SAVANCE
EIOBOARD

EIOBoard iPhone App Help Guide

Savance

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Overview

This document will show you how to set up and use EIOBoard's iPhone/iPad application. EIOBoard's iPhone and iPad App is designed to allow access to quick status updates, contact info, notes, text messaging, and each co-worker's current status and anticipated return time. EIOBoard's application is compatible with iPhone, iPod touch, and iPad. Requires iOS 5.0 or later.

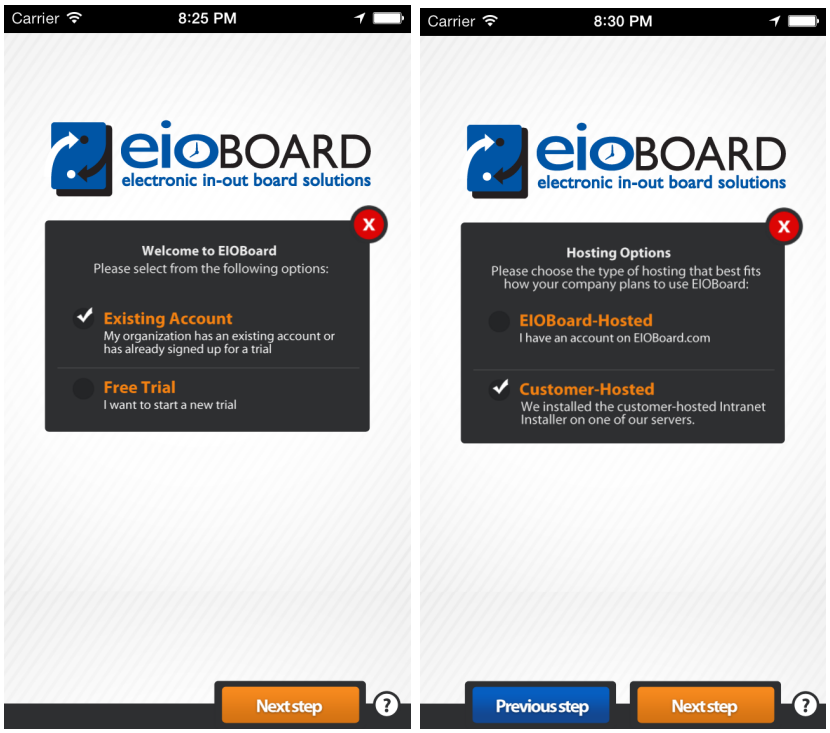
EIOBoard Internet Users - It's ready to go! Download the app on your iPhone and iPad and point to http://www.eioboard.com after the installation.

EIOBoard Intranet Users - Requires EIOBoard 9.0.x or higher. Configure your EIOBoard server for remote access, and then point to your external address.
Example: http://MyServer.com/eioboard

Initial Setup

After you first install the iPhone application, you will be led through a couple questions to set up your account (similar to the PC application). First, you will be asked if you have an existing account or if you want to start a free trial. Assuming you have either already started a trial or have already purchased EIOBoard, be sure to choose **Existing Account** here.

You will then be asked for your hosting option. If you have an account in the cloud, choose **EIOBoard-Hosted**. If you have your own EIOBoard server, choose **Customer-Hosted**. If you aren't sure which option to pick, please contact your EIOBoard administrator.



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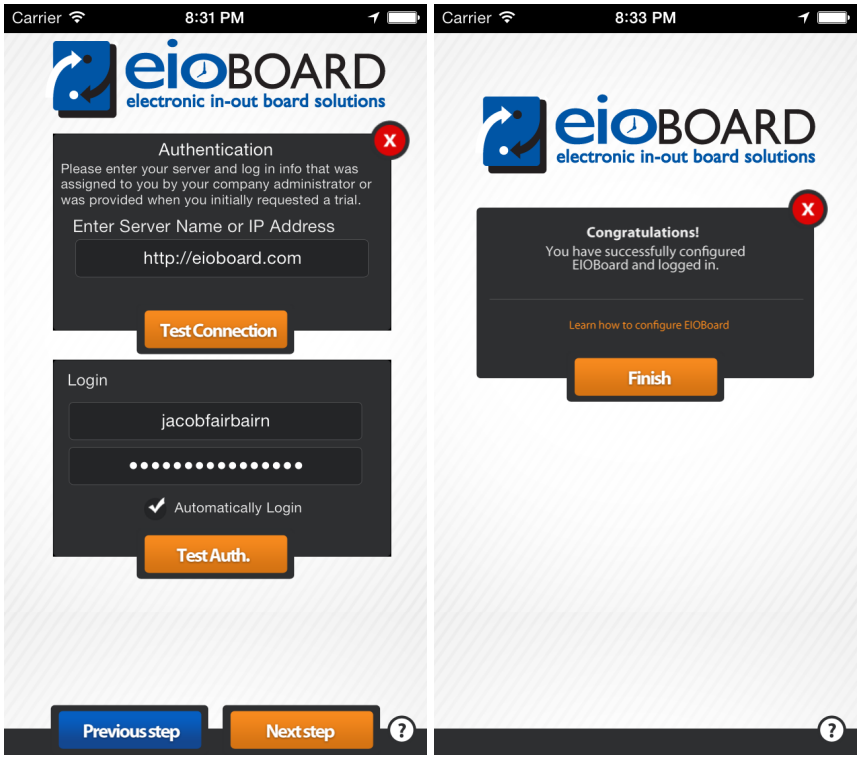
Now you have to specify your EIOBoard server and credentials. If you are EIOBoard-Hosted, the server address will automatically default to http://eioboard.com. If you are Customer-Hosted, you will need to specify the external address of your EIOBoard server. If you aren't sure what this address is, please contact your EIOBoard administrator. You can click **Test Connection** in order to be sure that you have typed in the correct server name and that your application can connect successfully.

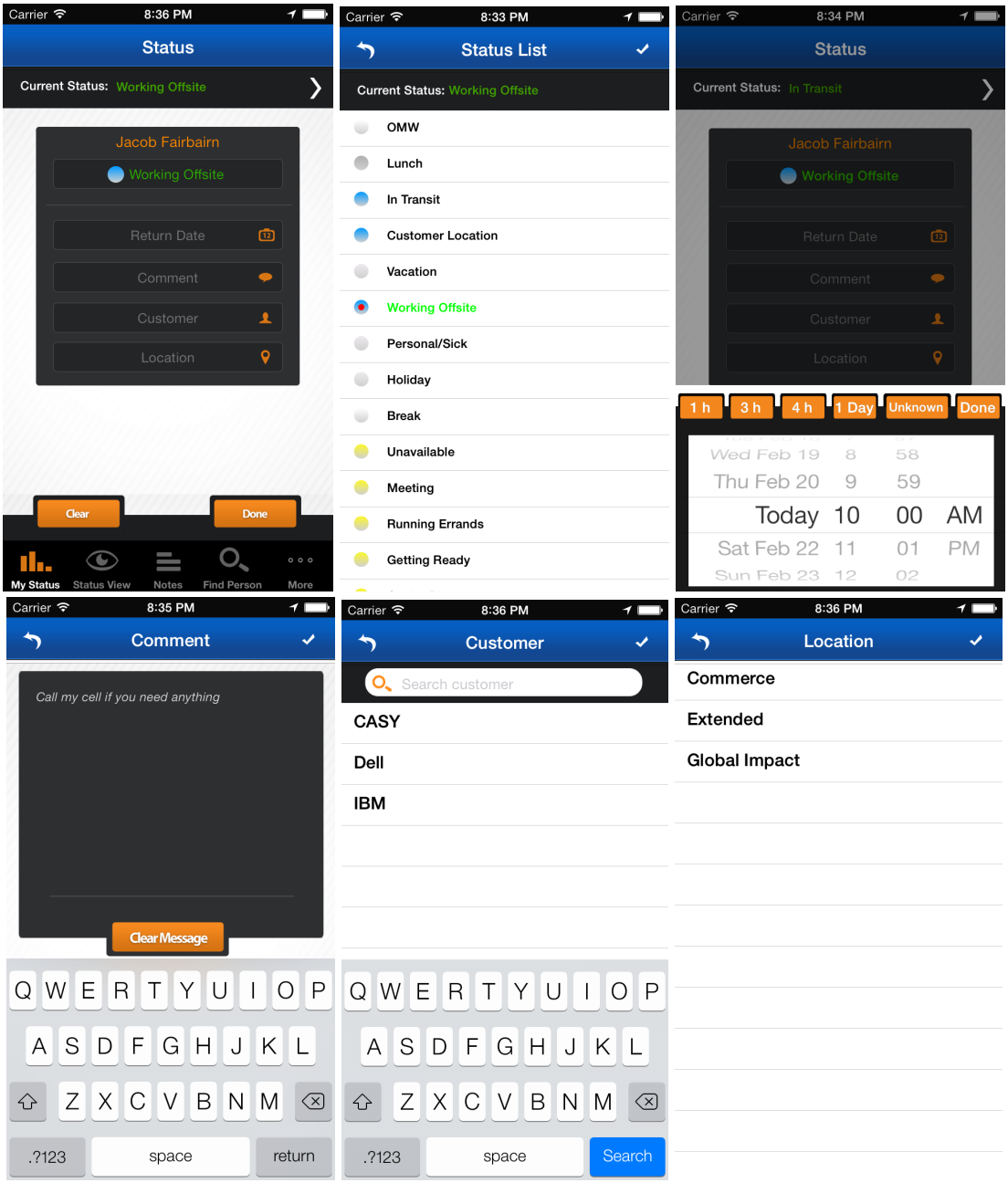
Once you have specified the server, type in your username and password at the bottom. You can click **Test Auth**. to make sure that your username and password are correct. If you check **Automatically Login**, then you will be automatically logged into EIOBoard any time the application is opened. Otherwise, you will have to enter in your username and password each time the app is opened.

Once you have entered in the correct information, you will be taken to a page that let's you know that you have been logged into your EIOBoard account successfully!



Change Your Status

The first section in the iPhone App is the **My Status** section. This allows you to view or change your current status. Simply click the status under your name and select the new status from the list. Then you have four 4 options to specify below that: the return time, the status comment, the customer to associate with this status, and the location you are at. All of the last options are typically optional, but they allow you to add details to your status if necessary. An example of each can be seen below.



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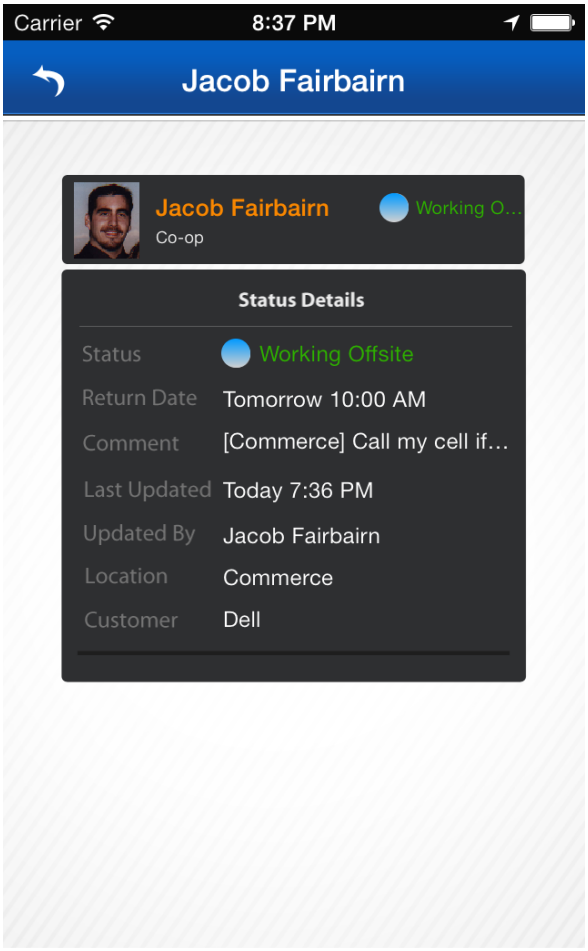
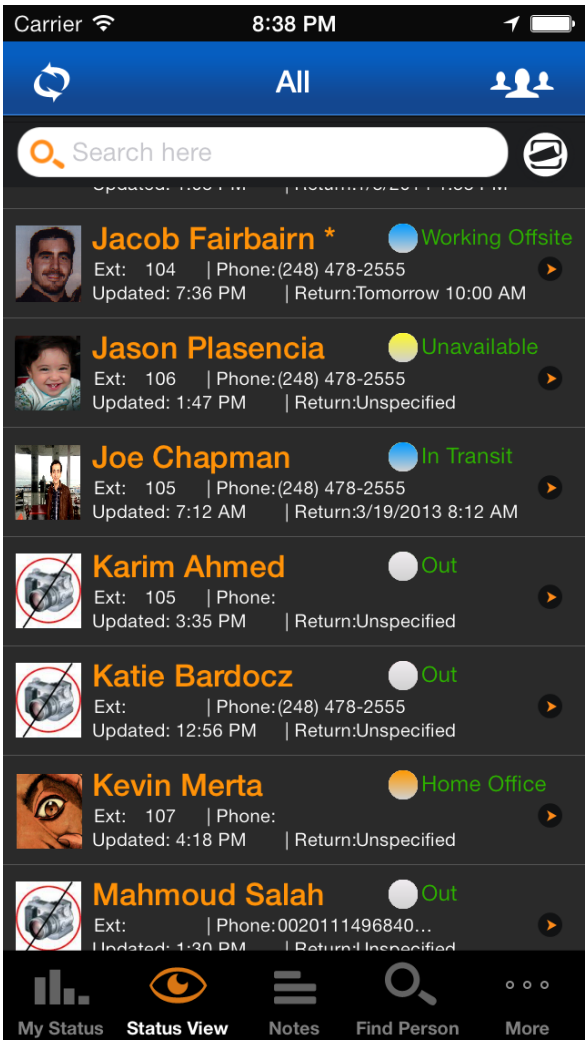
Before or after you change your status, you have the option to view all the details for your current status. Simply click your current status at the top of the **My Status** section, and you will be taken to a page with all your status details. An example of this can be seen below.



Status View / Find Person

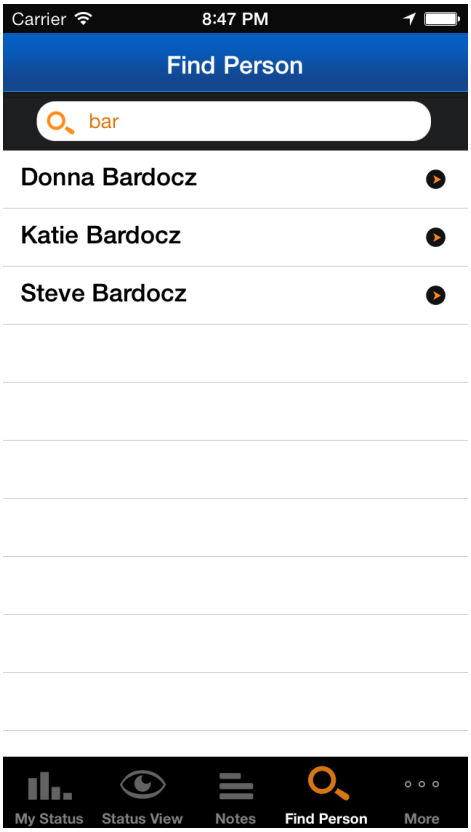
If you would like to view all user's statuses, simply go to the **Status View** section. By default, all user's will show up. You can refresh the page at any time by clicking the refresh button at the top left or by scrolling up past the top of the list.

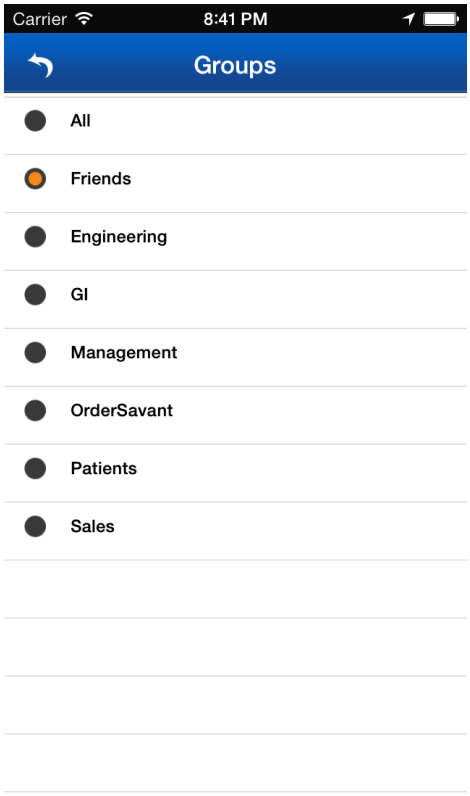


There are also various methods to filter users. If you know the name of the user, you can search for him or her by using the search bar at the top. You can also go to the **Find Person** section at the bottom to search for specific users.

You can also filter by status, group, location, etc. To filter by group, click the icon on the top-right of the screen. To filter by location or by status, click the icon below the group icon. In each case, simply choose the status, group, or location that you want to filter by so that only the matching users will show up. When you are done, you can change the filters back so that all users

show up again. An example of **Find Person** and filtering by groups can be seen below.





If you click on any user in **Status View** or in **Find Person**, you can bring up their Contact Details to view more information about them. This shows basic information such as email, phone number, extension, etc. You can also view more information about the user's current status by clicking on the user's name or picture at the top.

You can also send the user any type message from this screen. Click on a user's email to send him an email. If you would like to text a user, send a user a Note, or Chat a user, you can do so by clicking the **Send Msg** button.

And finally, you can see the user's current location on the GPS by clicking **Locate**. Please note that this feature is only available if the user is also using the GPS feature on the iPhone.

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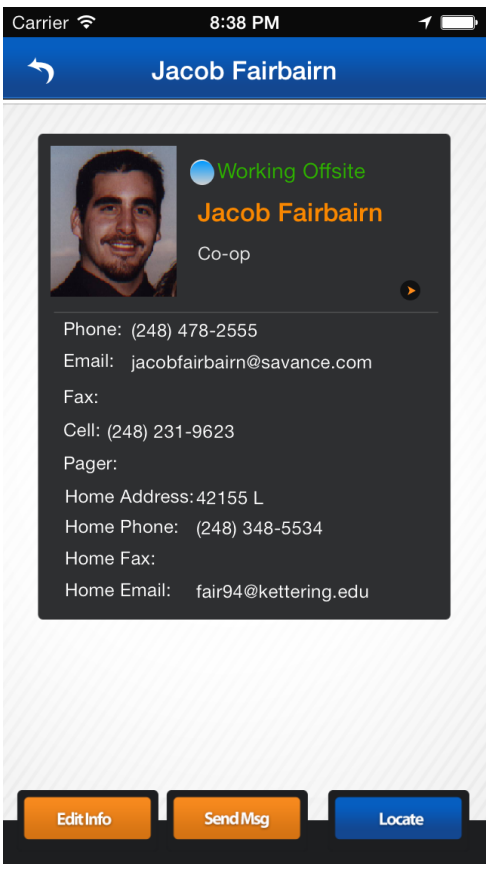
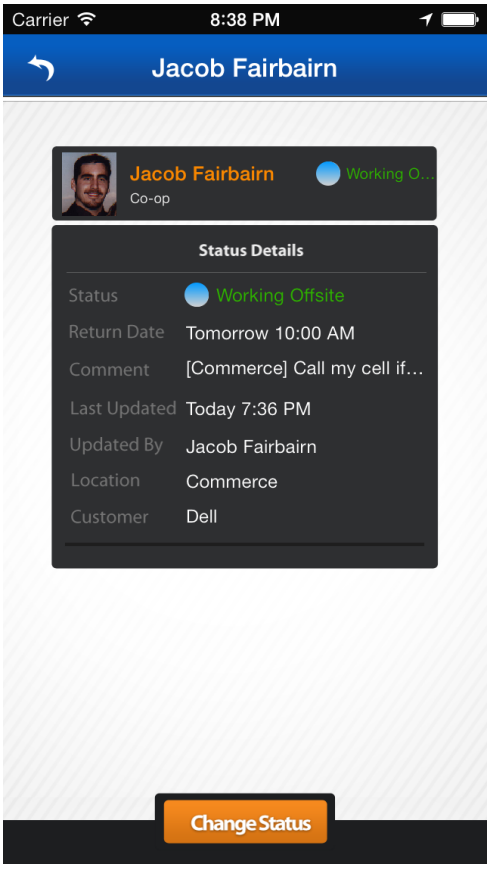
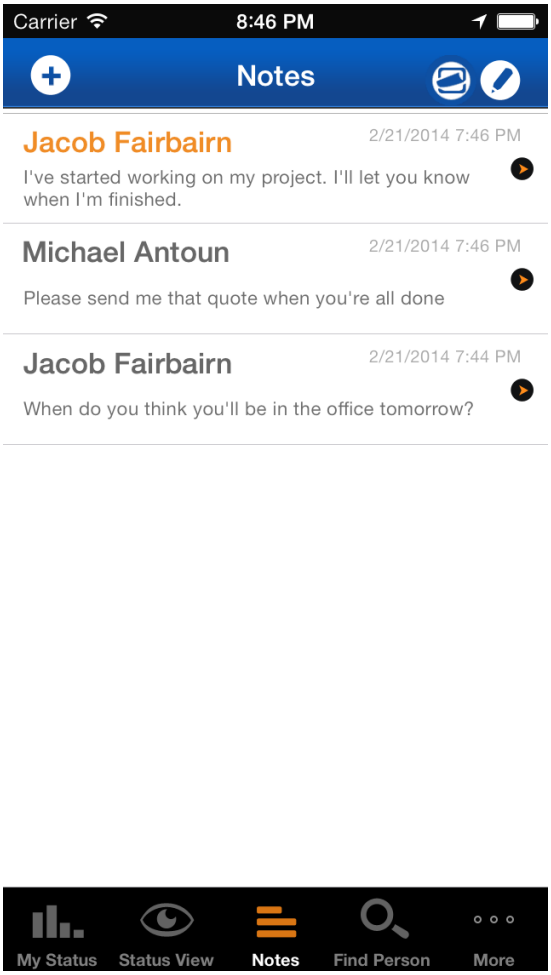
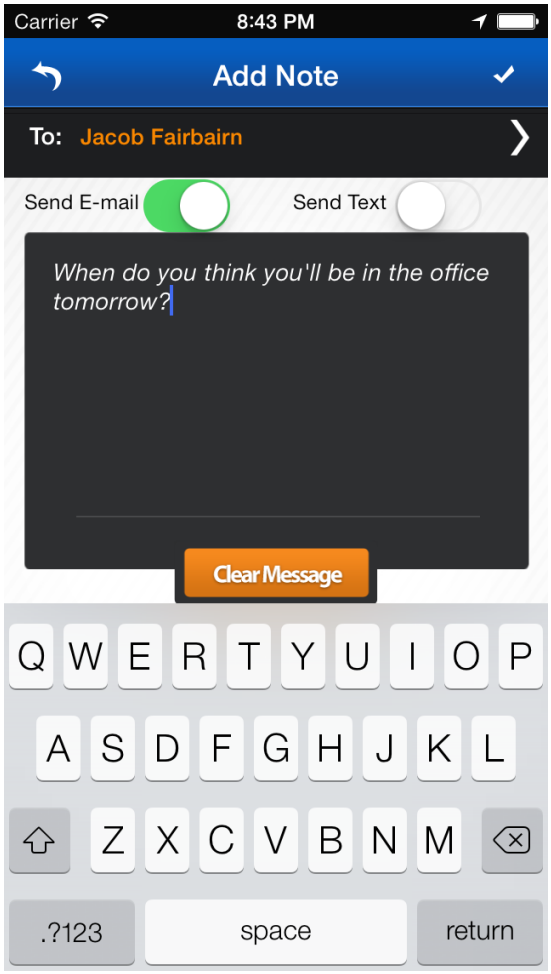




Note

If you go to the **Notes** section, you will be able to see all notes that have been sent to you. Unread notes will display the users name in orange, and read notes will display the users name in grey. Simply click on the note to open up the full messages. Then you can respond to other users by either clicking the "(+)" at the top-left of the screen or by clicking **Reply** after opening a message. You can also send users notes from their Contact Details. This is a great way to communicate with users, regardless of whether they are using EIOBoard on an iPhone or a PC!

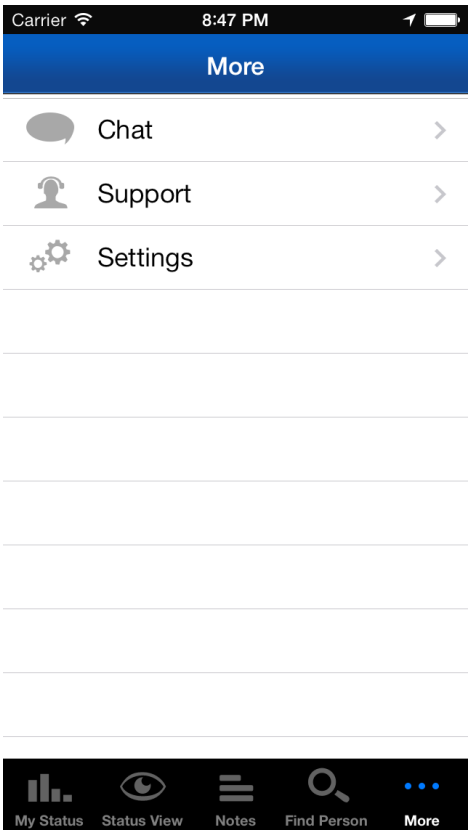




More

If you go to the **More** section, you have a couple of different options. Each will be described in further detail in later sections. Here is a list of each of your options:

- **Chat**
- **Support**
- **Settings**

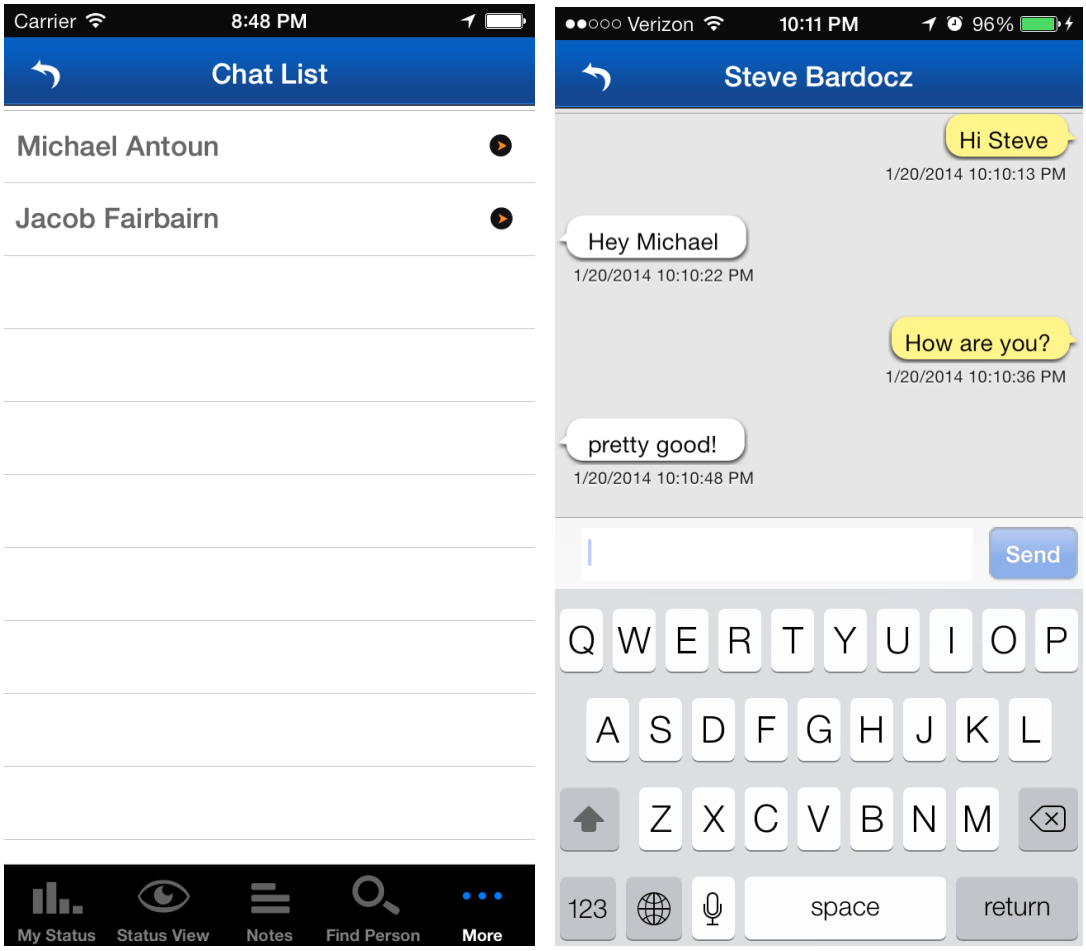


6.1 Chat

The **Chat** feature of the iPhone app allows you to instant message with other EIOBoard users. You may chat users who are using the iPhone App or any of the PC applications. This is a convenient and efficient way to communicate with other users in your organization.

To initiate a chat with a user, search for the user in the Status View or Find Person. Click **Send Msg** and choose to open a chat with the user. Then you will be able to hold a chat conversation with this user, as seen below. Also, if you go to **More** > **Chat**, you will be able to see all of your current conversations, allowing you to open a chat where you left off, even after going to other areas of the application.

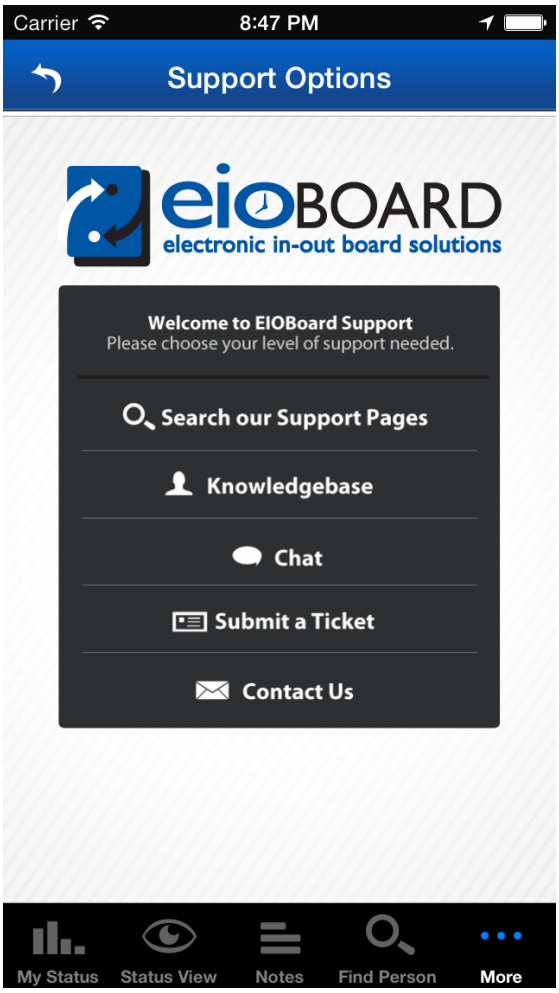
Please note that you can only chat with other users who are online and available for chat. You can tell if a user is online based on whether or not they have an asterisk (*) next to their name on the status board.



6.2 Support

The **Support** section allows you to contact EIOBoard's support in a case where you have a question, issue, or comment about EIOBoard. You have a couple of different options, each of which are described below.

- **Search our Support Pages**: This takes you to a page EIOBoard's website that allows you to search for general support questions and answers
- **Knowledgebase**: This takes you to EIOBoard's knowledgebase, which includes feature guides and FAQ.
- **Chat**: This will open a window in your browser, allowing you to chat with an EIOBoard support or sales representative.
- **Submit a Ticket**: If you would like to open a support case with EIOBoard's support, this will allow you to do so from EIOBoard's website.
- **Contact Us**: This will allow you to see EIOBoard's contact information, such as the support/sales phone numbers, email address, etc.



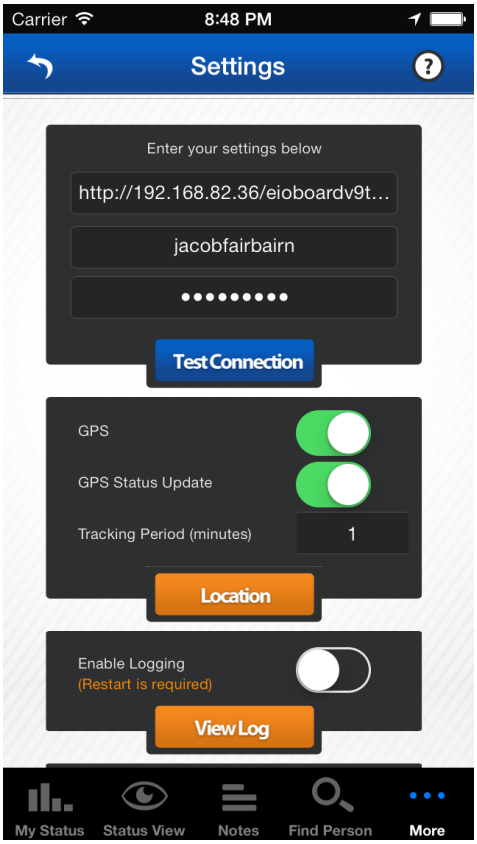
6.3 Settings

The **Settings** section allows you to configure a couple of different things for EIOBoard, but it won't be changed often while you are using the application. If you need to change your server or which user you are logged in as, you can do so in the top section of the settings.

Below that, you may turn GPS tracking on or off at any time. If you would like to keep the GPS locator on but would not like it to automatically update your status, you can also turn **GPS Status Update** off. And finally, you can specify how often you would like EIOBoard to check your current location (which is used for when other users want to locate you and for automatic status updates).

Below the GPS section, you may turn the log on/off, and you may view the log at any time. This is used mainly for technical and troubleshooting purposes.

And finally, the last setting is **Show Confirmation After Status Change**. If you would like a confirmation message that you status has been changed successfully each time you change it, you may turn this setting on. However, this is optional and does not affect the status update.



GPS Locating

The GPS in EIOBoard's iPhone app has many useful features. First of all, if you would like to enable the GPS locating, you must do so in **More** > **Settings**. Then you can click the **Location** button to view your current location on a GPS map. An example of this can be seen below. You can also locate another person by opening up their Contact Details and clicking **Locate**.

NOTE: You can also add other users to your GPS or change the look and feel of your GPS by clicking the options button on the bottom-right of the screen (it looks like a flipped up page).

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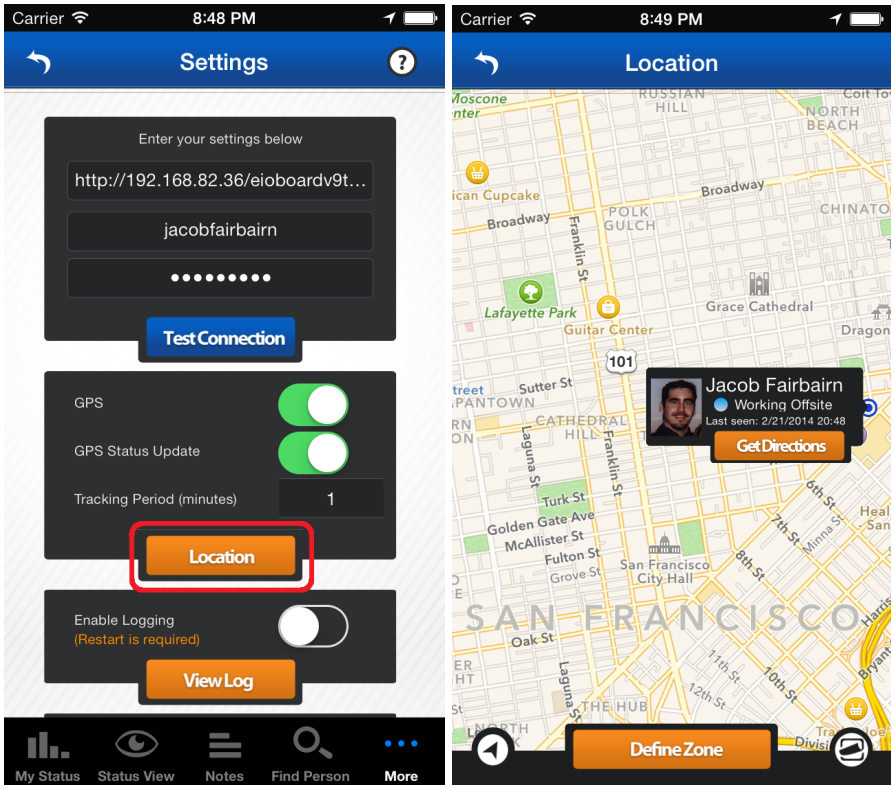
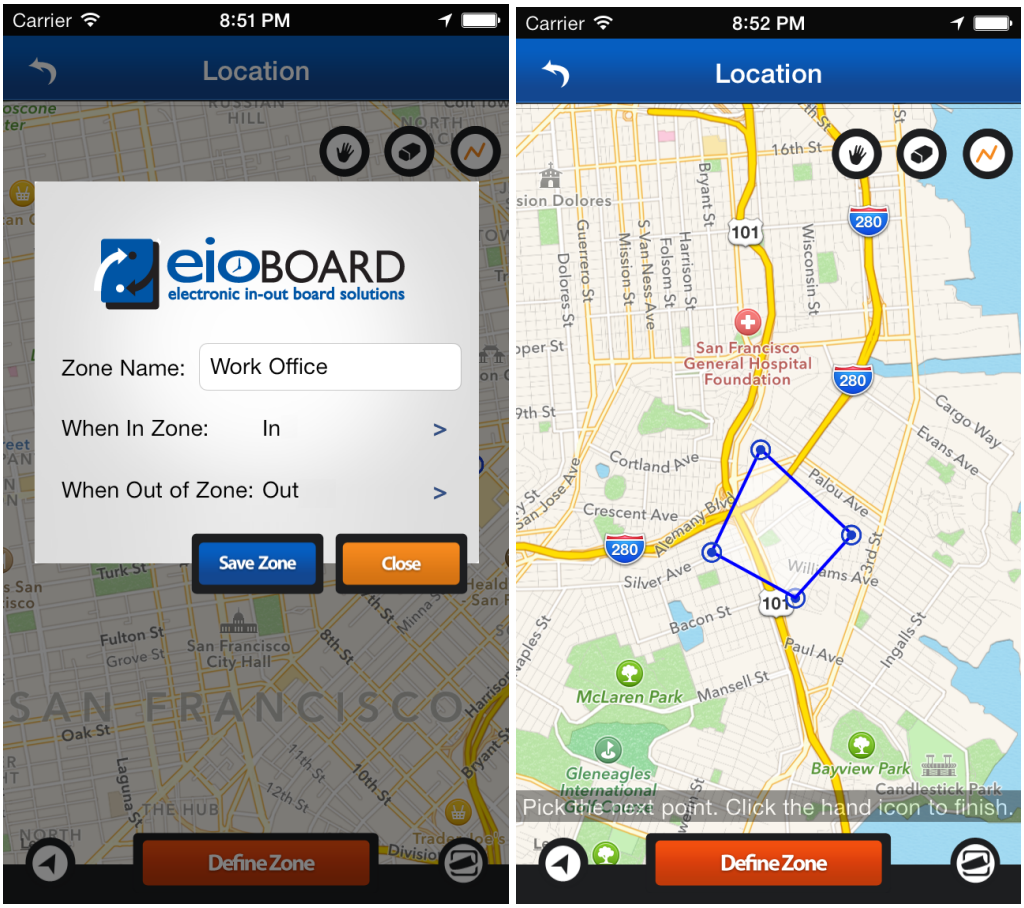


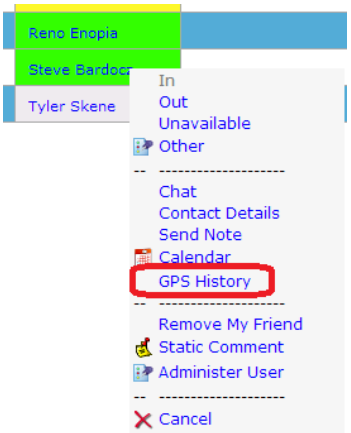
The GPS feature allows you to automatically change your status based on your physical location! For example, let's say you want your status to change to **In** when you go to your work office, and you want it to change to **Out** when you leave the work office. First, you would have to define the zone. In the GPS screen, click **Define Zone** and then click on the icon. Give the zone a name, and then you can define which status you would like to change to when you enter the zone and when you leave the zone. An example of this can be seen below. Note that you can change your Out status to **Do Nothing** if you don't want your status to automatically change when you leave.

Once you click **Save Zone**, you will be asked to define the zone. Simply tap the screen to define the first point in the zone. Based on that first point, you can tap the screen again to create the other corners of the zone. In this case, you would want to create a box around your work office so that your status would change as you enter the zone around your work office. When you are done, click **Define Zone** again to save the zone. Now your status will change automatically when you enter this zone! The GPS feature allows you to create as many zones as you would like.

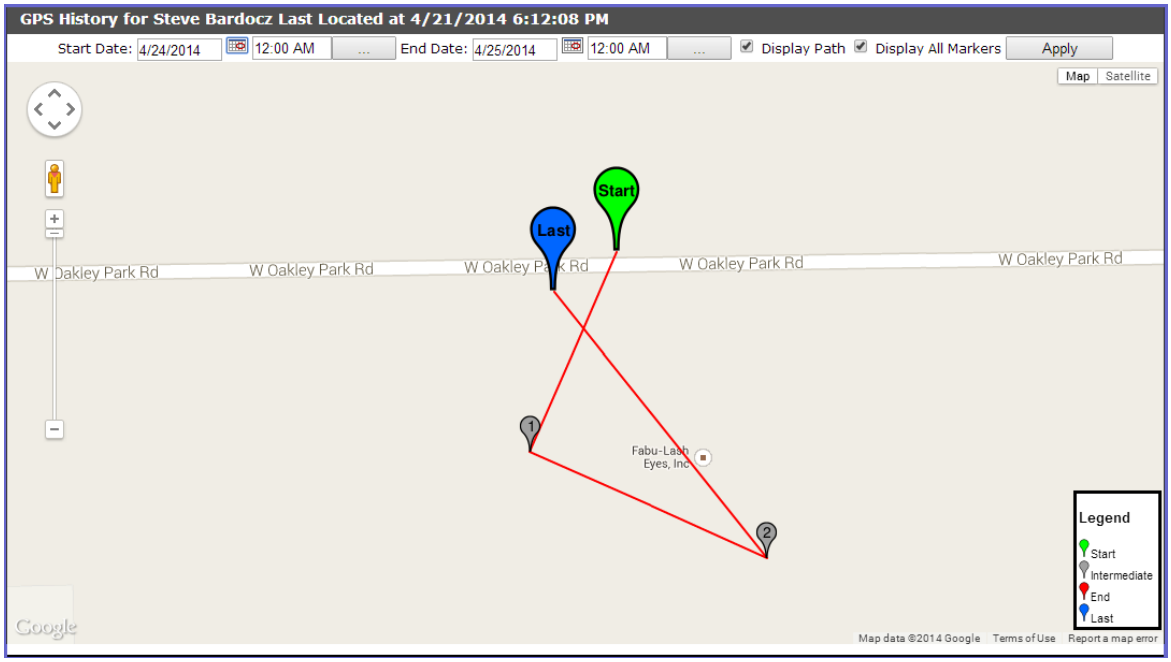


Viewing GPS History

If you would like to view a user's GPS History, this can be done through EIOBoard's web interface. Simply log in to your version of EIOBoard's web interface and bring up the status board. Then right-click on the user whose GPS History you would like to view, and select **GPS History**.



The screen seen below will come up. It is essentially a Google Map with markers based on where the user was located by the iPhone app's GPS feature.



You can navigate around the map just as you would on Google: drag your way around the map, zoom in and out, change views on the top-right, or even change to the street view by dragging the yellow peg man on the top-left on to the map.

There are a couple of different options for showing the markers. First of all, you can change the date range of when markers are shown, allowing you to see a user's path during a specific time or date. If you check **Display Path**, a red line will come up that will show the exact path the user took to get from the first marker to the last marker. If you check **Display All Markers**, then all Intermediate markers will show up rather than just the Start and Last markers. Below is a definition for each kind of marker:

- **Start**: This is the *first* location detected in the given date range
- **Intermediate**: These are all the points between Start and End/Last where the user was detected. These are shown only if **Display All Markers** is checked, and it determines how the path (the red line) is drawn.
- **End**: This is the ending location in the given date range. The Last marker will show up instead if the End location is the same as the last detected location
- **Last**: This is the location where the user was last detected. So if it was updated recently, then this is the user's "current location".

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