

Kavi® Groups

Application Summary

As the first enterprise-level collaborative Web environment for standards organizations, Kavi Groups provides an IT solution specifically created to facilitate collaborative, team-based processes. Kavi Groups rich, finely honed feature set was developed through an ongoing responsiveness to customer requests and a best-practices expertise garnered during Kavi's long specialization in the standards sector.

Kavi Groups decomposes the organization structure into discrete groups so that each can work safely on its designated tasks with an optimal degree of transparency and accountability. Everyone with a stake in the organization—leaders and administrators, group chairs, voting members, active contributors and observers—is presented with a personalized view of organization activities, with all the tools they need to participate and communicate at their fingertips while Kavi Groups quietly enforces the appropriate level of access based on user permissions and data object restrictions. The application handles thousands of administrative details and meticulously tracks activities to free up stakeholders' time, energy and talent so it can be invested directly in achieving the organization's goals.

Group Home

Each group gets its own Group Home: an all-inclusive, access-controlled environment that provides immediate access to group information and all the tools needed to manage that information. Group Home displays an overview of current activity within the group, including recent and upcoming event, so the user can scan the page quickly and click links for those items that merit further attention or action. Tabs provide centralized access to different types of content or activities, such as the calendar, email archives, documents, etc.

My Groups

For a holistic view of all their groups and activities, users can visit the My Groups area, which displays activities from all groups to which the user belongs. Here users can view and access all their open ballots and mailing list subscriptions. The calendar and RSS feed offer roll ups of recent activity in all of a user's groups. Links allow users to jump easily from one group to the next to review documents and add comments.

All Groups

The All Groups landing page presents an overview of organization structure to help new participants get oriented and longer-term participants view information about groups they haven't joined. All Groups displays the General Membership Calendar, recent organization-wide ballots and documents, and links to all groups the user is eligible to view or join.

Data Sharing and Data Mining

Sharing Model Based on Organization Structure and Group Relationships

Organization structure—including hierarchical and parallel relationships between groups—is configured into each Kavi Groups implementation. This serves as the foundation of a sharing model that facilitates inter- and intra-group communication while preserving the right balance of transparency and security. When a subgroup is shared with a parent group, the parent group can be given complete access to subgroup content (if mandatory sharing is enabled), or access can be granted selectively on a per folder or per item basis (by enabling optional sharing). Inbound and outbound sharing can be configured for each group's roster, events, email archives, documents and ballots. Users in the parent group may be allowed to comment and vote on shared documents, and email notifications about shared items are sent to both the originating group and the parent group. The group chair of the parent group is automatically given group chair permissions in each subgroup.

Instant Access to Information Stored Anywhere in Kavi Groups

Kavi's state-of-the-art search engine indexes virtually all textual content in Kavi Groups, so users can quickly locate and retrieve whatever content they have permission to view, no matter how vast the data or how complex the group hierarchy.

All kinds of data objects are included in the searches, so users can search for documents by number, comments by submitter, email messages or action items by subject, etc.

Context-aware and historical search links make it easy to explore related materials or revisit recent searches with a single click.

Protect Content through Fine-Grained Permissions while Logging Access

Within a group, access to events, ballots and other activities can be configured so that different types of participants are granted different levels of access. Documents, and activities related to the document such as commenting and balloting, can be controlled at as fine a level as needed. Access rules can be set at the folder level and for an individual document. To provide an extra layer of oversight, document access is logged, stored as part of the organization's permanent audit trail and conveniently accessible through reports.

Team Communication

Collaboration-Oriented Design

Kavi Groups balloting tools support open balloting to foster collaboration, build consensus and identify aspects of emerging standards where there may be divergent opinions, questions, comments or other points that need to be addressed.

Email Notification

Email is integrated into every aspect of Kavi Groups to keep the organization well-knit and effortlessly synchronized. Most activities generate automated email notifications, and the user who initiates the activity can generally customize or suppress the message as desired.

Current, Contextualized Information

Group communication is well-supported through rosters, group-specific mailing lists, calendars and other collaboration tools. RSS feeds—filtered according to each user's permissions—provide an interesting new way to navigate information published through the organization's Kavi Groups pages and keep abreast of organization activities.

Process Facilitation

Snapshots of Group Activity Orient Users Instantly

Group Home presents an encapsulated view of group activities based on what the user's role is in this group. Users take in recent activity in a glance, then click links or open tabs to get more information or take action. Each page provides links to send email, manage documents, submit comments and everything else the user needs to participate fully in the group.

Desktop Integration for Enhanced Productivity

Desktop integration brings the organization to the user. Calendar data can be downloaded in iCalendar format to desktop calendars, roster contact information can be downloaded as vCard into personal address books and RSS feeds keep users apprised of the most recent mailing list messages and activity notifications.

Lightened Workloads for Busy Group Chairs

Kavi Groups automates many routine group management tasks to lighten the workload of group chairs and remove barriers to effective communication within the group. The group chair can rely on Kavi Groups to keep the group roster and participant permissions up-to-date, automatically granting or revoking access when appropriate. To view the user's roles and activities, the chair has only to click the user's name in the roster. In the Group Home area, the chair sees all activities that are taking place in the group and can manage these activities singly or in bulk.

Transparent Enforcement of Complex Rules plus Rigorous Compliance Tracking

The group chair is relieved of the need to enforce many group join and participation rules because Kavi Groups' extensive configuration options allow complex join and participation rules to be set, then enforced almost transparently by the system. Configured rules enforcement may be handled exclusively by the system (such as hiding group links if the user doesn't have a prerequisite Company Type) or may include facilitating moderated processes, such as when rules require approval by the company's primary contact before a company representative is allowed to join a group. Balloting and voter eligibility rules can be codified so that voter eligibility and quorum are calculated automatically, backed by Kavi Groups participation data.

Kavi Groups Features

Interactive, Up-to-Date Rosters

- Kavi Groups' rosters are integrated with the Kavi Members database, so participant and company information is always up to date. Roster visibility is configurable, and is displayed

to participants based on their assigned role. These roles are custom to the organization, and participant privileges are defined specifically for each group.

- Users just click the name of a person or company listed in the roster to see contact information and other details.
- When group chairs view rosters, participant roles are displayed, and if balloting is enabled, the roster shows which participants have voting privileges. To view more complete information or manage a participant, the chair or administrator just clicks the user's or company's name.
- Roster information can be exported as spreadsheet and vCard.

Sharable Calendar Events with Build-in Attendance Tracking

- Each group has its own calendar with events that were added specifically for the group. These events may be shared with the parent group and displayed on the parent group's calendar as well, or with everyone in the organization, in which case the event is also displayed on the General Membership Calendar.
- Depending on the group's configured permissions, chairs and administrators may be the only ones who can add events, or other participants may be allowed to add events. Users from the parent group may also be able to add events to their subgroup's calendars.
- Calendar events may be associated with other data objects, such as documents and ballots.
- Event attendance can be recorded through Kavi Groups tools by participants, the group chair or an administrator.
- The calendar available through My Groups contains a rollup of events drawn from all of a user's groups.
- Calendaring tools support the iCalendar standard ([RFC 2445](#)), so the data can be exported for use in Outlook and other applications, or embedded in automatically generated email notifications. Users whose clients support subscriptions can have their Apple iCal or other desktop calendar tool updated automatically.

Access-Controlled Document Repository

- Kavi Groups version control system preserves all versions of a document for future reference, including dates of changes and which user uploaded each revision.
- Kavi Groups logs document access and creates date-stamped records of who submits a document agreement, who submits or resolves comments, etc. Participant reports include document-related activities.
- Document managers are given granular control over other user's ability to add, edit or delete documents, or change document metadata.

Automated Comment Collection, Tracking and Disposition

- The Kavi Groups commenting feature manages comments submitted on documents or ballots. Comments are enabled and managed on a per-document or per-ballot basis.
- When commenting is enabled for a document, authorized users can submit a substantive or editorial comment and a proposed solution. The document owner, comment owner or group chair can enter a response to the comment and set a value to indicate the state of the

comment, such as whether it is resolved or not. These states can be custom to the organization.

- Ballot comments can be collected for abstentions and negative votes.
- All comments, responses and other actions are stored with the document or ballot and become part of the persistent record.

Consensus-Building Balloting and Participation-Based Eligibility

- The Kavi Groups balloting feature was developed to support the open, collaborative processes of standards organizations. Ballots are a way to check participant consensus on the emerging standard and identify areas where participants need clarification or see an issue they would like to have addressed. The easiest way to collect this information is to enable ballot comments.
- Balloting processes are eased by automatic enforcement of eligibility rules, predefined ballot instruction templates and automated vote tallies.
- Voting can be on a per person or per company basis. When voting is handled on a per company basis, a primary and alternate voter can be designated for each company and Kavi Groups will make sure that the alternate's vote isn't counted if the primary voter submits a vote.
- Meeting attendance data is collected for participation reports and voter eligibility can be contingent on meeting attendance and voting participation records.
- Automated balloting and ballot reporting includes intensive logging for reliable, auditable results. Logging includes whether a ballot was amended. Voting records are retained even if a company is deleted from the organization's Kavi Members database. Ballots can be exported as read-only HTML reports for easy storage as part of the permanent document record.
- Organizations that don't use the balloting feature can omit balloting elements from their Kavi Groups installation.

High Visibility Action Items

- Action items are added on a per-group basis by administrators or authorized participants.
- Once added, an action item is displayed with other action items originating in the same group on the Group Home page, and with action items from all a user's groups on the My Groups page.
- Action items can be resolved or modified by users with the appropriate permissions, and all activities related to action items are logged and become part of the audit trail.

Email Notification, Mailing Lists and List Archives

- Kavi Groups provides a multitude of opportunities to send email. User's names are displayed as clickable links that open mail browser windows.
- Group mailing lists support an optional digest mode, threaded online archives and archived attachments.

Reporting and Logging

- Logging and user activity report. User activity information can be factored into voting rules and eligibility.
- Reports include user document access.

Integrated Environment

- Like other Kavi applications, Kavi Groups is deployed in a secure, stable, cohesive environment maintained 24/7/365 by dedicated Kavi staff.
- Because Kavi Groups draws user and permissions data directly from Kavi Members, group rosters and contact information are always up to date and users are always given the appropriate level of access.
- Kavi Groups customization hooks and built-in support for custom tabs allows custom areas and tools to be added as needed to accommodate your organization's processes.

New in Kavi Groups

Visit the Kavi Groups Release Notes and Changelogs on the Kavi Community site:
http://community.kavi.com//khelp/changelogs/select/process?app_meta_type=PHPGroupsApp¬es=1