EIOBoard Integration with Outlook and Exchange

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Overview

This document will cover how EIOBoard integrates with Microsoft Outlook and Microsoft Exchange. Customer-Hosted customers can integrate with their Exchange server so that it synchronizes calendar events with the EIOBoard server, allowing users' statuses to change automatically based on the events in Exchange. Both EIOBoard-Hosted customer and Customer-Hosted customers also have the option to synchronize with their local Outlook calendars (regardless of whether or not an Exchange server is used). This client-side synchronization is available to any user who uses the EIOBoard stand-alone application or the EIOBoard Outlook Add-In.

Exchange Calendar Sync

EIOBoard allows you to synchronize Exchange events with EIOBoard using EWS (Exchange Web Service). This means that future statuses will be automatically created for EIOBoard users so that their statuses will be changed automatically. For example, let's say you have a meeting next Wednesday from 2:00PM to 4:00PM, and you have created an event for this in Exchange. EIOBoard's Exchange Sync feature will import this event into EIOBoard so that your status will change to "Meeting" automatically at 2:00PM. You will also have the option to change your status back to "In" (or even your previous status) at 4:00PM. This configuration will be discussed in the following sections.

Please note that Exchange Calendar Sync is only available for Customer-Hosted customers because it requires communication between the EIOBoard server and Exchange Server. Also, the Exchange Server must be running Exchange 2007 or later. Client-side synchronization is available for all customers and is discussed in the Outlook Calendar Sync section.

2.1   Connect to Exchange

In the EIOBoard Server, go to **Management** > **Settings**. The **Exchange Sync.** tab of the server settings allows you to configure connection settings for synchronizing EIOBoard with your Microsoft Exchange email server. An example of this window can be seen below.
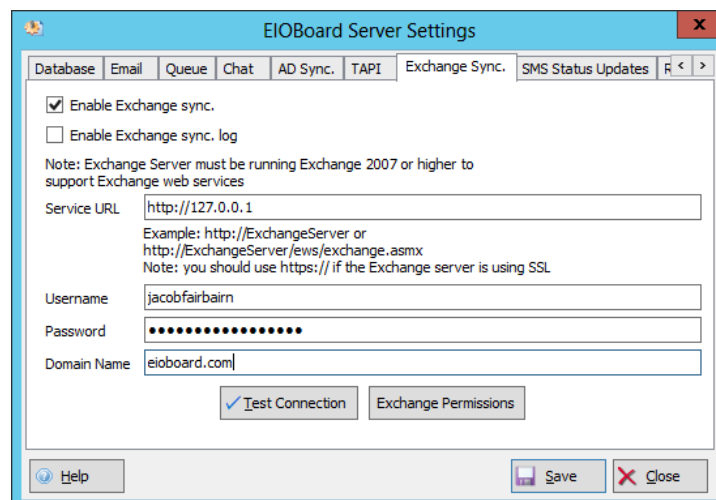
In order to connect to Exchange, you will first have to check **Enable Exchange Sync**. Then you will be able to input the rest of the required information so that EIOBoard can connect to Exchange: Service URL, Domain Name, Username, and Password. You must use a username that has access to all other Exchange mailboxes in order for EIOBoard to access these user's events. By clicking **Test Connection**, you can confirm that EIOBoard can connect to Exchange with the supplied information.

For details on how to configure Exchange Permissions, please Click Here.

2.2 Exchange Sync Configuration

The **Exchange Sync** tab of the main EIOBoard Server window allows you to configure how events are imported from Exchange. Multiple templates can be saved and configured here (one per organization). So if multiple organizations are being used in EIOBoard, each organization can have different Exchange Sync settings.

To create a template for an organization, simply select the organization (at the top), configure the settings specific to this organization, select each user to sync with (on the right), and click **Save Template**. This template will now be run based on the user-defined Schedule, or the user can click **Start Manual Sync** to sync these users' calendars manually. If you do a manual sync, you can view the status of each users' synchronization by going to the **Manual Sync Log** tab.
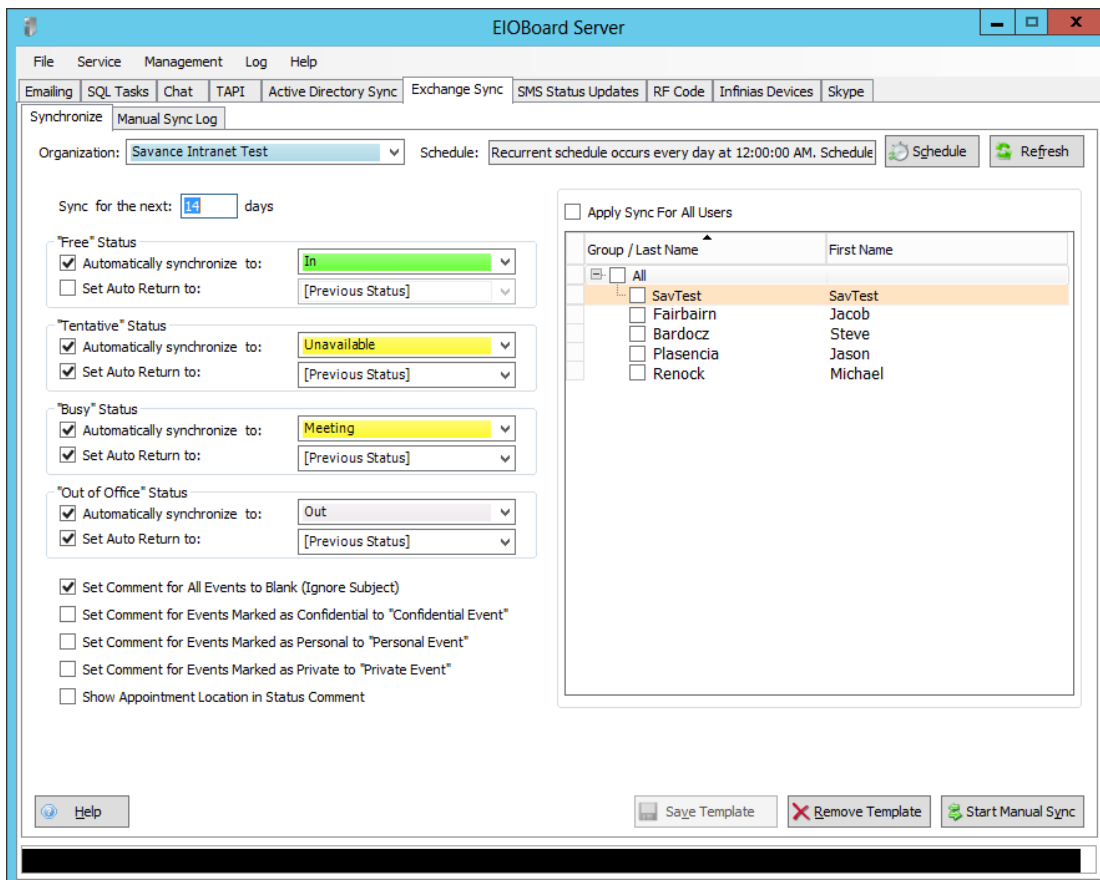
There are 4 different event types in Outlook ("Free", "Tentative", "Busy", and "Out of Office"). Each event type can be linked to any EIOBoard status so that each event will change a user's status. For example, as seen above, the "Busy" Outlook status is mapped to the "Meeting" EIOBoard status. So whenever the user adds an Outlook event of type "Busy", the event will also be added to the user's EIOBoard account with the Meeting status. When the event is over, it will return to "[Previous Status]", meaning that the user's status will change back to the last status once the Meeting is over.

Below is a list of all other options in this window:

- **Set Comment for All Events to Blank (Ignore Subject)**: Regardless of the details a user gives to an event, the EIOBoard comment will show up blank
- **Set Comment for Events Marked as Confidential to "Confidential Event"**: Events marked as "Confidential" in Outlook will not show the comment in EIOBoard ("Confidential Event" will be shown instead)
- **Set Comment for Events Marked as Personal to "Personal Event"**: Events marked as "Personal" in Outlook will not show the comment in EIOBoard ("Personal Event" will be shown instead)
- **Set Comment for Events Marked as Private to "Private Event"**: Events marked as "Private" in Outlook will not show the comment in EIOBoard ("Private Event" will be shown instead)
- **Show Appointment Location in Status Comment**: If an Appointment Location is specified in the Outlook Event, this location will also be appended to the end of the EIOBoard comment

Once all the events are synced from Exchange to EIOBoard, no user interaction is required. Each users' statuses will be automatically updated based on their Exchange events, even if they are not at their computer!

Outlook Calendar Sync

If your organization does not have an Exchange server or if you are EIOBoard-Hosted, users can still sync their local Microsoft Outlook events to EIOBoard. In the EIOBoard application or add-in, simply open up the **Settings** and follow the instructions in the following sections. Then you Outlook events will change your EIOBoard status automatically, just as described for Exchange sync.

3.1   Synchronization Settings

The **Calendar Sync** tab allows the user to configure how events get synchronized from Outlook. For example, if you create an event in Outlook each time you have a meeting, it would be a hassle to enter that into EIOBoard as well. This synchronization makes it so that you only have to enter it in Outlook, and then EIOBoard will automatically update your status at the time of the meeting using a Future Status.

By checking **Add EIOBoard Future Status to Outlook**, you can also sync EIOBoard events to Outlook. So if you add an event inside of EIOBoard through the Calendar feature (found in the main toolbar), then these events will also be automatically added to Outlook.

NOTE: Synchronization can be done Manually (from the Synchronize button of the toolbar) or Automatically (configured in the Auto Sync settings). If you would like to sync events manually, you have the option to check **Prompt for Synchronization on Startup** so that you will be asked to sync all events when EIOBoard starts up.
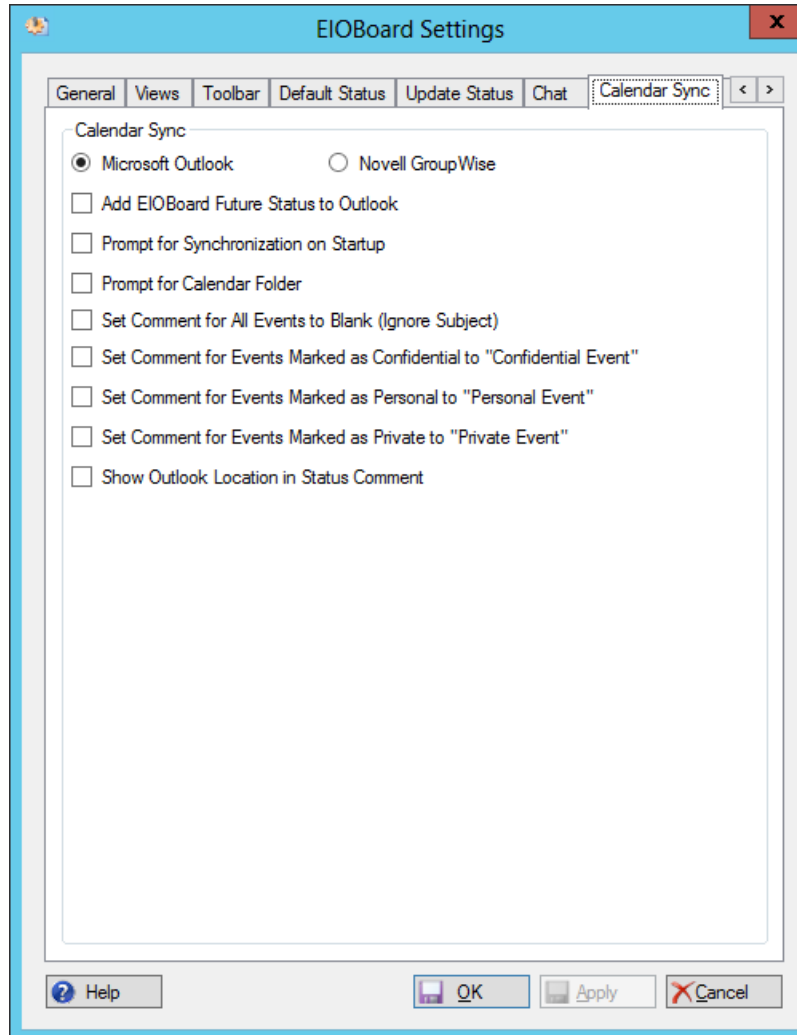
Below is a list of all other options in this window. These exact options were already listed in the Exchange Sync section, but they are listed here as well for convenience:

- **Set Comment for All Events to Blank (Ignore Subject)**: Regardless of the details a user gives to an event, the EIOBoard comment will show up blank
- **Set Comment for Events Marked as Confidential to "Confidential Event"**: Events marked as "Confidential" in Outlook will not show the comment in EIOBoard ("Confidential Event" will be shown instead)
- **Set Comment for Events Marked as Personal to "Personal Event"**: Events marked as "Personal" in Outlook will not show the comment in EIOBoard ("Personal Event" will be shown instead)
- **Set Comment for Events Marked as Private to "Private Event"**: Events marked as "Private" in Outlook will not show the comment in EIOBoard ("Private Event" will be shown instead)
- **Show Outlook Location in Status Comment**: If an Appointment Location is specified in the Outlook Event, this location will also be appended to the end of the EIOBoard comment

Once all the events are synced from Outlook to EIOBoard, no more user interaction is required. Your status will be automatically updated based on your Outlook events, even if you are not at their computer!

3.2   Auto Sync

The **Auto Sync** tab allows the user to configure when the Calendar Sync will occur and what statuses will be mapped. For example, you may want all "Tentative" events in Outlook to change your status to "Meeting" in EIOBoard. In this case, you would go to the **"Tentative" Status** section, check the **Automatically synchronize to** box, and change the status to *Meeting*. If you want to change your status back once the meeting is over, check the **Set Auto Return to** box and select a status. "[Previous Status]" means that your status will return to whatever status it was before the event started. An example of this can be seen below.
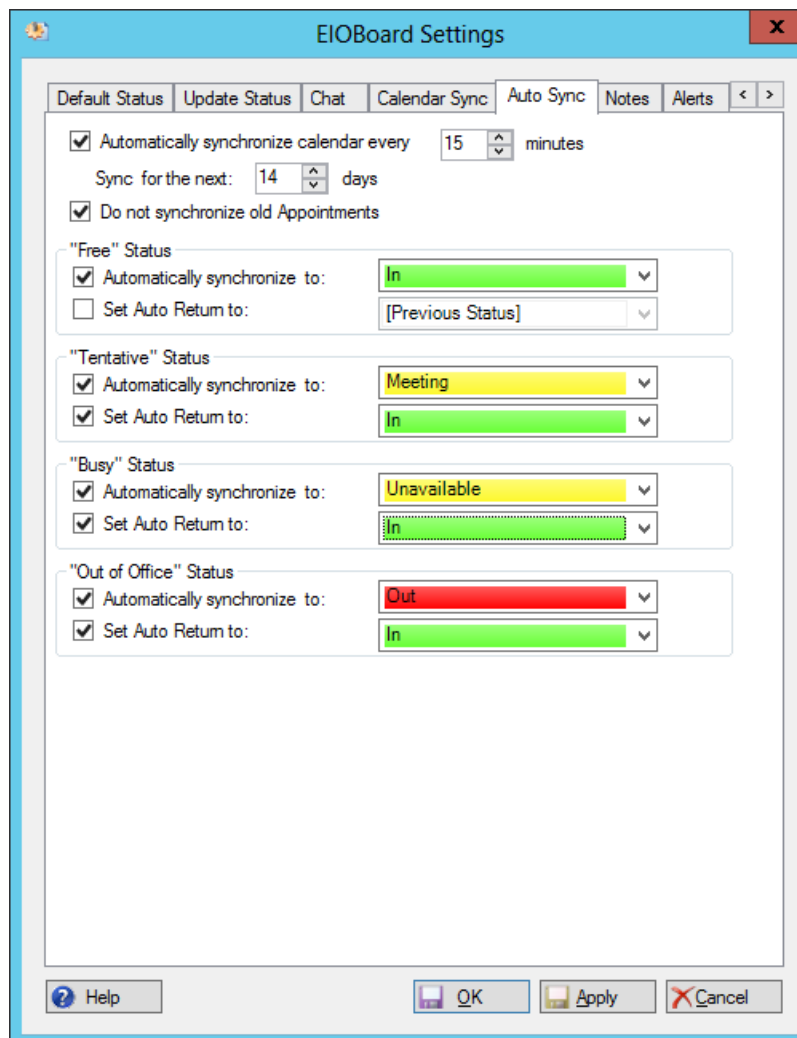
This window allows you to configure a couple different things for automatic synchronization. You can configure how often (in minutes) events are synchronized at the top. **Sync for the next X**

days means that EIOBoard will only sync events that occur within the given number of days. So an event three months from now will not be added to the calendar if it is only syncing over the next 14 days. And finally, you can check **Do not Synchronize Old Appointments** if you do not want to synchronize your events before today (recommended).

There are 4 different event types in Outlook ("Free", "Tentative", "Busy", and "Out of Office"). Each event type can be linked to any EIOBoard status so that each event will change a user's status. For example, as seen above, the "Busy" Outlook status is mapped to the "Unavailable" EIOBoard status. So whenever the user adds an Outlook event of type "Busy", the event will also be added to the user's EIOBoard account with the Unavailable status. When the event is over, it will return to "[Previous Status]", meaning that the user's status will change back to the last status once the Meeting is over.

3.3   Manual Sync

If you would like to manually sync your EIOBoard events with Outlook, you can do so by going to **Synchronize** > **Calendar** from the EIOBoard toolbar. The **Calendar** tab displays the Outlook events that will be synchronized with the EIOBoard Future Statuses. Click the **Sync** check box next to the events you wish to add to your EIOBoard Calendar. Then you can configure what status each event will change to in the **In/Out Status** column.

When you are ready, click **OK** at the bottom of the window. This will now add your Outlook events as EIOBoard Future Status Events.
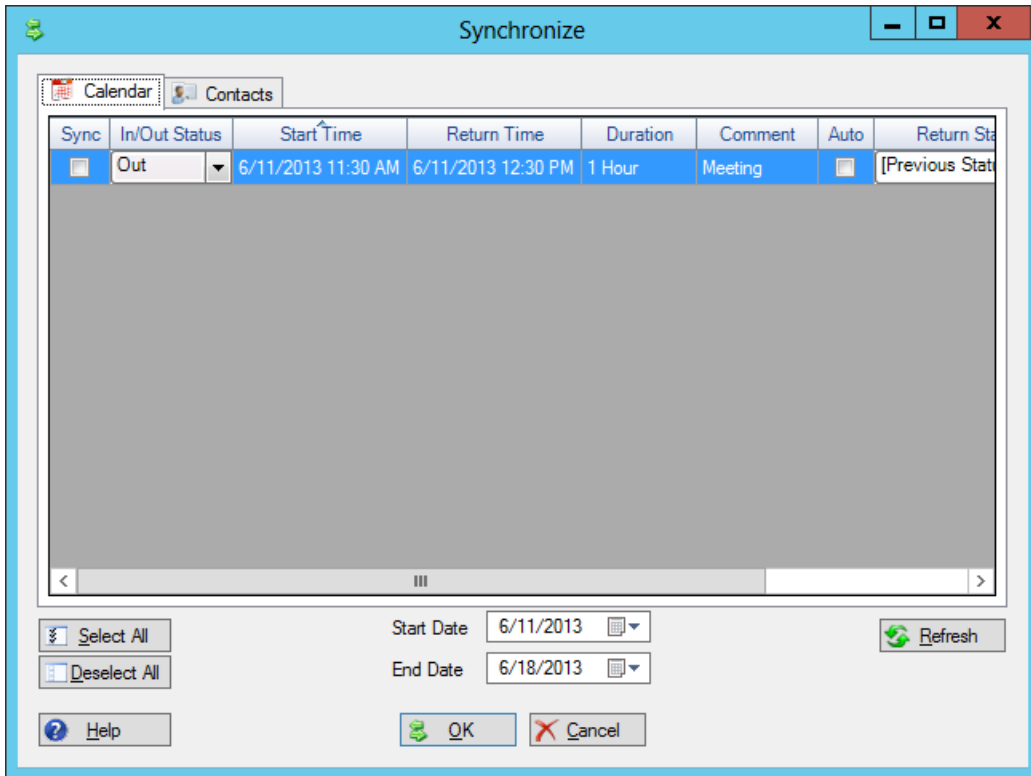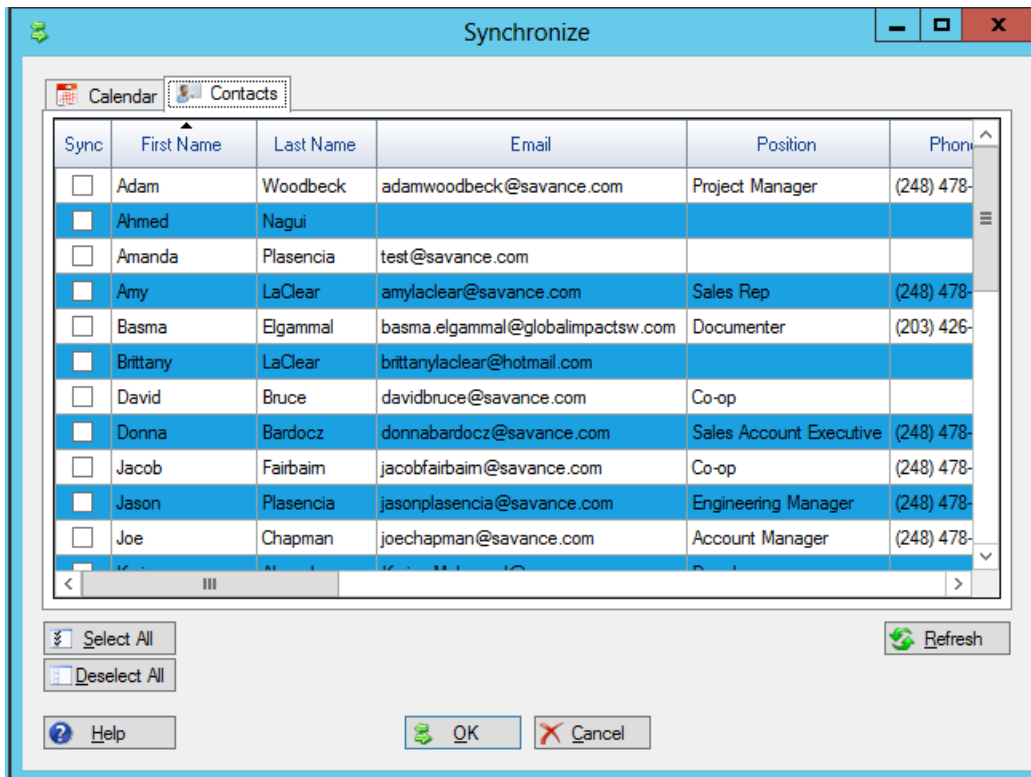
Outlook Contact Sync

If you would like to manually sync your EIOBoard contact information with Outlook, you can do so by going to **Synchronize** > **Contacts** from the EIOBoard toolbar. This will automatically create Outlook contacts (or update existing contacts) based on the information provided in EIOBoard: the user's name, email address, phone number, title, etc.

The **Contacts** tab displays the EIOBoard Contacts information screen for all users. This allows you to check each user that you want to add into your Outlook contacts. Simply check each user you would like to sync to Outlook and then click **OK** at the bottom.

You can also synchronize for a Single Contact by right-clicking a user and selecting **Contact Sync**. An example of this can be seen below.
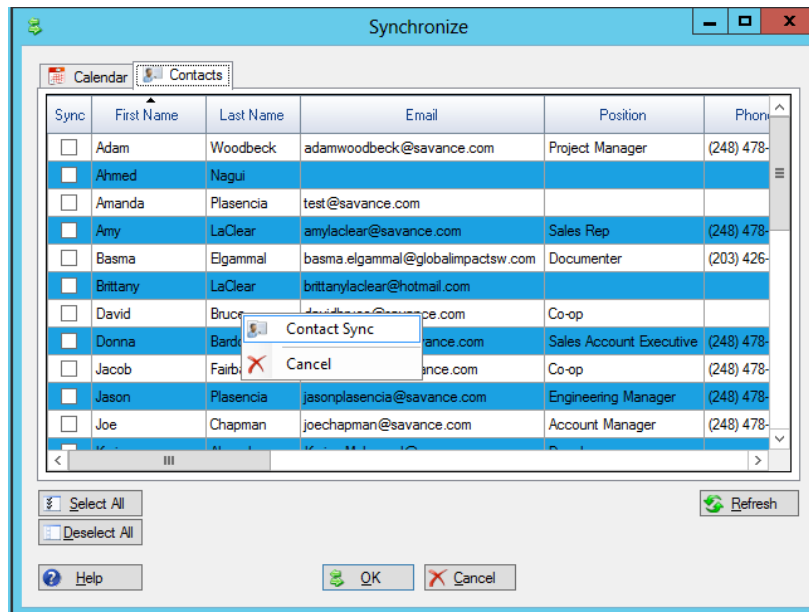
When you are syncing a single user, the **Synchronize Contact Information** screen will come up and Synchronize for this one contact. You can check or uncheck which information you would like to be included, if necessary.

Note: If the EIOBoard Contact is not synchronized with the Outlook Contact already, it will try to match with the Email of an existing user first, then with the Last Name and First Name. Otherwise, it will create a new contact.
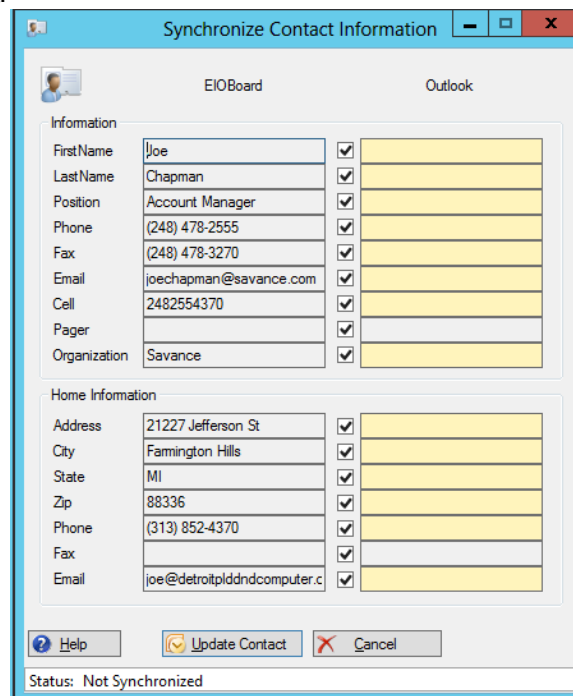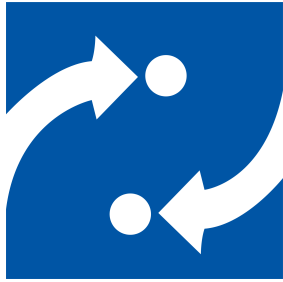
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