Out'n About! for Outlook
Electronic In/Out Status Board

User Reference Guide

Version 3.2

Contents

Introduction

Welcome

Welcome to the Out'n About! for Outlook User Reference Guide. This guide provides step-by-step instructions on how to use the Out'n About! for Outlook Client software.

Out'n About! is the ideal solution for receptionists or managers to track the whereabouts of employees in their organization. Out'n About! replaces the old fashioned, magnetic in/out status boards commonly used in organizations.

The Out'n About! for Outlook add-in extends and enhances Microsoft Outlook - the world's leading e-mail and scheduling software. It adds all the Out'n About! iIn/Out Status Board features directly into the Outlook interface so you can continue to manage all of your information using a common interface.

This manual contains 2 main sections:

- **In/Out Status Board**
  Description of the Out'n About! for Outlook user interface.

- **Using Out'n About!**
  Instructions how to use the Out'n About! for Outlook features.

Installation and administration instructions are provided in the Out'n About! for Outlook Administrators Guide available on our website.

Please check out our web site at http://www.intelligentconcepts.com to get the latest information and updates for Out'n About! for Outlook.

In/Out Status Board

User Interface

The following section describes the Out'n About! for Outlook user interface.

Main Window

Out'n About! for Outlook is integrated directly into the Microsoft Outlook product. The In/Out Status Board can be displayed by clicking on the 'Out'n About!' folder in the mail folder list (as shown below) or the 'Out'n About!' shortcut in the Outlook shortcuts bar.
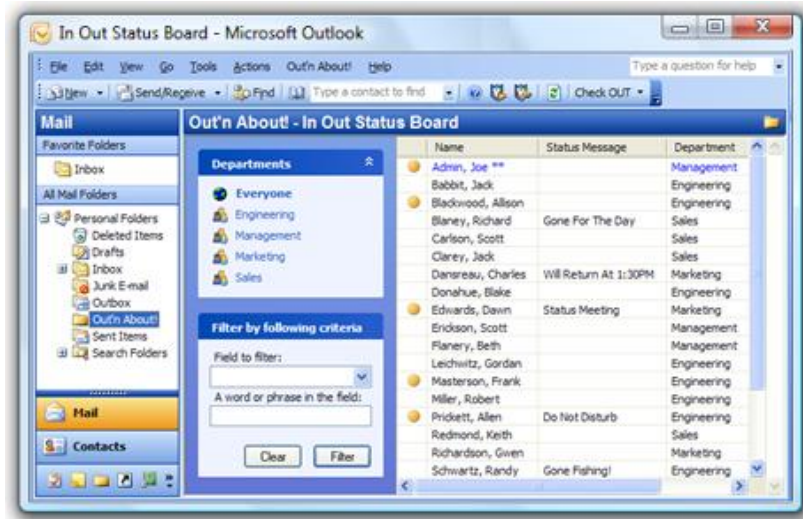
Main Menu (Outlook 2007 and older)

The Out'n About! main menu is available on the Outlook main menu just left of the Help menu. The Out'n About! main menu is used to change your status, set your user information, etc. The administrator sub-menu is only available if you are an Out'n About! administrator.
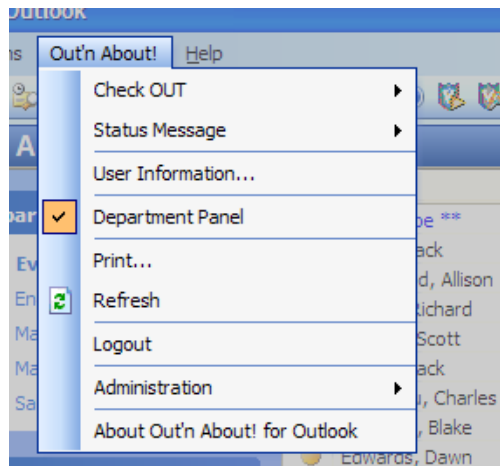

Toolbar

Out'n About! adds two items to the standard Outlook toolbar as shown below.
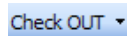

The 'Change Status' drop-down list is always available and is used to quickly change your current status. When you click this button, the software provides a list of status message options. The default status messages are fully customizable as described in the Configuration Options section.
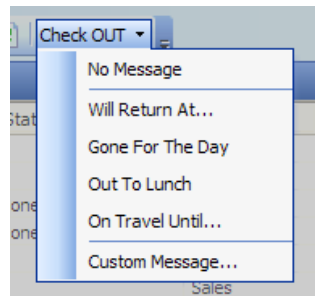

Outlook 2010/2013

Out'n About! for Outlook uses the Outlook 2010/2013 Fluent UI ribbon bar.
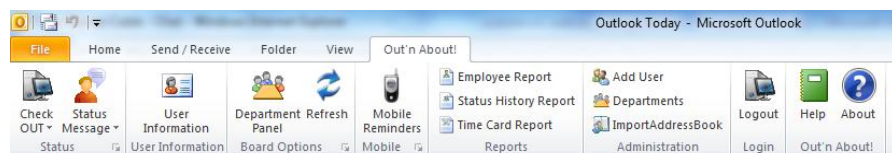
User Menu

The Out'n About! user menu is available by double-clicking or right-clicking on any user on the In/Out Status Board. The user menu is used to display user information, send the user a message, synchronize the user's contact data, etc. The administrator sub-menu is only available if you are an Out'n About! administrator. The change status sub-menu items are only available if the user is yourself or you are and Out'n About! administrator or receptionist.
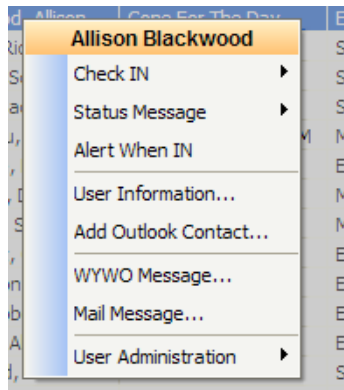
Status Board

The In/Out Status Board displays information about each user in the system. The status board is the most important feature of the Out'n About! software. The status board contains one row of information for each employee that has been added to the Out'n About! system.

	Name	Status Message	Department	Business Phone
●	Admin, Joe **		Management	555-3948
	Babbit, Jack		Engineering	555-0299
	Blackwood, Allison	Gone For The Day	Engineering	555-6354
●	Blaney, Richard		Sales	555-0093
●	Carlson, Scott		Sales	555-0222
	Clarey, Jack		Sales	555-8643
	Dansreau, Charles	Will Return At 1:30PM	Marketing	555-2837
	Donahue, Blake		Engineering	555-5698
●	Edwards, Dawn	Status Meeting	Marketing	555-7687
	Erickson, Scott		Management	555-7427
	Leichwitz, Gordan		Engineering	555-0878
●	Masterson, Frank		Engineering	555-1098
	Miller, Robert		Engineering	555-3423
●	Prickett, Allen	Do Not Disturb	Engineering	555-7645
	Redmond, Keith		Sales	555-1111
	Richardson, Gwen		Marketing	555-1322
	Schwartz, Randy	Gone Fishing!	Engineering	555-3335

Column Descriptions

Status Column

Out'n About! displays the current status of each user in the system using the classic In/Out marker (●) . This makes it easy to see at a glance whether a user

is available or not. If you set an alarm to alert when the user has checked In, a small alarm icon (🔔) will be displayed.

Name Column
The name column shows the full name of the Out'n About! user. Your information is displayed in blue text to allow you to quickly identify yourself on the board. Receptionist users have a single asterisk (*) after their name. Administrators have two asterisks (**) after their name.

Status Message Column
The status message column displays amplifying information about a user's current status.

Information Columns
There are a number of information columns that can be displayed for each user, such as phone number, department, fax number, etc. These columns are derived from the default Outlook contact data form and can be selectively displayed as you see fit.

Selecting Columns

You can decide what information you would like displayed for each user to best fit your needs by selecting the column(s) to display on the In/Out Status Board.

To select the columns you wish to include on the board, right-click on any of the column headings. The software will display a menu of the commonly viewed columns for quick selection. You can also select the 'More…' menu item to see all of the columns available for display.

Rearranging Columns

You can rearrange the Out'n About! columns so they are in the order you wish to view them. This way you do not have to scroll the status board to see the information that is important to you. Note: the default columns cannot be moved (i.e., status, name, and status message).

To move a column, left click on the column header and hold down the mouse button. Drag the column to the position you would like and release the mouse button.

Resizing Columns

Columns widths can be resized to match the width of the actual data being displayed.

To adjust the width of the column, position your mouse pointer over the divider at the right edge of the column header. When the mouse pointer changes into a double-headed arrow, click and hold down the left button of your mouse, then drag the divider until the column is wide enough. If a column is not wide enough to display the information, you can position your mouse pointer over the data and a tooltip will appear with all of the data displayed.

Alternatively, if you double-click the mouse when the double-headed arrow cursor is shown, then software will automatically resize the column to best fit the data being displayed.

Sorting

You can sort the information on the In/Out Status Board by the contents of a column. You can sort text, numbers, dates, etc. in ascending or descending order.

To sort a list in ascending order, click the heading of the column you wish to sort. To sort the list in descending order, click the heading of the column again.

Quick Select

To quickly select a user on your *Out'n About!* board, type the first few letters of the user's last name. If a matching name appears on the status board, it will be highlighted. This is useful for organizations with a large number of users on the board.

If you are unable to find a user's name on the Out'n About! status board, make sure you have selected 'Everyone' from the Department List and you have cleared any filters.

Department Panel

Out'n About! allows users to be assigned to different departments within the company such as marketing, engineering, sales, or accounting.

The Out'n About! Department Panel allows you to quickly select different departments for viewing. Click on any of the department names listed in the Departments Panel and the In/Out Status Board will only display the employees who belong to that department.

The department panel also contains a filter dialog which allows you to filter users by different search criteria.


The Out'n About! Department Panel can be turned off and on to provide more room for the In/Out Status Board, by selecting the 'Department Panel' menu item from the 'Out'n About!' menu.

Using Out'n About!

Connection Settings

When you first start Outlook after installing Out'n About!, the software will prompt you for connection and login information.

Enter the server address provided in the new user confirmation e-mail and enter your e-mail address.
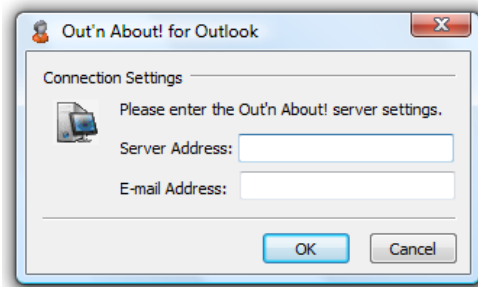
Logging In

After entering the connection settings, you will be prompted for your password to login to the system. Enter the password provided in the new user confirmation e-mail. If you do not want to enter your password each time you start Outlook, you can select the 'Remember My Password' option.
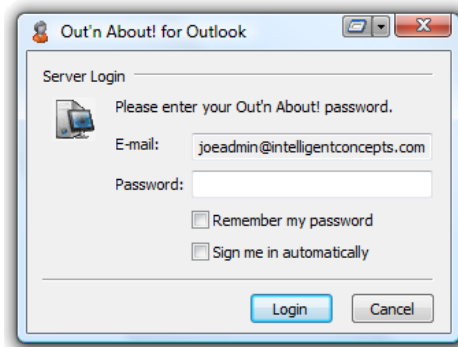
Note: you can change your password later as described in the Configuration Options section.

User Information

Out'n About! provides information about each user for display on the In/Out Status Board. This information is maintained by each employee or Out'n About! administrator and can be used to add or synchronize your Outlook address book.

When you first log in to the Out'n About! system, the software will prompt you to fill in this information so other users see up to date information about you. The software automatically fills in each item with your default Outlook contact data the first time you update your information.

Contact Synchronization

Out'n About! includes a contact synchronization system that allows users to update their Outlook address book based on information provided in the Out'n About! system.

To synchronize or add a contact to your Outlook address book, double-click or right click on the user and select the 'Add Outlook Contact…' or 'Synchronize Outlook Contact…' menu item.
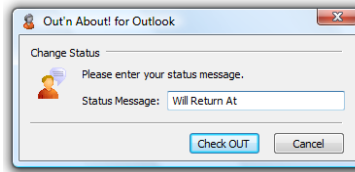
Changing Status

You can perform a status message update when you leave your desk for any reason, such as lunch or a meeting. This feature can also be used to indicate when you are in the office but are not available or do not want to be disturbed.


System Tray Icon

When you are logged into the Out'n About! system the software places an icon (👤) in the system tray to allow you to quickly identify and change your status when the Outlook application is minimized.

If you place the mouse cursor over the Out'n About! tray icon, the system will provide a tooltip indicating your current status and status message. You can also quickly change your status by right-clicking the tray icon to display the status change menu.

WYWO Messages

You no longer need a message pad or a separate messaging program to communicate missed calls, etc. For example, when you receive a call for another employee, you can quickly check their availability using the board, and then move right to the Message Pad - saving time and eliminating the chance of lost message slips.

To send a While You Were Out message, double-click or right click on the user and select the 'WYWO Message…' menu item.
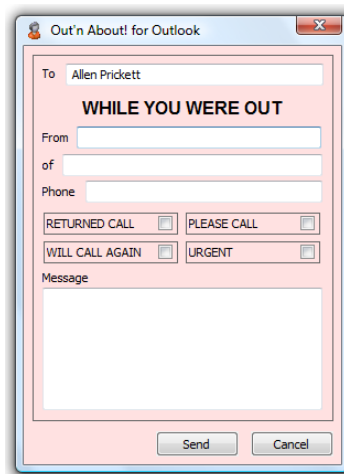

Once you have entered all the necessary information in the message pad, click the 'Send' button. The Out'n About! software will send the WYWO message directly to the user via an Outlook message.

Configuration Options

All of the Out'n About for Outlook configuration options are available in the Out'n About! for Outlook Option menu. If you are using Outlook 2010, click on the ribbon bar dialog launcher buttons at the bottom of each ribbon section.

Default Status Messages

The Out'n About! default status messages are fully configurable to allow the status message option you frequently use.
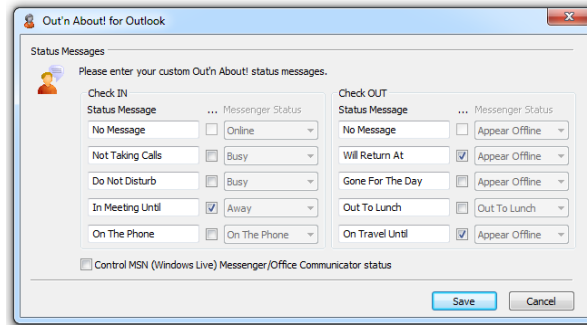
If a status message requires further input, e.g. 'In meeting until', select the more information needed checkbox (…).

Board Options

Using this dialog you can set the In/Out Status Board refresh rate. The board will automatically be updated at this rate.
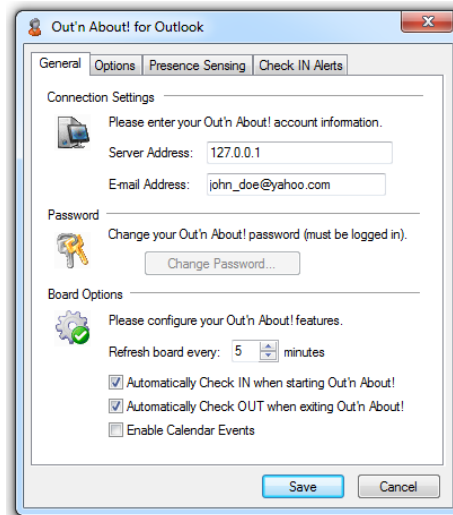
You can also set the board to automatically log out each time you shut down Outlook. If you select the automatic checkout when you shutdown Outlook, the following dialog will be presented at shutdown. The system will automatically log you out if you do not respond to the dialog within 16 seconds.
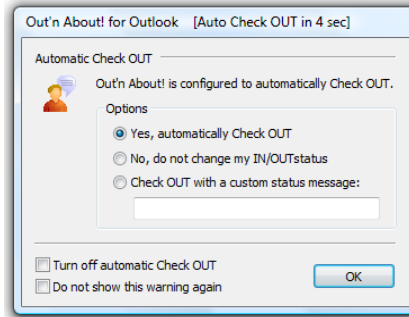
You can turn off automatic check out and/or tell the software to never present this warning again. If you decide you want to show the dialog again after selecting the do not show option, simply turn off automatic check out, save the options, then turn it back on and this dialog will appear the next time Outlook is closed.
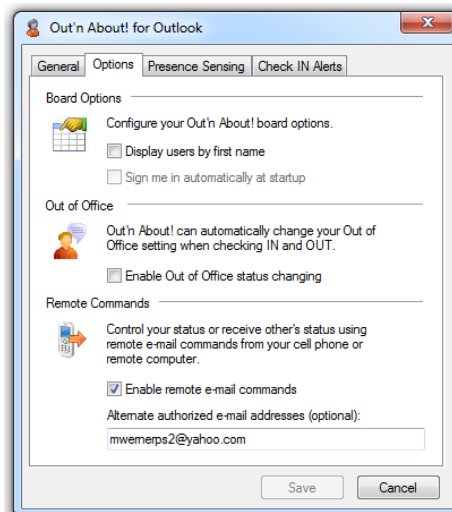
Change Password

You can change your password at any time by clicking the 'Change Password' button on the Out'n About! Board Options dialog:
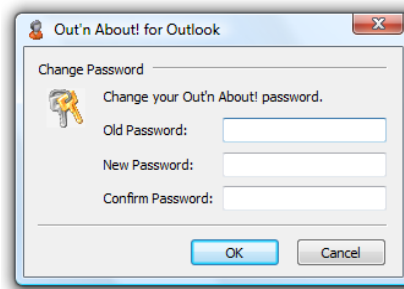
Advanced Options

The Advanced Option dialog allows you to control advanced features of the Out'n About! system.

Remote Commands

The Remote Commands option allows you to change your Out'n About! status and retrieve other's status via remote e-mail message commands. This way if you are away from your desk you can change and retrieve status using your mobile device or remote computer. Note: your Outlook client must be opened in order to receive and process the commands.

The e-mail address used to send the command must be your Outlook e-mail address or an authorized e-mail address you entered in the Advanced Options dialog. You can authorize multiple e-mail addresses by separating each e-mail address with either a comma ',' or semicolon ';'.

Remote commands must be entered in the message subject. The following command syntax can be used (information within the "< >" is optional:

checkin <status message>
This command changes your status to IN and sets your status message to the specified message. e.g. "checkin Do Not Disturb"

checkout <status message>
This command changes your status to OUT and sets your status message to the specified message. e.g. "checkout Gone for the Day"

**getstatus <email address/department/everyone>**
This command returns the status of the individual(s) specified. If you do not specify an individual your status is returned via e-mail. You can also specify an e-mail address, department name, or everyone. e.g. "getstatus Marketing".

All commands return an e-mail witch status change details (for verification) or the individual(s) status details.

Presence Sensing

The Out'n About! system contains a presence sensing features that can automatically set your status based on computer usage.
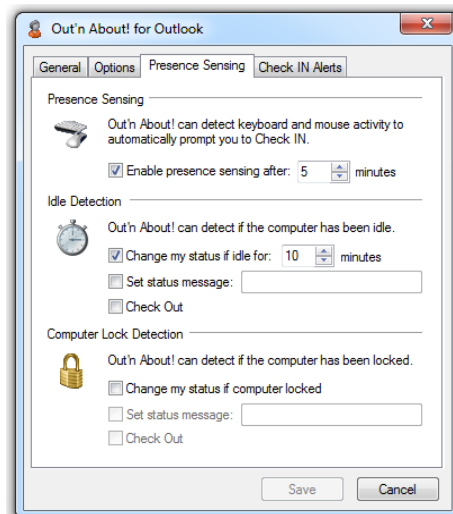
When the presence sensing option is turned on and you move your mouse or use your keyboard, the Out'n About! software will automatically prompt you to check in. If you are not ready to check in, you can snooze the presence sensing feature for a specified amount of time by pressing the snooze button.
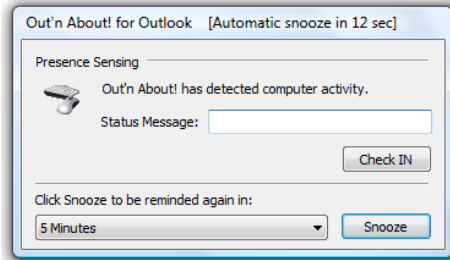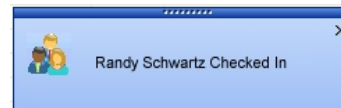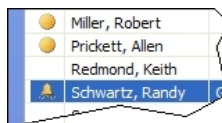

Check In Alert Settings

The Out'n About! check in alert option allows you to request an alert when another employee checks in. This eliminates the need to constantly check the status board when you need to speak to another employee as soon as they are available.
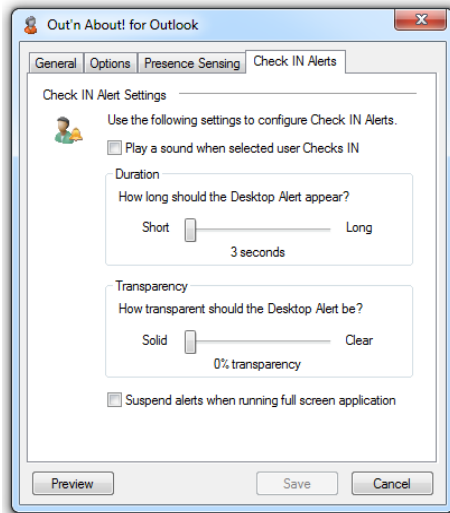

To set a Check In Alert, double-click or right-click on the user and select the 'Check In Alert' menu item. A small alert icon (🔔) will be displayed in the Status column for that user. When the user checks in, you will receive a desktop alert similar to an Outlook 2003 desktop alert:

Mobile Reminders

The Outlook Reminder and Out'n About! Check IN Alert windows are useless if you are not sitting in front of your computer.

The Out'n About! Mobile Reminder feature solves this problem allowing you to automatically forward Outlook Reminders (appointments and tasks) and Out'n About! Check IN Alerts to your mobile phone, pager, or any e-mail address when you are away from your desk.
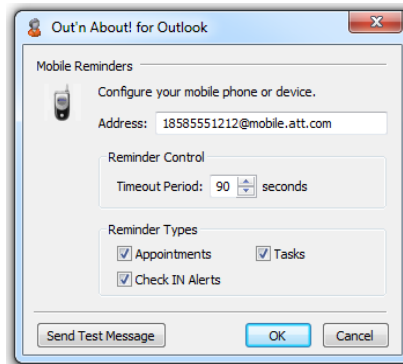
When any of your Outlook Reminders popup, Mobile Reminders will wait for you to Snooze or Dismiss the reminder. If you do not Snooze or Dismiss the reminder within the Mobile Reminders timeout period, the reminder will automatically be sent to the mobile device you have configured in the Out'n About! Mobile Reminders dialog. The same is true for any Out'n About! Check IN Alerts you may have configured.

Calendar Status Events

Out'n About! for Outlook allows you to schedule future status events (e.g., meetings, travel, or vacation) based on Outlook Appointment items. When you open an existing appointment or create a new appointment, click on the Out'n About! Calendar Event toolbar button to configure a future status change. When the appointment occurs, Out'n About! will automatically change your status based on the settings you define.
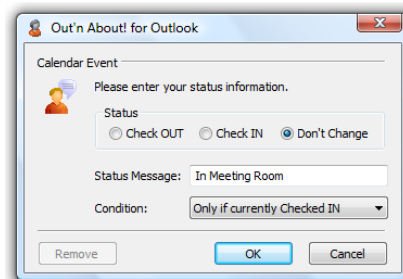
You can also have the Calendar Event check to see if you are currently Checked In or Out and only set the new status if the condition is met. This is useful when you are out of the office (e.g., sick, meeting, or travel) and you do not want the Out'n About! software to check you In for a meeting, etc.

Reports

Out'n About! for Outlook provides a variety of reports to support and help manage your organization. Reports are available from the Out'n About! for Outlook main menu.

Employee Report

The Employee report displays a customizable list of all employees in the organization or a specific department. You can select and define the display order of any fields available in the Out'n About! system.
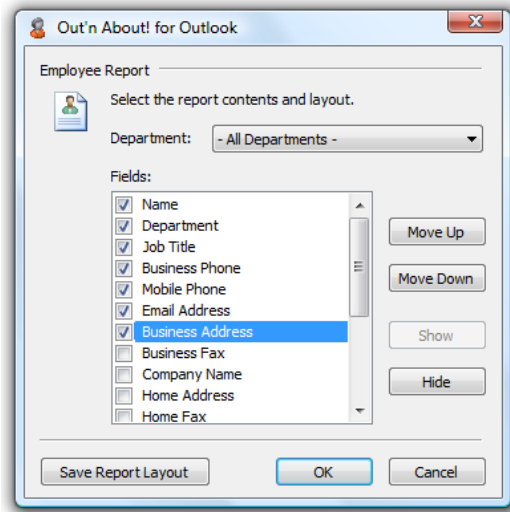
Status History Report

The Status History report displays all status changes for the selected employee(s). Administrative and Receptionist users can run reports on any user in the system. Normal users can only run reports about themselves. Note: This report might not be available if the administrator has turned off status history logging.
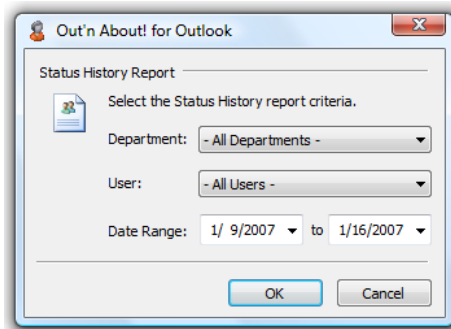
Time Card Report

The Time Card report displays a daily total of hours the user was checked in as well as a total for the selected period. Administrative and Receptionist users can run reports on any user in the system. Normal users can only run reports about themselves. Note: This report might not be available if the administrator has turned off status history logging.