RealizationEngine User Documentation

9th August 2002

The *RealizationEngine* is a powerful and flexible communication tool that we are happy to provide for our organization. The *RealizationEngine* is more than just a discussion board, it is also for project management, virtual meetings, planning, organizing, documentation and much more. Below you will find some information on what is available in the *RealizationEngine* toolbox...

1   Copyright

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2   What is the *RealizationEngine*?

The *RealizationEngine* is not e-mail. Think of it as a discussion around the kitchen table. The big difference is that everyone can talk at the same time, no one has to shout, and everyone can hear what you're saying. You can also create virtual rooms. These rooms serve to seperate discussions by category or by groups.

3   Background

In about 1992, I started an Internet e-mail list with the blessings of a national organization. The list was fun, and in a matter of weeks after getting a notice on that organizations web page and a listing in the back of their quarterly magazine we had 50 subscribers and a lively discussion. After a few more weeks, we had 75 subscribers and soon 100. Reading, contributing to and maintaining the list was enjoyable and not a burden. When the list reached 250 subscribers, I recruited a co-admin to help me in the duties. Years past and the list reached 450 subscribers. Some days the list generated upwards of 75 messages a day for several days in a row and seldom saw less that 25 messages in a day. The burden of managing the mail became a weight, and I was obliged to push the list off on my co-admin. Finally, I dropped from the list all together and stopped mail delivery. I was simply not able to enjoy reading message after message.

During this time, I had attempted to participate in several different Internet Bulleting Boards. All of the early boards presented messages one at a time with the required delay between reading them. The advantage over e-mail was that messages could easily be ignored, even whole threads. The disadvantage was that the context of the messages was difficult to follow, and skimming quickly was impossible. Generally, I became frustrated within just three or four messages and left the board.

Other message boards presented the messages in a straight-down, chronological order, but trying to understand the context of a message required backtracking over every message to understand what the author was responding to. Again, two or three threads, and I simply abandoned the site all together.

itterally for years, I struggled with how information could best be displayed to render it meaningful, in-context, and with some indication of importance. Many attempts have been made, I have reviewed many of them, and I have been le

4 User Accounts:

4.1 Create new account:

- click the 'login' button

- click the 'create new account' button

- enter the account name

  - ask your adminstrator if there are rules that apply to account names
  - account names are limited to 15 charactors
  - all account names and passwords are case sensitive.

- enter your e-mail address

  - A valid e-mail address is required so that your password can be sent to that address.

- The system will generate a random password and send that password and account information to the e-mail address you entered in the dialogue.

4.2 To change your password:

- click on the 'account maintenance' button at the top of the page

- type new password

- retype new password (for confirmation)

- click the 'change password' button.

4.3 To change your e-mail address:

- click on the 'account maintenance' button at the top of the page

- type new e-mail address

- retype new e-mail address (for confirmation)

- click the 'change e-mail address' button.

4.4 "Lost" accounts [NOTICE!]

- In the case that you have failed to update your e-mail address in the system, and then forget your password, **DO NOT create a new account.** Instead, contact the administrator of your RealizationEngine to have your account updated with your new e-mail address. After they have updated your e-mail address, you my request your login information from the login screen as usual.

4.5 Changing user name

- In the case that you are not satisfied with your current username, your current username is not appropriate, or your name changes, the administrator can change your user name in the system. When the administrator makes the change, all of your old messages will appear under the new name as well as messages created after the change. The new user name will be used for login. When the administrator changes the user name in the system, a notification message will be automatically generated and sent to you at the e-mail address for your account. (new in version 1.0.9)

5 Messages:

5.1 To create a new message:

- click on the 'new entry' button at the top of the page, or
- click the "Reply" link to reply to an existing message
- type or edit the message title
- type the message contents
- (optional) add a link

  - when submitting links, you should include the "http://" portion of the link
  - if the "http://" is omitted, the link will not work properly.

- (optional) add a link name
- (optional) select a file for upload

  - click the 'Browse...' button
  - select the file to upload
  - click 'OK' or 'Open' (depending on your browser)

- click the 'add entry' button

5.2 Editing messages:

- The message contents can be edited by the message owner ONLY.
- The user has a specified amount of time that they can edit the message contents or message name, usually 24 hours. This allows time for corrections and minor revisions.
- After the specified 'grace period' has passed, the message is 'locked' by the system.

6 Groups:

- Groups are sets of users.
- Groups are used to grant and limit access to information on a folder-basis.
- Groups are created by and managed by the RealizationEngine administrator.
- The administrator is responsible for assigning the appropriate users to the appropriate groups.

7 Folders:

7.1 Create a new folder:

- click on the 'new folder' button
- type the folder name.
- select group for folder to belong to.
- set Read and Write permissions (see below)
- type folder description
- click the 'add folder' button

7.2 Folder permissions:

Here is a brief discription of how folder permissions work:

- Group (read, write) Other (read, write):

    - any user can access, read, and write to this folder. Group members can create subfolders.

- Group (read, write) Other (read):

    - any user can access and read the contents of this folder. Only group members may create messages in this folder.

- Group (read, write) Other (none):

    - any group member can access, read and write to this folder. Non-group members are not able to read or write to this folder.

- Group (read) Other (read):

    - any user can read this folder, only the folder owner can write to this folder.

- Group (read) Other (none):

    - any group member can read this folder, only the folder owner can write to this folder. Non-group members are not able to read or write to this folder.

- Group (none) Other (none):

    - this is a private folder that only the folder owner can read or write to.

7.3 Folder names:

- Folder names are restricted to containing only alpha-numeric characters and space ( ), period (.), tilde (~) and underscore (_).

- Attempting to include other charactors will result in an illegal charactor error.

7.3.1 Special Characters:

- Beginning a folder name with a '~' will cause the folder to be listed after the folders that start with alpha and numeric charactors.

- Beginning a folder name with a period (.) will cause the folder to be 'hidden.'

    - This will mean that only members of the group will see the folder in the folder list.
    - This is often used for private or administrative folders that are not of interest to the general population.
    - 'Hiding' a folder does not imply restricted access to non group members – be sure and set folder permissions accordingly.

- A folder name that starts with '~.' is also hidden, and will be listed lower in the folder list.

7.4 Folder descriptions:

- The folder description area can be edited at any time, but only by the folder owner.

- This is the only content that can be edited over time. This makes the folder description area useful for creating documents that change with time, or that are works in progress. It can also be used to leave brief notes for users that have access to the folder.

7.5   Editing folder attributes:

If you are the owner of a folder, you may edit the folder attributes at any time. To edit the folder attributes, click the "folder attributes" icon (a small page with a key), which appears to the right of the folder name at the top of the page. From the folder attributes page, you can:

- edit/change folder name

- change the read and write permissions

- change the group the folder is assigned to (any group you are a member of)

- move a folder — user can move a folder to any other folder they they are authorized to write in

- edit/update the folder description

- close or open a folder. (Folders are open by default when created. A "closed" folder allows the information to be read and searched, but cannot be added to. This is useful when using folders for project management, meeting notes or limited discussions. A folder can be reopened later from the same dialog if it is needed.)

Notification / Status Checking

There is a method by which a user can have the *RealizationEngine* checked and be notified when new messages are left in the database.

8   Status Check

8.1   URL, API and method

The URL for requesting the status (total messages:today's messages:new messages) of your account and the API for decoding the response from the RealizationEgine is available at http://www.RealizationSystems.com/.

8.2   *RealizationEngine* Status Check Clients

One such client for Unix/Linux and Win32 is **rcheck** and is available from Realization Systems, Inc. and is available at http://www.RealizationSystems.com/. This clients is a beta released, released under the GPL, provided at no cost and without warantee.

If you create a status checking client for the RealizationEngine, and would like to have it listed here, let us know, and we will be glad to add it to this list.

9   Contact Information

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