Screen Porch: *Caucus™ 3.1 Product Description*

- **Caucus 3.1** is the *Premier* conferencing software for the Web. Its feature set and user interface draw on 10 years of experience in computer conferencing on private networks.

- Caucus is complete, and it works. It is intuitive and involving. It takes maximum advantage of the multi-media nature of the Web to enhance conferencing beyond simple text exchanges. And Caucus allows for complete customization -- of visual appearance, functionality, scale, and interface.

- You can use Caucus to create a full-blown conference center running hundreds of conferences, or develop a chain of conference centers to meet your organization's needs worldwide. Or, you can simply attach a **Caucus Discussion Object**™ to literally anything at your Web site. Caucus handles the full range of conferencing applications.

- Whether you use Caucus templates to implement "out of the box" conferencing, or customize your conference center from the ground up using our super HTML interpreter, CML (the Caucus Markup Language), Caucus will bring your Web server to life as a focal point for groups of people staying in touch and working together.

- Several documents, including our Caucus Specifications, help explain Caucus, its architecture, control language, and features. You can try Caucus at our Conference Center. Or, register to download a free 30-Day Trial Version of Caucus.

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◀ Screen Porch: *Caucus™ 3.1 Documents* ▶

The following documents will help you understand Caucus 3.1. Please feel free to download any or all of them. To experience Caucus yourself, please visit our Conference Center.

- **Caucus Specifications**
  A description of the Caucus conferencing environment, its features and benefits, conference templates, and CML, the Caucus Markup Language.

- **Conferencing On The Web : A White Paper**
  How interactive applications for communications and collaboration will transform the Web and the workplace.

- **Caucus Installation Guide**
  Full details on how to Install the Premier Conferencing System on the Web.

- **Caucus Installation "readme.txt" file**
  The quick-start "read me" file for installing Caucus. Included with each Caucus kit.

- **CML Reference Guide**
  The Caucus interface is written in CML, the Caucus Markup Language. Here are the nuts and bolts of how CML works.

- **Conference Organizer's How To**
  The person in charge of a Caucus conference is called the **organizer**. This guide details how to start and run a conference.

- **Guide for Conference Organizers**
  This guide talks more about the **why** of organizing the conference, and the human issues involved.

- **Caucus & Virtual Hosting**
  This page describes how to implement different Caucus interfaces for different "virtual hosts".

- **Caucus E-Mail Interface**
  This page describes how add e-mail only participants to an on-going Caucus conference.

- **Caucus 2.7 (Text Interface) Documents**
  An earlier version of Caucus supports several text-based interfaces. You can now download the guides for the text interface software:

  - Caucus 2.7 User's Guide.
  - Caucus 2.7 Menu User's Guide.
  - Caucus 2.7 Installation Guide.
  - Caucus 2.7 Customization Guide.

◀ Screen Porch: *Caucus™ 3.1 Installation Guide* ▶

This document describes the steps and procedures to **install** and **manage** Caucus on your Unix Web server host. It is stored as an **RTF** (Rich Text Format) file, which is readable by most word processors.

● Download the Caucus 3.1.1 installation guide, in RTF form.

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◀ Screen Porch: *Caucus™ 3.0 Specifications* ▶

● Caucus turns an organization's Intranet Web server into a teamwork server. Caucus conferences help people establish goals, manage projects, give and receive feedback, share ideas and documents, and make decisions.

● Caucus conferences empower an Internet site to offer new information every day. Seeking to be in touch with each other and your personnel, visitors will return repeatedly to your site, to talk about your products, receive technical support (and support each other too), suggest improvements, and respond to your requests for feedback.

- Leverage your Web site's most important resource - Your Visitors

- New visitors are drawn to your site's dynamic interaction

- Repeat visitors keep on learning and contributing

- A dynamically growing knowledge base builds at your Web site

- A community of interest and knowledge builds at your Web site

- Workgroups, departments, project or management teams, or a virtual enterprise -- Caucus conferences benefit them all

Caucus : the premier conferencing software for the Web
The Caucus conferencing database -- the product's core code -- is powerful and mature; its Web interface is flexible, intuitive, and rich; and Caucus includes pre-built conference templatesaswell as Screen Porch's Super-HTML interpreter, CML -- the Caucus Markup Language.

Caucus Templates : Built-in Conference-Builders
As delivered, Caucus includes a set of templates which allow an organization to develop its suite of conferencing applications quickly. Caucus templates enable you to be up-and-conferencing soon after you receive your software. The entire Conference Center at the Screen Porch Web site was generated from templates built into Caucus.

CML : the Caucus Development Environment
CML is a flexible and fully-featured control language for custom conference development. Using CML, an organization can customize its conferences, building on and beyond the foundation of Caucus templates. CML allows an ent erprise or a developer tocreate new conferencing features and extensions, or to create a custom conferencing environment from the ground up. Caucus templates are themselves pre-defined and pre-designed Conferencing pages created in CML.

CML is completely compatible with HyperText Markup Language (HTML), the basis for the Web, but extends HTML with approximately ninety (90) new functions. A simple but robust and functional interpreted command language, which includes conditional logic and control flow, CML allows the developer substantial flexibility in designing a feature-rich and secure conferencing environment.

CML manages a user's conference participation by generating HTML pages dynamically. These pages of conference data are dynamically generated, formatted and returned by CML -- in HTML -- to the user's browser (for review and further interaction).

Caucus and CML are fully HTML-compatible. Your Web conferences can capture and extend the look of your Web site and your company's visual identity. Like any other Web page, a Caucus conference page, conference item, or an individual's response can include text, graphics, audio, video, Javascripts, Java Applets and HTML links to data and program objects anywhere your network reaches.

Caucus Site Owner features

- Includes a full template-based conferencing system
- Provides a powerful interpreted control language to customize templates or develop new templates and features
- Includes a fully-scripted administrative interface
- Supports conference moderation
- Supports all Web server or client security models
- Supports multiple Unix platforms
  - HP-UX, SunOS, Solaris, DEC-UNIX (OSF/1), Unixware, SCO, Linux, AIX, SunOS, IRIX, BSDI, *and others; please inquire*
- Windows NT Support -- Coming soon to a server near you
- Compatible with CGI-compliant HTTP servers: NCSA, CERN, Netscape
- Compatible with all HTML 2.0 and 3.0 browsers: e.g. -- Netscape and Internet Explorer

Caucus User Features

- Requires no client software -- user works in a familiar browser environment
- Offers an intuitive model of conferences, items, and responses
- Automatically formats text responses
- Allows a user to view and edit responses
- Shows a scroll of responses -- a conversational give-and-take within each item
- Automatically recognizes hypertext links typed in items and responses and makes them "hot"
- Supports images, audio, video, Javascripts, applets, and all html objects throughout
- Allows full user information, editable at any time
- Allows text-based searches of items and responses

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Screen Porch: *White Paper*

Conferencing On The Web : Communication & Collaboration At Every Desktop

Networked Information on the Web
The Web is now ubiquitous. For organizations, it has provided a low-cost platform for distributing information throughout a networked organization as well as to constituents and customers with Internet access. For users, it has become a single, simple, friendly interface to information worldwide.

Early Web Applications
But, the first generation of Web applications have been static. The initial use, and still the prevailing use, for Web sites on the Internet and internal networks (Intranets) has been to publish and distribute fixed pages of information in a hypertext interface. In these applications, communication consists of pre-formatted information, and such information travels in one direction only -- from server to client.

More recently, organizations have begun to create and deploy Web-based interfaces to a variety of databases and document archives. In these second-generation applications, a user is able to query information (often using SQL) through a Web server, establishing an important measure of control over the format and structure of the information on the Web page before him. Even in these applications, however, information continues to move in one direction only, still flowing from server to client.

A New Generation
Now, we are at the birth point of a new third generation of Web applications, true networked and internetworked applications that enable dynamic two-way, even multi-way, communication and collaboration on the Web. These new applications will enable remarkable new uses of the Web in the organizational workplace and on the Internet.

Such applications benefit from the traditional ease and economy of Web-based applications. On the server side, they are quick to develop and economical to deploy. Because they require no proprietary client software -- indeed they are client-platform-independent -- they impose no burden of software distribution, configuration or support.

Such applications have been made possible by the development of new development tools for the Web. Of particular importance among these tools are engines and control languages which can dynamically generate Web pages in HTML, while employing variables, functions and programming logic to adapt these pages in form and content to the particular context and command of a user.

Conferencing On The Web
At the heart of this third generation of Web applications is Conferencing on the Web. Conferencing on the Web may be defined as the dynamic exchange of all kinds of information -- text, graphics, HTML links to information, audio, video, etc -- in a context of structured conversations organized by item and allowing a participant to contribute spontaneous responses to any item in the

conversation.

The goal of such a structure of online conversations may be decision-making, technical support, community-building, project management, distance education, electronic meetings and more. Nearly any goal, which people strive to reach through two-way or multi-way communication, can be the source of a dynamic application for Conferencing on the Web.

A Brief Survey of Computer Conferencing Systems
Computer Conferencing is by no means a new application. Computer Conferencing systems have existed since the 1970s, deployed mostly at universities, research facilities and government installations -- all environments with many linked desktops. Aside from systems specifically designed for Computer Conferencing, USENET News groups, Email Listservs, and BBSs have all provided one form or another of conference-like exchange. On-line services also offer threaded discussion areas.

More recently, organizations have begun to use conferencing internally, as a way to improve communication and enable ongoing collaboration among workgroups and project or management teams. Proprietary networked messaging systems like Lotus Notes have offered these conferencing capabilities. In the case of Notes, each desktop requires a proprietary client software package, which comes with a significant support load. On the server side, Notes employs a complex scheme for database replication among far-flung servers.

Conferencing On The Web : System Advantages
Conferencing on the Web offers a simpler model for enabling people to communicate and work together from their desktops across Wide Area Networks. This single platform can support group interaction and collaboration within and across enterprises, and between enterprises and their customers or constituents.

Replication among servers is unnecessary in most environments. The Internet's ubiquitous transport protocols together with the Web's http protocol make virtually any server reachable from virtually any desktop. Moreover, Conferencing on the Web requires no custom software at the client's desktop. The browser, with its simple and familiar Web pages, is the only tool required.

The Web browser is quickly becoming a universal network client -- the display and interaction point for a wide variety of seamlessly integrated networked applications. Conferencing on the Web allows discussion and information exchange to be linked to virtually any other Web-based application.

Because a contribution to a conference item can include text, graphics, audio, video, "live" HTML links to information worldwide, and more Conferencing on the Web lets people wrap all kinds of data, analysis, opinion, evidence, etc. in simple packages and add them to an ongoing conversation. In this way Conferencing on the Web positions online conversation as a key environment for collaboration.

Conferencing On The Web : How, When & Where
Applications for Conferencing on the Web suggest themselves readily. Within an enterprise, an application as general as discussion and feedback on Human Resources policy, and one as specialized as interaction among a distributed team scouting locations worldwide for a new company facility, are both ideal for Conferncing on the Web.

Because of the universality of the Web, it is possible to integrate groups and systems between enterprises without a great deal of effort. A manufacturing company and one of its suppliers,for example, might use Conferencing on the Web to improve the performance of a "Just-in-Time" inventory supply system.

At an Internet site, Conferencing on the Web is a powerful tool for supporting customers, building loyalty and a sense of community, and enabling members of your constituency to add value for each other. The conclusion is clear. Wherever collaborative work methods are important in order to achieve success for a project, team, or an enterprise as a whole, Conferencing on the Web is a natural tool to employ.

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```
                Caucus 3.1.1 Brief Installation Guide
                         Screen Porch LLC.
                         20 February 1997
```

I. INTRODUCTION

This is the BRIEF, plain-text version of the Caucus 3.1.1 Installation
Guide. It is intended only for knowledgeable system managers and
webmasters who want to get Caucus up and running quickly.

Far more information is available in the official "Caucus 3.1.1
Installation and Manager's Guide", which can be downloaded from
http://screenporch.com/doclist.htm.   (The Guide is published in
RTF or "Rich Text Format", which can be read by any word processor.)

Questions and comments are also welcome on our technical support
conferences, at http://screenporch.com/jumpin.htm.

II. INSTALLATION

II.1 Create the Caucus Userid

Create a new userid, called "caucus", with its own home
directory. (You may use a different name if you prefer. The
installation procedure will adapt to whichever name you
choose.) The home directory for Caucus must have enough free
disk space to contain all of the Caucus programs and data
files, and all of the anticipated conference data. A minimum
of 100 megabytes is recommended. (The software itself is
about 20 megabytes, maximum.)

II.2 Unpackage the Software

The software installation is the same whether you are:

  * installing Caucus for the first time
  * upgrading your existing Caucus software

The installation procedure automatically determines if this is
a new installation of Caucus or an upgrade to an existing
Caucus site. If you are upgrading Caucus, your existing
conferences will not be affected by the upgrade.

Login to the Caucus userid. You must actually log in to this
userid; do not use "root" or "su" access.

These instructions in this guide assume that the Caucus home
directory is in /home/caucus. In this guide, whenever you see
the path /home/caucus, replace it with the actual pathname of
the Caucus home directory on your system.

Cease using Caucus. If you are upgrading Caucus, all Caucus users
should exit or quit the program while you are performing the upgrade.
To make absolutely certain of this, type the commands:

```
     mv  BIN2/caucus_x  BIN2/caucus_x.old
     ./swebstop
```

The Caucus software is delivered in a file called caucus31.t.Z.
In the Caucus home directory, type the command below to unpackage
this file.

```
    zcat caucus31.t.Z | tar xvf -
```

(You have probably already done this in order to be reading this file.)

II.3 Run the installation script

The software includes an installation script that will
automatically create the proper script files, set the proper
file permissions, and so on. To run the script, type:

```
    ./cinstall
```

The script will ask for the hostname (and port number, if
needed) of your web server. Be prepared to provide these.

The cinstall script will produce some warnings and informative
messages on your screen. A copy of these warnings is also
placed in the file caucus.warn.

The cinstall script also creates two scripts called cv2 and
cv2check. Cv2 is the script used to run the text interface to
Caucus. Cv2check provides a quick summary of how much new
information there is in the conferences that you belong to.

If you have purchased the unlimited text-interface license
option for Caucus, and are providing access to the text
interface to your users, you probably want to copy these
scripts to a public directory, such as /usr/local or
/usr/local/bin. You may also wish to rename the scripts to
something more mnemonic, perhaps caucus and caucuscheck.

Caucus places certain files in the Caucus userid's public HTML
directory. The standard name for this directory is
public_html. The Caucus distribution includes a public_html
directory with the necessary files already in it. If your
httpd server uses a different name, rename public_html to that
directory name now.

II.4 The Caucus Management Menu

Most of the common Caucus administration functions are
provided in a menu in the shell script manager_script. To see
this menu immediately on login to the caucus userid, run it
directly from your .profile or .login file, as described
below:

If you are running the Bourne, Bash, or Korn shell (sh, bash,
or ksh), you will usually see a "$" as your Unix command
prompt. Edit the file .profile, and at the very end, add the
lines:

```
$HOME/manager_script
code=$?
if test "$code" = "1"; then
    exit
fi
```

Alternately, if you are running the C shell (csh or tcsh), you
will usually see a "%" as your Unix command prompt. In that
case, edit the file .login, and at the very end, add the
lines:

```
$HOME/manager_script
if ( $status == 1 ) then
    logout
endif
trap 2
```

In either case, logout and then log back in again, and you
should immediately see the Caucus management menu.

II.5   Starting and Using Caucus

To start the Caucus server, choose the appropriate selection
from the Caucus Management Menu.

You should also add the lines shown below to your system
start-up file (such as /etc/rc.d/rc.local, or whatever it is
called on your host) so that the Caucus server will start when
your system reboots.

```
rm -f /home/caucus/SOCKET/sweb
/home/caucus/SWEB/swebd   /home/caucus/SWEB/swebd.conf
```

The Caucus installation script creates a default HTML page for
accessing the Caucus conferences on your host. It is located
in /home/caucus/public_html/caucus.html. The URL for this
file is:

```
http://yourhost/~caucus/caucus.html
```

This file is just a template for how to access Caucus from the
Web. If your organization already has a set of web pages, you
will probably want to integrate this file with your existing

pages. You might choose to copy the links in this file to the
appropriate places on your existing web pages; or you might
decide to edit the caucus.html file and simply make it look
more like your other web pages.

III. CONFIGURE YOUR WEB SERVER

Sections III.1 through III.4 describe, in the abstract, the changes
that must be made to your web server configuration to make it work
properly with Caucus. Subsequent sections describe the
precise details of these changes for the servers listed above.

Once you have made these changes, your Caucus site will be up
and running! But you should continue on and read chapter 4,
"Userids and Passwords", to understand the implications of
userids and passwords on the Web.

III.1 Define CGI directories

Caucus uses several different CGI programs in the directories
SWEB and REG to communicate with the web server. The best way
to identify these programs to the web server is to declare
SWEB and REG as CGI directories.

Specifically, declare the following mappings of URLs to CGI
directories:

        http://yourhost.com/sweb/   to   /home/caucus/SWEB/
and   http://yourhost.com/reg/   to   /home/caucus/REG/

If for some reason you cannot declare a CGI directory, enable
your server in some other way to treat the files:

     /home/caucus/SWEB/start.cgi
     /home/caucus/SWEB/swebsock
     /home/caucus/REG/swebsock

as CGI programs.

III.2 Define special "/caucus" URL

Caucus users who have already registered a userid may go
directly to specific conferences, items, or responses through
the special URLs shown below.

   http://yourhost.com/caucus   ("Caucus Center" page)

   http://yourhost.com/caucus/conference_name   (conference home page)

   http://yourhost.com/caucus/conference_name/item   (go to that item)

   http://yourhost.com/caucus/conference_name/item:response
                                                 (go to that response)

In order to make these special URLs work, the web server must
be configured to map URLs that begin "http://yourhost.com/caucus"
to the CGI file /home/caucus/SWEB/start.cgi. (This may not be possible
for all sweb servers. Users of such servers can still access
Caucus through the regular caucus.html page.)

III.3 Restrict Access with userids and passwords

Caucus' security requires that each user be identified by a
unique userid and password. Caucus uses the standard web
"access authorization" protocol to implement userid and
password checking.

To enable access authorization for Caucus, you must declare
that the directory /home/caucus/SWEB is protected by a userid
and password database file. For some web servers, this is
done automatically by the Caucus installation script.

III.4 Restart your server

Some web servers must be shutdown and restarted before any of
the previous changes will take effect. See your web server
documentation for details.

III.5 NCSA or Apache Web Server Instructions

This section describes the precise details of configuring the
NCSA or Apache web server to work with Caucus. It assumes
that you have already installed your web server and are
generally familiar with the server configuration files.

Find the httpd configuration file srm.conf. Edit it, and add
the lines:

    ScriptAlias /sweb/   /home/caucus/SWEB

    ScriptAlias /reg/   /home/caucus/REG

Define special "/caucus" URLs. Also in srm.conf, add the lines:

    ScriptAlias /caucus/ /home/caucus/SWEB/start.cgi/
    ScriptAlias /caucus /home/caucus/SWEB/start.cgi

Restrict Access with userids and passwords. Access authorization
for NCSA and Apache servers is set up automatically by the Caucus
installation script. It creates the file /home/caucus/SWEB/.htaccess,
which declares that the directory is password-protected. That file
points in turn to the userid and password database file
/home/caucus/caucus_passwd, which is also set up by the Caucus
installation script.

You must restart the httpd server in order for these changes
to take effect. See your server documentation for details.

III.6 Netscape Enterprise Server 2.x Instructions

This section describes the precise details of configuring the
Netscape Enterprise Server, version 2.x, to work with Caucus.
It assumes that you have already installed your web server and
are generally familiar with server configuration.

Define CGI directories. From the server configuration page,
choose "Programs", sub-selection "CGI directory". Add entries for:

    URL prefix sweb/,   CGI directory /home/caucus/SWEB/

    URL prefix reg/,   CGI directory /home/caucus/REG/

And choose "save and apply" these changes (replacing
/home/caucus with the home directory of the Caucus userid on
your system).

Define special "/caucus" URLs. From the server configuration page,
choose "Programs", sub-selection "CGI directory". Add an entry for:

    URL prefix caucus/,   CGI directory /home/caucus/SWEB/start.cgi

And choose "save and apply" these changes.

Restrict Access with userids and passwords. In the directory
/home/caucus/SWEB, create a world-readable file called .nsconfig,
containing the lines:

    RequireAuth userfile=/home/caucus/caucus_passwd realm=Caucus userpat=*

From the server configuration page, chose "System Settings",
sub-selection "Dynamic Configuration Files". In the "file
name" field, type ".nsconfig". Do not change any of the other
settings or checkboxes in this form. "Save and apply" these
changes.

To add userids to the database file, use the shell script
manager_script. (Do not use the Netscape server user database
functions.) Or your users may self-register a userid and
password from the link in the caucus.html page.

It is not necessary to restart the Netscape Enterprise server.
All of the changes will take effect immediately.

You may, however, have to explicitly enable "user document
directories" (i.e., the public HTML directories) in order for
Caucus to work. To do this, from the server configuration
page, choose "Content Management", sub-selection "User
Document Directories". You don't need to make any changes,
just click on "OK" and "Save and Apply" to enable the user

```
document directories.
```

IV. OTHER INFORMATION

```
This is the end of the brief install guide for Caucus 3.1.1.  There
is much more information about the management and customization
of Caucus, and other topics, in the full install guide.
```

Screen Porch: *Conference Organizer's "How To"*

The person(s) in charge of a Caucus conference is called the **organizer**. This document is a "How To" on starting and running a Caucus conference. It assumes that you are already familiar with the general use of Caucus, and now want to manage a conference.

● Read online through your Web browser.
  (Some formatting details will be lost.)

● Download RTF (Rich Text Format) file.
  This format is readable by most word processors.

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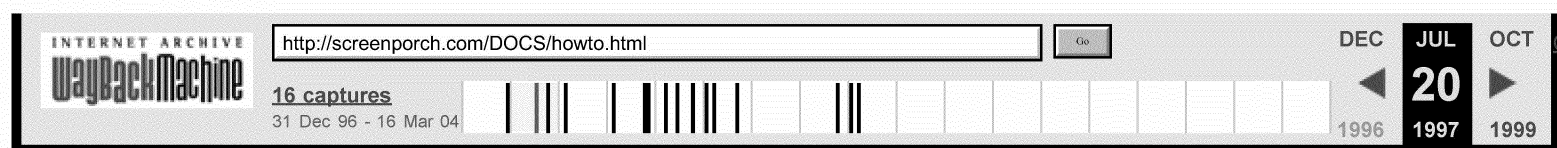
Caucus

Conference Organizer

"How To"

Last revised: 4 April 1996

1. Introduction

This "How To" guide describes the details of **how** a Caucus conference organizer administers a conference. For more general information about the **whys** of conference management, see the companion Guide for Conference Organizers.

Note that Caucus has both a World Wide Web interface, and a "text" or command line interface. The instructions in this guide usually refer to the Web interface, although instructions for the text interface are shown in parenthesis at the end of each section.

When the Caucus administrator creates a conference, he or she also assigns someone to be the primary organizer -- the person in charge of the conference. Caucus gives this person special abilities.

The primary organizer may in turn give other people these special abilities in order to share the power and responsibility of managing the conference.

2. Starting a Conference

To create a new Caucus conference you (or the Caucus administrator for your site) must run a companion program called **cv2start**. Login to the "caucus" userid on the Caucus server host, and type "cv2start". The program will ask several questions about the new conference. These include:

* what is the name of the conference?

* what is the userid of the primary organizer?

* should this conference be open to everyone?

* permit this conference like another one?

* make this conference LISTED or UNLISTED?

* should this be a CONFERENCE or a LIBRARY?

* who are the other organizers (if any)?

* which groups should be allowed to use this conference (if any)?

Once you have answered all the questions, you also are given the opportunity to edit the conference user list that controls who may join the conference.

Conference names may be up to 20 characters long but cannot contain any blanks. You may use underscores to link words, as in "MY_CONFERENCE". (Conferences may not be named CHECK, HELP, STOP, or LIST, because these are key commands for the text interface.)

The "CONFERENCE or LIBRARY" question determines the type of the conference. A CONFERENCE is a traditional discussion conference with items and responses. A LIBRARY is a conference that is organized as a

file library. File libraries are not currently available for use with the Web interface to Caucus.

Cv2start creates an empty conference with no items, no participants, and a default INTRODUCTION and GREETING. (These terms are defined below.) The organizer should join the new conference as soon as is convenient to prepare the conference for its participants.

3. Customizing a Conference

Caucus gives the organizer of a conference special abilities to assist with setting up and maintaining a conference. Many of these abilities, such as controlling who can join a conference, are provided by the **customize** link in the conference home page (or the CUSTOMIZE command in the text interface.) Only the organizer can use this feature.

Pressing the customize link brings up a form (a page with various check boxes and text boxes) that the organizer uses to modify the conference. This form includes boxes for:

* "**Allow users to add new items?**" This lets the organizer control whether or not members can add new items to the conference. Checked (or "yes") is the default value and means anyone can add an item. Cleared (or "no") means only the organizer can add new items. ("Customize ADD" in the text interface.)

* "**Allow users to edit their own responses?**" lets the organizer control whether or not participants can change the text of their own items or responses. Checked (or "yes") is the default value and means anyone can change an item or response that they entered. Cleared (or "no") means only the organizer can change items or responses. ("Customize CHANGE" in the text interface.)

* "**Make the conference visible to non-members?**" controls whether your conference is "listed" or "unlisted". If your conference is **listed**, its name will appear with the other visible conferences on the Caucus Welcome Page. If your conference is **unlisted**, its name will not appear unless the user is already a member of the conference, or can become a member of the conference. ("Customize VISIBILITY" in the text interface.)

* "**Edit the userlist...**" lets the organizer control who may join the conference. A conference is created with an initial user list; typically one that allows anyone to join the conference. The organizer can edit this list to specifically include people, exclude people, permit read-only members, or add other organizers to the conference.

The user list has a special format which must be followed precisely. Each line in the list contains only one word, either a userid, a group file name, or a control word. The control words are **:include**, **:exclude**, **:readonly**, and **:organizer**. The control words affect the userids or group files immediately following them until the next control word or the end of the list is reached. Here is a simple example:

```
:include

harpo

chico

:readonly

zeppo

:organizer

groucho
```

The userids "harpo", "chico", "zeppo", and "groucho" are included in this conference. This means that they may join the conference. No one else is allowed to join the conference unless the organizer adds their name to the list. Zeppo can only read the material in the conference. Harpo and chico can both read the material and add their own items and responses. Groucho can do anything that the primary organizer can do.

The user list Caucus displays is numbered in paragraphs and subparagraphs. Caucus numbers this list automatically. The subparagraph number is always 0 for "organizer", 1 for "include", 2 for "readonly", 3 is "exclude". For example if you type in the above user list, the next time you click on the customize link you will

see:

```
:1.1 include

harpo

chico

:1.2 readonly

zeppo

:2.0 organizer

groucho
```

A userid in the user list may contain a terminating asterisk(*) as a wild card. A wild card can replace entering a long list of individual userids. For example:

```
:include

smith

csc*

:exclude

csc101
```

means that userid "smith" and any userid starting with the letters "csc" may join the conference. The only exception is userid "csc101" who is specifically excluded from joining the conference.

The third kind of word that may be placed in a conference user list is a group file name. A group file is just a file that contains a list of userids. (See section 4 for more information about group files.) To use a group file in a user list, preface the name of the group file with the character "<". For example:

```
:include

<faculty

:readonly

<students
```

means that all userids in the group file "faculty" may join this conference, but userids in the group file "students" may only read this conference.

(The equivalent command in the text interface is "Customize USERLIST". It starts a text editor with the contents of the userlist.)

* "**Edit the HTML text of the greeting...**" lets the organizer edit the text of the greeting that appears **each** time a person joins the conference. Note that the greeting can include HTML and CML ("Caucus Markup Language") text. ("Customize GREETING" in the text interface.)

* "**Edit the HTML text of the introduction**" lets the organizer edit the text of the conference introduction. This is the text that appears the **first** time a person tries to join the conference. The introduction should briefly describe the purpose and content of the conference, and who should join it. ("Customize INTRODUCTION" in the text interface.)

4. Group Files

When many people are using Caucus on your computer system, you may find that they fall into distinct groups. For example, at a university you will have students, faculty, administrators, support personnel, and so on. These groups may in turn be divided into sub-groups: engineering faculty, liberal arts faculty, law faculty, etc.

Caucus can help you use these groupings to better control who has access to a conference. That is the purpose of the Caucus "group files". A group file is an ordinary text file that contains a list of userids, one per line. Users listed in a group file are members of that group. The name of the group is the name of the group file.

Group files are useful when a specific group of people need access to several conferences. Without group files, the organizer of each conference would have to edit the user list for that conference and add the userid of each member of the group. With group files, each organizer need add only one line to their user list: a "<" followed by the name of the group.

Group files are created and edited by the Caucus administrator (or anyone who can login as the Caucus administrator). All group files must be contained in the directory called **GROUPS** under the main Caucus directory.

Each line of a group file must contain either a single userid, a wildcard match, or a reference to another group file. A wildcard match must end with an asterisk ("*"). The wildcard match "xyz*", for example, means "any userid that begins with the letters 'xyz'." The third case, a reference to another group file, consists of a "<" followed immediately by the name of a group file. The contents of that file are included as though they were part of the original group file.

This last feature means that you can mimic the groupings and sub-groupings of your organization with Caucus group files. To continue the university example, the Caucus administrator might create a group file called **faculty**, which contains the lines:

```
<faculty.eng
```

```
<faculty.lib
```

```
<faculty.law
```

The group files **faculty.eng**, **faculty.lib**, and **faculty.law** contain the userids for the faculty members in engineering, liberal arts, and law. Or those groups could be subdivided further. For example, **faculty.eng** might contain:

```
<faculty.mec
```

```
<faculty.ee
```

These in turn would contain the userids for the mechanical and electrical engineering departments.

Group files may reference other group files, "nesting" indefinitely without limit. Be careful to keep your group files arranged in a hierarchy and not allow any loops. That is, if group file **a** contains "<b", then group file **b** must not contain "<a".

5. Other Functions of the Organizer

The primary responsibility of an organizer is to keep the conference running smoothly. The conference participants expect the organizer to answer questions, monitor the progress of the conference, assist in any communications difficulties, and in general help keep the conference well structured.

As organizer, you may want to structure the first few items of the conference. For example, Item 1 could explain the intents and purposes of the conference, Item 2 could be a place to discuss questions about Caucus, and Item 3 could be reserved for special bulletins or other timely announcements, such as "Class registration begins tomorrow, June 17, at 8:30 am".

The organizer also has the ability to change the text of any item or response in the conference, regardless of who entered it. This ability, however, should be used sparingly. A typical example would be helping a user make the text of his or her item more readable. If an interpersonal problem occurs in a discussion on the conference, as organizer you can intervene or even censor parts of the discussion. Fortunately, such problems are rare.

To change the text of an item or response, simply click on the **edit** button next to that text. Normally this button only appears next to responses that you wrote; but since you are an organizer, it appears next to all items and responses. (Text interface users can CHANGE ITEM or CHANGE RESPONSE.)

If your computer system hosts many different conferences with several organizers, you may want to start a conference specifically for organizers. This is a good way to share information and ideas about how to best set up and maintain a conference.

Screen Porch: *Guide for Conference Organizer*

The person(s) in charge of a Caucus conference is called the **organizer**. This document describes some of the **whys** and other human issues involved in organizing and running a conference. It assumes that you are already familiar with the general use of Caucus.

- Read online through your Web browser.
  (Some formatting details will be lost.)

- Download RTF (Rich Text Format) file.
  This format is readable by most word processors.

[**Welcome** | **Product** | **Conferences** | **Documents** | **Trial**]

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Caucus

Guide for Conference Organizers

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Last revised: 4 April 1996

This guide was written for the Center for the Instructional Computing and University Computing at Eastern Michigan University, Ypsilanti, Michigan. It has been revised and reprinted with Dr. Karabenick's permission. For more details about how to use Caucus features to start and organize a conference, see the companion guide Caucus Conference Organizer "How To".

This guide is intended for new organizers of Caucus conferences. Prospective organizers may be familiar with conferencing in general, and Caucus in particular; however, there are certain features and issues with which organizers need to be familiar and which deserve special emphasis. These are examined in the following sections. It should be noted that the original guide was written for a large conferencing system in a university setting, and a special section is devoted to that context. Most of the topics, however, are generic, and they apply to a wide variety of settings.

Furthermore, the Organizer's Guide was prepared as a stand-alone document, and it has its own set of organizer-relevant commands (13.9). Thus, Chapter 13, or a version specifically tailored to your hardware, system, and support environment, can be an effective supplement to your conferencing environment.

1. Starting Up

1.1 Types of Conferences

Each conferencing application will have a variety of conferences suited to that environment. In general there are two types.

Open

In an open conference, membership is available to anybody with access to the Caucus conferencing system. Open conferences cover general topics open to all. These can include anything from restaurant reviews and company picnics to office policies, vacation schedules, music, politics, and literature.

Restricted

Restricted conferences impose some limitation on membership. The organizer can specifically designate persons who may become full or read-only members and/or exclude others. Examples of restricted conferences are:

Course-related

In an academic setting one of the major uses is in connection with classes. In the typical course conference, membership is restricted to students and their instructor. Additional non-course participants, such as other faculty members or experts, are sometimes included (see Course Conferencing, section 7).

Special purpose

There are many types of special conferences whose membership may be partially or fully restricted. Examples in an academic setting are: thesis committees, faculty committees, student and faculty organizations and research groups. Business examples are: Boards of Directors, research and development groups, holiday party committees, and sales support groups.

1.2 Obtaining Computer IDs for Participants

Using Caucus requires some kind of computer account or "id". Typically these ids will either be assigned by your organization, or else can be selected by the users themselves. If you as an organizer are running a restricted conference, you will need to know your members id's so that you can identify them.

1.3 Starting a New Conference

In some applications, users are free to start their own conferences. In other settings, a conferencing system coordinator may restrict the number and type of conferences. Restrictions prevent duplication of discussions and conserve system resources. (For information on how to start new conferences, see the Caucus Conference Organizer's "How To".)

1.4 Learning to Use Caucus

It is very important that participants know how to use the system **before** engaging in any "serious" conferencing. Introductory training sessions led by experienced users, practice (fun!) conferences, and provision of quick reference guides to users are suggested.

2. Principles of Conference Organizing

2.1 Creating a General Framework

An organizer's first task is to provide a conference structure, or framework. Considerable time and care at this phase is suggested. The information participants first encounter begins to establish this structure.

Pre-conference Communication

Computer conferencing is often preceded by interaction using non-electronic means. Quite frequently, participants communicate with each other by phone and/or discuss the conference in person prior to any computer communication. These interactions may be augmented by printed material that announces the conference, its goals, topics to be covered, and information about the participants. Such interactions and information are especially important for first-time conference users. The more they know prior to going on-line, the more they can concentrate on mastering the conferencing system and substantive content. Consider the nature and extent of such preliminary communication and how it can help to achieve your conference's objectives.

Conference Interaction

Conferencing users are required to register the first time they use the system. That registration carries over to all conferences of which they become members. Their first interaction with a specific conference consists of an **introduction**, followed by a **greeting**. The organizer customizes them by editing some text inside Caucus.

Introduction

The purpose of the introduction is to describe the conference to prospective participants. It is displayed the first time a participant joins a conference. Its major utility is giving prospective members of open conferences enough information to decide whether they wish to join. For closed conferences the introduction is typically less important since it is presumed that members of a restricted group would already know why they are joining.

Greeting

The greeting is text that is displayed **every** time participants join a conference. The greeting can serve several

functions. For example, at the outset, it can serve to orient members by elaborating the conference's goals, purposes and etiquette and rules (see section 5). Later it can be used as a bulletin board for announcements or to direct participants to important new information, items, or responses. Some organizers prefer to keep greetings brief and use a separate item as a bulletin board.

2.2 The First Few Conference Items

The first conference items (discussion topics) have an important bearing on a conference's success. This is especially true when participants are new to conferencing. The following are recommended:

Extended Introductions

The first item gives participants the opportunity to expand upon the information they provided when they first registered in the conferencing system. Consider asking them to describe their background and/or provide other relevant information. This is especially important in larger and open conferences and even in small conferences in instances where participants are relatively unfamiliar with each other.

Purpose(s)

Even if discussed in other forms (e.g., in pre-conference interactions or hard-copy) an item devoted to the conference's purposes is worth including. This is your opportunity to restate the conference's goals and, importantly, to receive feedback from participants. It provides an opportunity for participants to ask questions and to suggest alternatives after having encountered the original introduction and greeting. The item may also be useful in keeping track of changes in objectives as the conference progresses.

Help With the Conferencing System

This item provides a central place to ask questions and serves to reduce the stigma that participants often attach to seeking help. It is especially important for novice conferencers.

Bulletin Board

Even if the greeting is reserved for fast-breaking news, an item devoted to a bulletin board is quite useful. Unlike the conference greeting, past information remains, and there is a record of prior bulletins.

Conference Rules and Norms

Another useful item is one reserved for the discussion of special conference rules or norms. For example, there may be issues of confidentiality, anonymity, adding items or altering previous responses, and rules of conduct (see Etiquette and Rules, section 5) that need to be stated and about which participants may have opinions.

3. Managing Your Conference

3.1 Facilitating Interaction

Starting Discussions

Participants, especially novice conferencers, are understandably reluctant to respond to "blank" items. Thus, a useful technique is for organizers to respond to their own items just to get the ball rolling. For example, an organizer might be the first respondent to the item used for extended introductions or the one used to discuss a conference's purposes.

Respond to Initial Responses

Keep in mind that while you may enjoy discussions and conferencing, some people do not. They may be cautious and embarrassed about stating their own opinions in public, and, quite possibly, intimidated by computers. It helps if organizers respond to participants' contributions either in the conference itself or by sending a private message acknowledging their input.

Developing a Sense of Cohesion

Although physically and temporally separated, regular conference participants can develop a feeling of cohesiveness. This dynamic varies according to the nature of the conference. It is more evident in longer-lasting working groups than in large open conferences, but it is usually present in all conferences to some degree.

Organizers can play an important function in nurturing cohesion. It helps to greet people when they join. Ask them questions. Encourage people who have not contributed to do so rather than just to read. Give participants feedback! Remember, as in face-to-face discussions, participants who are consistently ignored, who feel they are talking to themselves, will cease to contribute.

Lighten Up!

Humor can be an important element of discussions. If not spontaneously generated by participants themselves, consider injecting some in otherwise "serious" conferences. It helps relax people if you break the ice first.

Degree of Organizer Participation

Too many public responses by an organizer can make a conference seem moderator-dominated. Thus, organizers should consider using private e-mail to make constructive comments, to ask a participant why they haven't contributed, or to defuse an argument. Private e-mail does not interfere with conference activity.

Summarizing

Providing summaries is another important organizer function. This helps current participants to quickly understand what has transpired while helping new participants catch up on discussions.

Keeping Things Going

Because computer conferences can extend over long time periods, there are two important maintenance operations. One is to bring in new material to help freshen up conferences. Consider bringing in material from other sources (including from other conferences). The second is to houseclean occasionally by deleting dormant items and keeping subject categories up to date.

3.2 Managing Discussion Topics

How Many Items, How Structured the Conference?

Some conferences have a very well-defined and detailed agenda which should be set by the organizer in advance. For example, a group working on a task (e.g., a new marketing strategy), a course conference, or a committee established to discuss a new program might have specific topics they need to discuss. In these instances the items may be known in advance and the conference structure may be rigid. However, in conferences with more general topics (e.g., office morale, micros or music), it may not be possible, or even desirable, to do this. For open conferences, it is suggested that the initial topic structure consist of a few general items. More specific items typically emerge from those general discussions, and there may be hundreds of items in conferences of a long duration.

Item Drift

An important moderator function deals with what is called "item drift." This occurs when people stray from the topic of an item. You might want to gently (sometimes not so gently) remind "drifters" to return to the topic. Conferences with significant item drift turn out to be "muddy" since the same topic may be discussed in many different items. Some drift is inevitable (do not be too heavy-handed), it is a matter of degree. In fact, participants sometimes signal they are drifting to make a digression (by saying "set drift on" and "set drift off"), indicating that others should not follow their lead. If the drift is significant and raises issues or covers topics not addressed in other items, a new item may be warranted.

Grouping Items Into Subject Categories

Caucus provides the capacity for organizers to group items under subjects. This is an extremely important

organizer function, especially in large, open conferences and those of long duration. Like items, these might be thought out in advance and grouped under these headings as they are added. In some conferences with no set agenda, they are likely to develop as the conference progresses. It would also be helpful for you to notify participants of the subjects' existence and explain how to access items by subject categories.

Private E-Mail vs. Public Responses to Items

A conferencing system is designed to facilitate group discussions. Private e-mail would, therefore, seem antithetical to this purpose. Nevertheless, e-mail can serve many useful functions. As in face-to-face discussions, there are some things better said in private. Some communications are simply more appropriate for another individual or subset of the entire group. It is suggested that as much of the communication as possible be conducted in the conference itself (it would not be much of a conference otherwise), while recognizing the need for private communications. The presence of extensive private communication between some people could suggest the need for another conference for those members. For more information on e-mail, see chapter 5.

4. Participant Restrictions

4.1 Adding Items

Typically, conference participants are permitted to add their own items. There are, however, circumstances in which this may be undesirable. This is especially true in newly organized conferences, when it may be beneficial for the organizer to maintain control of the topics and/or the order in which they are discussed. There may even be conferences where the organizer wants to completely control the conference items, such as in computer-mediated business meetings and, in educational settings, course conferences. Once conferences have matured, an organizer may wish to relax this restriction. Note that open conferences would probably not survive this restriction for very long.

4.2 Altering Previously Entered Conference Material

Unless you decide otherwise, participants are permitted to change (i.e., edit, replace, or delete) material they have previously entered (items or responses). This is useful when, in retrospect, they are not content with something they have said. However, there may be circumstances when allowing such changes would be inappropriate. For example, in a group working on a sensitive topic, retrospective changes could significantly alter the context in which subsequent remarks are embedded, changing their meaning entirely. It is suggested that restricting the right to make such changes should be used with caution and only with the consent of the participants. Of course, you can always reverse the restriction. Restricting changes is ordinarily not appropriate for public conferences.

4.3 Names: Real and Pseudo

Except for duplications of names already registered, participants can select any name they desire. Thus, pseudonyms are possible and can be used creatively. For example, names can be used for role-playing, or groups of individuals can select similar names for simulations. However, under some circumstances they may be inappropriate, as in business settings or in course conferences where it is necessary to track participation. Furthermore, pseudonyms should be used responsibly and not to harm or impersonate other conference members. Remember, the identity of the author of any item or response can be discovered despite the use of pseudonyms.

5. Etiquette and Rules

5.1 Remedies for Violations

Organizers of open conferences need to be especially sensitive to objectionable content. After all, participants' comments are available to anyone with access to your Caucus system. The same basic guidelines that apply to free speech using any other medium apply here as well. There are two minimal rules that should be adhered to in all public conferences: no vulgar language and no personal attacks.

There are several ways to handle problems:

* Delete any offensive material (items or responses).

* Ask the person to apologize for offensive remarks.

* Send a private e-mail or speak directly to the participant involved.

* Publicly chastise the participants in the conference.

* Exclude members from the conference and/or system if necessary.

5.2 Confidentiality

Confidentiality is frequently an issue any time people communicate. However, since computer conferencing creates an instant transcript, breaches of confidentiality become markedly simplified: it is relatively simple to print material, copy it to another conference, or publish it in some other fashion. Thus, computer conferencing provides a greater potential for abuse.

It is typically assumed that conference material is intended only for other participants. Reproducing that material for wider distribution would violate that assumption. However, if material in a conference is of a particularly sensitive nature, you might wish to:

* Discuss the issue of confidentially with participants

* Place a notice in the introduction and/or greeting about the confidentiality policy

* Suggest that persons who specifically wish should emphasize confidentiality in their communications

6. Winding Down

6.1 Archiving Your Conferences

Keeping a permanent record of a conference is highly recommended. This is especially true for course and special purpose conferences that you may wish to review after they have ceased to exist. One option is to print a hard copy. Another is to write the conference to a file (see print and file transfer commands, in the Caucus 2.0 User's Guide.)

6.2 Terminating Conferences

Open conferences run continuously but are typically restarted periodically (with much advance notification to participants) to conserve computer resources. Conferences established for specific purposes (e.g., task groups) have a definite life. In educational settings, course conferences normally terminate when the term closes. Other special conferences may be indeterminate. In each case, the organizer should notify the conferencing system coordinator when to terminate the conference.

7. Course Conferencing In Educational Settings

7.1 Why Course Conferences?

In course conferencing, a class is provided with one or more of its own closed conferences. When used with on-campus classes, add communication possibilities beyond those which normally exists. Course conferencing also can be used to teach complete courses by computer-mediated communications (known as virtual classrooms).

By opening up additional communication channels, conferencing can increase access between instructors and students, and among students. Conferencing also has the potential to significantly increase the amount of writing by students, even in courses where writing is neither an essential nor even a minor component. Parenthetically, using conferencing helps satisfy two goals which colleges and universities typically attempt to foster among their students: familiarity with computers and increased written communication.

7.2 Important Benefits for Classes and Students

* Students can become more familiar with their classmates and instructors.

* Instructors can post assignments in the conference - using it as a bulletin board.

* Unresolved class discussions can be continued in the course conference.

* Students can communicate with each other and their instructor outside of class without having to coordinate their schedules. Electronic "office hours" are very efficient.

* Unlike class discussions, a written record is maintained and available for later review by both students and instructors.

* Students have time to think before they respond to what others have said.

* Students can enter and edit their remarks without taking up each other's time.

* Instructors and students can engage in many simultaneous discussions and private conversations without interference with each other.

* Students can get rapid response to their ideas.

* Students who might rarely or never speak in class are more likely to contribute in a conference.

* Aggressive students are less likely to dominate discussions as they might during class.

7.3 Some General Considerations

It is important to recognize that communicating via computer and conferencing are probably new experiences to many, if not most, students. Therefore, an introduction in class to the general principles of both is important prior to any workshops or other hands on experience. Equally important is that students understand why conferencing is being included in the course. Indicate how much you expect them to participate. Also, clarify for students the use of private e-mail.

While this information also may be presented and discussed in the conference itself, creating a context for conferencing can go a long way toward allaying anxieties that accompany this experience. As conferencing becomes more common, such introductions will probably cease to be as necessary.

7.4 Suggestions for Items and Uses of the Conference

Here are some specific ways of using a course conference:

* Follow up unfinished or unresolved class discussions by continuing them in the conference.

* Enter items to discuss major issues and concepts in the course. These need not be in place when the course begins but may be added as the course progresses. The more provocative and challenging the better.

* Use the conference to receive feedback on lectures and assignments.

* Make specific assignments in the conference during the course. Post assignments you are contemplating and ask students for input before assignments are finalized.

* Use the conference to post exam keys and answers and to discuss exams. Considerable time and energy is saved when everyone in the course can partake in these discussions -especially students who may be absent when the exam is discussed.

* Consider inviting "outside experts" to your conference to enrich the course. They could be other faculty and staff or off - campus experts. Note that special arrangements would have to be made for the latter - they can be given special Caucus accounts (i.e captive accounts).

* Consider a simulation. Set up a situation in which class members take certain roles. This can be a major use

of conferencing. For example, business courses might simulate communications between managers and employees. A course could have an additional conference established for the students for this purpose.

* Written work could be entered in a conference and "critiqued" by other class members. Text can be entered and revised by others, and the class would have a record of successive revisions.

* Divide the class and have an extended "debate" on an issue. The conferencing medium gives the debaters more time to consider their responses and perhaps consult resources.

* Conduct polls on specific issues.

7.5 Additional Considerations and Suggestions

Here are some further issues to consider when using course conferences:

* As noted earlier, conferences may be set up so that only the organizer can enter items. It is strongly suggested that this be done at the beginning of the term. This restriction can be relaxed once students have more experience with the course and with conferencing.

* Consider whether conferencing should be a required or voluntary activity. Especially if required, consider further the degree of access that students will have to the timesharing system (i.e. computer terminals or microcomputers with communications capability). For example, commuting students, especially those on campus only in the evening, would have less time to conference than on-campus residents.

* Use the conference for small group projects. It is possible to establish additional closed conferences for this purpose. The instructors can be a consultant to several group projects efficiently if s/he is a member of each project's conference.

* Consider storing text material you plan to use frequently in computer files. This material can then be imported into the conference as needed. For example, a newspaper article which might be the stimulus for a discussion could be typed into a file in your area. The article is then available for the class whenever you desire, e.g., by making it an item. Having several files available gives you an on-line course-pack. Computer files could even be shared among colleagues.

* Students should have introductory hardcopy material about conferencing.

* Workshops can be set up and made available at the beginning of each term to teach new students and faculty how to use Caucus computer conferencing - an instructor who plans on using conferencing extensively may want to arrange to have a workshop for the first scheduled class meeting.

* Ask students who are familiar with conferencing to act as tutors to others.

* Perhaps the most general statement about moderating a course conference is: treat it as you would the class itself. That is, guide but do not dominate. Do not think that you have to answer every question that arises. Give students a chance to "talk", or they will just read. Enter items gradually so as not to overwhelm students.

* Finally, students will only use conferencing if there is a reason for doing so. While you can make conferencing mandatory, that could engender some resistance. Instead, suggest guidelines, such as checking in on the conference at least three or four times per week. Voluntary conferencing can be successful if:

- important information exists on the conference

- conference discussions are truly interesting

- there are some purely entertaining or social items as well as "serious" topics

- conferencing is undertaken in a relaxed atmosphere

- students feel free to ask for help with the system

7.6 Evaluating Conferencing Activity

An important advantage of course conferencing is the capacity to effectively evaluate students' contributions to discussions. This can be done either by scrolling through the items on your terminal or computer screen, or by printing the conference (see print commands).

The way to evaluate contributions depends on your course objectives and expectations for conference participation. Here are some typical conferencing standards:

Have Students Accessed the Conference and Its Items?

At the very least, students might be expected to read the material in the conference. Caucus permits checking on the items and responses that students have displayed. If this is done once per week, a record could be kept and referred to at the end of the term.

Minimal Responding

A second level requires that students join the conference and contribute to some or all of the items. This could be checked by examining the conference transcript. By using the information tagged to each response one could determine whether these contributions occurred during a specific time interval, say once per week.

Beyond the Minimum

Levels of contribution beyond these minima can be gauged only by closer examination of the conference transcript. One criterion is response length. Although as with any other contribution this may not be the best measure, it can be used as a rough index of student participation. One suggestion is to use three levels, something like terse, average, and extensive. A one-line response may indicate the student's participation but not much else. Two or three sentences is usually enough to justify more extensive interaction, while a ten-line response may signify extensive participation.

Content Analysis

How incisive and meaningful students' contributions to discussions are can be only determined by carefully examining an entire course transcript. How one does this depends, again, on one's course objectives. As with any grading scheme the metric can range from global to fine-grain, from acceptable vs. unacceptable to a specific letter grade (complete with + and -). The advantage of having the complete conference transcript over attempting to do this with in-class participation should be obvious. Instructors who repeat courses have the additional advantage of making between-term comparisons.

8. Helpful Hints

Here are some additional suggestions that others have found useful:

Foreign Language Conferencing

It is possible to conduct conferences in languages other than English by adopting text conventions. The creative use of punctuation marks and symbols can substitute for many accents. The greeting or first conference item should be used to establish the conventions.

Indexing With Creative Item Titles

Items can be selected in database fashion with the judicious use of item titles. Suppose there are several working groups producing several versions of documents in one conference. If each group's document was entered as a separate item that carried the group (e.g.,G1) and version number (e.g.,V1) the **list some items** link from the conference home page could be used to show all documents for group 1. Other standard information contained in item titles would be similarly searchable.

9. Important Organizer Features

9.1 Conference Membership

Each conference maintains a userlist which controls who has membership privileges. This list can be edited from the **customize** link on the conference home page (or the "Customize USERLIST" command in the text interface.)

Completely Open Conferences

A completely open conference should have a colon (:) followed by the word "include" as the first line in the file and no other text. The second line should contain an asterisk (*). Therefore, the file would look like this:

```
:include

*
```

Restricted Conferences

To specify a list of permitted participants, the asterisk should be replaced by their user IDs. The following userlist specifies three faculty members and a student (fox).

```
:include

psy_karabeni

csc_remmers

ori_young

fox
```

Use of "Wild Cards"

To specify a group of participants with a common account name, such as a set of course accounts, enter the common element, then an asterisk which is called a "wild card". The following userlist would permit a faculty member and all students in his chemistry class. Student IDs would all begin with the course prefix, then their student number (e.g., chm610566475). The common element is chm610.

```
:include

chm_ramsay

chm610*
```

Excluding or Limiting Participants

Participants are excluded by listing their account names, following a line which reads ":exclude." In addition, participants can be limited to only being able to read (not contribute to) material by listing their account names following a line which reads ":readonly". The following userlist would permit all faculty members in a department to participate, give an invited guest (gendin) permission to read the discussions, and exclude one department member (orloff) from accessing the conference at all.

```
:include

psy_*

:readonly''

phi_gendin

:exclude''

psy_orloff
```

9.2 Customizing Conference Characteristics

Customize the Introduction

The conference introduction may also be edited from the "customize conference" page. Modify it to suit your needs for the particular confernce. For example:

```
Welcome to the Music conference.  Its purpose is to discuss all facets of the musical scene, both
classical and contemporary.  We welcome membership and participants.
```

Customize the Greeting

The greeting appears every time a person sees the conference home page. As with the introduction, text already exists upon the conference's creation. Modify it as you see fit. An example:

```
Note that the items in Music are in organized by categories, according to their title.  To see these
categories and the items under each, click on list some items, and then pull down the menu bar to
"by words in title". See item 26 for a discussion of the next assignment.
```

Allow users to add new items?

The organizer may instruct Caucus to permit or deny conference participants the right to add their own items. The default is to permit adding items.

Allow users to edit their own responses?

Caucus gives the organizer the option of not permitting participants to alter, replace, or delete the text of items and responses they have entered. The default setting permits such changes.

Screen Porch: *CML Reference Guide*

This document is the reference guide for CML, the Caucus Markup Language. It assumes some familiarity with HTML, the World Wide Web, Web browsers, and the concept of a conferencing system.

● **Caucus 3.1.1 CML Reference Guide.**
Download the RTF (Rich Text Format) file, which is readable by most word processors.

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◀ Screen Porch: *Virtual Hosts & Caucus* ▶

This page describes how to use WWW "Virtual Hosting" in combination with <u>Caucus</u>, to supply different Caucus interfaces for different virtual hosts on a single host computer.

"Virtual Hosting" is a feature of the <u>Apache</u> httpd server (and possibly others). It provides a way to make a single host computer look like different, multiple, hosts. Each such "virtual" host, when accessed through a web browser, has its own distinct web document tree.

Each of those virtual hosts can also have its own distinct Caucus interface, as well. And yet the virtual hosts will share the same installation of Caucus, and potentially the same set of conferences.

The rest of this page describes, by example, how to implement this. This discussion assumes basic familiarity with the Apache httpd server, and experience installing Caucus on a single web host.

Section I: Virtual host setup.

Assume two hostnames, "gamgee.host.edu", and "frodo.host.edu", both of which point to the same machine (originally called "original.host.edu"). The httpd server is installed in the directory `/caucus/HTTPD`.

To implement virtual hosting in the httpd server, modify the httpd server configuration file httpd.conf to include these entries for the two virtual hosts:

```
<VirtualHost gamgee.host.edu>
DocumentRoot /caucus/HTTPD/GAMGEE
ServerName   gamgee.host.edu
</VirtualHost>

<VirtualHost frodo.host.edu>
DocumentRoot /caucus/HTTPD/FRODO
ServerName   frodo.host.edu
</VirtualHost>
```

Make sure to remove any other definitions of DocumentRoot and ServerName elsewhere in the configuration file(s).

Note that each virtual host has its own document tree, in `/caucus/HTTPD/GAMGEE`, and `/caucus/HTTPD/FRODO`, respectively.

Section II: HTML files for starting Caucus

Assume that Caucus is already installed in `/caucus`, and that it is just being modified to allow virtual hosting.

Further, assume that the virtual hosts are **only** used for Caucus, so the DocumentRoot

index.html files for each virtual host can take the user's browser right into Caucus.

The principle here is really quite simple. Starting at the top (the browser's entry point into each virtual host), replace all links to the generic host, with links to specific URLs **or CGI files** that reference the desired virtual host. Continue following the chain of links and CGI files until the CML files also point to the correct hosts.

Start by copying

```
/caucus/public_html/caucus.html  to
/caucus/HTTPD/GAMGEE/index.html,
```

and likewise for FRODO.

Edit the link in the index.html file to point to the appropriate host and unique CGI files. For example, in GAMGEE's index.html file, the lines:

```
If you already have a userid and password, go to the
<A HREF="http://original.host.edu/sweb/caucus.cgi">
Caucus Welcome Page</A>.
```

are changed to reference

```
<A HREF="http://gamgee.host.edu/sweb/gamgee.cgi">
```

Do the equivalent change for FRODO's index.html file.

If the virtual hosts should have self-registration of Caucus userids, make the equivalent changes for that link as well, in FRODO and GAMGEE's index.html files.

Section III: CGI files for starting Caucus

The HTML files in the previous section referenced (new) unique CGI files for starting Caucus. Now create them. Copy

```
/caucus/SWEB/caucus.cgi  to
/caucus/SWEB/gamgee.cgi
```

Edit gamgee.cgi, and change:

```
echo "Location: http://original.host.edu/sweb/swebstart.cgi/SP/Local/start.cml"
```

to

```
echo "Location: http://gamgee.host.edu/sweb/swebstart.cgi/GAMGEE/Local/start.cml"
```

Note that this assumes the creation of a separate set of Caucus interface files under `/caucus/CML/GAMGEE`, to replace the default `/caucus/CML/SP` directory.

Make the equivalent changes for `/caucus/SWEB/frodo.cgi`, and (if self-registration is allowed), `/caucus/REG/gamgee.cgi` and `/caucus/REG/frodo.cgi`.

Section IV: CML files for each virtual host's interface

Finally, create the actual new interfaces for each virtual host. Copy **all** of the files (and directories) under `/caucus/CML/SP` to a new directory, called `/caucus/CML/GAMGEE`.

Then edit `/caucus/CML/GAMGEE/Local/start.cml`, and change:

```
set dir    SP
```

to

```
set dir      GAMGEE
```

and

```
set href     http://$host()/sweb/swebt.cgi/$pid()/$(dir)
```

to

```
set href     http://gamgee.host.edu/sweb/swebt.cgi/$pid()/$(dir)
```

Make the equivalent changes for `/caucus/CML/FRODO`.

If self-registration is allowed, create duplicates of the `/caucus/CML/REG` directory, perhaps REGF (for FRODO) and REGG (for GAMGEE). In those directories, make the same changes as shown above, in the respective register.cml file(s).

That's It!

Presumably some other aspect of GAMGEE's or FRODO's CML interface files will also be changed (otherwise, why have different interfaces in the first place?).

Instructions for performing common interface modifications (such as changing the Caucus logo, or the page background) can be found in the Caucus Installation Guide.

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Screen Porch: *Caucus™ 3.1 Trial Version*

The Caucus 3.1 evaluation program allows you to download a fully-functional trial version of Caucus, including all features and documentation of our shipping software. Your trial version will cease functioning 30 days after installation.

Before registering to download this trial version of Caucus, please read the Caucus Specifications, to familiarize yourself with the Web server environment required for Caucus to run.

Your evaluation software expires 30 days after installation. After this time, you must purchase Caucus to continue using it on your Web server. Each organization or individual is allowed only one evaluation download, and using the evaluation version requires that you assent to the same Software License Agreement that covers the commercial version.

Caucus is currently supported on the following platforms:

- AIX 4.1
- BSDI 2.1
- DEC UNIX (OSF/1 v3.2)
- HP-UX A.09.04
- IRIX 5.3
- Linux 1.2.13
- Solaris 2.4
- SunOS 4.1

Note: Caucus is upward-compatible with newer versions of these platforms and operating systems. (That means, for example, that Caucus for Solaris 2.4 will also run on Solaris 2.5.)

If you are interested in using Caucus on a different platform, please tell us about it.

Now that you've read and understood all these important issues, please register for your free evaluation software.

[**Welcome** | **Caucus Specifications** | **License Agreement** | **Register**]

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◀ Screen Porch: *Caucus™ 3.1* ▶

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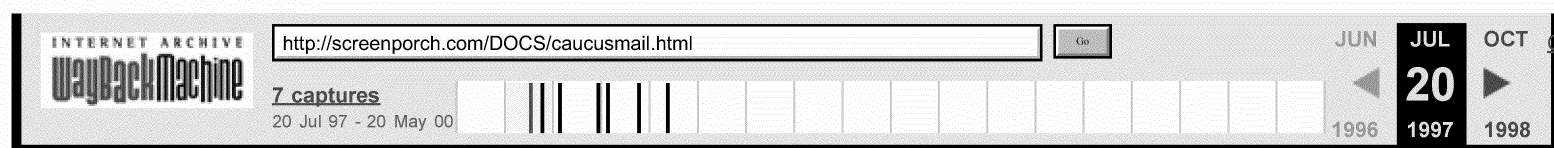
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Caucus E-mail Interface
Installation and Usage Guide

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Last Revised: 16 December 1996

1. INTRODUCTION AND PURPOSE

The Caucus e-mail interface package adds a "listserv" or mailing-list like capability to the existing Caucus conferencing system.

With this optional package, you can extend the use of your Caucus conferencing system to people who have only e-mail access to the Internet.

When this package is installed and enabled, each Caucus conference organizer can specify a list of e-mail addresses that may participate in that conference. New material (items and responses) are automatically sent to those participants, via e-mail, on a regular basis.

Those users may in turn contribute to the conference by simply replying to those messages. The replies are automatically placed in the proper conference and item.

2. INSTALLATION

2.1 E-mail Kit Contents.

The Caucus E-mail link kit is contained in a file called "email.tar" that may be downloaded directly from the Screen Porch web site, at http://screenporch.com/MODULES/email.tar.

The email.tar file contains this README file, the 'einstall' installation script, and a compressed kit file, kit.t.Z.

2.2 Create the Caucus Mailer userid ("caumail").

Create a Unix userid that is dedicated to handling the e-mail for this interface. (The 'root' user or system administrator must do this.)   A good name for this userid is "caumail", although any userid will work. (Do not use the regular "caucus" userid for this account. This must be a separate userid that is only used for this purpose.)

This userid must be able to use the Unix 'crontab' utility.

2.3 Install the software.

Login to the id you created in step 2.2. Do NOT install the software as root! Download or copy the email.tar file to the home directory of that id. Type:

```
tar xvf email.tar
./einstall
```

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Follow the instructions that are displayed.

Initially the e-mail updates will be sent out once per day. This may be changed by examining and modifying the contents of the "crontab" listing for this userid.

2.4 Connect the e-mail link to Caucus.

To finish the installation, you must "connect" the Caucus e-mail link software with your regular Caucus installation.

Login to the "caucus" userid. From this id, run the script called "copysweb" that is located in the Caucus Mailer userid's home directory. (For example, if the Caucus Mailer userid's home directory is /home/caumail, then type "/home/caumail/copysweb".)

Now edit the file CML/SP31/Local/switch.i, and change the definition of the "mail_out" variable to be the Caucus Mailer userid (for example, "caumail").

3. CONFERENCE ORGANIZER INSTRUCTIONS

To allow e-mail users to participate in a conference, the conference organizer must do two things from the "customize" page:

3.1 Include the Caucus Mailer userid in your conference.

Add the Caucus Mailer userid from step 2.2 to the list of users included in your conference. This only needs to be done once.

3.2 Add individual e-mail users.

For each e-mail user that is participating, add their e-mail address to the "Section IV: E-mail participants" box at the bottom of the customize page.

Note that this must be the address that appears on mail sent **from** the user. Caucus uses the entries in the E-mail participants box for two purposes: to determine who to send mail **to**, and to control who mail will be accepted **from**.

This is somewhat subtle point. A person with simple "mail to" address may actually have a longer "from" address. You **must** use the "from" address. (Some people may also have multiple e-mail aliases that all point to their "real" e-mail address. In either case, you must always use the "from" address that appears in their replies.)

To remove an e-mail participant, simply delete their address from the box. (There is no way to "rename" an e-mail participant to another e-mail address.)

4. E-MAIL PARTICIPANT INSTRUCTIONS

When an e-mail participant is added to a conference (in step 3.2), they will receive the entire contents of the conference as e-mail. Each item will appear (with all of its responses) as one message. The subject heading of the message begins with "::Caucus", and then shows the conference name, item number, response numbers, and item title.

Thereafter, as new items and responses are added to the conference, e-mail participants will receive regular updates (typically daily). All new responses to an item will be delivered as one message. Each new item (with its responses so far) will be delivered as one message.

An e-mail participant may add a response by simply replying to the appropriate message. A reply to a particular message will be posted as a response to that item.

E-mail participants may post HTML responses, by making the first word of their response be "<HTML>". (It must be followed by a space or a return.)

E-mail participants may post new items by replying to any message (from the relevant conference), and changing the subject field to remove the item and response numbers. (I.e., the subject field should just contain the "::Caucus" and the conference name.) On most mailers, this can easily be accomplished by simply backspacing over the subject until the conference name is reached.

The first line of the message will be used as the item title. If the first word of the title is "<HTML>", then the entire item text will be treated as HTML.

5. APPEARANCE OF E-MAIL POSTINGS IN A CONFERENCE

Items and responses posted by e-mail participants look just the same as entries made by regular Caucus users.

The only exception is the name of the participant. The name will appear as plain text, typically followed by their e-mail address, shown "blued" as a link. (Since Caucus doesn't know anything else about them, only the e-mail address is active.)

Conference organizers can delete or edit the participants' items or responses in the usual way.

6. POTENTIAL PROBLEMS

There is one known problem, having to do with e-mail replies.

For many mailers, when a user replies to an e-mail message, the content of the original message is made part of the reply, with a "> " before each line (to distinguish it from the reply proper).

The Caucus e-mail package understands this syntax, and strips all such lines from the text before adding it as a response.

However, some mailers use other methods of marking the lines from the "original text". As these methods are identified, those lines should also be stripped out! (Otherwise a potentially exponential growth may apply, as replies to replies to replies etc. get posted in the conference.)

See the section in the file import.cml in the Caucus e-mail package for more information about how to accomplish this stripping.