Opendesk

Opendesk Feature Guide

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1. Introduction

Congratulations on choosing **Opendesk!** This manual will provide a description of the entire product, as well as marketing collateral to assist you in your sales efforts.

1.1 What is Opendesk?

Opendesk provides integrated Intranet, Groupware and CRM applications within a secure, online "command center" for small businesses and workgroups. Clients access Opendesk tools from their Web browser, personal digital assistant (PDA) or Wireless Application Protocol (WAP) capable wireless device. Opendesk also provides advanced service provider tools designed to make it easy to deploy and administer the Opendesk application. Within an integrated Web-based management console, administrators can provision applications, configure Opendesk's default settings, provide customer service and visually analyze end user adoption and use of VL HQ applications.
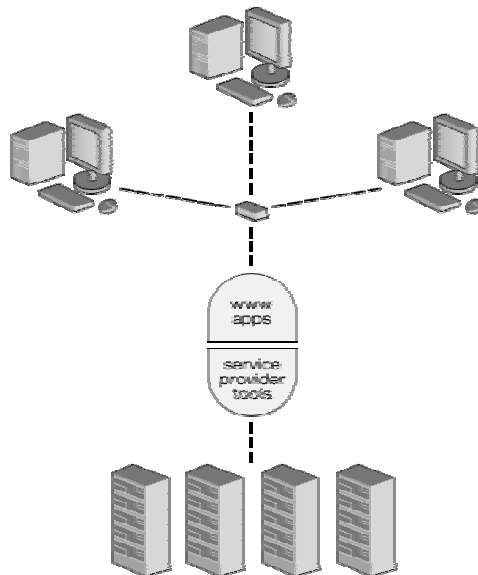
1.2 Overview: End-User Applications

Opendesk offers the end-user a wide range of web-based applications, to promote communication and collaboration and to streamline business processes:

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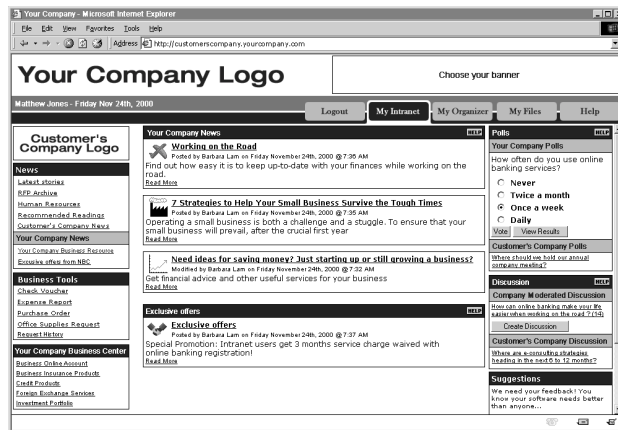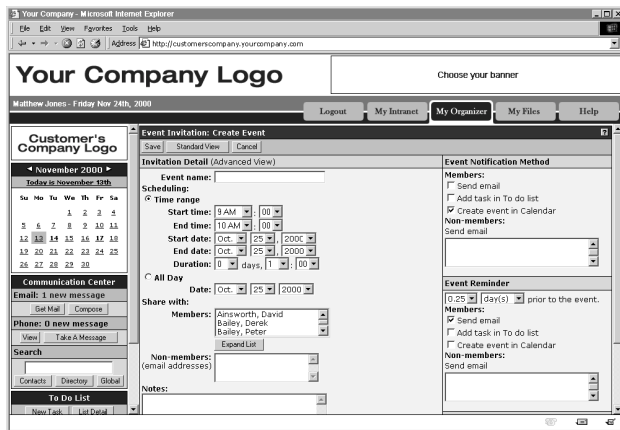
Calendar: The Calendar functions as both a personal and group calendar in which users can add, edit, delete and share events. It includes a daily, weekly, monthly, and yearly view. The Calendar supports email notifications, repeating events and multiple time zones.

Email: The Email application has the following capabilities: sending and receiving email messages (including carbon copies) and attachments, saving unsent drafts, saving messages to folders, adding personal signatures, and fetching external POP account messages. The Email application links directly to the Contacts application for retrieving addresses and sending group emails.

File Manager: The Files application is used to save and share files. Private and shared folders can be created and files can be uploaded from the user's hard drive or copied from email attachments.

Contacts: The Contacts application is used to store contacts, organize contact information into categories, and send email to individuals or groups and track contact history. The Contacts application also gives access to the Company Directory, and includes a search engine. Contacts can be private or shared among users.

User Preferences: The User Preferences application allows end users to view and change preferences for their calendar, email, personal information and password.

Phone Messages: The Phone Messages application allows users to take and retrieve telephone messages through the company Intranet and to add the caller to the Contacts application.

To Do: The To Do application is a task manager that is used to track and prioritize tasks. Applications such as the Calendar and Business Tools automatically create entries in the To Do application.

Bookmarks: The Bookmarks application stores important Web site URLs. This application is used to add, edit, and delete URLs and organize them into categories. Bookmarks can be private or shared among users. This application can import Internet Explorer and Netscape bookmark files.

Scratch Pad: This application serves as an electronic notepad. It is used to write and retrieve short notes.

Global Search: The Global Search application is used to search for any information contained in the Intranet. A search can be specified by application, level of sharing (e.g. private or company-wide), and date.

News: The News application is a company-wide newsletter with multiple, user-created sections. Users publish news using simple Web-based content creation tools. Administrators can assign publishing rights to individual end users.

Polls: The Polls application allows users to create and participate in company-wide polls. It also automatically tabulates and displays poll results.

Real-Time Chat/ Instant Messaging: The Chat application is an instant messaging application. Any user logged in to the Intranet can see who is online and send short text messages to them. Users can also initiate group chats involving a number of people.

Group Discussions: The Group Discussions application is an online discussion group for posting messages and replies. The Group Discussions application supports threaded discussions as well as an unlimited number of simultaneous discussions.

Business Tools: The Business Tools application consists of work-related request forms that are automatically routed to administrative users. The tools automate the process of requesting and approving check vouchers, purchase orders, expense reports, office supply requests, and educational expenses. A detailed auditing and reporting system allows administrators to generate and print reports.

1.3 General Features

Complementary to the specific applications, the following are general features of Opendesk that are available to the end-user:

Help Files: Opendesk has a built-in Web-based online help system. Users access help by clicking the 'Help' button located at the top of every application.

PDA Synchronization (Microsoft Windows only):   Through the use of a downloadable synchronization client, users can synchronize their Opendesk data with Microsoft Outlook/Outlook Express, Lotus Organizer, ACT! and the Palm Pilot. Data can be synchronized with the Calendar, Contacts, and To Do List.

WAP Access: Users of WAP-enabled wireless devices, such as mobile phones, can directly access their To Do lists, Email Inbox, Calendar, Contacts and Bookmarks through WAP-enabled shortcuts.

Sharing: Many applications have the ability to share data. This means that data can be set as private, shared with one or more specific users, or shared with the entire company. This system of 'permissions' allows administrators and end users to control who has access to their information.

User Roles: There are four types of roles within the Intranet: the Creator manages all aspects of the Intranet. The Publisher has access to News, Polls and Group Discussion in the Admin tools. The Collaborator can created shared events, shared files, and shared contacts. The Viewer can access all applications but only at the personal level.

1.4 Service Provider Applications

Service providers that license Opendesk have access to a set of back-end tools that manage end-user accounts, broadcast content across all intranets, and monitor usage:

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Broadcast Tools allow service providers to push content directly into all end user Intranets. All broadcasted content can be branded (e.g. with the service provider's logo) to differentiate it from end-user-generated content.

- **Broadcast News**
- **Broadcast Polls**
- **Broadcast Discussions**

Customer Support Tools allow service providers to manage customer accounts and frequently requested information, such as forgotten passwords. Simple Web-based tools can complement a service provider's customer support applications:

Account Records: Support staff can quickly access full account information about each Intranet: Short Name, users, usernames, and file storage.

Password Reminders: Support staff can retrieve and replace passwords and the Password Reminder Question.

Usage Reporting Tools allow service providers to analyze and view usage patterns. Reports can be generated based on time ranges, and can be displayed as tables and multi-line graphs.

Sample reports: number of accounts, number of members, average members/account, rate of new accounts, most popular applications, logins per hour, logins per day, most/least active accounts, largest/smallest Intranets, as well as detailed application usage graphs for each Opendesk application.

2. Target Market

Because of its web-based technology platform, Opendesk is particularly appealing to companies with the following characteristics:

- Corporate headquarters with multiple franchises or divisions, e.g. restaurant chains
- Geographically dispersed and/or mobile workforce
- High speed Internet access
- Need real-time communication and file-sharing, over a secure network
- Need centralized management and monitoring of business processes
- Need web-based tools to broadcast content (late-breaking news, group discussions, company polls)

3. Detailed Feature Set

3.1 Section Overview

Opendesk is divided into 3 main sections:

- **Organizer**
- **Files**
- **News & Tools**

Each section contains a set of business applications that promote communication and collaboration and streamline business processes.

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3.2 Applications

Organizer contains the following applications:
- Calendar
- Contacts
- To do List
- Email
- Phone Messages
- Search
- Chat
- Bookmarks
- Scratch Pad
- User Preferences

News & Tools
- News
- Business Tools (Request forms + request history)
- Group Discussions
- Polls

Files
- File storage
- File sharing

WAP, PDA synch

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3.3 Functionality

Calendar

The Calendar is the default application in Organizer. The calendar lets users add, edit or delete events, and share events with others in the company Intranet. Users can also use advanced options to create repeat events, send reminders to themselves or others (by email, as a calendar entry, or a To Do task), or set time zone preferences for a specific event.

There are three types of events: Personal, Company-wide and Shared:
- **Personal**: A personal event is only displayed in the user's calendar.
- **Company-wide**: A company-wide event is displayed in everyone's calendar and can be viewed by all members of the company Intranet.
- **Shared**: A shared event is displayed in the calendars of the individuals the user selects.

Users can also browse their colleagues' calendars to check availability for scheduling. To preserve confidentiality, users can mark an event as *Confidential*, so other colleagues view a private event simply as a grayed-out area in the calendar labeled *Confidential*.

There is also a mini monthly calendar displayed in the top left corner of Organizer. Users can click on a date in the mini-calendar to instantly open the day view of the selected date in the main Calendar view. Users can also instantly open a view of the current day by clicking the **Today is** link in the mini calendar.

Contacts

In Contacts, users can store their contact information, organize it into categories, and send email to individuals or groups, and track contact history. Users can also share contact information with others in their company by giving others access to the category where contact information is saved.

All contacts must be saved to a category. Users decide which categories can be accessed by others and which are personal. The contacts list also contains the Company Directory, where users can retrieve the contact information of everyone in the company.

There are two default personal contact categories automatically created: Help and Unfiled.

- The **Help** category contains email addresses to Opendesk. Should you need to contact Opendesk for more specific help, or for other information, click on one of the provided email address and send us an email.
- The **Unfiled** category contains contacts that are not saved to a specific category. If you delete a category that contains contacts, the system automatically moves the information to the Unfiled category.

To do List

The To do List helps users centralize and prioritize pending tasks. There are two types of tasks in the To Do List: personal tasks and company tasks.

Personal tasks are tasks users assign to themselves using the To Do List application in Organizer. Users can view their personal tasks by clicking on the **My tasks** link in the To do List. This expands the To Do List and displays any pending personal tasks the user may have.

Company tasks are tasks that others in the company Intranet assign to a user. This will involve

processing or approving back office forms, such as check vouchers, expense reports, or purchase orders. Company tasks may also be drafts of request forms that a user has started, but has yet to complete. Company tasks depend on the role and responsibilities the user has within the company.

Email

The email application lets users send and receive email messages, save messages to folders, sort messages, send and receive attachments, save unsent drafts, and specify personal email preferences, including POP accounts.

Each member of the Intranet has a personal email address that combines the username and the company Intranet address. E.g. *username@ShortName.Opendesk.com*.

Each Intranet account also has a company-wide email address that consists of the company Intranet address (E.g. *ShortName@ShortName.Opendesk.com*). This is a company-wide email address that goes to everyone in the company Intranet.

Phone Messages

The Phone Message application lets users send and receive phone messages through the company Intranet. Users can view how many new phone messages they have in the Communication Center, in Organizer.

Search

The Search application lets users search keywords in almost any application in the company Intranet. Search is located in the Communication Center, in Organizer. Users can also directly search the Contact List or Company Directory to retrieve contact information quickly and easily.

Chat

The Chat application lets users communicate with colleagues in real time. Users can participate in a private chat with an individual or group, join a company-wide chat, or send and receive instant messages. There is a 400-character limit per message.

Bookmarks

The Bookmarks application lets users save the URLs (web addresses) of their favorite websites, organize them into categories and sort them for display.

Scratch Pad

The Scratch Pad application is like a note pad. Users can use it to make quick notes, jot down phone numbers and addresses, and save them for future reference.

User Preferences

User Preferences centralizes the personal options for various applications. User Preferences is divided into four sections:
1. Account Information: Users can edit their name, username, or password. They can also review the amount of storage space they are using in email and My Files.
2. Calendar: users can set their personal Intranet clock to the time zone that best suits their location.

3. Email: Users can create a personal signature, indicate message display preferences, set automatic attachment forwarding, or create a POP account (Post Office Protocol – lets users pool their emails from other services into one centralized location).
4. Chat: users can select the auto-launch-on-login option.

News & Tools

News

The News application keeps users keep up-to-date on company news and events. Users with publishing status can create stories and save them in news sections that are organized by topic, department, product, project, or however they decide.

There are two default news sections:

- **Latest Stories**
  Latest Stories is the default news section. It is displayed in the center frame of My Intranet. Latest Stories is a compilation of the 10 latest news stories posted to the news application. Stories posted here can also be found in the sections in which they were originally posted.
- **Opendesk News**
  Opendesk News is published by Opendesk administrators. It contains news and updates concerning Opendesk.

Business Tools

Business Tools is a built-in workflow system for back office processes. The system automates the process of requesting and approving check vouchers, expense reports, purchase orders, office supply requests

and educational expenses.

Using simple request forms, users can submit a request automatically to a manager's To Do List for approval or processing. The system is designed to be flexible, and can adapt to as many levels of approval as a company requires.

All request forms that have been submitted, approved, rejected or archived can be retrieved in the Request History feature, which tracks all request forms handled in the Intranet.

Group Discussions

The Group Discussions application lets users discuss issues and post replies in threaded discussions in My Intranet. Users with publishing privileges can create new threads. Opendesk administrators may also create discussions and post them in the Opendesk Discussions section, directly below Group Discussions.

Polls

The Polls application lets users cast votes and view results, and lets managers get consensus. Users with publishing privileges can create new polls in My Intranet. Several polls can be published simultaneously, with the most recently published fully displayed, and with previously published polls one click away. Opendesk administrators may also create polls are publish them in the Opendesk Polls section, directly below Polls.

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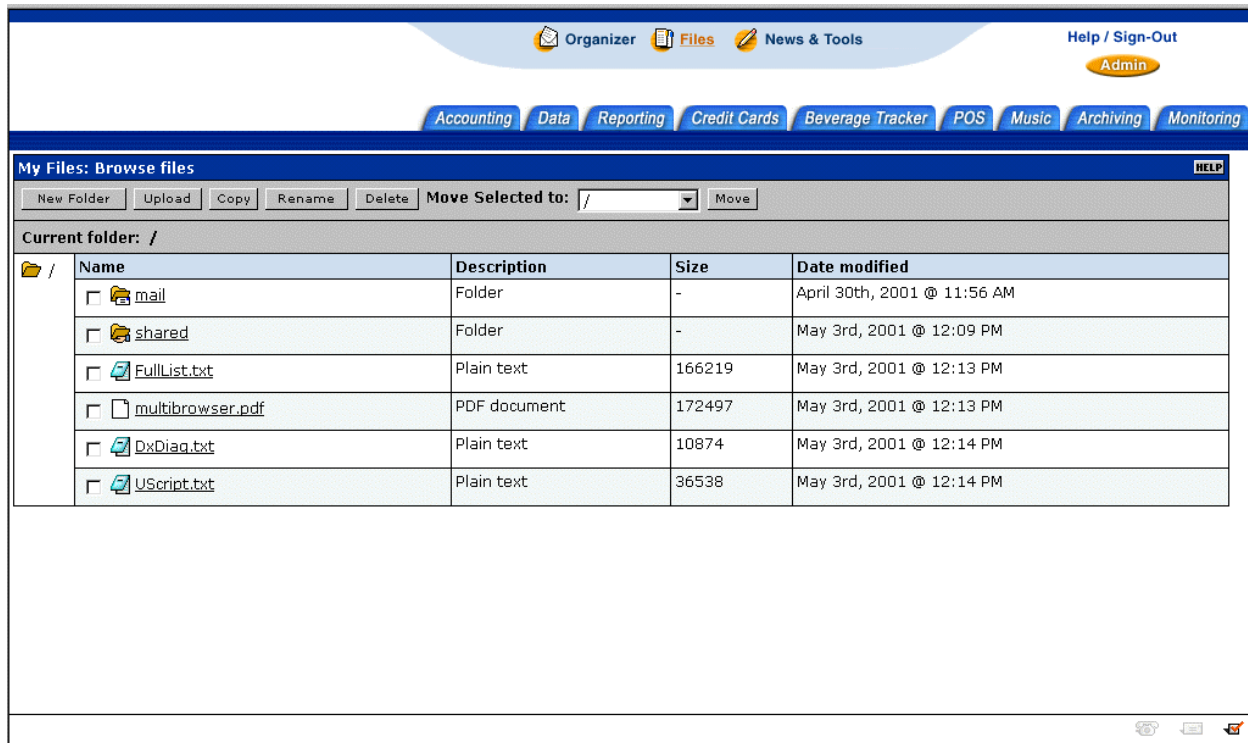
Files

My Files lets users save and share files in one central location. Users can upload and download files, create new folders, and copy, rename, and move files and sub-folders. Files stored in My Files are organized in a hierarchy of folders. A top-level (or, "root level") folder contains all files and sub-folders owned by a user.

Users navigate up and down the folder hierarchy by clicking on the folder names to dig down and display the files and sub-folders contained within. They can navigate up the hierarchy by clicking on the arrow icon in the top left corner of the folder list.

Every user has two default folders: Mail and Shared. The Mail folder is connected to the email application. It contains any email attachments a user decides to save, as well as the user's email signature, if there is one. The Shared folder is a company-wide folder that everyone in the company Intranet can access.

File sharing is done on a per folder basis (and not a per file basis). To share a file, users must save the file in a sub-folder within the Shared folder.

WAP/PDA synch

The WAP (Wireless Application Protocol) feature lets users with Internet-enabled cell phones access their most important information wherever they happen to be. The WAP-enabled Opendesk applications include the Calendar, Email, Contacts, Phone Messages and To Do List.
- Calendar – view today's events, view event detail, navigate forward and back
- Email – view Inbox, open messages, navigate among email folders, delete messages.

- Contacts – access personal or shared contact information, automatically call a contact from your cell phone.
- Phone Messages – View list of new phone messages, open and read messages.
- To Do List – View list of pending tasks, open and read tasks, delete tasks.

The downloadable PDA synch software allows you to synchronize calendar events, contacts and To Do List items with your Palm OS handheld unit or Windows CE device. It also allows you to synch with local clients, such as MS Outlook, Outlook Express, and Lotus Organizer.

3.4 Roles & permissions

There are four different user roles in Opendesk. The role determines which applications are accessible to the user. The creator of the Company Intranet has access to all Opendesk applications.

- **Viewer:** a user who can view items (e.g. calendar events, To Do) but cannot share them with others
- **Collaborator:** same as viewer, but also can share items in 'Organizer' (contacts, calendar, To Do) and files
- **Publisher:** same as collaborator, but also can publish content in 'News & Tools'
- **Creator:** same as publisher, but also has access to backend console

Intranet Administration / Administration Tools

Creators manage all aspects of the Company Intranet. They create and manage the account, create and manage users, and manage the applications.

Creators can also assign publishing privileges to users. Users with publishing privileges, or Publishers, have administrative privileges over company-wide applications. There can be more than one Publisher per account, and they can administer more than one application. Publishers however only administer applications; they do **not** have administrative privileges over other users.

- Create Publishers
- Create Creators
- Change registration code
- Set default permissions
- Change user passwords
- Invite new users
- Remove users
- Set company information
- Time zone
- Forced SSL
- View Storage space

3.5 Security

Opendesk accounts are password protected. Users choose a password when they register. Passwords are authenticated through a "challenge-response" using keyed MD5 algorithm through javascript.

Secure Sockets Layer (SSL) over http is also available as an option to end-users. Intranet administrators (CR) may also set SSL as a default for all users of the Intranet.

Logcheck parses logs and sends an email to the administrator (CR) if it identifies a security problem.

4. Benefits

Your end users (e.g. head office, franchise owners, managers, employees) will save time, money, and enjoy convenient global access to the tools they use to manage and monitor their business. With Opendesk, your customers will:

Have anywhere, anytime access to their software and files

No matter where they are or what device they're using, users can access their files, contacts and email with a current Web browser like MS Internet Explorer or Netscape Communicator.

Be able to use sophisticated groupware, effortlessly

Thanks to the clean and intuitive user interface, no technical expertise is necessary for a franchise owner or manager to use Opendesk. VL HQ has sophisticated functionality that is easy to use and simple to manage.

Reduce the hassle of software installation and upgrades

There is no software to install on local PC's, and software upgrades are done centrally on the hosting servers.

Stop juggling software licenses

Keeping track of who is licensed to use which software package can be a hassle for administrators. When you license Opendesk, you will be able to access all applications via a single interface.

Dedicate fewer resources to managing in-house software

Since Opendesk provides all your communication, collaboration and monitoring tools, you will be able to focus your time and resources on core business activities, rather than diverting excess resources to managing technology.

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Appendix I. Opendesk End-User Testimonials

"Everybody loves what you're doing so far so keep up the enhancements." - Byron K. Ford

"The best intranet I've seen so far" - "Frankstm"

"I really love your service." - Ingo Heuschkel

"Thanks for a very efficient and easy to use service." - Konrad Andrews

"I think the entire concept of your site & service is fantastic." - Mark LaPore

"I'd like congratulate Opendesk for this Intranet service. I've tried other services like web-mail or web-hard drive but I always had to go to different sites. In Opendesk I have an all-in-one solution and it's fast and reliable. It's just amazing." - Ricardo Reboucas, system analyst

"The sharing capability will enable much greater communication between our group. Much appreciated!" - Andrew Harding

"I think this is a beautiful UI." - anomalogue@hotmail.com

"Our experience with Opendesk.com has been overwhelmingly positive. Because many of our personnel are working on several projects at once and are in different locations, communication among our people is essential. Your product has allowed our company to communicate efficiently and effectively with ease, for free. What used to require a phone call or visit can now be accomplished on Opendesk in a moment. Perhaps most important, new ideas that might have been forgotten or ignored can be posted on Opendesk, contemplated, discussed, and stored. Finally, it was a pleasure to use your help service phone number and find a human being on the other end of the line who is committed to providing great service." -Dan O'Reilly Chicago, IL

"First, let me say I am more impressed with your site by the minute (I am a first-day user). You guys have done a great job...The site is well-designed, extremely quick on most connections and browsers, and has numerous little "niceties" which make it better than any other groupware site out there (and I've tried most of them). I greatly respect Opendesk's commitment to open source, their web-widget architecture, and their decision to base the site on open technology." -Tim Mikesell, Alaska

"Excellent experience - Opendesk.com must be one of the best services around of its kind." – Jon London, England

"I just love this application... now that I have been using it I can't seem to use anything else! Forget about my Outlook and contact managers! This is everything I need.... KUDOS TO ALL OF YOU, and thanks for the quick support. You guys are to be commended." -Rob Blanda, Visual Designer

"Thanks so much for your product. It's already increasing our productivity."- Nev Douglas, New York, NY

"Congratulations to your design and programming team. You are providing a great service with a fantastic and extremely promising product." - Juan R. Duarte

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Appendix II. A Service Provider's Testimonial

vFirm

vFirm provides a suite of web-based applications targeting small professional firms, including legal, accounting, financial services and consulting firms. The company needed an ASP platform that would be powerful enough to provide all the core tools of its ***vWebTop*** service while being flexible enough to integrate with other best-of-breed ASPs.

"Access to applications and data is mission critical for professional services firms. Opendesk is built on robust, scalable technology and the product's open architecture guarantees that we can extend and enhance ***vWebTop*** in the future." - **Clyde Kunst, Chief Technology Officer**

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Appendix III. Fact Sheet

Opendesk

End-User Applications

- Calendar
- Email
- File Manager
- Contacts
- User Preferences
- Phone Messages
- To Do
- Bookmarks
- Scratch Pad
- Global Search
- News
- Polls
- Instant Messaging
- Group Discussions
- Business Tools

General Features

- Help Files
- PDA Synchronization
- WAP Access
- Sharing
- User Roles

Service Provider Applications

- Broadcast News
- Broadcast Polls
- Broadcast Discussions
- Broadcast Files
- Broadcast Events
- Broadcast Contacts
- Broadcast Emails
- Broadcast Links
- Customer Support Tools
- Usage Reporting Tools

Interface Options

Microsoft Internet Explorer (4.x and higher), Netscape Communicator (4.x and higher),
WAP browser, Palm OS compatible devices (Internet synch), Pocket PC compatible devices (Internet synch)