SAVANCE WORKPLACE

Workplace Web Browser Status Board Guide

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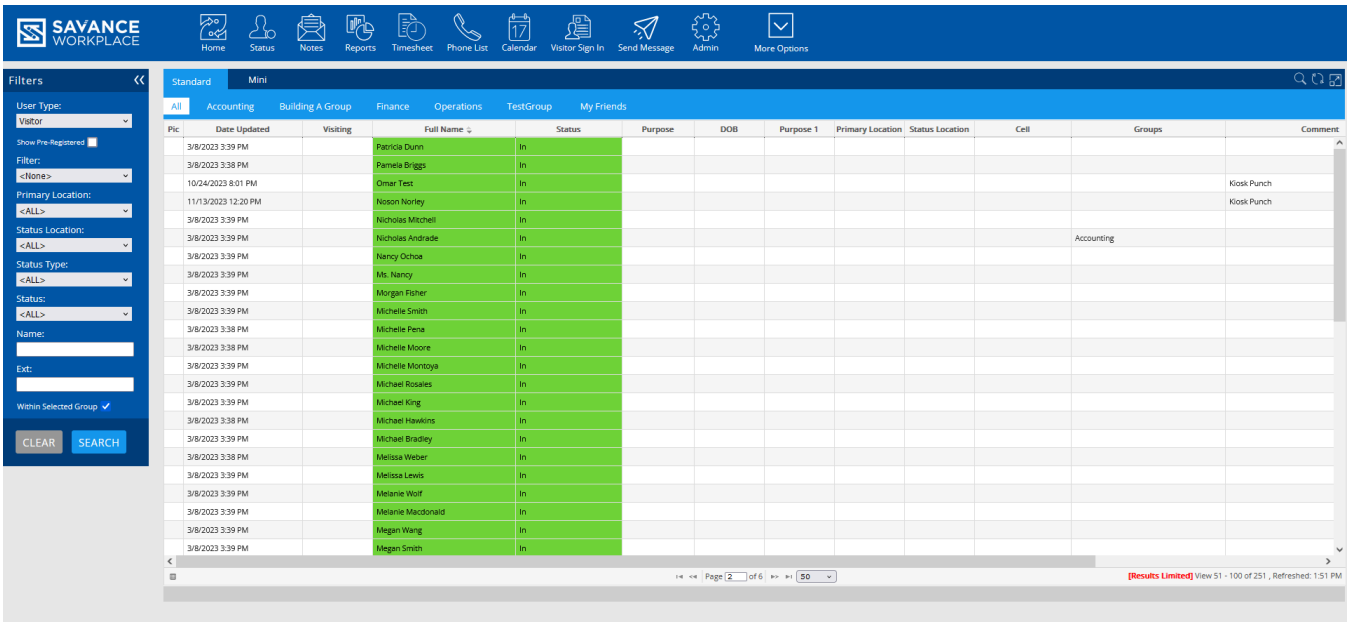
Overview

This Guide will go through the features and abilities of the home screen status board found in the browser interface. You can reach this page via Cloud.savanceworkplace.com for Cloud customers. For On-Premises customers, please use your site's website/IP instead.

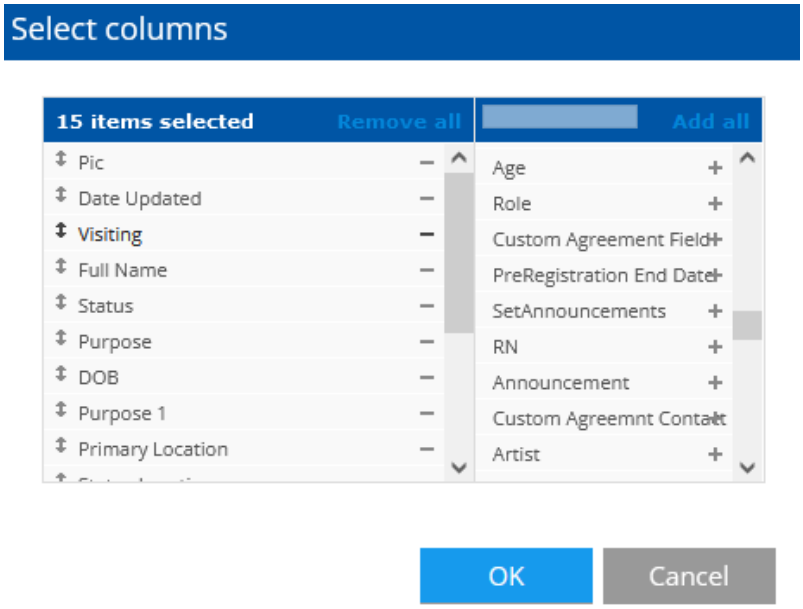
Home Screen



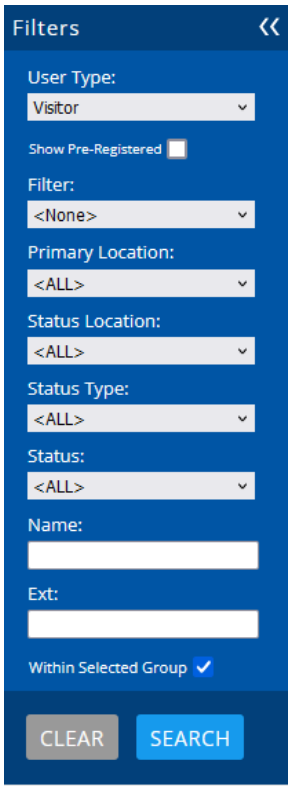
The Home screen is a fully customizable status board with tons of shortcuts to other features within the browser. Anyone with a login can access this screen unless given the Reports only role exclusively. This board auto refreshes every 180 seconds however this time can be configured as needed

Configuring your Home Screen

To edit your home screen, simply drag and drop columns into your desired position. You can right click any column to pull up the 'Select Columns' menu. The '-' sign removes columns while the '+' adds columns. You can also drag columns into your desired order from this menu by dragging the column name



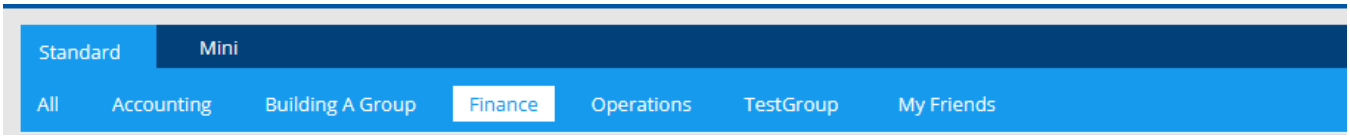
Filters



1. User Type: Staff, Visitor, and Patient are the possible user types
    a. Show Pre-Registered: This appears for visitor user types only. This allows you to see Pre-Registered visitors. These visitors are separate from signed in visitors
2. Filter: Allows you to select pre-built filter settings
3. Primary Location: Shows users with the corresponding Primary Location. Commonly a permanent location
4. Status Location: Shows users with the corresponding Status Location. Commonly a temporary location
5. Status Type: In, Out, and Unavaible Statuses will be shown. Any status with one of these types assigned to them in the Admin section
6. Status: Shows users with the corresponding Status
7. Name: Allows you to search for users with their First or Last Name. Does not need to be their complete name

8. Ext: Allows you to search for users based on their extension within the Savance system
9. Within Selected Group:

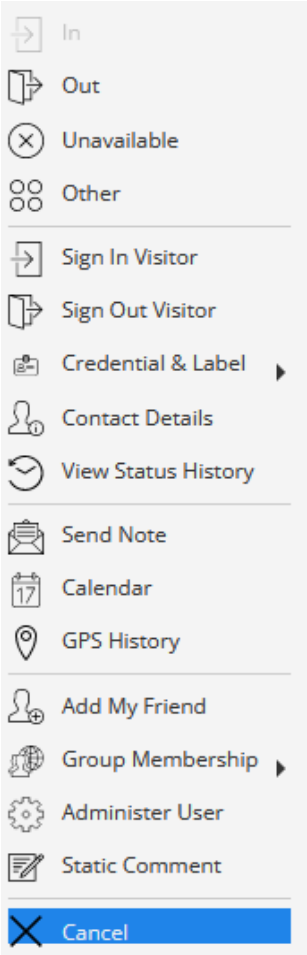
Groups



At the top of your home screen, you can filter your status board with groups. 'All' will always show all users regardless of groups. 'My Friends' is a customizable group that any person can utilize for themselve. This will be explained in a later section

Shortcuts

These can be reached by right clicking on the user who you wish to edit or access. Please note that some of these options might require certain permissions or roles within the Savance program to reach



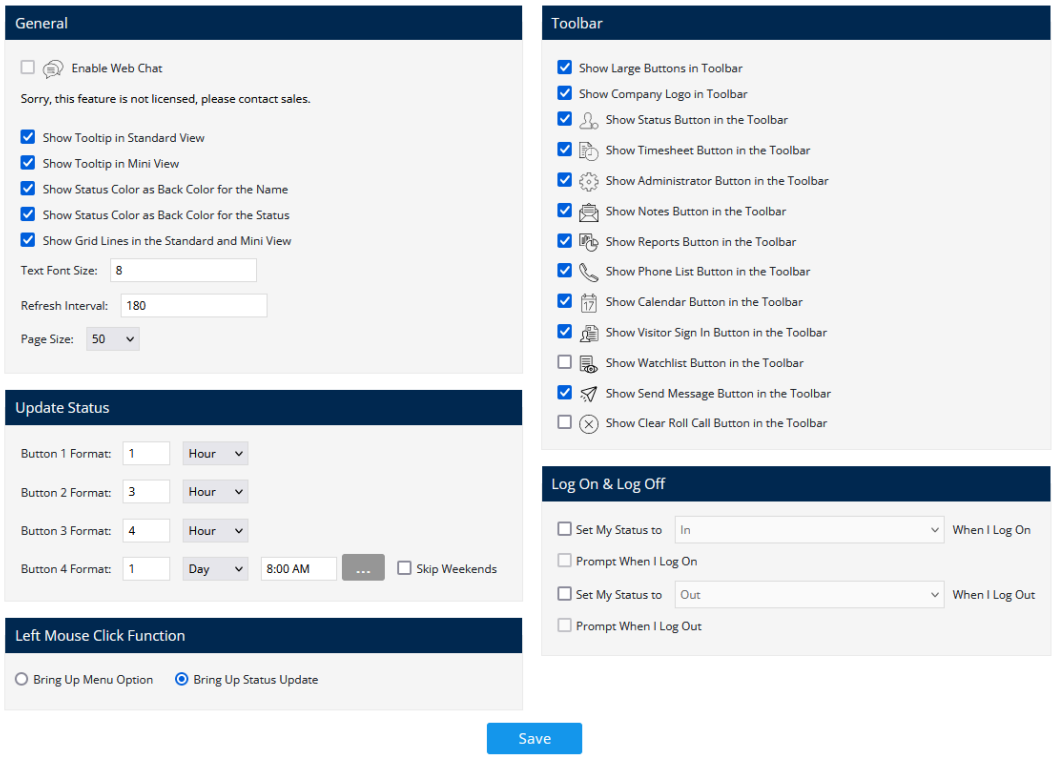
1. In: Sets the user's status to In
2. Out: Sets the user's status to Out
3. Unavailable: Sets the user's status to Unavailable
4. Other: Opens the 'Update Status' Menu
5. Sign In Visitor: Appears for visitor user types. Opens the Browser sign in menu
6. Sign Out Visitor: This will remove the visitor from the status board and sign them out
7. Credential & Label:
    a. Print Credential/Label: Brings you to the Badge/Label print menu
    b. Assign/Activate Credential: Brings you to the Badge Activation menu
8. Contact Details: Open the Contact Details page of the user
9. View Status History: Brings up the user's timesheet menu
10. Send Note: Brings up the Note menu which can be used to send messages via Email/Text

11. Calendar: Opens the User's Calendar within the Workplace System
12. GPS History: Brings up the user's GPS history if they have the Savance Mobile app installed with location tracking enabled
13. Add My Friend: Adds the user to your 'My Friends' group
14. Group Membership: Allows you to manage the user's groups
15. Administer User: Opens the Admin page of the user
16. Status Comment: Allows you to to set a comment on the user's comment field

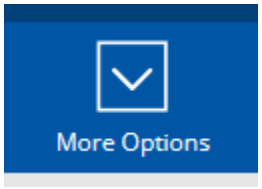
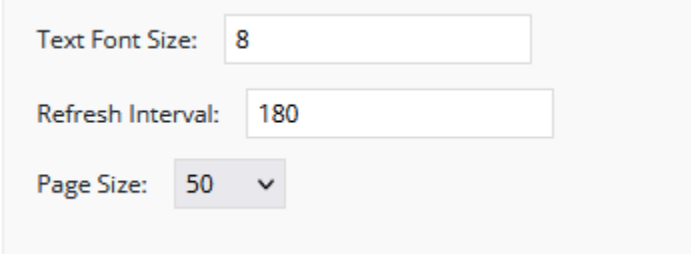
More Customization Options

At the top right of your browser you should see 'My Info & Settings' which has more customization options for your browser status board

After clicking ‘My Info & Settings’, go to My Settings which will bring you to



Here you can hide unnecessary buttons on the top toolbar of your browser. For example if your site uses our Visitor Management System, then you likely won’t use Timesheets or Notes. Unchecking each option then hitting save will move those options into the ‘More Option’ Drop down



You can also change your auto refresh interval from 180 seconds to anything between 30 and 9999 seconds. You can change your browser's font size however anything above 16 could result in improperly displayed text.