

KAVI[®] WORKSPACE
USER GUIDE

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My Account

How do I log in to Workspace?

Your administrator will do one of the following:

Your administrator provided you with a URL, username and password:

1. go to the URL and click the 'Login' link in the upper right corner of the page
2. Enter the username and password provided to you by your administrator
3. Click the 'Login' Button

Your administrator sent you an email containing a link:

1. Follow the link from the email
2. You can keep the suggested username or change the 'Username' field to something you prefer, just be sure to remember it
3. Enter what you want as a password for both 'Password' fields. It must be between 6 and 25 characters long and cannot use these characters: # @ ? | /
4. Click the 'Save and Proceed to Login >>' button
5. Enter the username and password you created
6. Click the 'Login' button

How do I log out of Workspace to prevent other users of a shared computer from accessing my account?

1. Move your pointer over the user icon to the right of your name in the upper right to expose the user menu
2. Click the 'Logout' link

How do I get help?

If you need assistance with a topic that is not covered in this help documentation, please contact your Organization Administrator.

Groups

How do I find and access group content and information?

To access a specific group you're a member of:

1. Move your pointer over 'MEMBERS' below the organization name to access the members menu
2. From the 'MY GROUPS' section, click the name of the group you wish to access

To access a specific group you're not a member of:

1. Move your pointer over 'MEMBERS' below the organization name to access the members menu
2. From the 'GROUPS' section, click 'ALL GROUPS'
3. Click the name of the group you wish to access

To access combined information for all the groups you're a member of:

1. Move your pointer over 'MEMBERS' below the organization name to access the members menu
2. From the 'GROUPS' section, click 'MY GROUPS'

Ballots

How do I vote on a ballot?

Note: You must have the correct role and privileges in a group to vote on a ballot.

From the ballots page:

1. Either click the ballot name or click the 'OPEN' button from the 'Status' column for the ballot you wish to vote
2. Read all ballot information
3. Enter all necessary information including your option(s) and comment(s) (if available)
4. Click the 'CAST VOTE' button

Documents

How do I post, upload or add a document to a group?

Note: You must have the correct role and privileges in a group to add a document.

From the group home page:

1. Click the 'Add a Document' link, located to the right of the group info at the top of the page
2. Complete the form
3. Click the 'Add Document' button at the bottom of the page

From the documents page:

1. Click the 'add document' link, located above the list of folders on the left side of the page
2. Complete the form
3. Click the 'Add Document' button at the bottom of the page

How do I download a document?

From the documents page:

1. To download a single document:
2. Click the document name link, your browser will begin to download the document
3. If the document is displayed in your browser, use the browser's 'Save As' option to save the document to your computer

To download multiple documents:

1. Mark the checkboxes next to the documents you wish to download
2. Select 'Download' from the 'Bulk Actions' dropdown at the top of the document list
3. Click the 'Apply Action' button, the selected documents will be downloaded in a .zip file

How do I view document details and/or comments?

From the documents page:

1. Click the down arrow icon in the 'Actions' column of the document you wish to view to expose the action menu
2. Click the 'Details' option to go to the document details page

Calendar

How do I post or add an event to a group calendar?

Note: You must have the correct role and privileges in a group to add a calendar event.

From the group home page:

1. Click the 'Add Event' link, located to the right of the group info at the top of the page
2. Complete the form
3. Click the 'Add New Event' button

From the calendar page:

1. Click the 'add new event' link, located between the group name and the calendar
2. Complete the form
3. Click the 'Add New Event' button

How do I subscribe to a group calendar?

From the calendar page:

1. Click the 'subscribe to icalendar' link, located between the group name and the calendar
2. Your browser may ask for permission to open your calendar application (Outlook, iCal, etc...), allow it to do so

What is included in a calendar file or subscription?

The information contained in an iCalendar or .ics file depends on how you receive it. If an event is emailed to you as an attachment to a meeting notice, or you download the iCalendar file from an individual event, you receive the following information:

- name
- location (if provided)
- date and time
- frequency
- description (if provided)
- agenda (if provided)
- submitter
- group
- event URL (not available in Outlook)
- a message alarm 15 minutes prior to start of event

If you subscribe to the calendar itself, you receive all the information above as well as:

- every event scheduled, regardless of the month view
- action items and ballots, included as ToDos (Outlook does not support this functionality)
- shared events

See this Support Announcements forum post for [more information about subscribing to calendars](#).

Comments

How do I post or add a comment to a document?

Note: You must have the correct role and privileges in a group to add a comment.

From the document details page:

1. Click the 'add a comment' link, located between the group name and the document details
2. Complete the form
3. Click the 'Save and Add Another' or 'Save' button

From the documents open for comment page:

1. Click the 'add comment' link directly below the document you wish to comment on
2. Complete the form
3. Click the 'Save and Add Another' if you wish to enter another comment for the same document, or 'Save' button if you're done entering comments

Action Items

How do I add an action item to a group?

Note: You must have the correct role and privileges in a group to add an action item

From the group home page:

1. Click the 'Add an Action Item' link, located to the right of the group info at the top of the page
2. Complete the form
3. Click the 'Add Action Item' button at the bottom of the page

From the action items page:

1. Click the 'add action item' link, located below the filter settings on the left side of the page
2. Complete the form
3. Click the 'Add Action Item' button at the bottom of the page

Email

How do I send an email to a group mailing list?

Note: You must have the correct role and privileges in a group to send an email to the group list

From your email program (Outlook, Mail, etc...):

1. Find the email address for the group located in the group information at the top of the group home page
2. Compose and send a new message to the group email address (note that you will need to send the message from the email address that is association to your user account in Workspace)

From the group home page:

1. Click the 'Send Email' link, located to the right of the group info at the top of the page
2. Complete the form
3. Click the 'Send Mail' button at the bottom of the page

From the email messages page:

1. Click the 'send email' link, located between the group name and the list of messages
2. Complete the form
3. Click the 'Send Mail' button at the bottom of the page