



# 4

## Constructing Your WebBoard Site

**C**hapter 3, *Installing WebBoard*, walked you through installing WebBoard and taking a test drive to be sure the core components were up and working. Now you want to begin using your new software, but you may not be sure what to do first. This chapter provides an overview of the steps you'll go through in building your site, alerting you to the numerous WebBoard features and options so that you can create boards that meet your and your users' needs perfectly. It raises many questions and then directs you to detailed information to help you answer them.

To construct a WebBoard site, you'll want to figure out how many boards you need and be clear on their purpose. What type of security is appropriate? What conferences make up each board? Do you want to get administrative help from board managers and conference moderators? What's the most efficient way to set up user accounts, or can you do without them? Then there are mailing lists, newsgroups, and chat. On which boards would they be appropriate and most enhance the user's experience? Should users have address books to send messages to other users' attention? Do you want user paging?

Aside from content and functionality, you have choices for board appearance. Do you want to change the board scheme to give the board a particular look and feel? Or maybe localize the board for a non-English speaking community? Or add a script or other custom elements to one or more boards? WebBoard gives you a lot of flexibility for creating the best site for your needs.

This chapter starts with a quick summary of the steps involved in building your site and then moves on to look in more detail at those steps. You'll also find information on a few important topics to aid you in determining whether you want to use some WebBoard features.

For information on basic WebBoard configuration issues such as whether to run WebBoard on multiple platforms or how you could benefit from using an external web server as a gateway, see Chapter 2, *Before You Start*.

## Quick Summary of Building Your Site

Here's where to start learning how you, as WebBoard administrator, will build your WebBoard site. Read through the steps quickly and then, after you've gotten the lay of the land, begin completing the tasks. You'll find yourself referring to subsequent chapters for conceptual material and procedures as you go along. Those chapters take you through the details of site administration, board management, conference management, user management, managing chat, and customizing WebBoard. This chapter gives you the overall view.

### Step 1: Make a Plan

You probably had some specific goals in mind when you decided to use WebBoard. For example:

- You want to design a conferencing system that enables small workgroups in your company to plan and execute projects efficiently while at the same time enhancing overall company communication.
- Your university wants to provide each faculty member with a board to serve as a communication center for course work, student questions, virtual office hours, and extra resources.
- As an ISP, you're ready to offer your clients the option of a conferencing and chat system.

WebBoard has enough features to handle all of those scenarios and more. Doing some up-front planning in how to structure your site and learning which WebBoard features are designed for your particular needs can save you time down the road when you're working at the detail level.

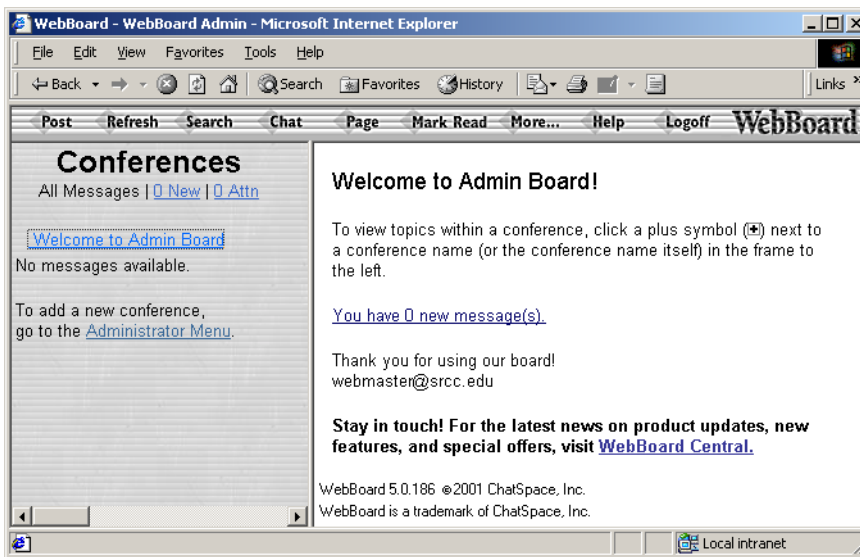
Start by making a list of the boards you envision. Remember that boards are collections of conferences, and each conference contains sets of threaded messages. Next to each board put down a few words describing the board's purpose; for example, customer Q&A for tech support, communication center for faculty members, or board for sales department to use as they want. Next, think about which WebBoard feature would facilitate those goals. For example, chat

might be suitable for a communication center but is probably not necessary for a resource center. Do you want the boards to be private or open to the public? Review Chapter 1, *Why Conference on the Web?*, if you need a reminder of WebBoard's features. Don't worry about getting everything exactly right the first time. WebBoard makes it easy to change most board settings later.

## Step 2: Start at the *admin* Board

Once you have a site plan sketched out, you're ready to start creating boards and conferences. During installation, WebBoard created your WebBoard site and one board on that site—the *admin* board (see Figure 4-1), which uses the WebBoard frames interface. It also created one user account on your site—the administrator account with the login name and password you entered during installation. Go to the *admin* board and log in. This is the administrative center for your site. From here you create boards. Many WebBoard administrators also use this board as a communication center for the board managers and conference moderators that you add later to help you run your site.

**Figure 4-1** The admin board



To go to the *admin* board, follow these steps:

1. Make sure WebBoard is running, as described in Chapter 3.
2. Point your browser at the board's URL, typically, *http://your.site.com/~admin*.
  - Include the port number if necessary after the domain name (*http://your.site.com:8080/~admin*).

- If you are using an external web server exclusively, enter the correct URL for the type of server: *http://website.server.name/wbpx.isa/~admin* for WebSite Pro or *http://iis.server.name/scripts/wbpx.dll/~admin* for IIS.
  - Administrative tools are available only via the frames interface, not the ASP interface or no-frame interface.
3. At the login page, enter the name and password you chose during installation. The last page of the Setup Wizard gave this information.

You arrive at the *admin* board, as shown in Figure 4-1. Here, your first task is to create the boards you planned for the site.

## Step 3: Create the Boards

Open the Administrator menu by clicking the link in the left frame (if no conferences exist), or click More in the menubar and then click Administrator in the More Options menu. You'll see the Add Board link, which opens the Add Board page. On this page you name the board and determine what type of authentication and security system you want for the board and choose whether to make certain features, such as chat, paging, or attention messages, available to the conferences. You can also configure a board that uses the frames interface to respond to a specific host name rather than the WebBoard server name and a board alias—this is the Host Master feature, which is new in WebBoard 5.

Check your site plan to see what boards you want and begin adding them as described in Chapter 6, *Managing Boards*.

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### Note

To use the ASP interface for one or more boards on your site, you will have to do some additional setup in your web server's configuration to set up the ASP pages and components. Otherwise, ASP boards are administered from the standard WebBoard frames interface.

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## Step 4: Choose Board Managers

Only WebBoard administrators can create boards. As a WebBoard administrator, you have the privileges required to manage any board. However, you don't have to be responsible for the daily management of every board. In some cases, such as for ISPs, it may be inappropriate for you to do so. After the board is created, you can specify one or more board managers, as described in Chapter 6. However, you can't choose anyone who doesn't have a user account on WebBoard, so you may need to add the users you want to be managers, as described in Chapter 8, *Managing Users*.

## Step 5: Add Users to Closed Boards

By default, boards you create are open to the public. Users can participate as guests or self-register to have full privileges. You can set the security level to closed; a closed board is one not open to the public. You tell WebBoard who can enter the board, and only those users are allowed in. You can let the board manager, if one exists, take on this task, or you can do it yourself. If users are members of any board on your site, they already have a user account and you can easily add them to the closed board, as described in Chapter 6. Otherwise, you must first create a user account and then add it to the board. For details on adding users to closed boards, see Chapter 8. Alternatively, you could leave the board open until all the board members have registered themselves, and then change the security to closed by editing the board.

## Step 6: Create Conferences

Now you have the boards you want on your site, you have chosen board managers, and you have added users to closed boards. The next task is adding conferences. This may be your responsibility or may be left for the board manager. Consult your site plan for the list of conferences you made under each board.

With your list of conferences, go to Chapter 7, *Managing Conferences*, and read about conferences and the various options and features available for conferences. This information can help you decide how to set up each conference for optimum results. For example, would privacy be appropriate? Do you want to allow email or newsgroup participation or set up a chat room? Will this conference allow file attachments. If yes, how do you want uploaded images to display? As with choosing board settings, you can change things later. But changes sometimes disrupt participation (especially if you take away a feature), so it's worth a little up-front planning.

When you're ready to add the conferences, you log in to the board that you want to add conferences to. Keep this in mind: for almost all board management tasks, you must be logged in to the board you want to manage. You can easily move from board to board via the List Boards link on the More Options menu (click More on the menubar).

Each conference has its own home page, which displays when the user clicks the conference name in the tree. This page includes information about the conference such as the chat room name, mailing list name and newsgroup name. It also may include a link to recent chat transcripts or file attachments in the conference. You can modify this home page on a conference-by-conference basis to provide useful information to your users.

## Step 7: Add Conference Moderators

As WebBoard administrator you can manage conferences, or you can assign a conference moderator to handle many of the daily tasks of keeping a conference on track, including verifying and managing messages. Chapter 7 gives steps for adding moderators; moderator responsibilities are discussed in Chapter 8.

## Step 8: Add Private Conference Members

If you created any private conferences in Step 6, you need to specify which users are members of the conference. WebBoard administrators or board managers can perform this step, which is described in Chapter 7.

## Step 9: Customize the Boards

You've got all the boards ready to go, conferences waiting for messages, but you want to make some changes to how the boards look. WebBoard gives you many choices for customizing what your users see and how they work with WebBoard. If you have the WebBoard ASP interface installed, you can permit access to WebBoard via any web server that supports Active Server Pages. The ASP interface provides a set of programmable objects for easy integration into your current site. The WebBoard ASP interface is installed with a set of default pages; for more information on this new interface, see the ASP item in the WebBoard program folder on the Start menu.

If you are using WebBoard's frames interface, you can easily change board appearance by applying a new scheme. Schemes affect the overall design of the board, including colors and images. You can use one of WebBoard's standard schemes or create your own schemes. Or, if you want to simply change the colors, use WebBoard's color selector. Chapter 6 describes changing board appearance through schemes and the color selector.

Those familiar with HTML can make changes to the text and images that appear on WebBoard pages; for example, rewriting the welcome page and adding the company's logo to the login page of the frames interface. You do this by customizing the HTML files that comprise the various web pages a user sees when visiting your board. Customizations can be made on a site-wide basis, so all boards are affected, or you can customize a single board. Chapter 11, *Customizing WebBoard Pages*, has guidelines on customizing HTML pages through editing the HTML and using special WebBoard tags and URLs. Chapter 12, *WebBoard File Reference*, is a reference for the HTML files.

Customization needn't stop with appearance. Using WebBoard's Open Scripting feature for the frames interface, you can customize user authentication, preprocess data from several WebBoard forms, run scripts from the HTML pages, and

more. Sample scripts illustrate the many uses for scripting and provide a template for you to create your own custom scripts. Chapter 10, *WebBoard Open Scripting*, explains the scripting process. For the ASP interface, you can integrate and manipulate the WebBoard ASP components as desired for your site.

Other customization options include foreign language translation of system messages stored in the *language.ini* file and adding text files to HTML pages with the <WB-INCLUDE> tag. Five optional memo fields on the new user and user profile forms let you collect custom information from your users. Chapter 11 discusses these customization features.

## Step 10: Get People to Your Site

Once the boards are ready, it's like waiting for the first guests to arrive at a long-anticipated event. Put a link on your site's home page or give the URL to those you want to visit the site. Send an email with a link to the board to people you want to participate. For example, if you've just created a board for a project work team, use the team mailing list to notify the team members. Educational institutions with online registration can place a link to the school's boards on the registration page. In some cases, it may be appropriate to purchase or trade for promotional space on other commercial sites.

## Why Use Mailing Lists or Newsgroups?

A user's first—and most typical—exposure to WebBoard is through a browser, whether the board uses the ASP interface or the standard frames interface. The web-based interface is the richest and provides access to the most WebBoard features for your users. Why would they ever want to give up an interface that conveys so much?

When users come to your board via their browsers, you are essentially waiting for them to visit. Sometimes, despite their best intentions, those users forget to visit. Or they don't come often enough to keep discussions moving. Sometimes this is not an issue. For example, if you are offering technical support on your board, the user is motivated to visit when a problem arises. Once your customers know the board is there, they will come as necessary.

But if you are using WebBoard to facilitate project development or teach a class, it's essential that everyone keep up with the postings and participate regularly, sometimes even on an hourly basis. In situations where you are depending on the board to disseminate information and facilitate strategizing, problem-solving, or task distribution, you may not want to count on everyone remembering to check the board several times a day. In these situations, WebBoard's mailing list support keeps the discussion moving and the information flowing.

Basically, WebBoard sends an email of each posted message to users subscribed to the conference's mailing list. If the message had a file attachment, a link is included that allows the recipient to download the attachment. Most users are accustomed to email, and checking it is second nature. Furthermore, your users can post messages by email, either as responses to a previous post or as a new thread of conversation. Teams working together really come to depend on each other's support, even when working at a distance.

Users can subscribe themselves to mailing lists or WebBoard administrators and board managers can do it for them (they can later unsubscribe). For example, you could sign up the faculty hiring committee members so you know everyone receives the latest postings from the faculty recruitment board. Mailing list support is not always appropriate, but it can greatly enhance WebBoard's conferencing in the right setting.

Enabling newsgroup support for a conference allows users who are familiar with news readers to read and post conference messages through a familiar interface. For users who can't remain connected and participate via a browser, newsgroups may be preferred over mailing lists because the user can view the thread of messages, following a topic from start to finish if so desired, something not possible with mailing lists. Messages sent through WebBoard's news server include all file attachments.

## When to Use Chat

Chat lets users communicate in real time with other WebBoard users by typing messages in the chat room window. Users can exchange information, questions, issues, and concerns quickly, as a group, and without regard to time or distance. WebBoard's chat is enabled on a per-board basis, and then configured on a per conference basis, so each conference can have its own (or no) chat room. Why would you want to enable chat? Here are some examples for using chat:

- Tech-support staff can use chat to discuss customer issues with other techs while continuing to work with a customer on the phone. If necessary, a developer or marketing person can join the chat room to provide specific input.
- Impromptu or scheduled meetings among colleagues working on a project.
- Offsite employees can benefit from the online connectivity and interactivity that chat provides, creating a greater sense of community.
- Scheduled chat sessions can feature well-known personalities that attract participants to the chat and the overall site. For example, you might want to feature a local politician right before an election. Or you might want to set up a developers' chat session with some of your product's key engineers and preferred customers. Musicians and actors are also good chat stars.

- Support group members can benefit from the real-time input they get from others in the group.
- Students can talk with one another to learn more about assignments, lectures, research projects, or extracurricular activities.
- Civic groups can carry on real-time discussions about current issues.

Users often request chat because it provides a way to feel closer and talk things through faster than email. However, if you need to moderate all communication on a site, you may not want to enable chat.

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**Note**

Upgraders from WebBoard 4 can continue to use the JavaScript chat included in earlier versions of WebBoard. Users new to WebBoard 5 will not have access to this old-style chat.

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## Would Paging Enhance the Board?

The paging feature lets users send messages directly to other logged-in users. The page appears as a message on the user's screen the next time he or she sends a request to WebBoard (by clicking a link or posting a message, for example). Paging adds to community boards by helping people get in touch with each other. In situations where a user may want to invite another user to join a chat room, for example, paging is a quick way to do so. On public boards, users often request this feature. Since anyone who doesn't want to be interrupted by a page can turn off paging, you may choose to enable paging on the board to satisfy those who really want it.

## When to Enable File and Picture Attachments

In conferences that permit file attachments, a user posting a message can attach a file, which is uploaded to WebBoard's *Upload* folder, and available via a link in the posted (or emailed) message. Files are included directly in messages sent to newsreaders.

If a file is an image, WebBoard can display it in the message body—a great way for conference participants to share digital images of family, activities, or mockups of new products. You can set how images are displayed, whether full-size, a fixed size, or as thumbnails. Non-image file attachments work well for posting material to review or distribute to other users.

As administrator, you can allow or not allow file attachments and also limit the number and size of attachments on a per conference basis. You may want to avoid file attachments because the work involved in viewing the contents could be more

than you want to take on. Malicious users might upload offensive files. Or users could distribute pirated software through your board. Also, uploaded files can spread viruses if you don't scan them regularly. However, file and picture attachments add richness to a conference, so consider both sides before deciding.

## How to Use the *admin* Board

During new installations WebBoard automatically creates the *admin* board. Without at least one board, you wouldn't be able to get to the Administration menu, which lets you add boards, conferences, and so on. Although it may be tempting to use the *admin* board for your first public board, we recommend that you keep it exclusively for administering your WebBoard site.

Of course, when managing a particular board, you will be logged in to that board, so you won't be performing all administrative tasks from the *admin* board. However, by reserving *admin* for site management, you can store administrative records, keep track of management tasks, and provide communication between yourself as site administrator, other administrators, and the board and conference managers. A manager can post about a problem she's experiencing on a board, and others can respond with troubleshooting ideas or solutions they've used. You can post messages to your managers; for example, news of scheduled downtime or proposed upgrades to the chat software.

In using the *admin* board as a centralized administrative center, you will probably want to make it a closed board so only authorized users can enter. You may also want to be sure mailing lists are enabled and encourage everyone to sign up for the conference where you post announcements about the site. This way you'll be sure everyone gets the news.

## Using WebBoard's Administrator Help System

WebBoard has an online help system for administrators that provides information on site, board, conference, and user management. Administrator help is always available from the WebBoard menubar Help button; it appears as a link in the table of contents for the main WebBoard help. The link is named according to the level of administrative privileges assigned the logged-in user and provides access to information appropriate to that level. For example, a board manager sees a link for Manager in the Help table of contents. Help is also available from the various administrative forms used in configuring WebBoard and creating boards and conferences. Any time you see a Help button on a form, clicking the button will take you to information about that area of the form.