EIOBoard Mobile Help Guide

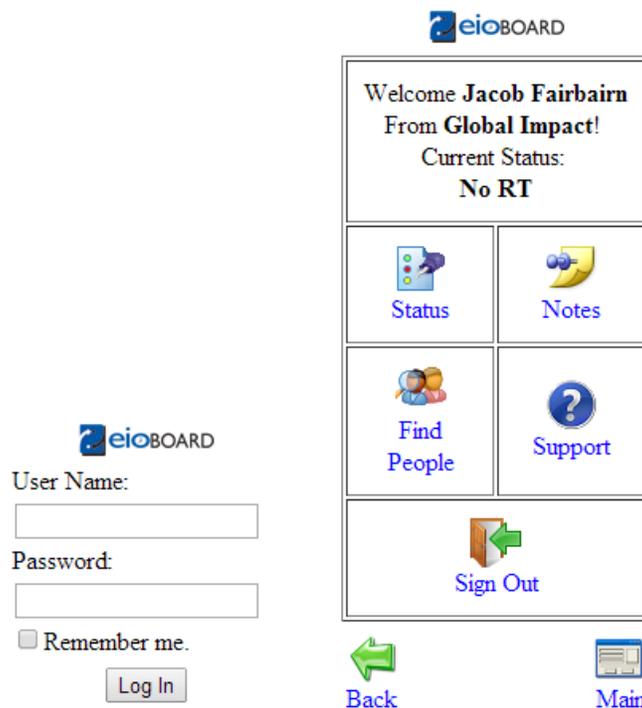# Table of Contents

Overview

This document will cover how to use EIOBoard's Mobile Interface. If you are an EIOBoard-Hosted customer, you can access the web interface by going to eioboard.com from any mobile device. You can also test it out from a PC by going to eioboard.com/mobile .

If you are Customer-Hosted, no additional changes need to be made to EIOBoard. However, if you have not done so already, you will need to configure your EIOBoard server for access outside the network. Instructions on how to do so can be found in the link below. Then users can access the mobile interface from a mobile device by going to the server name that is set up on the server. How to Configure EIOBoard Access Remotely

Logging In

When you first go to the Mobile interface, you will be greeted with the log in page. Simply type in your EIOBoard username and password to log in. If you would like to be automatically logged in next time you access EIOBoard, simply check **Remember Me** before logging in.

Once you log in, you will be brought to the Welcome screen, as seen below. You may click **Sign Out** to log out at any time, or you can click any of the other buttons to use the mobile interface. Each section will be described in the following pages.

Status

There are two different ways to update your status. You can use the **All-In-One**, which allows you to specify all options on a single page; you can also use the **Status Wizard** where you specify each option in a step-by-step process.

The **All-In-One** is the simpler method to use. It allows you to specify your Status, Return Time, Location, Comment, etc. all at once. You may apply a filter (if it applies) at the bottom of the screen to filter out unused statuses, locations, etc. When you are done, simply click **Update** at the top or at the bottom to update your status.

The **Status Wizard** allows you to go select each of these options one at a time. You will be first asked which filter you would like to apply, if any. You will then be asked for your Return Time, Location, Customer, and Comment. Once you are done adding a comment, click **OK** to update your status.
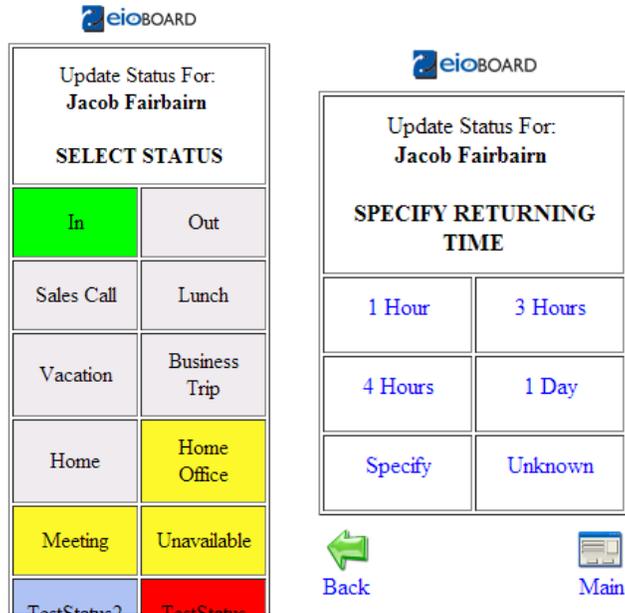
NOTE: The Location and Customer fields will only show if they are enabled from the EIOBoard Application. An Administrator can enable or disable these fields by going to **Administrator** > **Company Settings** in the EIOBoard application.

Notes

The **Notes** section allows you to view all the notes you have received as well as respond to those notes. Notes can be sent and received in the mobile interface, the iPhone app, and the PC app. It is a great way for employees to communicate on the job and on the go!

Unread notes will show up in grey, as seen in the picture above. You can click on any note to view the full message or to respond to it. You can also click on any user's name in order to view their contact details. You can also send users a note through Find People. Below is an example of a note once the full message is viewed.

You can click **Delete** to remove this note from the list, and you can click **Reply** to send a note back to this user. Replying will bring up the screen seen below, allowing you to send the given user a new note. You also have the option to notify the user via Email or Text Message by checking one of the boxes at the bottom. By checking Private, you can also make the note private so that only the other user can view the note; otherwise, it is public and all users can view your note.

Find People

The **Find People** section allows you to search for users to view their statuses and other contact information. You will first be asked how you want to find other users:

- **Search**: This allows you to search for users by name or extension. For example, typing in "Mi" might display users named "Michael" or "Sami".
- **By Group**: This allows you to view all users in any EIOBoard group. You may also select the All group to view all users at once. It will also ask you if you would like to apply a filter (if used by your organization) so that you can filter out unused groups.
- **My Friends**: The My Friends group can be customized from the EIOBoard Application. This customizable group can be viewed when searching users in the mobile interface and allows you to easily filter through users to only view those you need to see.

Once you have chosen your search criteria, a list of all users that match the given criteria will show up. Each user's name will appear with the color of their status's color. You can also view each user's phone extension and status.

You can click on a user's name to view their contact information. You can also click on the **Note** icon to send this user a Note.

Support

The **Support** section allows you to get help in EIOBoard by reviewing EIOBoard's knowledgebase, by contacting EIOBoard's support team, etc. You will first be asked how you would like to get support. The following options are available for you.
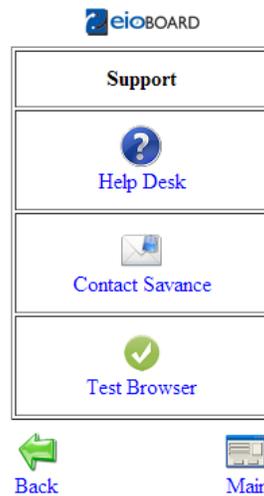
Help Desk
This allows you to send a message to EIOBoard's support team. You can type in a message in the message box, and then you can specify what type of message you would like to send: is it a complaint? a question? a comment?
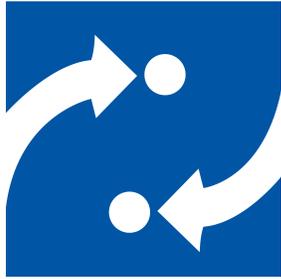
Contact Savance
This gives you information on other ways to contact Savance. It will provide you with Savance's office address, email address, telephone number, and fax number.

Test Browser
This section is for advanced users. It gives you basic information on your current browser, which can be used for troubleshooting purposes if you run into issues in the Mobile interface. It also lets you know if cookies, Javascript, etc are successful.

Thank you for choosing Savance!