STARTING WITH VIADESK

VIADESK

This Viadesk factsheet summarises the available features and possibilities. It will help you take the first steps towards effective use of Viadesk!

THE BENEFITS OF VIADESK

All our customers use Viadesk in their own individual way. What they all experience, however, are the benefits of a flexible central workspace that is always available, wherever they are:

- Collaborating from any location
- Project support
- An overview of everything that is going on or is in the pipeline (lists of activities, appointments and events)
- Knowledge becomes available via documents and experts.

When Viadesk is used as communication platform, information is no longer scattered. The latest information is always accessible to everyone involved. The number of emails can be reduced when everything is centralised into one location.

TEAM COLLABORATION IN PRIVATE GROUPS

Viadesk offers a secured environment for collaboration. Within this environment it is possible to collaborate – e.g. on a specific project – in separate private **Groups** with a selection of users.

SECURITY LEVELS AND PERMISSIONS

There are several security levels in Viadesk:

- The webmaster can add users and s/he determines the settings of the work environment.
- The manager determines the settings of a group (he has access to the **Management link** in the group menu).
- Participants must explicitly be given access to a group. There are several levels: read-only, add, edit, and manage. These levels can be set down to folder or even item level.

MEETING POINT FOR EVERYBODY

Home is the first page you reach after log-in. This page can be used as the (group) meeting point for everyone. Depending on his or her permissions, each participant may add information here that is relevant to everyone. The page also offers a personalised summary of the **Recent changes** of all groups to which the user has access. This is the location from which you click on to your project or expert group. The screen can be divided in the following elements:

- Navigation
- Important buttons
- Recent changes
- Group related items
- Group menu

All highlighted elements in the screenshot below will be discussed on the following pages.

NAVIGATION

You will find the main navigation at the top of the screen. You can use this to navigate between **Home** and **Groups.**

Home: quickly navigate to **Home.**

Groups: easily navigate between groups.

Setup: this link is shown to webmasters only.

Breadcrumbs: shows where you are in the application.

Group name: gives the name of the group.

My notifications: keeps you informed about the latest changes in Viadesk.

My account: here you can set your personal preferences and edit your contact details, profile, picture and password.

Logout: log out with one click.

Help: via this link you'll go to the Viadesk support site.

Search: type a keyword and a new page will display your search results.

NEW CHANGES

On the **Startpage** you will find new changes in Viadesk.

Recent changes: a personalised summary of all latest changes to which you have access. On **Home** you see all changes from all **Groups** you are member of.

IMPORTANT BUTTONS

Depending on the page you are viewing and the permissions you have, you will see these buttons:

Add: here you find a range of options to add information. eg: **File** allows you to add any kind of file – Word, PDF or image – to Viadesk.

Actions: lists all editing activities for the page in question. The available activities depend on the page and on your rights.
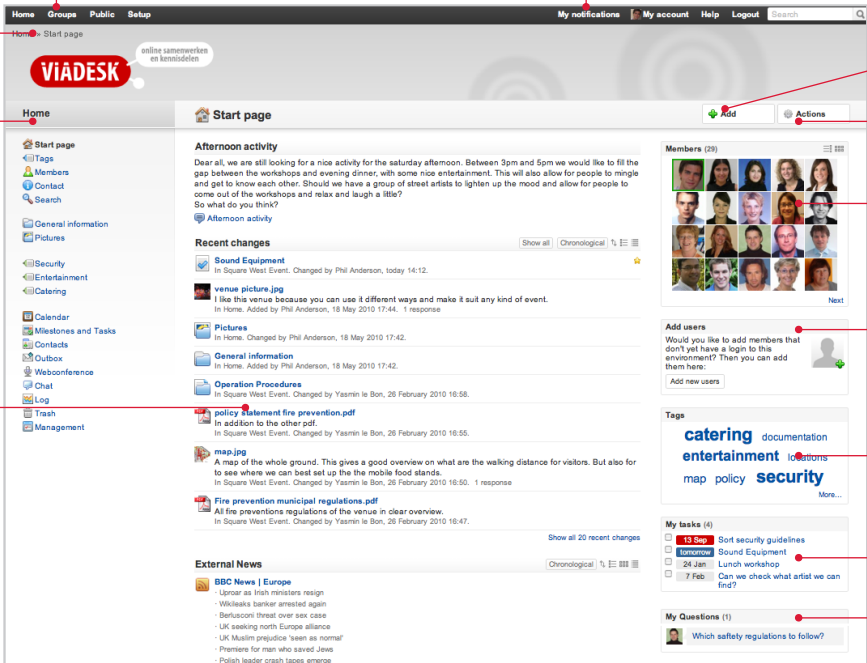
GROUP RELATED ITEMS

My groups: shows all groups you are member of. The **Groups** link in the main menu allows you to navigate easily between groups.

Members: lists the people with whom you collaborate.

Tagcloud: the tagcloud shows you the most important tags.

My tasks: an overview of personal tasks per group.
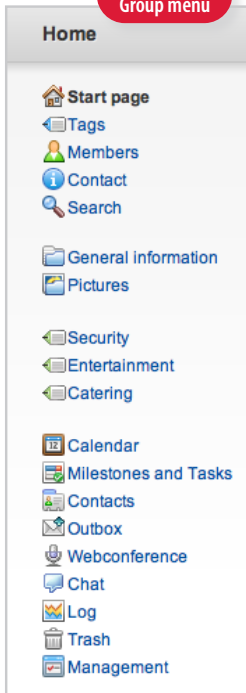
My questions: an overview of the questions asked to you.

Home, Groups, Setup

My notifications, My account, Logout, Help, Search

Crumbs path

Add

Actions

Group name

Members

My groups

Recent changes

Tagcloud

My tasks

My questions

Home

🏠 **Start page**
◀ Tags
👤 Members
ℹ Contact
🔍 Search

📁 General information
🖼 Pictures

◀ Security
◀ Entertainment
◀ Catering

📅 Calendar
📋 Milestones and Tasks
👥 Contacts
✉ Outbox
🎤 Webconference
💬 Chat
📧 Log
🗑 Trash
🖥 Management

GROUP MENU

Under the group name you will see the the group menu containing the elements*: Startpage, Tags, Members and Search. Next are the Folders and Tools* of the group: Calendar, Milestones and tasks, Contacts, Inbox, Outbox, Chat, Logbook, Trash and (optional) Management.

*Only available when offered by the group manager. The availability and names of these Tools can be set by the group manager via **Management > Menu.***

○ **Startpage:** lists the activities of the group. General messages can be posted here, and also recent changes and group members are shown here.

○ **Tags:** automatically collates all information sorted by labels and tags. **Home** shows information from all groups.

○ **Members:** here you find all group members – **Home** gives all **Members.** You can search from here for contact and profile details.

○ **Search:** gives access to an advanced search screen. Searching from the main menu is also possible. To refine your search results click advanced search.

○ **Folders:** enables you to group information together and are created via **Add.**

○ **Calendar:** shows the appointments in the group.

○ **Milestones and tasks** gives an overview of the project progress.

○ **Contacts:** lists of all group contacts. Email addresses are accessible, which also allows you to send mailings to external contacts.

○ **Inbox:** here all group email is received and saved. Using this shared email address keeps all group members informed of external communication.

○ **Outbox:** sent emails are stored here.

○ **Chat:** for direct contact, use this feature to start a chat session with online members in the chat room. The chat can be saved.

○ **Log:** gives an extended insight into the group activity. It helps managers and webmasters with user analyses.

○ **Trash:** items will not be deleted immediately, but are moved to the trash. Removing items from the trash will permanently delete them.

○ **Management:** accessible to group managers and web masters only.

ADD

There are several ways to add information:

○ **File:** Use this option to add any kind of file. If you are collaborating on files, please check the possibility of version management. Add comments to a document in a reaction and keep all information together in this way.

➕ **Add**

📁 Folder
📄 File
📝 Text
🗜 Zip

📣 Message
📰 News
📡 RSS Feed

❓ Question
💬 Discussion
📊 Poll
📋 Survey

✉ Email
📅 Appointment
✔ Task
👥 Contact

🌐 Bookmark
📝 Blog

📋 From clipboard

○ **Text:** texts may also be added directly as a note in Viadesk. The text is now immediately visible on screen. Below it, people can react.

○ **Message**: for a temporary (urgent) message that can be removed later.

○ **News:** for other messages, facts and details, and informative matters.

○ **Question/Discussion:** rather than email, use this option to pose a question or a statement to the group. When a question is asked, an email notification is sent as well.

○ **Poll:** for a quick overview of what is topical to the group or what the general opinion of the group is also sent.

○ **Survey:** feature to conduct a more extensive research; can also be used for simple registration or completion forms.
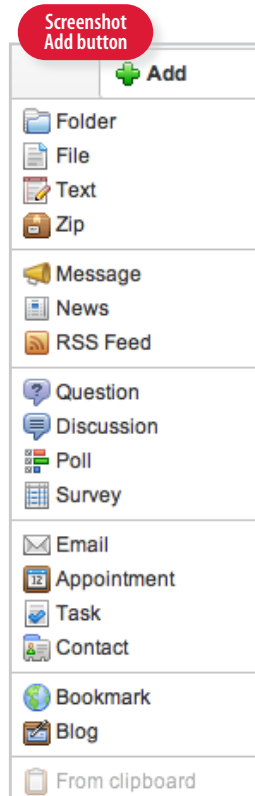
○ **Email:** well-known application. It is convenient to email external parties from here – all communication can now be read by all group members.

○ **Appointment:** plan appointments in the central calendar.

○ **Task:** specify action points for yourself and others.

○ **Contact:** share the contact data of external relations with one another.

○ **Bookmark:** for interesting links to external websites.

○ **Blog:** with this feature you can create a blog.

VIADESK

WHERE TO PUT INFORMATION

Whenever you add information, it is recommended that you consider the location where you add it. If the information is interesting to everybody, you may want to put it on **Home.** If it belongs to a specific project, it is recommended to add it in the group of the project itself. When you add something please bear in mind the overview – particularly when you add a lot of information. You may want to consider putting your information in a folder.

ATTENTION TO YOUR CONTRIBUTION

If you want to increase the exposure of your contribution, e.g. because it is important that participants read it and react to it:

- Manually notify the people involved by email (via **Actions**).
- Ask a question. This will immediately generate a notification with a request for a reaction.
- Add an (eye-catching) announcement of your contribution.

SEARCH & FIND

Open up information by topic by adding tags to your information (provided this feature has been made available by the webmaster). This metadata adds labels to your contribution. The **Tags** functionality automatically and dynamically classifies by tag. This eases retrieval of your contribution and other information on a particular subject.

Nothing beats a powerful search feature! The search option searches down to text level in a document. If the search results are too extensive, you can refine your search criteria by type, e.g. PDF file or appointment. You do not have to know in which group something is stored. If you search from **Home** you will search in all groups.

HELP

Do you have a question or is there something you can not find or do not understand? You can always turn to the online Help. It will describe in detail how you can add for example an announcement, a document or a poll. The Help feature has an internal search functionality – searching on for example announcement, document or poll will give you the relevant results. If this does not solve your problem, please contact your webmaster.

MANAGER AND MANAGEMENT

The manager can adjust the settings of the specific group via **Management.**

- **Name:** adjust the group name, group description and category.
- **Members and permissions:** add new members and set permissions.
- **Design:** a webmaster (not a manager) can set the group design.
- **Menu:** elements of the group menu can be hidden/unhidden or renamed here.
- **Applications**: the options offered under **Add** can be adjusted here.
- **Tags:** a shortcut can be added to the menu for important group Tags. This links to the relevant pages in **Tags,** allowing information and experts on this tag to be easily accessible.
- **Startpage:** the detail or list view of **Startpage** content can be chosen here (informative vs compact).
- **Reports and Recent changes:** select which changes should be reported as new item on the startpage or in the email report.
- **Export:** when you want to remove the group, shared documents can be downloaded as a Zip-file here.

ABOUT VIADESK

Viadesk is the expert in online collaboration and knowledge sharing. Our platform facilitates every conceivable form of web collaboration between people, departments, and organisations. Viadesk enables you to design your own web environment for intranet, your knowledge network, a project environment or a professional community.

Viadesk is more than just a product: The people behind our extensive and user-friendly product are very happy to advise you about the preconditions and the implementation of online collaboration and knowledge sharing.

WWW.VIADESK.NL