

These are some preliminary notes on Patrick O'Keefe's book *Managing Online Forums, Everything you need to know to create and run successful community discussion boards*. The headings are each the titles for sections. In each case I have tried to select points when the author 1) made definitional claims 2) made statements about what community is 3) described roles that people take 4) explained techniques for shaping or controlling discussion 5) characterizations of what happens in forums. I have taken these notes in linear order, collecting direct quotes and noting pages and taking notes alongside those quotes. I have kept the chapter headings as headings in this document. Throughout I have highlighted some of the features that I felt were particularly interesting in different colors.

Foreword

"Community is the cornerstone of our civilization. So it should come as no surprise that the World Wide Web has exploded into communities, large and small. While they may vary in every conceivable way, at their core, each one is just a gathering of people sitting around a campfire, telling each other stories." xvii

"You are giving people a place to meet and connect, share their ideas and thoughts, and build relationships that grow out of common experiences. Building a community is about creating a fun, safe place that encourages expression and conversation." xvii

Introduction

Kinds of people nature of relationships

"As the administrator, you are the person who has to lead the community, take it to the next level, make the tough decisions, take the heat, deal with the people, manage the staff, and keep the community running smoothly on all fronts." (1)

Extensive discussion of problem kinds of users

"Users are "customers" of your community. So, you often need to take somewhat of a customer-service approach to answering questions."

Community Definition

Comment [1]: Kim Sheridan:
I would characterize these as roles. "kinds of people" you may need as a later category for people's ideas about the different ways different aspects of individuality (e.g., a shy person, an argumentative person) affect a community

"The definition of *community* in this book is "community forums." This is a book about managing online community forums. So, when I say *community*, it means the same as *forums* and vice versa." p.4

Laying the Groundwork

Under the heading of "what will the benefits of your community be?"

"You can help people or provide them with useful information, you can provide a friendly atmosphere or an exclusive atmosphere, you can give them direct access to your company-- you can do a lot of things. (9)

Comment [2]: Kim Sheridan:
I find the dichotomies people set up as a fruitful source for insight into their thinking.

Under the heading of what skills you need:

"You need a great deal of patience. You'll be dealing with idiots and, if your site is large enough, plenty of them--people who will, quite frankly, love to and even want to cause trouble, upset you, or rattle your cage. Nasty messages? Venomous hatred? Get ready-- they are now part of your everyday life. You need to accept this, laugh it off, and stay on point." (15)

Comment [3]: Kim Sheridan:
Be careful not to code just into neutral buckets-- you'll want to also use in vivo codes like "dealing with idiots" and create a set of terms "nasty messages" "love to cause trouble" that define those in vivo codes.

Developing Your Community

Naming a community he says that picking a domain name with the ContentForums.com approach. ie Karateforums.com and sportsforums.net and photoshopforums.com "Usually, I prefer the *forums* moniker over others, but community, *talk*, *chat*, etc. can work just as well. (18)

He presents vBulletin and phpBB as the two example software platforms for running community sites.

Post Counts "A post count is a tally of the number of posts a user has made on your community. Usually this information will display next to the user's posts and on his or her profile page as well as in other potential locations." (27) "some care a little too much and try to boost it artificially."

Signatures and Avatars: "Signatures and avatars allow your members to express their individuality" (30)

User Titles and Ranks "based on the user's post count." 31

Comment [4]: Kim Sheridan:
I see this as key to your RQ: think about the writer's conception of the user's "needs/wants" e.g. express their individuality and then connect them to the tools they provide for this e.g. signatures and avatars. Coding in categories substantive to your research questions like this (in addition to your generic codes) will get you farther analytically. Also, remember the purpose isn't to code everything--you'll overwhelm yourself with data. Code a section that seems fruitful intensively to really push your thinking, and then use the codes you develop to come up with to strategies for broader analysis.

Developing Guidelines

An extensive set of suggestions for guidelines:

He wants to talk about guidelines instead of rules because guidelines “allow for some flexibility, some discretion. Rules are more likely to be enforced in a hard and fast manner, which can leave little room for interpretation” (59)

Includes information about signatures, and deciding if you want to allow images in signatures (73)

Talks about making rules against having multiple accounts (71) Gives examples of people creating fake conversations between themselves through two accounts to promote other sites.

Defining the needs for members to respect each other (69)

Guidelines about post-count boosting and bumping threads (62)

Guidelines about not posting in all caps (62)

Guidelines against advertising “I prefer to use the word *advertising* instead of *spamming*, as it seems a bit less inflammatory and accusatory.” (63)

Guidelines about cross-posting, duplicate threads, (61)

Managing Your Staff

“In most cases, they are volunteers and see no real form of monetary compensation.” (119)

“Your signature in your community should clearly identify at least who you are and what you positron is.” (119)

Under heading **The Chain of Command** he identifies a clear hierarchy where for larger sites it may make sense to use a clearer chain of command.

“Administrator (You) > Moderators > Guides (Powerless) > Users” (123)

“Moderators have moderator power. GUiDes are essentially powerless; their main goal is to spot threads and posts that violate your guidelines and use your report posts system to poin them out to moderators and you.” (123)

Example of from requirements for KarateForums.com “You must possess leadership capabilities, a good attitude, kind demeanor, good speaking and grammar skills (you must be able to communicate clearly in English), basic understanding of the features of the community software, the ability to stimulate discussion, distinguish a violation of our User Guidelines and aggressively moderate the community, work in a team environment, and finally, have pride in

your work and be dedicated to the success of KarateForums.com” (154) *Wow that is a lot to expect from your free labor!!!*

Banning users and dealing with chaos **Kinds of users**

Most of the advice in this section is actually about how to explain why you are banning someone, or how to engage in a conversation over private message with an individual who is creating a problem. There are technical tactics that emerge too (banning accounts, banning IPs, making it look like your site is unavailable, etc) but they are interwoven into what is primarily a set of recommendations for how to engage with people and frame responses.

Introtisements and Adverquestions Spammer/In authentic promotion/Self interest not interested in being a good community member (185) “Introduction posted in your community that appears to exist solely for the purpose of promoting something and/or sending users to another site.”

“ask a question in your community (sometimes on supoprt communities) but include some sort of link or thinly veiled marketing message that promotes or mentions something other that may not even be related to the question they are asking.”

Abusing Private Messages: Spammer/In authentic promotion/Self interest not interested in being a good community member (People sending mass private messages to everyone “whether it be advertising a website or calling you an idiot” 185 “To look into these matters and verify that it is happening, you need to be able to view the private messages that your members send in your community.”

Inflammatory comments: **Just being a bad neighbor** Micro\$oft/M\$ as an example of “inflammatory name substitution” “unnecessary, inflammatory comment.” 189 related “Greenday sucks!!!”

The Reply-to-Every-Post Guy “user who sets himself up as some sort of opinion judge (and jury). 193 **Just being a bad neighbor**

Freedom of speech “The belief that freedom of speech entitles people to say whatever they wish, whenever they wish, where they wish is one of the most common misconceptions and problem issues for community administrators”¹⁹³ Sour grapes, reactions to being normed

“You are so biased” ¹⁹⁴ or **“I’m Creating My Own YourSite.com”** Sour grapes, reactions to being normed

(197) **“Hate Him, My Minions, Hate Him!”** ¹⁹⁹ and **“Admin to Users: Attack”** (200) Both of these examples start to get into issues related to the kind of antics that people in the Thunderlord forums would do. Go take over someone Else's forums. *Think about talking to Dan about his experience with this.* Sour grapes, reactions to being normed

“Persistent Idiots” People that heckle you for over a year in a range of formats, Sour grapes, reactions to being normed

“Solutions” focuses on technical tweaks

In this section we get some discussion of technical twists to add to help manage.

- **post reporting system** Distributed Moderation, everybody helps flag content

he suggests adding a “report post button on every post and then make your site list the reports on a central page that only staff members are able to view.” ²⁰⁴ This gets your users to help play a role in policing the system.

- **“helpful notices”** Upfront expectation setting, pre-censorship

“You can help to curb the occurrence of repeat violations through the use of well-placed, helpful notices to remind people to watch what they are doing.” ²⁰⁵ Gives examples of putting a red colored notice above the text box reminding people of particularly important rules, for example about posting in the right forum. In the same vein, he mentions another site which tells members posting in an old thread that “the thread is X months old and that he might want to consider creating a new thread instead.”

- **Innovative Tools:** *This section is primarily about setting up automated systems to manage interaction.*

Only one post bump, and only after 48 hrs Automating Moderation tasks

“At phpBBHacks.com, we have a fairly strict guideline in place in regard to the bumping of support topics. Users are only allowed one noninformative bump (i.e., a post that adds no new information to the thread), and it must come after forty-eight hours after the last activity on the thread in question.

With the site being as active as it is, we had to remove quite a number of posts for bumping. I was thinking about how we could more effectively handle this and I had an idea. I wanted a hack that would check to see if the person adding a reply was the thread starter and had made the last post on the thread. If both of those things were true and the last activity on the thread was within the last forty-eight hours, the post would not go through and this message would display:”

The message tells them they can only do one non-informative bump per thread, and only after forty-eight hours. Then tells them to edit the existing post if they need to.

“I’m not simply for automation. I’m for automation that works, helps you to do your job better, and helps your community.” (206)

Word Censor and highlighter combo: Auto censorship

He runs software that will not allow people to post comments that contain certain words, this is a list that he himself manages. He describes how he decided instead of simply not posting the message it should run in advance and highlight what part of the message was triggering the software thus providing the user the ability to rewrite their comments. “What if the community software explained why and even highlighted the sections of the posts where the violations occurred, allowing users to make adjustments without losing their posts” (207)

Banning:

He starts by talking about how you should give everyone a chance, how you should give out warnings either in discussion threads where they were creating problems or in a private message. He lists a series of different kinds of things you might ban someone over, mostly things he has already laid out as problems with added bits about the frequency at which someone continues to do these problem behaviors.

He then talks about a few different kinds of bans

-Banning Usernames “the most basic type of ban.” (211)

-Temporary Bans “used as a bit of a cooling-off period or a time out. I don’t recommend it.”

-Banning IPs *He talks about how in some cases when you check the logs for where a user posts from you may be able to ban that IP or IP range to solve a problem. However he notes that one needs to be careful because it could block other users who use that IP.*

Get Creative "Creativity never hurts when you're trying to get majorleague idiots off your community." *This section explains a series of technical tricks an administrator can use to get banned*

"You could make it so that a 404 (not found) page displays when a specific IP visits your site) *He mentions that cPanel lets you use an IP Deny Manager to do that or that you can use a .htaccess file to do this*

Make It So That Only They Can See Their Posts (Global Ignore) (214) *Change the site experience for individual users*

Simulated Downtime *The Miserable Users hack for vBulletin and Troll hack for phpBB* *Change the site experience for individual users*

Automated Banning and Point-Based Systems: He is not a big fan of this, but he lays out how you can do it. His issue is that it removes the amount of discretion the administrators and staff put into things.

Creating a Good Environment

"Respect is the cornerstone of a good environment. You create a respectful community by requiring that everyone treat everyone else with the respect they deserve. You do this by having written policies and by actively enforcing those policies." (219)

"Users are "customers" of your community, So you often need to take somewhat of a customer-service approach to answering questions." (221) *Roles*

"As I said earlier, users are your customers. Their time is there currency."

Reviews of the book: Matt Paddock a Community Manager/Project

<http://www.goodreads.com/book/show/2859657-managing-online-forums>

"At times this went too deep into the quibbles of forum denizens and the *author seemed to be a bit obsessed with governance.* Governance is important, but his suggestions came off *a bit*

autocratic at times. Beyond those issues, this book is a practical guide to setting up an entire community, not just forums as the title suggests.”