

**SAVANCE**  
EIOBOARD

## **Filters**

**Savance**

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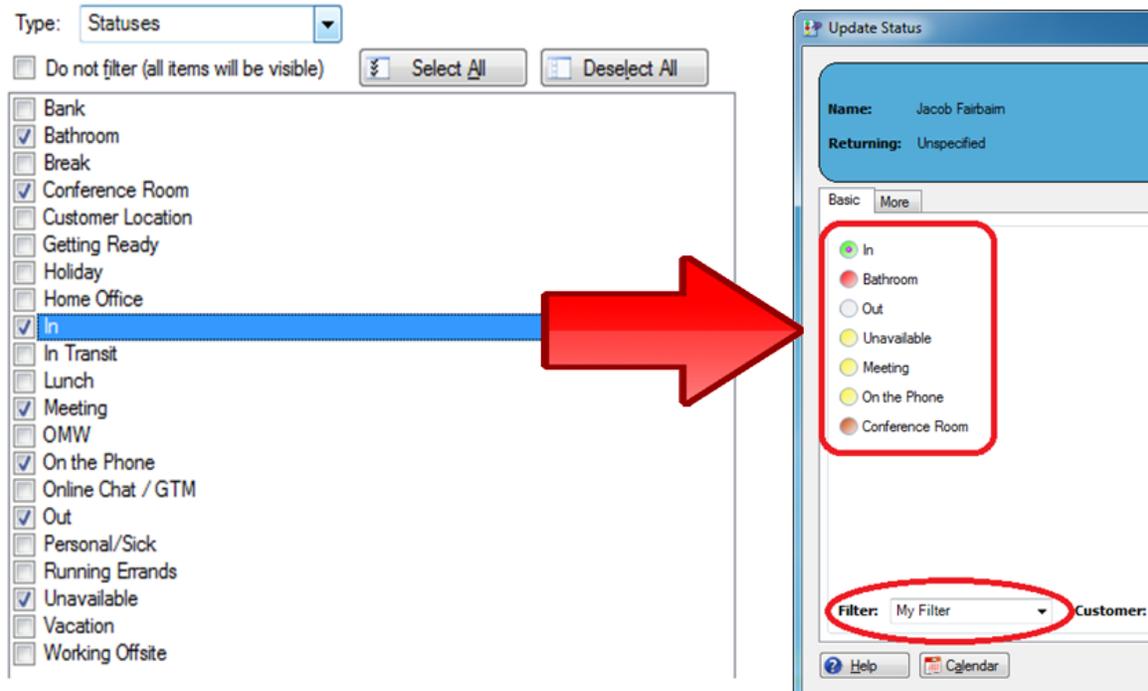
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### How It Works

EIOBoard filters are designed to allow users to hide information that isn't relevant to them. Do your groups or statuses only apply to certain departments or users? EIOBoard allows you to set up filters for the whole company so that each user's EIOBoard only displays relevant information.



### What Can Be Filtered?

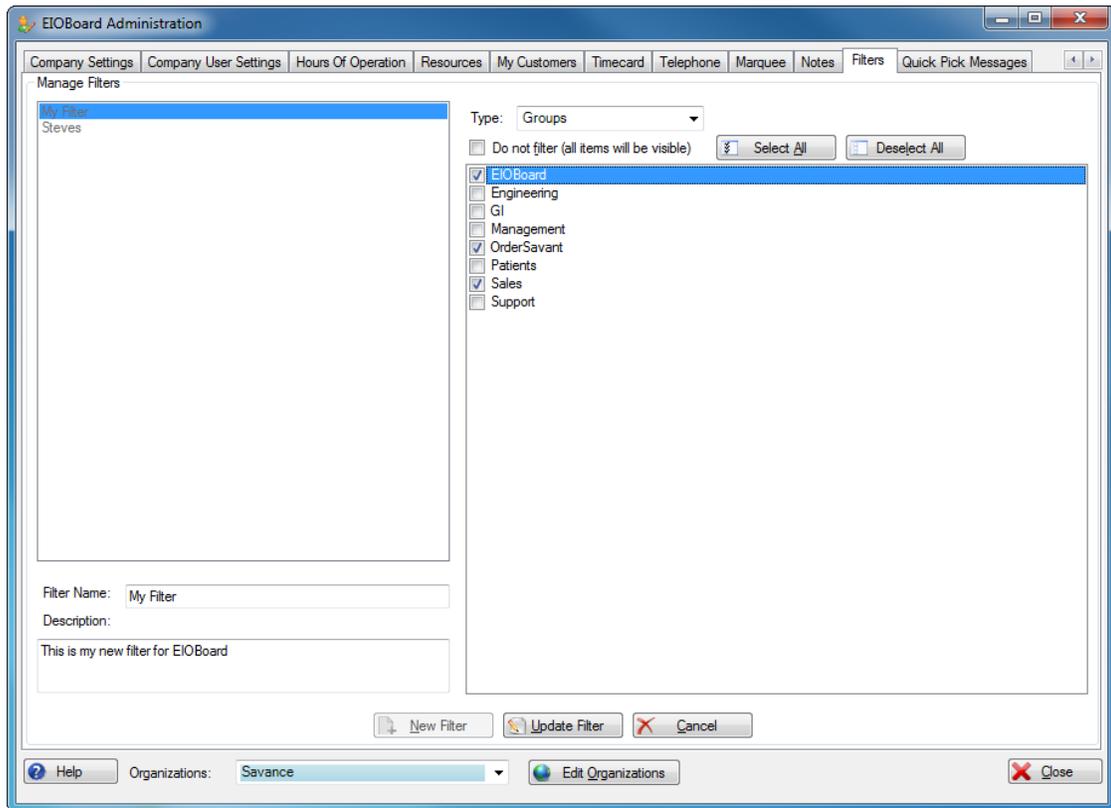
- ✓ **Custom Field Options:** For custom fields of type "Option", this will limit the available options for the selected filter
- ✓ **Custom Fields:** Hide columns that can normally be viewed from the status board, such as "User Name" and "Cell Phone Number"
- ✓ **Customers:** Hide customers so that users cannot associate their statuses with these customers (if your company uses the My Customers feature)
- ✓ **Groups:** Hide specific Groups from being viewed on the main status board
- ✓ **Locations:** Hide certain Locations so that users cannot associate their status with these locations as well as limiting the available Locations in the Search filter
- ✓ **Note Options:** Hide options when users are sending While You Were Out (WYWO) notes, such as "Called to see you" and "Urgent"
- ✓ **Resource Types:** Hide entire groups of resources, such as "Conference Rooms" or "Projectors"
- ✓ **Resources:** Hide specific resources, such as "Conference Room A-14" or "Projector 4"
- ✓ **Statuses:** Hide statuses so that they do not show in the Status Update screen or any other status-related lists



## Getting Started



1. As an EIOBoard Administrator, click on **Administrator** in the toolbar to open up the **Administrator** window.
2. Go to the **Filters** tab.



3. To create a new Filter, click on **New Filter**. Type in a unique name for your filter, and give it a description if necessary. Then click **Add Filter**.
4. Now you need to configure your new filter. Select your filter and click **Edit Filter**.
5. To hide certain information for this filter, simply select a **Type** from the drop-down menu.
6. To choose what items to filter, be sure to uncheck **Do not filter (all items will be visible)**.
7. Now, you can select which items to filter out for each type by unchecking any item you would like to hide.

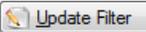


## Filters

Type: Groups

Do not filter (all items will be visible)

- EIOBoard
- Engineering
- GI
- Management
- OrderSavant
- Patients
- Sales
- Support

- For example, in the picture above, all Group tabs other than “EIOBoard”, “OrderSavant”, and “Sales” will be hidden from the status board of any user that is using this filter.
- Once you have finished configuring your filter, click .
-  In order for a user to apply the filter to his/her EIOBoard, the user must click  in the EIOBoard toolbar and select a filter. You may also do this from the Update Status screen.

Filter: My Filter

Location: <All>

Status Type: <All>

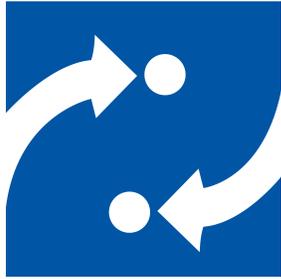
Status: <All>

Name:

Ext:

Within Selected Group

- Once the user selects a filter, it will be applied to his/her status board, filtering out all features and information that does not apply to this user.



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**Thank you for choosing Savance!**

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