

**SAVANCE**  
EIOBOARD

## **Customer-Hosted Add-In Getting Started Guide**

**Savance**

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## Customer-Hosted Add-In Getting Started Guide

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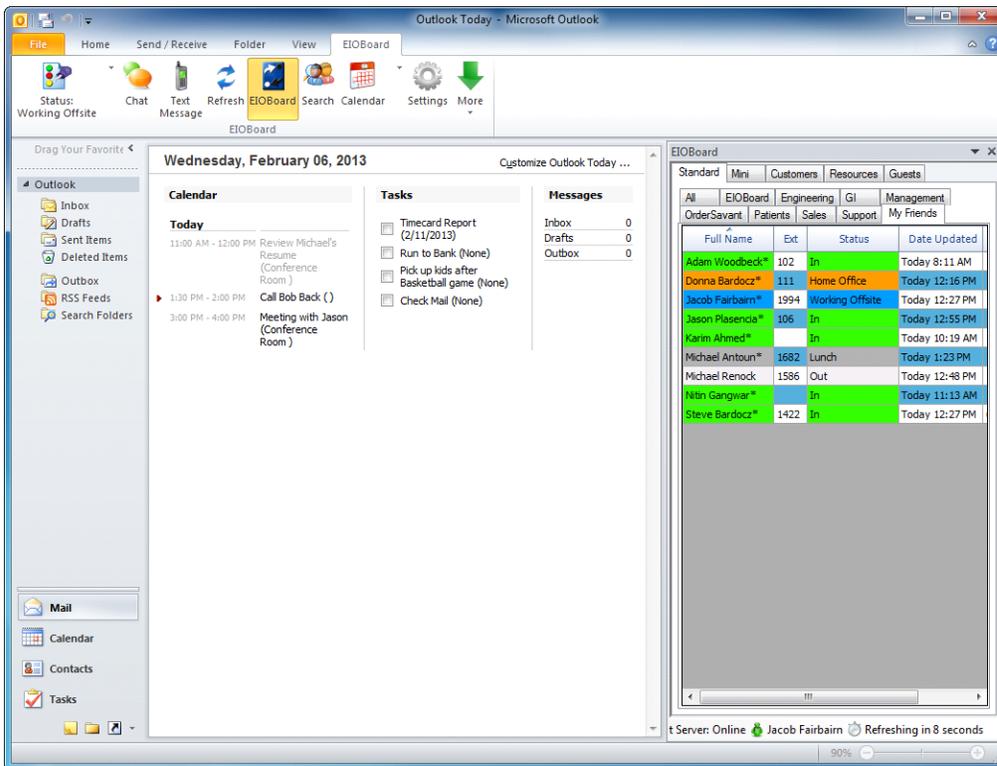
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## What is EIOBoard?

Quickly see who is in and out at a glance! EIOBoard (short for “Electronic In-Out Board”) is a simple and easy to use desktop, online, and mobile software tool used for **employee attendance tracking**, time and attendance, interoffice communications, and more. Our **in out board** gives users the ability to send private instant messages, leave phone messages electronically, keep electronic timecards, create shared calendars, and more. This document will show you how to use the basics of our EIOBoard Outlook Add-In, which can be seen below.



If you would like to view more detailed information on what our EIOBoard is, please view the following site: [What is an In-Out Board?](#)



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# Getting Started with the EIOBoard Add-In

If somebody has already installed EIOBoard on your computer, please click here: [Logging into EIOBoard](#). If you have to install EIOBoard, please read the section below.

## 2.1 I am installing EIOBoard myself

In order to install EIOBoard on your own, you must obtain the install file from your administrator (your administrator should provide instructions on how to get this file). When you have this file, run it on your computer to download the EIOBoard Add-in. If your administrator instructs you to download the install file from [eioboard.com](#), be sure to install the corresponding file: there is one file for Outlook 2007 and earlier, and there is one file for Outlook 2010 and later.

When you open Outlook after installing EIOBoard, you will see the **EIOBoard Getting Started** window. Please make the following selections:





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**EIOBoard Getting Started**

### Hosting Options

Please choose the type of hosting that best fits how your company plans to use EIOBoard.

**EIOBoard-Hosted**



I have an account on EIOBoard.com

**Customer-Hosted**



We installed the customer-hosted Intranet Installer on one of our servers

[Help](#) [Back](#) [Next](#) [Cancel](#)

**EIOBoard Getting Started**

### Authentication

Please enter your username and password that was assigned to you by your company administrator or was provided when you initially requested a trial.

Enter Server Name or IP Address: (Example: http://yourserver/eioboard)

Test Connection

Login

Automatically Login

User Name:

Password:

Use Windows Authentication

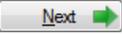
Test Auth.

[Help](#) [Back](#) [Next](#) [Cancel](#)



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In the space provided under **Enter Server Name or IP Address**, enter in the full URL of your server (which is the server that is hosting EIOBoard, usually <http://yourserver/eioboard> depending on whether you installed to an existing site, new site, or virtual directory). This information should be provided to you by your administrator, and it allows you to connect to your company's EIOBoard. To make sure that you typed in the address correctly, click . If the test connection was successful, then you have typed in the correct address.

Be sure to finish off by entering your username and password. Check **Automatically Login** if you would like to be automatically logged into EIOBoard next time you open the application. When you are finished, click . Your EIOBoard Application will then pop up.

### 2.2 Logging into EIOBoard

You can open EIOBoard at any time by clicking on the desktop shortcut. If EIOBoard is already running but is not open, you can open your EIOBoard by going to the bottom-right of your screen and clicking on the  icon (if you are logged in already) or the  icon (if you are not logged in).

If you are not automatically logged into EIOBoard, you will have to provide your username and password when you first log in:



Be sure to enter in your credentials and then click . If you would like to be automatically logged in, check the box next to **Remember my username and password on this computer**.

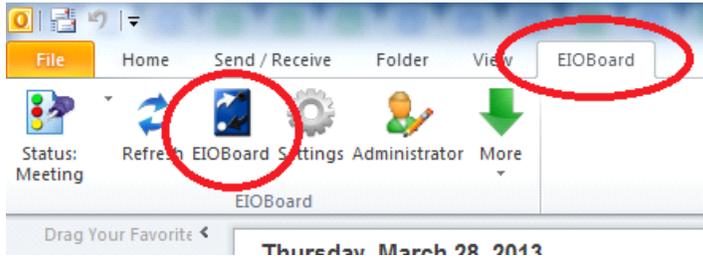


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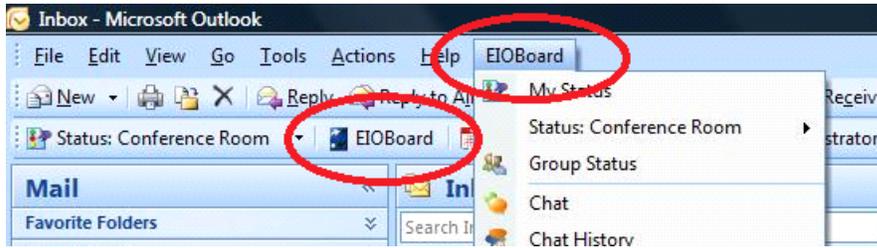
### 2.3 Using EIOBoard within Outlook

If EIOBoard does not open automatically when you open Outlook, you can open it by going to the EIOBoard tab and clicking the EIOBoard button. The status board can also be hidden this way. Once EIOBoard is open, you can move the status board around the Outlook window or change the size at any time. To do so, click the down arrow in the status board, and then click Move or Size.

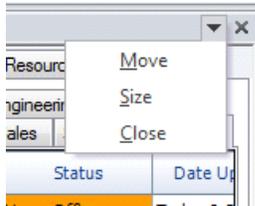
#### Outlook 2007 and later



#### Outlook 2003 and earlier



#### Moving/Resizing the Status Board





## Customer-Hosted Add-In Getting Started Guide

# Updating Your Status

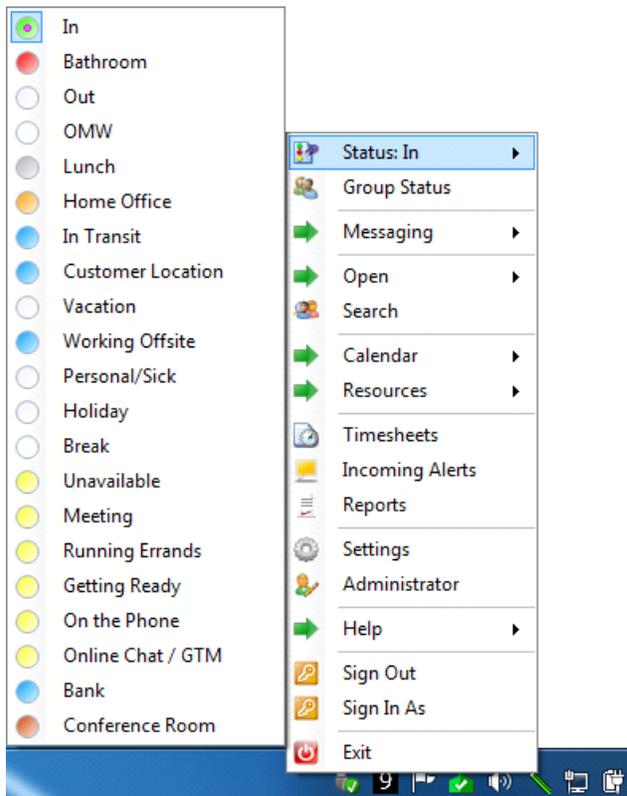
## 3.1 Quick Status Update

If you would like to change your status without any details (like return time, comments, etc.), then you will want to use a quick and easy way to update your status. You have a couple of options, depending on your preferences:

### 3.1.1 Update Your Status With the System Tray

Even if the EIOBoard Add-In isn't open with Outlook, you can still change your status at any time by following these instructions:

1. Right-click the **EIOBoard icon** (🖱️) in the system tray,
2. Go to **Status** at the very top.
3. A list of all available statuses will display. Simply click on any status to quickly change your status.





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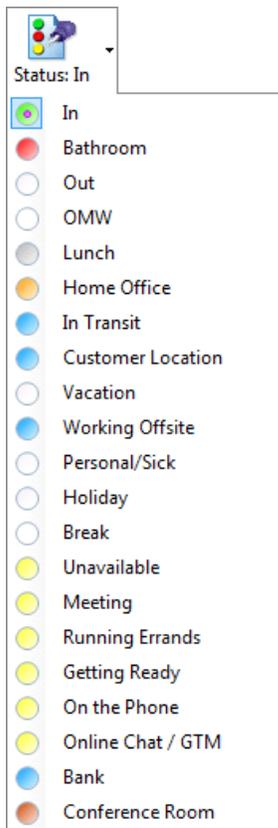
### 3.1.2 Update Your Status In Outlook

1. In the Outlook toolbar, within the EIOBoard ribbon, click on the down arrow on the following



button: Status: In

2. A list of all available statuses will display. Simply click on any status to quickly change your status.





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### 3.2 Detailed Status Update



1. Click on **Status: In** in the Outlook toolbar, within the EIOBoard ribbon.
2. The **Update Status** window will come up.

**Update Status**

**Current Status**

Name: Jacob Fairbairn      Status: Out  
Returning: Unspecified      Comment:

Basic    More

<input checked="" type="radio"/> In	<input type="radio"/> Bathroom	<input type="checkbox"/> Future Status
<input type="radio"/> Out	<input type="radio"/> OMW	One-Click Return Time: <input type="button" value="1 Hour"/> <input type="button" value="3 Hours"/>
<input type="radio"/> Lunch	<input type="radio"/> Home Office	<input type="button" value="4 Hours"/> <input type="button" value="1 Day"/>
<input type="radio"/> In Transit	<input type="radio"/> Customer Location	Returning: 2/ 3/2013    12:00 PM
<input type="radio"/> Vacation	<input type="radio"/> Working Offsite	<input type="checkbox"/> Unknown Date / Time
<input type="radio"/> Personal/Sick	<input type="radio"/> Holiday	<input type="checkbox"/> Use Counter
<input checked="" type="radio"/> Break	<input type="radio"/> Unavailable	Comment: Call my cell if you need me
<input type="radio"/> Meeting	<input type="radio"/> Running Errands	Return Status: <input type="text"/>
<input type="radio"/> Getting Ready	<input type="radio"/> On the Phone	<input type="checkbox"/> Auto Return Status
<input type="radio"/> Online Chat / GTM	<input type="radio"/> Bank	<input type="text"/>
<input type="radio"/> Conference Room		

Filter: <None>    Customer: <None>    Status Location: <None>

Help    Calendar    OK    Cancel

3. Select the **Status** you want to change to.
4. Leave a **Comment**, if necessary.
5. If you would like, you can specify a **Returning Time**.
6. When you are finished, click .



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## Using your Status Board

### 4.1 Standard and Mini Views

When viewing your status board, you have two options for how you want to view all your users. This can be changed by clicking the “**Standard**” or “**Mini**” tabs on the left side of the status board.

#### 4.1.1 Standard View

- Shows users in a list.
- Shows details for each user’s status, such as returning time, comment, location, and more.
- The columns that are shown can be customized by right-clicking on any column header.

My	Full Name	Ext	Status	Time	Date Updated	Comment
<input checked="" type="checkbox"/>	Adam Woodbeck*	102	In		Today 8:14 AM	
<input checked="" type="checkbox"/>	Donna Bardocz*	111	Home Office		Today 7:53 AM	
<input checked="" type="checkbox"/>	Jacob Fairbairn*	1994	Working Offsite		Today 9:42 AM	
<input checked="" type="checkbox"/>	Jason Plasencia*	106	In		Today 8:11 AM	
<input checked="" type="checkbox"/>	Karim Ahmed*		In		Today 9:28 AM	
<input checked="" type="checkbox"/>	Michael Antoun	1682	Out		Yesterday 4:37...	
<input checked="" type="checkbox"/>	Michael Renock*	1586	In		Today 10:06 AM	
<input checked="" type="checkbox"/>	Nitin Gangwar*		In		Today 8:51 AM	
<input checked="" type="checkbox"/>	Steve Bardocz*	1422	Working Offsite		Today 9:42 AM	(TEST COMMENT NEVER GOE...

#### 4.1.2 Mini View

- Shows users in a compact, side-by-side view.
- Allows many users to be seen at once.
- Only displays status color (such as green for In, red for Out, yellow for Unavailable, etc).

All	EIOBoard	Engineering	GI	Management	OrderSavant	Patients	Sales	Support	My Friends
Adam Woodbeck*	Jason Plasencia*	Michael Renock*							
Donna Bardocz*	Karim Ahmed*	Nitin Gangwar*							
Jacob Fairbairn*	Michael Antoun	Steve Bardocz*							



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### 4.2 Groups

You can see all users in a specific group by clicking on one of the group tabs above the status board. This is a handy way to view all users in a specific department, floor, etc. (depending on how it was set up by your administrator). You can also create a custom group for your personal use called **My Friends** by right-clicking on the different users' usernames and clicking **Add My Friend**.



### 4.3 Filtering and Searching Users



By clicking on **Search** in the Outlook toolbar, within the EIOBoard ribbon, you can search for users based on criteria such as their name or extension. You can also filter users, such as by only showing users in a specific location. Simply choose how to search or filter users in the **Search Pane** that displays.

Filter: <None>  
Location: <All>  
Status Type: <All>  
Status: <All>  
Name:   
Ext:   
 Within Selected Group

### 4.4 Other EIOBoard features

If you would like more information on other EIOBoard features, please visit the following sites:

[Sending a Text Message from EIOBoard](#)

[EIOBoard Calendar](#)

[Sending Notes to other users](#)

[Chatting other users](#)

[Customizing Chat](#)

[Viewing your Timesheets](#)



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### Contacting Support

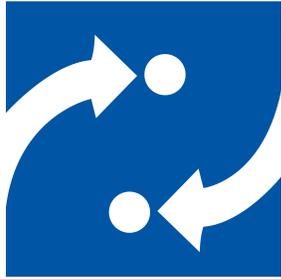
If you require assistance with your EIOBoard (issues, questions, etc.), feel free to contact support through one of the following methods:

1. E-mail your question to [support@eioboard.com](mailto:support@eioboard.com).
2. Call (248) 478-2555 and request the support line.
3. In the EIOBoard main menu, go to **Help > Support/Feedback**. Then fill out the window that comes up.



4. Go to <http://www.eioboard.com> and click on  to enter a live chat with a member of our support team.
5. Fill out the form here: <http://www.eioboard.com/ContactUs>

Please note that our main office hours are from 8am - 5pm (Eastern Time) on Mondays - Fridays.



**SAVANCE**  
EIOBOARD

**Thank you for choosing Savance!**

**Savance**

**Phone: 248-478-2555 | Fax: 248-478-3270**

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