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# **]project-open[ v3.0**

## **Forum User Guide**

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## 1 About this Document

### 1.1 Version

Version: V1.3.1, 16.8.2005

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### 1.2 Scope

This manual describes the **]project-open[** Forum module that allows groups of people to discuss and manage communications around a specific subject.

### 1.3 Audience

The manual is written for users and project managers.

## 2 About **]project-open[** Forum

**]project-open[** Forum allows groups of people to communicate and share ideas around a specific subject such as for example a project, a customer or a provider. This functionality together with the filestorage module is the base of “virtual project rooms” (e-rooms) and online collaboration in general.

## 3 The “Speech Act” Metaphor

The Forum Module is based on the notion of so called “speech acts”. Speech acts are elements of the human language that capture how we communicate with other persons based on different types of sentences or utterances that we can make. Certain speech acts are mapped to “Topic Types” in **]project-open[**. Each type is designed to support a particular communication model. The following table gives a brief overview about the different types and provides a recommendation on how to use them.

Speech Act	Topic Types	Description
Question	<i>Discussion</i>	A user has a doubt or question and creates a new discussion. The topics treated in a discussion are frequently of interest to a larger number of members.
Command	<i>Tasks</i>	A user with supervisor capabilities (project manager, customer, ...) assigns a task to another user and tracks its execution. The assignee can accept or decline the task and inform about the completion of the task. This item is usually used to manage typical "To-Do" lists.
Help!	<i>Incident</i>	An <i>incident</i> is a kind of <i>task</i> that requires immediate action.
Shout to everybody	<i>News</i>	Use the "News" in order to communicate global information where reading is desirable but not necessary.
Did you know...?	<i>Note</i>	Notes are usually project-specific and can be logged by all users. They can consist for example of information gained that ought be tracked

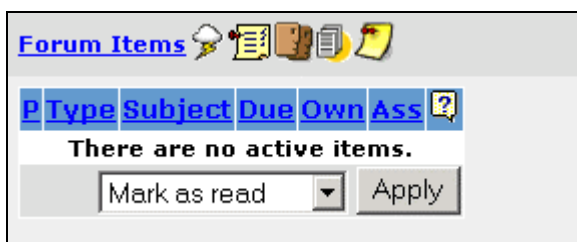
**Table 1: Forum Topic Types**

## 4 My First Forum Topic

### 4.1 Locate a Sample Forum

Like mentioned in the beginning, Forums are associated with business objects such as project, customers, providers, users etc.

To complete the following steps you need to locate a sample Forum. For the sake of brevity, please make sure your are logged into the system as "Senior Manager", go to the "Projects" tab and select the "Itelligent Software L10n" ("2004\_0012") project from the list of projects. You will see an empty Forum (on a demo system, there may already exist some sample items).



**Figure 1: An empty Forum**


Please hold you mouse pointer over the various icons without clicking. A help text will appear for each item:


- Create new Incident
- Create new Task

- Create new Discussion
- Create new News Item
- Create new Note

The exact meaning of all these items is explained later on in this document.


## 4.2 Create a Sample Task

Please create a sample test task in this Forum by pressing the “Create new Task” icon . Enter some sample text as shown in the following dialog and press the submit button.

Topic Type	 Task
Task Subject	<input type="text" value="Test Task"/>
Posted in	<a href="#">Project/Open Installation</a>
Priority	<input type="text" value="5 - Normal"/>
Assign to	<input type="text" value="Frank Bergmann"/>
Due Date	<input type="text" value="November"/> <input type="text" value="2"/> <input type="text" value="2004"/>
Task Body	<input type="text" value="This is a test task, please ignore."/>
Access permissions	<input type="text" value="Project (all project members)"/>
Do you want to receive updates?	<input checked="" type="radio"/> Important Updates <input type="radio"/> All Updates <input type="radio"/> No Updates
Actions	<input type="button" value="Create Task"/> <input type="button" value="Apply"/>

**Figure 2: Creating a "Test Task"**

As a result, “Frank Bergmann” will receive an email notification that he has been assigned to a new task. If “Frank Bergmann” checks the system, he will get the following view to the new item:

Subject:	 Test Task ( <a href="#">Reply</a> ) ( <a href="#">Edit</a> )
Posted in	<a href="#">Project/Open Installation</a>
Posted by:	<a href="#">Frank Bergmann</a>
Status:	Assigned
Posting Date:	2004-11-02
Priority:	5
Assigned to:	<a href="#">Frank Bergmann</a> ( <a href="#">Assign</a> )
Due Date:	2004-11-02
Visible for	All group members
Receive updates	major
This is a test task, please ignore.	
Actions	<input type="button" value="Reply to this Task"/> <input type="button" value="Apply"/>

**Figure 3: A Users View to a Task**

The person to whom the task has been assigned to (Frank Bergmann) now has the following possibilities to respond. Also, the person can add a comment to the task explaining more details.

**Table 2: Task Actions and States**

Action	Meaning
Accept Task	Confirm that this person is going to complete the task
Reject Task	The user rejects to complete the task.
Close Task	Indicates that the task has been successfully completed
Tasks needs clarify	Indicates that the assignee needs some clarification about task details or about the scope of the task.
Reply to this task	Add a reply (comment, question...) to the task
Edit task	This option is only available to the owner (creator) of a task, to Project Managers and to Senior Managers.

Email alerts are sent out to all project members.

### 4.3 Understanding Other Forum topics

In the above example we explained the creation of a “Task” topic. Besides “Tasks” the Forum Module manages furthermore

- Incidents
- Discussions,
- News and
- Notes

The basic structure of these topics is very similar to each other although each of them consists of a different set of attributes. Depending on the topic type they might start back office actions as for example email notifications. In that sense incidents can be regarded similar to tasks. News and Notes usually don’t execute email notifications of any type if not expressively desired.

You will learn more about the different topic types when studying the attributes in the following chapter

## 5 Understanding Attributes

A topic type consists of a combination of attributes. It can be distinguished in between common attributes that are part of all topic types and type specific attributes that are members only of some topics types.

### 5.1 Understanding Topic Attributes

**Attribute: “Subject”:**

Subject is the principle title of topic. Users decide based on the title if the content of the topic is of any use for them or not. It therefore should be chosen in a way that the reader immediately get a clear idea.

**Attribute: “Posted In”:**

Specifies the parent project of this topic. All are related to a project or some other **P/O** business object.

**Attribute: “Posted By”:**

Specifies the owner of this topic.

**Attribute: “Status”:**

Relevant only to tasks and incidents: Show whether the task or incident has been accepted by the assignee or whether it is pending. The task states correspond to the actions in Table 2.

**Attribute: “Posting Date”:**

Shows the generation date of the topic.

**Attribute: “Priority”:**

Indicates the urgency of a task or incident. Priority is represented by a number between 1 and 9 with 1 indicating a very urgent task and 9 indicating the least urgency.

**Attribute: “Assigned to”:**

Tasks and incidents can be assigned to other project members for resolution. This field shows the person who is currently responsible for resolving the task.

**Attribute: “Due Date”:**

Shows the deadline for the resolution of a task or incident. Tasks that are not “resolved” after the deadline are rendered in red.

**Attribute: “Visible for”:**

Specifies the access permission for this topic. Please see the section “Understanding Permissions” below for more details.

**Attribute: “Receive updates?”:**

This attribute allows you to specify whether you want to receive email alerts for this topic. You can choose between the following types.

- **All:** Receive email notification about all changes to the topic.

- **Important updates:** Only important modification are communicated, such as closing or canceling a task or incident..
- **No updates:** You don't want to receive any notifications about this topic.

**Attribute: "Body":**

The "Body" element contains the main message text. It can hold up to 4000 characters.

**Attribute: "Action":**

Show the available actions for the given topic.

## 6 Understanding Notifications

Notifications are emails that are sent to project members when a forum item is modified. This allows for active discussions that are very similar to an email mailing list, but that leave a track record saved on the system for reference

- All project members become "subscribed" when somebody creates a new forum item (depending on your permissions, as explained in the next chapter)
- All subscribed members receive email updates if a forum item is modified

However, every project member can determine how many updates they will receive about a forum item. The "receive updates" status is shown when viewing a forum item (see figure 3 above) and can be modified when editing a forum item. There are the following options:

- All Updates:  
You will receive email updates for all modifications of the forum item
- No Updates
- Important Updates:  
Important updates limit the email notifications to important changes. Important changes are: Closing an item, marking a task or incident as "resolved". Replies to the initial forum topic or resignations of a task or incident are not important.

In the future, **project-open** will support the option to group several notifications into a single email message ("Bulletins").

## 7 Understanding Permissions

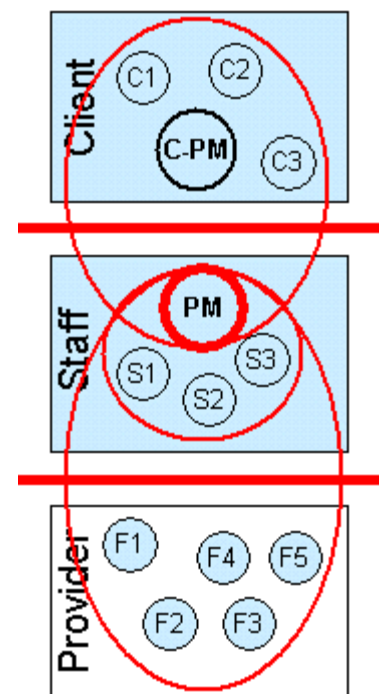
Forum permissions are built around a metaphor of three different "communication spheres" in a project:

- Clients
- Company Staff and
- Providers/Freelancers

This model resembles the situation that a company had to recur to external providers in order to execute a specific project. However, the client shouldn't necessarily notice that there are external persons involved.

The Forum Module approach to this situation is to introduce permissions for each Forum topic. One specific topic can have the permission levels:

- **Project Manager:** This is the most restricted permission. This topic is only visible to the project manager (apart from the owner who created this topic).





- **Staff:** This topic is only visible for in-house staff.
- **Staff and Providers:** This topic is visible for everybody but clients.
- **Clients and PM:** This topic is only visible in the clients sphere.
- **Everybody in the Project:** This topic is visible to all three communication spheres
- **Public:** Everybody in the system. This permission is for company wide news or incidents.

However, not everybody in the system has the right to create topics with all of these permission levels. The system administrator defines these permissions. The table below shows a typical default configuration:

	<b>Project Manager</b>	<b>Staff</b>	<b>Staff and Providers</b>	<b>Clients and PM</b>	<b>Whole Project</b>	<b>Public</b>
<b>Customers</b>	X			X		
<b>Freelancer</b>	X		X			
<b>Employees</b>	X	X	X			
<b>Project Managers</b>	X	X	X	X		
<b>Senior Managers</b>	X	X	X	X	X	
<b>System Admins</b>	X	X	X	X	X	X

This means that customers by default can only communicate amongst themselves and the Project Manager. However, they can't communicate with the freelancers who are working in the same project.

Freelancers or Providers on the other hand can communicate amongst themselves and with staff members. However, they have no way to get into contact with customers.

In the middle of these communication spheres is the Project Manager who can see all communication. The PM can act as a bridge between Clients and Providers and route communication amongst them as we will see in the next chapters.

## 7.1 Permission rules for Incidents

All registered users are possesses the right to post incidents, although freelancers and costumers are not able to assign incidents to any another person then to the PM. Neither are they are allowed to define "Access Permissions". An incident logged by a costumer or a freelancer is by default pre-assigned to the PM. The PM can then re-assign the item to a suitable.

## 8 Organizing Forum Topics

### 8.1 Normal Forums

Like initially mentioned, Forums are usually associated with different business objects in ]po[. In a standard installation Forums can be associated to the following objects:

- Projects
- Companies (Customers, Providers, Partners, ...)
- Offices
- Users (Freelancers, Customer contacts, ...)

All forum items appear in the forum where they have been created.

### ***8.2 The "Home Forum"***

However, there is one exception, the

- Home Forum (at the "Home" page)

The "Home Forum" acts like a kind of "inbox". All unread items from all other forums appear here. Once an item has been read it will not be shown anymore in this list.

### ***8.3 The "Forum Main Page"***

Finally, there is the "Forum main page" that you can access via the "Forum" tab in the main menu. This page shows you the list of all forum items of all projects (or business object).

Also, there are two submenus for

- Deleted Items and
- Unresolved Items



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