

*Portal Prodigy*<sup>™</sup>  
**Discussions Feature in Detail**

Chapter Excerpt from Software User & Administration Guide

January 2007 Update

[www.portalprodigy.com](http://www.portalprodigy.com)

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## 1.1 Introduction

Website visitors post messages and comments, others follow up with replies. Replies can be followed up with further replies forming threads of conversation. Discussion Forums can be public or private and are generally formed around specific interests, groups or subjects. This feature provides visitors the ability to interact with each other or with specified groups. Includes searchable archives making this feature ideal for propagating user self-help groups. Powerful hyperlink insert tool makes this a serious community builder.

Press release benefits include:

- Permits discussions to be public or private.
- Permitted users can open as many on-line discussions as desired from anywhere, anytime.
- Discussions can be organized by topic.
- Permanently archives and becomes part of the organization's knowledgebase.
- Discussion archives may be searched and sorted by words or phrases. Conversation threads may be followed from matching records.
- Hyperlink insert tool allows discussion participants to redirect others to specific resources on the internet.

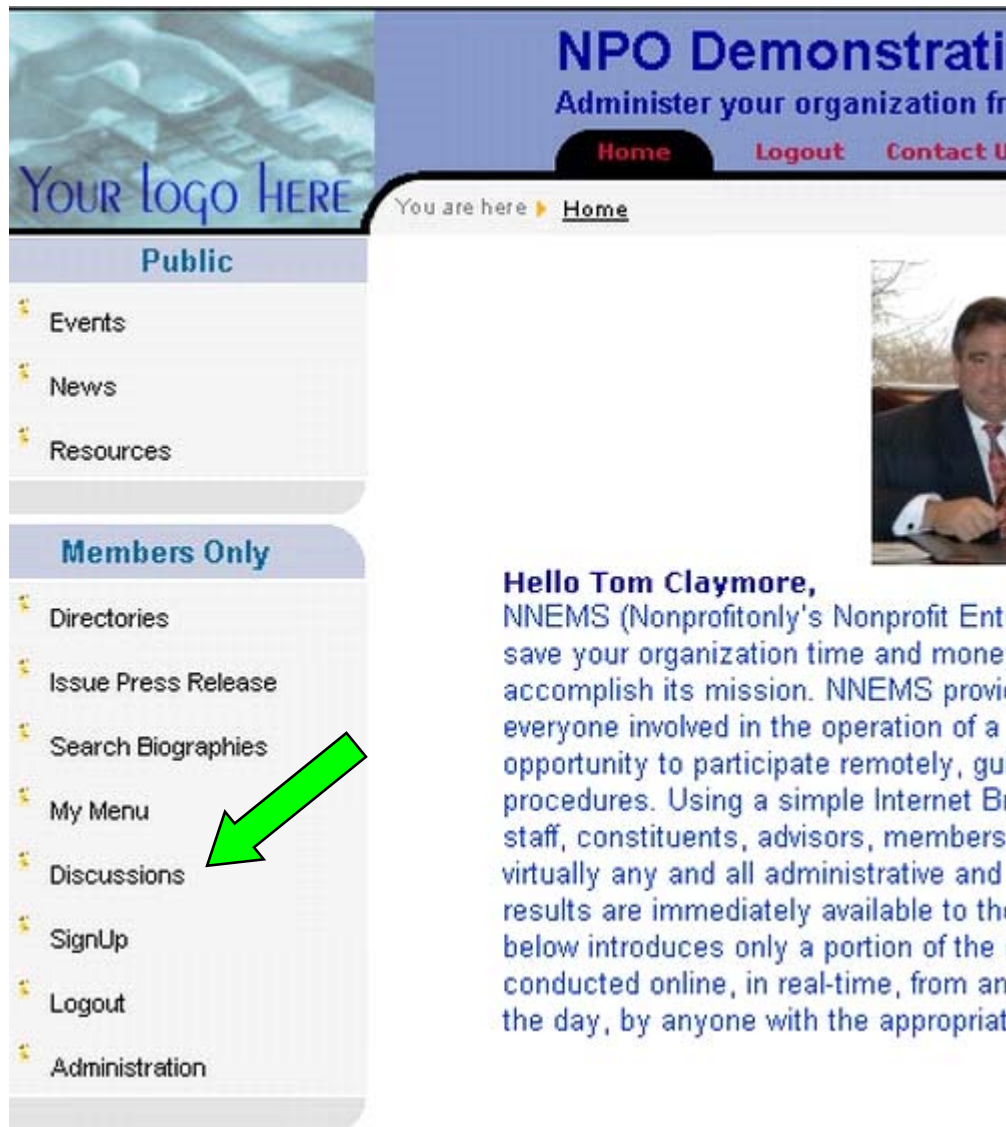
Some of the components, fields and settings of the Discussion Forums feature, discussed in detail in this chapter, are:

<b>Discussion Topics</b>	Expires Date Field
<b>Discussion Management</b>	Chapter ID Field
<b>Pages</b>	Level Field
Discussion ID Field	Topic Field
Title Field	Private Field
Created Date Range Fields	Discussion Replies Link
Last Modified Date Range Fields	
Topics Field	
Items Per Page Field	
<b>Discussion Page</b>	
Title	
Text	
Replies	
<b>Found Discussions Page</b>	
Title Field -	
Discussion Text Field	
Created By Field	
Modified By Field	
Active Field	

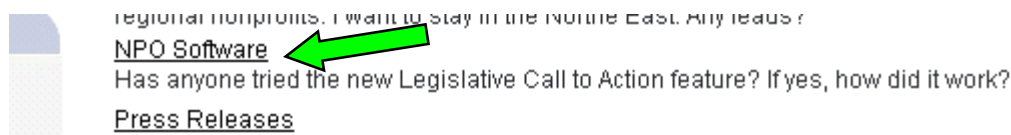
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## 1.2 The Visitor Experience

NEMMS provides Administration with a facility to activate public or private forums. If activated, visitors can select the *Discussions* option from the site menu.



The visitor may select a specific existing discussion topic to view the ongoing dialog.



The visitor can view the entire dialog and choose to reply to the discussion topic or to one of the subordinate replies by simply clicking on a  [Reply](#) button



The screenshot shows a web browser window with a discussion forum. At the top, a breadcrumb trail reads "You are here > Home". The main heading is "Discussion Topic:" followed by "NPO Software". The topic text asks: "Has anyone tried the new Legislative Call to Action feature? If yes, how did it work?". Below this, the post is attributed to "Stephen Reuning" on "7/1/2003 11:25:47 AM" with a "Reply" button. A section titled "Replies (3)" follows. The first reply is from "Mark Gold" on "7/1/2003 11:53:17 AM", stating they used the feature to address an Arts Funding bill. The second reply is from "Dana Pallack" on "7/1/2003 12:03:56 PM", thanking the user. The third reply is from "Bill Bailey" on "7/1/2003 11:58:00 AM", mentioning they didn't see the notice but handled a call from the Governor's Aide. At the bottom of the forum area, there are links for "Top of Page", "Print", and "New Discussion".

Entering a reply is simple. Type the response and click on the  [Done](#) button.

Home Logout Contact Us About Us

You are here > Home

### Reply to Discussion

**In reply to**

We used it to address the recent Arts Funding bill that the Governor's Office was pushing. We got enough constituent response to stall the bill and get some of our items added. It was an amazingly fast method. Definately more economical than the telephone banks we used in the past. And, we got more response per constituent prospected!!

Comments

Perhaps we should do a call to action on the Federal legislation relating to the Arts endowment. Who should I contact about this?

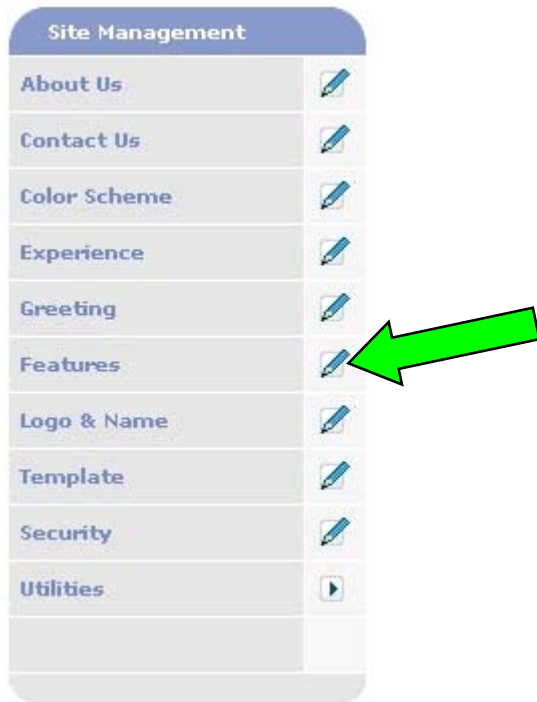
Cancel Done

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## 1.3 Components

### 1.3.1 Discussion Topics

The Discussion Features Management is accessed by clicking the Features link on the Site Administration Menu.



Clicking the check box activates the Discussions feature.

## Features Management

Features		
<input type="checkbox"/>	<a href="#">Advertising</a>	<a href="#">Companies</a>
<input checked="" type="checkbox"/>	<a href="#">Broadcasting</a>	<a href="#">Help</a>
<input checked="" type="checkbox"/>	<a href="#">Discussions</a>	<a href="#">GL Features</a>
<input checked="" type="checkbox"/>	<a href="#">Documents</a>	<a href="#">Orders</a>
<input checked="" type="checkbox"/>	<a href="#">Donations</a>	<a href="#">Payments</a>
<input type="checkbox"/>	<a href="#">Endorsements</a>	<a href="#">Reporting Classes</a>
<input checked="" type="checkbox"/>	<a href="#">Events</a>	<a href="#">Menu Builder</a>
<input checked="" type="checkbox"/>	<a href="#">Exchanges</a>	<a href="#">Mini Browsers Builder</a>
<input type="checkbox"/>	<a href="#">Experience</a>	<a href="#">UserSignUp</a>

Clicking on the [Discussions](#) link accesses the Topics Management Page.

**Discussions Features Management**

Discussion Features

Add Discussion Topics? ☒ Yes ☐ No

[Topics](#)

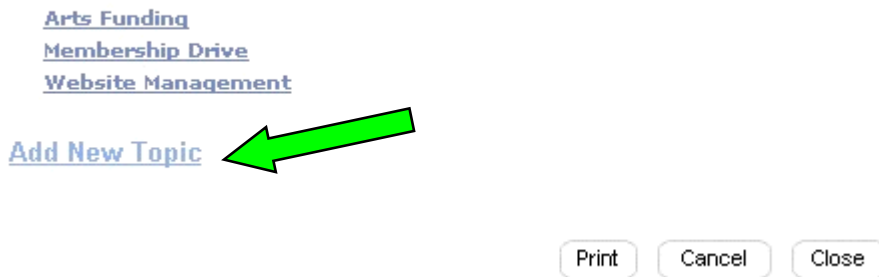


Clicking on the [Topics](#) link accesses the Topics update page where discussion topic categories may be viewed. Click on a topic to update it. Click on [Add New Topic](#) to add more topics.

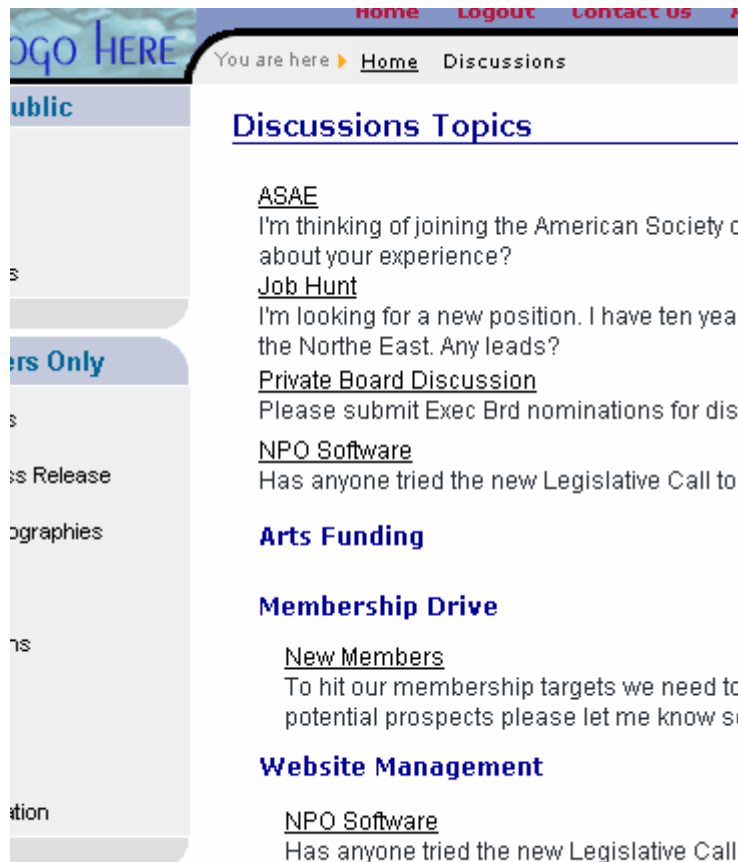
### Discussions Topics Management

[Arts Funding](#)  
[Membership Drive](#)  
[Website Management](#)

[Add New Topic](#)



Discussions can be started within Topic categories and display to visitors under the assigned Topic. Discussions which are not assigned to a topic are listed first.



### 1.3.2 Discussion Management Pages

The Administrator's Discussion Management page is accessed from the Site Administration Menu

by clicking on Discussions Search Icon .



Activates the Add a New Discussion function.

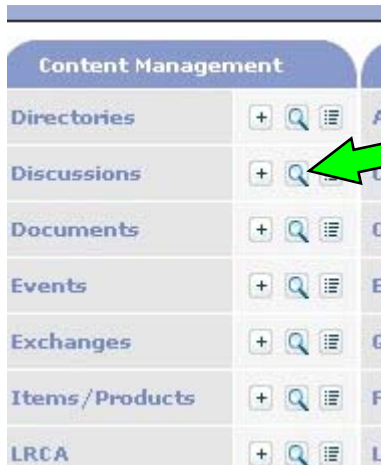



Accesses the Discussion Search page.



Activates the Reports Menu.





All discussions can be displayed by clicking the  button on the *Search For Discussions* page. Or, criteria may be entered into appropriate fields to search for specific discussions.

**Search For Discussions**

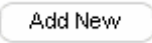
Search Criteria

☐ Include deactivated records in search results

Discussion ID:	<input type="text"/>	Title:	<input type="text"/>
Created Date Range:	<input type="text"/> to <input type="text"/>	Modified Date Range:	<input type="text"/> to <input type="text"/>
Topic:	<input type="text" value="All Topics"/>		
			Items Per Page: <input type="text" value="10"/>

Quick Search on Discussion Title:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

 Add New


Accesses the Discussion Management page which is used to start a new discussion.

 Clear

Clears the search fields of data.

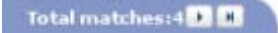
 Print

Prints the contents of the browser window using the printer connected to the visitor's computer.

 Main Menu

Returns the Site Administration Page.

- **Discussion ID Field** - Each discussion is assigned a unique ID number in the database.

- **Title Field** - The title of the discussion is entered when the discussion is created. Permitted public visitors can create a discussion from the public portion of the website but they cannot edit the discussion record once its been submitted. Discussions and replies can only be edited and deleted by a permitted administrator from the Administration pages.
- **Created Date Range Fields** - The Created Date Field is an autofill field. By entering a date in the first Created Date Range field and entering a later date in the second Created Date Range field, one can search for Discussions with Created Dates within the range.
- **Last Modified Date Range Fields** - The Last Modified Date Field is an autofill field. By entering a date in the first Last Modified Date Range field and entering a later date in the second Last Modified Date Range field, one can search for Discussions with Last Modified Dates within the range.
- **Topics Field** - The Topics Field contains a selection list based on entries made on the Discussion Topics Management pages. Topics determines which discussions are grouped together.
- **Items Per Page Field** - The Items Per Page Field defines the total number of rows of matches that will be displayed in the results window. If the total number of matches exceeds the total defined number of rows then the visitor will need to click the page forward button  located at the top of the results window to see more of the matches.

### Found Discussions Page

Found Discussions		
Page 1 of 1		Total matches: 6
ID	Discussion Title	
3	<a href="#">ASAE</a>	
4	<a href="#">Job Hunt</a>	
6	<a href="#">New Members</a>	
1	<a href="#">NPO Software</a>	
2	<a href="#">Press Releases</a>	
5	<a href="#">Private Board Discussion</a>	

Discussion search results are displayed in a list on the Found Discussions page. Clicking on a Discussion's title retrieves that discussion's management page.

### Discussion Management

**Description**

**Discussion Title:** ASAE

**Discussion Text:** I'm thinking of joining the American Society of Association Executives. If you are a member of ASAE could you tell me about your experience?

**Record**

<b>Created By:</b>	Anita Giagrande	07/01/2003
<b>Modified By:</b>	Anita Giagrande	07/01/2003
<b>Active:</b>	Yes	
<b>Expires Date:</b>		
<b>ChapterID:</b>	1	
<b>Topic, Level:</b>	None	All Levels
<b>Private:</b>	No	

[Discussion Replies](#)

- **Title Field** - The title of the discussion is entered when the discussion is created. Permitted public visitors can create a discussion from the public portion of the website but they cannot edit the discussion record once its been submitted. Discussions and replies can only be edited and deleted by a permitted administrator from the Administration pages.
- **Discussion Text Field** - The Discussion Text field holds the message text.
- **Created By Field** - Indicates who entered the record
- **Modified By Field** - Indicates who last modified the record.
- **Active Field** - The Active Field can be set to Yes or No. When set to No, the discussion will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered from display.

**Search For Discussions**

Search Criteria	
Include deactivated records in search results <input checked="" type="checkbox"/>	
Discussion ID:	<input type="text"/>
Created Date Range:	<input type="text"/> to <input type="text"/>
Title:	<input type="text"/>
Modified Date Range:	<input type="text"/>

- **Expires Date Field** - The Expires Date Field provide for the input of a date, after which the discussion will no longer be displayed on the visitor (public) portion of the website. It does not delete the record but tags the record so it will be filtered from display.
- **Chapter ID Field** - Indicates the chapter of the user who entered the discussion record. This field is applicable on multi-chapter versions of PORTALPRODIGY.
- **Level Field** - The Level Field is applicable to multi-chapter synchronous installations of PORTALPRODIGY where levels, such as National, Regional, State and Local are used to filter the display of records.
- **Topic Field** - The Topics Field contains a selection list based on entries made on the Discussion Topics Management pages. Topics determines which discussions are grouped together.
- **Private Field** - The Private Field can be set to *Yes* or *No*. Selecting *No* indicates that the discussion record may be displayed to all visitors. Selecting *YES* indicates that only visitors with appropriate privileges may view the discussion record and causes the Security Groups selection box to be displayed at the bottom of the Discussion Management page. Clicking to check the corresponding check box(es) permits specified group members to view the discussion record on the public portion of the website.

Security Groups	
<input checked="" type="checkbox"/>	Admin
<input type="checkbox"/>	Employee
<input type="checkbox"/>	Members
<input type="checkbox"/>	Users
<input type="checkbox"/>	Visitors

- **Discussion Replies Link** - Clicking on the Discussion Replies link displays all the replies related to the discussion. This feature can be used by administrators who wish to review the discussion forums and delete undesirable messages. Each reply is followed by a [Delete](#) link. Clicking on the [Delete](#) link removes the reply record permanently.

The image shows two parts of the 'Discussion Replies' feature. The top part is a form with a 'Private:' checkbox (checked), a 'Discussion Replies' link, and 'Save' and 'Delete' buttons. A green arrow points from the 'Discussion Replies' link to the modal window below. The modal window has a title bar 'Discussion Replies' and a 'Replies' tab. It contains a table with three rows of replies, each with a 'Delete' link. At the bottom of the modal is a 'Close' button.

Discussion Replies	
Replies	
We used it to address the recent Arts Funding bill that the Governor's Office was pushing. We got enough constituent response to stall the bill and get some of our items added. It was an amazingly fast method. Definately more economical than the telephone banks we used in the past. And, we got more response per constituent prospected!!	<a href="#">Delete</a>
I didn't see the notice that went out on the Arts Funding bill but I did handle the call from the Governor's Aide and they thought we had some huge grass roots campaign going. I talked to Helen and she said she spent two hours drafting the notice and potential response content and let the LRCA broadcast do the rest.	<a href="#">Delete</a>
I didn't recieve that. Please make sure I'm on the list for the future. Thanks	<a href="#">Delete</a>

**Save** Saves the data entered into the Discussion Record fields.

**Delete** Deletes the Discussion Record

**Print** Prints the website page to the visitor's local printer.

**Reports** Accesses the Report Menu

**Cancel** Closes the page without saving or updating values.

**Close** Closes the page and prompts the visitor to save the data.

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## 1.4 Feature Administration

Discussions are enabled from Feature Management. Discussion Topics may used to categorize discussions. Discussion Topics are created from Discussion Feature Management.

## 1.5 Tutorials

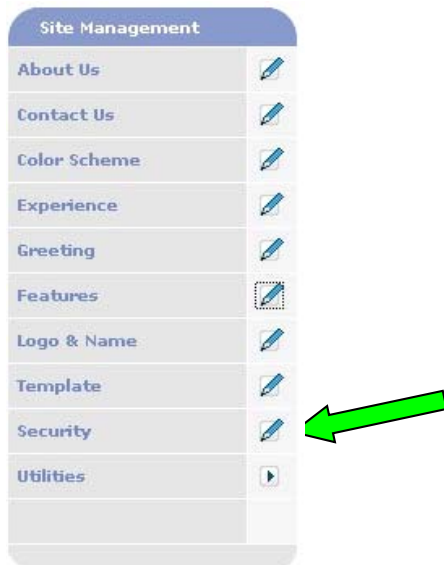
The following tutorials describe how to configure and maintain Discussion Groups.

### 1.5.1 Setup Discussions Parameters in Security Groups

The Administrator should determine which groups will have rights to do each of the following:

- Administer discussions from the private administration portion of the website
- Add discussions from the visitors' portion of the website
- Browse discussions from the visitors' portion of the website
- Reply to discussions from the visitors' portion of the website

Security Groups Management can be accessed from the Site Administration Menu by clicking on the Security icon of the Site Management column.



Each Security Group's Security Group Management Page can be accessed by clicking on the groups label on the Security Groups List page.

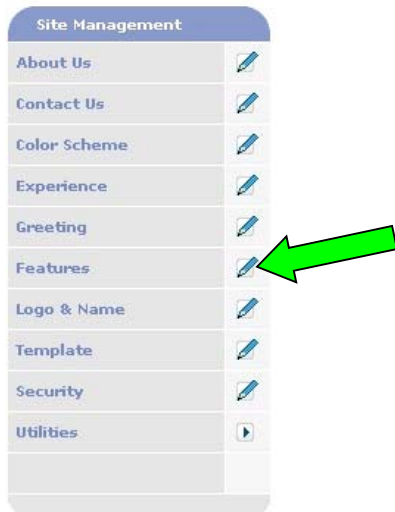


Locate the four variables and set them as desired.

Security Groups			
Resource	No Access	Read Only	Edit
Administration of Discussions	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discussions Add Topics (on Public portion of site)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Discussions Browse (on Public portion of site)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Discussions Reply (on Public portion of site)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

## 1.5.2 Activate Discussions Feature and Add Topics

Discussion Features Management is accessed by clicking the Features link on the Site Administration Menu.



Clicking the check box activates the Discussions feature.

### Features Management

Features	
<input type="checkbox"/> <a href="#">Advertising</a>	<a href="#">Companies</a>
<input checked="" type="checkbox"/> <a href="#">Broadcasting</a>	<a href="#">Help</a>
<input checked="" type="checkbox"/> <a href="#">Discussions</a>	<a href="#">GL Features</a>
<input checked="" type="checkbox"/> <a href="#">Documents</a>	<a href="#">Orders</a>
<input checked="" type="checkbox"/> <a href="#">Donations</a>	<a href="#">Payments</a>
<input type="checkbox"/> <a href="#">Endorsements</a>	<a href="#">Reporting Classes</a>
<input checked="" type="checkbox"/> <a href="#">Events</a>	<a href="#">Menu Builder</a>
<input checked="" type="checkbox"/> <a href="#">Exchanges</a>	<a href="#">Mini Browsers Builder</a>
<input type="checkbox"/> <a href="#">Experience</a>	<a href="#">UserSignUp</a>

Clicking on the [Discussions](#) link accesses the Topics Management Page.

### Discussions Features Management

Discussion Features

Add Discussion Topics? ☒ Yes ☐ No

[Topics](#)

Save

Print

Cancel

Close

Clicking on the [Topics](#) link accesses the Topics update page where discussion topic categories may be viewed. Click on a topic to update it. Click on [Add New Topic](#) to add more topics.

### Discussions Topics Management

[Arts Funding](#)  
[Membership Drive](#)  
[Website Management](#)

[Add New Topic](#)

Print

Cancel

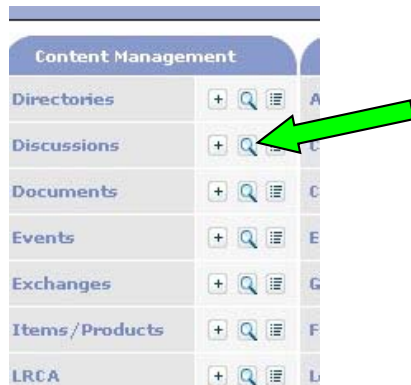
Close


Administration should predetermine the topic categories appropriate for their organization.



### 1.5.3 Moderate Discussions

Many organizations choose to moderate their discussion groups by regularly reviewing discussion topics and replies. To access the discussions search page, click on the Discussions Browse icon located in the Content Management column of the Site Administration Menu.



All discussions can be displayed by clicking the  button on the *Search For Discussions* page. Or, criteria may be entered into appropriate fields to search for specific discussions.

**Search For Discussions**

Search Criteria		Include deactivated records in search results <input type="checkbox"/>	
Discussion ID:	<input type="text"/>	Title:	<input type="text"/>
Created Date Range:	<input type="text"/> to <input type="text"/>	Modified Date Range:	<input type="text"/> to <input type="text"/>
Topic:	<input type="text" value="All Topics"/>	Items Per Page:	<input type="text" value="10"/>

Quick Search on Discussion Title:


A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Individual Discussions can be viewed by clicking on their labels on the Found Discussions page.

Found Discussions

Page 1 of 1		Total matches:6
ID	Discussion Title	
3	<a href="#">ASAE</a>	
4	<a href="#">Job Hunt</a>	
6	<a href="#">New Members</a>	
1	<a href="#">NPO Software</a>	
2	<a href="#">Press Releases</a>	
5	<a href="#">Private Board Discussion</a>	

A discussion can be deleted by clicking the  at the bottom of the Discussion Management page. Or, the discussion title and text may be modified and then saved by clicking on the  button.

Discussion Management		
<b>Description</b>		
Discussion Title:	<input type="text" value="ASAE"/>	
Discussion Text:	<input type="text" value="I'm thinking of joining the American Society of Association Executives. If you are a member of ASAE could you tell me about your experience?"/>	
<b>Record</b>		
Created By:	Anita Giagrande	07/01/2003
Modified By:	Anita Giagrande	07/01/2003
Active:	<input type="button" value="Yes"/>	
Expires Date:	<input type="text"/> 	
ChapterID:	1	
Topic, Level:	<input type="button" value="None"/>	<input type="button" value="All Levels"/>
Private:	<input type="button" value="No"/>	

[Discussion Replies](#)

**Discussion Replies Link** - Clicking on the Discussion Replies link displays all the replies related to the discussion. This feature can be used by administrators who wish to review the discussion forums and delete undesirable messages. Each reply is followed by a [Delete](#) link. Clicking on the [Delete](#) link removes the reply record permanently.

[Discussion Replies](#)