



SiteScape Forum

Getting the Most Out of Forum

This manual assists you in setting up Forum, populating it, and working with other administrators to ensure your users maximum participation and enjoyment.

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Introduction

Most administrators and managers who champion the use of Forum as a collaboration tool find that it takes more than installing and completing an initial configuration of the product. This manual provides information about how you can increase the likelihood that people will use Forum and find it relevant to their daily work.

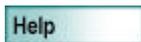
What is in this Manual?

This manual presents the following information:

- Common ways in which customers use Forum to improve collaboration on their web sites.
- Descriptions of common technical and organizational problems that interfere with the use of Forum for effective collaboration.
- Ways in which you can overcome these roadblocks.
- Help in knowing which administrative functions you can use in Forum to implement some of the solutions proposed in the previous section.
- Next steps.

Where can I get More Information?

For more information about performing administrative and customization tasks, see the Forum's Help system. To access the Help system, the Forum summit page, and, in the toolbar located toward the top of the page, click on the Help button, as follows:



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

- | | |
|-----------------------|---|
| Support: | http://support.sitescape.com/forum/support/dispatch.cgi/support |
| Customization: | http://support.sitescape.com/forum/support/dispatch.cgi/custom |
| Help: | http://help.sitescape.com/ |

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

How Can Forum Help Our Organization?

After installing, configuring, and evaluating our product, you may want to think about the way in which you want to use the Forum software to supplement your web sites. The following are three common ways in which our customers deploy Form:

- As a traditional web application

In this capacity, your users visit your organization's existing web pages, click on a link, and then view Forum pages. In this way, your users see Forum as a separate web application; they move from your organization's web page to Forum and back again.

Here are two common scenarios in which customers use Forum:

- Internal collaboration

People within your organization use Forum to collaborate and facilitate teamwork.

- Customer interface ("extranet")

Your organization uses Forum as a way to communicate, serve, or collaborate with your customers and business associates. Examples of this type of Forum use include providing a Help desk, accepting problem reports about your product or service, marketing future products and services, and so on.

The web and Forum are transforming what is "inside" and "outside" of your business. Using Forum beyond your firewall, workers on your Intranet meet and collaborate with customers and associates on the Internet.

- As collaboration infrastructure

If you choose, you can make Forum "disappear" into your web site, so that your users experience our collaboration tools as being another part of your web site. Forum is so customizable that you can give our pages the same look-and-feel as those on your web site. Then, on your web site, you can add a link that says, "To discuss the latest project, click here," and users can use Forum to conduct online discussions and share documents. And, to your users, it feels as if they never "left" your web pages.

- As a way of generating e-commerce direct revenue

Forum includes powerful, automated e-mail notification features. Using straightforward administrative tools, you can have Forum automatically send e-mail to your registered users every time there is a change made in a docshare forum. And the e-mail notification provides links that make it easy for the receiver of the mail to enter the Forum to check out the latest additions.

In addition, it is possible for users to "post" information into Forum using e-mail (your users do not have to "access" Forum to enter discussion topics and documents).

If your business benefits financially from traffic on your web page or according to generated e-mail, consider using Forum to automate this process.

Common Collaboration Roadblocks

You have installed Forum and configured your web server. You have dutifully performed the initial configuration tasks listed in the Help system. That should be enough, shouldn't it?

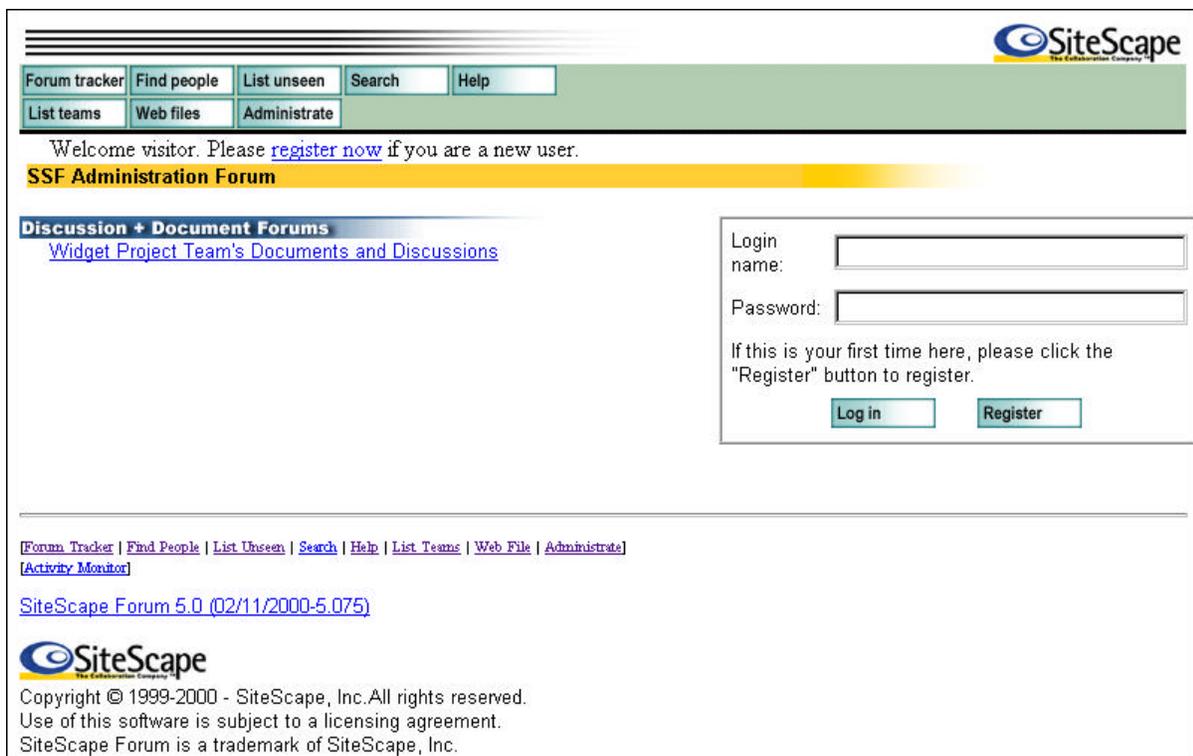
In our experience, after performing the tasks listed in the previous paragraph, one of the following happens:

- Nothing...no one uses the software.
- Employees "figure it out themselves," and develop a vibrant, online, collaborative space.
- Everything in between.

The information in this section explains what prevents many organizations from achieving the full potential of Forum.

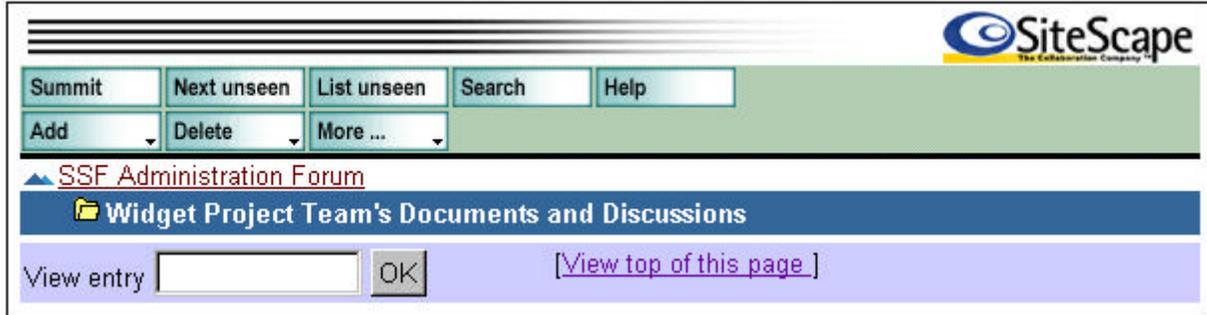
Underpopulation

After you install and complete the initial configuration of Forum, this is what the user sees after they access Forum's summit page:



The screenshot displays the SiteScape Forum 5.0 user interface. At the top right is the SiteScape logo. Below it is a navigation bar with buttons for Forum tracker, Find people, List unseen, Search, Help, List teams, Web files, and Administrate. A welcome message reads: "Welcome visitor. Please [register now](#) if you are a new user." Below this is a yellow banner for "SSF Administration Forum". The main content area is titled "Discussion + Document Forums" and contains a link to "Widget Project Team's Documents and Discussions". To the right is a login/register form with fields for "Login name:" and "Password:", a message "If this is your first time here, please click the 'Register' button to register.", and buttons for "Log in" and "Register". At the bottom, there is a footer with a navigation menu: "[Forum Tracker | Find People | List Unseen | Search | Help | List Teams | Web File | Administrate | Activity Monitor]", the version "SiteScape Forum 5.0 (02/11/2000-5.075)", the SiteScape logo, and copyright information: "Copyright © 1999-2000 - SiteScape, Inc. All rights reserved. Use of this software is subject to a licensing agreement. SiteScape Forum is a trademark of SiteScape, Inc."

If the user is brave enough to click on the link to the docshare forum, this is what that person sees:



This problem is called *underpopulation*. Underpopulation means that there is so little information and content on the page that the user cannot use intuition to figure out what to do next.

You can assume the following about your users:

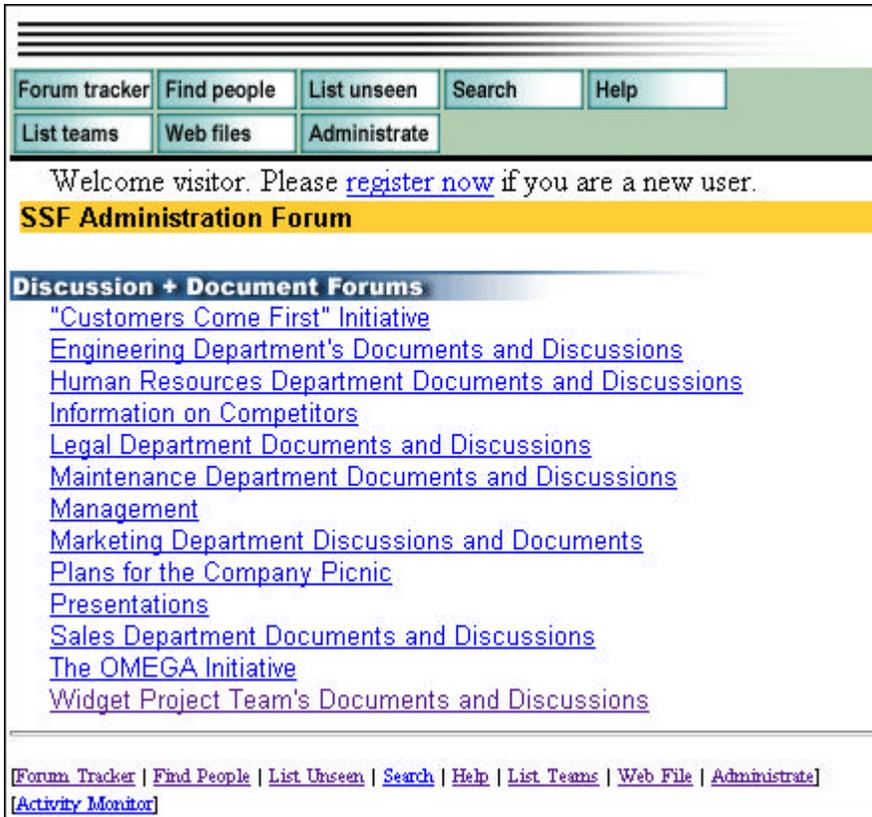
- Users need instruction.
- Users need examples.
- Users need to be able to see immediately the connection between the Forum page and the work that they do.

For example, if there was a “Staff Meeting Agendas” folder in the docshare, they could assume that this folder held the agendas for their weekly staff meetings.

- Users with very little computer experience will not randomly click on links unless they are convinced that it is safe to do so.

Overpopulation

Let's say that the Forum administrator wanted to help out the users, but had a little bit too much caffeine that morning. In that case, the user might be greeted with the following when accessing Forum's summit page:



This problem is called *overpopulation*. Overpopulation is when the administrator places so much information in Forum that it is not evident where to begin. Overpopulated summits and forums can feel overwhelming to users.

Another example of overpopulation is when you create a very large folder hierarchy (perhaps based on an organization chart) and then bury an important document deep within the hierarchy.

Overpopulation is also a problem because it attempts to impose an organizational structure on users that may or may not have any relation to the ways in which people actually do their work.

No Relationship to the Work

As mentioned in the previous sections, users need to see immediately how the content of the forums relate to the ways in which they do their work. Also, it helps if the content in the forums can assist them in completing their work, or if participation in the forums was clearly connected to success and reward within the organization.

The following are examples of information in Forum with clear and unclear connections to how people do their work:

- Clear connection: “If I participate in the ‘Meeting Agenda’ folder, I will be prepared for Monday’s meeting.
- Clear connection: “My boss just sent an e-mail message that asked me to review a document in Forum.”
- Unclear connection: “I see a file named prod_spec_453.ppt sitting in a near-empty folder.”

Here are some other points to consider in regard to connecting Forum-use to the ways in which people work:

- Users will go to Forum if it is the only place to locate important information:
 - Example: Human Resources Policies and Procedures
 - Example: The Corporate Calendar
- People tend to use Forum if their managers do.
- People will use Forum if their managers reward them for it.
- People will use Forum if the formal and informal team leaders do.
- People will use Forum if you hold meetings online (using docshare’s HTML chat feature, for example).

Corporate Cultural Dis-Incentives

If the company or organization rewards behavior that runs counter to using Forum (or punishes collaborative behavior), then people will not use Forum.

For example, if a worker shares a document using Forum, and someone takes the document, uses it, takes credit for it, and is rewarded for doing so, then people will not use Forum.

Another factor to consider is that people who are not used to using computers will not use Forum. If you work in an organization or company in which people tend not to use computers to do their daily work, then you may need to do some work increase computer use (for example, computer training, or requiring computer use in some way).

Difficulties Logging In

As with people, first impressions in working with software count. If the user struggles to figure out how to register and log in, the user may be left with the impression that using Forum is difficult and more trouble than it is worth. Also, people do not want to feel as if their time is being wasted.

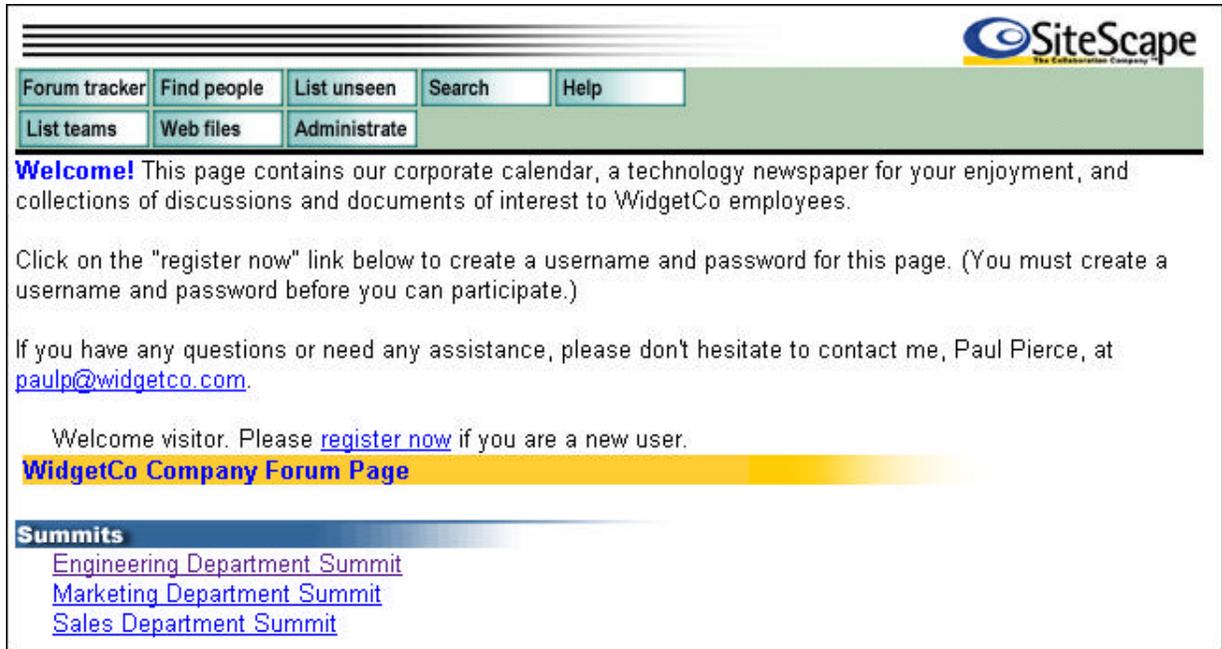
Facilitating the user’s ability to log in quickly and easily can increase the likelihood that the user will return to the software to collaborate online.

Facilitating Forum Use

This section describes the actions you can take to counteract the roadblocks to collaboration described in the previous sections.

Communicating with Users

On one level, communicating with users means making sure that your organization of summits and forums be logical, and that the forums' pages contain adequate instructional information. Consider the following picture, which shows the top of a summit page:



The screenshot shows the top of a summit page on SiteScape. The navigation bar includes buttons for 'Forum tracker', 'Find people', 'List unseen', 'Search', 'Help', 'List teams', 'Web files', and 'Administrate'. Below the navigation bar, the page content includes a 'Welcome!' message, a 'register now' link, and contact information for Paul Pierce at paulp@widgetco.com. A yellow banner reads 'WidgetCo Company Forum Page'. At the bottom, a 'Summits' section lists links for 'Engineering Department Summit', 'Marketing Department Summit', and 'Sales Department Summit'.

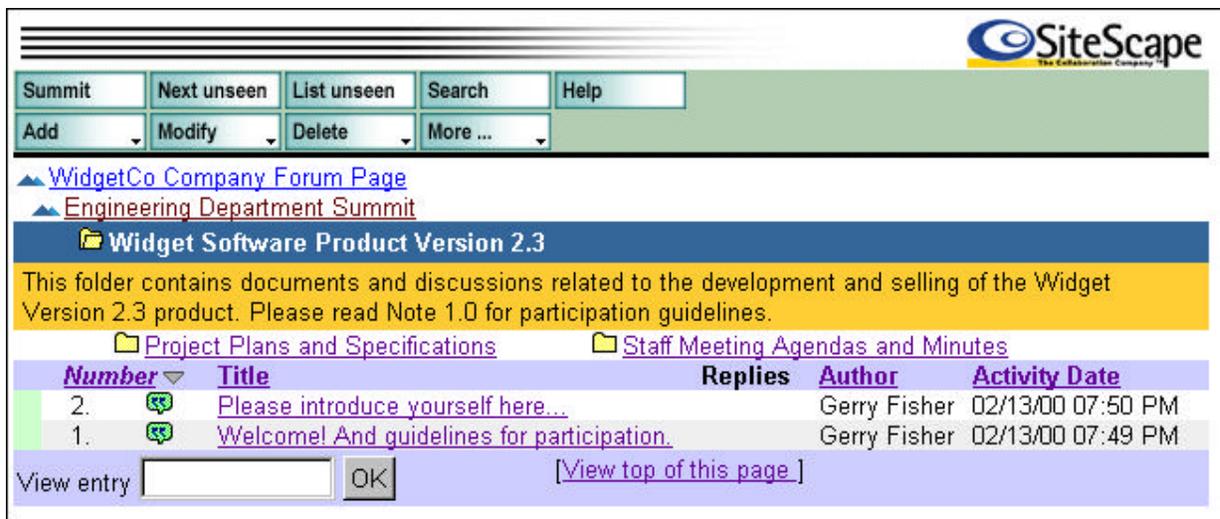
This summit page contains information that assists the user in registering, and provides contact information in case they need to “talk to a real person” about getting started with Forum. Also, notice that this summit organizes departmental information and activity in cascaded summits. Cascaded summits are very useful for providing work areas for large subsets of your top summit's users.

Consider the following picture, which shows the bottom of the same summit page:



The summit page presents information that is highly likely to be relevant to all of the users of the top summit (corporate-wide information). The forum titles tell the user whether they can participate or only read the forum. And this summit provides a newspaper (for fun) and a corporate calendar (which is a forum that is likely to draw users to the summit).

Consider the following picture, which shows the top folder of a docshare forum:



This folder contains clear instructions, subfolders that appear to be meaningful at a glance, and uses the first few topics to instruct and get people communicating with one another.

This summit page and docshare folder do a good job of providing enough meaningful information with which users can get started with using Forum, but the information does not confuse or overwhelm. Also, since the administrator did not “fill up” the summit or docshare forum, it allows users to play an active role in future structuring and content.

On another level, communicating with your users means...well...talking to them about how they do their work. For example, perhaps the Engineering, Marketing, and Sales departments are so active that they could use their own cascaded summit pages. However, maybe the Human Resources and Maintenance Departments do not plan on using Forum extensively. Then, create cascaded summits only for those departments whose work currently calls for them.

As another example, the Marketing Department may have monthly meetings that require an agenda and the taking of minutes. So, creating a “Meeting agendas and minutes” docshare or folder may work for the Marketing Department, but it may not work at all for Engineering and Sales.

Here are some guidelines about the types of communication you need to do with your users:

- Understand both their business (the “content” of their work) and how they do their business (the “process”).
- Consider brainstorming with users about how Forum can best meet their needs.

Example: The legal department needs individuals to sign off on documents, so you can create a workflow process for them that obtains electronic “sign offs.”

- Consider holding user training for Forum to increase interest and communication.
- Obtain buy-in to use Forum from formal and informal leaders in your organization.

Example: You can delegate administrative privilege for cascaded summits or individual docshare forums. In this way, others will play a role and feel invested in the success of Forum in your organization.

Organizing Information

Here are some points to consider when organizing information presented in Forum:

- Determine if you have large subsets of active users.

Example: If the top summit is for all employees in the company, and if the Engineering department will be large and active, then create a cascaded summit for that department.

- Determine if you have supersets or distinct sets of active users.

Example: If the top summit is for company employees, and if you want a work area for employees to conduct business with customers, then create a new ACA outside of your company’s firewall.

- Create a few focused docshare forums (for example, policies and procedures “read only” forum, a docshare forum for a project).
- When docshare forums lose their focus or become too big, move information to folders, use the import/export feature to move information to new docshares, or use the archive and restore feature to move several docshares of information across installations.

Facilitating User Log Ins

The easier you make user logins, the better Forum’s first impression will be with the user. The following are login options to consider:

- Require that people contact an administrator to register, set up NT authentication, assign people the same username that they use for NT domain logins, and then users log in using the same username and password at their NT domain log in. (They do not have to remember another username and password.)
- If your organization uses NT domain servers, and if all or nearly-all of your users use Microsoft Internet Explorer browsers, then set up NT Challenge and Response. After

the user provides some initial NT login information, future logins are automated (as long as they are logged into their NT domain, they are logged in automatically to Forum).

- Use the LDAP synchronization feature to keep user-profile information automatically up-to-date with your corporate X.500/LDAP information. (So, you do not have to maintain several sets of user information.)

Balancing Pre-Population with Organic Growth

As mentioned earlier, you need to provide some structure and information so that people feel comfortable getting started and participating. However, you also want to allow your users to participate in further restructuring (for example, the creation of cascaded summits, the creation of folders, and the creation of new docshare forums).

Ways to Draw Users into Forum

The following are ways in which you can draw people into using the Forum:

- Create a populated corporate calendar.
- Place your Human Resources policies and procedures online in Forum.
- Place items in Forum that must be reviewed, or require that people place information in Forum before they attend a meeting (for example, to build an agenda).
- Place a document in Forum that must be co-authored.
- Place all announcements from management in Forum.
- Place training announcements in Forum.
- Create a workflow process so that workers must access Forum to sign up for training (and the workflow process can require an electronic sign off from the person's manager before she or he can attend training).
- Place training modules and follow-up discussions in Forum.
- Create a docshare forum, and use the Send Mail feature to invite people to participate.
- Set up e-mail notifications when you register someone, so that person automatically receives e-mail notifications about docshare-forum activity.
- Reduce the information in e-mail and use it primarily as a "pointer" to Forum.
Example: "Let's meet tomorrow...see Forum for the agenda."
- Conduct online meetings using the docshare HTML chat feature.
- Include areas in which people can have fun (for example, a newspaper can be light-hearted and fun).

Remember that you want to create a "virtual office space." Like a real office, that space should contain areas in which a work focus is important, and areas in which workers can "take a break."

Issues Regarding Political Incentives to use Forum

Not all of the roadblocks mentioned previously can be solved through Forum administration. Most organizations that successfully implement Forum either have or obtained political buy-in for online collaboration.

Here are some ideas to consider regarding political solutions to collaboration roadblocks:

- Obtain agreement from management that some information can be found only in Forum.
- Get managers (and formal and informal team leaders) to use Forum, especially for management announcements, speeches, and other writing.
- Discuss with managers the potential rewards for people who effectively use Forum to produce quality work.

Example: Forum administration can be considered a valid part of someone's job plan, and that person can be measured on the successful implementation of Forum.

Administrative Tasks

To implement some of the suggestions in this manual, consult the following topics in the Administration Help system:

- Administration home page

 - Creating a workflow process

 - Deciding when to create additional summits (cascaded summits and ACAs)

 - Using the summit administrative tools menu

 - NT logins

 - LDAP synchronization

 - Managing news sources

 - Administering individual forums

 - Delegating administrative tasks for a forum

Next Steps

After you populate Forum with some information to help users to get started (but not too much information), talk to your users, and let the growth and development of Forum be a collaborative effort. The only way for the Forum structure to mirror the ways in which people in your organization work is to involve them in the process.

If you need additional support or information (for example, about defining workflow processes, setting up NT logins, or customizing Forum), please participate in SiteScape's support, customization and help forums, at the following URLs:

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

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

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

The appendix that follows was written for SiteScape by Richard Seltzer. Many of the ideas in this manual were inspired by Richard's white paper.

Appendix A: Breaking Down the Barriers to Effective Online Collaboration

By Richard Seltzer, Internet Evangelist
B&R Samizdat Express

High tech companies got the message first. Now established firms in all industries are finally waking up to the fact that the Internet changes everything—that they face a new competitive environment. Some online startups, like Amazon and eTrade, have grown mammoth in a very short time and now challenge the giants of their respective industries. Others, like eBay, have defined whole new lucrative markets. Still other online companies have carved out small but profitable niches and serve world markets with small and virtual staffs.

To survive these days, you must change—not just once, but again and again, in response to changing customer needs and the agile moves of your new competitors.

Legend has it that the Internet can help you put the right information in the hands of the right people at the right time. It can help you turn your entire workforce into a team for gathering, organizing, refining, and disseminating information and turning it into useful knowledge. It can help empower all your employees to contribute to the common pool of knowledge, which helps the company as a whole better, more quickly, and more flexibly serve and respond to partners, customers, and prospects. Widespread, online collaboration becomes the engine driving change, helping companies to survive and even thrive in these challenging times.

There's some great web-based software available that makes that vision look very realistic—like a 3-D movie, what you want looks so close you think all you have to do is reach out and grab it. If only it were that easy....

Clarifying the Issues

If You Buy It, Will They Come?

The pace of technology advancement has created an interesting and troublesome gap between the possible and the real, between what technology enables and what people actually do with it.

Internet technology makes possible collaboration within and among work groups and companies. Companies buy and install collaboration software at their public web sites, then expect discussions with their partners and customers to start and snowball. But their own people still don't have a clue how to use these capabilities internally, much less externally.

Yes, the technology is necessary. But without trained, experienced, motivated, creative, dedicated people, nothing happens. The forums and the chat rooms remain empty—both inside your company and on the public Internet.

You need to be able to conduct online discussions inside your company before you can expect to hold them successfully with partners and customers and prospects.

Changing the Corporate Culture

In many companies, the base problem is the corporate culture—a culture which, in fact, encourages people to hoard, not share information.

Typically, managers and employees see information as a source of power and job security. They are rewarded for what they know (to the exclusion of others) rather than for what they freely share. As a result, critical information does not flow to people who need it, making it very difficult to see interdependencies, and to respond rapidly to problems and opportunities.

This closed environment leads to duplication of effort, inefficient work patterns, lack of focus—high costs and missed revenue.

Management may make large investments in technology to make corporate-wide collaboration possible. But ingrained habits, reinforced by the corporate culture, pull in another direction, undermining the purpose of the technology. Just because information can flow, does not mean that it will flow.

To change this behavior, to take advantage of the creativity of the full diverse range of people and experiences in your company, you need to change the motivation of your employees—what they perceive as the recognition and reward system.

Interestingly, the web-based collaboration software that you want to use for exchanging information can also serve a tool for helping transform your corporate culture.

Walk Before You Run

The first step is to make it easy for those who are inclined to share information to do so. That means establishing policies that enable anyone to post company-relevant information on the internal web. It also means setting up "free-speech" zones—discussion areas where individuals can state their honest opinions about business matters without fear of retaliation; giving that freedom the authority of policy, and quickly providing precedents so the message gets out that this is real. In addition, it means providing clear guidelines regarding online behavior—what is acceptable and what not—to avoid having a few individuals disrupt the useful discussions of others.

The software you choose should make it easy to upload existing documents and make them available over the internal web, with conversion to HTML happening automatically. Non-technical people should be able to participate by simply typing in their responses. The software should enable both real-time (chat) and bulletin-board style (forum) discussions, and should have built-in security, so documents and discussions can be set to be viewable by all or limited to those who have a need to know.

And it should include powerful search capabilities and navigation tools, so that as the content grows, everyone can still easily find whatever they want. It should also be integrated with e-mail—with forum postings sent by email subscription to those who request them, and with forums accepting messages submitted by email—so people can choose the style of interaction that best suits their work style and personality.

Training Enables Creativity

In addition to licensing and installing this software, you should provide related training for those who want it. Even if the software is easy to understand intuitively and is very user-friendly, training can help your people recognize creative ways that they could use it in your business context; it can help get them engaged and committed.

Remember, once your employees have this experience internally (and your company is reaping the benefits of their efforts), they will become a valuable trained resource for the kinds of discussions you want to hold with partners, customers, and prospects.

Get Top Management Involved

Second, you should let all your people know what is available to them. This includes articles in company publications (online and in print), and mentions in speeches by top executives. It also includes providing links to the discussion areas and explanations of their purpose and importance on your Intranet home page and other key reference pages. That not only helps people find these discussions, but also sends a clear signal that this activity is sanctioned and supported by top management.

Reward Cutting Edge Use

Third, you should officially recognize and reward those who use this capability often and well, within the context of existing recognition and reward programs. You could, in addition, create web pages, complete with photos and bios, for recognition/reward of individuals who use this new medium well and thereby benefit the company.

You should also single out these individuals for advanced training in these same tools, because they are the ones most likely to share their learning with their colleagues, and also because these advanced training opportunities will serve as another tangible reward and recognition for their good efforts. Then as forums become more active, the individuals who are most articulate, knowledgeable, and helpful will become recognized directly through the fruits of their efforts.

To speed up this process, you could set policy which leads to the regular posting of key documents in the forum discussion areas for general comment, and also encourage the use of forums as an adjunct to regular meetings—a place to post agendas, minutes, and lists of action items, with their follow up. If this kind of behavior becomes common place at the highest levels of the corporation, it will likely be adopted at lower levels.

Remember, tools are only of value if people use them, and people only use them if they believe they'll benefit from their use.

Extending Your Reach

You can use the web-based collaboration tools to help reshape your corporate culture—to convert personal knowledge to corporate knowledge, and to create an environment where personal advancement derives from sharing knowledge rather than hoarding it.

Once you solve that challenge, you will be in a far better position to use these same tools to build better relationships with partners, customers, and prospects—to survive and thrive in the new Internet business environment.

* * *

Tactics for Effective Collaboration

1. *Seed your forums with useful content*—Forums need to reach a critical mass of content before they become interesting and self-sustaining. One good way to generate useful content quickly, is to schedule chat sessions with experts on topics of current business importance and save the transcripts. (SiteScape Forum lets you embed chat discussions in forums and automatically generates transcripts.)
2. *Stimulate discussion*—Post not just static documents, but also messages that invite discussion, by broaching controversial topics and dealing with matters that need to be resolved. Do everything possible to generate lots of interesting content.
3. *Create stakeholders*—The success of online discussions is not in the control of your IT department. Rather it depends on the content and the participants. You need key content people to have a stake in the success of your various forums. To get off to a quick start, you should assign experts and moderators, for different topics—providing them with training and then making this an important part of their jobs, on which they will be rated and rewarded.
4. *Hold regular online meetings*—Your top managers should periodically hold online meetings instead of face-to-face meetings with their reports using chat. Using the HTML based chat built into SiteScape Forum, the transcripts could be automatically saved, and be available for search and continuing comment by those authorized to participate. Top managers should also post minutes of their face-to-face meetings in those same forums, carry on between-meeting discussions using forums, keep track of action items, and conduct other related business in those same forums.
5. *Use professional facilitators*—Before people are used to this new medium, bring in a professional facilitator to help make important online meetings more effective (like bringing in a facilitator for a face-to-face meeting).
6. *Use SiteScape chat/forums for training*—Existing training programs should use chat/forums to supplement their normal activities, enabling pre- and post-course discussion. And SiteScape should also be used for delivery training about the use of SiteScape.
7. *Involve partners and customers*—As an experiment, use this same capability to hold special events to which you invite partners or customers, to share with them and learn from them, at the same time helping them to become familiar with and comfortable with this communication environment.