Getting Started Guide for Forum Managers

SiteScape Product Documentation

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Table of Content

About this Manual

This manual describes the minimum required configuration to enable the default features of the SiteScape software, and it provides overview information that can guide further, optional configuration and customization of the software.

Products Described in this Manual

This manual describes initial configuration steps for the following SiteScape products:

- Forum ZX allows you to determine your teammates' presence, create instant meetings based on participation in a discussion, and the ability to share the meeting materials with teammates by posting them back into the discussion.
- Forum ST, which provides the same asynchronous platform for agile and adaptable online teamwork as Forum ZX.
- WebWorkZone, which is SiteScape's hosted, subscription-based environment, which runs the Forum software.

References to "Forum" refer to all three products, unless otherwise stated.

Who Should Read this Manual

This manual is designed for:

- IT professionals, or people experienced with user-interface (UI) management of end-user, client-server software in a workgroup setting.
- People who know the password to the wf_admin account and who are permitted to use it.
- People who have mastered the material in SiteScape's *User Guide* PDF.

Contents of this Manual

This manual provides information about the following:

- Chapter 1: Configuring SiteScape Software

  This manual explains how to set up your zone so that the software's default features are enabled.

- Chapter 2:

  You can use SiteScape's access-control tools to specify who is allowed to view information and perform various tasks in your zone.

- Chapter 3: Next Steps

  This chapter provides information about how you might further configure or customize Forum.

- Appendix A: Signing up for WebWorkZone

  This appendix provides information for customers who have not yet signed up for WebWorkZone and who wish to do so.

Conventions Used in this Manual

This manual uses the following conventions:

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

More Information

You may find more information in the following components of the SiteScape product documentation, which is accessible from links within Forum or from SiteScape's Help web site:

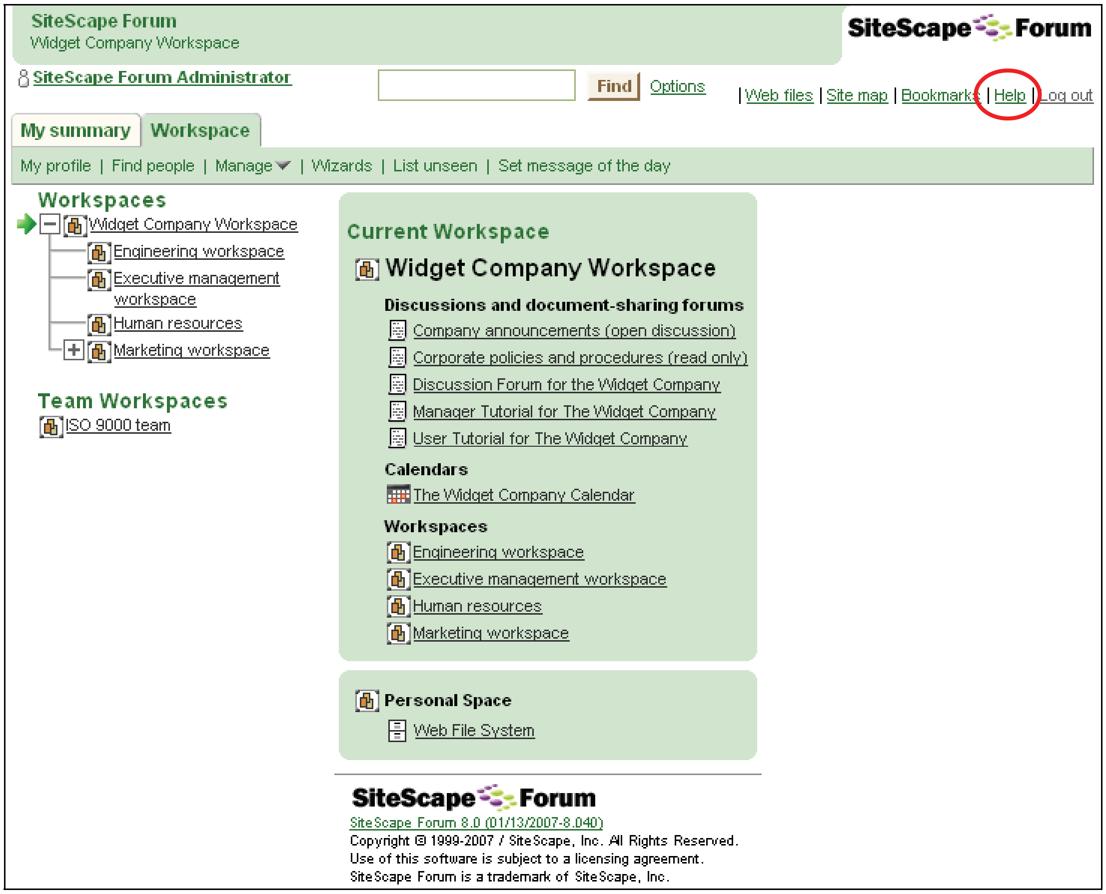
- The user and manager Help systems for Forum.
- The templates and Toolkit Help systems, for those who wish to program Forum customizations.

Additionally, Forum has several online documents that are available:

- The *Installation Guide* for Forum.
- *Quick Tips* for new Forum users.
- The *User Guide*, for new Forum users.
- *Making Teams Work*, for Forum managers who want to ensure that their configuration of Forum meets their teams' requirements.

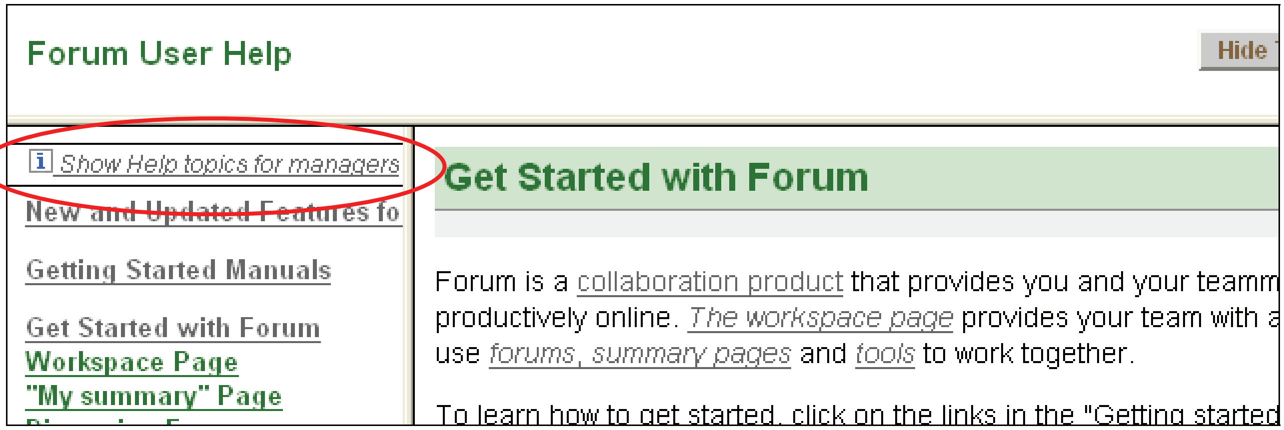
- *Getting Started with Workflow*, for nonprogrammer managers of Forum who wish to automate their business processes and create dedicated applications in Forum.

The Forum online documents may be found from within the Forum Help system. To access the Forum Help system, after logging in (described later in this manual), click the **Help** link:



In either the User or Manager Help systems, click the **Getting Started Manuals** link to access copies of the online documents listed above:

To access the Manager Help system, click the **Show Help topics for managers** link at the top of the table of contents:



In addition to reading the information provided in this manual, SiteScape invites you to visit the Help web site. Customers with maintenance contracts can also participate in SiteScape's support and customization forums. These forums provide a greater level of detail, collaborative exchanges with SiteScape engineers and with members of the support team, and the most up-to-date information available about SiteScape products and services.

For more information, visit the following URLs:

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

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

Chapter 1: Configuring SiteScape Software

Before your users can begin using SiteScape software, you need to perform the initial configuration tasks described in this chapter.

In This Chapter

This chapter describes the steps necessary to set up SiteScape software so that all default features are operable. The chapter contains the sections described in this table.

Task	Description
Log in as a Manager	After you log in to the zone-management account, you can perform all of the management tasks for the zone and the current workspace.
Set Access to the Zone Workspace	You need to decide who can view the zone workspace, which is the initial workspace in the zone's hierarchy.
Specify the Outgoing E-Mail Server	You must specify an outgoing e-mail server to be able to invite users to the zone, and to use features such as "I forgot my password," e-mail notifications, and more.
Optional Configuration Choices	There are various optional features that you can enable or disable to change the zone appearance and functionality to meet the needs of your organization's teams.
Invite Users to the Zone	After you provide the e-mail addresses of your users, the software sends users a link to pages that guide them through the registration process.
Enable E-Mail Notification	Users cannot receive e-mail notification of new or modified entries in a discussion forum until you enable this feature.

Task	Description
Learn About Next Steps	SiteScape provides additional configuration, information-design, and customization information that you can use to enhance your teams' experience of Forum

Log in as a Manager

You need to log in using a zone-management account in order to set up Forum for your users.

To log in using the default zone-management account:

1. Enter this URL in the browser window:

    `http://<yourCompany.com>/<ssf>/<zone1>/dispatch.cgi`

    Note: *Replace the variables above with values specified during installation.*

    The login box appears.
2. In the "Login name" box, enter:

    `wf_admin`
3. In the Password box, enter the password specified upon Forum installation.
4. Click the Login button.

    The zone-workspace page appears. You are now logged in.

In the upper-left corner of the page, a **SiteScape Forum Manager** link appears. This is the name associated with the default management account (wf_admin). When the name appears in the upper-left corner, you are logged into the system. (You can change the name "SiteScape Forum Manager" by modifying the user profile for the wf_admin account.)

When you begin managing Forum, there are only two management levels: site managers (who manage the server machine) and zone managers.

By default, wf_admin is the only member of the Administrators group for the initial zone; if you create an additional zone, then the zone creator and wf_admin are both members of the Administrators group. Members of the Administrators group have the right to perform zone-management tasks. If you choose, you can add other members to this group, so that they can help manage the zone.

Management Levels

Although it is possible have members of the Administrators group manage everything, this strategy becomes problematic as you create more workspaces and forums. At that point, it is helpful to delegate workspace management and the management of individual resources.

The Forum management levels and the default tasks that managers at those levels may perform are:

- Site Managers

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

  Because site managers work directly with the server, there is no management menu specifically designed for them. Usually, site managers are also zone managers.

- Zone Managers

  Primarily responsible for performing the initial setup of the zone managing users and groups, creating workspaces, delegating management, customizing the zone using templates, and assisting the discussion-forum managers with the creation of initial custom commands and workflow processes.

- Workspace Managers

  Responsible for creating and deleting forums in a workspace, determining which forums appear in the workspace, viewing auditing information about the workspace, customizing the workspace using templates, and creating or deleting additional workspaces.

- Forum Managers

  Responsible for managing a single forum. The responsibilities vary according to the type of forum being managed (discussion, calendar, tasks, and so on). Forum managers can modify access controls for the forum and allow or prevent viewing, participation, and other actions.

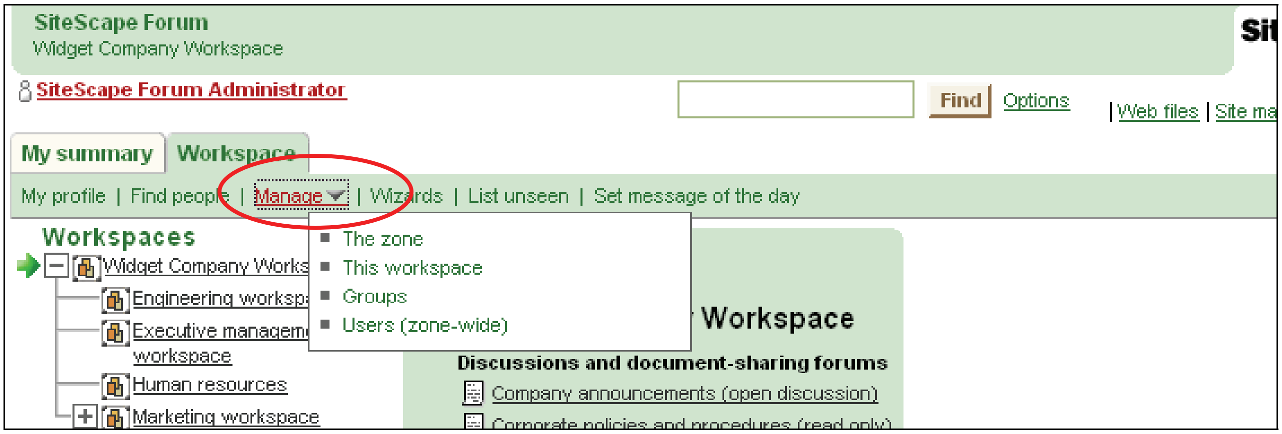
  Managing a discussion forum requires more effort than managing other kinds of forums. These managers are responsible for auditing activity, deleting or moving entries, defining global keywords for users, managing the schedule for e-mail notifications, defining new commands and workflow processes, adding or removing columns in the list of entries, customizing the forum using templates, running reports about content in the discussion forum, and managing the e-mail posting of forum entries.

Additional information about delegating management is available in the online Manager Help system, in the **Workspace Organization** section.

Using the Forum Management Menus

The Forum management menus are designed to provide you with a maximum amount of flexibility when managing resources for your teams.

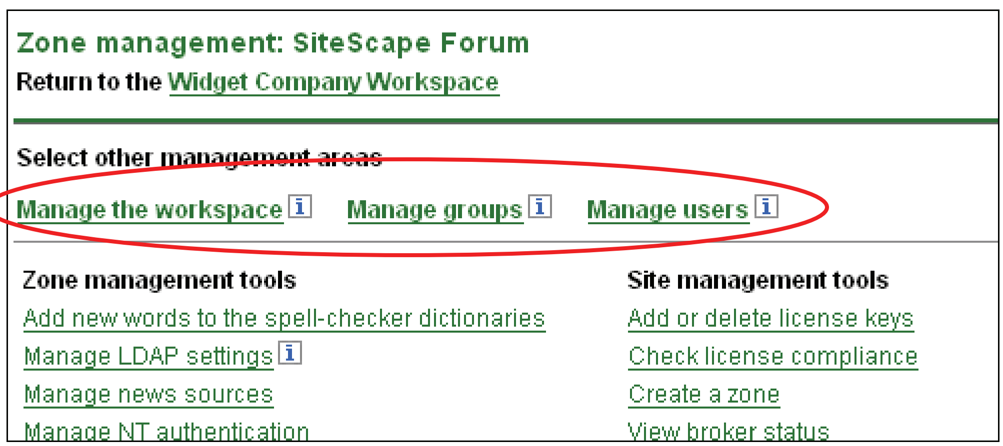
To access the management menus, click the **Manage** toolbar item:



The Manage drop-down menu provides you with access to pages that allow you to manage:

- The zone
- The current workspace
- Groups (available across the zone)
- Users (available across the zone)

SiteScape provides navigation links at the top of the management pages, which allow you to move quickly from one type of management to another:



Use the links shown above to manage zones, workspaces, groups, or users. To return to the current workspace, click the linked title of the workspace located in the top left area of the page.

Set Access to the Zone Workspace

One of your first tasks as a zone manager is to decide who can view and participate in the zone workspace. For example, you may choose to prevent anonymous users from viewing any entries in the zone.

To change the default access to the zone workspace:

1. From the zone-workspace page, click the **Manage** toolbar item and choose **This workspace**.

   The zone-management page appears.

2. In the “Manage access control” section of the page, click **Set workspace access control**.

   The remaining instructions in this manual describe how to access management tools using a table such as the one below. This table summarizes the last two steps:

   Manage > This workspace

   Navigation:

Look for…	*Click…*
Manage access control	**Set workspace access control**

3. In the Visitors column, click the **Anonymous users** checkbox to disable anonymous access.
4. Click **Remove selected groups from roles**.

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

   To return to the zone-workspace page, click the title at the top of the page.

Specify the Outgoing E-Mail Server

You must specify information about the outgoing e-mail server to enable the following Forum features:

- I forgot my password (Forum e-mails you a new password)
- Invite users to the zone
- Send mail
- E-mail notifications from discussion forums
- E-mail notifications related to workflow processes
- E-mail notifications related to tasks and reminders

To specify the outgoing e-mail server:

Manage > This zone

Navigation:

Look for…	*Click…*
Manage e-mail settings	**Manage outgoing e-mail settings**

1. Specify the name of the computer that runs the outgoing SMTP e-mail server software.

   If you do not know the name, contact your system or network administrator. If the computer on which you installed Forum also runs an e-mail server, specify:

   ```
   localhost
   ```

2. Change the default port number if necessary.

   When you complete the form, Forum checks if the server and port information is valid. If it is not correct, contact your system or network administrator.

3. Enter a default "from" e-mail address.

   If the SMTP e-mail server determines that it cannot deliver an e-mail message, it returns the message to this address.

   If Forum fails to contact the SMTP e-mail server after one day, an e-mail error log is created. (You can check the error logs from the zone-management page, using the **View e-mail error logs** link.)

4. Click **OK**.

Optional Configuration Choices

There are additional, optional ways that you can configure your zone so that it reflects the values or working style of your organization. You may also want to add greetings or instructions to the pages, so that your zone is more inviting to users. Consider using these management pages:

Select features for this zone (zone-management page)

Allows you to prevent anonymous users from accessing the zone or registering, to prevent users from uploading files, to prevent the use of bookmarks, to disable the "To-do lists" tab, and more.

Modify zone name, graphic, fonts, and colors (zone-management page)

Allows you to change the name of the zone, upload your company logo for display in the banner, set the color theme, and set the font size.

Modify workspace appearance (workspace-management page)

Allows you to change the name of the current workspace, add different greetings for anonymous and registered users, and add text at the bottom of the workspace page.

You can use this page to provide text to orient your users to the zone-workspace page. For example, if you disable anonymous access to the zone, you may want to provide a greeting for anonymous users that includes the e-mail address of the person who can register a username and password for them.

Set the message of the day (workspace-management page**)**

Allows you to set a brief message for your users that expires after a specified period of time.

To further personalize your Forum installation to make it more inviting for new users:

- In the discussion forum, modify the folder abstract to include a welcome to users, a description of the purpose of the forum, and instructions for users about which links to click on. Then, add an introductory entry outlining the subjects to be discussed and perhaps some rules for the forum. Add another entry inviting users to "sign in" by adding replies to introduce themselves.
- Add some new usage tips to the User Tutorial forum, such as practical advice about using Forum to accomplish tasks specific to your organization.
- If you are using the version of Forum that includes Zon support, you can create a discussion topic for those who wish to participate in an online meeting, post information to be read or discussed before the meeting, use the UI to start the meeting from From, and then post the meeting log and materials back into the topic when the meeting is complete.

Enable E-mail Notifications

One of the most effective ways for users to track new and changed entries in a discussion forum is to have Forum send them e-mail notifications. E-mail notifications provide a summary of recent activities in the forum, along with links to the new or changed entries.

To allow users to receive notifications, you must configure the discussion forum to send them. From the discussion forum, access the Tools toolbar option, and then click the Administration link:

Tools > Administration

Navigation:

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

1. In the "Set notification message content level" section, click the **Send titles only** or the **Send titles and summaries** radio button.

   If you choose **Send titles and summaries**, the e-mail message includes a few lines from the entry. You must specify the number of lines to be included. SiteScape recommends that you specify not more than 10 lines so as not to overload the server.
2. In the "Set the mail notification schedule" section, click the checkboxes of the days on which Forum is to send notifications.

3. In the same section, specify the time Forum is to send notifications. The times that you specify apply to each day that you selected. Use 24-hour format, and separate the hour value from the minute value using a colon (:).

   For example, this schedule sends notifications every hour and a half during an average working day, according to the time on the server:

   ```
   09:00   10:30   12:00   13:30   15:00   16:30
   ```

4. You can add users to the distribution list. Users can also enable their own notifications from the discussion forum by choosing **Set notification** from the **Tools** menu as described in the user Help system.
5. At the bottom of the form, click **OK**.

   The e-mail notification schedule is set for this forum.

Invite Users to the Zone

1. If your user profile does not include an e-mail address, you must add one so that users can reply to your invitations if they have questions.
2. From the workspace page or the "My summary" page, click the **Wizards** toolbar item.
3. On the wizard menu, click the **Invite users to join the zone** link.

   Note*: If this link does not appear on the Wizard menu and you are running Forum, you must specify your e-mail server.*

4. Optionally, you can change the default wording of the e-mail message.
5. Enter the e-mail addresses of the people you want to invite to the zone. Use one or both of the following methods:
   - Enter individual addresses in the "E-mail address" text boxes. To add boxes, click More e-mail addresses.
   - To add a list of e-mail addresses, copy and paste the list to the "You may also enter multiple e-mail addresses..." text box, then separate the addresses with commas.
6. Click **Next**.
7. Review the information on the Summary page, and then click **Finish**.
8. Click **Close** to exit the Congratulations page.

Your users receive an e-mail invitation with the text you specified and a link to the Forum registration wizard. They use this wizard to provide a username, password, and additional information. After users register, they are logged in to Forum.

Learn About Next Steps

Now that you have set up your zone, SiteScape recommends that you learn more about facilitating and optimizing the long-range use of Forum by reading the following online manuals:

- *Making Teams Work*

  This manual covers issues that go beyond management and configuration, to address how to optimize your teams' use of Forum. One primary concept is to balance providing your teams with structure (such as a workspace hierarchy and dedicated applications created before team members ever access the zone) with a more informal, organic process (one in which teams create norms for Forum use and have input to workflow-process definitions). After deployment of Forum, the result should be an online space that your teams find intuitive, helpful in completing work effectively, flexible in ways that match a team's natural agility, and appropriately open to sharing information within the team and across the organization's matrix of teams.

- *Workflow Tutorial*

  This tutorial teaches you how to automate your teams' common business processes, and how to use discussion forums to create powerful, dedicated applications.

To access these manuals, open the Help system and click **Getting Started Manuals.**

Chapter 2: Creating Forums

In addition to being a very powerful collaboration tool, Forum's standard discussion forum is also an application platform. Using configuration choices and customizations, you can create dedicated applications for your organization. (Dedicated applications are very focused, and allow the creation of only one type of entry, where as a standard discussion forum allows four standard entry types and an unlimited number of custom entry types.)

SiteScape uses the discussion-forum platform to create *specialized forums*. Examples of the specialized forums include:

- Filtered discussion forum
- Help-desk forum
- Moderated discussion forum
- Resume-tracker forums
- Sales-account-manager forums

These forums are also derivatives of the standard discussion forum:

- Blog forum
- Wiki forum
- User tutorial
- Manager tutorial

To create any of these types of forums, navigate to this management page:

Manage > This workspace

Navigation:

Look for…	*Click…*
Manage resources in this worspace	**Create a forum**

The first page of the management tool provides radio buttons for you to specify the creation of all of the standard and specialized forums except for the tutorials. If you want to create additional instances of the tutorials, click **Create other forum types** located below the radio buttons at the end of the first management page.

The sections in this chapter describe the customizations of discussion forums and why you might choose one type of forum for your organization's use.

Blog Forums

A *Blog forum* is a dedicated application that displays an author's journal entries using the popular blogging approach currently found on the Internet. An author adds a journal entry, and, depending on features enabled by the forum manager, teammates may comment on and rate the entry. Because blog entries are designed to be personal and chronological, blog forums display its list of journal entries from the most recently authored to the oldest.

Forum provides two types of blogs:

- Personal blogs

  Personal blogs appear on a user's profile page and business card. The person creating a new user profile can specify that Forum create a personal blog, or users with existing profiles can modify their profiles, specifying that they want to add a personal blog. Zone managers can disable the feature that allows end users to create personal blogs (use the "Select features for this zone" management page).

  Personal blogs look and behave identically to blog forums. By default, anyone allowed to view business cards can view and comment in someone's personal blog.

- Blog forums

  Blog forums are discussion forums that restrict user activity to the posting of journal entries, commenting on and rating journal entries, and creating folders to organize the journal entries. Blog forums provide streamlined ways of creating global keywords and adding comments. To create a blog forum, log in as a workspace manager, use the "Create a forum" management tool, and click the radio button specifying that you want a blog forum.

When managing blog forums, SiteScape highly recommends that you create global keywords that users can apply to journal entries upon creation. The use of global keywords can greatly assist users in searching for desired entries.

Users can comment on journal entries, and they can comment on comments. Comments are hierarchical in the same way that replies are hierarchical in standard discussion forums.

Wiki Forums

A *Wiki forum* is a dedicated application modeled after wiki Internet sites, the best known being Wikipedia. Wiki forums have a set of interrelated *wiki pages* (forum entries) that are coauthored by everyone who participates in the forum. In other words, all forum participants have the right to modify any wiki page. Sites using this style of coauthoring are said to be using a "free-content approach."

For the end user, wiki forums provide functions that make it easier to co-author a wiki page, review previous versions of the page, search, and add comments (forum replies) to wiki pages. The user Help system documents these unique features. However, for wiki-forum managers, the management tools are identical to a standard discussion forum.

To create a wiki forum, log in as a workspace manager, use the "Create a forum" management tool, and click the radio button specifying that you want a wiki forum.

Forum provides mechanisms that allow the authors of a wiki page to discuss the co-authoring process. However, it does not provide the nearly unlimited hierarchical reply mechanism found in a default discussion forum. Instead, participants may comment on a wiki page (this is a top-level reply). Users may then reply to that comment. The comment/reply hierarchy stops at that point; you cannot "reply to a reply."

Filtered Discussion Forums

A filtered discussion forum contains folder entries that participants can filter according to assigned attributes. Attributes are keywords defined by the discussion-forum manager that all users can apply to entries.

The management of this type of forum involves tasks that are identical to those tasks required of a standard discussion forum. However, you need to perform addition configuration tasks before users can participate in a way that is most meaningful to their work.

After you create a filtered discussion forum, you see a "User filters" row (containing filters that are specific to the current user) and a Filters row (containing filters that are available to all users in this forum). The default initial filter is called "Entry status." The initial values for "Entry status" are All, Open, Closed, Waiting for information, and unassigned. When users create new entries, they can assign one of these filter values to the entry. Users can change the filter value, indicating that the entry has entered into a different status. So, using this default configuration, members of your organization can track and label the status of entries.

Filter forums are most useful to your organization when you have a deep understanding of how your users label and process their work. This determines the list of attributes that you must create. As one example, suppose your organization wants to use a new entry status called Deferred. The forum manager can modify the "Entry status" filter to include the new value, making the forum more useful for the members of the organization.

As mentioned in the *Making Teams Work* manual, SiteScape recommends prototyping your forums before implementing them in production-ready systems. This is especially important for filtered discussions. Whereas you can move—or export and import—entries across any number of standard discussion forums, you should consider each instance of a filtered forum as its own "type" of forum. In other words, only create a production-ready filtered forum after you have thoroughly prototyped the attributes required by the teams in your organization, and do not attempt to move entries to and from filtered forums.

Many of the specialized forums are also filtered forums. If you are using only the filters defined upon creation of the forum, you may move entries back and forth between specialized forums (help desks, sales account managers, and so on).

Help-Desk Forums

The Help Desk is a dedicated, filter-based application that enables personnel at help desks, call centers, IT departments, and technical support departments to effectively manage problem reporting and resolution by eliminating communication bottlenecks.

When you actively manage requests for support, customers get speedy, accurate responses, which dramatically improve customer satisfaction. And you get peace of mind knowing that questions are automatically routed to the most appropriate technician, and that no request--big or small--is neglected.

Moderated Discussion Forums

A moderated discussion forum is not a dedicated or filtered forum. Users can create any of the standard discussion-forum entry types. However, when a user creates an entry, it does not become visible until a moderator reviews its content and designates it as being acceptable for public viewing.

Resume-Tracker Forums

Human Resource professionals work with hundreds of applications and resumes on a daily basis. Finding and utilizing the right information within these resumes can be time-consuming. Resume Tracker allows you to find the information you need quickly, and helps you keep track of the interviewing and hiring process.

SiteScape's Resume Tracker is a dedicated, filtered application that can store the full text of resumes, internal hiring policies, and a wide variety of other information. It can track each contact you have with an applicant, along with notes you and your colleagues may have taken from interviews and other conversations with the applicant. The powerful search and filtering capabilities let you locate the details you need quickly and easily.

Sales-Account-Manager Forums

The sales account manager forum is a dedicated, filter-based application that allows you to manage and track the entire cycle of a sales lead. This forum 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.

If the sales forum contains many leads, you can choose to view just a subset of the leads. 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 do this by filtering the folder-level view. The sales forum has filters that are defined by your forum managers. You can tell what the current filter values are by looking at the "Filters" row above the list of entries. In addition to these preset filters, you can define your own private filters in the "User Filters" row.

You may also want to view the leads in a different order, such as from most recent to oldest. When you reorder the leads according to specific data they contain, 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 use to filter or sort entries affect your view only. After you exit the forum, the settings that you used remain in place for your return.

Chapter 3: Controlling Access

SiteScape software provides two methods for controlling access to the zone, workspaces, and forums.

The default method is called *role-based access control.* Role-based access control associates groups with a set of access rights.

SiteScape's legacy method for controlling access is called *managing by rights*. This method allows you to map individual rights directly to one or more groups.

This chapter provides information about each type of access-control. More detailed information is available in the **Access Control** topic in the Manager Help.

Managing by Roles

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

To manage using roles, click the **access-control** link on the management pages for discussions, chat rooms, calendars, and workspaces.

The default access roles, with their default rights are:

- Visitors (read only)

  Can view information in the resource (forum, workspace, calendar, and so on), but cannot add information or use other tools that are reserved for higher-level roles.

- Participants (write)

  Can view information, add information (such as a topic or reply in a discussion forum), and send e-mail to another registered user.

- Moderators (manage, modify, and delete)

  Can view, modify, or delete all entries, add information, send e-mail to another registered user, and create team workspaces.

- Managers (manage, modify, and delete)

  Can perform management tasks for the resource, such as using the management menu, controlling access to the resource, creating additional resources such as workspaces, and using advanced tools (such as the tool to send e-mail to all registered users).

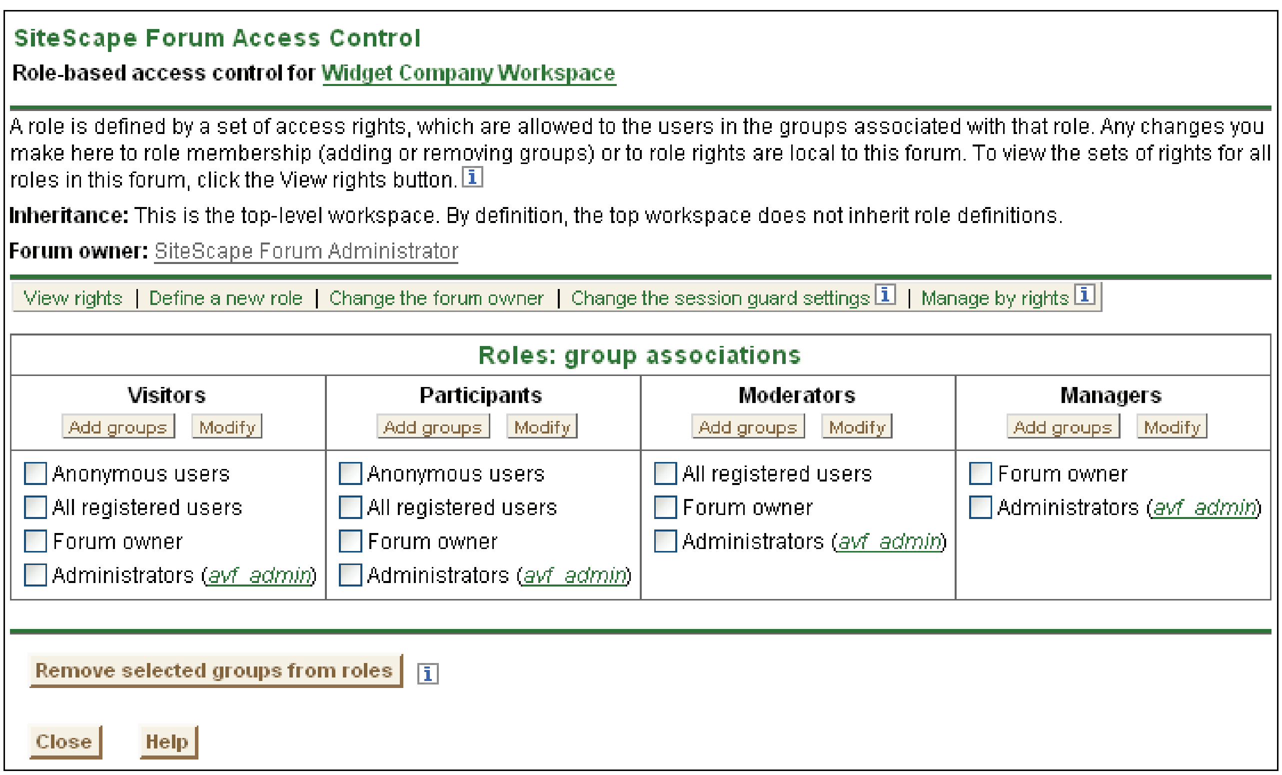
Each type of resource has a default set of rights for each role. For example, in a zone, Participants can view forums, send e-mail to registered users, and more; in a discussion forum, Participants can add entries and reply to entries.

You can change the set of rights allowed to each role (the *role definition*) locally, from within an individual resource, by clicking the **Modify rights** button, located in the header row of each column. For example, in a discussion forum, you may want to remove the right to send e-mail from the Participants role. Local changes to the role definition apply only to the current forum.

Note: *It is also possible to modify role definitions for all forums of a certain type. For more information, click **Access Control** in the Manager Help table of contents, and then click **Manage Role Definitions**.*

You can allow a resource to *inherit* membership (the groups in each role) from its parent workspace. Changes will be applied automatically through the inheritance hierarchy. For example, if you create a new workspace, it can inherit its role definitions from the main workspace.

The following is an example of a “Manage by roles” page, as accessed from the zone-workspace management page:



For more information about inheriting role membership, view the **Access Control** topic in the online Manager Help system.

Managing by Rights

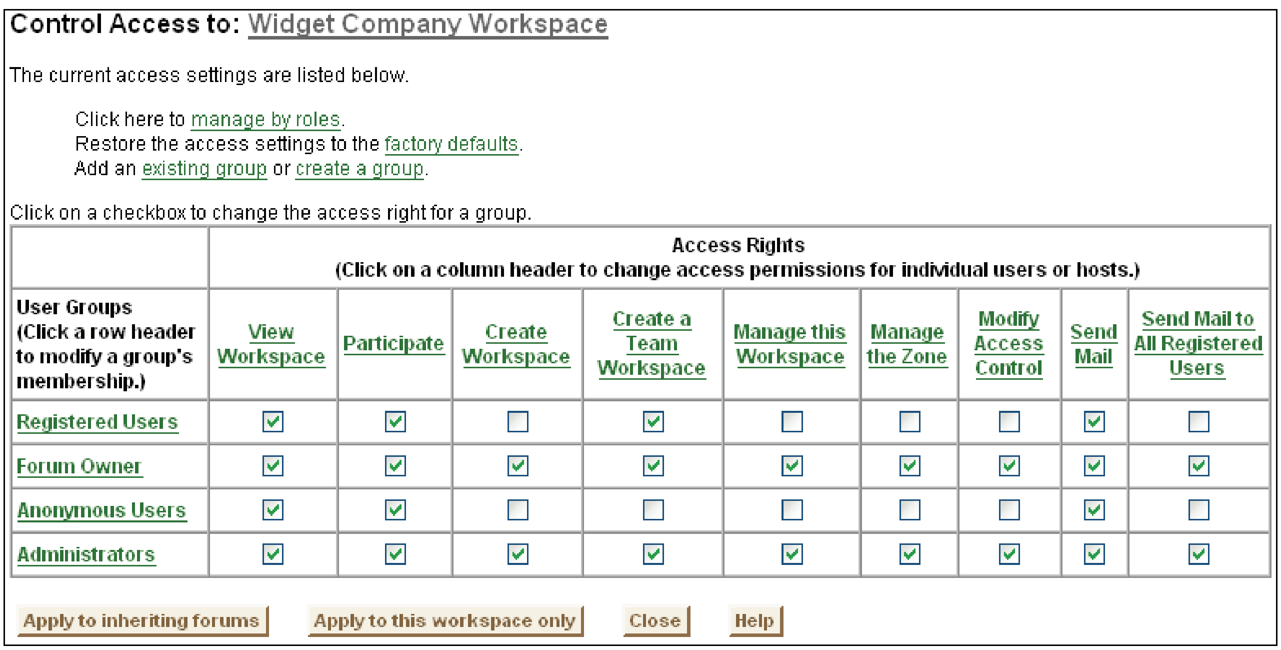
Managing by rights is another method for controlling access to resources. When you manage by rights, you work with an "Access Rights" table within an individual resource, such as a workspace or a forum. In the left-most column of the table, group names appear, one group in each row. (Some of the "groups" may be specially defined individual users.) The top row of each table displays the access rights available in that resource, one right in each column. At the intersection of each row and column is a checkbox. When you select or clear the checkbox, you allow or suspend that right for that group.

This method of access control allows you to assign to users the same set of rights you can assign using role-based access control. However, you must use the checkboxes in the table to group similar rights manually. This method is more labor-intensive, and does not offer the inheritance feature.

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

> ***Note:*** *If you upgrade to Version 7.0 from an earlier version, managing by rights is the default method. To use role-based access control, click* ***manage by roles****, located toward the top of the page.*

Below is an example of a "Manage by rights" page, as accessed from the workspace management page:



Control Access to: Widget Company Workspace

The current access settings are listed below.

Click here to manage by roles.
Restore the access settings to the factory defaults.
Add an existing group or create a group.

Click on a checkbox to change the access right for a group.

	Access Rights (Click on a column header to change access permissions for individual users or hosts.)								
User Groups (Click a row header to modify a group's membership.)	View Workspace	Participate	Create Workspace	Create a Team Workspace	Manage this Workspace	Manage the Zone	Modify Access Control	Send Mail	Send Mail to All Registered Users
Registered Users	☑	☑	☐	☑	☐	☐	☐	☑	☐
Forum Owner	☑	☑	☑	☑	☑	☑	☑	☑	☑
Anonymous Users	☑	☑	☐	☐	☐	☐	☐	☑	☐
Administrators	☑	☑	☑	☑	☑	☑	☑	☑	☑

Apply to inheriting forums | Apply to this workspace only | Close | Help

Default Users and Groups

Both methods of access control use a default set of users and groups:

- Registered Users

  Users who have a registered username.

- Forum Creator

  The user who created the forum. In this context, a "forum" could be a discussion forum, a specialized forum, a calendar, a workspace, or any of the built-in forums such as tasks or calendars.

- Forum Owner

  Initially, this is the same person who created the forum. It is possible to assign a new forum owner. You cannot assign a group as the forum owner.

- Anonymous Users

  Users who are not logged in. These users share one account, whose username is Anonymous.

- Administrators

  Users who have the right to access the management menus in all resources in the zone. By default, the first members of the Administrators group are the wf_admin user and the user who created the zone.

- Entry Creator

  The user who created an entry. In this context, an "entry" could be an entry in a discussion forum, calendar, chat room, meetings forum, or task forum.

- Entry Owner

  The user who owns an entry. By default, this is the person who created the entry, but a new owner can be assigned.

Chapter 3: Next Steps

SiteScape recommends the following work as the next steps in your management of Forum:

1. Read the *Making Teams Work* manual

   This manual covers issues that go beyond management and configuration, and that address how to optimize your teams' use of Forum. After deployment of Forum, the result should be an online space that your teams find intuitive, helpful in completing work effectively, and appropriately open to sharing information within the team and across the organization's matrix of teams.

2. Read the *Getting Started with Workflow* tutorial

   This tutorial teaches you how to automate your teams' common business processes, and how to use discussion forums to create powerful, dedicated applications.

3. Skim the Manager online help system.

   This table of contents may provide you with other ideas for ways in which to configure Forum for maximum, efficient use by your teams.

4. Investigate template customizations.

   This helps you take your customizations to the next level. You can create new commands using a *form* and a *view* template. Use the template-support routines to create form elements and to display the values provided by your users on the custom entry page. You can experiment with the added flexibility and power provided by templates, and make decisions about the most appropriate method for creating new commands for your teams.

   For more information, review the first few topics of the templates Help system (you can access this system from the support forum and from the manager Help system).

5. Investigate toolkit customizations.

   In the same way that template customizations introduce a level of flexibility and power beyond the management-page method of creating new commands, Toolkit customizations provide a level of flexibility and power beyond template customizations. Also, there are some types of customizations that should be done using only Toolkit coding (altering the tabs and the application toolbars, for example).

   For more information, review the first few topics of the Toolkit Help system (you can access this system from the support forum and from the manager Help system).

Appendix A: Signing up for WebWorkZone

When using the WebWorkZone hosted service, your first step is to sign up for a zone.

To sign up for a zone:

1. Contact sales@sitescape.com to sign up for WebWorkZone.

   You will receive a URL, username, and password. SiteScape recommends that you print this information for future reference.

2. Enter the URL in the browser window. The URL follows this format:

   `http://webworkzone.com/<zonename>`

   Note: *Replace* <`zonename`> *above with the value that you specified when you signed up for the zone.*

   The login box appears.

4. Enter your username and password, then click **Login**. (You may want to bookmark the page so that you can access it quickly in the future.)

   If you forget your password, leave the text boxes blank and click the **I forgot my password** link. WebWorkZone then sends a new password to the e-mail address that you provided when you signed up.

Although WebWorkZone is immediately usable, SiteScape recommends that you refer to the Chapter 1: Configuring SiteScape Software chapter in this manual (page 9) to make sure that your zone is optimally configured and ready for your users. For example, you may want to change the access controls to require that registered users be added to a group before they can participate (by default, anonymous users cannot participate). In addition, you might want to change the zone name, colors, and greetings.

You can find more information about WebWorkZone at https://webworkzone.com.