Best Practices: Discussion Forum Management

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1   Summary

This document describes some user best practices, and setup recommendations when interacting with a client that has set up a forum portlet. This covers the management nuances for setup of our forums. Specifically forums built through the CVS identity management tool.
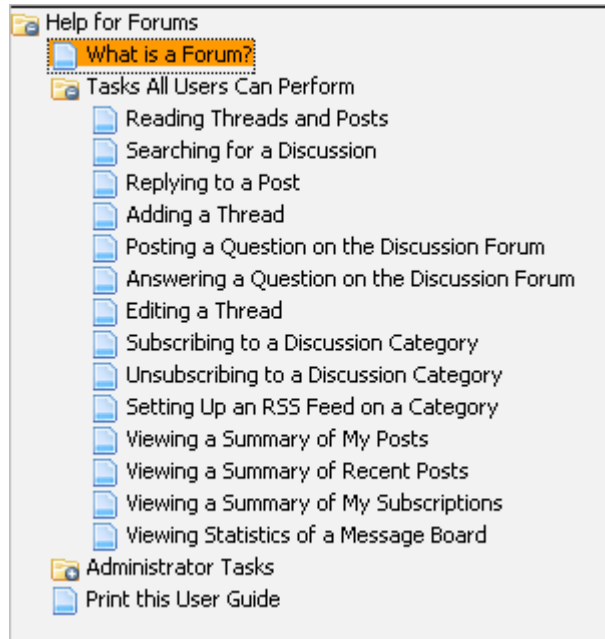
I'm sure you have all seen or used interactive web forums on-line. The Covisint version of forums is like many other open communities on the web. However for your use all of the users of the forum will be logged in members of the site authenticating to the CVS system.

Users while logged into the site can read or post discussion threads or replies to discussions.

2   Help Topics

Start be reviewing these help topics. This will explain how to perform various tasks within a forum. The help pages can be found here – http://www.covisint.com/robohelp/collaborationportal/discussionforum/What_is_the_Forum.htm

And there is a screenshot of this page below. This document will not document these features but it will describe best practices and uses for the items described in this help.

3   Categories

The basis of all posts within a forum is set by category. These topics or subjects called categories are the first thing that users will see when they look at your forum. The most important first step will be to identify several but not too many categories that you think will work well with your community. I would suggest around 7-15 main categories. You can add, rename, or delete categories as needed, however a typical user will **not** have the ability to create a category.

Once you have a list of categories to for your forum set then you will be ready to start posting.

4   Sub - Categories

Sub-categories are categories within a category.

I would avoid setting up sub-categories at first. When you want to the system will support sub-categories. Sub-categories may also have sub-categories within them, and so on.

5   Searching

The current implementation does not support searching. Although it looks there is a search feature, the searches do not currently return any results.

6   Subscribing and RSS Feeds of Categories

When a user subscribes to a category, he or she will get an email whenever a post is added in that category.

If a user generates an RSS feed of a category, he or she can save this feed and view all new activity of a category when using an RSS reader.

7   Questions / Answers

Particular posts can be marked when they are submitted as a regular post, or as a question. When the post is a question, then the post can be answered by a later post.

Although any post can be submitted as an answer to question, it is in fact just another post until an admin user marks the post as an answer to a question by selecting that choice next to the post. All users will not see this "mark as answer" icon.

8   Ratings

The system supports a "thumb" rating system for posts. Any user can (once per post) mark a post with positive or negative feedback.

9   Anonymous Posts

All users will be logged into the system, but the system does have support for anonymous posting. This means that a logged in user, can select an anonymous check box as they are adding a post. This will post the comment without their login information.

We recommend disabling this feature for the entire site as shown in the help section, but the option exists.

10   Permissions

The forum supports granularity of permissions by role. Here are the settings for the 3 typical default templates. One is for a guest, on a user / contributor, the last if for a power user who is the forum administrator.

Permissions are set by category and by role. We recommend that all categories share the same permissions for the same roles.

Role	Add File	Add Message	Add Subcategory	Delete	Move Discussion	Permissions	Reply to Message	Subscribe	Update	Update Discussion Priority	View
Guest											X
User	X	X						X	X		X
Admin	X	X	X	X	X	X	X	X	X	X	X