OfficeStatus Windows Client User Guide

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1 Introduction

1.1 Introducing OfficeStatus Windows Client

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

OfficeStatus is a software product that allows members of your organization to communicate their status and availability to other users, regardless of geographic distribution.

OfficeStatus provides a wide range of benefits:

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

OfficeStatus Windows Client can be used from any workstation with a network connection to the organization's OfficeStatus server. Advanced, standardized web service protocols are used to ensure that it works across a local area network, a wide area network, or even the Internet.

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

1.2 Using this Help System

OfficeStatus Windows Client is designed to be easy to use and intuitive, but occasionally you may need more information about how a specific feature of the software behaves.

This help system is organized into a series of chapters and topics, all available from the navigation tree on your left. Double-click a chapter (indicated by an open book image) to see the topics associated with it, and select a topic to view its contents.

You may also use the Search and Index tabs to locate help information more quickly.

1.3 About Key Metric Software

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

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

2   Getting Started

2.1   Overview

This chapter discusses how to begin using OfficeStatus Windows Client.

2.2   Starting OfficeStatus Client

OfficeStatus Windows Client is designed to operate in the tray notification area of your Windows task bar. By default, this is the lower right corner of your desktop.

OfficeStatus Windows Client will run automatically when your operating system starts (unless you change this behavior within user preferences). Starting OfficeStatus Windows Client manually (by selecting it from the Start menu) is generally only necessary if you previously decided to close OfficeStatus Windows Client, or if your system is configured not to start it automatically.

At any time, you can double-click the OfficeStatus Windows Client icon in your tray notification area, which will trigger the display of the main application window. You can also right-click on this OfficeStatus Windows Client icon to execute a number of shortcut operations without bringing up the main application window.

Note: You cannot start up more than one instance of OfficeStatus Windows Client at a time. If you attempt to start a second instance of OfficeStatus Windows Client while another is already running, the previous instance will come to the foreground instead.

2.3   Signing In

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

Sign-In Information

When you encounter the sign-in window, enter the OfficeStatus username and password provided to you by your system administrator into the corresponding boxes on the screen. Then click the Sign In button to proceed.

If you don't know your OfficeStatus username, click the Select hyperlink button next to the username input field to display a listing of all active OfficeStatus users. You can then select your username from the list.

Note: If the Service Address field is blank when your login Window appears, contact your system administrator and ask what you should enter. Once entered, OfficeStatus Windows Client will automatically remember this value for future login sessions.

Options

- Remember my password - Check to allow OfficeStatus Windows Client to remember your password for future sign-ins.

- Sign me in automatically - Check to have OfficeStatus Windows Client automatically sign you in during future start-ups.

Note: If previously remembered username and password authentication details suddenly begin to fail, it's possible your system administrator has changed one or both values.

Offline Sign-In Behavior

OfficeStatus Windows Client launches in a special manner when all of the following are true:

- OfficeStatus Windows Client is being launched as the result of system startup
- Automatic sign-in is enabled (which, in turn, requires that "Remember my password" be enabled)
- A connection to OfficeStatus Server cannot be established

When all of the above are true, the sign-in window will minimize itself to the system tray and show a balloon notification message in the event of connectivity failure

Users can then double-click the OfficeStatus offline status indicator icon in the system tray to resume or cancel login.

This behavior helps to provide seamless support for occasionally disconnected computing scenarios.

3 Concepts

3.1 Overview

This chapter covers the fundamental operational concepts of OfficeStatus.

Please review the contained topics if you need a more thorough understanding of how the system works as a whole.

3.2 User Statuses

User Statuses within OfficeStatus are a reflection of the status and availability of a user.

There are three core *status types* built into OfficeStatus:

- **In** - User is in the office and available
- **Out** - User is out of the office
- **Unavailable** - User is in the office, but is unavailable

OfficeStatus associates a color with each of the three major status types defined above. By default, these colors are green, yellow, and red (respectively), but they can be changed by an OfficeStatus system administrator.

OfficeStatus also has a number of *more specific* statuses, each of which falls into one of the more general status types defined above. These specific (custom) statuses can also have their own colors.

Although a number of defaults are provided, your OfficeStatus system administrator(s) may add or remove custom statuses based upon the needs of your organization.

3.3 Departments

Departments are the fundamental organizational unit for users within OfficeStatus, and are synonymous with the concept of user groups.

Departments are represented within OfficeStatus Windows Client as a series of tabs (attached to the user status display) on the main screen.

Note that the management of available departments (and the assignment of OfficeStatus users to them) is the responsibility of your OfficeStatus system administrator.

3.4 Locations

Locations are additional units of 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.

Locations are represented within OfficeStatus Windows Client through the use of a drop-down selection box in the main window.

Note that the management of available locations (and the assignment of OfficeStatus users to them) is the responsibility of your OfficeStatus system administrator.

3.5 Role-Based Security

OfficeStatus offers a simple yet robust role-based security model that affects each user's ability to:

- Change the status of other users (including status watches, etc.)
- Change contact information of other users
- View reporting information associated with other users

All OfficeStatus users are allowed full access to their own status, contact information, and reporting data. A user's ability to change this information for *other users* depends upon their role membership.

OfficeStatus Roles

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

- **System Administrator** - Members of this role have access to every functional area in the system.
- **Receptionist** - Members of this role can modify the status and contact information of any user, but cannot alter core system settings.
- **Department Manager** - Members of this role can modify status and contact information for any user in the same department.
- **Normal (No Role Assignment)** - Normal users can modify their own status and contact information and can view the status, contact, and status schedule information of others.

OfficeStatus users can be members of more than one role, in which case the permissions are effectively combined.

Only OfficeStatus system administrators can change a user's role membership.

4   The Main Screen

4.1   Overview

The OfficeStatus Windows Client user interface was designed to be highly flexible, customizable, and intuitive.

It is comprised of a number of key components, including a top-level main menu, one or more toolbars, a user status board, and more.

This chapter covers the OfficeStatus Windows Client user interface in detail.

4.2   Main Menu

The OfficeStatus Main Menu is broken down into the following categories:

- **File** - groups traditional file access functions such as:
  o Print - Allows for printing of the user status board.
  o Print Preview - Shows a preview of the user status board printout.
  o Export to Excel - Exports the user status board contents to MS Excel file format.
  o Export to PDF - Exports the user status board contents to PDF file format.
  o Web Interface - Allows you to log into the OfficeStatus web interface.
  o Sign Out - Signs you out of OfficeStatus Windows Client.
  o Shut Down - Shuts down OfficeStatus Windows Client.

- **View** - provides access to visibility of items in the user interface:
  o Refresh - Refresh the user status grid contents.
  o Location - Allows you to filter the current user status view by location.
  o Show Overdue Only - When toggled on, only overdue entries will appear in the user status board.
  o Search - Quickly find a specific user by name, extension, job title, and more.
  o Mini View - A special user status visualization mode that minimizes on-screen information.
  o Show Unread Notes Panel - Toggles visibility of the unread notes panel.
  o Show Status Watches Panel - Toggles visibility of the status watches panel.
  o Show Announcements Panel - Toggles visibility of the announcements panel.
  o Show Status Types by Department Panel - Toggles visibility of the status types by department panel.
  o Show Main Toolbar - Toggles visibility of the main toolbar.
  o Show Selected User Toolbar - Toggles visibility of the selected user toolbar.
  o Full Screen Mode

- **Status** - provides access to key OfficeStatus Windows Client capabilities:
  o My Status - View and manage your current status.
  o Quick Status Change - Quickly change your current status.
  o Multiple User Status Change - Change the status of multiple users at once.
  o User Status Calendar - Calendar view of user statuses.
  o My Status Watches - View and manage your status watches.
  o My Status Schedule - View and manage your status schedule.

o Calendar Sync - Synchronize your OfficeStatus status schedule with your Outlook calendar.

- **Company** - provides access to company related settings and features:
  o Company Info - Displays basic company information.
  o Announcements - View company announcements.
  o My Contact Info - View your contact information.
  o Organizational Tree - Shows hierarchical relationships between users.
  o Phone List - Presents a listing of primary phone and/or extension data per user.

- **Messages** - shows message-related features and functions:
  o My Messages - Read and manage your messages.
  o Compose - Compose and send a message to another user.
  o Text Message - Compose and send text messages to other users.

- **Resources** - provides access to functions relating to resource management.
  o Resources - View and manage resources and their statuses.
  o Resource Calendar - Calendar view for resource statuses.
  o New Resource - Create a new resource.

- **Preferences** - contains quick access to several customization functions:
  o My Preferences - Manage your preferences.
  o User Status Board - User status board configuration options.
  o Lock Toolbars - Locks or unlocks the main window toolbars.

- **Reports** - provides access to built-in reports:
  o Employees - Employee summary report, with contact information.
  o Departments - Departmental overview report.
  o Locations - Location overview report.
  o Emergency Plan - Emergency plans for each user.
  o User Arrival Times - Arrival times for users across a given time span.
  o User Time Card - Provides breakdown of hours in select status(es) per day.
  o User Time in Status - Provides breakdown of user time in each status.
  o User Status History - Detailed user status change history report.
  o User Status Schedule - Detailed user status schedule report.
  o User Status Watch - Find out who's watching status changes for a given user.
  o Status Summary - Shows the number of users in each status.
  o Resource Status History - Details resource status change history report.

- **Help** - contains menu items relating to user assistance:
  o Help Contents - Provides access to this help file.
  o Index - Indexed view of the current help file.
  o Search - Allows for searching of this help file.
  o About - More information about your OfficeStatus Windows Client installation.

The capabilities accessible via these Main Menu entries are described within the remainder of this guide.

4.3   Main Toolbars

There are two primary toolbars in the OfficeStatus user interface.

In their default order (which can be modified if you unlock the toolbars via Customize menu), the toolbars are:

1. **Main Toolbar** - The top toolbar provides quick access to the most commonly used capabilities of OfficeStatus Windows Client.
2. **Selection Toolbar** - The buttons available in the bottom toolbar apply to the user currently selected in the drop-down box on the left. It can also be used to change the selected location. **This toolbar is hidden by default**, and can be made visible via the main menu (View | Show Selection Toolbar).

Either toolbar can be customized to varying degrees by right-clicking anywhere in the toolbar area. Customization options include everything from hiding / showing the toolbars to controlling the precise arrangement of buttons.

4.4 Department Tabs

Departments are defined by OfficeStatus administrators, and appear near the top of the OfficeStatus Windows Client user interface.

Clicking on a department tab will update the User Status Board so that only members of the selected department appear.

Users can modify their departmental membership within the user contact information window.

Note: The "Everyone" department is automatically created by OfficeStatus and will always include all users defined within the system, regardless of department.

4.5 Location Selection

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.

Changing this drop-down box selection will effectively filter out OfficeStatus users not at the chosen location. Selecting "All Locations" within this drop-down box will show all users, regardless of location.

Users can modify their location within the user contact information window.

4.6 Full Screen Mode

OfficeStatus Windows Client supports a simple full-screen mode, which can be initiated by selecting View | Full Screen Mode from the main menu (or hitting the F11 key).

The goal of full-screen mode is to make the user status grid consume as much of the primary monitor as possible. Toward that end, activation of full-screen mode hides all application toolbars and docking panels.

To exit full-screen mode, press the F11 key.

Full Screen Mode Tips

Interested in showing a large number of user statuses on-screen at the same time in combination with full-screen mode? Try the following steps:

1. Turn on Mini View mode (located in the Preferences | User Status Board menu).
2. Use Preferences | User Status Board | Font Size to set a large font size (the best size will depend upon the monitor - try a size of between 15 and 20 to start).

Once these steps are completed, hit F11 to enter full-screen mode. You can then use your mouse to resize the mini view "cards" if you wish.

4.7   User Status Board

4.7.1   Overview

The OfficeStatus Windows Client user status board acts as a kind of office dashboard for your organization, providing a wealth of status and availability information in a compact and highly interactive display.

Which users appear on the status board is determined by the currently selected department tab, as well as the current location selection.

The status board provides a number of useful functions, including:

- Printing capability
- Exporting in various formats
- A rich context (e.g. right-click) menu
- Numerous customization options
- Row filtering
- Mini view mode

4.7.2   User Search

You can quickly find a specific OfficeStatus user by clicking the Search button in the main window toolbar.

This will cause a Search panel to appear on the left hand side of the main window. Here, you can use a range of fields (such as name, extension, job title, status comments, etc.) to narrow down (e.g. filter) the users listed in the user status grid.

To close the user search tool, click the Search toolbar button a second time. Closing the search area will clear any user search criteria currently in affect.

4.7.3   Printing

The OfficeStatus Windows Client User Status Grid includes rich printing (and print previewing) support.

Click the Print Preview button in the main toolbar, and you will be presented with a rich print preview window offering a range of abilities:

- Printing and page setup capability
- Dynamically generated page thumbnails
- Zooming (by percentage, via DynamicZoom, and page based)
- Easy multi-page navigation
- A snapshot tool for copying print sections to the Windows clipboard
- A hand tool for dragging around the print preview window

- Numerous page layout options

Once you've got things the way you like them, click the Print button in the preview window toolbar, and the printout is produced. The final output is highly comparable to the on-screen representation of the User Status Grid.

You can also use the Print button to skip the previewing process described above. You will be prompted only to choose a destination printer.

4.7.4 Exporting

You can export the data contained within the User Status Board by selecting one of the following items from the File section of the main menu:

- **Export to Excel** - Produces a Microsoft Excel (.xls) export file. *
- **Export to PDF** - Produces an Adobe Acrobat (.pdf) export file.

Doing so will prompt you for the location to which you'd like to save the resulting export file.

* You must have Microsoft Excel (or the Microsoft Excel Viewer) installed on your computer in order to view the contents MS Excel files.

Note: Export functions are not supported when the user status board is being displayed in Mini View mode.

4.7.5 Context Menu

Right-clicking on a user within the User Status Grid will reveal a context menu with a number of user-specific shortcuts.

Context menu functions include:

- **User Status** - Brings up the user status window for the currently selected user. This allows you to specify a "due back" date / time as well as provide status comments.
- **Quick Status Change** - Quickly sets the status of the selected user. Resets the "due back" and "comments" fields to blank values.
- **Status Schedule** - Allows for viewing and management of the selected user's status schedule.
- **Calendar Sync** - Provides a means of syncing the selected user's status schedule with their Outlook calendar.
- **User Contact Info** - Brings up the contact information window for the selected user.
- **Watch User's Status** - Adds the selected user to your status watch list.
- **Send User Message** - Sends a message to the selected user.
- **Send User Email** - Starts your default Windows mail client, allowing you to send an email to the selected user.
- **Text Message** - Send the selected user a text message.

Note: Some right-click menu functions may not be available, depending upon your current access rights.

4.7.6 Customizing

To customize the user status board, select Preferences | User Status Board from the main menu. A number of customization options will appear:

- **Font Size** - Can be set to small, medium (the default), larger, and large.

- **Column Chooser** - Displays a listing of all available columns available for display within the User Status Grid. Place check marks next to the columns that you would like to see.
- **Enable Column Moving** - When enabled, the columns of the user status grid can be re-organized (moved into different positions) as you see fit.
- **Enable Row Filtering** - Engages the powerful Row Filtering mode of the User Status Grid.
- **Show Tooltips** - Enables or disables the small "tip" popup bubbles that appear when you hover over a specific cell within the User Status Grid.
- **Reset Sorting** - Resets (removes) any sorting currently applies to the status board.

4.7.7   Row Filtering

The User Status Grid supports an advanced Row Filtering mode that allows users to filter its contents in a variety of ways.

To enable Row Filtering mode, select **Preferences | User Status Board | Enable Row Filtering** from the main menu. Select the same menu option again to disable Row Filtering.

Once Row Filtering mode is engaged, small filter icons will appear next to each of the column headers in the User Status Grid. Clicking on the filtering icon will show available filtering options.

For example, let's click on the filter icon for the Status column:

The filter drop-down box that appears allows you to determine precisely what values appear based upon the current status of the users in the grid. If you select the *In* status from the drop-down list, only users that are *In* will appear in the grid. Select (All) from the filter drop-down list to turn off filtering for this column.

You can also define custom filters. To do so, select (Custom) from the filter drop-down for a specific column. A custom filter definition window similar to the following will appear:
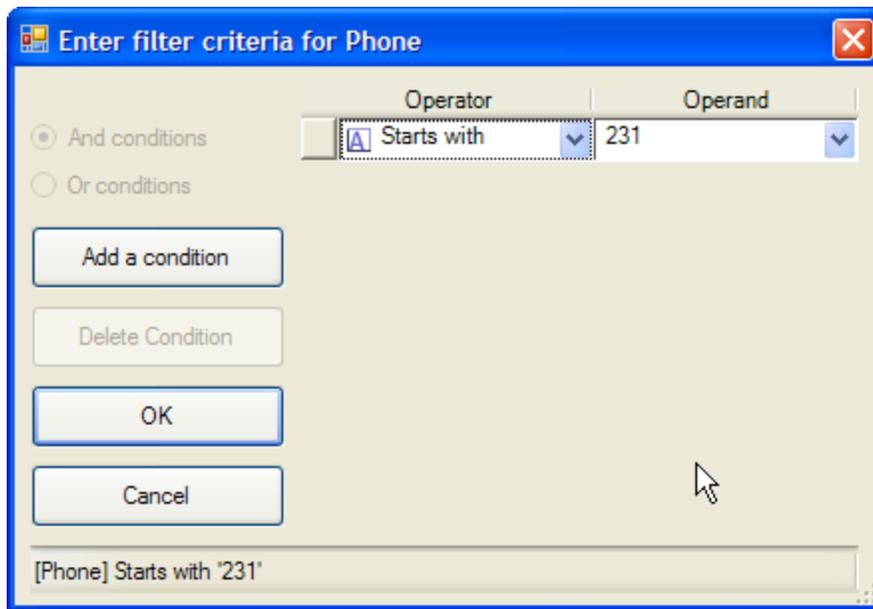
In the example shown above, we're adding a condition for the Phone number column of the User Status Grid. We only want to see users with phone numbers starting with 231. You may add as many conditions to a custom filter as you require. When you're ready to apply your custom filter, click the OK button.

As before, if you wish to remove a filter from a specific column, just click the filter icon and select (All) from the resulting drop-down box.

4.7.8   Mini View Mode

OfficeStatus Windows Client supports the display of user status board entries in Mini View mode.

This mode is designed to offer a more compact visual representation of user statuses. It can be used in combination with full screen mode.

When engaged, only user's names and status colors will be shown by default. You can customize the information shown in Mini View mode by selecting *Preferences | User Status Board | Column Chooser* from the main menu. Any column customizations made while in Mini View mode will be restored the next time this mode is entered.

Note: Tiles in mini view mode are always sorted by users' full names.

4.8   Unread Messages Panel

By default, the Unread Messages Panel resides in the lower (tabbed) portion of the OfficeStatus Windows Client user interface. It contains a summary listing of unread Messages that have bent sent to you from other OfficeStatus users.

Double-clicking on an entry within the Messages Panel will cause the Message Reader to appear with the corresponding message opened for your review.

You can hide the Unread Messages Panel (or show it again) by clicking the View menu and selecting Show Unread Messages Panel.

Note that when a new unread message arrives for you, a Notification appears on your Windows desktop (in close proximity to your tray notification area) alerting you to its presence. These notifications can easily be turned off if you so desire.

4.9   Status Watches Panel

By default, the Status Watches Panel resides in the lower (tabbed) portion of the OfficeStatus Windows Client user interface. It provides a summary listing of any Status Watches you current have in effect.

Double-clicking within the Status Watch panel will bring up a window that allows you to manage which users you are watching for status changes.

You can hide the Status Watches Panel (or show it again) by clicking the View menu and selecting Show Status Watches Panel.

4.10   Announcements Panel

OfficeStatus announcements are time-sensitive messages (e.g. they have a start date and optional end date) made visible to end users. Announcements are created by OfficeStatus system administrators.

Windows Client makes announcements visible via the Announcements Panel, which shows a listing of available announcements.

Double-click an announcement to view its contents in a pop-up window.

4.11   Status Types by Dept Panel

By default, the Status Types by Department panel resides in the lower (tabbed) portion of the OfficeStatus Windows Client user interface. It provides a high-level, proportional view of staff availability (in, out and unavailable) by department.

This status visualization tool shows the three core status types:

- **In** - Shown in green
- **Out** - Shown in red
- **Unavailable** - Shown in yellow

As described in this topic, all custom statuses defined within OfficeStatus are derived from these three core status types. For example, a custom status of "In Meeting" might have a status type of Unavailable, and would therefore show up in yellow in this visualization.

For each department defined within OfficeStatus, a separate stacked column is displayed. The individual section sizes of each column are relative to one another, and the heights of each of them are fixed in order to make maximum use of available space. To get the specific number of users "out" within a specific department, hover your mouse over that column section - a tool tip will appear which contains this information.

4.12 Statuses Panel

By default, the Statuses panel resides in the lower (tabbed) portion of the OfficeStatus Windows Client user interface. It provides a high-level, proportional view of staff availability by status.

Each of the bars shown in the statuses visualization uses the background color associated the related status.

4.13 Status Bar

The OfficeStatus Status Bar appears at the bottom of the user interface.

It provides you with summary information such as the communications status of OfficeStatus Windows Client, your login name and user status, the current date and time, and more.

5 My Status

5.1 Overview

A primary function of OfficeStatus is the communication of your availability to others within your organization.

To make OfficeStatus as effective as possible, each OfficeStatus Windows Client user needs to indicate when their availability changes. For example, when a user goes to lunch or leaves for an extended vacation, making a status change within OfficeStatus Windows Client will publish that information to other users.

Please see the My Status help topic for further details.

5.2 My Status

OfficeStatus Windows Client provides a **number of ways** to change your current status / availability.

Important: Whether or not you can change the status of *other users* depends upon your current security role membership.

User Status Change Window

Clicking the My Status button in the main OfficeStatus Windows Client toolbar will show the User Status Change window. Here, you'll see your current status and be able to select a new status.

If you'd like to specify when you expect to return from a status change, click the Specify Due Back Date / Time check-box and enter a date and/or time.

If you specify a due back date and time, then a return status may also be selected. When specified, the return status will be applied automatically when the due back date/time has elapsed.

You may also enter a comment about your change in status. Good examples of status comments include the name of someone who will handle your organizational duties while you are away or an indication of your telephone availability. Click the Comment Library hyperlink to access a set of standard, built-in comments (defined and managed by an OfficeStatus system administrator).

The User Status window toolbar also exposes a number of useful functions:

- Save and Cancel - Commits or cancels changes made, respectively.
- Reset - Resets all fields to their default values.
- One-Click Return - Flags you as "In", resets all other fields (such as due back, status comments) and then immediately saves the changes and closes the window.
- Out & Returning - Flags you as "Out" while setting a due back date/time in accordance with the drop-down menu option you select. The change is committed immediately and the window closes.

The **Recurrence** tab allows you specify that a scheduled status change should reoccur at periodic intervals. In order to use this feature, the status change must be scheduled and a due back date/time provided.

The user status window also contains a **Custom Fields** tab that allows you to specify values for custom status fields in use by your company. In some cases, OfficeStatus administrators may define custom status fields that are required. If such fields are left blank, you'll be prompted to populate them before saving.

Status Locks

The User Status Change window provides an optional "apply status lock" option that will prevent status changes that aren't initiated directly by users. For example, if a status is locked, external forces such as status events, calendar sync, etc. will not have any effect on your status. However, if a user (you or another user who has the required privileges to change your status) initiates a status change, it will be processed.

An example of when this feature might be useful is when you're leaving for a vacation. In such cases, you may wish to prevent calendar sync (for example) from updating your status.

Note: Your OfficeStatus system administrator has the option of preventing you from using this feature. In such cases, the option will be un-checked and disabled.

Changing Status Within the User Status Grid

OfficeStatus Windows Client also allows users to change their status via the User Status Grid. Simply double-click on your current status or right-click on your name and select User Status. Either of these actions will cause the User Status window (discussed above) to appear.

Note that depending up your security role membership, you may also be able to change the status of other OfficeStatus users.

Using the Tray Area Icon

When OfficeStatus Windows Client is running, it creates a small icon within the lower right of your Windows desktop (in the notification area).

Right-clicking the tray notification area icon will result in a pop-up menu (as shown above). Select My Status from the menu to access the User Status window (described above) or hover over the adjacent arrow to select a status shortcut.

5.3   Quick Status Changes

Sometimes you just don't have time to provide OfficeStatus Windows Client with details about your status changes (such as when you're due back, etc.). If, for example, you need to rush off to a last-minute meeting, you may want to communicate that you're *unavailable* - and leave it at that.

OfficeStatus Windows Client provides a facility for this, and they're called Quick Status Changes. When you use the Quick Status Change feature, you won't have the opportunity to specify a "due back" date / time or provide status comments (these details can always be specified by clicking on the My Status button).

There a few different ways to apply a quick status change:

- Right-click the OfficeStatus notification area icon and select Quick Status Change, as described in Changing My Status.
- Right-click your name within the User Status Grid and select Quick Status Change (shown above).
- Select Status | Quick Status Change in the main menu.

Taking any of the above actions will cause a pop-up list of available statuses to appear. Click an available status to apply it.

Important: It's possible that your OfficeStatus system administrator has disabled quick status change functions for your organization. In such cases, you won't see the menu options outlined above.

5.4   Multiple User Status Change

The Multiple User Status Change Window allows you to affect the status of multiple users at once.

Important: The ability to change the status of multiple users will not be available to users without the correct security role membership. Please contact your system administrator for details, if needed.

Selecting Users

You must first select the users whose status you would like to change. Click the Select Users button to make the User Selection window will appear, and choose which users you'd like to affect.

Note that you must have the necessary access rights required to change the status of each selected user. If you do not, a warning dialog will appear and any users for whom you lack proper access rights will be dropped from the selection. Ultimately, this matter is only of concern to Department Manager role members, who are limited to affecting users within their own department (Receptionist and Administrator role members can affect the status of any user).

Changing Status

After one or more users have been selected, select their new status from the drop-down box. You may also optionally set their due back, return status, and status comments.

Click Save to enact the status changes, otherwise click Cancel to abort.

6   Status Scheduling

6.1   Overview

Status Scheduling within OfficeStatus Windows Client allows users to specify that status changes should occur in the future.

The remainder of this help chapter discusses:

- Scheduling status changes
- Reviewing and/or editing scheduled status changes

6.2   Scheduling Status Changes

To schedule a future status change, check the Scheduled Status Change checkbox in the main User Status Change window and then specify the date and time the status change should occur.

In nearly every other sense, scheduled status changes are identity to "normal" status changes - the only difference is that they will be triggered by the system automatically at the date and time you specified in the step above.

6.3   User Status Calendar

The OfficeStatus User Status Calendar provides a high-level overview of scheduled (and optionally current) user statuses.

Toolbar Options

The User Status Calendar toolbar provides the following functions:

- **Refresh** - Refreshes the current calendar view.
- **Show Current Statuses** - By default, current statuses are displayed in addition to scheduled statuses. Toggling this button off will cause result in only scheduled status changes being shown.
- **Show Entries Without Due Back Date** - By default, statuses (scheduled or current) without due back dates/times are not shown. Toggle this button on to show them.
- **Location** - By default, the status of users in all locations are shown. Select a specific location from this drop-down box to constrain the display accordingly.
- **Department** - By default, the status of users in all departments are shown. Select a specific location from this drop-down box to constrain the display accordingly.

The Calendar View

A variety of calendar view styles (e.g. Day, Week, Month, etc.) are available for selection on the right of the calendar view.

You can also select the starting date for the current view using the controls to the left of the calendar view.

Hover your mouse over a specific user status entry to show a tooltip that provides additional details.

Clicking on a specific user status entry within the calendar view bring it up in the User Status editor window. Important: You will only be able to edit the status of users for whom you have sufficient permissions.

Creating New Scheduled Status Changes

Near the bottom of the User Status Calendar, you'll find controls that allow you to create new user status schedule entries.

To do so, select a user from the drop down box, specify a starting date/time, and click the Go button.

6.4 Review / Edit Scheduled Statuses

You may occasionally need to review, edit, or even delete status changes that you have scheduled to occur. In such cases, you can use the Status Schedule window within OfficeStatus Windows Client.

To access this window, select Status | My Status Schedule from the main menu. The Status Schedule window will appear.

You can use the toolbar to perform the following functions:

- **New Scheduled Status** - Use this function to create a new scheduled status entry.
- **Refresh** - Refresh the current status schedule listing.
- **Edit** - Edits the currently selected scheduled status change. You can also double-click an entry to edit it.
- **Delete** - Provides the ability to delete multiple scheduled status changes at once.

Double-click a scheduled status entry to edit it.

Important: If you're using the automatic calendar synchronization feature, any scheduled status changes created by that process will also appear in this list.

7   My Status Watches

7.1   Overview

Status Watches allow you to receive notifications when the status of another OfficeStatus user changes.

Status Watches improve the efficiency of your organization's staff by eliminating the need to repeatedly check the status of a colleague manually. Just create a status watch for the user and a pop-up notification will appear when appropriate.

A summary of the Status Watches you currently have defined will be shown in the Status Watches Panel of OfficeStatus Windows Client.

7.2   Watching Users

To manage your Status Watches, click the My Status Watches button in the main OfficeStatus Windows Client toolbar. The Status Watches window will appear.

The Status Watches window contains a listing of the users you are currently watching. Select one of these users to configure the status watch.

Note that for each user you are watching, the following options are available:

- o Notify when the user changes to "In"
- o Notify when the user changes to "Out"
- o Notify when the user changes to "Unavailable"
- o Ignore status changes resulting from the user being idle
- o Alert to status changes via popup window
- o Alert to status changes via email *
- o Alert to status changes via text message **

It's **important** to remember that, as described in the User Status Concepts section of this help file, all *specific* statuses defined within OfficeStatus (such as "Out to lunch") are actually derived from (or children of) the master statuses of In/Out/Unavailable. When you tell OfficeStatus Windows Client to notify you when a user's status changes to "Out", for example, it will automatically include any derived statuses (such as "On Vacation", etc.).

* Note: In order for the email alerting option to work correctly, you must specify a valid email address in your user contact information. Also, OfficeStatus Server must be correctly configured (by an administrator) to support email integration. If you experience problems getting status change email alerts to work, please contact your OfficeStatus system administrator.

** Note: In order for text messaging features to work correctly, you must specify a valid SMS Number and Provider in your user contact information. Also, OfficeStatus Server must be correctly configured (by an administrator) to support email integration. If you experience problems getting status change email alerts to work, please contact your OfficeStatus system administrator.

Selecting Users to Watch

To manage the list of users you're currently watching, click the Add / Remove Watched Users button.

Doing so will cause the User Selection window to appear, allowing you to choose the users whose status changes you wish to monitor.

8   Calendar Sync

8.1   OverView

OfficeStatus provides the ability to sync a user's status schedule with their Outlook calendar.

Two forms of calendar synchronization are available:

- Manual sync - Provides the ability to view upcoming calendar entries (appointments), and selectively sync your OfficeStatus status schedule with them.
- Auto sync - Offers the ability to automatically keep your status schedule in sync with your Outlook calendar.

Important: In order for calendar synchronization features to work, your OfficeStatus system administrator must first configure OfficeStatus Server for integration with Microsoft Exchange. Additionally, the email address present in your OfficeStatus contact information must match your Outlook email address.

8.2 Manual Calendar Sync

A user's status schedule can be manually synced with their Outlook calendar by accessing the Calendar Sync function in the main window Status menu.

The Calendar Sync window provides a listing of upcoming appointments in your Outlook calendar. By default, appointments that occur within the next 30 days will be shown. Use the start and end date inputs in the toolbar (and then click the Refresh button) to control the date range for which calendar entries appear.

Each Outlook calendar appointment will be represented by an entry in the list. The Sync column shows the current state of synchronization for each entry - a check mark indicates that the entry is synced with your status schedule, while an unchecked entry is not. For each entry that you wish to sync with your status schedule, check the box that appears in the Sync column. The toolbar also offers a Check button that makes it easier to check or uncheck all the entries in the list.

You can also change the Status and Return Status for entries in the list, as well as the status comments. Each of these attributes will be applied to the status schedule entry that results from the syncing process.

Click the Save toolbar button when you are done making changes, or simply close the Window to exit with committing any changes.

8.3 Automatic Calendar Sync

Automatic calendar synchronization allows OfficeStatus to keep your status schedule in sync with your Outlook calendar.

Since this feature is configured via the Auto Sync tab in the Preferences window, please see that help topic for details.

9 Company

9.1 Company Info

This Window show basic contact and policy information for your company.

These values are read-only, and defined by your OfficeStatus system administrator.

9.2 Announcements

The Announcements window allows you to view any available company announcements.

Double-click an announcement to view its full text in a separate window.

9.3 Managing Contact Info

To view or manage the contact information of another OfficeStatus user, double-click on the user's name. To manage your own contact information, navigate to Company | My Contact Info in the main window menu. The User Contact Information screen will appear.

Important: You will only be allowed to *change* another user's contact information if you have proper access rights, as discussed in this topic.

The User Contact Information window is segregated into the following tabs:

- **General** - Provides general contact information such as first and last name, email address, etc.
- **Phone** - Provides a listing of all phone numbers associated with this user. Right-click within the listing to edit or remove phone numbers.
- **Address** - Provides a listing of all addresses associated with this user. Right-click within the listing to edit or remove addresses.
- **Departments** - Shows departmental membership information for the user. Place check marks next to departments you wish to join.
- **Emergency** - Allows you to specify contact information and a brief plan in case of an emergency.

Note: The address and emergency tabs are visible only to admins, receptionists, and department managers.

Most of the fields on the general tab are self-explanatory, but a few of them merit additional discussion:

- **Email Address** - If you plan on using the Outlook calendar synchronization features of OfficeStatus, make sure this matches your Outlook email address.
- **SMS Number** - Used in conjunction with the SMS Provider field to allow the user to receive text messages through OfficeStatus. Please enter digits only.
- **SMS Provider** - Select the SMS provider associated with the user's mobile device.
- **Work Schedule** - The data entered into the work schedule fields will better allow OfficeStatus to assist you when entering dates and times during status changes.
- **Reports To** - Determines each user's placement in the company's Organizational Tree.

The General tab also provides the ability to view or edit the current user's image. Click the Change Image link to browse your computer for a replacement image file, or use the Remove Image link to remove the currently associated image. Supported user image formats include JPG, PNG, and GIF. There may also be a limit on the maximum image that can be assigned (as determined by current administrative settings).

The User Contact Information window also has a toolbar, which you can use to save any changes you've made, cancel changes, or create new phone and address records.

Note: Changes made within the User Contact Information window will not be committed until you click the Save Changes toolbar button.

9.4 Viewing User Images

If the User Contact Information screen shows an image of the selected user, you may click it to view the image in more detail.

This User Image screen can be re-sized as needed, and even Printed or Saved to your local computer.

9.5 Organizational Tree

OfficeStatus has the ability to produce an organizational tree based upon current user contact information.

Specifically, the organizational tree uses the "Reports To" user contact information field to create a hierarchical representation of user relationships.

You can use the buttons available in the toolbar to filter the organizational tree by location and / or department.

Note: User images are retrieved from OfficeStatus Server after the main structure of the organizational tree is created.

10 Messages

10.1 Overview

OfficeStatus Windows Client provides access to a simple and intuitive messaging system.

Occasionally, a receptionist or associate may receive a phone call on your behalf while you're out of the office. Within OfficeStatus Windows Client, they have the option of leaving you a quick "while you were away" style message.

When you receive a new OfficeStatus message, a new entry will appear in the Unread Notes Panel and a popup Notification appears on your Windows desktop (in close proximity to your tray notification area). These notifications can be turned off if you so desire.

Important: Depending upon how your OfficeStatus system administrator has configured the system, OfficeStatus notes may be deleted automatically after some period of time. Contact your system administrator for more details.

10.2 Reading Messages

To read OfficeStatus messages left for you, click the My Messages button in the main OfficeStatus toolbar. The Messages window will appear.

The Messages window functions very similarly to any modern email client. The window is comprised of top and bottom panes. The top window pane contains a listing of OfficeStatus messages, and the bottom pane displays the contents of the currently selected message.

The Shortcuts bar (docked to the left of the screen) provides one-click access to the following areas:

- **Inbox** - This is where your inbound messages reside.
- **Drafts** - Contains messages that you have drafted (e.g. composed and saved) but not yet sent. To access a draft message, switch to the Drafts view and then double-click on it.
- **Deleted** - Contains messages that you have recently deleted Note permanent message deletion will occur based upon how your system administrator has configured OfficeStatus.
- **Sent** - Shows messages that you have sent to other users.

The Messages window toolbar exposes the following functions, many of which are also available if you right-click on a specific note:

- **New** - Opens the Compose Message window.
- **Print** - Print the currently selected message.
- **Print Preview -** Preview how the selected message will appear when printed.
- **Delete** - Delete the currently selected message.
- **Reply -** Reply to the currently selected message.
- **Forward** - Forwards the currently selected message to another OfficeStatus user.
- **Refresh** - Refresh the message listing (top window pan el).
- **Help** - Brings up help relating to OfficeStatus message topics.

Important: Depending upon how your OfficeStatus system administrator has configured the system, OfficeStatus notes may be deleted automatically after some (usually extended) period of time. If you have important notes that require longer-term storage, you may wish to print them. Contact your OfficeStatus system administrator for details about your organization's OfficeStatus configuration.

10.3   Composing & Sending Messages

To compose and send a new OfficeStatus message, click the New toolbar button within the Messages window (or click Messages | Compose in the main window menu).

In order to send a message, you must specify one or more recipients. Click the To button in the top portion of the Messages window to select which OfficeStatus user(s) should receive your message.

Enter a Subject for your message as well as a message body. OfficeStatus Windows Client will, by default, automatically detect any misspelled words and mark them with a red squiggly underline. Words that have been identified as misspelled can be right-clicked to provide a listing of alternate spellings, or optionally ignored or added to your custom spelling dictionary.

Note: Spell checking during OfficeStatus message composition can be configured (or disabled entirely) through the Spell Checking tab of the User Preferences window.

When you're done editing your message, you can do one of the following:

- Click the Send button in the toolbar to send the message immediately
- Click the Save button in the toolbar to save this message as a draft without sending it (and optionally send it later
- Click the toolbar Close button to abandon the message without sending or saving it (you will be prompted for confirmation)

10.4   Sending Text Messages

OfficeStatus allows you to send short text messages to the mobile device of other users right from within OfficeStatus Windows Client.

In order for this feature to work, the recipient user(s) must have a valid SMS Number and SMS Provider configured within their user contact information.

To send a text message to a user, right-click them within the user status board and choose the Text Message option.

Alternatively, you can choose Messages | Text Message from the main window menu. In this case, you'll be presented a list of users that have SMS information available within their user contact information. Check the users that you would like to have receive the text message.

Regardless of how you choose the recipient(s), the Send Text Message window will appear. This window shows the text message recipients, and also allows you to enter a message body. The length of the message is limited to 160 characters (a standard SMS text message limit).

Click the Send button to send the text message, or Cancel to close the window without sending the message.

11 Resources

11.1 Overview

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

For more information about the attributes of resources, please see the Resource Details help topic.

11.2 Viewing Resources

To view a listing of current OfficeStatus resources, select Resources | View Resources from the main window menu. The Resources window will appear.

The resource listing shows the name, status, and type, and other information for each resource defined within OfficeStatus.

To view details for a specific resource, click it name in the list or right-click and select View Details from the resulting pop-up menu.

Toolbar Functions

The Resources window provides a number of useful features exposed as toolbar buttons:

- **New Resource** - Create a new resource.
- **Refresh** - Refresh the current resource listing.
- **Search** - Find specific entries within the resource listing. Resources can be found by name, the currently assigned user, or status comments.
- **Calendar** - Brings the user resource calendar into view.

- **Print** - Print the resource listing.
- **Print Preview** - Preview how the resource listing will appear when printed.
- **Columns** - Configure which columns are shown in the resource listing.
- **Export as Excel** - Export the contents of the resource listing to Microsoft Excel file format.
- **Export as PDF** - Export the contents of the resource listing to PDF file format.
- **Help** - Shows this help page.

The toolbar also exposes a number of drop-down filters, designed to help you limit the resource listing to entries with a specific location, resource type, status, or active state.

Searching Resources

Click the Search toolbar button to search available resources by a wide variety of fields, including name, description, and much more.

Customizing Columns

You can also decide which information is presented within the resource listing by customizing the columns that appear there.

To do so, click the Columns button in the toolbar. The Column Chooser window will appear, allowing you to check the columns you wish to have appear.

11.3 Resource Calendar

The OfficeStatus Resource Calendar provides a high-level overview of scheduled (and optionally current) resource statuses.

Toolbar Options

The Resource Calendar toolbar provides the following functions:

- **Refresh** - Refreshes the current calendar view.
- **Show Current Statuses** - By default, current statuses are displayed in addition to scheduled statuses. Toggling this button off will cause result in only scheduled status changes being shown.
- **Show Entries Without Due Back Date** - By default, statuses (scheduled or current) without due back dates/times are not shown. Toggle this button on to show them.
- **Location** - By default, the status of resources in all locations are shown. Select a specific location from this drop-down box to constrain the display accordingly.
- **Department** - By default, the status of resources in all departments are shown. Select a specific location from this drop-down box to constrain the display accordingly.

The Calendar View

A variety of calendar view styles (e.g. Day, Week, Month, etc.) are available for selection on the right of the calendar view.

You can also select the starting date for the current view using the controls to the left of the calendar view.

Hover your mouse over a specific resource status entry to show a tooltip that provides additional details.

Clicking on a specific entry within the calendar view bring it up in the Resource Status editor window.

Creating New Scheduled Status Changes

Near the bottom of the Resource Status Calendar, you'll find controls that allow you to create new resource status schedule entries.

To do so, select a resource from the drop down box, specify a starting date/time, and click the Go button.

11.4   Resource Details

To view the details of a resource within OfficeStatus, double-click it within the Resources window. The Resource Details window will appear.

The Resource Details window shows a wide range of information about the selected resource, including:

- A resource photo, if assigned
- Current resource status information
- Details about the resource such as its type, description, location, and much more
- A list of notes currently assigned to the resource
- The status history for the resource
- The status schedule for the resource

The Resource Details Toolbar

Use the following toolbar functions to affect changes to the resource:

- **Edit Resource** - This button will only be accessible to users with sufficient access rights, as described in the Resources Overview help topic.
- **Delete Resource** - This button will only be accessible to users with sufficient access rights, as described in the Resources Overview help topic.
- **Change Status** - Change the status of the resource. For example, you might indicate that the resource is unavailable and assign it to a specific individual.
- **Add Note** - Add an entry to the resource notes listing.
- **Schedule** - Create a status change that is scheduled to occur in the future.
- **Help** - Shows this help information.

Deleting Resources

Resources can only be deleted by users with sufficient access rights, as described in the Resources Overview help topic.

Important: Resource deletion cannot be undone, and will result in the permanent deletion of a resource's details, status history, notes, and scheduled status changes.

Viewing and Managing Notes

Resource notes are designed to provide additional, unstructured information about a resource. For example, a user may add a note providing instructions on how a particular resource is best used.

Any user can add, edit, or remove resource notes.

To add a note, use the Add Note toolbar button.

To read or edit a resource note, double-click it within the notes listing or right-click it and choose Edit Note from the resulting pop-up menu.

To remove a resource note, right-click it and choose Delete Note from the resulting pop-up menu.

Management of existing resource notes is limited to their creators, resource owners, status managers, and system admins.

Status History

A history of status changes is tracked for every OfficeStatus Resource.

Each entry in the status history listing indicates when the status change occurred, when it ended, to whom the resource was assigned, etc.

The resource history listing shown within the Resource Details window is read-only, and is limited to the last 15 days. For more data, users can generate a Resource Status History report.

Status Schedule

Future status changes for a resource are shown in the status schedule listing.

To create a new scheduled status change for a resource, use the Schedule toolbar button.

To view or edit an existing scheduled status change, double-click it or right-click it and choose Edit Scheduled Status Change from the resulting pop-up menu.

To remove an existing scheduled status change, right-click it and choose Delete Scheduled Status Change from the resulting pop-up menu.

Management of existing status schedule entries is limited to their creators, resource owners, status managers, and system admins.

11.5   Creating & Editing Resources

The Resource Editor window appears whenever a user creates a new resource or editing an existing one.

The window is organized as the follows:

Resource Information

Provides basic information about the resource such as its name, type, make and model, etc.

A resource can also be flagged as being active or not. Inactive resources will not appear by default in the Resources window, and becomes effective read-only in the system (e.g. users cannot change its status, add notes, etc.).

Scheduling for a resource can be disabled by setting the selecting "disallowed" from the Scheduling drop-down box. This will prevent users from using the "Schedule" function for this specific resource.

Access

Resources can be edited by their owners (and their managers) and by OfficeStatus system administrators.

If a Status Manager is assigned, only that user (as well as owners and OfficeStatus system administrators) will be able to change the status of that resource - otherwise, anyone can change the status of the resource.

Description

Used to describe the resource in more detail.

Resource Image

The default image for a resource may be determined by the resource type, and is configured by your OfficeStatus system administrator.

Use the Change Image hyperlink to set a specific image for the resource, or the Remove Image link to revert to the default image. Supported image file types are GIF, PNG, and JPG.

11.6 Changing Resource Status

Users can change the status of a resource by clicking the Change Status toolbar button in the Resource Details window.

The following status information can be specified:

- **Resource Status** - Select from a list of resource statuses created by your OfficeStatus system administrator.
- **Resource Assignment** - Select the name of user to whom this resource will be assigned.
- **Scheduling** - To schedule a resource status change to occur in the future, check the Schedule to Start check-box and enter a starting date and time.
- **Due Back** - You may optionally specify a Due Back date/time, as well as a Return Status. The return status will automatically be applied when the due back date/time elapses.
- **Recurrence** - Offers the ability to specify a recurring scheduled status change for this resource. Note that recurrence features are enabled only for scheduled status changes with a valid due back date/time.
- **Status Comments** - Additional information related to the status of the resource.

Note that the Assist drop-down buttons allow you to select from a range of computed date/time values such as "15 Mins from Now".

Click the Save button to commit any changes made, or the Cancel button to cancel them.

11.7 Scheduling Resources

Scheduling a resource status change is nearly identical to changing a resource's status.

If you check the "Schedule to Start" check-box of the Resource Status window, the resource status change will be scheduled to occur at the specified date and time.

A list of scheduled resource status changes appears in the Resource Details window. This list can also be used to edit or remove existing scheduled status changes.

12 Preferences

12.1 Overview

OfficeStatus Windows Client provides a highly customizable user experience so that you can adapt it to the way you work.

To manage your OfficeStatus Windows Client preferences, click the Preferences button in the main toolbar. The Application Settings window will appear.

Available option tabs:

- Startup
- General
- Status Events
- Status Changes
- Notifications
- Spell Checking
- Advanced

Note that some options may be available for you to change. Please see this help topic regarding disabled options.

12.2 Disabled Options

While working with your OfficeStatus Windows Client preferences, you may find that certain options are disabled (e.g. "grayed out" and unable to be changed).

In such cases, an OfficeStatus system administrator has elected to disallow end users the ability to change the option(s) in question. The value of the option will thereby reflect the current default setting applied by the system administrator (or it may have no value at all).

Please also note that certain settings, such as those relating to the automatic detection of user idle conditions (on the status events tab of the preferences window) are available only newer Windows operating systems (Windows 2000 and higher).

Please contact an OfficeStatus system administrator within your organization if you require additional information about these disabled options.

12.3 Startup

Select the General tab within the Application Settings window to manage general settings.

Location of OfficeStatus Web Service

This is the web service address (or URL) of the OfficeStatus server, managed by your organization's system administrator. Contact your system administrator for the precise value to enter here.

Authentication

Includes a "Remember password on this computer" checkbox that allows OfficeStatus Windows Client to remember the last password entered when it starts. When selected, the Username and Password fields will become enabled, as will the "Sign in automatically" checkbox.

You can also use the Change Password button to alter your OfficeStatus system password.

Important: Some (or all) of the authentication settings may be disabled based the configuration of your OfficeStatus user account. Contact your OfficeStatus system administrator for additional details.

Minimize OfficeStatus Windows Client After Logging In

Check this box to have OfficeStatus Windows Client minimized to the notification area of your Windows desktop upon startup.

Note that if OfficeStatus Windows Client must prompt for authentication credentials (see above), the sign in screen will appear *prior* to the window being minimized.

12.3.1 Change Password

Click the Change Password button in the General section of the OfficeStatus Application Settings window to make the Change Password window appear.
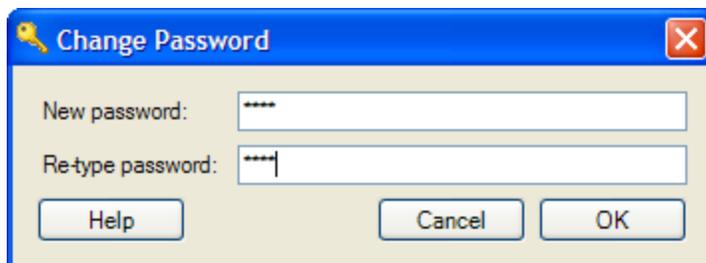
Enter a new password (and re-type it to confirm) and click OK to commit the change.

NOTE: The Change Password button (on the General tab of Application Settings) may not be enabled based upon the configuration of your user account. See your OfficeStatus system administrator for additional information.

12.4 General

The General preferences tab provides access to a variety of settings, most of them related to OfficeStatus Windows Client's user interface.

Initial department selection
Controls what department tab is selected by default when OfficeStatus Windows Client starts up.

Initial location selection
Controls what location is selected by default when OfficeStatus Windows Client starts up.

Visual theme
Allows for the selection of an OfficeStatus Windows Client theme. Each of the available themes alters the colors and style of the OfficeStatus Windows Client window components.

Minimize behavior
This setting determines what happens when OfficeStatus Windows Client is minimized. The following options are available:

- Windows System Tray - When the main window is minimized, the main window (and associated task bar button) are hidden, and only the system tray icon is visible.
- Windows Taskbar - Minimizes the main window to the Windows Taskbar.

Close behavior
This setting controls how OfficeStatus Windows Client behaves when you close the main application window (via the main window red X button, etc.). The following options are available:

- Minimize Windows Client (Recommended) - Leaves Windows Client running, and applies the minimize behavior discussed above.
- Shut Down - Exits Windows Client entirely (similar to using File | Shut Down).

Highlight my account in the user status grid
This switch controls whether or not your OfficeStatus user account will be highlighted (using a bold font) within the user status grid.

Global hotkey
Allows you to assign a global (system wide) hotkey for accessing Windows Client. When enabled, pressing the assigned global hotkeys on the keyboard (at the same time) will cause the OfficeStatus Windows Client to appear in the foreground.

OfficeStatus Windows Client must already be running in order for the global hotkey to function.

12.5 Status Events

Status Events allow OfficeStatus Windows Client to alter your status in reaction to specific environmental events. This allows for a higher degree of user status awareness on the part of OfficeStatus Windows Client, which translates into a more effective solution for your organization.

For each environmental event defined below, OfficeStatus can react by automatically changing your status. Or, you can simply elect to have OfficeStatus Windows Client do nothing when these events occur.

- **When OfficeStatus Windows Client starts up** - This event will be triggered whenever OfficeStatus Windows Client starts up.
- **When OfficeStatus Windows Client shuts down** - Triggered anytime OfficeStatus Windows Client shuts down. Note that this includes Windows operating system shutdown as well as workstation log-off.
- **When I lock my workstation** - Triggered only when you explicitly lock your workstation.
- **When I unlock my workstation** - Triggered when you explicitly unlock your workstation.
- **When I'm idle for N minutes*** - This event will be triggered when keyboard and mouse input is not detected for some period of time.

- **When I'm no longer idle*** - Triggered when you return from an idle state, as determined by the "when I'm idle" event above. Note that this event will not be triggered unless your current user status is the result of an idle event having occurred previously.
- **When my screen saver turns on** - Triggered when the Windows screen saver is activated (if one is enabled).
- **When my screen saver turns off** - Triggered when the Windows screen saver is de-activated (again, if one is enabled).

Tip: Use the Status Changes preferences tab to control how status events affect the "comments" and "due back" information associated with your current status.

12.6   Auto Sync

OfficeStatus has the ability to automatically sync your status schedule with your Outlook calendar.

Important: In order for calendar synchronization features to work, your OfficeStatus system administrator must first configure OfficeStatus Server for integration with Microsoft Exchange. Additionally, the email address present in your OfficeStatus contact information must match your Outlook email address.

To enable this feature, check the "Automatically sync status with Outlook calendar" check-box. You can also configure how far into the future this synchronization process will extend.

The remainder of the settings allow you to map between Outlook calendar statuses (such as "free", "busy", etc.) to OfficeStatus statuses. For each Outlook calendar status type, you can specify the resulting OfficeStatus status as well as an auto return status. The auto return status will be applied automatically when the Outlook calendar appointment ends.

12.7   Telephony Events

OfficeStatus Windows Client provides the ability to monitor a telephony device for call connect / disconnect events, and change your status accordingly.

Line to monitor
Choose the name of the telephony device you would like to monitor for call connect / disconnect events, or choose "None: monitoring disabled" to disable call monitoring entirely.

Important: Only supported telephony devices will be shown in this list. If you don't see the devices you expect here, please contact your OfficeStatus system administrator.

When an inbound call is connected
Choose the status you'd like to assume when an inbound telephone call is connected.

When an outbound call is connected
Choose the status you'd like to assume when an outbound telephone call is connected.

Return to previous status when calls are disconnected
Enable this feature if you'd like OfficeStatus Windows Client to revert to your previous status when calls are disconnected.

Important: Status will be reverted only if your current status has not changed since the call was connected.

Modify status comments to show caller ID, when available
Enable this feature if you'd like your user status comments updated to show the caller ID of the remote call party. Requires caller ID support in the selected telephony line/device. Note that this setting will override preferences defined in the Status Changes tab.

Troubleshooting

In order for OfficeStatus Windows Client telephony integration to function as designed, your workstation environment will need to configured appropriately. Please contact your OfficeStatus System administrator for assistance, if required.

12.8 Status Changes

These options allow you to control how existing status information is affected by status changes that *do not* have the opportunity to specify comments and due back data. Examples of such status changes include quick status changes and status events.

- **Clear existing status comments** - By default, status events will clear your current status comments only when settings your status to "In". You can change this behavior here so that status comments are never cleared, always cleared, etc.
- **Clear existing "due back" data** - Like above, only applies to any "due back" date and time information that may have been entered during an explicit status change.
- **Do not clear status comments or due back data before user is due back** - When this switch is engaged, it ensures that status event processing will never clear existing status comments or due back data *prior to* the user's current due back date and time (if applicable).
  - ○ **Unless the change is user initiated** - When enabled, the above rule will be ignored when the status change is not triggered by a status event.

12.9 Notifications

By default, OfficeStatus Windows Client brings the following events to your attention:

- The availability of new, unread OfficeStatus Notes
- Change in status of an OfficeStatus user that you're watching

Notification of these events can be customized via the Notifications tab of the Application Settings window. Notifications can trigger a pop-up window and/or play a sound.

Notification Sounds
To play a sound when an OfficeStatus Notification is triggered (by one of the events described above), check the *Play a sound* checkbox and click the Browse button to locate a Windows sound file. Any sound file with a .wav extension can be used.

Important: Notification sound wave files must be PCM (uncompressed) format. Please use the test button (represented by a small speaker icon) to text your sound file selections.

Popup Windows
Notification popup windows appear in the lower right corner of your Windows desktop and provide additional information about the triggering event. Use the check boxes on the Notifications tab to enable or disable popup windows for the events described above.

*Popup windows appear in the notification area of the
Windows Taskbar*

Also note that you can determine specifically how long a popup window should remain on screen. If you enter a 0 (zero) into this field, notification popup windows will stay on-screen until you close them explicitly.

12.10 Spell Checking

OfficeStatus Windows Client integrates spell checking capabilities into several functional areas (such as note composition, entry of status comments, etc.).

Spell checking features operate in a manner very similar to a modern word processor, with the following options available:

- **Dictionary** - Allows selection from among the various available dictionaries.
- **Check spelling as you type** - Applies to the Note composition window only. Highlights potentially misspelled words with a red underlying as you type 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.

Use these options to customize the spell checking features according to your preferences.

12.11 Advanced

OfficeStatus Windows Client provides access to a number of advanced options that impact application areas such as back-end system communications, data refresh rates, and more. Generally, you will not need to modify these settings unless instructed to do so by an OfficeStatus system administrator.

Refresh Rates

OfficeStatus Windows Client quietly communicates with a back-end service within your organization to periodically refresh its internal data, determine user status changes, and more.

To alter data refresh timing, click the Refresh tab on the OfficeStatus Windows Client Application Settings window. The following options are available:

- **Refresh user status grid every N seconds** - Determines how often OfficeStatus Windows Client will poll for updated user status information. Default is 15 seconds.

- **Refresh unread notes list every N seconds** - Determines how often OfficeStatus Windows Client will poll for new, unread notes. Default is 15 seconds.
- **Refresh semi-static data cache every N minutes** - Determines how often OfficeStatus Windows Client will refresh internal data that changes infrequently (such as department listings, custom status definitions, etc.). Default is 15 minutes.

13   Reports

13.1   Overview

OfficeStatus Windows Client provides the following built-in reports:

- Phone List - summary of telephone contact information for OfficeStatus users.
- User Status History - status history details per OfficeStatus user.

Both reports are accessible via the Reports menu item in the main OfficeStatus Windows Client menu.

The information accessible via the built-in OfficeStatus Windows Client Reports depends upon the security role of the logged in OfficeStatus user. See Report Security for additional details.

13.2   Report Security

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

Employee, Departmental, and Location Reports

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

User Status History and User Status Schedule Reports

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

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

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

13.3   Printing / Exporting Reports

All OfficeStatus Windows Client built-in reports support robust printing capability, and can also be exported to PDF, RTF, and TIFF file formats.

Other common functions of the OfficeStatus Windows Client reporting window include:

- Paging (navigating from one report page to another)
- Report zooming and sizing control
- Printer page setup
- Hide / show parameters area

To export the contents of an OfficeStatus report, simply click the Export toolbar button and choose a destination path for the resulting MS Excel file.

13.4 Report Types

13.4.1 Employees

The Employee Report shows a complete listing OfficeStatus users, along with telephone number, email address, and location information.

OfficeStatus users may have more than one telephone number associated with their user profile. For each OfficeStatus user that has telephone contact information defined within the system, one or more telephone number entries will appear beneath their name. This report also allows the viewer to toggle off / on the display of phone number records.

By default, the Employee Report screen includes OfficeStatus users from all locations. Select a location from the drop-down box in the reporting window toolbar to narrow the report contents to that specific location.

All built-in OfficeStatus Windows Client reports can also be printed / exported.

13.4.2 Departments

The Departmental Report provides a break-down of users contained within each OfficeStatus department.

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

All built-in OfficeStatus Windows Client reports can also be printed / exported.

13.4.3 Locations

The Location Report provides a listing of users contained within each OfficeStatus location.

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

All built-in OfficeStatus Windows Client reports can also be printed / exported.

13.4.4 Emergency Plan

The Emergency Plan report shows emergency contact and plan information for each OfficeStatus user.

For each user within the selected location(s), this report displays their name, location, job title, emergency contact name, emergency contact phone number, and emergency plan.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.5 User Arrival Times

The User Arrival Times report shows the arrival time of a user for each day within the selected time span.

Important: Arrival times reflect the time of the first status change of type "in" for a given user, on a given day. This data can be corroborated via the User Status History report.

The availability of OfficeStatus users available for reporting is dictated by reporting security rules. By default, normal users will only be able to report upon themselves.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.6 User Time Card

The User Time Card report shows a daily breakdown of the number of hours one or more users spent in the selected status(es).

The availability of OfficeStatus users available for reporting is dictated by reporting security rules. By default, normal users will only be able to report upon themselves.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.7 User Time in Status

The User Time in Status report shows a breakdown of how much time the selected user(s) have spent in each status.

Note that only relevant entries will be shown in this report. For example, if a user has no status entries for the selected time period, they will not be shown.

The availability of OfficeStatus users available for reporting is dictated by reporting security rules. By default, normal users will only be able to report upon themselves.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.8 User Status History

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

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

The availability of OfficeStatus users available for reporting is dictated by reporting security rules. By default, normal users will only be able to report upon themselves.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.9 User Status Schedule

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

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

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

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

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.10 User Status Watch

The User Status Watch report allows users to determine which users are watching them for status changes.

The report shows the names of the user's what are watching the selected user for status changes, along with an indication of which status types are being observed and the notification options in use.

The availability of OfficeStatus users available for reporting is dictated by reporting security rules. By default, normal users will only be able to report upon themselves.

All built-in OfficeStatus Windows Client reports can be printed / exported.

13.4.11 Status Summary

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

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

13.4.12 Resource Status History

The Resource Status History report provides a history of status changes for a given OfficeStatus resource, along with a summary of hours spent in each of the three core resource status types - "Available", "Out of Service", and "In Use".

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

Note that you must select one or more resources (from the Resources drop-down list) and click the Run Report button to initiate report generation.

All built-in OfficeStatus Windows Client reports can be printed / exported.

14   Final Items

14.1   Selecting Users

A number of OfficeStatus Windows Client features (including status watches and note composition) utilize the User Selection window to select one or more OfficeStatus users.

This window presents a list of OfficeStatus users with check boxes next to their full names. Check the box next to each user you wish to select.

The user listing can be filtered by Department, First Name, or Last Name (or any combination of these fields).

14.2   Signing Out

If you would like to sign out of OfficeStatus Windows Client without shutting it down, select the File | Sign Out menu option.

Signing out will close your current client session and begin a new one.

14.3   Shutting Down

You can shut down OfficeStatus Windows Client in one of two ways. First, you can use the File | Shutdown menu option. Alternatively, you can right-click on the OfficeStatus Windows Client icon in the notification tray area of your Windows start bar and select Shut Down from the menu that appears.

In either case, changes to the running status of OfficeStatus Windows Client may result in changes to your status. Such changes are managed in the Status Events section of the Preferences dialog.