Forum Getting Started Guide

SiteScape Product Documentation

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Table of Contents

About this Manual

This manual describes SiteScape Forum, and it provides overview information that can guide further, optional use and customization of the software.

Products Described in this Manual

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

- Forum ZX, which combines synchronous and asynchronous online teamwork. For example, 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:

- People who will be using SiteScape Forum for the first time.
- Users who need a reference for using SiteScape Forum.

Contents of this Manual

This manual provides information about the following:

- *Chapter 1: Learning About Forum*

  Information in Forum is organized according to a hierarchy of different working spaces. After you learn about the different parts of the hierarchy, you can choose where to look for information and where to add information, and you can specify the kind of information you want to see when you first log in.

- *Chapter 2: Getting Started*

  To begin using Forum, you register and log in. You can then navigate to find the information you want, add entries and replies, and receive e-mail about forums that interest you (if your manager has enabled this feature).

- *Chapter 3: Learning Common User Tasks*

  Tasks that users perform regularly include searching for entries, viewing new entries, and using bookmarks and tasks.

- *Chapter 4: Working with Calendars*

  Tasks that users perform regularly include scheduling and viewing appointments in calendars, and sharing Forum calendar information with Microsoft Outlook.

- *Glossary*

  You will find a glossary of terms referenced at end of this document.

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.

What you see	What it means
A *workspace* is...	A new term is presented in *italic* font when it is first defined.

More Information

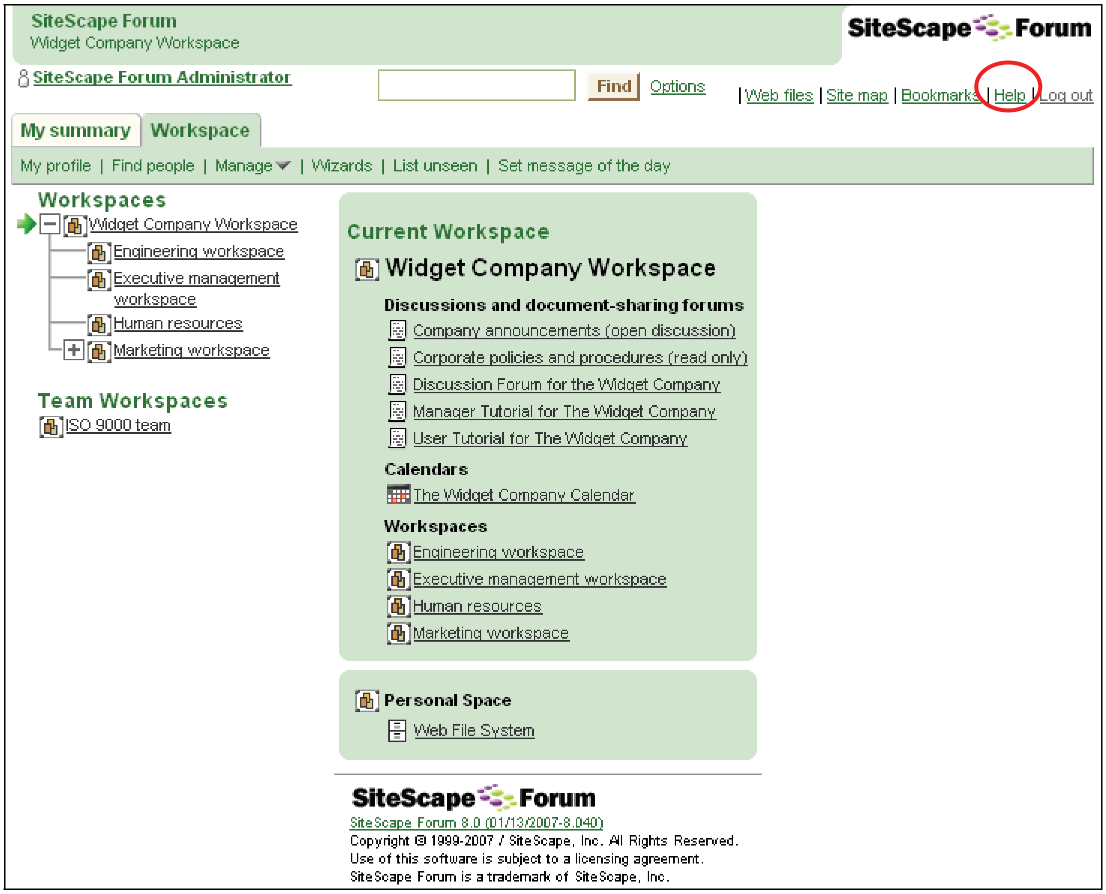
You may find more information in the following components of the SiteScape product documentation, which is accessible from links within Forum or from SiteScape's Help web site:

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

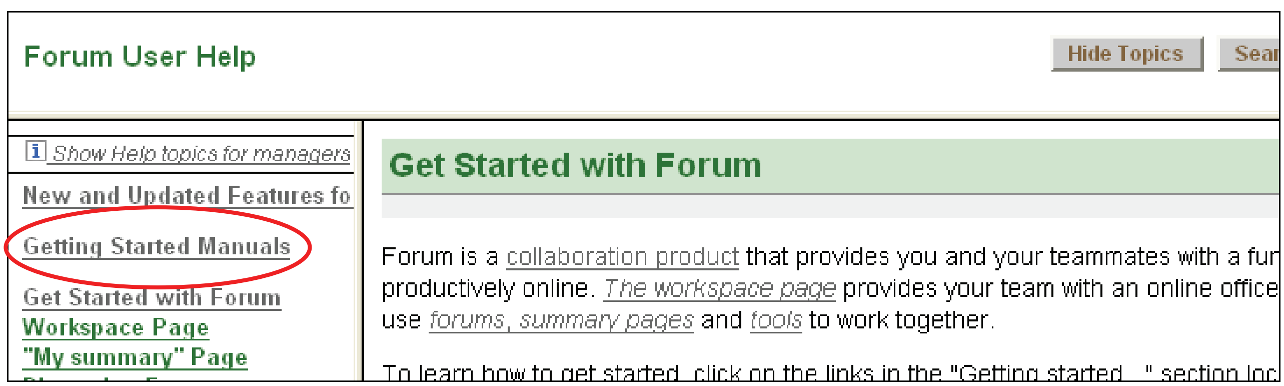
Additionally, Forum has several online documents that are available:

- 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.

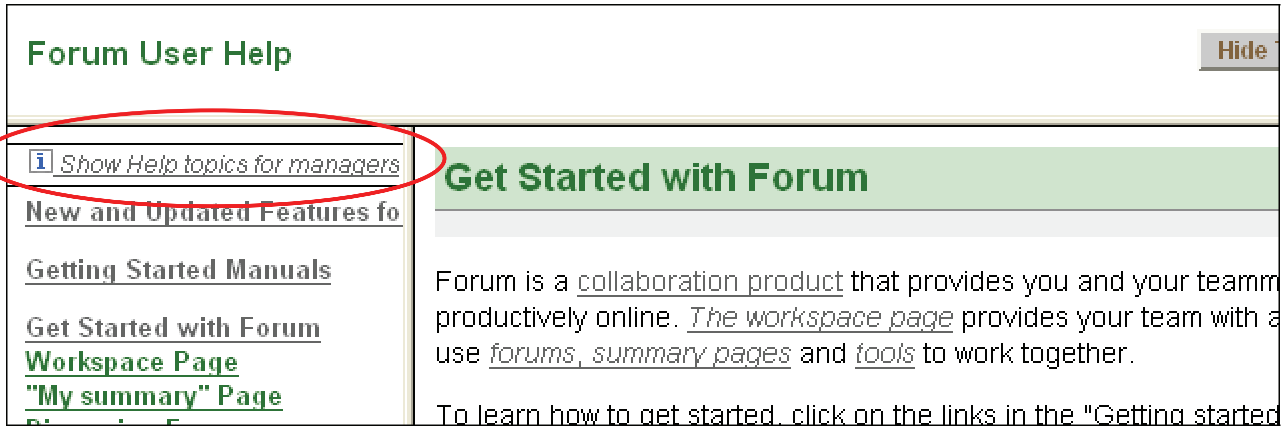
The Forum online documents may be found from within the Forum Help system. To access the Forum Help system, after logging in (described later in this manual), click the **Help** link:



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: Learning about Forum

SiteScape Forum (Forum) is a tool that provides an effective way to communicate and share resources with teams across the Internet. Forum enables you and other users to participate in a variety of online team-based activities, such as:

- Working with teammates and organizations across the Internet to achieve a goal
- Co-authoring a document
- Creating your own online team space to facilitate a project
- Scheduling meetings
- Receiving e-mail updates about recent entries in a forum that interests you
- Generating reports based on data in a forum
- Setting up tasks and reminders for yourself or for other users

Forum allows you to work within a small team, within an organization or company, across companies, or across the Internet. When you use SiteScape software, you bridge the gap between working alone at your computer and working together with your teammates.

In addition to fostering an open exchange of ideas and information, Forum records the contributions of each user, creating an invaluable reference source of your company's work, which you can locate quickly.

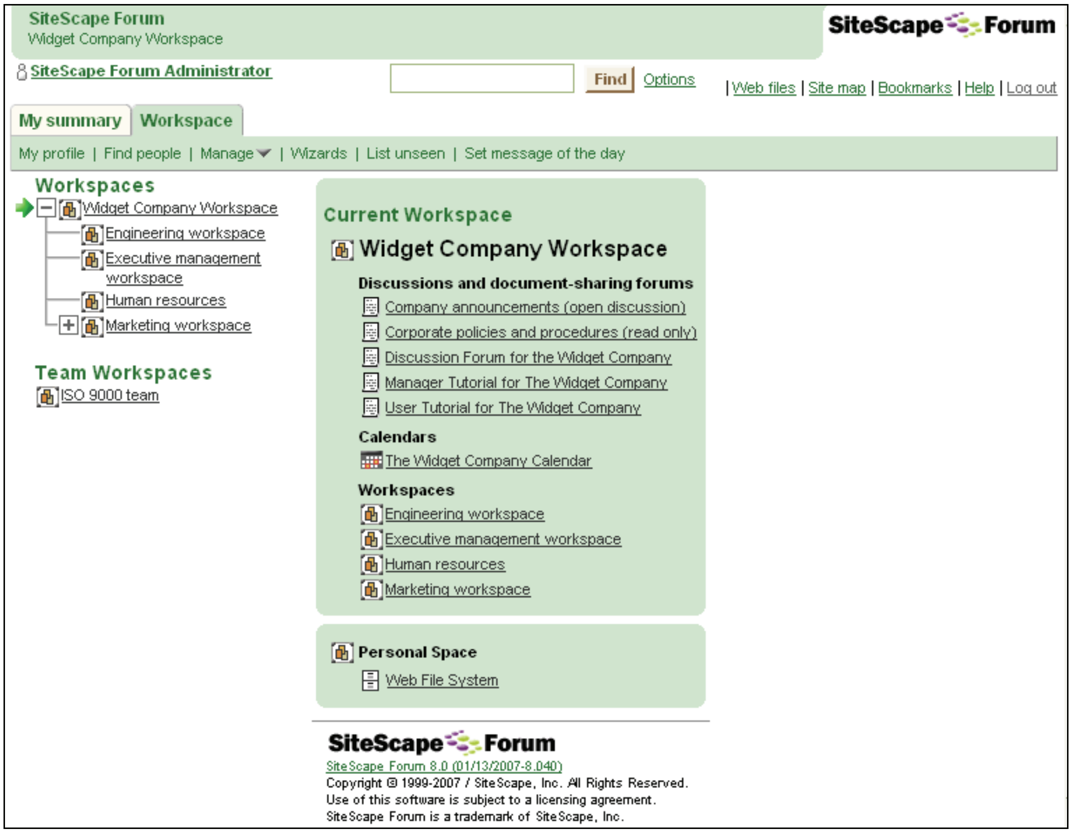
In this Chapter

This chapter provides information on the following topics:

Topic	Description
Navigating through Forum	Describes how to navigate among the various tools and forums..
Zone-wide tools	Describes the various tools and aids available to enhance your use of Forum.
Communicating with your team	Describes presence and contact features available with Forum ZX.

Navigating Through Forum

When you first log into Forum, you'll see something similar to the screen shown after this paragraph. Forum uses tabs to help you navigate quickly between applications, such as discussions, calendars, and to-do lists.



Workspace Tab

A *workspace* is a collection related forums (such as discussions and calendars) that team members can use to work toward a common goal. Workspaces are like online office spaces. Your zone may have an engineering workspace primarily for engineers and a sales workspace primarily for salespeople. The workspace page displays links so that you may navigate to all of the applications that are available to you in that workspace.

You may have access to more than one workspace. If this is the case, you will see links to additional workspaces on the left side of the workspace page. People without access do not see these links. For information about the complete list of workspaces and forums available in your organization, contact your workspace manager.

My Summary Tab

The My Summary page provides a concise display of information about the workspace and forums that you want to track and navigate to quickly. You configure the My Summary page according to your preferences.

Discussions Tab

Discussions include threaded discussion topics, documents, URLs, and surveys. Threaded discussion topics display the original discussion and any replies made. Discussion forums provide a working space in which you can combine information (files, plans, documents, URLs) with discussions about that information (replies and surveys).

This tab is optional. You may add this tab to your personal view using your user profile, which is explained in an upcoming section of this manual.

Calendars Tab

Workspace calendars are available to all of the users in a workspace, and you may be able to create personal calendars (if the zone manager has enabled this feature). You can share appointments between your Forum calendar and your Microsoft Outlook calendar by exporting entries from one calendar to the other.

This tab is optional. You may add this tab to your personal view using your user profile, which is explained in an upcoming section of this manual.

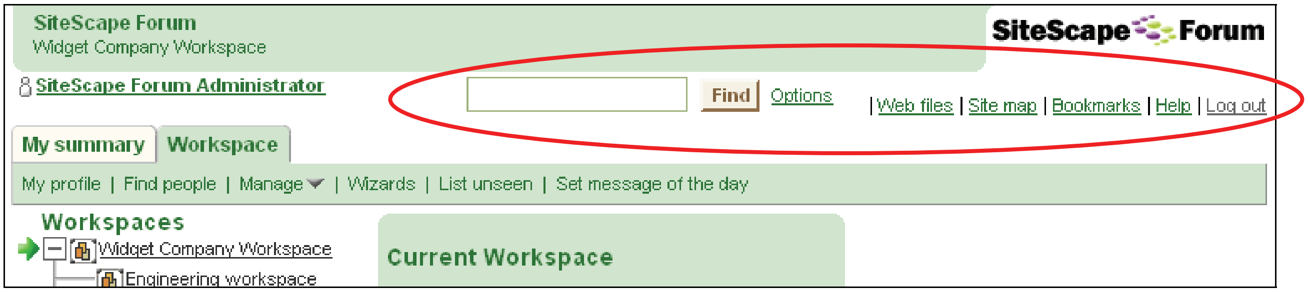
To-Do Lists Tab

To-Do Lists provide an automated way to keep track of your work. You can assign tasks and reminders to yourself or to other users. You can also attach a task to a discussion entry, so that the entry can provide documents or replies that assist in the completion of the task. Forum can notify assignees by e-mail when a task is assigned, almost due, or overdue. The To-Do list also allows you to search for any action items that have been assigned to you.

This tab is optional. You may add this tab to your personal view using your user profile, which is explained in an upcoming section of this manual.

Zone-wide Tools

A *zone* is the collection of all of the workspaces within Forum. Zones contain workspaces, calendars and other tools. Zone-wide tools are global tools that can be used across the entire zone. These tools are located above the toolbar and tabs and are available in all workspaces and forums, as shown in the picture that follows this paragraph. They are more general-purpose than the forum-specific items located on the forum toolbar.



Find

Using the **Find** tool, you can search for entries, people, and other information by entering just a few words.

Web Files

Your Web File System is a personal file-storage area that you use to transfer files to another computer or to share files. The Web File System appears in a separate browser window.

You can use your Web File System to access your files no matter where you are. For example, you can upload files at work, download and work on the files at home, and then upload the modified files so you can retrieve them at work. In addition, if enabled, you can create a shared folder in your Web File System from which other registered users can access and download files.

Site Map

The site map lists the hierarchy of workspaces and forums that you are allowed to access in the zone.

Bookmarks

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

Help

This tool opens the online Help system in a separate browser window.

Log Out

This tool logs you out and then displays the Login page.

Communicating with Your Team

Forum ZX allows you to quickly communicate with your teammates using a number of tools.

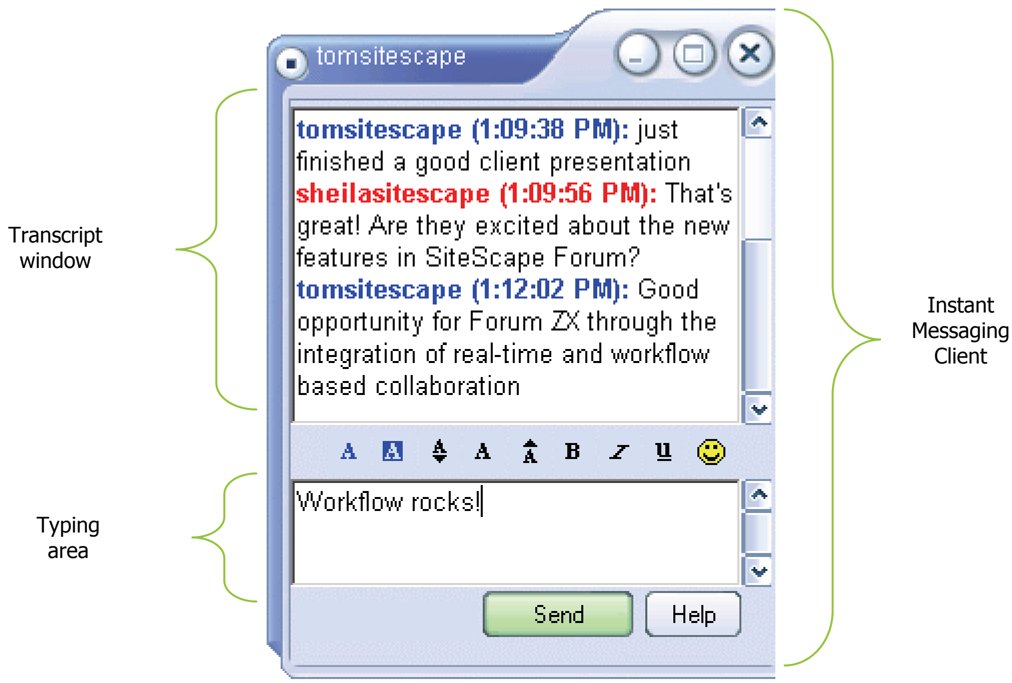
Communication Tools

Forum ZX is integrated with SiteScape Zon to provide different ways to contact and communicate with your Forum teammates. Most of the following communications tools are available through the Zon *client*, an application that you download onto your computer and run independently. After you have configured your online capabilities in your user profile, and have downloaded the Zon client, you can contact your teammates in several ways:

Instant Messages

Instant messaging is available through applications such as Zon and AOL Instant Messenger. Instant messaging allows you to communicate with another person in *real time* (meaning that the communication occurs immediately) using your Internet connection. Although similar to having a phone conversation, instant messages are text-based, so you type your responses to each other. As you enter your text, the screen displays an on-going transcript with the most recent comment on the bottom.

For example, an instant message client, with an ongoing instant message session, may look like this:



Meetings

Meeting, which are available through Zon, allow you to hold an online meeting with other Forum users who are using Zon. There are two different types of meetings. Instant meetings, like instant messages, occur immediately. Scheduled meetings are set for a specific time and date in the future. Both types of meetings consist of a host and attendees.

To initiate a meeting in Forum, you select the participants and then select the type of meeting (instant or scheduled). When you are in a meeting you can upload documents, create interactive whiteboard sessions, and share your desktop to make presentations. Meetings can also be recorded for future reference, and recorded meetings can be added to Forum as discussion entries.

Conference Calls

You can create and schedule conference calls. Conference calls allow you to contact people individually or as a group. You can set up a managed conference call, so when people dial into the call they are informed that they are part of a conference call. Once they have received this information they can join the call. Like meetings, conference calls can be instant or scheduled.

Chat Sessions

Forum also allows you to initiate a chat session with selected individuals. Chat sessions, like instant messages, are real time typed communications with your co-workers. However, chat sessions allow you to communicate with more than one person at a time.

E-mail

You can send e-mails to other Forum users. E-mail is not real time, meaning that your contact with the other people will not happen immediately, and you must have an e-mail application available, such as Microsoft Outlook.

Each of these tools can be used to contact your co-workers.

Presence

To help you use the communication tools, Forum provides a way to identify the status of each of your teammates through user information icons.

If you are using Forum ZX, and your administrator has configured the presence feature, you will see presence information, or online status, for your teammates. *Presence* indicates the online status of the person, and is identified by the user information icon located next to an individual's name.

Each time you log onto Zon, Forum recognizes that you are connected and using Zon and will display your current presence information. For example, when you first arrive in the morning and you have not logged onto Zon, others will see your user information icon is gray, indicating that you are not online yet, or "offline". Once you log into Zon, your user information icon changes to green, showing others that your status is now "online".

You can use your user profile to set how other people see your presence information within Forum.

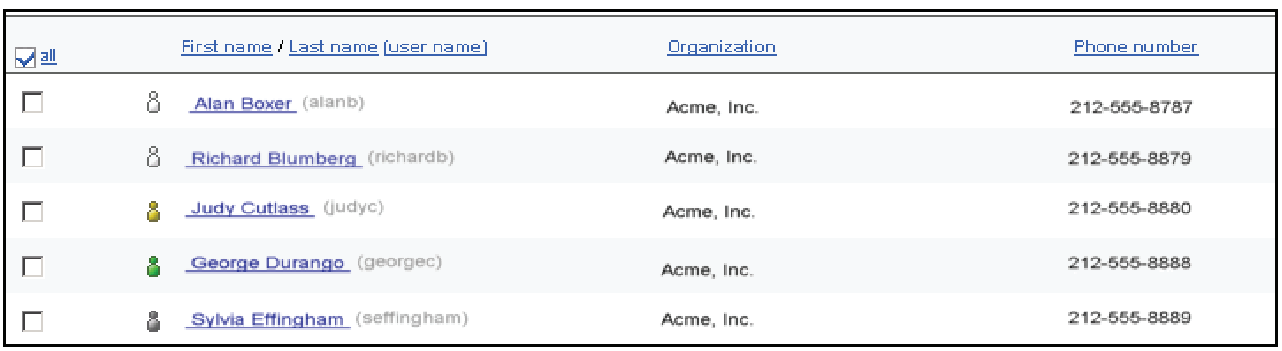
User information icons

Each user information icon displays a different status:

Icon	Description

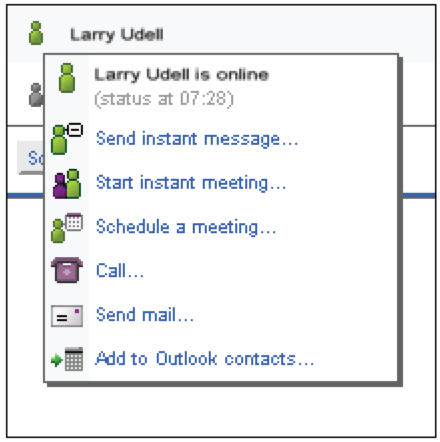
Icon	Description
	A gray icon indicates that you have configured your presence to display online, but you are currently offline.
	A green icon indicates that you have configured your presence to display online, and you are currently online.
	A yellow icon indicates that you have configured your presence to display online, and you are currently online but have stepped away from your computer for a while, for example, for lunch.
	A white icon indicates that you have not configured your presence to display online, and there is no additional information available.

For example, in the search results window below, each person has a user information icon next to his or her name:



Using presence icons to contact people

Presence icons can also be used to contact an individual directly. Clicking on a presence icon displays a pull-down menu similar to the one below, allowing you to use any one of the communication tools:



Forum provides easy ways to work with others in your organization. Using these communication tools, you can chat, call, meet or send messages to your teammates easily from almost any Forum tool.

Chapter 2: Getting Started

This chapter provides instructions for these common tasks:

Task	Description
Register and log in	To become an active participant in discussion forums, you must register with a username and password.
View information in Forum	When you view a workspace, you can see what it contains and decide if you want to view any of its items. In addition you can navigate through the information in Forum by configuring what information you would like to view.
Add a discussion topic	Adding a topic in a discussion forum is one way to begin the collaborative process.
Reply to a topic	You can reply to topics entered by other users. You can attach files to discussion topics, replies, and other types of entries.
Interact with teammates	You can quickly interact with members of your team, through meetings, chat sessions, and calls.

Register and Log In

Registered users can view and participate in Forum. The zone manager may also allow anonymous access, but managers typically allow anonymous users only to read information, not to create new entries.

Even if anonymous access is permitted, SiteScape recommends that you register a username and password when you start using Forum. Some Forum features do not function properly for anonymous users. For example, you need to register a username before Forum can track the entries that you have not yet seen. In addition, if multiple users log in anonymously, Forum may not always display the expected page or settings.

Your company may require you to contact a manager to register, or you may be able to register yourself.

To Register:

1. Enter the URL for accessing SiteScape Forum in the address box of the browser window. (If you do not know this URL, contact your Forum manager.) The login box appears.

2. Click **Register**.

   The registration form appears.

3. Enter your first and last name. Forum will apply your name as the signature to entries that you create.

   In the "Login name" box, enter a name. Your username can contain alphanumeric characters (a-z, A-Z, 0-9), dashes, and underscores, but no spaces. Names cannot include dashes as the first character in the name. An example of an acceptable name is:

   ```
   jean
   ```

   Usernames are case-sensitive. Whenever you log in, you must specify the same upper- and lowercase letters that you specify here. Forum also does not allow duplicate names that differ only by case. For example, if a user "Peter" already exists, you cannot register the name "peter."

4. Enter a password, and then enter it again to verify it. Passwords are also case-sensitive.

5. Enter your e-mail address.

   The e-mail address is optional, but some features do not work without your e-mail address.

   The remaining items are optional. Complete as many of them as you choose.

   The **Show Forum preferences** button allows you to change the way that Forum appears to you. You can set the date and time formats, specify your time zone, choose a color scheme, and more. The **Show additional profile info** button allows you to provide more information about yourself, such as your phone number, a picture, and a personal file such as a resume.

6. Click **OK**.

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

To Log In:

1. Enter the URL for accessing SiteScape Forum in the address box of the browser window. (If you do not know this URL, contact your Forum manager.) The login box appears.

2. Enter your Forum user name.

   This is the name that you entered in the "Login name" box when you registered. Remember that your user name is case sensitive.

3. Enter your Forum password.

4. Click the **Login** button to login.

View Information in Forum

In Forum and WebWorkZone, the top-level workspace is called the *zone workspace*. This is the workspace that is common and accessible to everyone in your organization. If your manager creates additional workspaces, you may be able to access more than one workspace.

After you log in to Forum, the workspace page appears. You can locate the name of the current workspace in two places on the workspace page: in the upper-left corner, and in the Workspaces list, marked by a green arrow.

Navigate the Workspace

When you click the Workspace tab in the top-left section of the page, the current workspace page appears. The hierarchy of workspaces and subordinate workspaces appears in the Workspaces list on the left side of the page. The hierarchy is very similar to that of a standard file-access software program. To view a workspace, click its title.

The right side of the workspace page displays a list of all the forums that you can access in that workspace.

Using "My summary" Page

The "My summary" page provides another way to navigate and keep track of information by displaying a concise summary of activity in the forums that interest you most. "My summary" can display a count of new or modified discussion entries, entries from one or more calendars, tasks assigned to you, and more. This page is especially useful if your zone includes a large number of forums.

Because the "My summary" page is designed to track only the forums that are important to you and your work, you need to set your preferences before you can use the page.

To access the User Preferences page:

1. Click the "My summary" tab.

2. Click **Preferences** in the toolbar.

   The User Preferences form appears, displaying the items that are available for display on the "My summary" page.

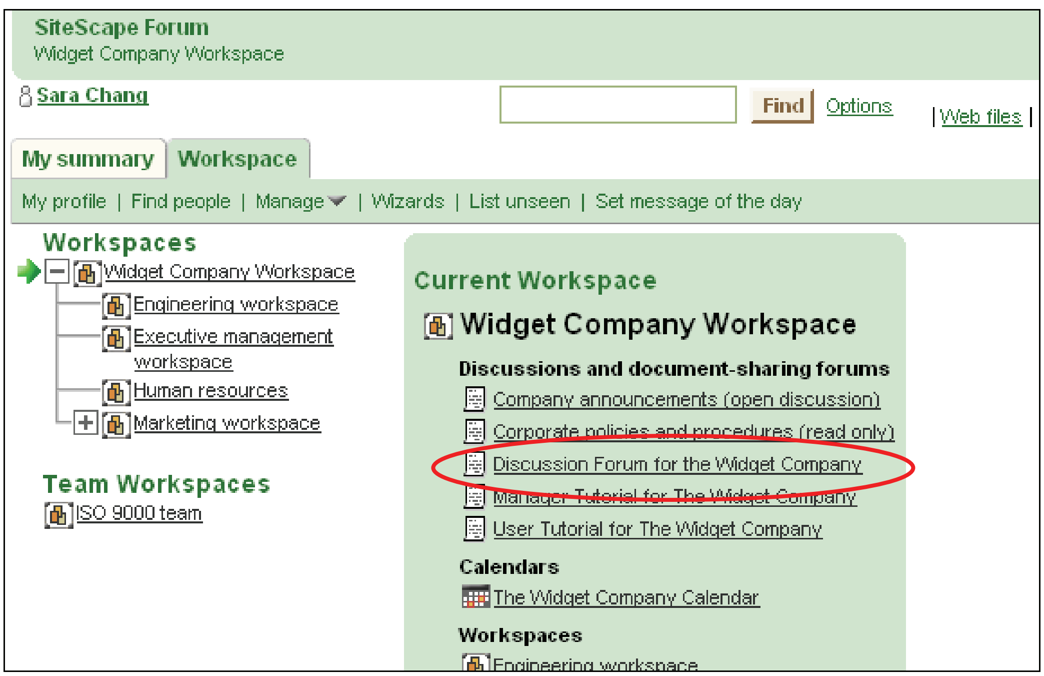
3. The first checkbox sets the "My summary" page as the first page you see every time you log in to Forum. Use the checkboxes to select what appears on your "My summary" page.

4. Click OK.

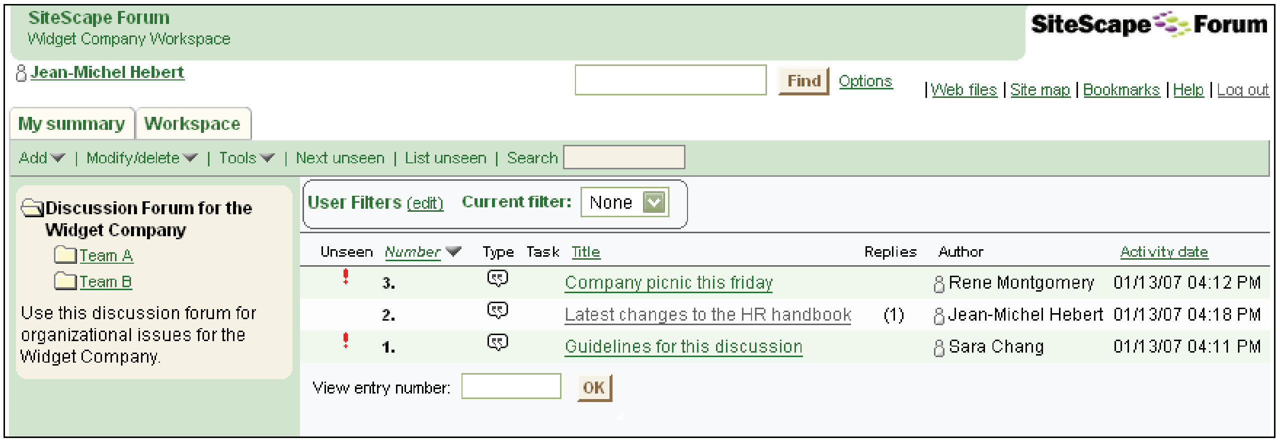
The "My summary" page appears, showing the items you specified. You can change your preferences for the "My summary" page at any time.

View a Discussion Forum

You view a discussion forum by selecting it from the right side of the workspace page. You can also click the Discussions tab (if this optional tab is present), and then click the name of a discussion.



The discussion forum that you chose appears, displaying subfolders on the left and a list of entries (discussion topics, replies, documents, and more) on the right.



Add a Discussion Topic

In the discussion forum, view the list of entries.

1. Click the Add toolbar item on the left side of the toolbar.

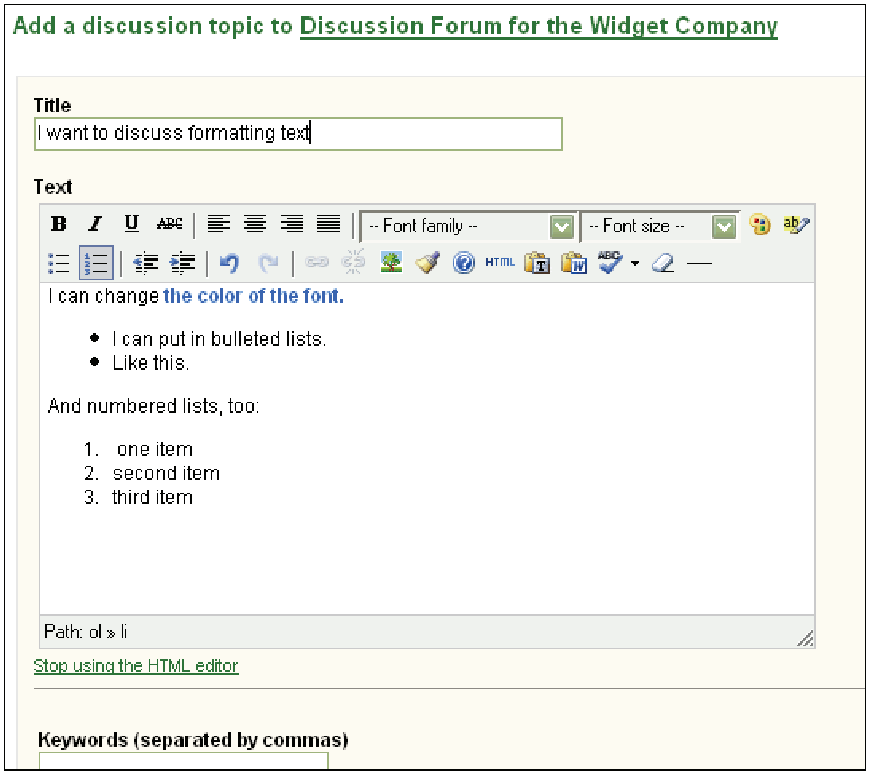
A drop-down menu appears, displaying the possible entry types.

2. Click Add discussion topic.

The “Add a discussion topic” form appears.

3. Complete the form.

You can use the HTML editor to format your text, as shown in the picture on the following page.



The HTML editor does not support scripts.

4. Click **OK**. The entry you created appears.

Reply to a Topic

After reading an entry in a discussion forum, you may want to respond.

To add a reply to a discussion-forum entry:

1. In the discussion forum, click the title of the entry to which you want to respond.

The entry appears.

2. To the far right of the entry title, click the **Reply** button.

The "Add reply to..." form appears. It is similar to the form for adding a topic.

3. In the "Title" text box, specify a descriptive title for the reply.

4. Enter the text of the reply in the "Text" box.

5. If you would like to attach a file or document, you can use the **Browse** button to locate a file on your computer and attach it to your reply.

6. Click **OK**.

   The title that you provided now appears in the list of replies to the discussion topic. If you have attached a file, a link to that file also appears.

Sometimes, you may want to respond to a reply, and not have your response show up at the bottom of the entire list of replies. To do this, view the reply to which you want to respond, then click **Reply** to the far right of its title. After you enter your reply, it appears below the reply you were responding to.

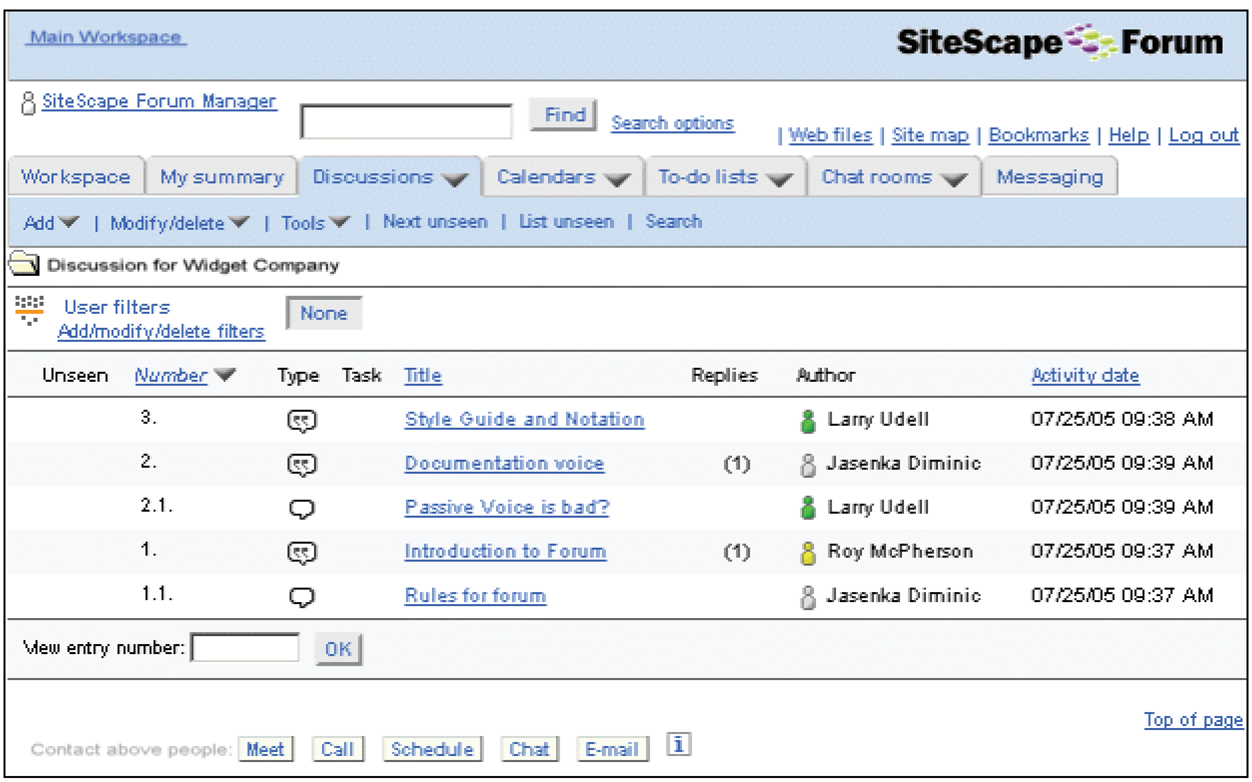
Interact with Teammates

Forum ZX provides many tools that help you interact with others who have contributed to discussion forums or to specific entries.

To interact other discussion participants:

1. Open the discussion forum.

   Discussion forums may have several different contributors, who are identified in the "Author" column.   In the example on the next page, there are three different authors who are listed (Larry Udell, Jasenka Diminic and Roy McPherson).

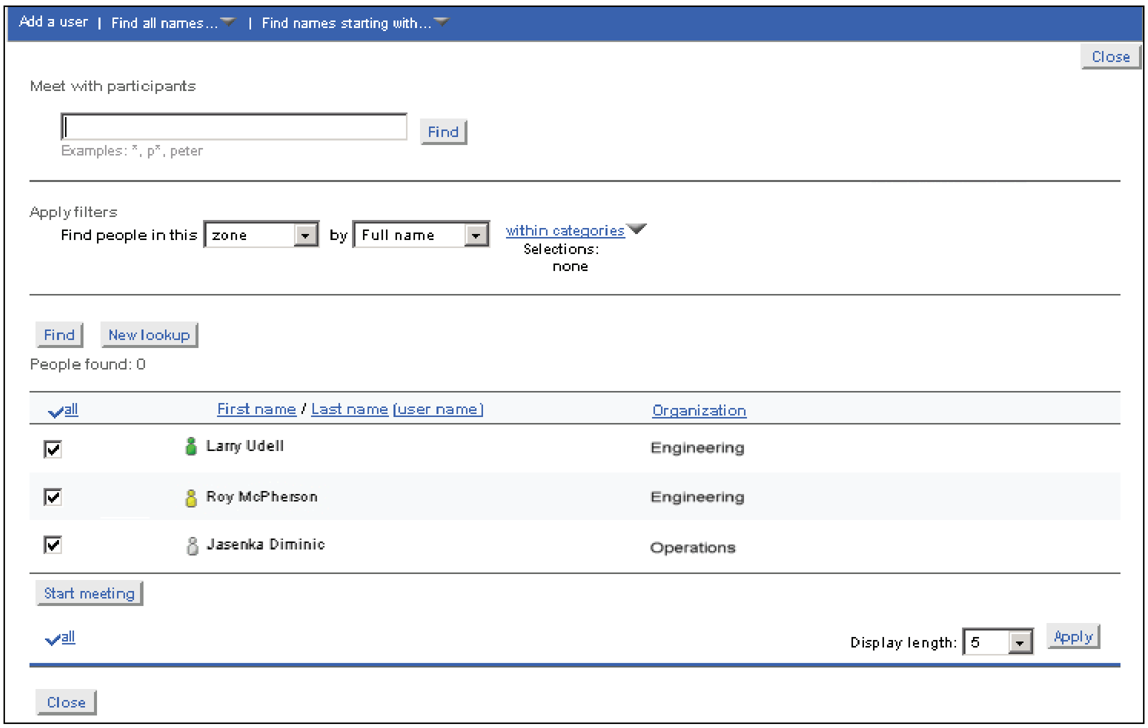


2. Use the **Contact above people** buttons to select a method of contact with the people listed on your screen. In this example, you can contact Larry Udell, Jasenka Diminic and Roy McPherson.

3. The "Contact participant" screen appears.

   The list of people you can contact, based upon those listed under the Author column of the discussion list, is displayed. Use the check boxes to select the individual you would like to contact, or click the **All** button to select everyone.

   Continuing with the example above, clicking the **Meet** button would return the following:



4. Click the **Start meeting, Call, Start chat, Compose email,** or **Schedule meeting** button to initiate start a meeting, call, chat, send an e-mail or schedule a meeting with the selected users.

Chapter 3: Learning Common User Tasks

This chapter provides instructions for these additional common tasks:

Task	**Description**
Search	You may want to locate people, discussion topics, replies, or documents that contain a specific words or phrase.
Find teammates	Find other forum members, users or team members and communicate with them.
Delete a topic	You may change your mind after creating a topic, or you may want to delete an older entry.
Receive e-mail notification	You can obtain e-mail notification whenever changes are made to a specific discussion forum.
View new or modified entries	Discussion forums provide icons and toolbar items to allow you to view *unseen* (new or modified) entries. You can view them one at a time, or you can view a list of unseen entries.
Viewing and changing your registration information	You may need to update your personal information, or you may want to change the color scheme that you see in Forum.
Assign tasks	The Tasks page allows you to assign tasks and set reminders to help you and others keep track of work.

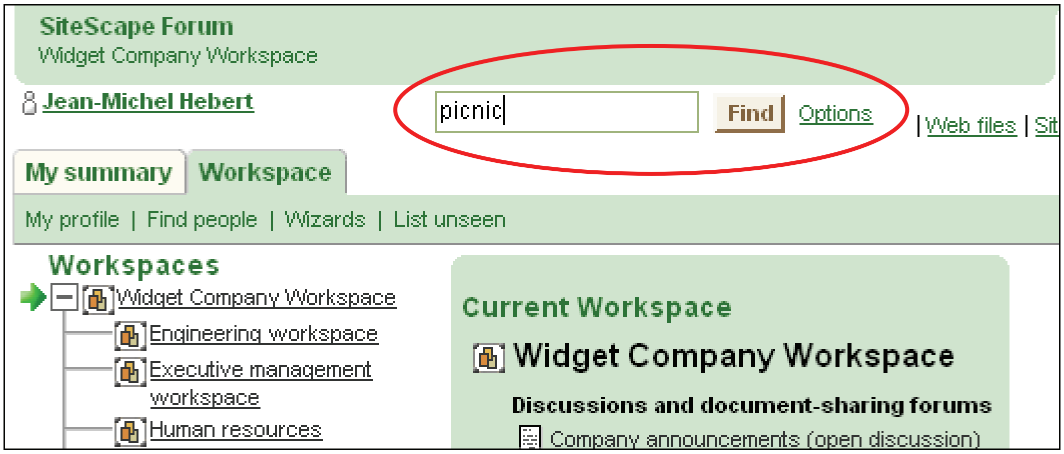
Search

You can use the search feature to find discussion topics, replies, or documents that contain a specific word or words. You can search across all forums or in a single forum.

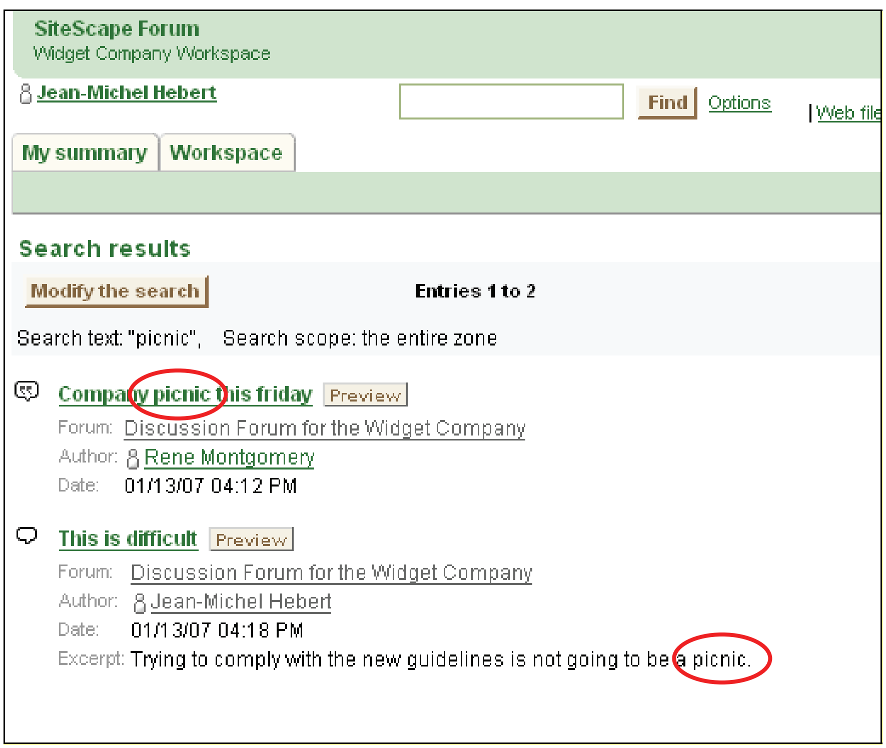
Search All Forums

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

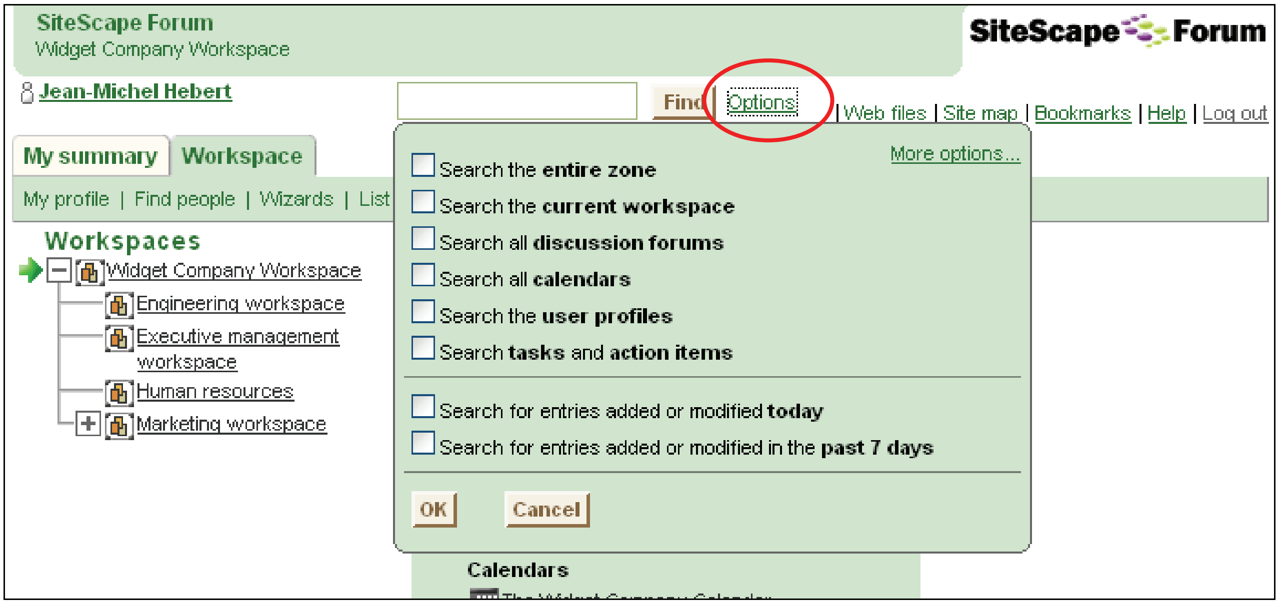
1. Enter the text for which you would like to search in the **Find** field.



The result of your search appears.



2. You can create a more refined search by selecting the **Search options** link. Once you select the link, the search options form appears.



3. You can select specific areas within Forum to search. If you would like to enter more options, select the **More options** link to display the Advanced Search screen.

   If you are new to searches, begin by typing words you are looking for, such as:

   ```
   apple orange fruit juice
   ```

   To search for an exact phrase, enclose the phrase in quotation marks:

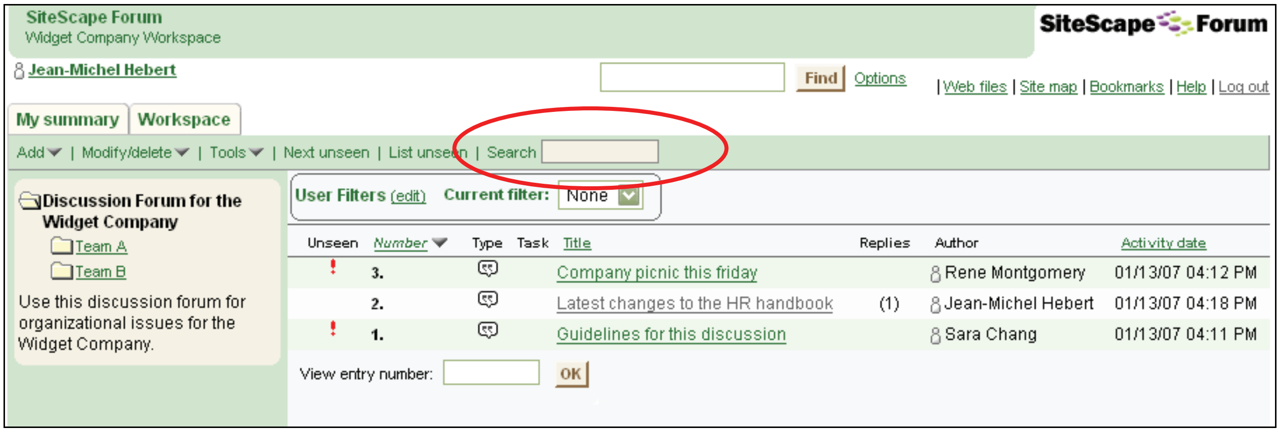
   ```
   "orange juice"
   ```

4. Once you have entered the text for which you would like to search, click **OK**.

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

Search a Single Forum

To limit the search to a single discussion forum, view the forum and click **Search** in the toolbar.



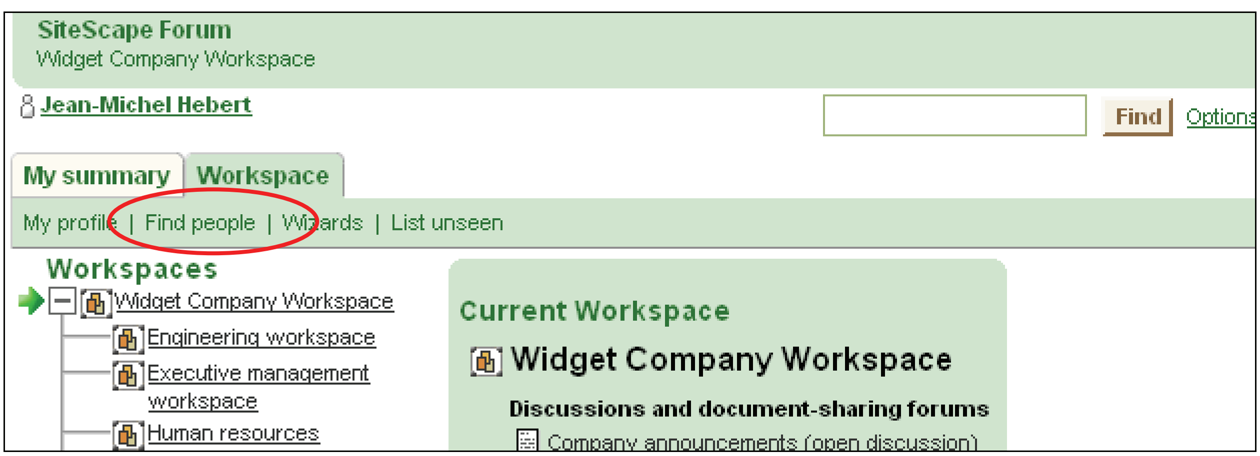
Enter the text that you would like to find. Forum searches only the current discussion.

Find Teammates

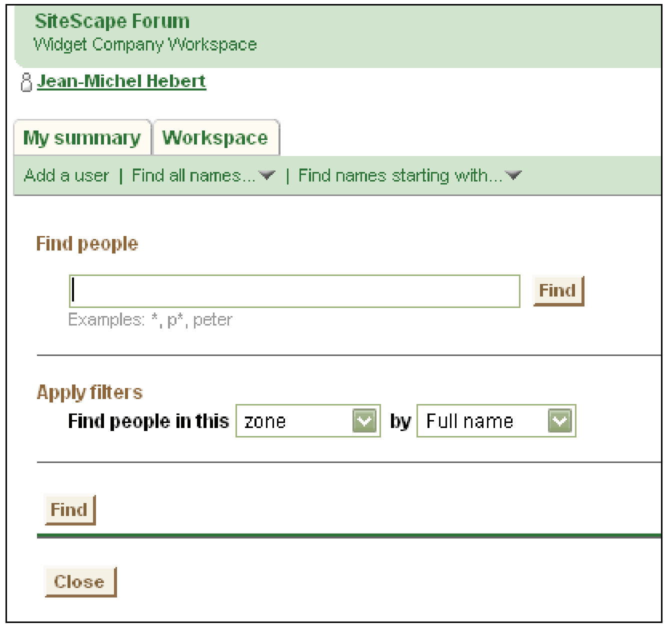
You can look for other Forum groups or individual team members.

To find people:

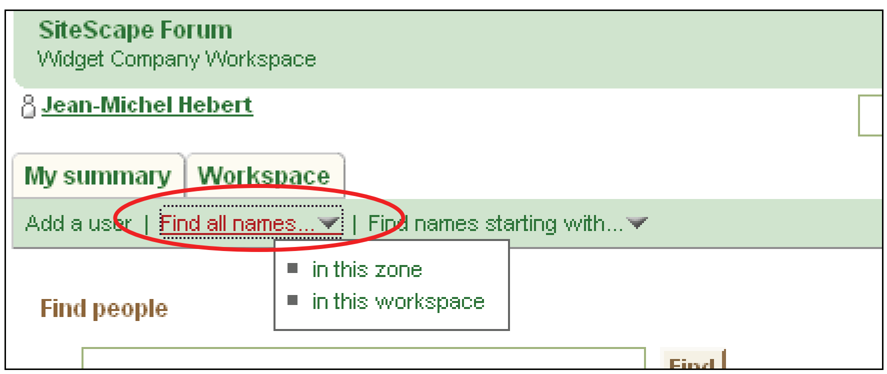
1. Select the **Find people** link on the toolbar of the workspace or "My summary" page.



The Find people screen appears. Use this screen to enter a person's name in the "Find people" field.

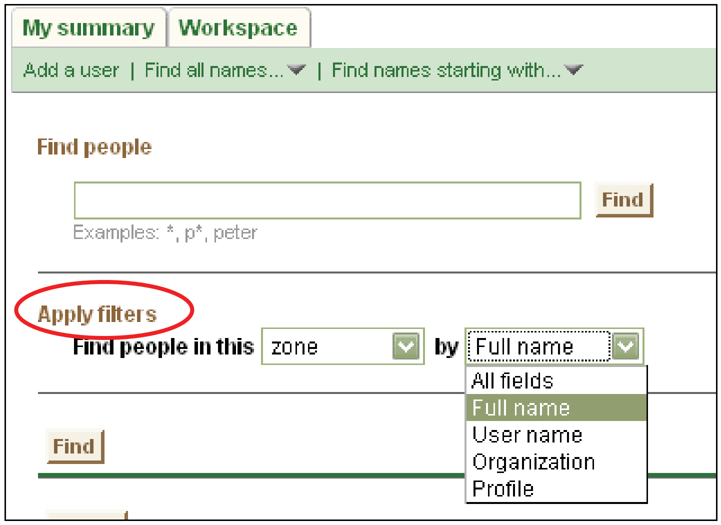


2. Use the **Find all names** pull down menu to focus your search for people within the entire zone or the current workspace.



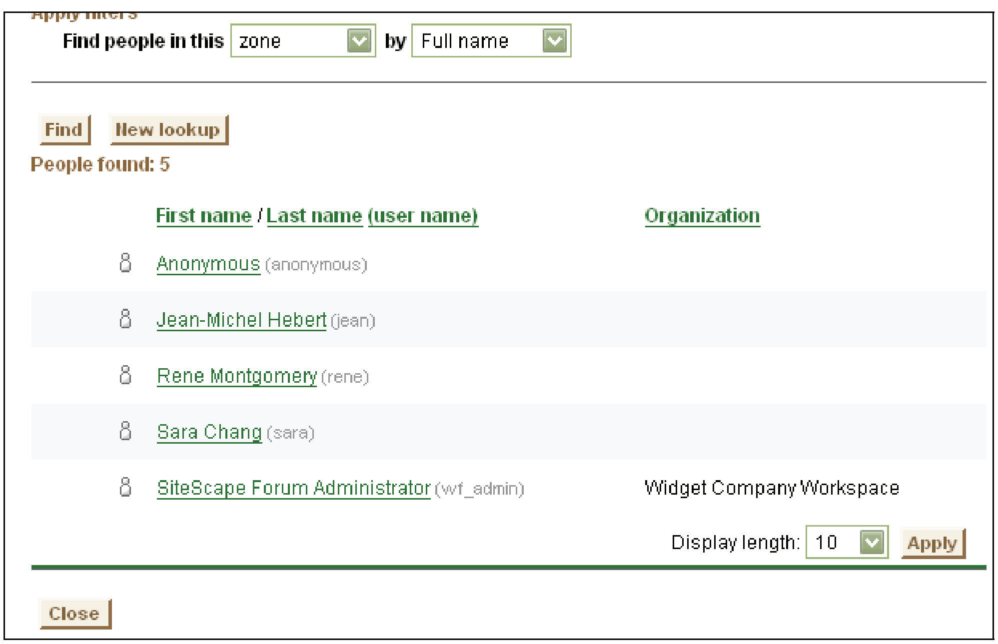
3. Search for names that start with specific characters by selecting the **Find names starting with...** link. The pull down menu will allow you to select an alphanumeric character that will limit your search.

4. Filters can be used to search for specific types of information. Use the pull down menu to confine the search within the zone or the current workspace, or to search for people based upon their full name, organization, user name, or profile.



5. If your administrator has created them, your profile information will contain categories that allow you to identify information about yourself, such as your department, or your title, etc. If profile categories are available, you can search for them by using the **Within categories** link. A list of the available categories will appear in the pull down menu. Select the category information to filter the search.

6. Click the **Find** button once you have entered all of your search parameters. The users will be listed based upon your criteria.

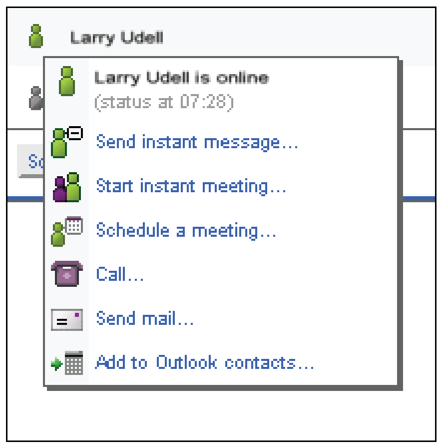


To contact a person individually:

1. Click on the individual's presence icon.

   A pop up menu will appear, displaying the status of the individual, as well as menu options.

   The options that are available in the menu are determined by the status of the presence icon. If the individual's presence icon is white, or no presence information is available, then you are only able to view their user profile, or to add their contact information to your Outlook contact list. However, if they are offline, away, or online, you have additional options.



2. Select one of the menu options.

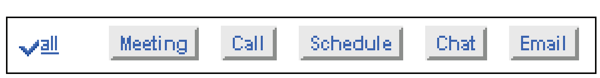
   Once you have selected a method of contact, you are presented with a notification that another application will be launched.

To contact multiple people:

1. Choose the people that you would like to contact by selecting the check box next to their name. To select everyone in the list, click **All**.

2. Use the buttons located on the bottom of the form to send a message, start a meeting or a chat session, or send an email. Depending on the configuration of your zone, and the applications that your administrator has made available, you may see all or some of these buttons.

3. When you select one of the buttons, as displayed below, you are taken to a separate application. A window appears indicating that you are launching a new application.



Delete a Topic

You can delete only those topics or entries that you created (or you must have management privileges to delete entries).

To delete a discussion topic:

1. View the discussion entry.
2. Click the **Modify/delete** toolbar item to access the Modify/delete menu.
3. Choose **Delete** from the menu.

   The "Delete items from..." page appears, displaying a list the entries that you can delete.
4. Click the title of the discussion topic you want to delete.

   You can select multiple items by Ctrl+clicking the titles of the entries you want to delete.
5. Click **OK**.

   A confirmation form appears, explaining that this action cannot be reversed.
6. Click **OK** on the confirmation form.

   The topic you selected has been deleted.

Receive E-Mail Notification

Forum can send you e-mail notification when additions or changes occur in a discussion forum. To receive e-mail notification updates, your registration information *must* include your e-mail address and forum's manager must specify either your username or your group in the forum's distribution list. Otherwise, you will not receive e-mail notifications from that forum.

You can change the default settings and receive e-mail notifications for a discussion by doing the following:

1. From the discussion forum, click on the **Tools** toolbar item.
2. Choose **Set Notification** from the menu.

   Forum displays the "Notification for..." page.
3. Click on one of the **Enable e-mail notification** checkboxes:

   - Use Forum Default E-mail Notification - The Forum default requires your manager to add your name, or the name of a group to which you belong, to the discussion distribution list before you can receive e-mail notifications about activity in this discussion forum.

- Disable E-Mail Notification - If you disable e-mail notification for this discussion, this setting overrides settings made by the discussion-forum manager. So, if your name is on the discussion distribution list, but you check this box, you do not receive e-mail notifications.
- Enable E-Mail Notification (Digest Style) - This option allows you to receive a summary e-mail message 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, is the default for e-mail notification.

- Enable E-Mail Notification (Individual Message Style) - According to a schedule set by your discussion-forum manager, you receive an e-mail message for every new or modified entry. The e-mail message also includes any files attached to the entry. This setting overrides settings made by the discussion-forum manager.

4. Click **OK**.

E-mails contain links to one or more new or modified entries. When you click the link in the e-mail message, it displays the Forum entry in a browser window.

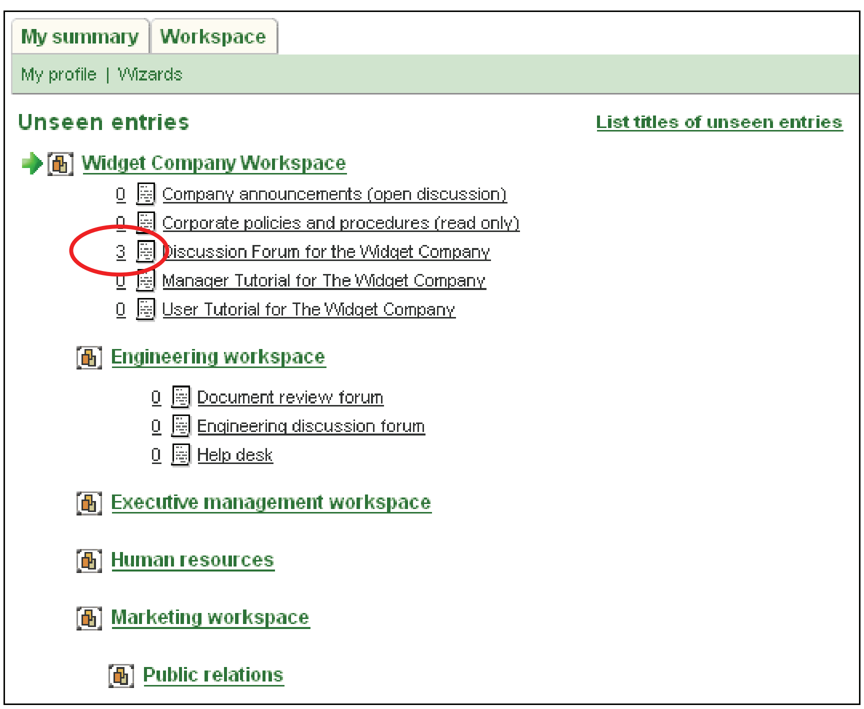
View New or Modified Entries

Forum can display entries or replies that you have not yet seen (*unseen* entries). To view these unseen entries, use the **Next unseen** and **List unseen** toolbar items. In a discussion forum, **Next unseen** allows you to view individual unseen entries one at a time. **List unseen** allows you to track information in a single discussion forum, in all of the discussion forums you have access to in a workspace, or in all the discussion forums you have access to in a zone. When you use **List unseen** in a single discussion forum, you see a list of new or modified entries in that forum. When you use **List unseen** from the Workspace or "My summary" page, you see a count of new or modified entries in all of the available discussion forums.

To List Unseen Entries:

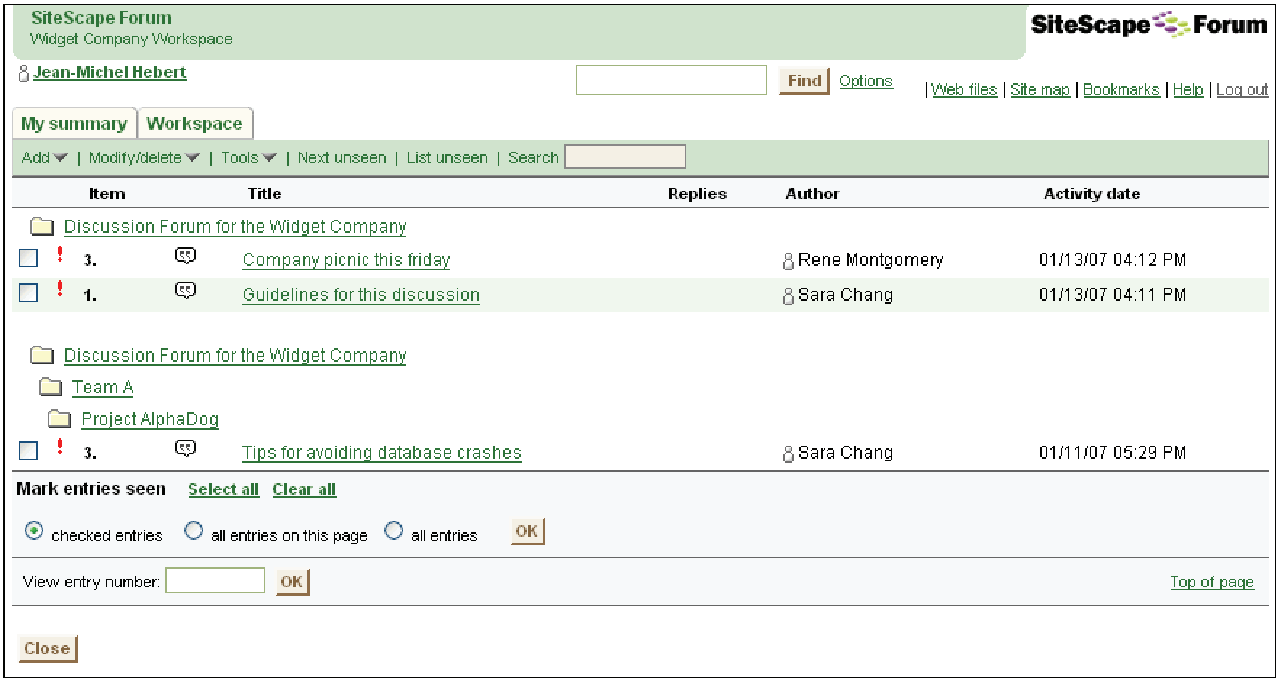
1. From the workspace page, click the **List unseen** toolbar item.

A summary of activity in all of the discussion forums you have access to in that workspace appears.



2. Review the count of new or modified entries in each of the discussion forums, and choose one to view

To see a list of the new or modified entries in a discussion forum, click the number to the left of the forum title. A list of that forum's unseen entries appears.



Click the title of an entry you want to see. Use **List unseen** in the toolbar to return to the list.

View Unseen Entries from the Summary List

You can also view unseen entries one at a time. Select the title of a discussion forum and open the forum.

Perform one of the following:

- Scan the left side of the list of entries for red exclamation-point icons. Click the title of an unseen entry that interests you. (After you view an entry or mark it as "seen," the unseen icon disappears.)
- Click the **Next unseen** toolbar item. You can click this toolbar item to view the unseen entries one by one, from the oldest to the most recently created or modified.

Mark All Entries as Seen

If you have more unseen entries than you want to view, you can mark all entries created before a specified date as "seen".

1. Enter the forum.

2. Select the Set seen entries option from the Tools menu.

3. On the "Mark entries..." page, mark all entries created before a specified date as "seen."

   You can also choose to mark all of the entries.

4. Click **OK**.

   The entries are now considered "seen." From now on, Forum marks as unseen only those entries that are created or modified after the date you specified.

View and Change your Registration Information

Forum allows you to provide information about yourself to other members of the Forum community. This information is stored in your user *profile*. Your user profile information is available to others as a *business card* when they click the link next to your name, or perform a search. The business card provides a summary of your contact information and additional information that you wish to share with others.

An administrator must configure some of the additional information fields that are used by the business card.

To keep your user profile information current:

1. On the workspace page, click the **User profile** toolbar item.

   The top of the page presents a summary of all of your contact information.

2. Click the **Modify profile** toolbar item.

   The "Modify user profile" form appears. There are a number of drop-down sections in this form. To display the information presented within a section, click the section arrow to expand the section, or click the **Expand all** link.

3. Make changes to your user profile:

   - Your basic profile information contains the information that you entered when you created your Forum registration, including your name and password.
   - Change your Contact Information, such as your e-mail address or phone number. You may also provide Zon, AOL or Yahoo Instant Messenger Screen names, and set others' ability to see your presence information.
   - Upload Additional information, such as a picture or a personal file, add an introduction, or create or delete your personal calendar.
   - Use the Date and Time Preferences section to set your preferences for the time zone, date and time formats.
   - Set your Forum User Interface Preferences, including colors, fonts, and language.

- Configure your Forum Notifications, enabling e-mail notification from specified forums.
- Set up your Forum Preferences, which include your preferred workspace and group membership.
- Configure your **NT Settings**, if applicable, which allow you to identify your NT logon information.

4. Once you have made your changes, click **OK.**

Your user profile is modified and you are returned to the business card screen.

5. If you are using Forum ZX, once you have entered your Zon account information, click the **Download Zon** toolbar item to begin downloading the Zon client.

Assign Tasks

The Tasks feature helps you keep track of your work using two types of entries:

- Tasks - Tasks are activities that are assigned to users. Forum indicates when the task is started, almost due, completed, or overdue. Optionally, assigned users can receive e-mail to inform them of the creation and due date of the task.
- Reminders - Reminders provide documentation of events that users must remember. Forum sends e-mail notifications on or before the date of the event. You can remind yourself or others of deadlines, errands, meetings, and more.

Add a Task or Reminder

To add a task or reminder to the To-Do page:

1. Click the To-Do tab.

2. From the **Add** drop-down menu, select **Reminder** or **Task**.

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

3. Complete the form by entering a title and description, a date or dates, usernames of people who will be assigned the task or sent the reminder, a priority level, and so on.

When assigning a task, you can choose to have Forum e-mail the assignees to notify them of their task.

4. Click **OK**.

The new task or reminder appears on the Tasks page. From this page, you can view, modify, and delete entries. If you are an assignee, you can view an entry to specify that you have completed the task.

Attach a Task or Reminder to a Discussion-Forum Entry

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

To attach a task or reminder to a discussion-forum entry:

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

The entry page appears.

2. From the **Attach** menu, select **Reminder** or **Task**.

The "Add a reminder" or "Add a task" 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 - Anyone who has the right to view the discussion forum can see the task.

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

4. Click **OK**.

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

Chapter 4: Working with Calendars

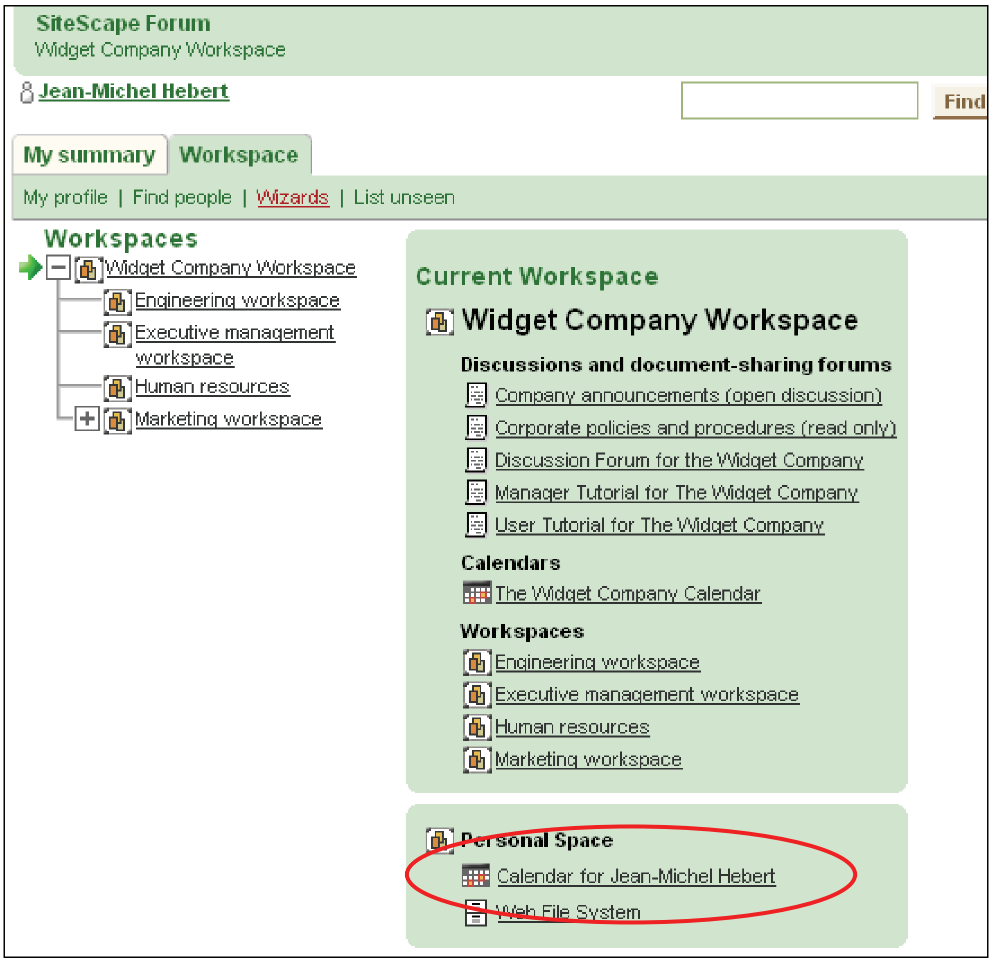
This chapter provides information about using Forum calendars and sharing appointments with Microsoft Outlook. It includes the following information:

Task	**Description**
View your personal calendar	Describes how to view your personal calendar.
View appointments for a specific day	Describes how to review appointments either for the current day or another day.
Schedule an appointment	Describes how to place an appointment into a calendar.
Schedule a repeating appointment	Describes how to create a standing appointment that recurs in a given pattern (weekly, monthly, the first day of the third week, and so on).
Merge calendars	Describes how to create a calendar view that shows appointments from more than one calendar.
Import entries from Microsoft Outlook	Describes how to bring an appointment from Outlook into a Forum calendar.
Export entries to Microsoft Outlook	Describes how to bring an appointment from a Forum calendar into an Outlook calendar.

View Your Personal Calendar

If your zone manager allows it, each user can have a personal calendar. When you register or modify your profile, you create a personal calendar by clicking a checkbox at the bottom of the "Forum preferences: preferred workspace, personal forums" section of the form.

A link to your personal calendar appears in the Personal Space section in the bottom-right corner of the workspace page:



Other users can choose to view your personal calendar by clicking **Users' calendars** on the toolbar.

View Appointments for a Specific Day

1. Navigate to the calendar.
2. If you see a view of the week, month, or year, click **Today**.

   Appointments for the current day appear. You can now specify that you want to view the appointments for a different day.

3. In the lower-right corner of the page, enter the day, month, and year.

4. Click **Go**.

   The appointments for the day you specified appear.

Schedule an Appointment

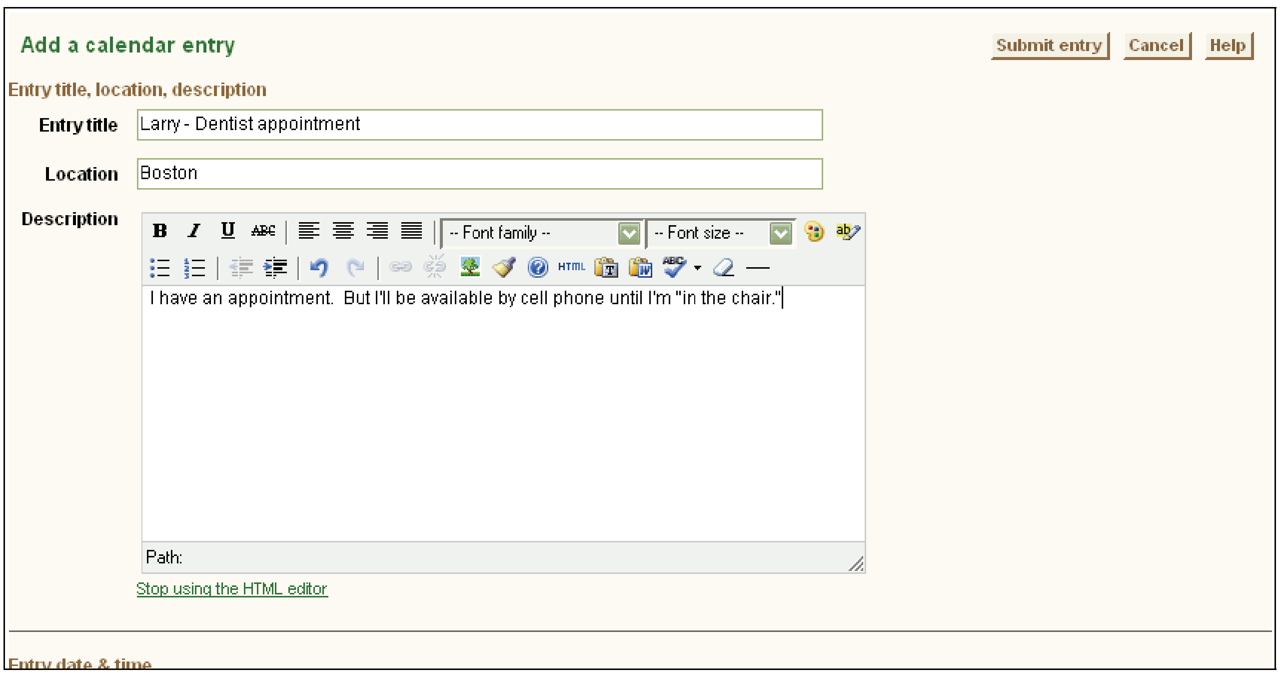
To schedule an appointment, you must be the owner of the calendar owner or you must have permission to add calendar entries.

To schedule an appointment:

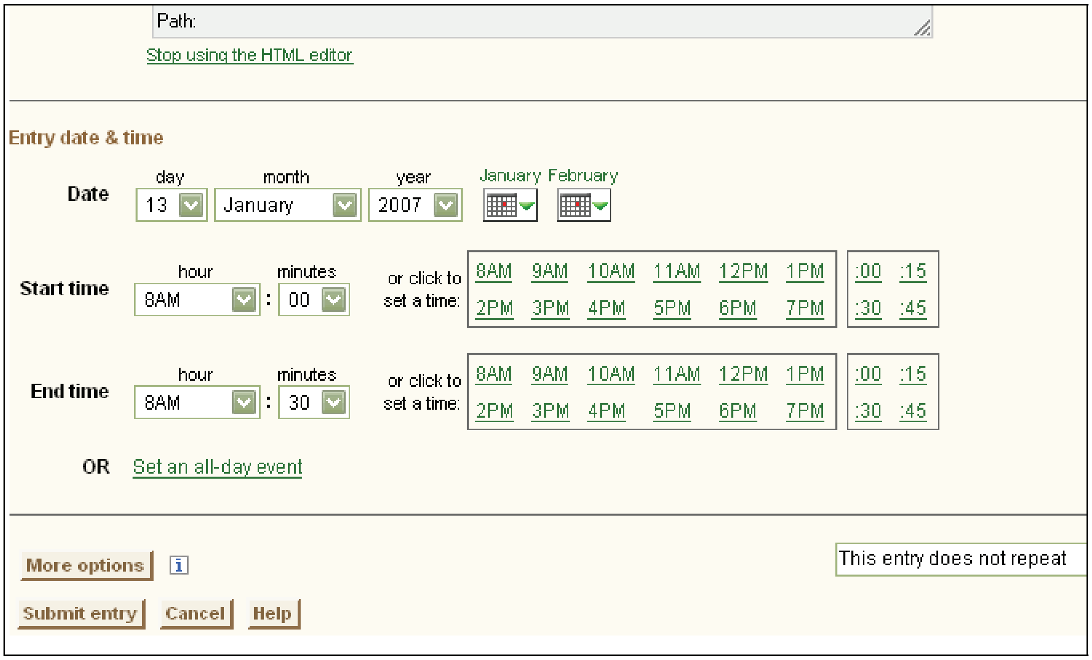
1. Navigate to the calendar.

2. Click the **Add entry** toolbar item.

   The “Add a calendar entry” form appears, whose top portion looks like this:



The bottom portion of the form appears as follows:



3. Enter a title for the appointment.

The location and description are optional.

4. Specify a date for the appointment. (The default entry date is the day you were viewing in the calendar.)

5. Specify a start time and an end time for the appointment.

To enter a time, you can use the drop-down select boxes or the links to the right of the menus. If the entry does not start at the beginning of the hour, use the links at the far right, which provide fifteen-minute increments. For an all-day event, click the **Set an all-day event** link. "All day" then appears in both the Start Time and End Time menus.

The remaining information on the form is optional.

6. Click **Submit Entry**.

The appointment is now scheduled.

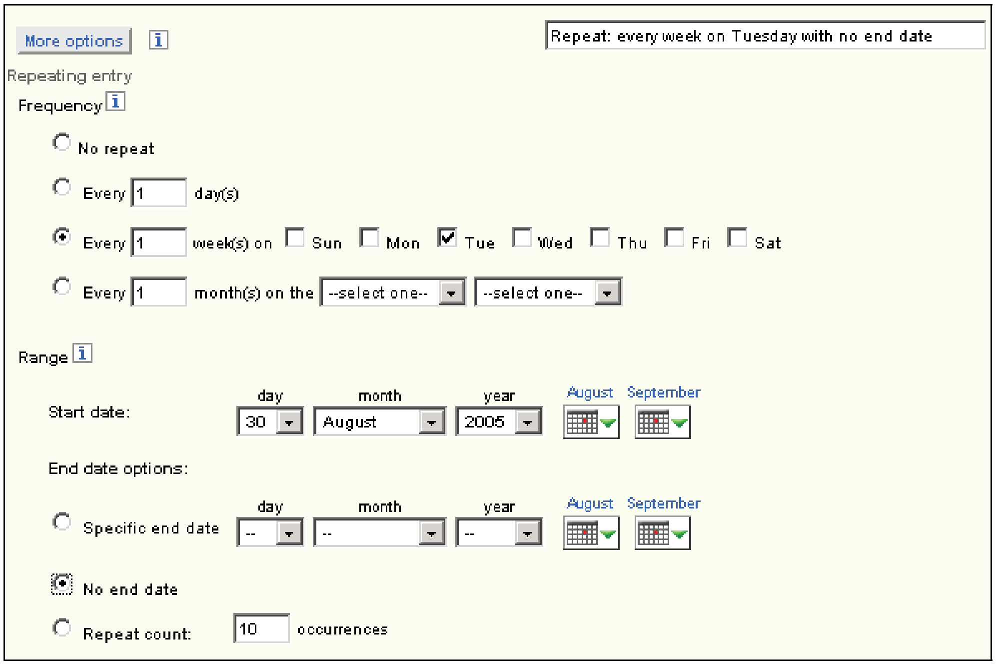
Schedule a Repeating Appointment

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:

1. Once you have created a calendar entry, click 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 repeat.

2. 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 week on Wednesday and Friday, every month on the second Tuesday, and so on).

3. If you have not entered a date range already, specify the Start date of the entry.

4. Select one of the End date options:

- Specific end date - Use this option to specify the exact date on which the entry ends.
- No end date - Use this option if the entry you want the entry to recur indefinitely.
- Repeat count - Use this option to specify the exact number of times you want the entry to recur.

Initially, the calendar contains 10 occurrences of a repeating entry. You can specify a different number.

5. Optionally, choose one or more of the items in the Attachments section.

6. Click **Submit entry**.

   The Calendar page reappears, displaying the new entry. To see the details, click the entry title.

Merge Calendars

It is common to use more than one calendar. As an option, you can set up one calendar to display entries from all of the calendars to which you have access. For example, your view of the corporate calendar (Widget Company Corporate Calendar) can include entries from other calendars (Engineering Department Calendar, Marketing Department Calendar, and so on). Or, you can merge the corporate calendar with your personal calendar so that you (and only you) can view entries from both at the same time. This section describes the second example.

To merge a workspace calendar with your personal calendar:

1. In the Calendars drop-down menu, click the **Calendar for [your name]** link to access your personal calendar.

   > ***Note:*** *To make sure that you are viewing your personal calendar and not the workspace calendar, check that the title of the calendar includes your name (for example, "Calendar for Sara Chang"). Otherwise, your personal appointments could appear in the workspace calendar.*

2. Click the **Tools** toolbar item.

3. Select the **Merge calendars** menu item.

   The Merge Other Calendars form appears, displaying a list of all of the calendars that you are allowed to view.

4. In the select box, Ctrl+click the names of all of the calendars you want to merge with 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 **OK**.

   The specified calendars have been merged.

The **Hide/Show merged entries** link in the lower-left corner of the Calendars page lets you choose which entries appear on your calendar. Initially, entries from all of the merged calendars appear. To return to viewing view only entries specific to your calendar, click **Hide merged entries**.

To remove a merged calendar's entries in a more permanent manner, return to the Merge Other Calendars form as above, and deselect the calendar that contains entries you want to remove from your personal calendar. On Windows, Ctrl+click calendar titles to deselect multiple calendars; if you are using another system use the method that works for your system.

Import Entries from Microsoft Outlook

You can import an appointment from a Microsoft Outlook 2000 calendar to a Forum calendar. To do this, you first obtain the e-mail alias, and then import the entry. The alias is the e-mail address associated with the current Forum calendar. You need to provide this address so that Outlook can reach the Forum calendar.

Note: *Forum supports importing and exporting with Outlook 2000 only. Importing and exporting may not work with previous versions of the Outlook product.*

To obtain the e-mail alias:

1. View the Forum calendar.
2. Click the **Add contact card** toolbar item.

   If this item is missing, your calendar manager needs to configure the alias for this calendar. The Contact window appears. The alias appears in the E-mail field.
3. Make a note of the alias so that you can use it later.
4. Click the “Send using plain text” checkbox.
5. Click **Save** and **Close**.

   You can now e-mail entries from the Outlook 2000 calendar directly to the Forum calendar.

To import an appointment from Outlook:

1. View the Outlook calendar that contains the appointment you want to add to Forum.
2. Double-click the appointment.

   If the appointment is a recurring one, the “Open Recurring Item” box appears. Select “Open the series,” and click **OK**.

   The Appointment window appears.
3. From the **Actions** drop-down menu, select **Forward as iCalendar**.

   An e-mail message window appears. The message contains the Outlook calendar appointment as an attachment.

4. In the “To...” text box, enter the Forum calendar e-mail alias that you obtained in the previous section.

   Do not enter text in the body of the e-mail message.

5. Click **Send**.

   Note: *If you receive a Plain Text Recipient Warning alert, click **Send Plain Text**.*

The appointment is now sent to the Forum calendar. It may take a few minutes to arrive.

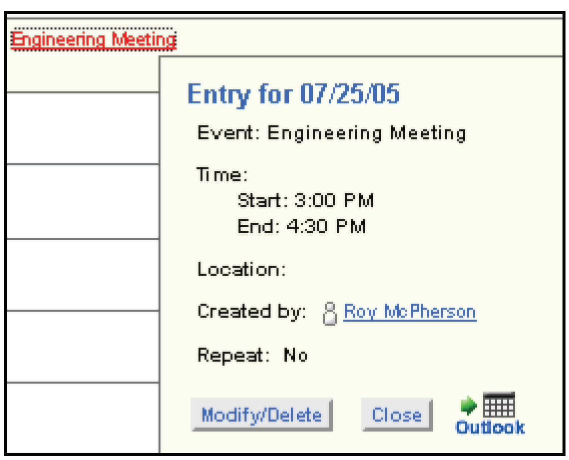
Export Entries to Microsoft Outlook

To export an appointment from a Forum calendar to a Microsoft Outlook 2000 calendar:

1. View the calendar that contains the appointment you want to add to Outlook.
2. Ensure that you can export to Outlook by doing the following:
   - Click the Tools toolbar item.
   - Toward the bottom of the menu, look for Enable adding to Outlook.
   - If the item appears on the menu, click it.

   When the item reads **Disable adding to Outlook**, this feature is enabled.
3. Click the title of the appointment you want to add.

   The entry appears in a popup window.



4. In the popup window, click the Outlook icon.
5. If the option to "Open it with the default application" appears, choose this option.

Forum opens Microsoft Outlook and displays the new appointment.

6. In the Outlook appointment window, click **Save and Close**.

   The appointment is now in the Outlook calendar.

Appendix A: Glossary

blog forum

A specialized forum that restricts participants to the entering, commenting on, and rating of journal entries.

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

Each Forum user has information that they enter into their user profile. The information in the user profile is listed in a business care, with a summary of the information presented on the top of the business card. This information provides both the contact information and additional information that has been configured by an administrator.

chat

A communication usually between more than two people using a real-time-communications client such as Zon. Chat sessions are designed to be quick and brief communication, often informal.

editing applet

A discussion-forum tool that allows you and your teammates to edit uploaded documents. The applet automatically "locks" the Forum entry, opens the file on your computer for you to edit, prompts you to save your changes, uploads your revised version, and unlocks the Forum entry. (The applet requires a Java Plug-in.)

entries

Units of information contained in a forum. Examples include discussion topics, replies, document entries, and calendar appointments.

entry owner

The person who is assigned ownership of an entry (initially, the entry creator).

forum

A virtual meeting place in which you communicate and collaborate with your teammates. Examples of forums include discussions, tasks, and calendars.

forum manager

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.

forum template

A discussion forum that has been made available to a workspace package for use in creating templated workspaces.

group

A list of users that have been organized in a specific fashion. For example, groups can be created based upon company departments (i.e., management, engineering) or across projects (for example, infrastructure, technologyproject). Groups also provide a method of controlling access to forums.

instant message (IM)

A communication between two people using a real-time-communications client such as Zon. Instant messages are designed to be quick and brief communication, often informal.

instant meeting

A Zon meeting that happens without prior scheduling.

personal space

Pages that contain information for your personal use, such as your personal calendar. You access your personal pages from the workspace page.

presence

Presence information is available only to users of SiteScape Forum with advanced presence capabilities. Presence is the term used in Forum to indicate the online and availability status of others. Presence indicates if the person is online, away, or off line.

reminder

A type of entry in the Tasks forum that documents an appointment or event that you want to remember. Forum can send e-mail reminder messages on or before the date of the event.

scheduled meeting

A Zon meeting that is scheduled ahead of time.

search

A tool that allows you to search for an entry that contains specific text 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.

task

A type of entry in the To-do list that documents an activity assigned to a user. Forum records when the task is started, almost due, completed, or overdue. Forum can also send e-mail to assigned users to inform them about the creation or the due date of the task.

unseen entries

Entries that you have not yet read. These could be new entries or modified entries.

user information icons

Presence information is available only to users of Forum with advanced presence capabilities. Presence icons display the presence status of individuals. You can use these icons to send instant messages, start instant or scheduled meetings or send email.

user profile

Your user profile is a place for you to enter not only your contact information, which is available to other users, but to set personal preferences for using Forum.

Web File System

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.

wiki

A set of coauthored and inter-related pages that are developed using a "free content" approach. This approach allows all participants to co-author entries and more. Using Forum, a wiki is a wiki forum.

wiki forum

A specialized discussion forum that restricts users to the creation of wiki pages, modification of those pages, reviewing revisions of those pages, and commenting on the entries. Wiki forums enable a "free content" approach to coauthoring a potentially large set of interrelated documents and provide easy ways for wiki pages to reference one another.

wiki page

An entry in a wiki forum.

workflow

A customization that enables 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.

workspace

A collection of summary pages and forums that one group uses to work toward a common goal. One person can be a member of more than one workspace. In this case, links to additional workspaces appear on the workspace page.

workspace manager

A person who can perform initial configuration of the workspace by creating discussions, and calendars, 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.

workspace package

A collection of forums (which possibly can contain entries, custom commands, and workflow processes) that can be applied as a template for the creation of a new workspace.

zone

All of the workspaces available to your organization and all of the registered users who can access one or more of those workspaces.

zone manager

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

In WebWorkZone, the person who signs up for a zone, performs the initial configuration, invites users to participate, and has the right to perform management tasks in all workspaces and forums.