SiteScape Forum
Win Together

Quick Start Guide

This manual provides a list of steps that Forum users need in order to begin using the product as quickly and productively as possible.

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Introducing SiteScape Forum

SiteScape Forum is a program that you access using your web browser (such as Internet Explorer or Netscape Navigator) to collaborate with teammates, either across networked computers inside of your company or across the Internet.

Collaboration using Forum is a way to bridge the gap between working alone at your computer and working together with your teammates during meetings. Forum creates a "virtual meeting space" online. In this space, you will see an increase in team synergy in the following ways:

- Ideas are formed together, interactively, with your teammates. By the time you hold that meeting in the conference room, the team has already been a part of the formation of the idea and is more likely to understand it, buy into it, and assist with its implementation. Forum becomes a "pre-meeting" meeting.
- Documents are reviewed earlier in the process, allowing easier modifications and adjustments. The Forum software also makes it easier for more than one person to write a document, because you can use our software to control who has access to the document and when they can have access to it.
- Forum allows everyone in a company, in an organization, or on a team, to work from the same online calendar. Literally and figuratively, everyone is "on the same page."
- Since Forum software is Internet software, the movement from "Forum" to "the Internet" is seamless, integrated, easy, and fun.

Forum presents its web pages within your browser's window, and you move from page to page by clicking on *hyperlinks*. Hyperlinks are often shown in a different color and are sometimes underlined. When you click once on them, your web browser displays another page.

Forum also uses *toolbar buttons* to present new pages and information to you. Toolbar buttons are located at the top of the Forum pages, and they enable you to see items that you have not yet seen, search for items, and obtain help.

Next to the toolbar, Forum displays a *drop-down tools menu*. Using this menu, you can add new discussion topics and documents, delete items that you own, send e-mail, and more.

The toolbar and drop-down menu are described in more detail later in this book.

What are Forums?

Generally speaking, "forums" are places where people gather to discuss a topic. Using SiteScape Forum, a *forum* is an online work area where a certain type of information is presented. The following are the different types of forums included in our product:

- **Summit Page—**Is Forum's "home" or "starting" page. It contains a list of all the other forums to which you have access.

- **Discussion and Document-Sharing Forum** (nicknamed "docshare")**—**Contains folders of discussions and documents. People can create discussion *topics* that are *posted* (placed on) the web page. At some later date, a teammate can post a *reply* to the topic. In this way, an online discussion forms over time.

  Or, you can use this forum to create, edit, review, or distribute documents (such as Microsoft Word files, spreadsheets, pointers to pages on the Internet called *URLs*, and more).

- **Calendar—**Allows you to schedule appointments, list "to do" items, and more.
- **Newspaper—**Displays online news articles, tracked web pages, and Internet newsgroups. It's easy to clip articles, save them, or share them with teammates.
- **Chat—**Allows people to hold more interactive discussions online. These discussions happen by teammates being at their computers during the same block of time, with people reading and adding comments dynamically, moment by moment, as they choose.
- **Team Page—**Creates a separate, "private" space, apart from the other users on the summit page. In this space, a team can develop a project in private before making its work more public.
- **Forum Tracker—**Is a personal "home" or "starting" page for individual users of Forum. Using this page, you can keep track of *activity* in the forums most important to you, such as newly added replies to a discussion, newly added documents, or a change made to a topic, reply, or document. You can also maintain a list of URLs that point to your favorite web pages, keep a personal file area, maintain a personal calendar, and have a private collection of pointers to your favorite types of news articles.
- **Help—**Describes the Forum product and helps you to use it.

Some of the forums are a single set of pages (there is only one summit page and Help forum, for example). With other types of forums, your administrators can create several *instances* of that type of forum.

For example, a summit page can list a Discussion and Document-Sharing forum called, "Company Policies and Procedures." When you click on the hyperlinked forum title, all of the discussion topics and documents are about that one topic. There can be another Discussion and Document-Sharing forum called, "Company Open Forum," which contains a free-form discussion area for the company. And so on.

Also, there can be a company calendar, a department calendar, a team calendar, and every team member can have an individual calendar.

What is in this Book?

This book provides very brief instructions for first-time Forum users on tasks necessary to begin using Forum quickly and effectively. The beginning of every section provides a list and a description of each task (what it is, what it accomplishes, and why you might want to do it). The "User Steps" section that follows contains the actual steps you must perform in your web browser in order to complete each task.

This book contains screen snapshots to assist you with your tasks. If you would prefer to view graphics with sharper resolution and clarity, view the Microsoft Word version of this file (`QuickStart.doc`).

Where can I get More Information?

For more information, you can read the description of the product in the Help file. To access the Help file, click on the following button, which is located in the Forum toolbars:

Or, while you are using Forum, there are sometimes **Help** buttons located at the bottom of the page, which look like the following:

Using Forum

This Quick Start page provides a list of the most common tasks that you need to do when you start using SiteScape Forum. To view a list of how to perform one of these tasks, read the “User Steps” section that follows this table.

What you need to do…	Why you want to do it…
Register as a User.	Most installations of Forum require that you register by providing a username, a password, and other information. Installations of Forum either allow you to register yourself, or they require you to contact an administrator so that she or he can register you.
Log in to Forum.	If you do not log in, default Forum installations allow you only to view entries, and do not allow you to participate in discussions or share your documents. (If you do not log in, you are considered to be an anonymous user.) Some installations even forbid viewing unless you log in.
Change your password.	This is an optional task. If you are happy with your password, you can keep it. If an administrator gave you a password, and if you want to change it to a password easier for you to remember, then you can change it.
View information.	Once you log in, what can you do with Forum? You can view "forums" (which are listed on the summit page), discussion topics, documents, information about people using Forum, and more.
Add a document to a Discussion and Document-Sharing forum.	After viewing the contents of forums, you will want to participate by sharing documents with your teammates.
Add a discussion topic to a Discussion and Document-Sharing forum.	After viewing the contents of forums, you will want to participate by starting discussions with your teammates.
Add a reply to a topic.	You may want to participate in a discussion topic that someone else already started.

User Steps

Register as a User

If the summit page says that you must contact an administrator to register, then ignore these steps and follow the contact instructions on the summit.

The following are instructions for a default installation of Forum. Since Forum is highly customizable, the wording on the pages in your browser may appear differently than what appears in these lists. However, the steps and general concepts should still be the same.

1. View Forum's *summit page*.

   This is Forum's home or "starting" page. The summit page contains links to all of the tools and work areas provided by Forum.

The default URL (the address that you supply to your web browser) for a Forum summit page appears similar to the following:

http://www.*company*.com/avf/aca-1/dispatch.cgi

In the previous example, replace the italicized parts of the URL with values that apply to the installation of Forum you are using.

The summit page contains links to "forums" or "applications" that allow you to have online discussions, share documents, view calendar entries, read news articles, and more.

2. Click on the **register now** hyperlink, which is located toward the top of the page, under the graphic and toolbar buttons.

   In a default installation, this hyperlink is contained in the following sentence:

   Welcome visitor. Please **register now** if you are a new user.

3. In the "User Registration for..." form, provide the information requested at the top of the form, as follows:

   - Login name
   - Full name
   - Password

   Be sure to specify your password twice, once in the "Password:" text box, and again in the "Once more:" text box. Remember that passwords are case sensitive (if letters are uppercase, you must type them in uppercase, and so on).

   If you do not specify the three items at the top of the form, then Forum will not accept your registration.

   You can provide as much or as little of the remaining information on the form as you like. Consider providing an e-mail address, however, since Forum places links to your e-mail on items you create. It makes it easy for other users to get in contact with you.

   Notice the items toward the bottom of the form. (For example, the items in the "Forum Tracker" and "Other Preferences" sections.) These are "user preferences" that can affect how the Forum looks and feels to you, and how it operates when you use it. New users can ignore these items for now. After you have gotten used to using Forum, you can go back and modify these values later.

4. When you are finished, click on the **OK** button at the bottom of the page.

Log In

The following describes logging in to a default installation of Forum:

1. View the summit page.

2. Click on the **Log In** icon, which is located in the top, left corner of the summit page, which appears as follows:

3. On the SiteScape Forum Login form, enter your username.
4. Be sure to type the correct case (lower- and uppercase) for the letters in your username and password.
5. When you are finished typing your username, press the Enter or Return key, and Forum and your browser move the cursor to the next text box. (If you are using an older browser and this does not work, use your mouse button to click on the next box, or press your Tab key to move to the next box.)
6. When you are finished typing your password, press the Enter or Return key, and Forum and your browser submit your log in information. (If you are using an older browser and this does not work, click on the **OK** button, or press the Tab key followed by pressing the space bar to submit the information on the form.)

Forum displays the summit page again. If you are using a default installation, then Forum changes the welcoming text to welcome you by the name you provided when registering. Notice that your name in the welcoming message is hyperlinked. When you click on this hyperlink the Forum displays your *user profile*, which is a summary of the information about you (as provided when you registered) and about the parts of the summit to which you have access.

As an option, administrators can configure Forum so that you can use your NT username and password, or so that you do not have to specify any username/password at all.

Change Your Password

There are several ways to change your password. This method contains the fewest steps:

1. View the summit page.
2. If you have not logged in already, log in.

   By default, after you log in, Forum changes the greeting toward the top of the page, and greets you by the name you provided when you registered. By default, the greeting text is located just under the toolbar.

3. Click on your hyperlinked name in the greeting, which, by default, looks like this:

   Welcome **Ben Stiller**

   The bold and underlined text shown in the example above is a *hyperlink*. Hyperlinks on a web page take you to another page when you click on them. Hyperlinks are often shown in a different color and are sometimes underlined.

Click on the **Modify** icon on the "User Profile for..." page, as follows:

4. On the "Modify User..." page, enter your new password in the "Password:" text box, and enter it again in the "Once more:" text box.

   Passwords are case sensitive, so remember lower- and uppercase letters in your password.

5. Click on the **OK** button at the bottom of the page.
6. On the "User Profile for..." form, you can click on the Summit icon to return to the summit, as follows:

View Information

Generally speaking, to view Forum items, click on *hyperlinks* (text that, when you click on it, displays another page of information) or on icons (graphical objects on the page that are hyperlinked to additional pages).

The following steps show you how to view a few of the items found in SiteScape Forum:

Viewing Information about People using Forum

1. View the summit page.
2. Click on the **Find People** icon, which is located in the tool bar at the top of the page, as follows:

3. If you know the name or the username of the person for whom you are looking, you can type the name in the "Search text:" text box and then click on the **OK** button (toward the bottom of the page) on the "Find People in..." page.

   Forum then displays a table of information about users whose information matches your search criteria.

4. Or, if you do not know the name of the person for whom you are looking and want to browse through all of the registered users, click on the **List People** icon located in the tool bar on the "Find people in..." page, as follows:

   Forum then displays a table of information about all of the registered users.

5. To view information about the user, click on the hyperlinked name in the Login Name column of the table.
6. Forum displays the person's *user profile*, which contains contact information, and, optionally, a picture of the person.
7. If your browser is configured to send mail, you can send mail to the person by clicking on hyperlinked e-mail address in the EMail Address column of the table. (For more information about enabling your browser to send mail using hyperlinks, see your browser's Help file or ask your system administrator for assistance.)

<u>Viewing Forums</u>

A *forum* (with a lowercase "f") is a work area within a summit. (The summit page contains hyperlinked titles of available forums.) For example, different types of forums include individual discussion and document storage areas, calendars, and newspapers.

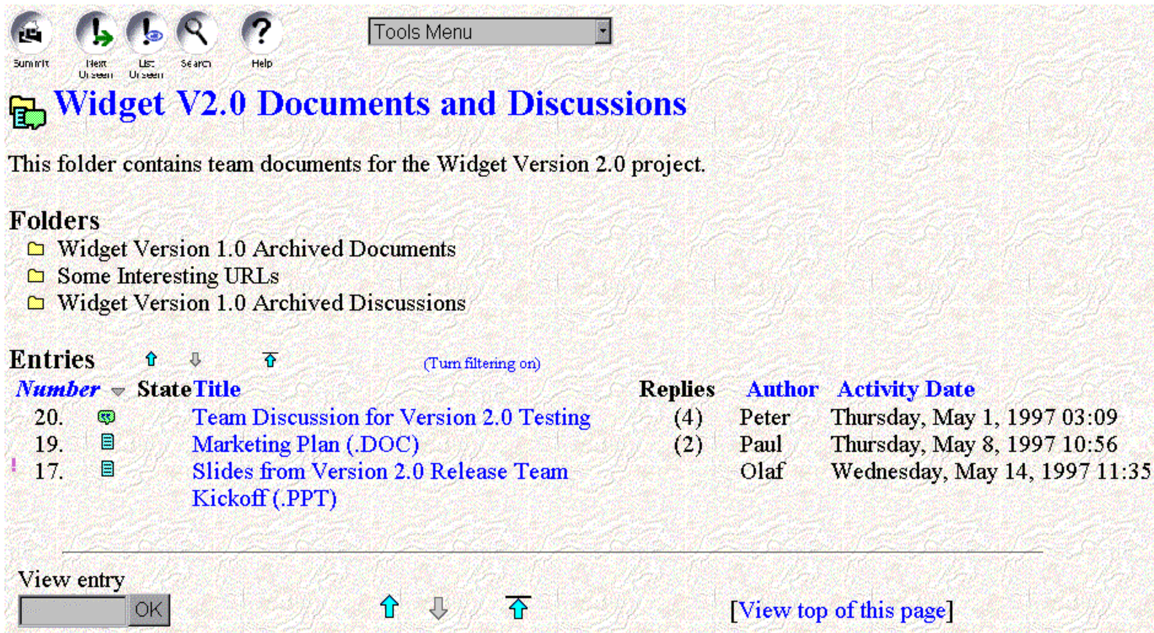
To view forums, do the following:

1. View the summit page.
2. On the summit page, locate the type of forum that you want to view: Summit Forums, Discussion and Document Forums, Newsstands, Calendars, and Teams.
3. This example will show you how to view a Discussion and Document Forum. The Discussion and Document Forum section of the summit appears as follows:

   In the previous example, the indented titles are the hyperlinked names of Discussion and Document forums. Locate the forum that contains the type of information that you want to view. (For example, if you are a member of the marketing team, then the **Marketing Plans** hyperlink in the previous example would be of interest to you.)

4. Click on the hyperlinked title of the forum you want to read.

After you click on the hyperlinked title of the forum you want to read, Forum displays the *top folder* of the Discussion and Document forum, which looks like this:



Viewing a Document

1. In the top folder, locate an item that includes a document icon in its listing, as follows:

   In the previous example illustrating a top folder, the items "Marketing Plan (.DOC)" and "Slides from Version 2.0 Release Team Kickoff (.PPT)" are documents.

2. In the top folder listing, click on the hyperlinked title.

   So, in the previous example illustrating a top folder, if you click on the **Marketing Plan (.DOC)** hyperlink, your browser runs the MicroSoft Word program and displays the marketing plan document. (If your browser does not allow you to view .DOC files, see your browser's Help files or seek help from your system administrator regarding "configuring your browser's helper applications.")

   When you are viewing a file (such as a .DOC file in Microsoft Word), you can use Word's menu items to save the file to your computer's hard drive.

   If you want to save a file to your computer's hard drive without having to view the file first, then view the top folder, use your mouse's rightmost button to click on the hyperlinked title of the document, and save the file to your disk. So, using our previous example, you can right-click on **Marketing Plan (.DOC)**, and a window allows you to save that file to your disk.

Note: Using Windows systems, when you right click on a hyperlinked file name, the system pops up a window that allows you to save a file to disk. If you are using a system that saves files to disk differently, use the method that works for your operating system.

Viewing a Discussion Topic

1. In the top folder, locate an item that includes a discussion-topic icon in its listing, as follows:

   In the previous top-folder example, the "Team Discussion for Version 2.0 Testing" item is a discussion topic.

2. Click on the hyperlinked title of the discussion topic in the top folder.

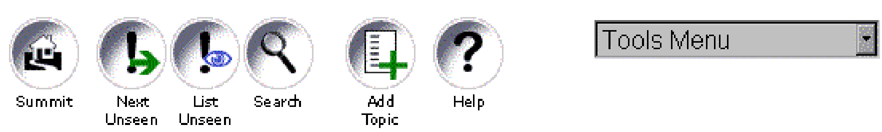
   If you click on the **Team Discussion for Version 2.0 Testing** hyperlinked title, then Forum displays that topic and all of its *replies*.

Add a Document

1. Log in.
2. View the summit page.
3. Click on the hyperlinked title of the forum in the Discussion and Document Forums section of the summit that should contain your document.

   For instance, in the examples shown in the Viewing Forums section, the "Marketing Plans" forum would be a good place to put a Microsoft Word document containing a draft of a marketing plan.

4. When viewing the top folder of the forum, click on the drop-down tools menu. This menu is located toward the top of the page, just to the right of the toolbar icons, as follows:

   To see the items in the Tools menu, click anywhere in the Tools menu's rectangular box, and your browser displays the drop-down list. When you move your cursor up and down the list, your browser highlights menu items. To choose an item, click on it.

5. Choose the **Add Document** menu item.

   After you do this, Forum displays the "Add an uploaded document to..." form.

6. Provide a title for your document in the Title text box.
7. Locate the "Upload a file from your local computer" table, which is located approximately half way down the page.

8. Click on the **Browse** button, which is located to the right of the empty text box.
9. Double click on folder names to locate the file on your computer that you want to upload into Forum.

   Note: Using Windows systems, when you double click on a folder name, the system opens the folder and displays its contents. If you are using a system that opens folders differently, use the method that works for your operating system.

10. When you have located the file, double click on it, which adds the filename to the "Upload a file from your local computer" text box.
11. The remaining items on the "Add an uploaded file to..." form are optional; use them, if you choose. If you are just starting out with Forum, you may want to leave them blank for now.
12. Click on the **OK** button located at the bottom of the page.

    The title that you provided in the Title text box now appears as a hyperlinked title in the top folder. When someone clicks on that hyperlinked title, they view the file that you just uploaded into Forum.

Add a Discussion Topic

1. Log in.
2. View the summit page.
3. Click on the hyperlinked title of the forum in the Discussion and Document Forums section of the summit that should contain your discussion topic.

   For instance, in the examples shown in the Viewing Forums section, the "Team Discussion for Version 2.0 Testing" forum would be a good place to put a topic about how to keep statistics about defect reports.

4. When viewing the top folder of the forum, click on the drop-down tools menu.
5. Choose the **Add Discussion Topic** menu item.

   After you do this, Forum displays the "Add a discussion topic to..." form.

6. Provide a title in the Title text box.
7. Type the text of your discussion topic in the Text text box.

   For example:

   > I'm concerned about how we are going to keep statistics about defect reports. Does anyone have any ideas?

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

   The remaining sections of this form are optional; you can fill them in, if you choose.

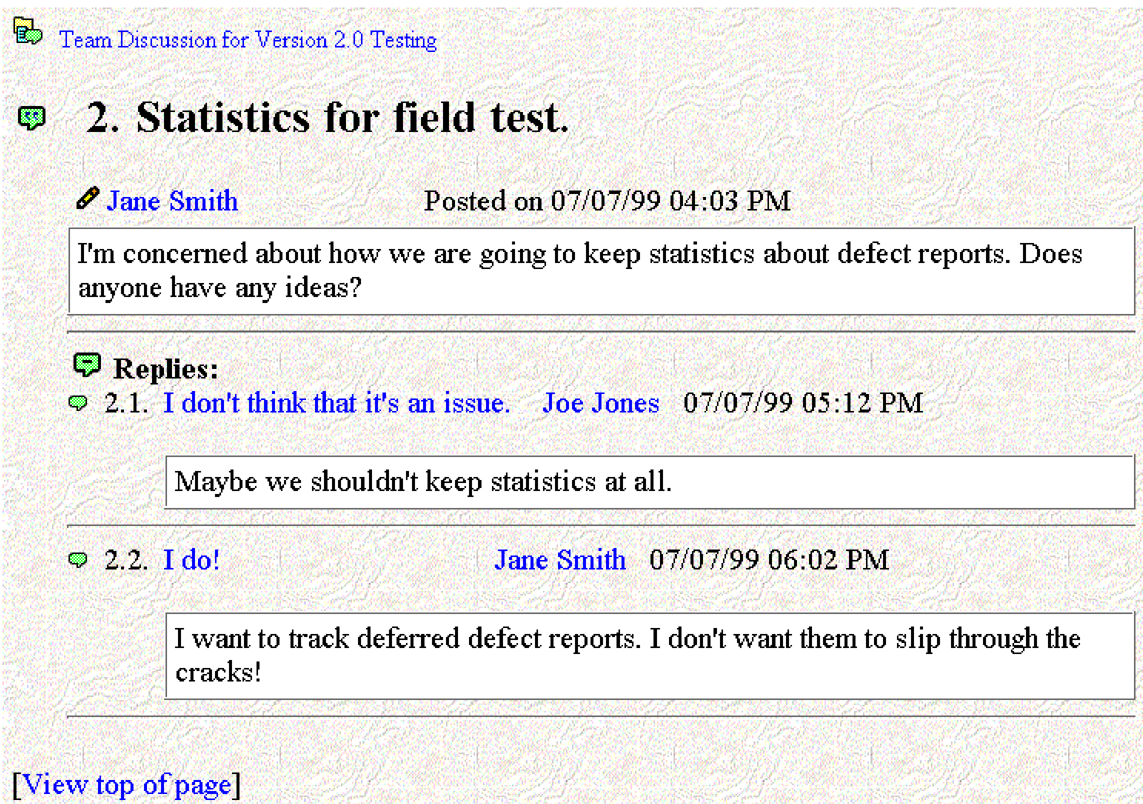
8. Click on the **OK** button located at the bottom of the page.

   The title that you provided in the Title text box now appears as a hyperlinked title in the top folder. When someone clicks on that hyperlinked title, they view the text of the discussion topic that you just entered.

Add a Reply

1. Log in.
2. View the summit page.
3. Click on the hyperlinked title of the forum in the Discussion and Document Forums section of the summit that contains the topic to which you want to reply.
4. Click on the hyperlinked title of the topic to which you want to reply.

   When Forum displays a discussion topic, it appears as follows:



5. To add a reply to the end of the reply chain for this topic (your reply would be numbered 2.3 and would be placed after Jane's "I want to track deferred..." reply), click on the Tools menu, and choose the Reply menu item.
6. Fill out the Reply form, which is very similar to the form used to add a topic.
7. Click on the **OK** button at the bottom of the page.

   Forum adds the reply to the discussion topic.

In the previous example that illustrates a topic and a reply, notice that the reply's title is hyperlinked. If you want to "reply to a reply," which inserts the reply into the middle of the reply chain, click on the hyperlinked title of the reply to which you want to reply. (For example, in the previous example, a reply is number 2.1, and its hyperlinked title is **I don't think that it's an issue**.)

After you click on a reply's title, Forum displays only the individual reply. Then, click on the Tools menu and choose the "Reply to this reply" item. After you fill out the Reply form and click on the **OK** button, Forum adds your reply in the middle of the chain, directly after the reply to which you are replying.

Using this example, Forum would insert a reply numbered 2.1.1, and it would appear as follows:

2. Statistics for field test.

Jane Smith Posted on 07/07/99 04:03 PM

I'm concerned about how we are going to keep statistics about defect reports. Does anyone have any ideas?

Replies:

2.1. I don't think that it's an issue. Joe Jones 07/07/99 05:12 PM

Maybe we shouldn't keep statistics at all.

2.1.1. Like, we need more information! Sarah Michelle Gellar 07/07/99 05:12 PM

Where are you coming from, Joe? How come you don't think it's important to keep statistics?

2.2. I do! Jane Smith 07/07/99 06:02 PM

I want to track deferred defect reports. I don't want them to slip through the cracks!

More About Using Forum

This Quick Start section provides a list of a few more of the most common tasks that you may need to do when you are a new SiteScape Forum user:

What you need to do…	Why you want to do it…
Delete a discussion topic, a reply, or a document that you had entered.	You may want to remove a discussion topic, a reply, or a document after you have posted it. If you choose, you can delete the entry.
See *notification* notes about newly entered or modified documents or discussion topics.	If you prefer, you can view brief notes about the recent activity in a forum.
Receive e-mail notifications about newly entered or modified documents or discussion topics.	If you prefer, you can receive your notifications in the form of an e-mail message that Forum sends to you automatically, on intervals specified by your administrator, that summarize recent activity in the forums you want to keep track of.
Track activity in selected forums.	If you prefer, you can monitor a "count" of new and modified entries in one or more forums without actually accessing the forums themselves. You can enter the forum only after there has been a sufficient amount of new activity.
View newly entered or modified entries.	Once you enter the forum, you can access new entries in two different ways: by stepping through new entries one at a time, or by viewing a list of new entries.
Modify information in your user profile.	You may need to update your personal information, reflecting a new phone number or e-mail address. Or, you may want to change user preferences, such as the native language of Forum's pages. Or, you may want to upload a picture of yourself to include in the user profile.

User Steps

Delete an Entry

1. View the summit page.
2. Click on the hyperlinked title of the forum that contains the topic, reply, or document that you want to delete.
3. If you want to delete a document or topic that is listed in the folder's table of contents, then skip to the next step.

   If you want to delete a reply, click on the hyperlinked title of the topic or document that includes your reply.
4. In the Tools Menu (or Entry Tools Menu) drop-down list, which is located on the page just to the right of the toolbar, choose the **Delete** menu item.

Forum then displays the "Delete items from..." page. On this page, Forum displays a select box of all of the entries that you have created.

5. In the "Entries" (or "Entries/Replies") box, click (or Ctrl click for multiple selections) on the name of the entry that you want to delete.

   After you click on an entry, Forum highlights the entry's title.

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

   Forum then displays a confirmation form.

7. If the information on the "Confirm Delete Request" page is correct, click on the **OK** button.

Notice that, when Forum deletes an entry, it does not re-use its number. For example, you can delete the last entry in the folder, which is, say, entry number 21. Then, when you create a new entry, Forum gives it the number 22. So, the folder's listing then goes from entry 20 to entry 22.

Receive E-Mail Notifications

1. View the summit page.
2. If you have not logged in already, log in.
3. Click on your hyperlinked name in the welcome message toward the top of the summit page (by default, it's located just under the toolbar).

   Clicking on your hyperlinked name displays your user profile.

4. On the "User Profile for..." page, click on the **Modify** icon, as follows:

   Modify

5. Scroll to the bottom of the "Modify User..." page, and, in the Other Preferences section, view the "Enable mail notification from the following forums" select box.
6. Click on (or Ctrl click for multiple selections) the name of the forum for which you want to receive notifications.
7. After you choose your forum or forums, click on the **OK** button at the bottom of the page.

Forum sends e-mail notifications to you in intervals determined by your administrator (for example, every hour, three times a day, once a day). Also, in order for e-mail notification to work, your summit administrator needs to have set up Forum with the name of an e-mail server. If you do not receive e-mail notifications after a few hours, contact your summit administrator for assistance in solving the problem.)

View Notification Notes

1. View the summit page.

2. Click on the **Forum Tracker** icon, as follows:

3. Click on the **My News** icon in the upper-left corner of the top frame, as follows:

   The My News feature contains links to *notifications*, which are brief notes about recent activity in all of the forums on the summit. The My News feature also allows you to view news articles that are stored on the summit.

   If you do not see a **My News** icon, you need to modify your registration information to include the My News button on your Forum Tracker page. The Modify Registration Information section in this book explains how to modify your registration information (registration information is also called your *user profile*).

4. In the Folders section of the "My News Folders for..." page, click on the **Notifications** hyperlink.
5. To view a notification, click on its hyperlinked title.

When you view a notification, it indicates the nature of the activity (a newly added entry, a modified entry, when the activity took place, and so on). The notification also contains a link to the new or modified document or discussion topic.

View a Count of Newly Added Entries

The *Forum Tracker* provides you with multiple ways of tracking forums and other pages. To view a count of newly added or modified entries in a forum, do the following:

1. View the summit page.
2. Click on the **Forum Tracker** icon in the summit's toolbar, as follows:

3. In the top frame of the Forum Tracker page, click on the Tools menu, and choose the **Select Local Forums to Track** menu item.
4. In the Summit Forums box, click on the forum that you want to "track." (When you track a forum, you see a count of newly added or modified entries.)

   If you want to track more than one forum, click on the name of one of the forums, press and hold the Ctrl button, click on the names of the other forums you want to track, and release the Ctrl button. The names of all of the forums you want to track should be highlighted.

5. Click on the **OK** button at the bottom of the page.
6. The Forum Tracker page now lists the forums you specified, and provides a count of all newly entered or modified entries.

The following is an example of the bottom frame of the Forum Tracker page after you specify two forums to track:

When viewing the Forum Tracker page, you can go to the summit page by clicking on the hyperlinked title of the summit ("Widget Company's Summit"). Or, you can go directly to a forum being tracked by clicking on one of the hyperlinked titles ("Widget Version 3.0 Project Brainstorming" or "Marketing Plans").

If you choose, you can use your web browser to set the Forum Tracker page to be your home page. That way, the first Forum page you see is a summary of the forums that you want to keep track of. (For more information on how to make the Forum Tracker your home page, see your browser's Help system. With most browsers, you view the page you want to be your home page, you choose a "preferences/options" menu item, and you click on a button to make the current page your home page.)

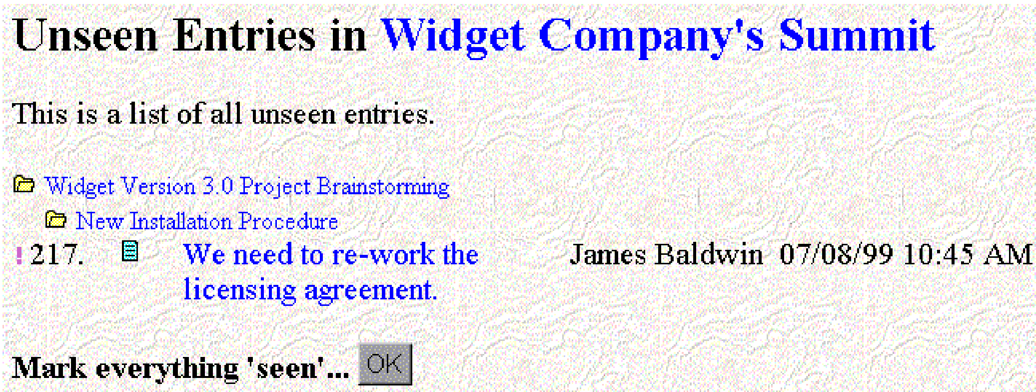
View New or Modified Entries

There are multiple ways to view new or modified entries, and the list in this section presents one way. However, all of the methods use the "Unseen" feature of Forum, which allows you to view unseen (or modified) entries.

1. View your Forum Tracker page.
2. View the Unseen counts for your tracked forums.
3. Click on the title of the forum that has had significant recent activity.

4. In the forum, click on the **List Useen** icon, as follows:

The Forum displays a page such as the following:



Using the hyperlinks on the "Unseen Entries in..." page, you can go to the summit page ("Widget Company's Summit"), to a specific folder page ("New Installation Procedure"), or to the new entry ("We need to re-work the licensing agreement.").

If you decide that it is unnecessary for you to view any more of the new entries, you can click on the **OK** button next to the label "Mark everything 'seen'...."

In the forum, when you view a folder page, all of the new and modified documents and discussion topics include the Unseen symbol to the left of their entry line. The Unseen symbol appears as follows:

!

After you view the entry (or mark or set it "seen"), Forum removes the symbol from the entry's line on the folder page.

There are other ways to view unseen entries, as follows:

- View a notification (in either e-mail or My News), and click on the hyperlink contained in the note to get to the new entry; view only the entries that have meaning to you.
- View a forum, click on the **Next Unseen** icon, and review the oldest entry that you have not yet seen. Repeat this process until you have stepped through each new entry.
- View a forum, scan the folder for the Unseen symbol, read the entry title to see if it interests you, and view the entry. Repeat this process until you have reviewed all the new entries that interest you. When you are finished, use the **Set Seen Entries** item in the Tools menu to remove the Unseen symbol from all the entries you were not interested in viewing.
- View the summit, click on the **List Unseen** icon, and view the unseen entries in all forums on the summit.

Modify Registration Information

1. View the summit.
2. If you have not logged in already, log in.
3. Click on your hyperlinked name in the welcoming message, toward the top of the page (by default, it's located just under the toolbar).
4. On the "User Profile for..." page, click on the **Modify** icon, as follows:

5. Modify user information on the "Modify User..." page, and, when you are finished, click on the OK button at the bottom of the page.

   You can perform tasks such as changing your password, adding a link to your personal home page, adding or subtracting items from your Forum Tracker (a personal Discussion and Document forum, and a personal Calendar), specifying default chat channels, uploading a picture of yourself, and setting user preferences (such as the native language and the toolbar style).

Using the Calendar

This Quick Start section provides a list of the most common tasks that you may need to do when you are a new Calendar user:

What you need to do…	Why you want to do it…
Viewing your personal calendar.	There are *summit* calendars (located on the summit page), *team* calendars (located on the team's pages), and *personal* calendars.
View a day's schedule.	You need to be able to view the appointments scheduled for a given day.
Schedule an appointment.	A common task is adding an appointment to the calendar. Anyone who is allowed to view the calendar can see the newly created appointment.
Create a To Do list item.	You can attach a list of tasks that you want to remember to perform. In this way, you can compare your appointments with individual work goals for that time period.
Merge Calendars.	Instead of viewing multiple calendars, it can be helpful to use your personal calendar to view the appointments from all of the Forum calendars you are tracking. In this way, summit-level and team-level appointments appear alongside your individual appointments within your personal calendar.

Viewing Your Personal Calendar

To view the summit's calendar, view the summit page. To view the team's calendar, view the team's pages. Do the following to view your personal calendar:

1. View the summit page.
2. Click on the **Forum Tracker** icon, as follows:

3. Click on the **Today** icon, as follows:

When you click on this icon, Forum displays your personal calendar.

If you do not see the **Today** icon, then you must modify your registration information to include the personal calendar on your Forum Tracker page. See the Modify Registration Information section of this book for more information.

Calendars are displayed in four frames. The leftmost frame contains toolbar buttons. The top frame contains the Tools Menu, which identifies the calendar with which you are working. The middle frames display a grid of the days of the current month, and, to the right of the grid, a list of appointments for the current day and any current To Do list items. Forum uses the bottom frame for displaying addition information (for example, displaying all of the monthly grids for a year) or for doing work (such as adding an appointment to the calendar).

In the monthly grid, if an item appears in bold and italic type, it contains a scheduled appointment. The current day's number is red.

Viewing a Day's Schedule

By default, when you first view a calendar, you view the appointments for the current day (and any currently listed To Do items). To view the appointments for another day, do the following:

1. View the calendar that contains the scheduled appointments you want to see.
2. In the monthly grid, click on the number for the day whose appointments you want to view.
3. The day's appointments appear in the frame just to the right of the monthly grid.

Schedule an Appointment

To schedule an appointment, do the following:

1. View the calendar that contains the scheduled appointments you want to see.
2. In the Calendar Tools Menu, choose the **Add Appointment** item.

   The Calendar Tools Menu is located in the top frame. Since it is a drop-down menu, click anywhere on the rectangular box, and a list of menu items appears. Scroll down the list, if you need to, and click on the menu item that you want to choose.

   Forum places the Dated Entry form in the bottom-most frame.
3. Fill out the Dated Entry form, and click on the OK button at the bottom of that form when you are finished.

   By default, Forum assumes that you want to schedule the appointment for the date you are currently viewing in your calendar. If you want to make the appointment for another day, be sure to change the values in the Date section, which appears in the upper-left corner of the Dated Entry form.

   At a minimum, you should specify a Date, Time, Meeting Location, and Description. If you choose, you can attach additional information to the appointment. (For example, you can attach meeting minutes or a document that must be reviewed before attending the meeting.)

Create a To Do List Item

To Do list items are reminders of tasks that you want to complete. These items are permanently listed with your appointments regardless of the date. To create a To Do list item, do the following:

1. View the calendar to which you want to add a To Do list item.
2. In the Calendar Tools Menu, choose the **Add ToDo Item** command.
3. In the Bottom frame, type a description of the task you need to accomplish.
4. Click on the **OK** button when you are finished.

Forum adds the To Do list item to all of the daily schedules. The daily schedule frame appears as follows:

October 08, 1999

	Start	End	Description	Location
	09:00	10:00	Review readiness for field test for Widget Version 1.3.	Chadwick Conference Room
☐			Review Widget Specification	
☒	12:17		Reschedule Dentist Appointment	

The “Review readiness for field test for Widget Version 1.3” item is an appointment. The other two items are To Do list items. When you complete a To Do list task, click on the box to the left of the title. When you click on one of these boxes, Forum places an X in the box and dates the item, indicating when you completed the task.

Forum does not delete the To Do list item after you check its box. To remove the To Do list item from the calendar (to delete it), do the following:

1. Click on the title of the To Do list item (in the previous example, you can click on the **Reschedule Dentist Appointment** hyperlink).
2. In the bottom-most frame, click on the **Delete** button.

Forum removes the To Do list item from the calendar.

Merge Calendars

To view summit and team appointments on your personal calendar, do the following:

1. View the summit page.
2. Click on the **Forum Tracker** icon, as follows:

3. Click on the **Today** icon, as follows:

4. In the Tools menu, choose the **Merge Other Calendar Entries (personal view)** menu item.
5. Forum displays a status message in the lower frame, and now displays entries from other calendars on your personal calendar.

Now, when you view a day's schedule, it appears as follows:

October 08, 1999

	Start	End	Description	Location	OtherCalendar
			Heidi working from home.		Our Corporate Calendar
	09:00	10:00	Review readiness for field test for Widget Version 1.3.	Chadwick Conference Room	
☐			Review Widget Specification		
☒	12:17		Reschedule Dentist Appointment		

Notice the "Heidi working from home" entry. It contains a listing under the OtherCalendar column header, and it lists the calendar on which this entry is listed. To go to the other calendar, click on the calendar's name in the OtherCalendar column (in the previous example, the other calendar is called "Our Corporate Calendar").

When you merge entries from other calendars, Forum uses a slightly different font to indicate which days contain entries from which calendars. Numbers for days that contain entries from only the current calendar (your personal calendar) appear only in italic font. Numbers for days that contain entries only from only calendars other than the current one appear only in bold font. Numbers for days that contain entries from both the current calendar and other calendars appear in both bold and italic font.