

# Starting with Viadesk



This Viadesk fact sheet summarizes the available features and possibilities. It will help you to take the first steps towards effective application 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 location that is always available, wherever they are:

- ✓ Collaborating from any location
- ✓ Project support
- ✓ An overview of everything that is going on in the pipeline (lists of activities, appointments and events)

When Viadesk is used as the communication platform, information is no longer scattered. The latest information is always accessible to everyone involved – and no longer scattered across several emails. The numbers of emails can be reduced when everything is centralized in 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.

## 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.

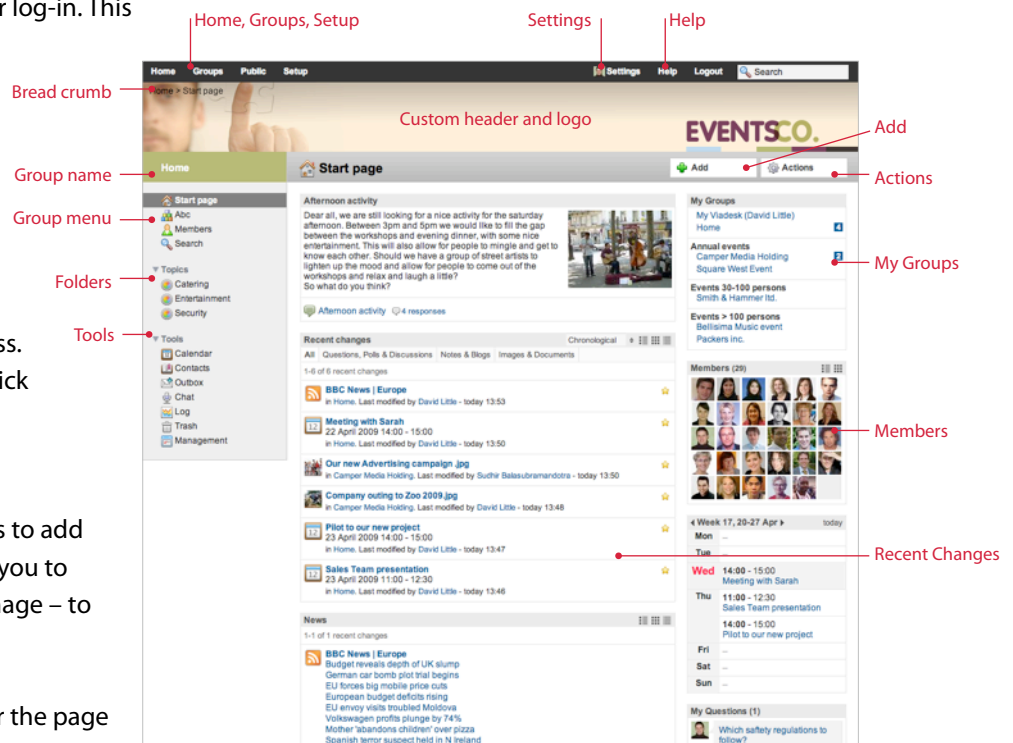
Depending on his or her permissions, each participant may add information here that is relevant to everyone. The page also offers a personalized summary of the **Recent changes** of all groups to which the user has access. This is the location from which you click on to your project or expert group.

## Description of the window

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

**Activities** lists all editing activities for the page in question. The available activities depend on the page and on your rights

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





**Members** lists the people with whom you collaborate.

**Recent changes** provides a summary of all changes to which you have access.

Your actual location in the application is indicated in the **breadcrumb navigation** and shown in **Home** or the **group name**.

The main navigation is in the top of the window. Use it to navigate quickly to **Home**, between **Groups** or your **Personal settings** such as password and profile. The online **Help** offers an extensive explanation of the application and its features.

**Group menu:** The group menu is under the group name. If available, its default options are: **Startpage, Abc, Members** and **Search**. If available, the group folders and group **Tools** are **Calendar, Contacts, Inbox, Outbox, Chat, Log, Trash** and (in some cases) **Management**.

### 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 possibilities of version management. This feature saves old versions and allows users to retrieve files to see when what changes were made. Add a comment to document in a reaction and keep all information together in this way.
- › **Note:** (short) 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 put 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.
- › **Survey:** easy 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 up action points for yourself and others.
- › **Contact:** share the contact data of external relations with one another.
- › **Bookmark:** for interesting links to external websites.

### 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 the overview in mind – particularly when you add lots 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

When information is stored logically, accessibility and proper overview go hand in hand. Open up information by topic by adding tags and topics to your information (provided this feature has been made available by the webmaster). These so-called metadata add labels to your contribution. The **Abc** functionality automatically and dynamically classifies by topic. 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.

## 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** de link in the group menu).

Participants must explicitly be given access to a group. There are several levels: visitors (read-only), add, edit, and manage. These levels can be set down to folder or even item level.

## Help

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