, and then select the specific log file you wish to view from the second drop-down box. Click the View Log button.

By default, only error and warning log messages are shown. Use the "show levels" checkboxes to configure which logging event levels are included.

5.7 Help

The following Help features are available:

- Admin Guide
- Registration
- About

5.7.1 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.

5.7.2 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 >> Help >> 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.

5.7.3 Release Notes

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

5.7.4 Send Product Feedback

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

We look forward to receiving your comments, suggestions, and feature requests.

5.7.5 Admin Guide

Opens this administrative guide help file.

6 Public View

6.1 About the Public View

The OfficeStatus Public View provides a read-only, web-based view of the status of users within the system.

The Public View feature makes it easy to provide read-only user status access to guests, or to create a public (large-screen) user status display in a central office location, meeting room, etc. It also enables integration of a read-only status view within external systems such as Microsoft SharePoint (which has the ability to display external websites via the addition of a Page Viewer Web Part).

Accessing the Public View

In order to use the Public View, it must first be enabled. This is done within the Enable or Disable Features system configuration page.

Once enabled, the Public View can be accessed via the same URL that you normally use to access the OfficeStatus web interface, but with "/public" appended. For example:

```
http://my-server/OfficeStatus/public
```

Security Considerations

It's important to note that the OfficeStatus Public View is accessible to anyone (via web browser) with network access to OfficeStatus Server. In other words, **no authentication is required** in order to access the Public View via a web browser.

Although the OfficeStatus Public View is read-only and exposes a fairly minimal amount of information (current status of employees), you may wish to consider potential security implications for your organization - particularly if your OfficeStatus Server installation is accessible via the Internet.

6.2 Integration with External Systems

The OfficeStatus Public View can be integrated into external systems such as Microsoft SharePoint.

For example, in the case of MS SharePoint you may elect to create a Page Viewer Web Part that then exposes the read-only OfficeStatus Public View directly to SharePoint users. Other employee collaboration platforms (or even private Intranet applications) may offer similar integration opportunities.

The OfficeStatus Public View exposes a handful of query string parameters that may be used during such integration efforts, including:

- **Dept** - Enter the specific department you'd like to see in the public view.
- **Location** - Specify the location (by name) you'd like to see in the public view.
- **Status** - Specify the status (by name) you'd like to see in the public view.
- **ShowUserImages** - Turn this off ("false" or "0") to disable the display of user images.
- **DisplayMode** - Set this to "Tile" for tile mode, or "Table" for table mode.
- **TileSize** - Can be any of the following: "Small", "Medium", "Large" or "ExtraLarge"
- **AutoScroll** - Set this to "false" or "0" to disable automatic scrolling.
- **Sort** - Set to one of the following values: "LastName", "FirstName", "DueBack", or "StatusName"
- **SortAsc** - Set this to "false" or "0" to sort descending (otherwise ascending).
- **FixedWidth** - Set this to "false" or "0" to allow tiles to stretch to accommodate their contents.

Here's an example URL that uses some of the above query parameters:

```
http://my-server/OfficeStatus/public/Default.aspx?  
Dept=IT&Status=In&ShowUserImages=false
```

7 Mobile Device Support

7.1 About Mobile Device Support

OfficeStatus is accessible to mobile devices through its web interface. This design has many advantages, perhaps the most important of which is broad mobile device support. The OfficeStatus mobile web interface is accessible to nearly any mobile device that runs a modern web browser with reasonable Javascript and CSS support. The list of supported devices includes iPhone, Android, BlackBerry, Windows Phone 7 and later, newer Symbian devices, and more.

To use the OfficeStatus mobile web interface, simply enter your OfficeStatus web interface URL into the browser of any supported mobile device. When the OfficeStatus web interface recognizes that a request is coming from a supported mobile device, it will automatically render a mobile-friendly user interface.

For example, if your normal OfficeStatus web interface URL is as follows:

```
http://my-sever/OfficeStatus
```

... then accessing the above URL from a supported mobile device will automatically forward you to the OfficeStatus mobile web interface:

```
http://my-server/OfficeStatus/mobile
```

If, for some reason, the above automatic redirection does not occur, you can always elect to access the mobile URL directly (simply append "/mobile" to your normal OfficeStatus web interface URL, as demonstrated above).

Most modern mobile devices allow a web browser shortcut to be added to the device's home screen. Adding such a shortcut to the OfficeStatus web interface may make it easier for the user of that device to engage with OfficeStatus.

Features and Functions

The OfficeStatus mobile web interface offers a subset of the functions available to the normal web and/or desktop client interfaces.

Available features include:

- View and change user status
- View the status of watched users
- View user contact details
- Send and receive messages
- View company announcements

To learn more about how to use the mobile web interface, log into it with a supported device and then click the Help button.