User Guide

SiteScape Forum

SiteScape WebWorkZone

This manual provides instructions to assist you in using our product quickly and productively.

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Table of Contents

About This Manual v

What is in This Manual? v
What are the Conventions? v
Forum Activities v
Where Can I Get More Information? vi

Getting Started 1

In this Chapter 1
Register and Log in 2
View the Workspace 3
Navigate the Workspace 4
Use the Discussion Forum 4
Add a Topic 5
The Wysiwyg Editor 5
Add a Reply with an Attached Document 6
Enable Notifications 7

About Forum 9

In This Chapter 9
What are Forums? 9
What are the Forum Tools? 11
“My summary" Page 12
Initialize or Modify the "My summary" Page 13

Common User Tasks 17

In This Chapter 17
Search for an Entry 17
Use Special Operators to Narrow your Search 19
View New or Modified Entries 20
Manage Entries 23
Delete an Entry 23
Delete a Reply 24
Use Bookmarks 25
Add a Bookmark 25
View a Bookmark 25
Use Tasks 26
Add a Task or Reminder 26
Associate a Task with a Discussion 26

Complete a Task or Reminder....27
Edit a Task or Reminder....27
Delete a Task or Reminder....28
Use the Calendar....29
Viewing Your Personal Calendar....29
Viewing a Specific Day....30
Scheduling an Appointment....30
Scheduling a Repeating Appointment....31
Merging Calendars....32
Modify Information in Your User Profile....33

Co-Authoring a Document....35

In This Chapter....35
Co-author the Modifiable Document....35
Modify the Attachment....37
Modify an Attachment Locally....38
Reserve-and-Release Method....39
Co-author Using the Document-Review Process....39
Add the Document Review Process to an Entry....42

Workflow with a Sales Lead Forum....45

In this Chapter....45
What is Workflow?....45
Custom Entries....47
Customized Discussion Forums....47
Sales Leads Account Scenario....48
Sort Entries....48
Add a Sales Account Card....49
Add a Note....50
Daily Update of Tasks and Reminders....50
Filter Entries....51
Create Personal Filters....52
Generate a Report....52

Glossary 55

Index 61

About This Manual

This chapter provides introductory information about using this manual.

What is in This Manual?

This manual provides first-time users with conceptual information and brief instructions on tasks necessary to begin using our product quickly and effectively.

Each task-related chapter begins with a description of the task (what it is, what it accomplishes, and why you might want to do it). Subsequent sections contain the actual steps you must perform in order to complete the task.

You can find a glossary of terms at the end of the manual.

What are the Conventions?

This manual employs the following conventions:

What you see	*What it means*
SiteScape Forum	The name of the installed product, as well as, the web-hosted WebWorkZone
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...	New terms are presented in *italic* font when they are first defined.

This manual includes screen captures that illustrate how to perform various tasks. The screen captures apply to both the SiteScape Forum product and WebWorkZone.

Forum Activities

Forum enables you and other uses to participate in a variety of online collaboration activities, including the following:

- Collaborating with teammates and organizations across the Internet to achieve a goal
- Co-authoring a document

- Creating your own online team space to collaborate on a project
- Scheduling meetings synchronized with your Outlook calendar
- Receiving e-mail notifications about recent activities in a forum that interests you
- Generating reports based on data in a forum
- Using Tasks and Bookmarks

Some of these activities are discussed in this manual. Some features may use a Java-based program that requires you to install JRE 1.4.1. The first time you use the new program, such as the editing applet, you are prompted for this installation. Agree to the installation on your machine if your company policy allows this. Otherwise, there are non-Java-based features available.

Where Can I Get More Information?

You can find more information in the SiteScape Help system.

To access the Help system, click on the **Help** item located at the top of the page.

Help information appears in a separate browser window. You can find introductory information in the “Getting started” section at the bottom of the right frame of the Help page. To view information about a specific part of Forum or WebWorkZone, click on its title in the left frame.

In addition to the toolbar item, many SiteScape web pages include context-sensitive Help available from the **Help** button at the bottom of the page.

Chapter 1: Getting Started

SiteScape Forum (Forum) is a collaboration tool that provides an effective way to communicate, collaborate, and share resources with different groups of people across the Internet. You can access SiteScape Forum in two ways:

1. As SiteScape Forum installed and hosted through your company's servers.
2. As WebWorkZone (WWZ), which is a hosted service from SiteScape

In either case, the functions and features are identical.

Using SiteScape Forum, you can work across companies, within a small work team, within an organization, within a company, or across the Internet.When you collaborate using SiteScape, you bridge the gap between working alone at your computer and working together in meetings with your co-workers. Forum and WebWorkZone create an online "virtual meeting space. When you log in, you become part of the larger organizational picture.

In addition to fostering an open exchange of ideas and information, Forum and WWZ record and thread each user's contributions, thus creating an invaluable reference source of your company's work. Through the search mechanism, you can locate items quickly within this reference source.

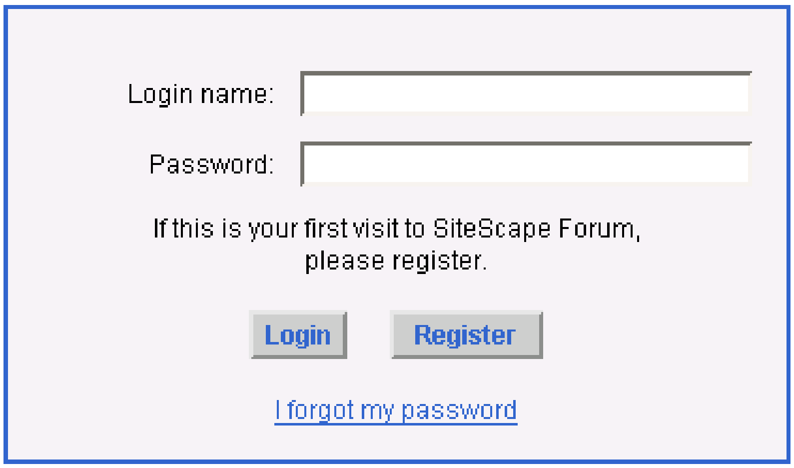
In this Chapter

This chapter offers instructions for performing the following common tasks:

What you need to do	*Why you want to do it*
Register and Log in	rTo become an active participant in the discussion forums, you must register with a username and password.
View the Workspace	As you become familiar with the layout of the workspace, you feel more comfortable using Forum.
Navigate the Workspace	Learning to navigate Forum lets you find discussions, users, and documents quickly.
Add a Topic	To participate in a forum, you might add a discussion topic.
Add a Reply with an Attached Document	Users can add attachments when adding a reply to a topic.
Enable Notifications	Forum can alert you by e-mail when there has been recent activity in a forum.

Register and Log in

The Forum administrator should publish the URL you use to access SiteScape Forum. With your favorite browser, enter the URL in the address text box. When Forum is displayed, the Login box appears where you first have to register as a user.



You can view forums as an anonymous user without logging in, but not all features and forums are available to you. As a registered user, you can participate in the forums to which you have access.

A registered user has a username and a password. By default, you can register yourself, but some installations of Forum prohibit access by anonymous users or request that you contact a manager in order to register.

To register as a first-time user, do the following:

1. From the Forum workspace page, click on the **Register** button in the Login box. In the "Login name" box, provide a name, which can contain only numbers, letters, underscores (_), dashes (-), periods (.), or "at" symbols (@). Names cannot include dashes as the first character in the name, and cannot contain spaces. The following is an acceptable name:

    ```
    schroeder_b
    ```

    Usernames are case-sensitive. When you log in, you need to specify the same upper- and lowercase letters that you specify here. (However, Forum does not allow duplicate names that differ only by case. For example, if there already exists a user "Peter", then you cannot register the name "peter".)
2. In the "Full name" box, provide a name that Forum can apply to entries that you create. For example:

    ```
    Schroeder Beet
    ```
3. Enter a password, and verify the password by re-entering it.

Passwords are also case-sensitive.

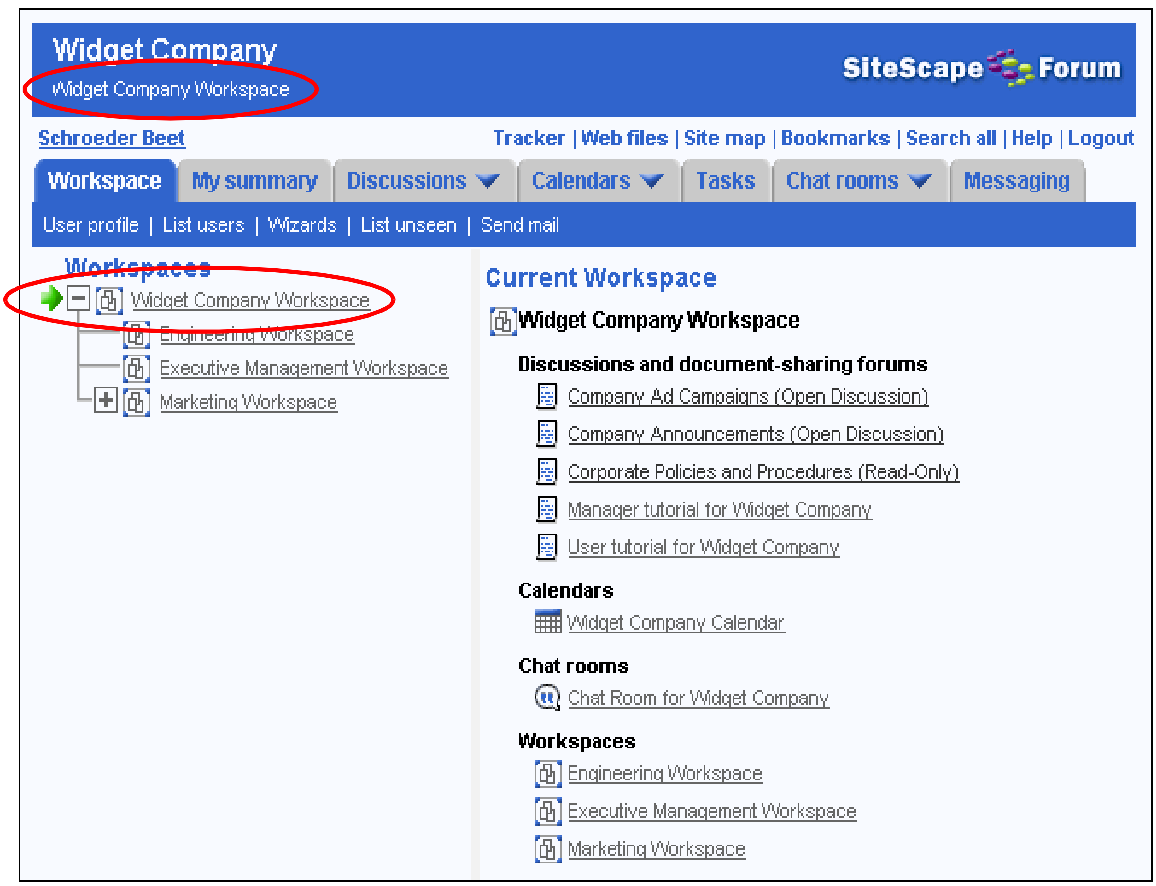
The remaining items on the form are optional. Provide values for as many of them as you choose. SiteScape recommends that you provide an e-mail address. If you do not, you cannot receive notifications or send e-mail using Forum.

Remember your username and password so that you can provide them to Forum the next time you log in.

View the Workspace

A *workspace* is a collection of summary pages and forums that one group uses to work toward a common goal. In Forum and WebWorkZone, the default workspace is called the *zone workspace*. It is the workspace that is common and accessible to all people in your organization. If your manager creates additional workspaces, you may be a member of more than one workspace.

After you log in to Forum, the welcome page appears. Your welcome page may look somewhat different if your manager has made customizations to the workspace, but a typical welcome page appears as follows:



You can locate the name of your current workspace in the upper-left corner of the page. Your current workspace is also marked with a green arrow in the Workspaces list in the left column.

Navigate the Workspace

You can navigate the workspace by clicking on the Workspace tab. SiteScape software displays the hierarchy of workspaces and sub-workspaces (child workspaces) in the zone. The displayed hierarchy is very similar to that of a standard file-access software program.To view a workspace, click on its title on the page. The green arrow indicates your current workspace.

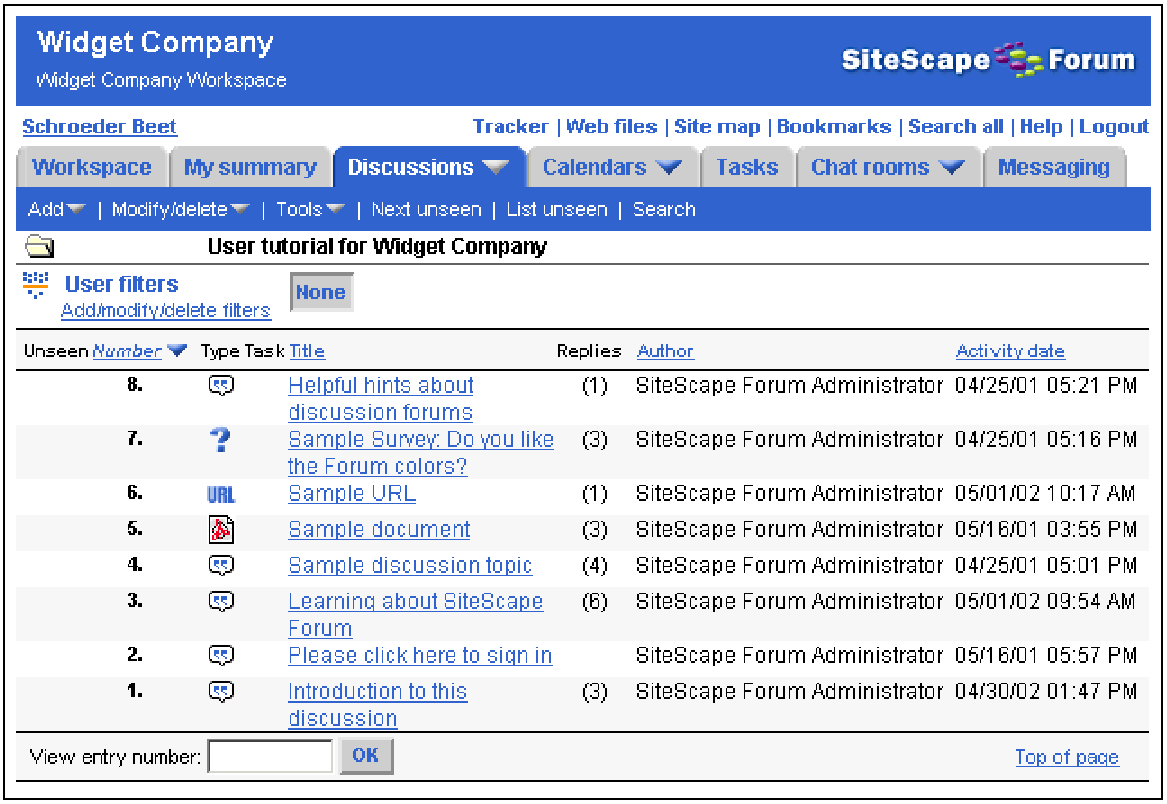
A workspace can have a plus sign (+) next to it, indicating that it has at least one *child* workspace. (A child workspace is subordinate to a higher-level or *parent* workspace, in the same way that a subfolder is subordinate to a higher-level folder.) You can click on the plus sign to view child workspaces, or click on the minus sign (-) to hide them.

On the right side of the Workspace page, you can see a list of all the *forums* to which you have access in that space. The Widget Company Workspace has several discussion forums, one calendar forum, and one chat forum.

Use the Discussion Forum

You can view a discussion forum by clicking on its title on the right side of the Workspace page. You can also click on the **Discussions** tab to view a drop-down list of discussions that you can access. Then, click on the title of the discussion you want to view.

Your zone or workspace manager gives discussions their titles when they are created. Forum displays the top folder of the discussion you chose and lists the folder's entries (discussion topics and replies, documents, and more).



In a discussion, information is organized in folders. Folders can contain subfolders, which in turn can contain subfolders, and so on.

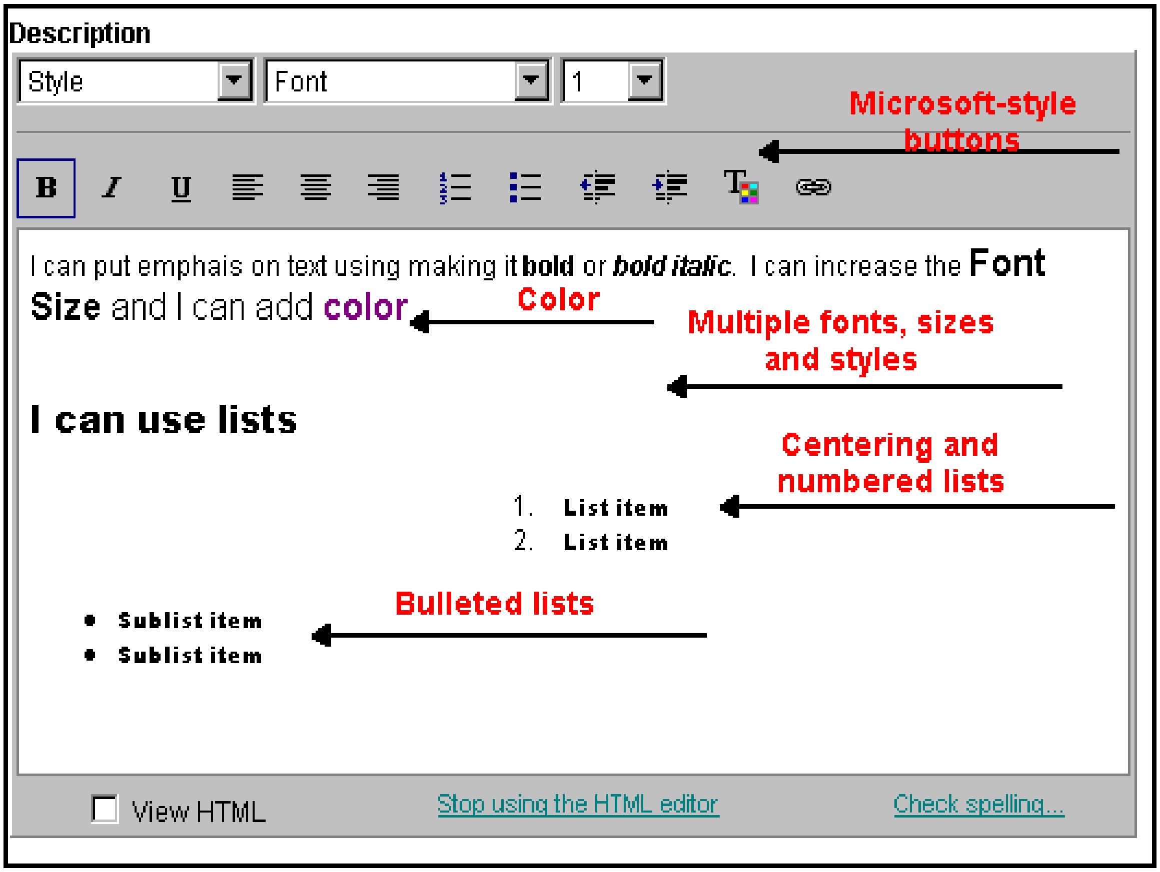
Add a Topic

Once you have entered the discussion forum, and viewed the topics, you can also add topics to the discussion forum. View the folder listing and click on the **Add** toolbar item on the left side of the toolbar. The software then displays a drop-down menu of entry types, such as discussion topics, document, URLs, and survey questions. Click on one of the entry types in the menu to add an entry.

The Wysiwyg Editor

To enter the new topic in the forum, you can use the default HTML editor, which contains many familiar features. You can copy and paste your Microsoft Word or Excel files right into the editor, and it retains the formatting. This editor requires the Java Plug-in 1.4.1. If the prompt to install the plug-in comes up, then you do not have it installed on your machine. Choose to install according to your company policy.

You can also use the HTML editor to enter straight HTML into the editor, however, you must be sure to end all the tags appropriately, or it can cause formatting problems when the topic is displayed in the forum. This HTML editor does not support scripts.



Add a Reply with an Attached Document

When reading an entry in a discussion forum, you may decide to add a response. To add a reply to a discussion entry, do the following:

1. In the discussion forum, view a discussion topic that interests you by clicking on the topic's title in the folder listing.
2. Click on the **Add** toolbar item on the left side of the blue toolbar.
3. In the displayed menu, click on the **Reply** link. The software displays the "Add reply to..." form.
4. In the "Title" text box, specify a descriptive title for your reply (such as "New Hire report for review").

   Enter the text of your reply in the "Text" text box (for example, "This report details the plan for new hires in the coming year. Please review and add your comments to this topic by November 12.").

You do not need to sign the reply, because Forum automatically includes a signature line. The signature line includes the full name you gave when you registered, and the date and time you entered the discussion topic.

5. At the **Attach a file** entry box, use the **Browse** button to find the file on your computer.
6. Click on the **OK** button located at the bottom of the page.

   The title that you provided in the "Title" text box now appears as the last entry in the list of replies to that discussion topic.

In addition to placing your response at the end of the reply chain, you can reply to any reply that interests you by placing your response in the middle of the chain. To do this, click on the title of the reply to which you want to respond, click on the **Add** toolbar item, and click on the **Reply to this reply** link. Forum then places your response in the reply chain directly after the reply you chose.

Enable Notifications

Forum can send you notifications through e-mail about recent additions or modifications to entries in a discussion forum.

Note: *To receive e-mail notifications, your registration information must include your e-mail address.*

The e-mail notifications feature is one of several methods that you can use to keep track of new or modified information. There is no right or wrong way to track recent activity; try the various methods, and choose the one that best fits your working style.

By default, in order for you to receive e-mail notifications for a particular discussion forum, that forum's manager must specify your username or a group to which you belong in the forum's distribution list. If your forum manager does not do this, you do not receive e-mail notifications for that particular discussion forum.

To override the manager's settings and to ensure that you receive e-mail notifications for a particular discussion, do the following:

1. Click on the name of the discussion forum you want to track using e-mail notifications.
2. Click on the **Tools** toolbar item, located on the left side of the blue toolbar.
3. In the displayed menu, click on the **Set Notification** link.

   Forum displays the "Notification for..." page.
4. Click on one of the following Enable E-Mail Notification checkboxes:
   - Use Forum Default E-mail Notification (Default)

     This option allows you to receive e-mail notifications about activity in this discussion forum only if your manager specifies your name or a group to which you belong in the discussion's distribution list.
   - Disable E-Mail Notification

This option disables e-mail notification for this discussion. This setting overrides settings made by the discussion-forum manager. So, if you click on this checkbox and if your name is on the discussion forum's distribution list, you do not receive e-mail notifications.

- Enable E-Mail Notification (Digest Style)

  This option indicates that, periodically, according to a schedule set by your discussion-forum manager, you receive one e-mail message with summaries of all activities in the discussion forum since the last time you received a notification. This setting overrides settings made by the discussion-forum manager.

- Enable E-Mail Notification (Individual Message Style)

  This option indicates that, periodically, according to a schedule set by your discussion-forum manager, you receive an e-mail message for every new or modified entry. Your e-mail notification also includes any files attached to the forum entry. This setting overrides settings made by the discussion-forum manager.

5. Click on the **OK** button.

E-mail notifications contain links to one or more new or modified entries. When you click on the link in the e-mail message, it invokes your browser (if it is not currently running) and displays the entry.

Note: *Mail notifications are sent out according to the schedule set by the Forum manager.*

Chapter 2: About Forum

Forum contains information organized in a hierarchical fashion. The information is available to you if the forum administrator has given you authorization. You access all of the information through the web address that is provided by your Forum administrator. The administrator also supplies you with a username and password to access the discussions groups.

In This Chapter

This chapter offers information on the following topics:

Topics	*Description*
What are Forums?	Defines the types of forums available and how to use them.
What are the Forum Tools?	Describes the various tools and aids available to better use forums.
“My summary" Page	Helps you set up “My Summary” to display information about recent activities in the forums that interest you most.

What are Forums?

Forums are applications that enable you to communicate and collaborate with your teammates. Some forums are optional, and administrators can decide to make the forums available or not. For example, some companies never enable the Chat feature because of company policy.

Some of the Java-based features that Forum provides require that you install a Java Plug-in on your local machine. If your company policy does not allow the installation of that software, you can still use the web-based alternate features.

The forums include the following:

Discussions

Provide access to threaded discussions, documents, URLs, and surveys. Threaded discussions are posted notes in the form of topics and replies to topics. Discussion forums provide a dynamic place in which you can combine information (files, plans, documents, URLs) with discussions about that information (replies and surveys).

When a discussion entry is finished, Forum contains a snapshot of your work. When a new member joins your team, that new member can review discussion entries to understand the way that documents were developed, the logic behind decisions, and other important historical data about your project.

Calendars

Provide you with a mechanism for tracking your appointments. Workspace calendars (such as the Widget Company Calendar) are accessible to all of the users in a workspace. Individuals can create personal calendars when they register or modify their user profile.

Tasks

Provide you with an automated way to keep track of your work. You can assign tasks and reminders to yourself or other users. You can also associate a task with a discussion-forum entry. In this way, the entry can provide documents or discussion replies that can assist in the completion of the task. Forum software can notify assignees when a task is assigned, almost due, or overdue. In addition, you can reuse ("restart") your old tasks, and save time entering task details.

Chat Rooms

Provide you with the ability to create synchronous collaboration in the form of chat sessions. In a chat session, everybody participates at the same time. You reply to another person’s comment by clicking on it. As each person submits a comment, the software displays the comments in the order in which they were submitted and notes which “thread” a comment is replying to.

When the chat session is finished, your chat resource manager can make the chat session *inactive* to show that the conversation has been completed. Forum software makes transcripts available for future reference. You can view a transcript of all comments in the order in which they were made, or you can view a transcript that "threads" the chat session, placing replies indented under the comments to which they are replying.

Messaging Window

Provides you with a way to have a private chat with another Forum or WebWorkZone user. The messaging window is very similar to a chat session. However, it is designed for a smaller number of users (optimally, one-on-one), and for briefer, less important discussions (transcripts are not saved by default).

Summary pages

Summary pages provide a concise display of summary information about your workspace or about forums that are important to you.

Workspace page

Provides a list of all of the forums and personal pages available to a user in the current workspace. To access a forum or personal page, you can click on its title on the Workspace page. (You can also click on a grey tab and then choose a forum from the drop-down list.)

A workspace is a collection of summary pages and forums that one group uses to work toward a common goal. Consider workspaces to be online office spaces. Just as the Engineering Department and the Marketing Department may be located on separate floors of an office building, your zone manager can create an "engineering workspace" primarily for engineers and a "marketing workspace" primarily for marketing professionals.

What are the Forum Tools?

The Forum tools are present in all workspaces and forums. The tools are located above the blue toolbar and to the right. These tools are more general-purpose than the forum-specific items located on the blue toolbar.

The tools include:

Tracker

Is a tracking tool provided primarily for users of Forum Version 5.1 or an earlier version. Use this tool if you want to keep track of discussion forums located on a different server machine. If you are tracking discussion forums located on the same server (or within the same zone, for WebWorkZone), use the “My summary” page instead.

Web Files

Are files in a personal storage area that you can transfer to another computer or share with others. When you click on the Web files tool, SiteScape software displays the web-file system in a separate browser window.

You can use your web-file system to access your files no matter where you are. For example, at work, you can upload files to your web-file system (by default, no one else has access to these files). Later, you can download the files to your home computer, work at home, and then upload the modified files back into the web-file system so you can retrieve them at work. In addition, you can create a folder that allows other registered users to access the files. Others can then view your folder and download the files as they choose.

Site Map

Lists the hierarchy of workspaces and forums that are accessible to you in your zone.

Remember that SiteScape software displays only the workspaces and forums to which you have access. There may exist workspaces and forums for your organization that do not appear on your site map because you do not have the right to access them. If you have a question about the complete list of workspaces and forums available to members of your organization, contact your workspace manager.

Bookmarks

Allow you to keep track of entries that interest you so that you can return to them easily in the future.

Search all

Enables you to locate entries in a zone or workspace quickly and easily. By default, the search utility allows you to enter a string of text, and our software returns a list of all entries that contain part (if the string is unquoted) or all of that string (if the string is surrounded by quotation marks, our software returns only entries that contain the whole string).

If you choose, you can search for entries based on more criteria. To do this, click **Search all**, then click on the **Advanced Search Form** link above the "Search text" box. The advanced form allows you to narrow your search according to the entry's author, its keywords, a list of forums, an "after" date, a "before" date, and (if your zone manager created workflow processes or custom commands) workflow states and custom attributes.

The **Search all** tool is contextual: clicking **Search all** produces different results depending on the current page. If you are viewing a workspace page, our software searches all of the forums you have access to in that workspace. If you are viewing the site map, the software searches all of the forums you have access to in that zone.

Help

Provides access to our online Help system. The Help system appears in a separate browser window.

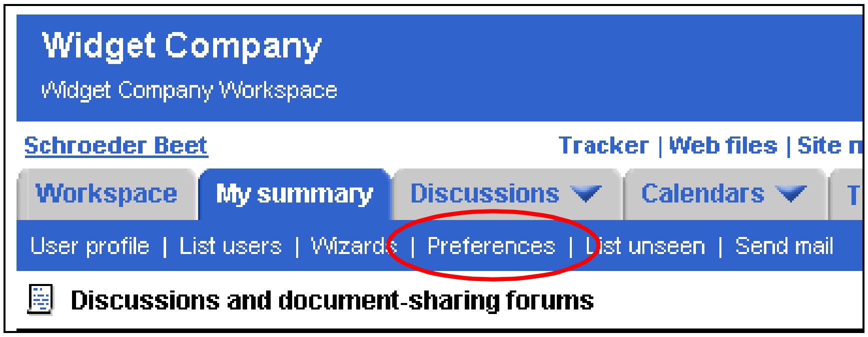
Logout

Logs you out, and displays the Login page again. This feature is particularly useful for zone, workspace, or forum managers who may have two usernames. The user can log out of her non-administrative username and then log back in using her administrative username.

“My summary" Page

My Summary provides a concise summary of information about the forums that are most important to you and your work. This page contains a count of new or modified entries for the discussion forums you want to "track" (which becomes extremely useful once the number of forums grow). In addition, you can specify that you want your summary page to display the day's (or week's) calendar entries, all scheduled chat sessions for the day, and more.

The "My summary" page is highly customizable and needs to be set up before you can use it. (For example, you need to indicate which discussion forums you want to track.) To set up or to customize your "My summary" page, click on the "My summary" tab, then click on the **Preferences** item in the blue toolbar.



Initialize or Modify the "My summary" Page

The "My summary" page is designed to track only the forums that are important to you and your work. Therefore, you must tell Forum which forums to track before the "My summary" page can display them.

To initialize or modify the settings of your "My summary" page, do the following:

1. On the "My summary" page, click on the **Preferences** toolbar item on the blue toolbar.

   Forum displays the User Preferences page. This page contains the following sections:

   - "Show the Summary page as the default home page" checkbox

     Click on this checkbox to have Forum display your "My summary" page as soon as you log in. (Otherwise, Forum displays the workspace page.)

   - "Show the selected discussion forums" checkboxes

     Click on this checkbox to have your "My summary" page track discussion forums. Then click on the checkbox to the left of the each discussion forum you want to track. The list of discussion forums that may be tracked is divided by workspace. By default, the checkboxes for all discussion forums to which you have access within all workspaces are checked.

     If you remove the check from this checkbox, then Forum removes the discussion tracking section from the "My summary" page. To display the tracked forums again, click on the checkbox to select it again.

   - "Show today's calendar events..." checkbox and select boxes

     Click on this checkbox to have your "My summary" page track calendar events. Click on the checkbox to the left of the calendars that you want to track. The list of calendars that may be tracked is divided by workspace. By default, the "My summary" page displays calendar appointments for the current day.

Again, if you remove the check from this checkbox, Forum removes the calendar section from the "My summary" page. To display calendar entries again, click on the checkbox to select it again.

- “Show the Tasks summary” checkbox

  Click on this checkbox to have the “My summary” page track new or modified tasks in the Tasks forum.

- "Show the Chat summary..." checkboxes

  Click on the checkbox, and then click on the checkbox to the left of the chat rooms whose sessions you want to track. When you do this, the "My summary" page displays all of the chat sessions in that room that are scheduled for the current day.

  Again, if you remove the check from the checkbox, Forum removes the chat section from the "My summary" page. To display the chat rooms section again, click on the checkbox to check it again.

- "Show the Messaging summary" checkbox

  Provides you access to messaging from your "My summary" page, including a list of the users who are currently "listening" for messages from other users.

2. Select and deselect items as you wish.
3. Click on the **OK** button at the bottom of the page.

Forum displays your "My summary" page with the items you specified, for example:

To modify your settings, click on the **Preferences** toolbar item again, and change your selections.

Chapter 3: Common User Tasks

In Chapter 1, you were introduced to the tasks that users would likely use immediately upon entering Forum. This chapter provides information about additional common tasks that make using Forum easier and more efficient for you.

In This Chapter

This chapter offers instructions for performing the following common tasks:

Topics	*Description*
Search for an Entry	You may want to locate discussion topics, replies, or documents that contain a specific word. For example, a search for “java” would bring up a list of all discussion-forum topics, replies, and documents that contain the word “java.
View New or Modified Entries	Discussion forums use icons and toolbar items to allow you to view new or modified entries. You can view them one at a time, or you can view a list of them.
Use the Calendar	Use Calendar, both private and group, to track events, daily or weekly appointments, and synchronize those entries with Outlook
Use Tasks	The Tasks page helps you keep track of your work by using tasks and reminders.
Modify Information in Your User Profile	You may need to update your personal information, e-mail address, picture, and more.

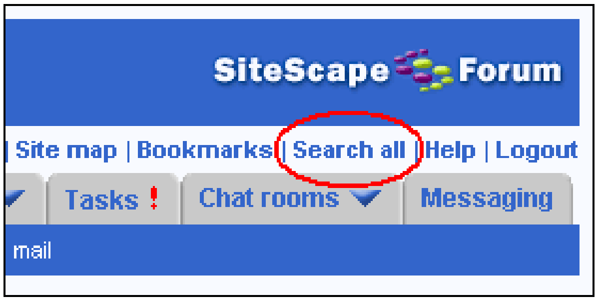
Search for an Entry

You can locate discussion topics, replies, or documents that contain a specific word or words by using the Forum search feature. You can search across all forums or in a single forum.

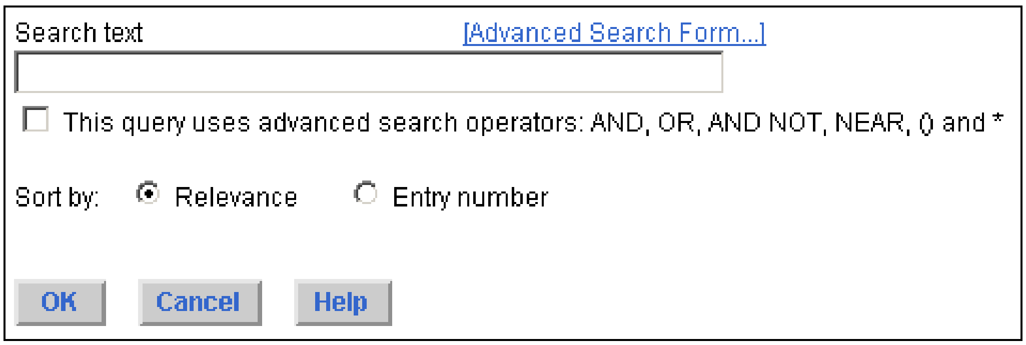
Search all forums

To search for an entry across all forums in the workspace, do the following:

1. Click on the **Search all** toolbar item located in the upper-right corner of the page.



The search page appears.



2. Enter a search string in the "Search text" box.

   If you are new to using this search engine, begin by typing words you are looking for, such as the following:

   ```
   orange juice julius drinks OJ
   ```

   To search for an exact phrase, enclose the phrase in double quotes, as follows:

   ```
   "orange juice"
   ```

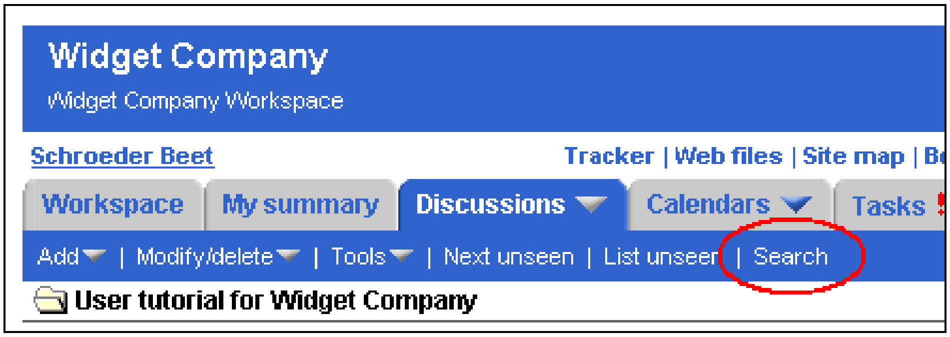
3. Choose to use special operators to narrow your search results. See the Use Special Operators to Narrow your Search section for a complete explanation.
4. Click on the **Relevance** or **Entry Number** radio button to tell Forum how to sort the results of the search.

   By default, Forum orders the search results by *relevance*. This means that the entries that are more relevant to your search text (they contain more instances of your words) appear at the top of the results list. The entries that are less relevant appear toward the bottom of the list.
5. Click on the **OK** button.

In addition to searching for entries that contain your search text, Forum also searches the contents of files (such as Microsoft Word or PDF files) that users upload into forums.

The search results appear in the same window. To view an entry, click on its title.

If you prefer to limit your search to a single forum, view the forum first (for example, view a discussion), then click on the **Search** toolbar item.



Forum then searches through only the currently displayed discussion.

If you need to search based on more criteria than a search string (for example, based on a search string, a date range, and by author), click on the **Advanced Search Form** link. Forum remembers whether you used the standard or advanced search form, and presents the same form to you the next time you do a search.

Use Special Operators to Narrow your Search

You can use the following special operators in your search:

- AND

  Finds documents containing all of the specified words or phrases.For example, **peanut AND butter** finds documents with both the word **peanut** and the word **butter**.

- OR

  Finds documents containing at least one of the specified words or phrases. **peanut OR butter** finds documents containing either **peanut** or **butter**. The found documents can contain both items, but both are not required.

- AND NOT

  Excludes documents containing the specified word or phrase. **peanut AND NOT butter** finds documents with **peanut** but not containing **butter**. NOT must be used with another operator, like AND. The search engine does not accept **'peanut NOT butter'**; instead, specify **peanut AND NOT butter**.

- NEAR

  Finds documents containing both specified words or phrases within 10 words of each other. **peanut NEAR butter** would find documents with peanut butter, but probably not any other kind of butter.

- Wildcard character (*)

  The asterisk is a wildcard; any letters can take the place of the asterisk. **Bass*** would find documents with bass, basset, bassoon, and more.

  You must type at least three letters before the *. You can also place the * in the middle of a word. This is useful when you are unsure about spelling. **Colo*r** would find documents that contain color and colour.

View New or Modified Entries

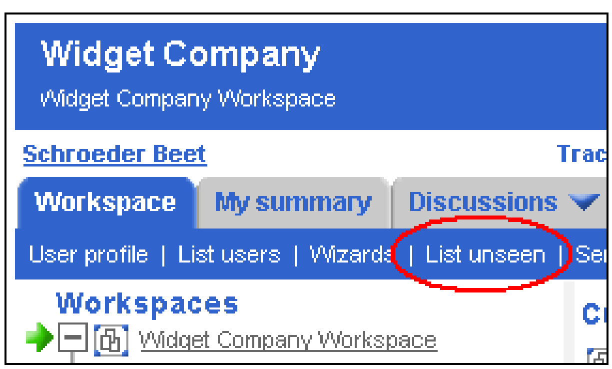
Forum has a very useful feature for displaying only those entries or replies that you have not seen. This can save time scanning forums for new or modified entries. New or modified entries are called **unseen**. To view unseen topics or documents, use the **Next unseen**, **List Unseen**, and **Unseen** icon features.

The unseen features comprise one of several methods that you can use to keep track of new or modified information. There is no right or wrong way to track recent activity; try the various methods, and choose the one that best fits your working style.

You can use the Unseen features for a single discussion forum, for all discussion forums to which you have access in a workspace, or for all discussion forums to which you have access in your zone (through the “My summary" Page). When you use the Unseen features in a single discussion forum, you see new or modified entries (or a list of these entries) directly. When you are viewing your Workspace or “My summary” page, Forum displays a summary or count of recent activity in the discussion forums.

Use List Unseen

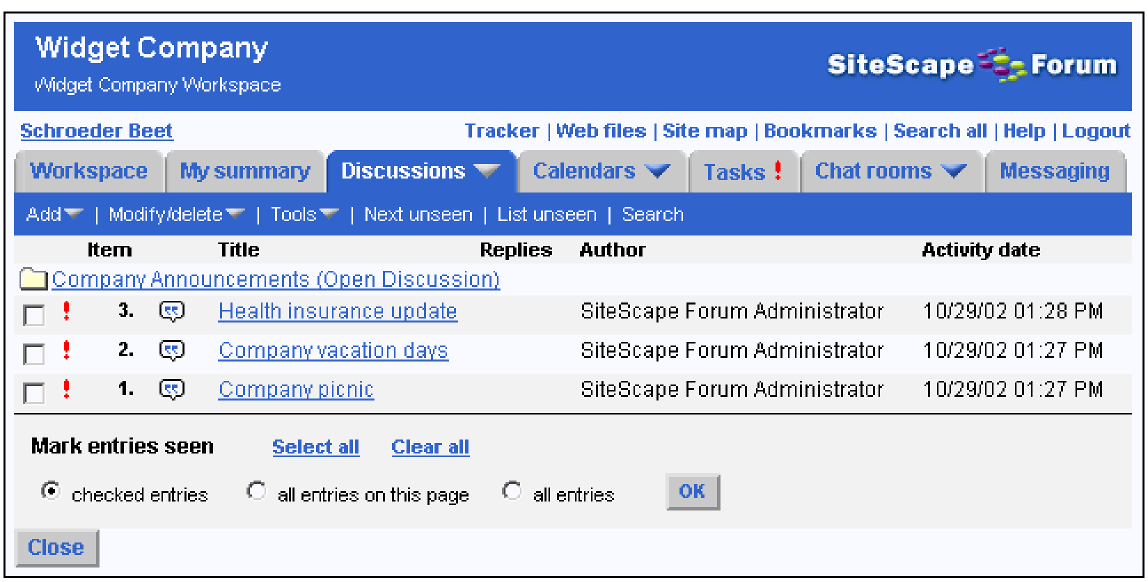
1. From the Workspace page, click on the **List Unseen** toolbar item on the blue toolbar.



Forum displays a summary of activity in all of the discussion forums you have access to in that workspace.

2. Review the count of new or modified entries in each of the discussion forums, and choose one to investigate (generally, one with a high activity count).
3. To see a list of the new or modified entries in a discussion forum, click on the linked number that represents the count, which is located to the left of the forum's title (see above).

   A list of "unseen" entries (entries you have not read yet) appears.

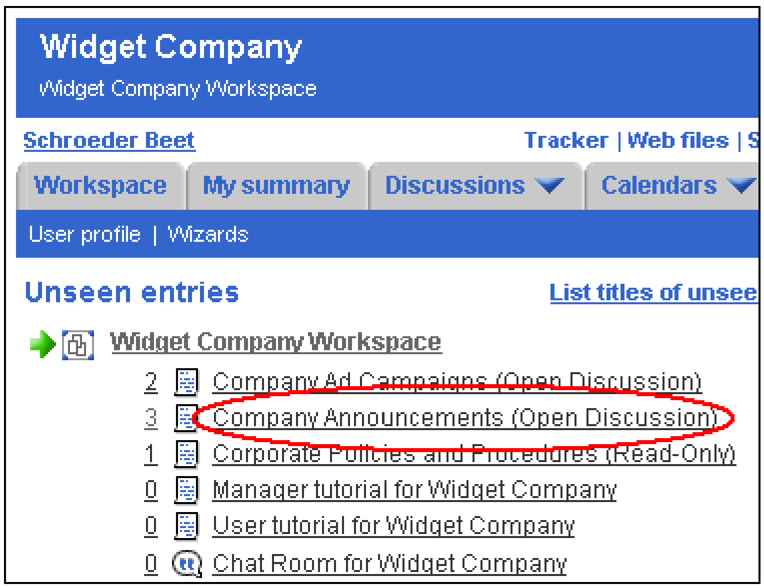


In this list, you can click on the titles of new or modified entries you wish to see, using your browser's **Back** button to return to the list. When you are finished viewing all the entries you care to see, you can scroll down to the “Mark entries seen” area, select "all entries," and click on the **OK** button.

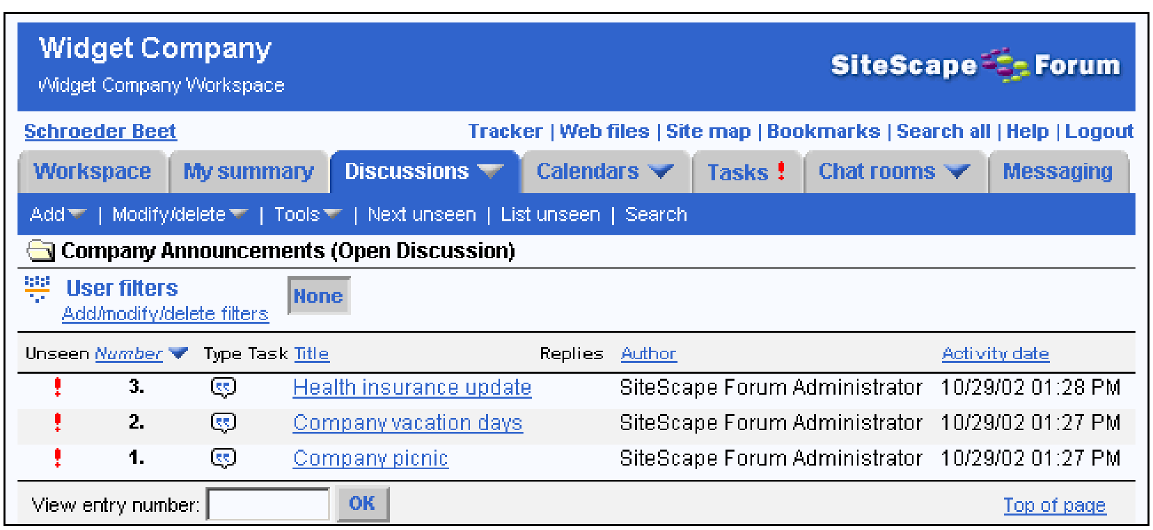
View Unseen Entries from the Summary List

As another option, you can view each new or modified entry one by one by doing the following:

1. In the summary list, click on the title of the discussion forum whose new or modified entries you wish to view.



The discussion forum appears.



2. Do one of the following:
   - Scan the left side of the folder listing for the Unseen icon (a red exclamation point). To view entries, you can click on the title of new or modified entries that are of interest to you.
   - Click on the **Next Unseen** toolbar item in the blue toolbar. You can click on this toolbar item to view the new or modified entries one by one, from the oldest to the most recently created or modified.

After you view an entry (or use the List Unseen list to mark it as "seen"), its Unseen icon disappears.

Mark All Entries as Seen

If you find that you have more unseen entries in a forum than you want to view, you can set all of the entries as seen, or set as seen all entries created before a specified date, by doing the following:

1. Enter the forum whose entries you want to set seen.
2. From the **Tools** menu, select “Set seen entries.”
3. On the “Mark entries...” page, mark all of the entries as seen, or mark as seen all entries created before a certain date.
4. Click on the **OK** button.

   From now on, unseen entries include new and modified entries from today (or from the date you specified) onward.

Manage Entries

There are several kinds of entries that you can add to a forum:

1. A discussion topic
2. A URL
3. A document entry
4. A survey

As the owner of an entry, you can change it, delete it, or reply to it.

Delete an Entry

By default, to delete a discussion topic or document, you must be the user who created that entry (or you must have administrative privileges to delete entries). This section describes how to delete a discussion topic that you created. The process for deleting other entries (documents, surveys, URLs) is identical.

To delete a discussion topic, do the following:

1. Access the discussion topic, and click on the **Modify/delete** toolbar item on the left side of the blue toolbar.

   Forum displays a drop-down menu.

2. In the menu, click on the **Delete** link.

   The "Delete items from..." page appears. It includes a list of only the folders and entries that you have the right to delete.

3. Click on the title of the discussion topic you want to delete.

   If you choose, you can select multiple items by Ctrl+clicking on the titles of the entries you want to delete. (Ctrl+clicking is the method used on Windows systems to choose multiple items in a select box. If you are using another system, use the method supported on that system.)

4. Click on the **OK** button.

   Forum displays a confirmation form that tells you that this action cannot be reversed. (There is no "undo" button.)

5. If you have specified the correct topic title or titles, click on the **OK** button on the confirmation form.

   The topic you selected has been deleted.

Delete a Reply

When you delete a discussion topic (or any discussion entry), you automatically delete all of its replies.

To delete an individual reply, do the following:

1. Click on the title of the entry that includes the reply.
2. Click on the title of the reply.
3. Follow the instructions in the previous section and delete the desired reply.

   On the "Delete items from..." page, the software includes a list of replies to that entry that you are allowed to delete. Replies are indented from the entry to which they are replying, and their entry numbers reflect that they are replies. So, for example, a discussion topic may have an entry number of 6. Its first reply appears indented in the deletion list, and it is numbered 6.1.

Use Bookmarks

Bookmarks allow you to keep track of discussion-forum entries that interest you, so that you can return to them easily in the future. Once you have added a bookmark, Forum remembers it. The next time you log in, click on your bookmark in the Bookmarks list, and Forum takes you to the appropriate entry.

Add a Bookmark

To add a bookmark, do the following:

1. Click on the title of an entry you wish to bookmark.
2. From the **Attach** drop-down menu, select **Attach Bookmark**.

   Forum displays the blue Bookmark icon just below the entry title.
3. Click on the link just above the entry title to return to the folder listing.

   The new bookmark appears to the left of the entry in the folder listing.

View a Bookmark

When you want to view a bookmarked entry, you can use the Bookmarks page or the "My summary" page.

To view a bookmarked entry using the Bookmarks page, do the following:

1. Click on the **Bookmarks** link, located in the upper-right corner of the page.

   Forum displays the Bookmarks page. You can click on a column heading to sort your bookmarks by entry number or by discussion forum.
2. Click on the title of a bookmarked entry.

   Forum takes you to the entry in the discussion forum.

To view a bookmarked entry using the "My summary" page, do the following:

1. Click on the "My summary" tab.
2. Click on the **Bookmarks** toolbar item.
3. Select a bookmarked entry from the drop-down list.

   Forum takes you to the entry in the discussion forum.

Use Tasks

The Tasks feature helps you to keep track of your work using two types of entries, as follows:

Tasks

Activities that are assigned to users. Forum indicates when the task is started, almost due, completed, or overdue. Optionally, Forum can send e-mail to assigned users to inform them of the creation or the due date of the task.

Reminders

Provide documentation of events that users need to remember. Forum sends e-mail notifications on or before the dates of the events. You can remind yourself or others of deadlines, errands, meetings, and more.

You can also add a task to a discussion-forum entry. In this way, the entry can provide documents or discussion replies that are useful or necessary for the completion of the task.

Add a Task or Reminder

To add a task or reminder to the Tasks page, do the following:

1. Click on the Tasks tab.

   The Tasks page appears.
2. From the **Add** drop-down menu, select **Add a task** or **Add a reminder**.

   The "Add a task" or "Add a reminder" form appears.
3. Fill in the items on the form, including the title, description dates, assignees, priority level, and so on.
4. Click on the **OK** button.

The new task or reminder appears in the appropriate section.

Sometimes a task or reminder may be directly related to the content of an entry in a discussion forum. In this case, it is helpful to place the information in the entry itself, so that people can view the task or reminder and the content of the entry at the same time.

Associate a Task with a Discussion

To add a task or reminder to a discussion-forum entry, do the following:

1. From the discussion forum, click on the title of the entry to which you want to add a task or reminder.

   The entry page appears.
2. From the **Add** menu, select **Add a task** or **Add a reminder**.

   The "Add a task" form or the "Add a reminder" form appears.

3. Enter the task or reminder information.

   When you add a task to a discussion-forum entry, you can choose from two different attributes:

   - **Private**: Only the task creator and the assignees can see the task.
   - **Public**: By default, anyone who has the right to view the discussion forum can see the task as well.

   By default, users can add both public and private tasks to discussion-forum entries. However, managers may turn off access to this feature.

4. Click on the **OK** button.

   The entry page reappears, with the task or reminder information below its title.

Complete a Task or Reminder

Task or reminder assignees can move their tasks or reminders to the **Completed** state to show that they have finished the work.

To move a task or reminder to the Completed state, do the following:

1. Click on the Tasks tab.

   The Tasks page appears.

2. Click on the name of the task or reminder you want to move to the Completed state.

   The task or reminder appears.

3. From the "Change state to:" drop-down list, select **Completed**.

   Note: You cannot change the state of a reminder if the reminder has not been sent yet.

4. Click on the **OK** button.
5. Click on the **Close** button at the bottom of the page.

   The Tasks page reappears. The task or reminder is now in the "Completed tasks" section.

Edit a Task or Reminder

When you edit a task or reminder, you can change many of its attributes, including its title, description, due date, and more.

To edit a task or reminder, do the following:

1. Click on the Tasks tab.

   The Tasks page appears.

2. To the far right of the task or reminder you want to edit, click **edit**.

   You can also click on the **Modify** button on the task or reminder's entry page.

   The "Modify..." form appears.

3. Make your changes to the form.

4. Click on the **OK** button.

The entry page reappears, displaying your changes.

Delete a Task or Reminder

If you do not plan to restart a task or reminder, you can delete it. Once you delete the entry, you cannot undo the deletion.

To delete a task or reminder, do the following:

1. Click on the Tasks tab.

   The Tasks page appears.
2. Click on the checkboxes of the tasks or reminders you want to delete.
3. Click on the **Delete selected tasks** button.

   The Tasks page reappears. The selected tasks or reminders have been deleted.

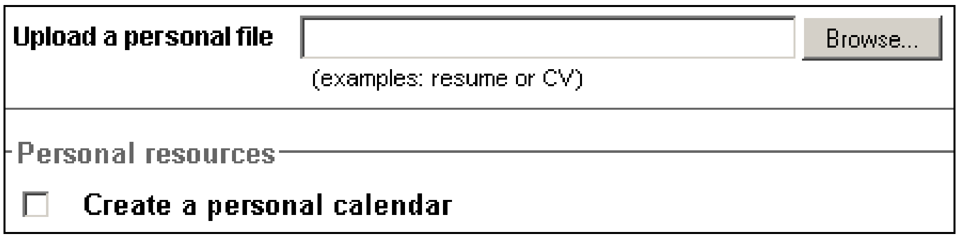
Use the Calendar

This section provides information about common tasks for new calendar users.

Viewing Your Personal Calendar

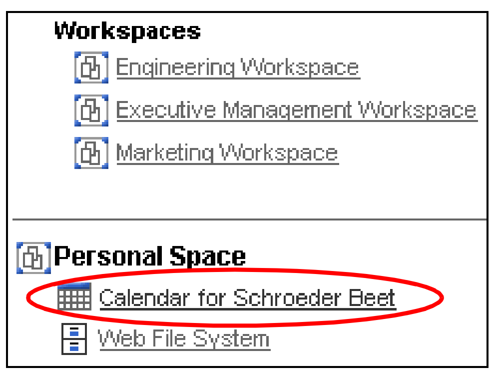
In addition to any workspace calendars that your zone manager creates, each user can have a personal calendar. You can choose to keep this calendar private or to allow other users to view your calendar entries.

When initially registering as a new user, you are given the option of creating a personal calendar by clicking on the “Create a Personal Calendar” checkbox.



If you did not create a personal calendar when you first registered, and you would like to have a personal calendar now, you may create one by modifying your User Profile. If you are unable to perform this task, contact your zone manager.

After you create a personal calendar, a link to it appears in the Personal Space section at the bottom of your Workspace page, as follows:



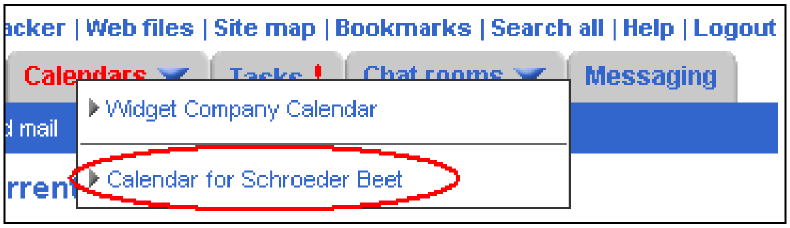
Click on this link to access your personal calendar.

You can also navigate to your personal calendar (or any calendar that you are able to access) by doing the following:

1. Click on the Calendars tab.

   A drop-down list of calendar titles appears.

2. Click on the name of your personal calendar. You personal calendar is always the last menu item on the list and appears below a dividing line, as the following picture shows:



Viewing a Specific Day

To view a specific day, do the following:

1. On the calendar, enter the day, month, and year in the text boxes in the lower-right corner of the calendar page.
2. Click on the **Go** button.

   Our software displays the appointments for that day.

Scheduling an Appointment

To schedule an appointment on a calendar, you need to be the calendar's owner, or you need to have permission to add calendar entries. (By default, you are allowed to add appointments to your personal calendar.)

To schedule a single appointment, do the following:

1. On the calendar, click on the **Add Entry** toolbar item.

   Our software displays the "Add a calendar entry" form for the day you are currently viewing.
2. If you want to add an entry for another day, specify that day in the Date section. Otherwise, Forum schedules the appointment for today.
3. You must provide a title, a start time, and an end time for your entry. All of the other information on this form is optional.

   To enter a time, you can either use the drop-down menu or click on a link in the list of provided times. If your entry does not start at the beginning of the hour, you can click on the links at the far right, which provide fifteen-minute increments. For an all-day event, click on the **Set an all-day event** link. Our software places the phrase "AllDay" in both the Start Time and End Time drop-down menus.

   If you want your entry to recur daily, weekly, or monthly, click on the **More options** button to access the "Repeating entry" section of the form. See the next section for more information about adding repeating entries.
4. Click on the **Submit Entry** button, located at both the top and the bottom of the form.

   Your appointment is now scheduled.

Scheduling a Repeating Appointment

If you want to add a calendar appointment that repeats regularly, you can use the "Repeating entry" section of the "Add a calendar entry" form.

To add a repeating entry, do the following:

1. Access the "Add a calendar entry" form.
2. Specify a title, a start time, and an end time for your entry.

   Optionally, you can specify a location and a description.
3. Click on the **More options** button.

   The "Repeating entry" section appears below the **More options** button. You may need to scroll down to view it.

   For repeating entries, you must specify both how often (Frequency) and for how long (Range) an entry is to be repeated.
4. Specify the Frequency.

   You can specify a frequency of "every n days/weeks/months" (where "n" is a number you enter), and you can choose one or more specific days of the week or the month (every Wednesday and Friday, the second Tuesday of the month, and more).
5. In the Range section, specify the Start date of the entry.
6. Select one of the End date options:

   - Specific end date

     Use this option to specify the exact date on which your entry will end.
   - No end date

     Use this option if you want your entry to recur indefinitely.
   - Repeat count

     Use this option to specify the exact number of times you want your entry to recur.

     By default, the calendar contains 10 occurrences of your repeating entry. You can specify a different number.
7. Optionally, click on the checkbox and specify a URL to include in your entry.
8. As another option, you can click on a radio button to include a link to a Forum entry, or create an entry in another forum and then include a link to it.
9. Click on the **Submit entry** button.

   The Calendar page reappears, displaying your new entry. You can click on the entry title to see the details you specified.

Merging Calendars

It is common to use more than one calendar in Forum and WebWorkZone. If you choose, you can view, in a single calendar, entries from all of the calendars to which you have access. For example, a corporate calendar ("The WidgetCo Corporate Calendar") can include entries from other calendars ("Engineering Department Calendar," "Marketing Department Calendar," and so on). As another example, you can merge your individual calendar with the corporate calendar so that you can view entries from both at the same time.

The following are the steps required to merge your personal calendar with a workspace calendar:

1. In the Calendars drop-down menu, click on the **Calendar for [your name]** link to access your personal calendar.
2. Click on the **Tools** toolbar item.
3. Select the **Merge Calendars** menu item.

   Our software displays the Merge Other Calendar Entries form, which provides a list of all of the calendars that you are allowed to view.
4. In the select box, Ctrl+click all of the titles of the calendars whose entries you want to appear along with entries from your personal calendar.

   Note: *Ctrl+click is a method used on Windows systems for selecting multiple items in a list. If you are not using Windows, use the method supported by your system.*
5. Click on the **OK** button.

   The specified calendars have been merged.

The **Hide merged entries** or **Show merged entries** link in the lower-left corner of the Calendars page lets you choose which entries appear on your calendar. When your calendar is first merged, our software displays entries from all the calendars you merged. If you find that your calendar is now too crowded, you can click on the **Hide merged entries** link to view only entries specific to that calendar. The **Hide merged entries** link is then replaced by the **Show merged entries** link. Clicking on the **Show merged entries** link allows you to view the merged calendar entries again.

To remove a merged calendar's entries in a more permanent manner, repeat the steps in the previous list, and, on the Merge Other Calendar Entries form, remove the highlighting from the calendar whose entries you wish to remove. Using a Windows system, Ctrl+click on calendar titles to remove the highlighting; if you are using another system, use the method that works for your system.

Modify Information in Your User Profile

Occasionally, user information becomes obsolete or out of date. To keep your User Profile information current, do the following:

1. On the Workspace page, click on the **User Profile** toolbar item, located on the left side of the blue toolbar.

   Our software displays your registration information.

2. Click on the **Modify Profile** toolbar item on the left side of the blue toolbar.

   The Modify Profile page appears.

3. Modify any of the following values: name, password, organization, E-mail address, signature, telephone number, personal introduction, language preference, and more.
4. Click on the **OK** button.

   Your user profile has been modified.

Chapter 4: Co-Authoring a Document

SiteScape Forum provides you and your teammates with the ability to efficiently co-author a document. Forum provides automatic locking and unlocking of documents that you are editing, document versioning, in-place editing, multi-level document attachment, and more.

There are two ways you can use SiteScape Forum to co-author a document. You can attach a file to an entry and make it modifiable, or you can use our prepackaged, specialized forum created especially for document review. This chapter discusses both of these scenarios.

In This Chapter

This chapter offers instructions for performing the following common tasks:

Task	*Description*
Co-author the Modifiable Document	The document becomes available for review to users who have access to the discussion forum.
Modify the Attachment	You can edit a document that has been attached to an entry, locking it, making modifications, saving it, and then uploading it.
Modify an Attachment Locally	Modify a document by saving it to your disk, making the modifcation, then reloading the document.
Reserve-and-Release Method	Lock the document while you are making changes then release it when it is safe for others to make changes.
Co-author Using the Document-Review Process	A pre-configured forum allows you to automatically send a document through various states to being.
Add the Document Review Process to an Entry	Apply a predefined workflow process to a standard entry.

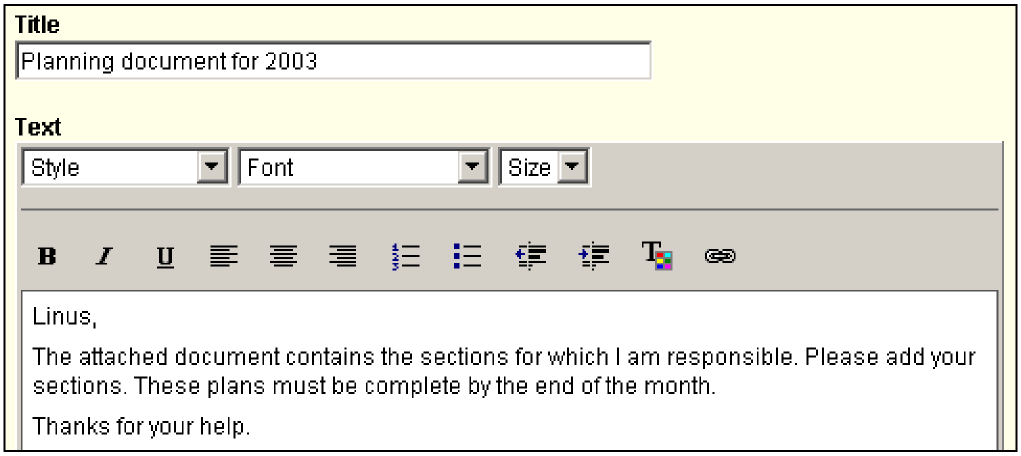
Co-author the Modifiable Document

When you are co-authoring a file or document, the simplest way to share the document or documents is to add the document as an attachment to a topic in a discussion forum. As you add the attachment, you choose to make the document modifiable by others. In this way, the document is centrally located and available for modification by those who have access.

To establish the co-authoring environment on SiteScape Forum, perform the following steps:

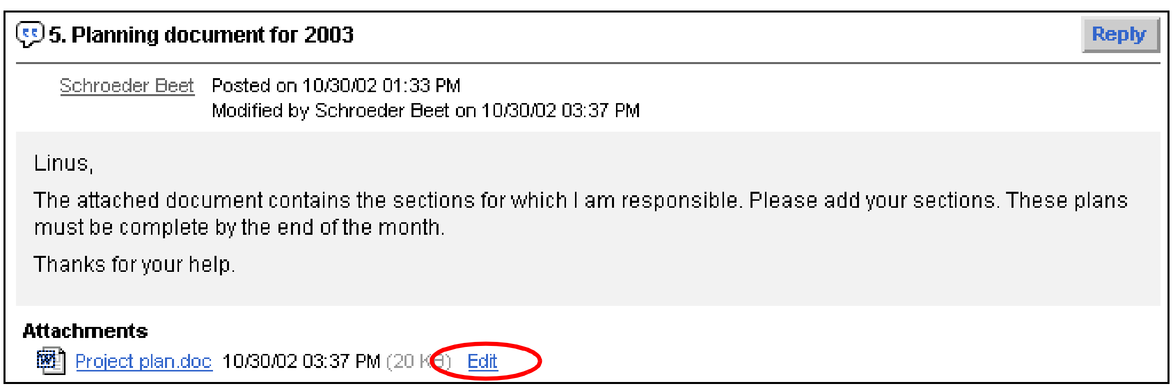
1. In the discussion forum, add a discussion topic.

2. On the “Add a discussion topic” form, enter a title for the topic, and add some text describing the co-authoring task.



3. On the “Add a discussion topic” form, click on the “Allow other members to modify this entry” checkbox.
4. Click on the **Browse** button to locate the file on your computer, then click on the **OK** button.

   The discussion topic appears, displaying the attachment. Notice that the attachment has an **Edit** link next to it.



Whenever you want to edit the file, click on the **Edit** link. The editing applet automatically opens the file in the appropriate editor for that document. For example, if the file is a Microsoft Word document, Microsoft Word opens the file; if the file is an Excel spreadsheet, Microsoft Excel opens the file, and so on.

The editing applet automatically prevents more than one user from editing the file at the same time. However, if you edit the file locally, you need to reserve and release the document in order to "lock" it in this way. See the Reserve-and-Release Method section for more information.

In some cases, you may be concerned about conducting a more private review process, to limit the number of users who can see the document as it is revised. In these cases, consider placing the document in a forum or a workspace with limited access, or use a workflow process for a finer level of access control.

Modify the Attachment

You can edit this file because as the person who attached it, you have ownership. You have also allowed others to modify this entry, so any members of the discussion forum can modify the document by clicking on the **Edit** link next to the attachment link.

The editing applet automatically reserves the entry, downloads the file, starts it in the appropriate editor, and then waits for the editing session to end. When you exit the editor, the editing applet will ask you if you want to save the changes to the forum, and then Forum uploads the file and unlocks the entry.

If your file extension is not supported by the editing applet, you can use the other method of file editing, where you manually reserve the entry, edit your file, save the changes, upload the attachment, and then release the entry. See the Reserve-and-Release Method section for more information.

In order to use the editing applet, you must have Java Plug-in 1.4.1 installed on your client machine. The first time you use the editing applet, if you do not have the Java Plug-in on your machine, you will be prompted to install the Plug-in. The Plug-in is contained in the installed SiteScape Forum kit, so you do not have to download the Java application from another source. After installing the Plug-in, you can use all the Java-based features that Forum provides.

To modify an attachment that you posted to a discussion, do the following:

1. In the discussion forum, click on the title of the entry containing the attachment.
2. Click on the **Edit** link to the right of the attachment link near the bottom of the entry page.

   The document appears in the editor associated with that document extension. For example, a `filename.doc` file brings up the Microsoft Word editor.
3. Modify the attachment as you would any other file in that editor. Save your changes. Do not change the name of the file, or the editor saves the changes as a new file rather than the file you want to upload.
4. Exit the editing application. This action returns you to the browser window.

   If you leave the browser window for any reason, you lose the ability to upload the changes you have made to the file in this editing session. You may lose any edits that you have not saved in the editor.
5. Once you have exited the editing application, you can control the following from the browser window:

- Whether to save or discard changes
- Whether to save previous versions of the document
- Whether to lock or unlock the entry

6. Click on the **OK** button.

   Forum saves your changes to the attachment.

Modify an Attachment Locally

If you cannot use the editing applet Forum provides for editing documents and attachments, there are several possible reasons:

- Perhaps company policy does not allow you to install the Java plug-in required to run the editing applet.
- The document types supported by the editing applet may not meet your requirements.

If you cannot use the editing applet, you can modify an attachment locally by doing the following:

1. View the discussion-forum entry with the attachment.

   Note: *By default, you must be the author (or owner) of the entry in order to attach files to it or to modify those attachments. If you are not the person who created the entry, contact your discussion-forum manager to obtain permission to modify the attachment.*

2. Right-click on the title of the attachment.

   A menu appears.

   Note: *Right-clicking is the method for opening an alternate-context menu on Windows systems. If you are using a different platform, use the method that works for your system.*

3. Use the **Save Target As...** link to save the attachment to your local computer.
4. Modify the source file on your local computer.

   For example, if the attachment's source file is a Microsoft Word file, use Microsoft Word to edit the file on your computer, then save your changes. Do not change the name of the file. (If you change the name of the file and then upload it as an attachment, Forum adds it as a new attachment instead of modifying the old attachment.)

   The remaining steps tell you how to upload the newly modified attachment.

5. View the entry that contains the attachment.
6. Click on the **Attach** toolbar item on the left side of the blue toolbar.
7. In the displayed menu, click on the **Attach files** link.

   Forum displays the "Add attachments" form.

8. Use one of the **Browse** buttons to locate on your computer the modified source file of the attachment.

The file's path appears in the text box next to the **Browse** button.

The name in the text box should be identical to the name of the attachment. In this way, Forum can replace the old attachment with the newly modified file.

9. To modify the attachment, make sure that the "Save any previous versions" checkbox is not checked. Or, if you want to save the previous version of the attachment, make sure that the "Save any previous versions" checkbox *is* checked.

   Forum posts previous versions with a version number attached to the end of their filenames.

10. Click on the **OK** button.

    The attachment is now modified.

Reserve-and-Release Method

If you are co-authoring a document and you need to modify it locally, it is useful to reserve the document entry while you are editing it, so that no one else can modify it at the same time. After you upload your edits, you can release the entry so that others can continue to modify it.

To use the reserve-and-release method, do the following:

1. View the discussion-forum entry with the attachment.
2. Click on the **Modify/delete** toolbar item.
3. In the displayed menu, click on **Reserve/release**.

   A confirmation screen appears, displaying the name of the document.

4. Click on the **OK** button.

   The entry page reappears, displaying the "Reserved entry" icon. No one else can modify the document while you are editing it.

5. Follow the steps in the Modify an Attachment Locally section to modify the source file and upload it again.
6. After you upload the revised document, select **Reserve/release** from the **Modify/delete** menu.

   A confirmation screen appears.

7. Click on the **OK** button.
8. Forum releases the document, making it available for other team members to modify. The "Reserved entry" icon no longer appears.

Co-author Using the Document-Review Process

The review-process customization allows you to specify the names of users who privately review a document. During the review, the entry is labeled "In review," and only the designated reviewers can view the document. All other individual users automatically see nothing (it appears as if Forum "skipped a number" and the entry does not exist).

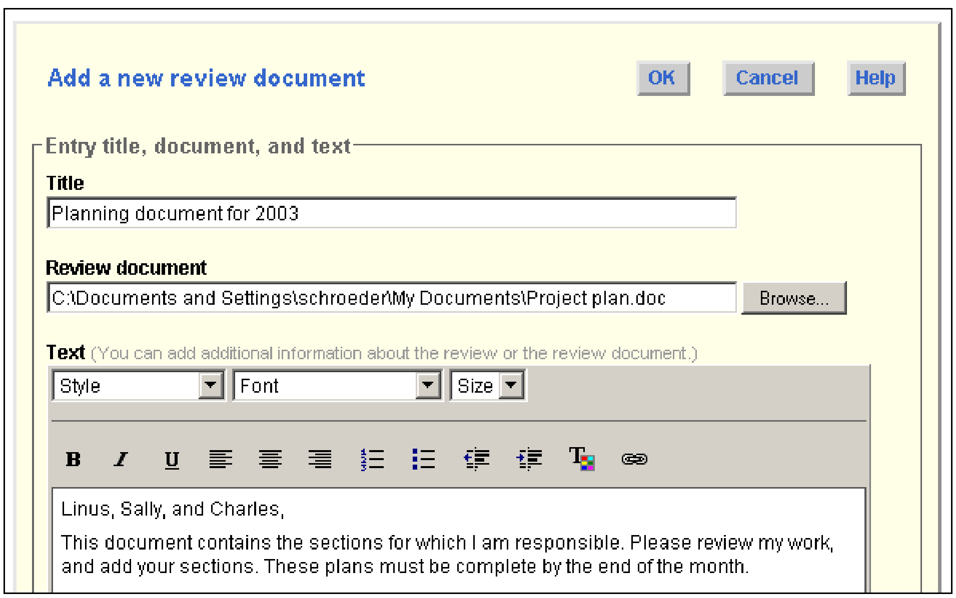
When all of the reviewers indicate that the review is ready, Forum automatically labels the entry "Public," and other users can then view the document. As another option, the user who created the entry (its "owner") can end the review before all reviewers agree that the work is finished. If this happens, SiteScape software labels the entry "Owner made public."

To place a document in a private-review process and work with it to completion, do the following:

1. View a discussion forum that implements the review-process customization.
2. From the **Add** menu, click on **Add Review Document**.

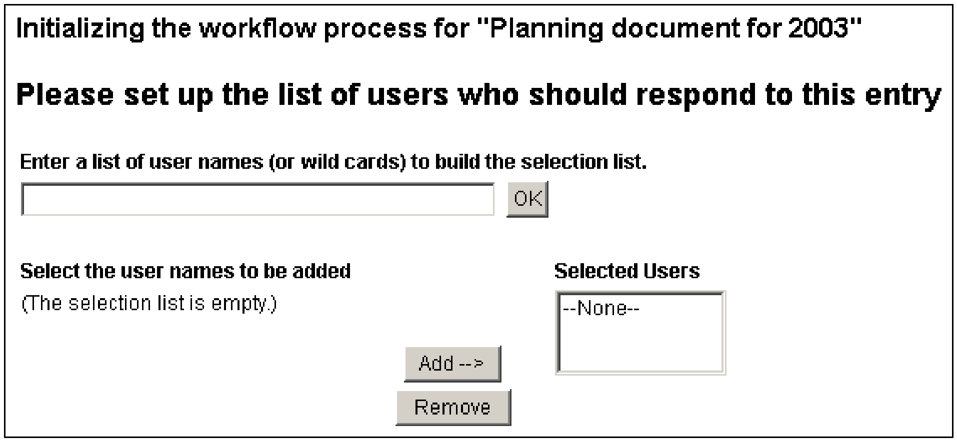
   (If you do not see the **Add Review Document** menu item, ask your manager to implement the review-process customization for this discussion forum.)

   The “Add a new review document” form appears.



3. Enter a title for the entry, then use the **Browse** button to locate the file on your computer.
4. Enter some descriptive text in the Text box.
5. Complete the rest of the form, then click on the **OK** button.

SiteScape software displays the "Intitializing the Workflow Process for..." form. You use this form to designate the users who are allowed to review the document.



6. In the "Enter a list of user names..." text box, enter a search string that our product can use to create a list of usernames from which you can select your reviewers.

   For example, if you know a username, type it. If you know that the username begins with "smi", type "smi*". To see a list of all users in your zone (if you are sure that the list is manageably short), type "*".

7. Click on the **OK** button located to the right of the text box.

   In the "Select the user names to be added" text box, Forum displays the usernames that match your search string.

8. In the "Select the usernames to be added" text box, Ctrl+click on the names of the people you want to be reviewers.

9. Click on the **Add** button.

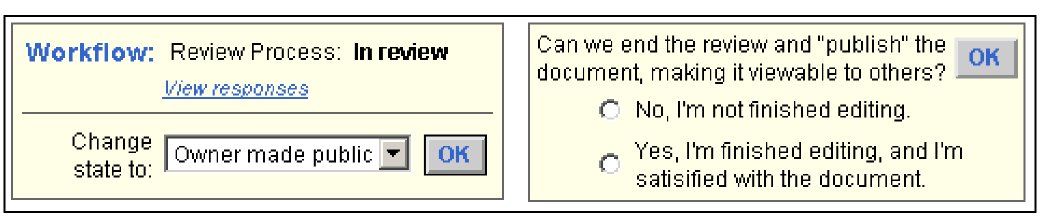
   SiteScape software adds the usernames to the Selected Users text box, located to the right of the **Add** button.

10. Repeat the previous four steps until the Selected Users text box contains the usernames of all of the reviewers.

    If you mistakenly add someone whom you do not want to be a reviewer, click on that person's name in the Selected Users text box, and click on the **Remove** button.

11. Click on the **OK** button.

    Forum displays the document entry with the following table at the top of the page:



The left column of the table indicates that the document is "In review." Only the users that you specified can view this document. When viewing the folder listing, reviewers see the document entry with its "In review" label, and other users see nothing (it appears as if Forum "skipped a number" and the entry does not exist).

The right column contains a question for each reviewer ("Can we end the review...?"). After the reviewers discuss and edit the document, each person can answer Yes to this question. As soon as every reviewer answers Yes and clicks on the **OK** button, SiteScape software automatically labels this document "Public," and it then allows others to view and discuss the document. If one or more reviewers answer No or do not answer the question at all, Forum keeps the entry "In review."

The owner of the entry (the person who created it) also sees a "Change state to" drop-down list. If the owner chooses the item and clicks on the **OK** button, it forces an end to the review process.

If you would like to see how reviewers have responded to the question so far, you can click on the **View responses** link in the left column.

12. Review, discuss, and edit the document.
13. When you think that the document is ready for public viewing, click on the Yes radio button in the right column, and then click on the **OK** button.
14. When the last reviewer has responded Yes to the question, the entry becomes public. Users other than the reviewers are now able to view the document entry.

Add the Document Review Process to an Entry

The review-process customization is, in part, a predefined workflow process. If you choose, you can apply this workflow process to a standard entry in a discussion forum (document, topic, URL, or survey). To apply this workflow process to a standard document, do the following:

1. Add a document entry to the forum.
2. View the document entry page.
3. Click on the **Tools** toolbar item.
4. Click on the **Initiate a workflow process** menu item.
5. Our software displays the "Initiate a Workflow Process for..." form.

   If you do not see the **Initiate a workflow process** menu item, ask your discussion-forum manager to implement this customization.
6. In the "Select the workflow..." section of the form, click on the Review Process radio button, then click on the **OK** button.
7. Forum displays the "Initializing the Workflow Process for..." form. Use it as described in the previous procedure.

If you have other repetitive business processes that are a part of your work (such as help-desk work, resume reviews, purchase-order approval, and so on), ask your discussion-forum manager to define a workflow process that reflects your own unique business process. In this way, Forum can automate these repetitive tasks and send helpful e-mail reminders to people who are required to do the next step in the task.

Chapter 5: Workflow with a Sales Lead Forum

This chapter discusses the specialized forum features available with SiteScape Forum. Your system administrator can use the prepackaged forums as a beginning for organizing your company's workflow process.

In this Chapter

This chapter defines workflow and describes a typical user scenario for using the customized Sales Lead forum.

Feature	*Description*
What is Workflow?	Workflow enables your forum manager to create entries that automatically move through a well-defined, orderly process, guided by actions that specific users take on the entries.
Custom Entries	SiteScape provides several pre-defined custom entries for the user to build on and define to suit his/her workflow process.
Sales Leads Account Scenario	A simple user scenario that walks you through a typical sales lead workflow.
Filter Entries	Only see what you need to, to do your job by creating and using filters.
Generate a Report	The reporting feature can help create status reports, and so forth.

What is Workflow?

Workflow is the process of defining series of tasks that produce a final outcome. Your Forum administrator can define different workflows for different types of jobs. In a publishing setting, a document might be automatically routed from writer to editor to proofreader to production. At each stage (or *state*) in the workflow, one individual or group is responsible for a specific task. Once the task is complete, the workflow can notify the individuals responsible for the next task and send them the data they need to complete their part of the process.

States are the steps in a workflow process. Forum specifies an entry's workflow state in an extra column in the forum's folder listing.

You might define these states for a purchase-order workflow process:

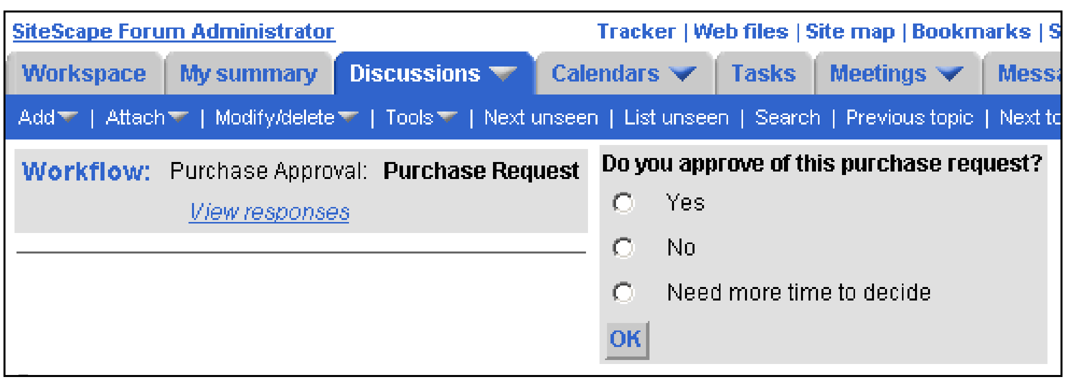
- Purchase Request
- Management Approved
- Management Rejected
- Ordered

The flow could be defined as follows:

1. An employee submits a request for a purchase.
2. That person's supervisor must approve or reject the request.
3. If the supervisor approves the order, someone in Purchasing must place the order.

At every state, it is possible to define the process so that only those people who must take action on the item are allowed to see it. It is also possible to have Forum automatically notify someone when a workflow entry requires their attention (for example, the supervisor can be notified through e-mail when one of her employees places a purchase request in a discussion forum).

Workflow entries are very similar to standard entries. Usually, people perform "work" on the workflow entry by answering a special workflow question.



The following are items located toward the top of a workflow entry:

- Process name and state

  Identifies the entry as belonging to a certain workflow process ("Purchase Approval"), and it lists the current state of the entry ("Purchase Request," "Management Approved," and more).

- The **View responses** link (appears only if a question is defined)

  Displays a page that lists the users' answers to a workflow question (described next).

- "Change State to" drop-down box (appears only if defined)

  Allows designated users to manually change the entry to another state in the process.

- Question (appears only if defined)

  Presents a question for the user or users to answer, with a radio-button list of possible answers. When a user (such as a supervisor) clicks on a radio button and then the **OK** button, the entry moves to another workflow state ("Management Rejected" or "Management Approved").

Actions that move an entry through the various states in a workflow process include adding a reply to the entry, answering a question, or manually changing the workflow state.

Custom Entries

Forum and its discussion forums are very customizable. Your forum manager can configure and customize the discussion forum to meet your exact needs. As another option, your organization can hire SiteScape to customize the software for you.

There are three types of customized discussion forums: customizations that affect an entire discussion forum, limited customizations that apply only to individual entries within a discussion forum, or customizations designed by your forum manager to be unique to your organization.

Customized Discussion Forums

Customized discussion forums include:

- Filtered Discussion Forums

  Require you to select one or more attributes whenever you create an entry. Attributes are descriptive keywords defined by your forum manager, or they can be a list of registered usernames. When you view a folder's listing, you can filter the folder according to an attribute (so that the folder displays only those entries that have that attribute assigned to them that you requested).

- Discussion-Only Forums

  Disable all entry types except for discussion topics, replies, and polls. You cannot add documents or URLs.

- Moderated Discussion Forums

  Disable users from posting new entries until a designated moderator approves of the entry. Once the moderator approves the entry, the entry becomes visible to all participants.

- Private Discussion Forums

  Allow you to create private topics that can be seen only by the person who creates the topic and a group of users defined by the forum manager.

Your forum manager has the ability to define custom commands and workflow processes that are unique to your organization. Therefore, the steps required to use these customized entries must be described and documented by the forum managers who create them.

Custom commands are standard discussion entries that have one or more extra items on the page (for example, lists, tables, or labels that provide specific information, such as the type of computer you are using or organizational information). Workflow processes are discussion entries that follow a defined and orderly process, in which certain users, in a certain order, must take specific actions on the entry. (For example, a purchase-order, document-review, resume-review, sales-lead, or help-desk workflow process.)

Sales Leads Account Scenario

The sales account manager is a specialized forum that lets you manage and track the entire cycle of a sales lead. This forum is a customization of the standard discussion forum; it simplifies the assigning of leads, provides powerful tools to sort a list of leads, and allows the sales manager to manage and monitor the process.

In this user scenario, the sales account executive uses the customized forum to track leads, enter new contact information, add notes to the contact card after follow-up, and generate a weekly status report to send to his sales manager.

Sort Entries

Since the sales account manager's folder-level view can contain many leads, you may want to see a subset of leads that are of interest to you. For example, you may want to see only your own leads, all of the high priority leads, or all of the leads entered after a certain date. You may also want to vary the order of the leads. For example, you may want to see your leads in order from most recent to oldest.

When you specify that you want to view a subset of leads, you filter the folder-level view. The sales account management forum has filters that are defined by your forum managers. These are located in the "Filters" row, just above the list of entries. In addition to these pre-set filters, you can define your own private filters using the **Add/modify/delete** filters link in the "User Filters" row, just above the "Filters" row.

When you re-order the entries according to data in the lead, you sort the leads.

Through the use of filtering and sorting, Forum allows you to view various groupings of leads according to the data that is most important to you. The settings you choose to filter or sort entries by affect your view only. After you exit the forum, the settings that you used remain in place for your return.

Add a Sales Account Card

In this scenario, leads are entered in two ways:

- Manually by the sales executive

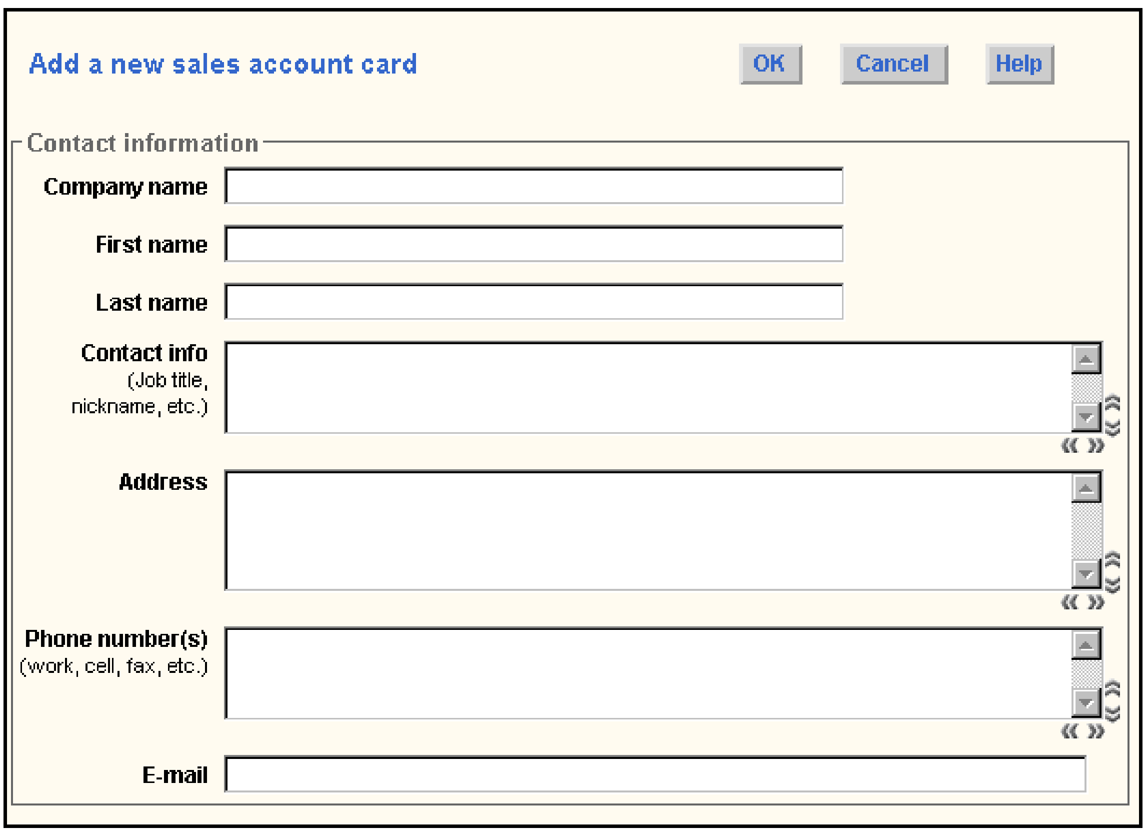
  In this case, the sales executive adds a sales account card (a lead) manually. This process is similar to creating any standard discussion entry.

- Programmatically by a web site application that requests information from potential users who download the software from the company web site. Potential users must fill out a form to get the demonstration software. All the data points in the form populate the fields in the sales leads forum automatically.

To add a sales account card, do the following:

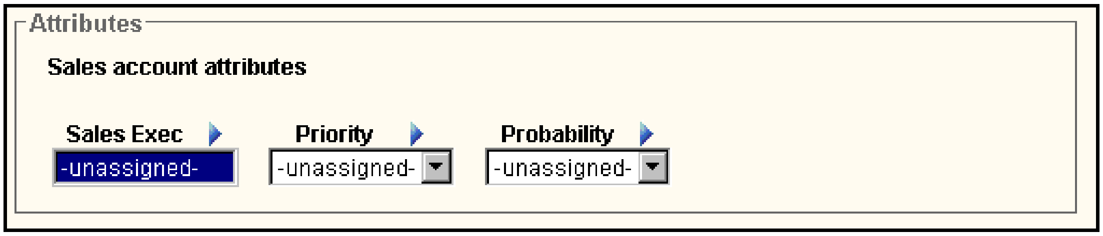
1. In the sales account manager forum, click on the **Add** toolbar item.
2. Click on the **Add a sales account card** menu item.

   The "Add a new sales account card" form appears.



3. Complete the form.

In the Attributes area, the sales executive assigns the account a Sales Executive, a Priority, and a Probability.



He can sort accounts according to any of these attributes. If the forum manager has created other attributes for this forum, the sales executive can assign them with this form.

The sales executive enters important information about the account in the Discussion text box. The sales executive can also attach a file and enter keywords for this contact. A user who does a search using one of the keywords will find this account.

4. Click on the **OK** button at the bottom of the form.

   Forum displays the folder listing with your new entry at the top.

Add a Note

Every contact card includes a notes field. The sales executive can enter any notes and reminders that he/she may wish to reference when viewing the contact card. These notes are viewable by all users of the sales account manager forum.

To add a note to a contact card, do the following:

1. From the sales account manager forum, click on the title of the contact card to which you want to add a note.
2. Click on the **Add a Note** button in the middle of the contact card entry.

   The browser opens a "New Note" text box directly below the button.
3. In the text box, enter the note you wish to add.
4. Click on the **OK** button above the text box.

   The browser redisplays the contact card. The new note appears as the top entry in the **Notes** section of the card.

Daily Update of Tasks and Reminders

The sales executive uses the “My summary” page to begin the day. He or she checks for tasks and reminders due on the day. For example, the sales executive may have reminders to do some follow-up calls on a sales lead.

In addition, the sales executive can see the whole week of appointments by clicking on the **This week** link.

He or she can also send e-mails which can be sent as a reply to this sales lead forum.

Filter Entries

A well-used sales account manager forum holds a lot of data. One of the powers of Forum is its ability to display only those entries that are relevant to a specific need. This is achieved most effectively through the combined use of both the filtering and the sorting tools of your forum.

In addition to the default sorting tools of a standard discussion forum, the sales account manager forum has pre-set filters that correspond to filter values that you assign to a contact. You can filter a folder so that it displays entries that fall into a certain category (business, personal, or employee contacts, for example).

To filter the entries shown at the folder level of your sales account manager, do the following:

1. From your discussion forum, click on the title of the sales account manager forum.

   Your browser displays the top folder of this forum.
2. In the Filters row, click on the name of a filter.

   Directly below the Filters row, Forum opens a select box for each filter.
3. Select the filter values you wish to use to filter the entries.

   You can filter entries using different combinations of the filter values. For example, if you have a Category filter and a Location filter, you can select Personal and Spain to view personal contacts who live in Spain.
4. Once you have selected the filter values you want, click on the **OK** button just below the drop-down menus.

   Your browser now displays the sales account manager's folder-level view. Only the entries that have values that match your filter criteria appear.

In addition to viewing selective entries by filtering them, you can also sort entries to view them in a specific order. For example, suppose that you want to sort your filtered entries in alphabetical order by title. To do so, you click on the linked Title header at the top of the Title column in the folder listing. If you want to see these entries in reverse alphabetical order, click on the Title link again.

Create Personal Filters

You can add your own user filters to the folder view. These filters are viewable only by their creator.

To create a user filter, do the following:

1. In the folder-level view, click on the **Add/modify/delete filters** link in the User Filters row, all the way to the right.

   Your browser displays the Configure Filters page.
2. Click on the **Add** button.

   Your browser displays the "Specify the search command to be used as the filter" page.
3. Give your new filter a name and fill out the form to specify the properties of your search command. Be as specific as you choose.
4. When you have completed the form, click on the **OK** button.

Your browser redisplays your folder-level view. The name of your new filter now appears in the User Filters row, and it is activated.

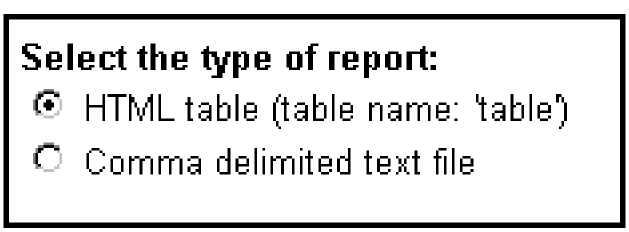
Generate a Report

You can use the report writer tool to save data from a discussion forum in a format that can be imported into an Access database or an Excel spreadsheet. The report writer uses the results of a search query to output a report in a comma-delimited format suitable for input into Excel or an HTML table suitable for MS Access.

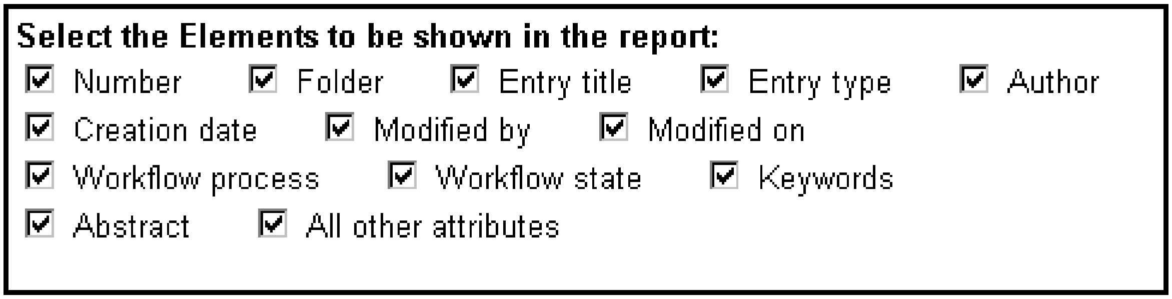
To create a report, for example, a status report for action on weekly sales leads, perform the following steps:

1. From your sales lead discussion forum, click on the **Tools** menu.
2. Click on the **Report writer** menu item.

   The Report writer form appears.
3. Select the format of the results: and HTML table (this can be saved as an xls file) or a comma-delimited text file.



4. Select (or remove checks from) the elements to be shown in the report:



   The elements are table heads. You may find that you need only a subset of the data for a weekly status report.

Enter your search query and search qualifiers, click on the **OK** button, then save the resulting output to a file using your browser's 'Save As' facility. Then read that file directly into Excel specifying a comma-delimited format.

You can use the report writer to generate weekly status reports for sales that are pending, closed, and still need work.

Glossary

The following is a list of Forum and WebWorkZone terminology and definitions:

bookmark

A tool that allows you to keep track of discussion-forum entries that interest you, so that you can return to them easily in the future.

business card

The portion of a registered user's user profile that is publicly viewable. This usually includes the person's name, organization, e-mail address, and (optionally) a picture.

chat room

A forum that provides a general category for one or more chat sessions. For example, an Engineering Workspace may have chat rooms for UI Design, Quality Review, and New Development. A Marketing Workspace may have chat rooms for PR, TV Advertisements, Print Advertisements, and more.

chat session

One synchronous (everyone participates at the same time) discussion. When people are chatting, the session is an active session. When the discussion is finished, the chat-forum manager can indicate that the session is now an inactive session. Our software stores the transcripts of all chat sessions in case you need to refer to them in the future.

entries

One piece of information contained in a forum. Examples from a discussion include a topic, a reply, a document, a URL, or a survey question. Other examples include a calendar appointment or a chat session.

entry creator

The person who created an entry. This term is also applied to the manager who created a workspace or a forum.

entry owner

The person who is assigned ownership of the entry. (By default, the entry creator is its owner.)

forums

Virtual meeting-places in which you communicate and collaborate with your teammates. Examples of forums include discussions, chat rooms, tasks, messaging, and calendars. These online forums are similar to the classic definition of the word:

> *forum*: a public place or medium for open discussions

You access forums by clicking on the forum tab and then selecting the individual forum from the drop-down list. For example, when you click on the Discussions tab, you see a drop-down list of available discussion forums. You can then click on the title of the discussion you wish to view.

The terms *forum* and *resource* are interchangeable.

forum manager (Forum only)

A person who performs the initial configuration of a forum and who has the right to perform management tasks (such as setting access or deleting entries) in that forum.

meeting

One of two kinds of *synchronous communication* supported by Forum: a *chat session* or a meeting in the *PlaceWare forum*.

personal pages

Pages that contain information for your personal use, such as your personal calendar.

You access your personal pages by clicking on the Workspace tab and then clicking on the hyperlinked title of the personal page you wish to view.

PlaceWare forum

SiteScape's integration with PlaceWare, a company that provides *web conferencing* services. The Placeware integration allows you to schedule and attend PlaceWare meetings from within the context of Forum.

You access the PlaceWare forum, if a forum manager has configured it, by clicking on the Meetings tab and then clicking on PlaceWare Meetings.

reminder

An e-mail message that documents an appointment or event that you want to remember. Our software can send reminders on or before the date of the event.

resources (WebWorkZone only)

Forums (discussions, calendars, chat rooms, or the messaging window). Sometimes used to refer to summary pages and tools.

The terms *resource* and *forum* are interchangeable.

resource manager (WebWorkZone only)

A person who performs the initial configuration of a forum and who has the right to perform management tasks (such as setting access or deleting entries) in that forum.

search

A tool that allows you to search for an entry that contains a search string or that matches other criteria (a particular author, a creation or modification date, and more).

site map

A tool that displays a list of all of the forums and personal pages available to you in all of the workspaces in the zone.

summary pages

Forum and WebWorkZone pages that provide a concise display of summary information about your workspace or about forums that are important to you.

Examples include the Workspace page and the "My summary" page. The Workspace page gives you a list of all of the forums and personal pages available to you in that workspace. The "My summary" page allows you to track new or modified entries in the discussions that are most important to you. The "My summary" page also lists the calendar entries and chat sessions for the current day or week, and more.

To access the Workspace page, click on the Workspace tab. Forum displays a page in sections. The left section is a directory tree that lists all of the workspaces that are available to you. As is standard in most folder directories, a plus sign next to an item indicates that it can be expanded, and items indented are sub-items of the item above. The green arrow to the left of the directory tree indicates which item you are currently viewing. The right frame lists all of the forums to which you have access in that space. To view a forum, click on its title.

synchronous communication

An online meeting or chat in which two or more people participate and communicate with one another at the same time over the Internet.

task

An activity assigned to a user. Our software indicates when the task is started, almost due, completed, or overdue. Optionally, our software can send e-mail to assigned users that informs them about the creation or the due date of the task.

tools

Items that assist you in using our software regardless of the current workspace. The tools are located in the upper-right corner of the page and include Web files, Site map, Bookmarks, Search, Help, and Logout. To access a tool, click on its title.

user profile

Information about yourself that you specify when you register. This information includes your name, e-mail address, group membership, a picture (optional), and more. If you choose, you can modify the information in your user profile.

WebWorkZone

A hosted collaboration service that provides you with online forums, summary pages, and tools. WebWorkZone enables you to communicate and to work quickly and efficiently with your teammates.

web conferencing

An online meeting in which you can share the real-time view of your computer screen with others to demonstrate new software, give a web seminar, and hold a variety of other types of presentations over the Internet.

web files

A tool that allows you to transfer files across the web or to share files with your teammates. For example, at work, you can upload documents to your web-file system, and then access and edit them on your home computer. As another example, you can share the files in your web-file system with teammates located around the world.

wizards

Specially designed pages that provide extra assistance when performing the most common management tasks, such as creating workspaces, creating groups, creating forums, and more.

workflow

A customization that enables your forum managers to create discussion-forum entries that pass through various states in a work process. These entries automatically move through a well-defined, orderly process, guided by actions that specific users take on the entries.

Examples of workflow processes are a purchase-order process, a document-review process, a customer service desk, and more. The steps through which the entry must move are called states. At every state, it is possible to define the process so that only those people who must take action on the item are allowed to see it. It is also possible to have our software automatically notify someone when a workflow entry requires their attention (for example, the supervisor can be notified through e-mail when one of her employees places a purchase request in our software).

Workflow entries are very similar to standard entries in a discussion. Sometimes, people perform "work" on the workflow entry by answering a special workflow question, which is located toward the top of the entry. The top of the entry also contains a label specifying the entry's current state.

workspace

A collection of summary pages and forums that one group uses to work toward a common goal. Consider workspaces to be online office spaces. Just as the Engineering Department and the Marketing Department may be located on separate floors of an office building, your zone manager can create an Engineering Workspace primarily for engineers and a Marketing Workspace primarily for marketing professionals.

One person can be a member of more than one workspace. You can access other workspaces from the Workspace page.

workspace manager

A person who can perform initial configuration of the workspace by creating discussions, calendars, and chat rooms; and then specifying who has access to these resources. By default, the workspace manager also has the right to perform management tasks in all forums in the workspace.

zone

All workspaces available to your organization, and all of the registered users who can access one or more of those workspaces. In other words, everything and everybody.

zone manager

Forum

The person who performs the initial configuration of Forum, invites users to participate, and, by default, has the right to perform management tasks in all workspaces and forums.

WebWorkZone

The person who signs up for WebWorkZone, performs the initial configuration of WebWorkZone, invites users to participate, and, by default, has the right to perform management tasks in all workspaces and forums.

zone workspace

The first workspace you enter when you log in. This workspace is the one that is usually accessible to all members of your organization (additional workspaces are usually accessible to subgroups within your organization).

Index

A

additional assistance vi
advanced search 19
anonymous user 2
appointments 30
  repeating 30
  scheduling 30
attachments 6
  add 1

B

bookmarks 12, 25, 55
  add 25
  attach 25
  view 25
Boolean search 19
business card 55

C

calendars 29–32
  merge 32
  set all-day event 30
  track appointments 10
chat 55
chat rooms
  inactive 10
  transcripts 10
child workspace 4
collaboration 1
  synchronous 10
commands
  custom 48
contact card
  add a note 50
conventions v
custom commands 48

D

default workspace
  zone 3
delete entries 23–24
discussion forums
  customized 46
  types of 23
discussions
  add replies 6
  filtered 47
  moderated 47
  threaded 9
document
  co-author 35
  locking 35
  private 40
  public 40
  review process 39
  versioning 35
document review
  create reviewers list 41

E

edit
  in-place 35
editors
  HTML 5
  wysiwyg 5
e-mail notifications 1, 7

digest style 8
disable 7
enable 8
individual message style 8
schedule 8
entries 55
filters 48
mark as seen 23
search for 17
types of 23
unseen 20, 22
entry types
discussion topic 5
document 5
surveys 5
URLs 5
event
set 30

F

file
upload multiple files 11
filter
create 52
filtered discussion 47
folder 5
organization 5
subfolders 5
Forum
add topic 1
administrator 2
enable e-mail 1
navigate 1
forum types
discussions 9
forums 4, 9–11, 56
access 9
calendars 10
chat rooms 10
description 9
discussions 9
messaging 10
summary page 10
tasks 10
tools 11
bookmarks 12
help 12
logout 12
search 12
site map 11
tracker 11
web files 11
types of 23
workspace page 10

G

glossary 55

H

help vi
help system 12
HTML editor 5

I

information hierarchy 9
Internet 1

J

Java Plug-in 9

L

leads
sort 48

List unseen 20
log in 1
logout link 12

M
merging calendars 32
messaging 10
modifying user profile. *See* user profile
more information vi
My summary 12
  initialize 13
  modify 13

N
new entries 20
Next unseen 20
notifications
  enable 7

P
parent workspace 4
personal calendar 29–30
personal page 10
Personal Space 29, 56
pictures v
Preferences 13

R
register 1
  first-time user 2
registered users 2
reminders 26, 56
  delete 28
  edit 27
  e-mail notification 26
remove entries 23–24
repeating appointments 31–??
reply 6
report
  generate 52
report writer 52
review process
  private 40
  public 40

S
sales account card 49
scheduling an appointment 30–??
search 12, 19, 57
  advanced 12, 19
  Boolean 19
  entry number 18
  for an entry 17
  relevance 18
  single forum 19
  wildcard 20
Search all 12
search page 18
Set Notification 7
signature line 7
site map 11, 57
SiteScape
  URL 2
SiteScape Forum 1
special operators
  AND 19
  AND NOT 19
  NEAR 20
  OR 19
states
  define new 46
summary list
  unseen entries 22
summary page 10, 12
synchronous collaboration 10

T

tab
  discussions 4
tasks
  assign 10
  completion 27
  delete 28
  due date 26
  edit 27
  e-mail reminders 26
  indicators 26
  private 27
  public 27
  start date 26
tool
  collaboration 1
toolbar item
  preferences 13
tools 11
topic
  adding 5
tracker 11
tracking information 20

U

unseen feature 20
Unseen icon 23
user
  anonymous 2
  registered 2
user profile 29, 33
username
  format 2

V

view
  modified entries 17
  new entries 17

W

web files 11
WebWorkZone 1, 55
wildcard character
  character
    wildcard 20
workflow
  daily update 50
  definition 45
  sales lead 45
  state 46
workflow process
  add document review 42
  document review 42
workspace page 10
workspaces 3, 4, 29
  child 4
  default 3
  green arrow 4
  hierarchy 4
  navigate 4
  parent 4
  view 1
wysiwyg editor 5

Z

zone workspace 3