

IMPLEMENTATION GUIDELINE

EGROUPWARE ENTERPRISE LINE (EPL)

Preparation for EGroupware Administrative Workshop

1. Create users and groups

- a) List of users.
- b) List of groups. Which kinds of groups are needed and useful regarding access rights, use of applications and exchange of information?

2. Which applications each group is starting with?

- a) Does every user / group need all available applications? Too many can be confusing in the beginning.
- b) Which applications should be used to share information efficiently?
- c) Examples: knowledge management → use of Wiki or Knowledge Base, or both? Task management: does the sales department use the address book in combination with InfoLog as a CRM, while other departments (e.g. a service team) use the tracking system for process monitoring?

3. Distribution of rights / Access control

- a) Access plan for groups in each module. How much each group is sharing information, on which level and to whom?
- b) Right to read, edit, add or delete information has to be granted on level of each group in each application separately.
- c) Access rights are granted by a group and/or an user to other groups and/or users. It is recommended to grant access rights on group level (rather than on user level) to keep track of the access rights situation in the team.
- d) Note: rights between two groups are not automatically a two-way-situation. A read-right granted by Group A to Group B means not, that Group A has a read-right for information of Group B. Those access rights has to be organized explicitly according the above mentioned access plan.

4. Categories

- a) Categories are used in EGroupware to label data in order to filter information easily.
- b) It's recommended to create categories on application level (module categories) rather than EGroupware global categories.
- c) Example: address book might need other kinds of categories to tag and describe contacts than in the calendar (categorize events or appointments).

5. E-Mail application

- a) EGroupware offers a powerful IMAP client for efficient E-Mail management. It has to be decided whether EGroupware's E-Mail client will be used for effective information management on the web platform.
- b) The E-Mail module gives awesome organisational opportunities by converting incoming or outgoing E-Mails on click to EGroupware tasks, which can be embedded into further processing.
- c) Furthermore the E-Mail client is multi-IMAP enabled and can manage as much different IMAP E-Mail accounts as needed on user level.

6. Preferences

- a) Preferences predetermine the look and feel as well as the functionality of each module. The administrator has to decide about the level of predefinitions for users.
- b) "Forced preferences", which cannot be changed by the user vs. "default preferences", which can be overwritten by the user's personal preferences.

- c) Reduce complexity by forcing as much preferences as possible on level of each application and for EGroupware in general (e.g. date format, languages, display of user data, user selection).

7. Notifications

- a) Plan the level of notification density. Several applications allow notifications about changes of the data. Form and extensiveness have to be agreed with the users.
- b) The content and the level of notification messages are customized in the module preferences.
- c) Example: calendar → notification about an invitation or change of appointment. InfoLog → notification about delegation, start, due date or changes of a task.

8. General questions

- a) Address data import /address maintenance /address books
- b) Setup of file manager: data structure and content
- c) Access to file manager by desktop clients on base of WebDAV.
- d) Custom fields and types for example in address book and InfoLog
- e) RTF/ODT/DOCX/Email forms for use in the address book for groups/users (e.g. serial letter or label print).

9. Team agreements

- a) It's important to specify in advance how data and information will be proceeded. Team agreements on base of a common understanding of the capabilities of the software are helpful to obtain the best possible result.
- b) Example: InfoLog (task management) – a task was delegated to user. This user can add notes and process information to this task or could add a subentry to proceed.
- c) If users work on a task together, it is advisable to add e.g. a timestamp (date) and user's initials at the beginning of an entry, to identify who added information and when.
- d) New information can be added either on top or underneath existing entries, depending on the agreement.
- e) By converting E-Mails to tasks (InfoLog entries), information can be distributed on the web platform easily by delegation without the need to spread information by copying using E-Mail distribution lists.