Getting Started Guide for Managers

SiteScape Forum
SiteScape WebWorkZone

This manual describes the initial steps that Forum and WebWorkZone managers need to perform in order to set up our software.

Product Version: SiteScape Forum, Version 7.0, and WebWorkZone's 12/1/02 update
Publishing Date: November, 2002

First Printing November 1999

Revised February, September 2000, May 2001, November 2002

Table of Contents

About This Manual

This chapter provides introductory information about using this manual to learn about managing Forum and WebWorkZone.

What is in This Manual?

This manual assumes that you have skimmed the *User Guide*, and provides you with information about the following:

- Setting up your zone so that your users can get started

  We provide two tutorial and three general-purpose forums for your users. *Forums* are the primary collaboration tools of our software, and include discussion forums (where you can post topics and replies, share documents, conduct polls, and post URLs), calendars, tasks, chat rooms, and the messaging window.

  This manual explains how to set up your zone so that it is minimally configured to the specifications of your organization.

- Understanding management roles

  You may choose to delegate management of workspaces and forums within your zone.

- Creating a *custom command*

  By creating custom commands, you can create entries in discussion forums that match the way that your users do their work. For example, using simple HTML menus, you can create custom commands and entries such as “Enter a Bid,” “Enter a Resume,” “Add a Defect Report,” and so on. The entries contain custom information that applies to construction bidding, resume tracking, defect reports, and other processes.

- Creating a *workflow process*

  Many customizations require the creation of a workflow process that can be initiated for a standard or custom command in a discussion forum. Workflow processes define steps through which an entry must pass, automatically notifying individuals or groups when they are required to take action on the entry. For example, a construction bidding workflow process can send e-mail to all foremen when a contractor enters a bid, hide the entry from competing contractors, identify decisions made about bids (“Need More Information,” “Under Consideration,” “Rejected,” “Won”), and notify the head foreman when a bid has been stuck in one step of the process for too long and needs action.

- Creating additional workspaces

  Workspaces are virtual office spaces for subgroups within your organization. Everyone in your organization can access the zone workspace, and, as an option, you can create additional workspaces as needed.

- Next steps

  Implementing a robust collaborative environment using our software requires working closely with your users, understanding their work, integrating the use of our software into the culture of your organization, and customizing our software as your users' needs change. This manual provides pointers to more information about these topics.

What are the Conventions?

This manual employs the following conventions:

Table 1: Conventions

What you see	What it means
Add toolbar item Click on the **Getting Started** link Click on the **Add Document** menu item Click on the **Close** button	Toolbar items, links, menu items, and buttons are presented in **bold** font.
Type `status`, then press Enter. Open the `wwz_quickstart.doc` file.	Text that you must type and file names are presented in `Courier` font.
A *workspace* is...	A new term is presented in *italic* font when it is first defined.

This manual includes pictures from Forum and WebWorkZone. The pictures illustrate how to perform various tasks, and they apply to both Forum and WebWorkZone.

Where Can I Get More Information?

This manual presents getting started information for managers, but does not provide a complete reference of all available management commands.

To view a complete reference, do the following:

1. Log in.
2. Click on the **Help** toolbar item located above the right side of the blue toolbar.

   Help information appears in a separate browser window.
3. In the Help window, click on the **Show Help topics for managers** link, located at the top of the left frame.

   You can find introductory information in the “How do you...” and "More information about..." sections located toward the bottom of the page in the right frame. To view information about a specific management task, click on its linked title in the left frame.

In addition to reading the information provided in this manual, we invite you to participate in SiteScape's support, Help, and customization forums. These forums provide a greater level of detail (especially about some of WebWorkZone's more technically challenging features), collaborative exchanges with SiteScape engineers and with members of our support team, and the most up-to-date information available about our products and services.

For more information, use the following URLs to access these forums:

Support: http://support.sitescape.com/forum/support/dispatch.cgi/wwzsupport

Help: http://help.sitescape.com/

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

Note: *Forum managers can proceed to Chapter 2.*

Chapter 1: Creating Your Zone

The first step in using our software is to create a *zone* for your organization. In short, a zone is "everything and everybody." It contains usernames for all members of your organization, and it contains all of the *forums*, tools, and work areas (called *workspaces*) that you need to collaborate online. (For more information on forums and workspaces, see the *User Guide*.)

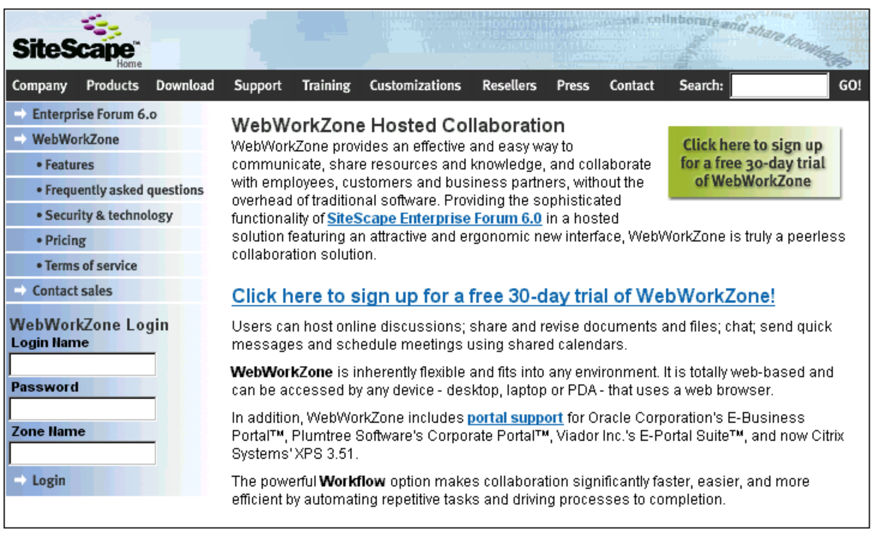
Note: *Forum managers create their zone upon installation. If you are a Forum manager, please proceed to Chapter 2.*

To create your zone, do the following:

1. Access WebWorkzone's home page by directing your browser to the following URL:

   https://webworkzone.com

   The WebWorkZone home page appears.



2. Click on either the button or the link to sign up for a free 30-day trial of WebWorkZone.

   The "Welcome to WebWorkZone" form appears.

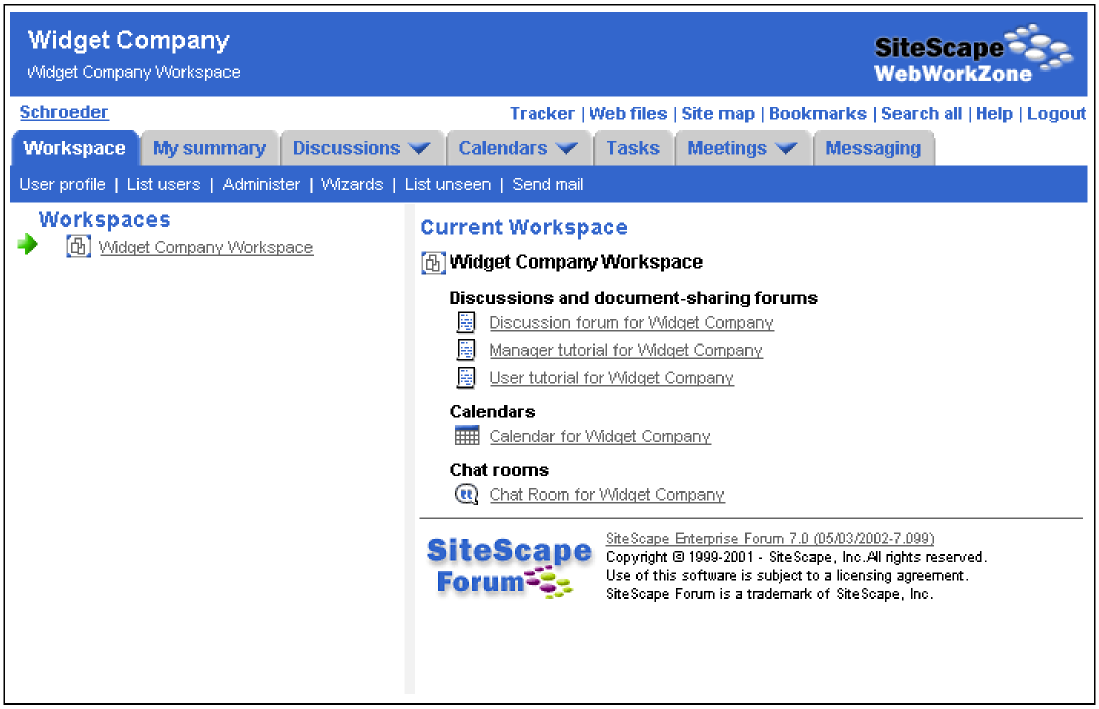
3. Fill out the form, using the information in the grey box for assistance. Make sure you read and agree to the Terms of Service Agreement.
4. After you finish filling out the form, click on the **Next** button at the bottom of the page.

   If you clicked on the billing information checkbox, WebWorkZone presents a wizard page that assists you in providing this information.

   Otherwise, WebWorkZone displays the "Congratulations" page, which provides you with an overview of your zone registration information. You may want to print this page for future reference.

5. Click on the **OK** button at the bottom of the "Congratulations" page.

   WebWorkZone displays the *zone-workspace* page of your newly created zone. The following picture is similar to what you see when you first view your zone workspace:

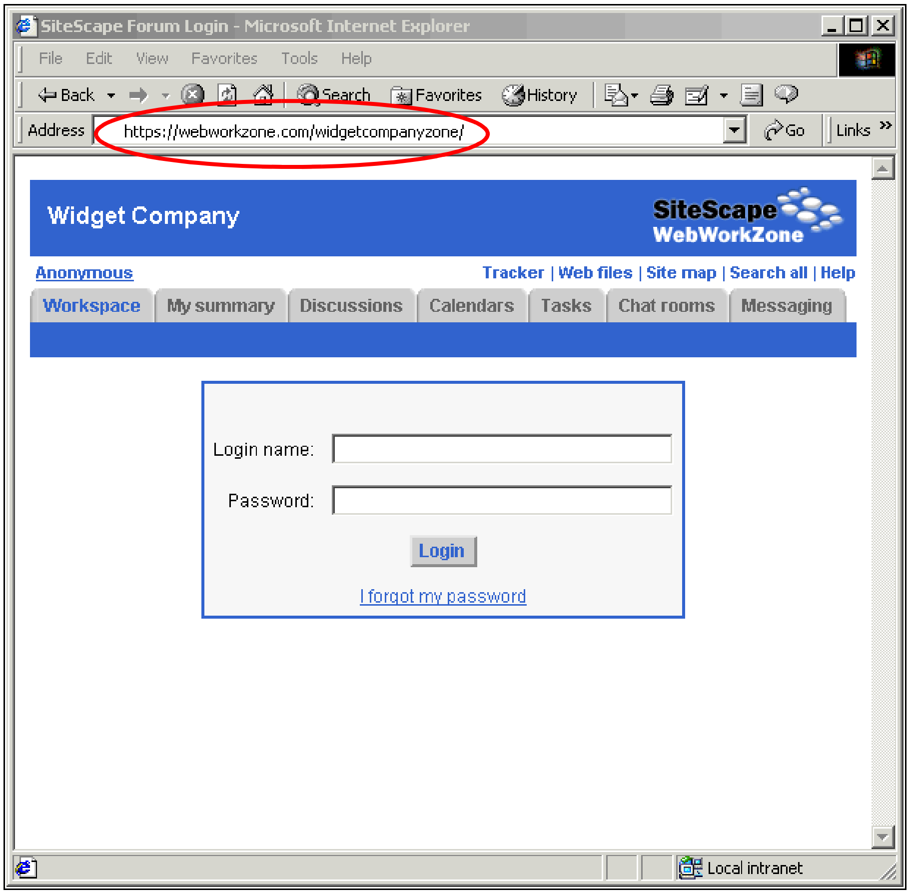


Notice that in the upper-left corner, WebWorkZone displays the name you specified when you provided your zone registration information. This is your *username*. When WebWorkZone displays your username in the upper-left corner, it means that you are logged into the system.

WebWorkZone provides two discussions that serve as tutorials for general users and for managers. (Only you and the users you designate as zone managers can see and access the managers' tutorial.) WWZ also provides a new discussion, calendar, and chat room for use by all members of your organization. Although WWZ is immediately usable, please follow the instructions in Chapter 2 to make sure that your zone is optimally configured and ready for your users.

As shown in the previous picture, immediately following the creation of the zone, WebWorkZone logs you in automatically. In the future, you must provide your username and password to WebWorkZone before you can be logged in.

Let's assume that you close your browser, and, the next day, you want to access WebWorkZone. The following picture shows you how to specify a URL to your browser that includes your zone's short name as a way to access your zone quickly:



Specify the URL shown in the picture to get to WebWorkZone's Login screen, replacing `widgetcompanyzone` above with the zone name you specified when you created the zone. Enter your username and password, then click on the **Login** button. (You may want to bookmark this page so that you can get to it quickly in the future.)

If you forget your password, leave the text boxes blank and click on the **I forgot my password** link. WebWorkZone then uses the e-mail address that you provided during zone registration to send you a new password.

Chapter 2: Configuring SiteScape Software

Before your users can enjoy the benefits of using Forum or WebWorkZone, you need to perform some initial management tasks to configure our software.

The management tasks in Forum and WebWorkZone are divided into four different sets, depending on level of access:

- Manage the zone
- Manage this workspace
- Manage groups
- Manage users

Because the tasks have been separated into sets, each management menu requires only minimal scrolling for you to view all of its items. In addition, the tasks on each menu are divided into groups based on the type of task you can perform. For example, on the workspace management menu, there are five categories of tasks, including "Manage workspace features," "Manage workspace layout and display," "Manage access control," and more. The tasks that belong to each group appear below their group name, so you can find the task you want quickly.

With the convenience of the new menus, you can perform complicated tasks without having to navigate up and down the zone/workspace/forum hierarchy. For example, to set up a new workspace, you can create new groups of users from the "Manage groups" menu, then navigate directly to the "Manage the workspace" menu to create a new workspace. From the same menu, you can create new forums for your workspace, and use access controls to specify which groups will have access to each forum. In this way, you can use tools at various levels of management with just a few clicks of the mouse.

> ***Note:*** *If you do not have access privileges to manage a resource, the management menu for that resource is unavailable to you.*

Of course, complex tasks such as setting up a new workspace require a lot of planning in advance. For more information, refer to the manual *Getting the Most Out of Online Collaboration*.

In This Chapter

This chapter describes all of the steps necessary to set up SiteScape software so that it is minimally configured to the specifications of your organization.

What you need to do	*Why you want to do it*
Use Management Pages	You can use our new management menus to perform tasks that affect various resources without leaving the context of the current workspace or forum.
Log In As a Manager	Logging in to the zone-management account allows you to perform all of the management tasks for the zone and the current workspace.
Set Access to the Zone Workspace	You need to decide who has the right to view your zone workspace, which is the workspace accessible to all users in your organization.
Set Access to the User Database	You need to decide if you want users to have the right to register themselves (this is the default), or if you want zone managers to register users.
Create Groups	You need to be able to create and manage groups to take full advantage of our software’s access control options.
Disable Access to Product Features	There are optional features that you can turn off.
Specify your E-Mail Server (Forum only)	You must specify an e-mail server to enable Forum’s mail features.
Perform Basic Customizations	You may want to change the name of the zone to the name of your organization, or you may want to add introductory or trailing text to the zone-workspace page.
Enable a Discussion Forum for E-Mail Notifications	Users cannot receive e-mail notification of new or modified entries in a discussion forum unless you enable this feature.
Invite Users to the Zone	Provide the e-mail addresses of your users, and the software sends users a link to pages that guide them through the registration process.
Add Users to Groups	Users are often granted or denied access to forums according to their group membership.
Read *Getting the Most Out of Online Collaboration*	Configuring our software and leaving the workspace sparsely populated is not enough to create a useful, intuitive collaboration environment. There are a few more tasks you need to accomplish before that can happen.

Use Management Pages

Forum's management menus allow you to perform tasks that affect various resources without leaving the context of the current workspace or forum. In addition to the tasks necessary to manage the current resource, each management menu contains links to other menus, so you can easily navigate to the set of tasks you want.

Access the Management Menus

To access the management menus, you need to be logged in as a manager. You can access the menus from your workspace page or "My Summary" page by clicking on the **Manage** toolbar item, and selecting the level you want to manage from the drop-down menu. If you have the appropriate access privileges, you can manage The zone, This workspace, Groups, or Users.

Managing a discussion forum or chat room requires a different path. From the discussion forum or chat room that you want to manage, choose **Administration** from the **Tools** menu. (Chat and discussion managers may not have access to the higher-level management menus.) Other forums, such as Tasks and Calendars, do not yet support the new-style management pages. To manage one of these forums, you can use the forum-specific toolbar item to access the forum's management tools.

Navigate the Management Menus

At the top of each management menu, you can see the name of the area you are currently managing. Below this name, in the "Select other management areas" section, you can see navigation links to the other management menus. You can use these links to perform a variety of tasks at different levels of management; for example, you can move from zone management to workspace management to user management. For more information, you can click on the information icon next to each link, as follows:

For illustration only: 

When you are finished using the management menus, click on the **Close** button on each menu you opened to return to the previous page.

At the time of this writing, you can navigate from a discussion or chat management menu to the other management menus. However, you cannot use the navigation section to return to managing the individual forum.

Read about Management Menus

In this manual and in the online Help system, each page that describes a management task on the new menus contains a navigation guide that looks like the following:

Manage > Users

Navigation:

Look for...	*Click on...*
Basic user management tools	**Register a user**

In the header above the table, the word to the left of the "greater than" sign (>) refers to the toolbar item you need to click on (in this case, **Manage**), and the word to the right of the "greater than" sign refers to the menu item you need to select to view the appropriate management menu (in this case, **Users**).

In the left column of the table, the group name that appears refers to the row you need to look for on the management menu.

In the right column of this table, the task name that appears refers to the specific link you need to click on in that row of the management menu.

For managing discussion forums or chat rooms, access the management tasks through the **Tools** menu as follows:

Tools > Administration

Instructions for performing the task appear below each navigation table.

Log In As a Manager

You need to log in with a manager account in order to set up our software for your users.

To log in as a manager, do the following:

1. Provide a URL to your browser that allows you to view the zone-workspace page.

   The URL differs according to product, as follows:

   Forum: `http://`*`yourcompany.com/avf/aca-1/`*`dispatch.cgi`

   WebWorkZone: `http://webworkzone.com/`*`zonename`*

   Note: *Replace portions of the URL above with values that you specified during installation or zone creation.*

2. In the “Login name” box, enter the username of the zone manager, as follows:

   Forum: Enter `wf_admin`.

   WebWorkZone: Enter the username of the person who created the zone.

3. Press the Tab key to move to the next line of the form.

4. In the Password box, enter the password you specified when you installed Forum or created the zone.
5. Click on the **Login** button.

   The zone-workspace page appears.

The zone manager's group name is slightly different in Forum (SSF Administrators) and WebWorkZone (Administrators). However, when configuring your zone, the functions of the groups are the same. From this point forward in this manual, the group name "Administrators" refers to both SSF Administrators and WebWorkZone Administrators.

By default, members of the Administrators group have the right to manage the zone. This means they can create new workspaces, create forums, add users, and so on. (For a complete list of zone management tasks, click on the **Zone Management** link in the table of contents located in the left frame of the online Manager Help system.)

If you choose to give other users the right to perform zone management, you can add those users' names to the Administrators group.

Set Access to the Zone Workspace

The *zone workspace* is the first page you view when you enter the zone. It is identical in function to all other workspace pages. As a manager, you may find it useful to control who can or cannot view the zone workspace. For example, using Forum, you can disable access to the zone by anonymous users. Or, using WebWorkZone (which disables anonymous access by default), you can require that registered users be added to a group before they can participate.

If you want to prevent anonymous users from viewing any page in your zone, you need to change the default access to the zone workspace.

Manage > This workspace

Navigation:

Look for...	*Click on...*
Manage access control	**Set workspace access control**

1. Navigate to the "Role-based access control" page.

   (If the ACL table appears, click **manage by roles**.)
2. Make sure the link in the upper-right corner reads **Inherit role membership definitions**. If the link reads **Specify role membership definitions**, click on it.
3. In the Visitors column, click on the "Anonymous users" checkbox.
4. Click on the **Remove the selected groups from the roles** button.

   The "Role-based access control" page reappears. Anonymous users are no longer in the Visitors role, so they cannot view any pages in the zone.

To return to the zone workspace, click on the link at the top of the page.

Note: *The preceding is one of two methods we provide to control access. See Chapter 4 for an overview of the two methods.*

Set Access to the User Database

When you set access to the user database, you determine who has the right to create user profiles, modify user accounts, create groups, and more.

Manage > Users

Navigation:

Look for...	*Click on...*
Basic user management tools	**User database access control**

1. Navigate to the ACL table for the user database.
2. Check and uncheck the boxes to alter the access control to the user database. Altering this access affects activities such as creating user accounts, modifying them, deleting them, and so forth.

   If you want to prevent anonymous users from being able to register themselves, remove the check from the Anonymous Users row and the "Create a new user account" column.

   You can also use this table to allow a group other than Administrators to create user accounts and groups.

   Note: *The SSF Administrators group should retain access-control and administrative privileges; as a general guideline, do not remove the checks from this row.*
3. Click on the **Apply** button.
4. Click on the **Close** button.

Create Groups

If you want every user to be able to access every workspace or forum within your zone, there is no need to define groups beyond the default groups. However, if you anticipate creating resources that are exclusively designed for subgroups within your organization, it can be helpful to define groups now.

For example, if you are a member of a ten-person team that uses our software to complete a focused project, do not define groups. If you are working for a large company that has significant or large subgroups (for example, the sales department, the marketing department, and so on), then, as a convenience to yourself, you can define those groups now.

In version 7.0, you can also allow groups to contain other groups. In this way, managers can define groups that match their company's organizational structure, and then create additional project-based groups to contain the relevant groups of users. For example, if your company has engineers in the USA, Japan, and France, you might have three groups called “Engineers USA,” “Engineers Japan,” and “Engineers France.” Then, all three of these groups could belong to a larger group called “Engineering.”

The groups-within-groups feature simplifies forum management by separating the responsibilities of group management and access control. The owner of a group is in charge of the group membership, and the owner of a forum can easily choose the groups that can access the forum. If the group owner makes changes to the group membership, these changes do not affect access control.

There are several ways to define groups, and this section shows you one way.

To define a group, do the following:

1. Access your zone-workspace page.
2. Log in as a zone manager.
3. Click on the **Wizards** toolbar item.

   Our software displays the "Wizard menu" page.
4. Click on the **Create a group** link.
5. Read the introductory page to the "Create a group of users" wizard, and then click on the **Next** button.
6. Provide a name for your group, and click on the **Next** button.

   Group names can be multiple words, and you do not have to enclose the words in any way (for example, you do not need to use quotation marks). The following are examples of possible group names:

   ```
   executive board
   management
   IT
   marketing department
   sales department
   ```
7. For now, skip the "Search..." page by clicking the **Next** button, since you have not yet invited users into the zone.
8. Review the "Summary for the group" page, and, if you are satisfied with the group's name, click on the **Finish** button.

   If you would like to rename the group, use the **Back** button to view the "Group name" page and specify another name.

   Our software displays a "Congratulations..." page. You have just created a group that has no members and is owned by a zone manager. After users have been invited to the zone and registered, you can add them to the appropriate groups. (The "Set up your zone" section describes how to do this.)

To add more groups, click on the **Close** button on the "Congratulations..." page, then repeat steps 4 through 8. Repeat this process for every group you wish to create.

Do not be concerned about creating every possible group for your organization, because you can always create groups later. At this point in the setup process, we recommend creating groups for the major divisions within your organization (for example, major departments or powerful administrative workgroups).

Let your users come back to you to request the creation of additional groups, because the groups will then mirror how your users are actually doing their work with our collaboration software. (Creating an organizational structure that matches the way your users do their work is covered in greater detail in the hardcopy PDF manual, *Getting the Most out of Online Collaboration*.)

Disable Access to Product Features

There are features of our software that we allow you to turn off, if they do not meet your organization's needs, or if they are counter to your organization's philosophies and policies.

Also, we have features that are disabled by default and that we allow you to turn on. These features are predominantly features from previous versions of our software that we make available to our previous customers for backward compatibility. If you are a new user of our software, we recommend that you not turn on these features, as some features are not documented, and they are not designed to be integrated with the tabbed interface.

Manage > The zone

Navigation:

Look for...	*Click on...*
Zone management tools	**Select features for this zone**

1. Navigate to this management page.
2. Click on the checkboxes of the features you want to turn off or on.
3. Click on the **OK** button.

The most common uses of this page are as follows:

- To turn off the ability to use messaging or chat rooms, if messaging or chatting does not match the culture of your organization
- To control the type of e-mail notifications that are used
- To prevent users from uploading potentially large files

Specify your E-Mail Server (Forum only)

To enable users to use the **Send Mail** feature in several forums, and to enable them to receive e-mail notifications, you must provide Forum with information about your e-mail server.

Manage > The zone

Navigation:

Look for...	*Click on...*
Configuration tools	**Manage e-mail properties**

1. Navigate to this management page.
2. Provide the name of the machine that runs your "outgoing" SMTP e-mail server software.

   Your system administrator can provide the name of this machine, if you do not know it. If the machine on which you installed Forum also runs an e-mail server, just specify "localhost".
3. If the default port number is not correct, change it.

   If you do not know the port number of your e-mail server, consult your system or network administrator.
4. Provide a default "from address" for all e-mail notifications sent by Forum.

   The address must have correct e-mail syntax, but it does not need to correspond to an actual e-mail account. For example, you can enter the following:

   `yourname@yourcompany.com`
5. Click on the **OK** button.

   Your e-mail server has been specified.

Perform Basic Customizations

Our software provides you with wizards that quickly implement basic customizations. For example, you can change the title of your zone or workspace, add a graphic (such as a company logo), add introductory text to the workspace page, and add text to the end of the workspace page. By taking advantage of these simple customizations, you can make your zone and workspace page friendlier and more intuitive to your users.

To change the name and graphic of the zone, do the following:

Manage > The zone

Navigation:

Look for...	*Click on...*
Zone management tools	**Modify the zone**

1. Navigate to this management page.

   The “Modify the zone” wizard appears.

   Using the “Modify the zone” wizard, you can make the following modifications:

   - Change the name of the zone

     In the text box, enter a zone name that reflects the nature of your entire organization (for example, "WidgetCo Zone" or "Widget Project Team Zone"). This title appears in the upper-left corner of the large, blue bar at the top of the page.

   - Upload a new zone graphic

     Use the **Browse** button to the right of the text box to specify the name of a .GIF or .JPG file (such as your organization's logo). This graphic appears in the upper-left corner of the large blue bar at the top of the page, just to the left of the zone name.

     Since it is helpful to preserve vertical space on web pages, we recommend that you choose a graphic with a small height (72 dpi, no taller than 100 pixels).

   - Or delete the zone graphic

     If you previously uploaded a graphic that you wish to remove, and if you prefer to have no zone graphic, do not specify a file name in the "Upload a new zone graphic" text box, and click on this checkbox.

2. Follow the wizard instructions.

   Your changes are reflected in the blue bar at the top of the page.

Remember, these changes are optional. You can cancel the wizard at any time before you click on the **Finish** button.

To change the workspace name, greeting, or postamble, do the following:

Manage > This workspace

Navigation:

Look for...	*Click on...*
Manage workspace layout and display	**Modify workspace appearance**

Navigate to the "Modify the current workspace" wizard.

You can modify the following features:

- Workspace name
- Greeting text

  You can change the visitor greeting and the participant greeting. The visitor greeting is seen by members of the Visitors group only. As an example, you can enter a reminder to visitors that they must register in order to use your forums. The participant greeting is seen by the Participants group only. You might wish to enter a message with contact information in case participants have difficulty using Forum.

- Postamble text

  You may want to direct users to additional information and resources, other collaboration areas, or a company's homepage. You may use HTML tags in text boxes. For example, you can include an image that links to your company's homepage.

The following are some ideas for further personalizing our software to make it more inviting for your users:

- Consider adding an introductory entry to each new discussion forum that you create. This entry can take the form of a brief "mission statement" for the discussion forum—naming, for example, the subjects to be discussed, and perhaps some ground rules.
- Along the same lines, consider adding some new usage tips to the User Tutorial forum. If users receive practical advice about using Forum to accomplish tasks specific to your organization, they will be more motivated to do so.
- Try creating a chat session that your users will recognize as useful, such as a "brainstorming area" to prepare for a big meeting. Make sure that the chat session's name clearly reflects its purpose (for example, do not call it "Chat Room 1").

More information on making your installation a vital part of your organization can be found in the manual *Getting the Most Out of Online Collaboration*.As mentioned, our software supports customization options that you can use to radically change both the look-and-feel and the functionality of the product. For example, using a combination of custom commands, workflow, and templates, you can create an application that is completely different from the existing applications (discussions, chat rooms, calendars, and messaging). You can create applications dedicated to purchase-order approval, documentation review, customer support, defect reporting, or any task that is routinely performed by your organization. For more information about customization options, click on the **Customizations** link in the table of contents of the online Help.

Enable a Discussion Forum for E-Mail Notifications

One of the most popular ways for users to track new and changed entries in a discussion forum is to have our software send them e-mail notifications. E-mail notifications provide a summary of recent activities in the forum, and provide links to the new or changed entries. However, users cannot receive these notifications until you configure the discussion forum to send them.

Tools > Administration

Navigation:

Look for...	*Click on...*
E-mail operations	**Set e-mail notification schedule**

1. Navigate to this management page.
2. In the "Set Mail Notification Schedule for new items in..." form, find the "Set notification message content level" section and click on either the "Send titles only" or the"Send titles and summaries" radio button.

   If you specify that you want the notification e-mail to contain a summary, the e-mail message includes a few lines of the discussion topic or document abstract, so that the user can get an indication of the context of the new or modified entry. If you specify this option, you must also specify the number of lines you want included in the summary. We recommend that you specify "a few lines" (2 or 3).
3. In the "Set the mail notification schedule" section, specify the days on which our software should send notifications; specify the days by clicking on the checkboxes under the days of the week on which you want to send notifications.
4. In the same section, specify the times during the day when you want our software to send notifications about new activity in this forum. You must specify the times using a 24-hour format, separating the hour value from the minute value using a colon (:). The following is an example of a schedule that sends notifications every hour and a half during a nine to five working day:

   ```
   09:00  10:30  12:00  13:30  15:00  16:30
   ```
5. Use the bottom of this form to specify a *distribution list*. By default, our software sends e-mail notifications only to members of this distribution list.
6. Click on the **OK** button at the bottom of the form.

   You have just enabled e-mail notifications in this individual forum.

Invite Users to the Zone

After completing the previous steps, your zone workspace contains enough forums to be initially useful and intuitive to members of your organization.

To invite users to the zone, do the following:

1. Access your zone.
2. Log in as a manager.
3. Click on the **Wizards** toolbar item.
4. Click on the **Invite users to join the zone** link.
5. Read the introduction, and click on the **Next** button.

   Our software displays the "Enter email addresses..." page.
6. In the "Enter the text of the invitation to be sent" text box, you can either leave the default wording or delete it and add wording of your own.
7. Use either the "Enter the e-mail address(es)..." or the "You may also enter multiple..." section of the form to specify the e-mail addresses of the people you want to invite to the zone. Click on the **Next** button when you are finished.

   If you want to enter e-mail addresses one at a time into separate text boxes, use the "Enter the e-mail address(es)..." section of the form. You can click on the **More addresses** button, and additional text boxes appear. Keep clicking that button until you have enough text boxes to enter all of your e-mail addresses.

   The "You may also enter multiple..." section of the form is particularly helpful if you have a pre-existing file that contains a list of e-mail addresses for all the people you want to invite to the zone. Make sure that the e-mail addresses are separated by commas, copy the list from the pre-existing file, and paste the list into the text box in this section. You can also choose to type e-mail addresses in this box, separating them with a commas.
8. Review the information on the Summary page, and click on the **Back** button to modify information if necessary.
9. Click on the **Finish** button.
10. Click on the **Close** button to exit from the "Congratulations..." page.

Your users receive an e-mail message with the text you specified on the "Enter email addresses..." page. The e-mail message also contains a link to the registration wizard. Users use this wizard to provide a username, password, and additional information.

Add Users to Groups

As users register, they cannot obtain privileges until you assign them to their groups. For example, you may want to add several trusted and capable users to the Administrators group, so that they can help you to manage the zone and its workspace. Also, if you created departmental groups, you can add people to their appropriate department group.

To add registered users to groups, do the following:

1. Access your zone.
2. Log in as a manager.
3. View the workspace page, if necessary.
4. Click on the **Wizards** toolbar item.
5. Click on the **Modify a group** link.
6. On the "Group name" page, click on the radio button next to the group to which you want to add users, then click on the **Next** button.
7. On the "Group title" page, alter or accept the current title, then click on the **Next** button.
8. On the "Search for user names" page, search for usernames to build the Selection List.

   There are three methods for adding user names to the Selection List text box:

   - You can click on the **all user names** link (do this only if your zone has a small number of registered users).
   - You can click on a linked letter or number in the list, and our software places in the box all usernames that begin with that character (so, click on "B" for all usernames that begin with the letter "b").
   - You can specify a search string, and our software places all usernames that match your search criteria in the text box. For example, if you specify the following:

     ```
     br*
     ```

   Our software places all usernames that begin with those two letters in the text box.
9. Select the usernames you want to add to the group, then click on the **Add** button to add them to the Selected Users text box.

   If you are using Windows, you can use Ctrl+click to select multiple items in a list. If you are not using Windows, use the method supported by your system.

   If you mistakenly add a name and wish to remove it, click on the username in the Selected Users text box, then click on the **Remove** button.
10. When the Selected Users text box contains the usernames of all the people you want to add to the group, click on the **Next** button.
11. Review the Summary page, and use the **Back** button to make corrections if necessary.

12. Click on the **Finish** button, then click on the **Close** button to exit from the "Congratulations..." page.

Read *Getting the Most Out of Online Collaboration*

Although the previous steps prepopulated your zone so that your users can get started, they did not teach you some of our most powerful management features. The chapters that follow include information about creating additional workspaces, delegating management, and using custom commands and workflow processes. These features can help you to set up our software to operate in ways that exactly match how members of your organization do their work. The features are menu-driven and easy to use.

In addition to reading the rest of this manual, we highly recommend that you read the *Getting the Most Out of Online Collaboration* PDF manual. The manual presents topics that go beyond management and configuration to discuss ways to create an inviting collaborative space, to best serve users, and to populate your zone to assist users in getting started, and other tips for maximizing the use of our product. In particular, we recommend that enterprise-level customers read the *Constructing a Workspace Hierarchy* chapter.

Chapter 3: Understanding Management Roles

When you begin using our software, there is only one management role: *zone manager*. By default, `wf_admin` (Forum) or the user who created the zone (WebWorkZone) is your organization's only member of the Administrators group. Members of this group have the right to perform zone management tasks. If you choose, you can add other members to this group, so that they can help to manage the zone.

Although it is possible to have members of the Administrators group manage everything, this strategy becomes problematic as the number of workspaces and forums grows. As mentioned elsewhere in this manual, you can delegate management for workspaces and for individual forums.

To delegate the management of a resource, you create a group, assign a user to the group, make that user the "owner" of the group (which enables him or her to add other members to that group), and use access control to assign management rights to the newly created group. (We recommend that you retain management rights for Administrators as a backup plan, and that you *do not* give the newly created group the right to modify access control.)

Using the process described in the previous paragraph, you can take advantage of other management roles. The following is a list of management roles and the default tasks that users in those roles are able to perform.

Site Managers (Forum only)

Primarily responsible for working with our software on the Forum host machine so that it runs smoothly. Tasks include updating the installation on the server, troubleshooting the internal processes of Forum, enabling e-mail for the system, and so on.

The management menu for site managers also includes all of the features available to zone and workspace managers.

Zone Managers

Primarily responsible for performing the initial setup of the zone (as described in the previous two chapters of this manual), managing users and groups, creating new workspaces, delegating management, customizing the zone workspace with templates, and assisting managers of discussion forums in the creation of initial custom commands and workflow processes.

The management menu for zone managers also includes all of the features available to workspace managers.

Workspace Managers

Responsible for creating and deleting forums in the workspace, determining which forums are displayed as part of the workspace, creating or deleting workspaces (you may not want to give workspace managers this right), viewing auditing information about the workspace, and customizing the workspace using templates.

Forum Managers

Responsible for managing a single forum. The responsibilities vary according to the type of forum being managed (discussion forum, calendar, or chat room). Managers access the management menu through the **Tools** toolbar item, and, in some cases, an **Administration** menu item. All forum managers can alter the access control for their particular forum to allow or disallow viewing, participation, and other tasks.

The management of a discussion forum is the most labor-intensive of all types of forum management. These managers are responsible for auditing activity, deleting or moving entries, defining global keywords for users, managing the schedule for e-mail notifications, creating custom commands, adding or removing folder columns on the folder page, defining workflow processes, customizing the forum using templates, running reports about folder content in the discussion forum, and managing posting to the forum using e-mail.

See the online Help system for more information about tasks performed by different types of managers or for information about customization using templates.

Chapter 4: Understanding Access Control

As mentioned in previous chapters, our software provides two methods for controlling access to various resources (such as the zone, workspaces, discussion forums, and so on).

The newest and most efficient method is called *role-based access control.* Role-based access control associates groups with a set of tasks. Role-based access control is available for workspaces, discussions, calendars, and chat rooms.

We also provide our legacy method for controlling access, called access-control list (ACL) tables. ACL tables require you to map individual rights directly to one or more groups.

The sections that follow provide additional information about each type of access-control method.

Role-Based Access Control

Role-based access control associates groups with a set of related tasks; together, this set of tasks defines a role. Each role grants the users in the associated groups permission (or rights) to perform each of the tasks in the set. Role-based access control simplifies and speeds access control, because it allows you to assign a broad, general level of access without having to understand and apply every right individually.

By default, Forum offers the following roles:

- Visitors ("read only")

  Can view information in the resource, but they cannot add new information or use other tools that are reserved for the higher-level roles.

- Participants ("write")

  Can view information, add new information (such as adding a topic in a discussion forum or adding a reply), and can use simple user tools (such as sending e-mail to another registered user)

- Managers ("administer," "modify," and "delete")

  Can peform the management tasks for the resource (for example, using the management menu, managing access-control for the resource, and creating additional resources such as workspaces), and using advanced tools (such as the ability to send e-mail to all registered users at once).

For new users of Version 7.0, this is the default method of access control for zones, workspaces, discussion forums, calendars, and chat rooms. Each type of resource defines the default list of tasks that comprise each of the three roles. (For example, Participants in a zone can view forums, send e-mail to registered users, and more; Participants in a discussion forum can add entries, reply to entries, and more.) Also, a few resources define additional, specialized roles (for example, the help-desk specialized forum includes a Help Desk Personnel role).

One of the most powerful features of role-based access control is the capability for a resource to inherit role definitions from its parent resource. So, for example, let's say that the zone manager associates groups with the three default roles, and let's say that the managers of all the child resources choose to inherit those roles. First, a manager can set up access control for a child resource easily, with a single mouse click. Second, changes to the role memberships that the zone manager might make are applied automatically throughout the inheritance hierarchy. So, continuing with the example, if the zone manager removes "Joe" from a group associated with Participants and adds him to a group associated with Visitors in the zone, then his role changes from "read and write" to "read only" through all workspaces and all forums in the zone.

> ***Note:*** *Inheritance is a choice provided as a convenience; individual managers can choose to define their own roles or to use the ACL tables instead of using inheritance.*

For additional assistance when working with the pages for role-based access control, click any of the blue "i" icons. Each icon provides just enough information to assist with using that section of the page.

Access-Control Tables (or "Managing by Rights")

ACL tables list groups in the leftmost column of a table (some of the "groups" are specially defined individual users), and they list the rights along the top of the table, as linked column headers. If a group of users has the right to perform a task, then in the group's row and the right's column, you see a check in the checkbox. To remove a right from a group, click on the checkbox to remove the check.

This method of access control allows you to assign an identical set of rights to users as does role-based access control. However, using this method, you must use the checkboxes in the table to group together similar rights on your own. It is more labor-intensive, and it does not offer the inheritance feature.

You can manage any set of resources in our product using this method of access control.

> ***Note:*** *If you upgrade to Version 7.0 of our software, ACL tables are the default method. To work with role-based access control, click on the* ***manage by roles*** *link, which is located toward the top of the ACL-table page.*

Users and Groups

By default, both methods of access control use a set of users and groups. (Most of these groups and users are for internal use only; however, by default, the zone manager can change the membership of the SSF Administrators group.) The default users and groups are as follows:

Registered Users
: Users who are registered and logged in.

Forum Creator
: The user who created this forum or workspace.

Forum Owner
: The user who owns this forum or workspace (by default, the same person who created the forum or workspace).

Anonymous Users
: Users who are not logged in.

Administrators
: By default, users who have the right to access the management menus in all resources in the zone. Initially, the only members of the SSF Administrators group are the `wf_admin` user and the user who created the zone.

Entry Creator
: The user who created an entry (such as a topic in a discussion forum).

Entry Owner
: The user who owns an entry (by default, the user who created it).

Chapter 5: Custom Commands and Workflow

The following sections provide a user scenario and an explanation of custom commands and workflow processes.

Understanding Custom Commands and Workflow Processes

You can create powerful, customized applications using our software's custom command and workflow process features. These features are menu-driven and easy to use.

A *custom command* is an entry in the discussion forum that collects and displays the type of data you want. You execute a custom command through the **Add** toolbar item. So, in addition (or in place of) the standard **Add** commands, you can define a custom command, such as "Add a Bid," "Submit Defect Report," or any phrase that applies to the work your users are doing.

A *workflow process* defines a set of states on an entry in a discussion forum, and defines the stages of an orderly and predictable process through which the entry must pass. For each state, the workflow process can define a specific set of users. For example, only the project manager can assign a task and mark it complete.

When you associate a workflow process with an entry, at any time, you are able to track the work done on the entry, knowing exactly what stage of the process the entry is in. Also, if the process is not complete, the workflow clearly defines who needs to take what action with the entry in order to move it along to the next step. Examples of workflow applications include (but are not limited to) a document review cycle, a sales account-management system for tracking leads, defect reports at a customer Help Desk, a resume-tracking system, and a purchase-order approval cycle.

You can create several workflows if your projects have different processes.

As one option, you can create an entry in a discussion forum and then initiate a workflow process for that entry. Or, you can create a custom command that automatically begins an associated workflow process as soon as someone executes the command.

We highly recommend that you experiment with custom commands and workflow processes, so that you understand how they work. The online Help system provides you with additional information, including exercises in the creation of a custom command and an associated workflow process.

After you gain an understanding of custom commands and workflow processes, you can then interview your users to see if you can use these features to automate any repetitive work.

If you require more customization than that offered by our menu-driven custom commands and workflow processes, you can use *templates*. With templates, your programmers can add HTML and other programming code to the template files to alter either the look of the page or the features. For additional information, see the online Help system.

Our software includes several prepackaged customizations that include workflow processes:

- Sales
- Resume
- Help Desk
- Document Review

You can use the wizards to create forums with these capabilities. To learn more about these predefined workflow processes, access the discussion forum's management tools menu, and review the underlying workflow definition. (For more information about how to do this, see the online Help system.)

A User Scenario for Workflow

Suppose that a supervisor wants to set up a simple project management workflow. The project manager is responsible for assigning and managing design projects.With SiteScape, the project manager can keep track of project assignments, the current status of tasks, and task completion and can monitor and flag those tasks which are potential problems.

In order to use SiteScape Forum for this work, the project manager must complete several major tasks:

1. Define the Workflow Process
2. Configure the Workflow Process
3. Define Transition Directives
4. Define Access Rights
5. Define Notifications
6. Define the Custom Command to Initiate the Workflow

Define the Workflow Process

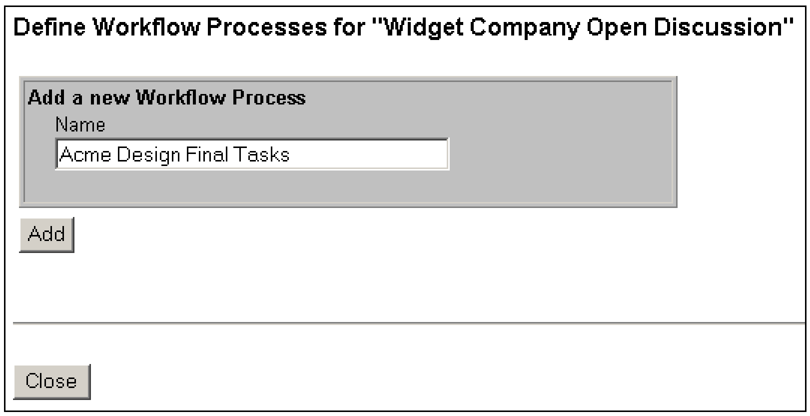
The project manager wants to track a list of tasks, their assignees, the status of the tasks at any one time, the access to this information, and notifications when a task is complete or overdue. The manager begins by analyzing the workflow process so he can configure the process using Sitescape software.

To define a workflow process, access the discussion forum and follow these steps:

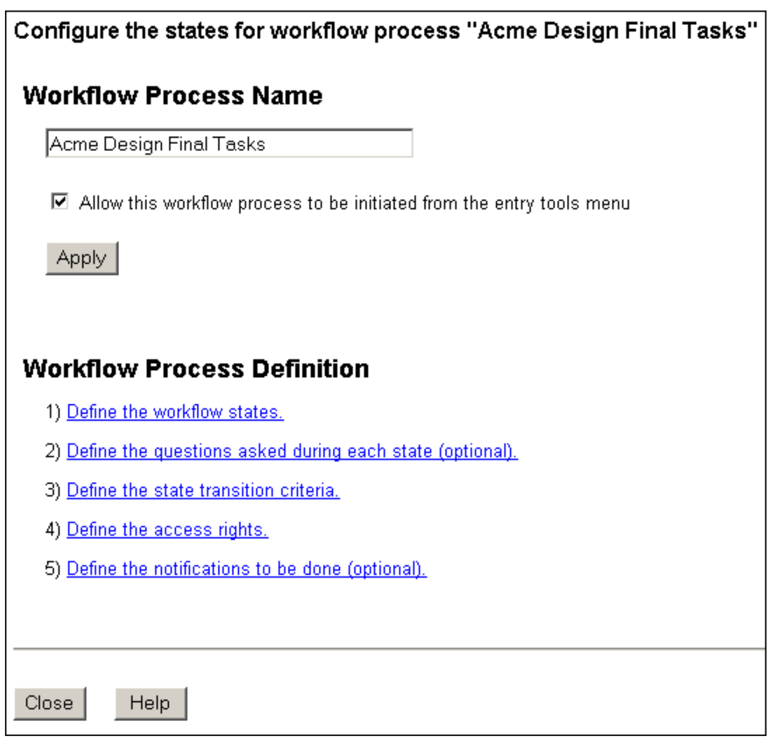
Tools > Administration

Navigation:	*Look for...*	*Click on...*
	Manage forum features	**Define workflow processes**

1. Navigate to this management page.
2. In the **Add a newWorkflow Process** text box, enter the project name, and then click on the **Add** button. .



The "Configure the states..." page appears.



3. Remove the check from the "Allow this workflow process to be initiated from the entry tools menu" checkbox, and then click on the **Apply** button directly below the checkbox.

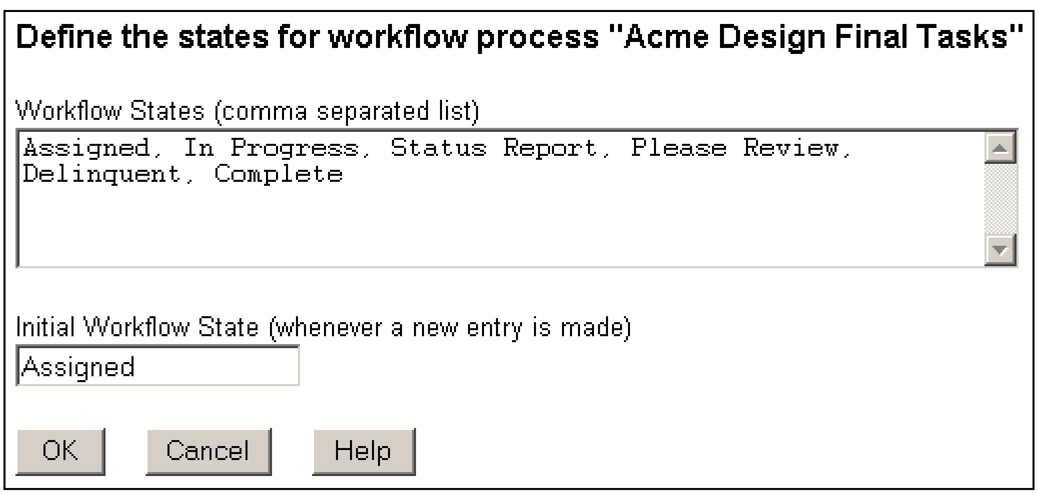
   This workflow process can be set up so that it is automatically initiated. This example does not allow users to initiate their own processes. (Checking this box places an item on the **Tools** menu that allows users to initiate the workflow process for any type of standard or custom entry that they create. The standard entries are discussion topics, documents, URLs, or survey questions.)

Configure the Workflow Process

The following instructions describe how to build a process for managing tasks from assignment to completion. The steps illustrate how to set up a workflow process but do not implement a robust, complete process (for learning purposes). Creating such a production-ready process requires more steps.

1. In the Workflow Process Definition section, click on the **Define the Workflow States** link**.**

   The "Define the states for workflow process" form appears.
2. In the Workflow States text box, specify the following states, separated by commas:
   - `Assigned`
   - `In Progress`
   - `Status Report`
   - `Please Review`
   - `Deliquent`
   - `Complete`



3. In the Initial Workflow State text box, type `Assigned`, since that is the first possible state.

   When a project manager enters a task, it is placed in this state. When the assignee starts to work on the task, the state must be changed manually to `In Progress`.

4. Click on the **OK** button to return to the "Configure the states..." page.

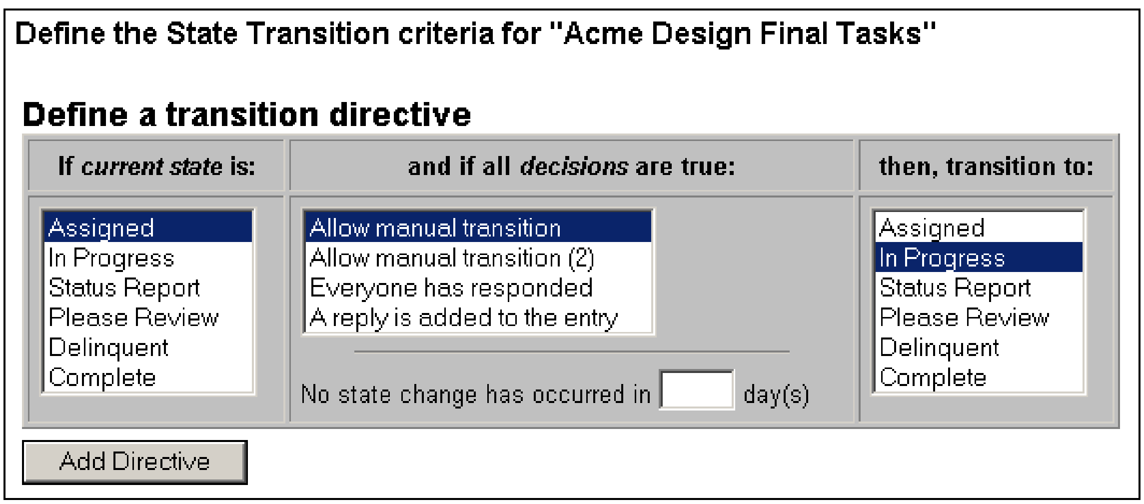
   You have now defined the states of the workflow process.

Note: *You can optionally* ***Define the questions asked during each state****. This is a step that helps you define when states must transition. In more advanced workflows, these questions may determine approval or disapproval of a state change when voting rules have been applied. For this exercise, this step is omitted. You can find more information in the online Help system.*

Define Transition Directives

Transition directives allow you to control how an entry moves from the current state to the next state. The states can be changed manually or automatically depending on the workflow definition. To define the transition criteria, do the following:

1. From the "Configure the states..." page, click on the **Define the state transition criteria** link. On the page that appears, the first table displays your choices for building transition directives.
2. If the current state is **Assigned**, allow a Manual transition to **In Progress**.



3. Click on the **Add Directive** button to display the decision in the **Transition directives** table.

   Once the manager has assigned the project, the assignee can respond that he is starting the task, and switch the state to **In Progress**. This way, the manager knows that the assignee is now working on the project. This directive allows the workers to move the entry manually through the states, as needed. This type of process requires a high level of trust that the Support workers know what they are doing and can move the entry through the process appropriately.

   SiteScape software also allows you to specify an automatic state change depending on someone adding a comment or reply or based on how specific users answer a question. For more information, see the online Help system.

Notice, in the previous picture, that the **Allow manual transition (2)** state is a second state that the project leader can use to assign an entry to a different transition state, and this state can have different access rights. For example, if the project leader allows the assignee to change the state from **Assigned** to **In Progress** manually, he can assign access to the assignee and the project leader. If however, he only wants the project leader to have the right to change the **Please Review** state to **Complete**, then he needs to assign a different set of access rights to this transition directive. By using the **Allow manual transition (2)** directive, he can assign the right for this transition only to the project leader. Different access rules can be assigned to the states so that one set of people can transition the entry to one set of states and another set of people can transition the entry to additional states.

4. Optionally, in the event that the project must be completed within a given time, you can specify that an unfinished task enter the **Delinquent** state when the time is up. Select **Assigned** and, under the transition criteria, enter the number of days in the **No state change has occurred...** text box, then click **Delinquent**. Finally click on the **Add Directive** button again. You can repeat this step for **In Progress**.
5. Continue to define the transition directives for subsequent states as follows:

Transition directives

State	Directives	Transition state
Assigned	Allow manual transition	In Progress
In Progress	No state change has occurred in 14 day(s)	Status Report
	Allow manual transition	Please Review
Status Report	A reply has been added to the entry	Please Review
	No state change has occurred in 7 day(s)	Delinquent
Please Review	Allow manual transition	In Progress
	Allow manual transition	Complete
Delinquent	Allow manual transition	In Progress
Complete		

6. Click on the **Close** button at the bottom of the page when finished with assigning transitions to states. The browser redisplays the "Configure the states..." page.

Define Access Rights

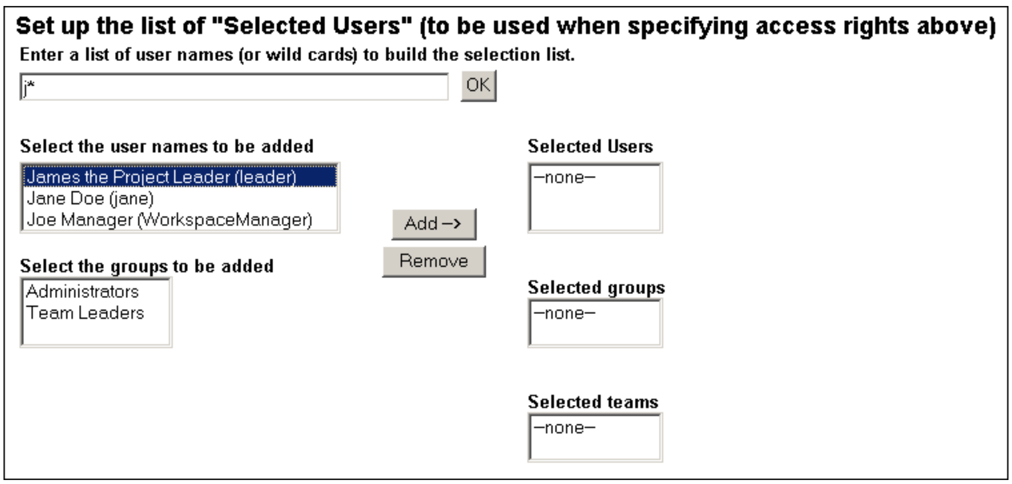
You can now specify who has access to view, modify, delete, respond to, or change the state of an entry in each state of the workflow process.

To define access rights, do the following:

1. From the "Configure the states..." page, click on the **Define the access rights** link.

   The table that appears displays the current access rights settings for each state. The workflow inherits the rights of those using the forum unless specified otherwise.

2. Use the **Set up the list of Selected Users** sections at the bottom of the page to determine the list of users who have the right to view and work with Project Management.

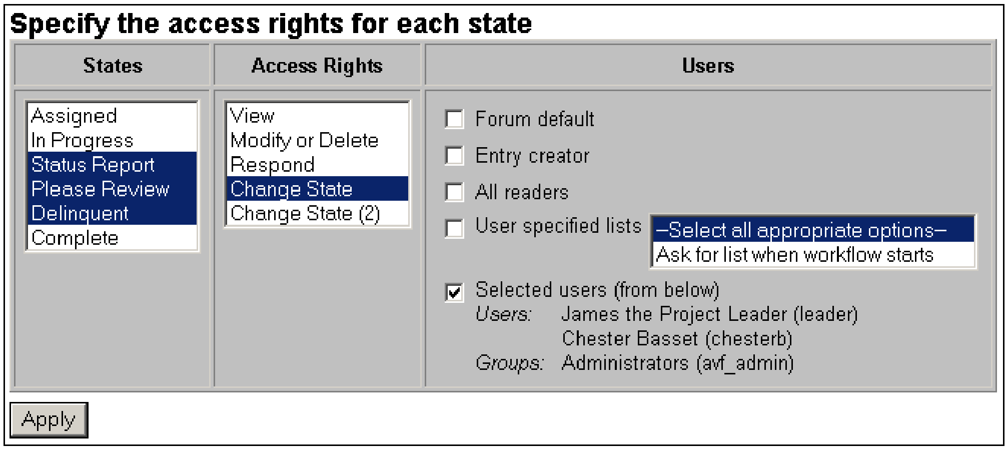


Do the following to set up this list:

- If you have a small number of registered users, type an asterisk (*) in the "Enter a list of user names" text box, and then click on the **OK** button to the right of the box. If you have a large number of registered users, then manually type into the text box the names of the Support workers whom you want to have access to the project, and separate each name with a space.
- In the "Select the users to be added" box, press and hold the Ctrl key, click on each of the usernames of the people who have the right to work with Project (the usernames of the Support workers), and release the Ctrl key. All of the usernames you clicked on should be highlighted. Then, click on the **Add-->** button. This places the highlighted usernames in the Selected Users text box.

  Ctrl+clicking is the method used on Windows systems for selecting multiple items in a list. Use the method supported by your system.

3. View the middle table, which is the "Specify the access rights for each state" table. In the rightmost column, toward the bottom, under the "Selected users" checkbox, you see the list of the names you chose.



4. If the project manager does not want everyone to able to administer the manual parts of the workflow, access rights can be set on each state. For example, so that employees with delinquent items cannot change states themselves, the project manager can specify that only he/she can change the workflow state for those tasks in the **Delinquent** state, with (as the example shows) the Administrators for backup.
5. Click on the **Apply** button, then repeat this process for **Status Report** and **Please Review**. (You can change all three states at once by Ctrl+clicking on the states you want to change.)
6. As you set the access rights for the users, the states and their access settings are displayed in the **Current access rights settings for each state** table, located at the top of the page.

Define the access rights for workflow process "Acme Design Final Tasks"

Current access rights settings for each state

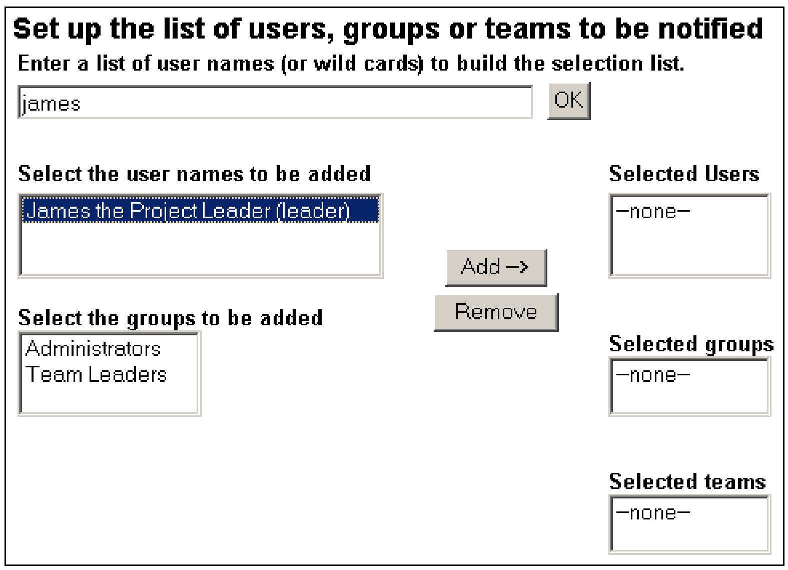
State	Access Rights				
	View	Modify or Delete	Respond	Change State	Change State (2)
Assigned	Forum default	Forum default	Forum default	Forum default	Forum default
In Progress	Forum default	Forum default	Forum default	Forum default	Forum default
Status Report	Forum default	Forum default	Forum default	James the Project Leader (leader)	Forum default
Please Review	Forum default	Forum default	Forum default	James the Project Leader (leader)	Forum default
Delinquent	Forum default	Forum default	Forum default	James the Project Leader (leader)	Forum default
Complete	Forum default	Forum default	Forum default	Forum default	Forum default

7. Click on the **Close** button at the bottom of the page to return to the "Configure the states..." page.

Define Notifications

To define the notification when a state change occurs, from the **Define the Workflow States** page**,** click on the **Define Notifications to be Done** link. This is an optional step, but in this project management workflow, it is an important step.

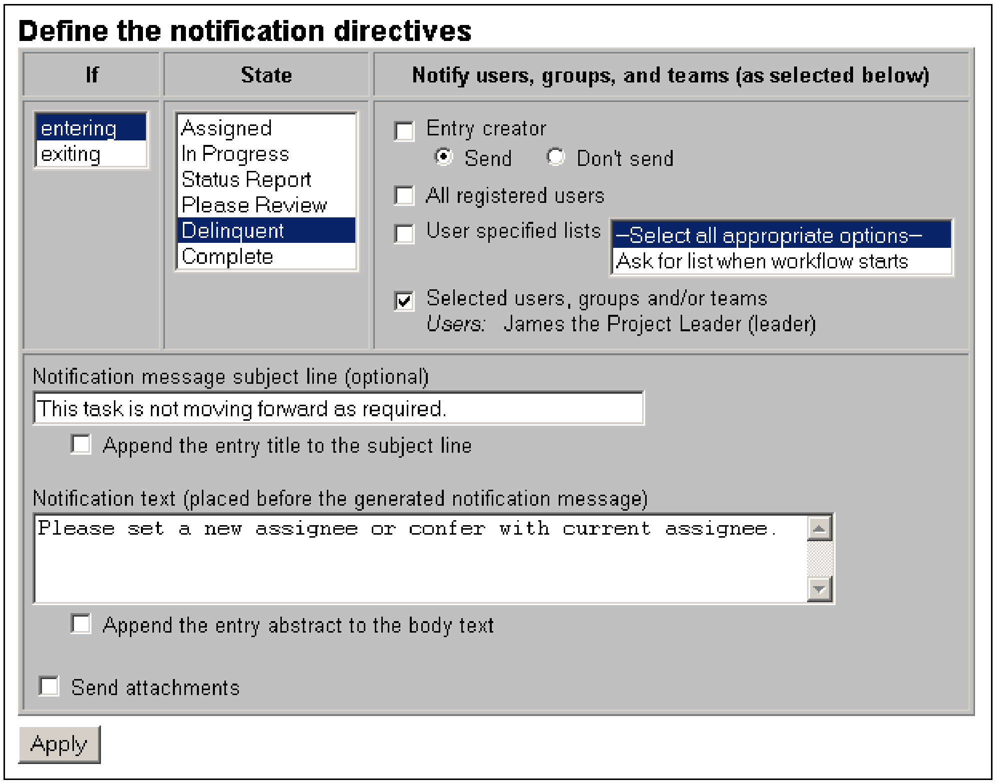
1. Click on the **Define Notifications to be Done** link**.**
2. On the "Define the Notification Directives" page, scroll down to the "Set up the list of users..." section, where you can specify which users and groups receive notification when an item's workflow state changes.



3. Enter the project manager's name in the search text box (the first box in this section), or search for the name using an asterisk (*).
4. Click on the **OK** button.

   The name appears in the "Select the user names..." text box.
5. Select the username, and click **Add** to move the name into the **Selected Users** text box.

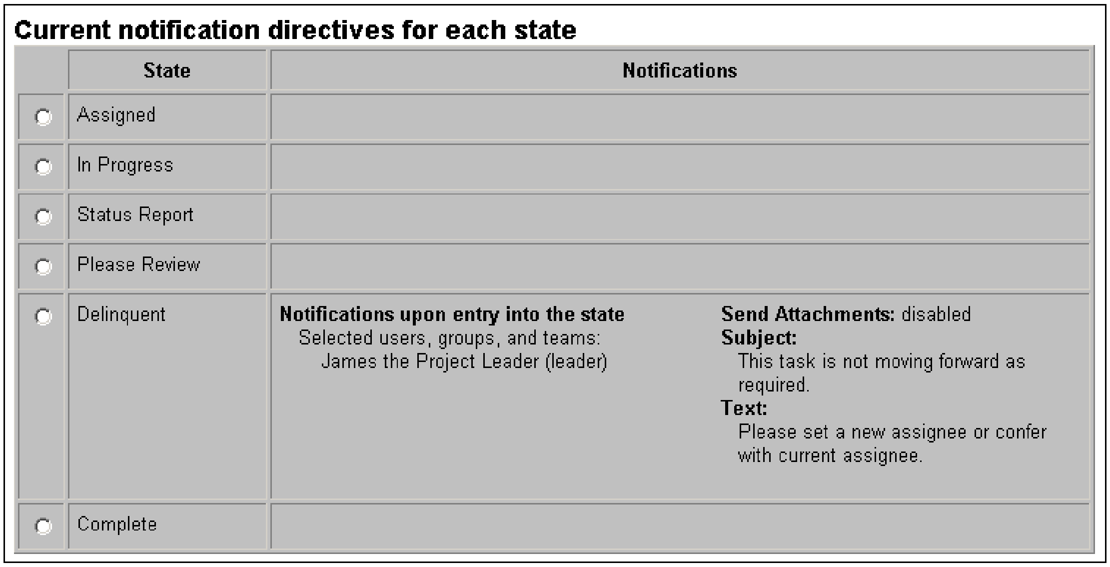
Once you have selected users to receive e-mail notifications, the names appear in the **Define the notification directives** table, in the right column, below the "Selected users..." checkbox.



6. Select **entering**, then **Delinquent**, and click on the checkbox for the selected user. The user name is displayed below this checkbox.
7. Enter the e-mail header in the next field. For example, you might enter: *This task is not moving forward as required.*
8. Enter the complete message in the next field.

   A link to the item is automatically included within the e-mail to enable a quick evaluation on the project.
9. Click on the **Apply** button.

The information about the **Delinquent** state notifications now appears in the **Current Notification Directives** form, at the top of the page.



Current notification directives for each state

	State	Notifications
○	Assigned	
○	In Progress	
○	Status Report	
○	Please Review	
○	Delinquent	**Notifications upon entry into the state** Selected users, groups, and teams: James the Project Leader (leader) — **Send Attachments:** disabled **Subject:** This task is not moving forward as required. **Text:** Please set a new assignee or confer with current assignee.
○	Complete	

You can assign subsequent notifications for each state based on the entering or exiting action. For example, the administrator may want to know when a task is in jeopardy. Assigning **Delinquent** as a notification directive is important to the person responsible for tracking delinquencies.

With the notification step finished, the administrative setup is complete. The workflows can be exported and imported and used as the basis for other workflow processes.

Define the Custom Command to Initiate the Workflow

Using the discussion forum's management tools, you can now define a custom command to initiate the Project Planning workflow.

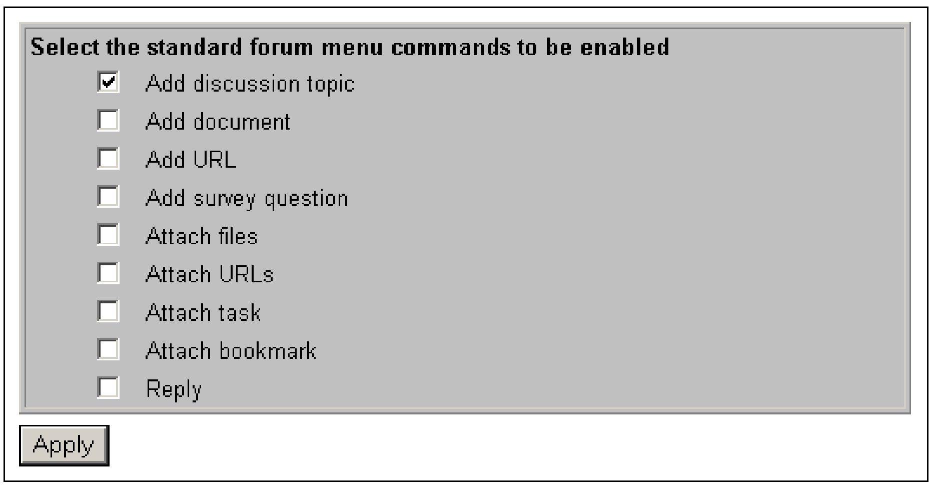
To define a workflow process, access the discussion forum and follow these steps:

Tools > Administration

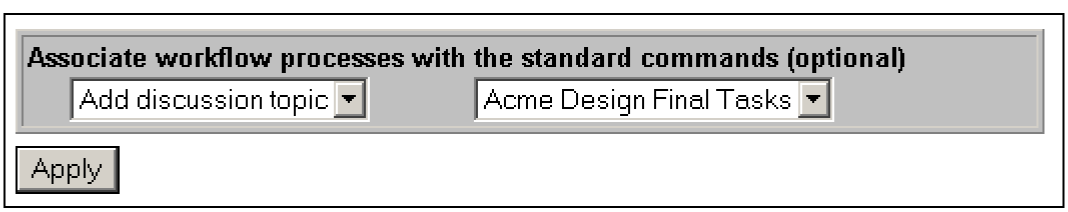
Navigation:

Look for...	*Click on...*
Manage forum features	**Add or modify forum commands**

1. Navigate to this management page.
2. Deselect all the form commands and leave **Add Discussion Topic** checked.

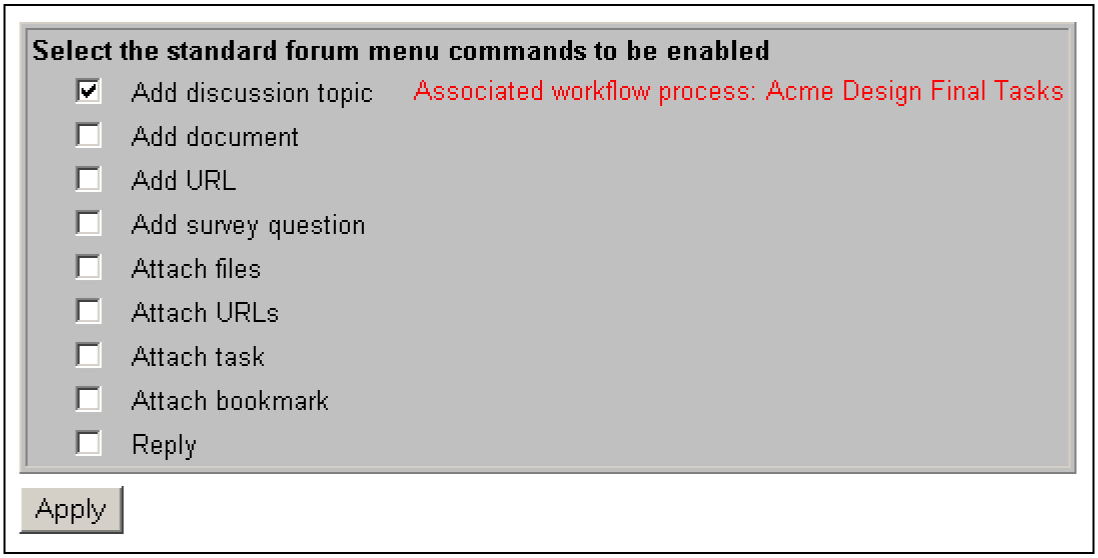


3. Click on the **Apply** button.
4. At the bottom of the page, associate the workflow process with the custom command.



5. Click on the **Apply** button.

6. The **Add Discussion Topic** command is now associated with the **Acme Design Final Tasks** workflow.



More Help About Custom Commands

To read more information about custom commands, do the following:

1. Click on a **Help** button.
2. Click on the **Manager Help** button in the toolbar.
3. Click on the **Discussion Management** link in the table of contents.
4. In the table of contents, click on the **Create Custom Commands** link.

More Help About Workflow

To read more information about setting up workflow processes, do the following:

1. Click on a **Help** button.
2. Click on the **Manager Help** button in the toolbar.
3. Click on the **Discussion Management** link in the table of contents.
4. In the table of contents, click on the **Define Workflow Processes** link.

Chapter 6: Creating Additional Workspaces

As your users learn about our software, they are likely to request that you create spaces for subgroups within your organization to do specialized or more private work. For example, the engineering department may decide that it wants its own dedicated workspace. As another example, a team may request its own discussion forum.

Gather Information from your Users

When responding to these requests, we recommend that you ask yourself the following questions as part of the decision-making process.

Is the group that is making the request a subset or superset of my zone's users?

An example of a subset is the engineering department within the WidgetCo organization. An example of a superset is a request to have a workspace accessible to both WidgetCo employees and their customers (as in a customer support center).

If the group is a superset of your zone's users, you need to create another zone. If the group is a subset of your zone's users, your decision-making process continues with the following questions.

Can the group's needs be met within a pre-existing discussion forum?

If the group is very small and the need can be met solely by the discussion forum, consider giving the group its own subfolder in the larger discussion forum. For example, a project team can have its own folder within an engineering discussion forum. If the need cannot be met within a pre-existing discussion forum, proceed to the next question.

How big is this group and how active are they in their use of the software? How many groups are asking for space?

If the group requesting the space is small or uses the software infrequently, consider creating a few forums for the group. For example, you can create a discussion forum, a calendar, and a chat room that is visible and accessible only to members of the group. When members of that group view the workspace page, they can see and access the group's forums. When other users view the workspace page, they cannot see links for the group's forums (thus the page is not cluttered with resources that they cannot access).

If only a few groups ask for space, the solution described in the previous paragraph works well. If many such groups ask for space, then the workspace page may begin to look too crowded to the zone manager (remember, the zone manager can view all of the zone's resources). If this begins to happen, it may be time to create additional workspaces and move the forums to those separate areas. The primary reason for creating a new workspace, in this instance, is solely to make the manager's job easier.

Finally, if the group is very large and very likely to be active, consider creating a new workspace right away. For example, let's say that the WidgetCo company's engineering department is large, is experienced with online collaboration, and has ideas for multiple discussion forums. This is a situation that calls for the creation of a separate workspace.

As a final point to consider, if you work for a very large organization, we do *not* recommend that you automatically create a workspace for every subdivision in your organization. We make this point because using workspaces to mirror your organizational chart creates a very complex-yet-empty structure that is intimidating, especially to new computer users. In addition, workspaces that mirror organizational charts may not be what your users need. For example, the engineering department may use our software enough to warrant its own workspace, but the sales department may be happy with a dedicated discussion forum in the zone workspace. It depends on the size of the group and the volume of the activity.

Remember that you lose nothing if you start small (with a dedicated folder within a pre-existing discussion forum) and move to larger and larger spaces. Our software provides managers with tools for moving entries and forums.

In addition to reading the next section, which describes how to create a child workspace, we highly recommend that you read the *Getting the Most Out of Online Collaboration* manual. This manual presents topics that go beyond management and configuration, and provides ways to create an inviting collaborative space, ways in which your zone can best serve your users, ways to populate your zone to assist users in getting started, and other tips for maximizing the use of our software. In particular, we recommend that enterprise-level customers read the *Constructing a Workspace Hierarchy* chapter.

Creating a Child Workspace

When you create a new workspace, it is called a *child*. A child workspace is related to the current workspace in the same way that a subfolder is related to a folder. When you create workspaces, you form a workspace hierarchy within your zone.

If you are a member of a small organization, you can create workspaces as needed by your users without much prior planning. However, if you are a member of an enterprise (very large, possibly global) organization, we highly recommend that you read the *Getting the Most Out of Online Collaboration* manual, because it is helpful to plan hierarchies for enterprises before you create new workspaces.

As a broad overview, here are the steps required to create a child workspace:

1. Create a group, and, after you create the workspace, use access control to assign the newly-created group a “local managers” role for that workspace.
2. Create a user group, as desired.
3. View the workspace that you want to be the *parent* workspace.
4. Create a workspace, which appears “under” the parent in the workspace listing.

Chapter 7: Next Steps

You can find more information in our online Help system.

To use the management Help system, do the following:

1. Click on any **Help** button.
   Our software displays Help in a separate window.
2. In the Help window, click on the **Show Help topics for managers** link, located at the top of the left frame.

Our software's Management Help system contains information about the following topics:

- Using the zone workspace administrative tools menu
- Managing individual forums
- Using templates and other customization methods
- (Forum only) Architecture, system tuning, and troubleshooting information

In addition to the reference material contained in the online Help system, we highly recommend that you read the *Getting the Most Out of Online Collaboration* manual. (To access the manual, open the Help system, and in the upper-left corner, in the table of contents, click on the **Getting Started Manuals** link.)

The *Getting the Most Out of Online Collaboration* manual presents topics that go beyond management and configuration, and addresses ways to create an inviting collaborative space, ways in which your zone can best serve your users, ways to populate your zone to assist users in getting started, and other tips for maximizing the use of our software. In particular, we recommend that enterprise-level customers read the *Constructing a Workspace Hierarchy* chapter.

For support assistance, help in developing your customizations, or additional documentation, please access SiteScape's support, customization, and help forums:

Support: http://support.sitescape.com/forum/support/dispatch.cgi/wwzsupport

Help: http://help.sitescape.com/

Customization: http://support.sitescape.com/forum/support/dispatch.cgi/custom

The discussions in these forums, particularly in the customization forum, give you an idea of how other customers are using Forum and WebWorkZone and how our software may be able to assist your organization.

Index