



Jive Interactive Intranet

## 9.x Administrator Guide

### Community Administration

# Notices

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For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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# Aurea global support

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- Search the articles on the [Aurea Knowledge Base](#) for solutions to your issues.
- Search the product documentation and other product-related information that are also available on [Support Central](#).

If you still cannot find a solution, open a ticket on [Aurea Support Central](#). Information about the support organization is available on [Support Portal](#) as well.

You can also find the setup files on [Support Portal](#).

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our [website](#).

# 1

## Administering the Community

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*Learn how to configure your community, including settings related to content and people, remote connections, and customizations.*

For details, see the following topics:

- [Getting started](#)
- [Setting up community](#)
- [Configuring community](#)
- [Managing community](#)

### Getting started

*In this section, you can find the basic steps required to set up a Jive community. The configuration details, advanced settings, and management tasks are provided in the [Configuring community](#) on page 31 and [Managing community](#) on page 270 sections.*

#### Admin Console and user interface

The user interface is what users see when they login to the community and then browse the community. It is accessible to any user who logs in to the community.

The Admin Console consolidates most of the configuration options of any Jive community. It is accessed from the user interface, but only users with permissions to update the community settings can access the Admin Console.

#### User accounts

One of the main tasks is allowing user access to the community and filling in their profile information.

**Jive-based users** By default, Jive uses its own identity management system to store the user data. In this case, each user account is created manually by the administrator or users create their own accounts. The profile fields are filled in manually.

**Users in a central corporate system** Corporate systems can store all user accounts for everyone in the company, allowing users to remember only a single user name and password to access all systems. Depending on the system setup, Jive supports several authentication types allowing single sign-on (SSO) or automatic synchronization of user accounts, or both.

## Community theme

The Theming tool allows you to add the critical brand elements and configure the look and feel of your Jive instance. It applies the changes throughout your community environment and across all pages. Some of the elements which the Theme tool enables you to create or configure include:

- Your company logo
- Background colors
- Text and font appearance
- Main navigation menu

## Community places

A place in Jive is essentially a container that houses all the collaborative content for a particular subject or team. There are three types of places: **Spaces**, **Groups**, and **Projects**. For more information, see [Jive places: spaces, groups, and projects](#).

## News stream

The News page features a variety of streams that are designed to direct users to content, people, and places that pertain those uses directly. For more information, see [Customizing News page](#) on page 31.

## Home page

The Home page is an optional page that can be configured to host a variety of widgets. For more information, see [Designing Home page of your community](#) on page 43.

## Permissions

Before you invite users to your community, you need to decide what designated groups of users can do in certain spaces based on their assigned permission level. Note that administrators set up permissions for spaces and projects; the group administrators manage social group permissions. For more information, see [Managing user accounts and user groups](#) on page 401.

# Setting up community

You have several options for customizing the look and feel of your community.

This section introduces the basic configuration that is required to start using your Jive community site. You can find the detailed descriptions in the [Configuring community](#) on page 31 and [Managing community](#) on page 270 sections of this guide.



## Setting up your profile

One of the first things you do as the community manager or administrator is setting up your user profile. By adding profile information, you create an example for other new users.

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**Fastpath: User interface: Your Avatar (in the upper right corner) > Edit Profile**

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- Add a photo to be displayed on your profile page. This can be anything, but it's best to pick something that looks like you.
- Pick an avatar, which is the little image that is displayed next to items you are associated with, such as the content you create. Note that some images look better than others in small size.
- Add information about yourself. People are able to find yours and other profiles when they search for keywords, so it is a good idea to use words in your biography and expertise sections that people might search for.

For more information on setting up user profiles, see [Set up your profile](#) in the User Guide.

## Starting Admin Console

The Admin Console is an administration interface used to control and manage the Jive community site. As a community manager or administrator, you can access the Admin Console to manage your Jive community settings, permissions, content (such as documents, discussions, and blogs), and people.

- To open the Admin Console from your community, click your avatar in the upper right corner of the page and select **Admin Console** from the menu.
- To return to the user interface of your community, click **View Site** in the main menu.

## Creating community structure

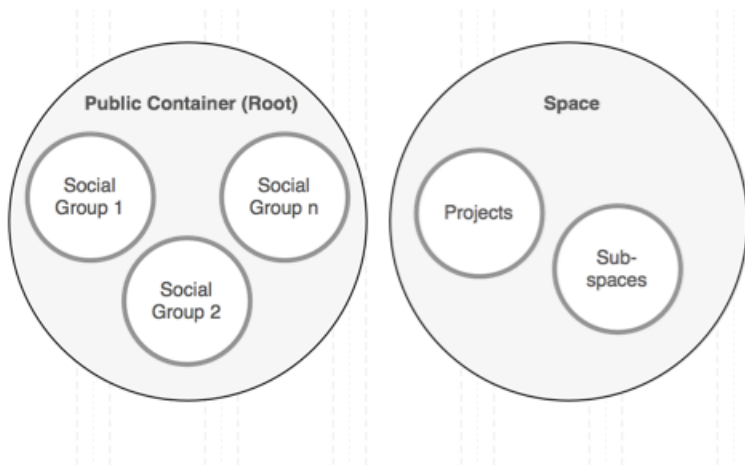
Creating a structure for content is one of the most important things you do to get your community started. Because people post content in various places, the places you create should help your users intuitively understand where to post (and find) content.

For example, you might organize the spaces to reflect the organization of the company itself including spaces like HR, Accounting, and Research.

A couple of things to note about how groups and spaces work:

- Social groups are contained by the root community space, but other than that, they do not have a hierarchical structure. Consequently, groups cannot be created inside a different space or under another group.
- Spaces contain any associated sub-spaces and projects (if you have them enabled). You may find this ability to create hierarchical spaces and sub-spaces useful depending on your needs.

You can think of it this way:



It is especially important when you are setting up things like moderation and permissions in places because of inheritance relationships. Social groups inherit from the root space, while projects and sub-spaces inherit from their parent space. The settings inherited at the time of creation are used as a starting point but can be modified later.

For more information about creating spaces, see [Designing space hierarchies](#) on page 350 and [Creating new space from Admin Console](#) on page 353.

## Jive places: spaces, groups, and projects

A place in Jive is essentially a container that houses all the collaborative content for a certain subject or team. There are three types of places: **Spaces**, **Groups**,

and **Projects**. The differences between them can sometimes be confusing, so here're the basics of each one.

## Spaces

*Spaces* are built in a hierarchy, with the ability to have a network of multi-level sub-spaces underneath them. They also use permissions, set by community administrators, to define who can see and do different things in the space. Permissions get inherited by any sub-spaces unless they are customized for that space, so if a user can do something in one space, this user can do it in the sub-spaces as well (unless the permissions have been customized). Any type of content can be created in a space, unless it has been turned off for a particular space by community administrators. Due to their hierarchical nature, spaces are typically used to represent organizations and departments within a company, and other concepts that require a network of places linked together.

For more information about creating spaces, see [Designing space hierarchies](#) on page 350 and [Creating new space from Admin Console](#) on page 353.

## Social groups

*Groups*, or *social groups*, are isolated containers within a community; they have no ties to other places and cannot have sub-groups. Permissions are managed on a per-group basis by the original group creator or the admins selected for the group, or both. Groups can also house any type of content unless one or more is turned off by community administrators. Because they are a freely created containers, groups get used most often for topic-specific collaboration, rather than something general to a team. They also get used for collaboration between specific teams or different departments that often work together closely and rely on each other.

## Projects

*Projects* can only reside within a space or a group; they cannot stand alone. However, they can still house any type of content unless one or more is turned off by community administrators. Permissions get inherited from the place in which the project was created. Projects also get created with a Start Date and an End Date and come with additional titles on their pages that display the progress being made in the project (if the project administrator keeps them up to date). Projects are generally used for short-term projects, which users need to collaborate on and house the content for in a single area.

For more information, see [Using projects and tasks](#) in the User Guide.

## What to use

Use a space if you:

- Need to share information about your department, program or initiatives with the rest of the organization/larger audience
- Need to add permissions controlling who can create which kinds of content in your place
- Need to create a hierarchical set of places
- Need permissions for your place to be managed centrally

Create a group if you:

- Want to collaborate privately with your team or project team
- Want to invite individuals to collaborate, and don't need centrally managed permissions
- Want to invite people from outside the organization to access your place

### Comparison of place properties

	Spaces	Groups	Projects
Hierarchical?	Yes	No	No
Can be private?	Yes, via permissions	Yes, via group settings.	Depends on parent place
Access permissions	Defined in the Admin Console. Inherited by sub-spaces	Defined in group settings. No inheritance	Inherited from containing place. Not customizable
Create permissions	Defined in the Admin Console. Inherited by sub-spaces	Any user	Inherited from containing place. Not customizable
Content allowed	Any; may be customized or restricted, or both by community administrators	Any; may be customized or restricted, or both, by community administrators	Any; may be customized or restricted, or both, by community administrators
Best uses	Large-scale collaborative needs with sub-space ability, such as those of an entire department or office, or an expansive topic	Smaller-scale collaborative needs either by a specific audience or a more specialized topic	Short term area to collaborate on a finite topic

## Planning customized community pages

There are several locations in Jive where you can customize a page with images and information, by using either tiles or widgets as building blocks.

You can customize pages in the following locations:

- The **News page** of the entire community. For more information, see [Customizing News page](#) on page 31.
- The **Home page** of the entire community, if it is enabled. For more information, see [Designing Home page of your community](#) on page 43.
- The **Your View page**, if it is enabled in your community. For more information, see [Disabling or enabling Your View feature](#) on page 89.
- The landing page of a place: an **Activity page** or an **Overview page** (place widgets must be enabled). For more information, see [Designing activity and custom pages for places](#) on page 275 and [Designing Overview pages for places](#) on page 329.

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**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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- A **custom page** added to a place if Pages are enabled in your community and the Overview page has been disabled for the place. For more information, see [Adding custom pages to places](#) on page 276.

Tiles and widgets like content blocks help you lay out certain pages in your community. Tiles are the default way to do this, but if you have widgets enabled, you can choose them instead. Use the following table to determine which model is available for you to use. For more information, see [Using tiles](#) on page 297 and [Adding Overview page](#).

The following table shows where you can use tiles, and where you can use widgets.

Page	Tiles	Widgets
Community Home Page		
Your View		
Place: Activity page		
Place: Overview page		
Place: Custom pages		

## Theming community

The Themes interface gives you the ability to create a professionally-designed community with just a few clicks.

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**Fastpath:** User interface: Your Avatar > Themes

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By using the interface, you can customize your community with your organization unique colors and logo, or use a predefined theme included with Jive, such as Bamboo or Winter. You can also export and import customized themes.

Community managers and users with Customize Site permissions can use the out-of-the-box theming feature. These users have the Themes option available under their user menu in the upper right corner of the user interface.

## Theming your site

The out-of-the-box theming tool lets you quickly customize the look and feel of your community. You can change the appearance of various interface elements, such as text, background colors, and logo image. These changes affect all pages in your community.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface. You can review what you can change by using out-of-the-box theming in [Theming options reference](#) on page 19.

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**Fastpath:** **User interface > Your avatar > Themes**

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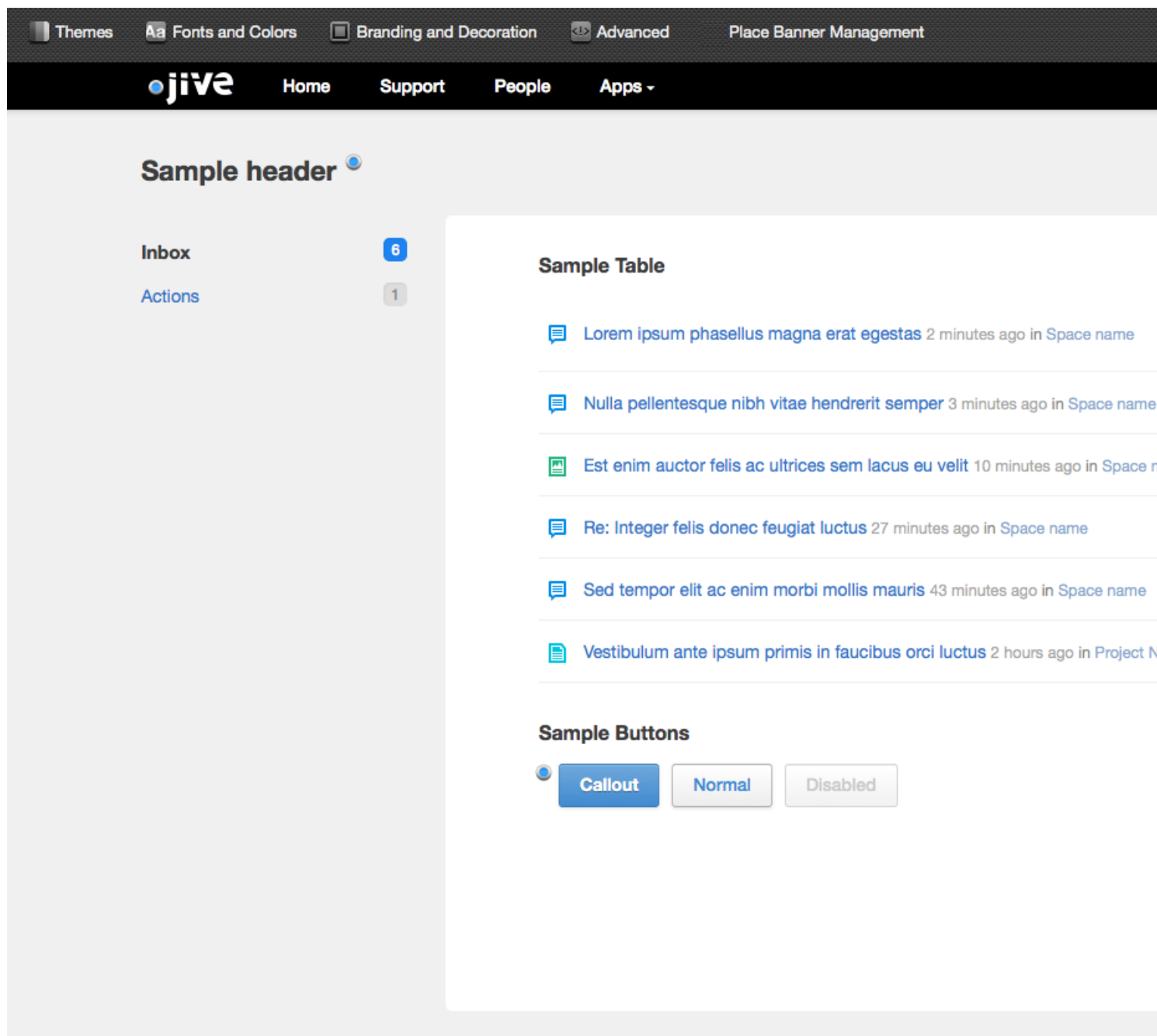
**Caution:** This kind of theming is different from the custom theming. We strongly recommend that you use the out-of-the-box theming tool whenever possible due to upgrade risks when using custom themes. For more information, see [Developing custom themes](#).

---

To open the theming interface:

- Click on your avatar in the upper-right corner and select **Themes**.

You see a special theme-editing interface that uses the default theme style (upgraded instances see their old theme):



To customize your theme:

1. Make changes by clicking the blue dots next to interface components. You can see an instant preview of the updates.
2. Use predefined themes as templates by selecting a theme on the Themes tab. Then use the theme as-is or make further changes by clicking the blue dots next to interface elements. For more information, see [Using predefined themes](#) on page 18.

3. Use the Advanced tab to change your header and navigation style. Options include a thin navigation bar that stays pinned to the top while users scroll pages (Reduced), a more spacious navigation bar and header area combo (Basic), or a fully customizable header or footer (Custom).
4. Enable Custom Links to create custom navigation buttons in your navigation bar. For more information, see [Creating custom links in the main menu](#) on page 21.
5. Get a full preview at any time for a more thorough look at your changes. You need to save your changes before previewing.
6. Save your new theme as a draft to continue working with it later by using the Save Theme option. This saves your work so that you can continue making theme changes later without affecting your current community.
7. Publish your saved theme when you are finished making changes to update your community immediately with the new theme. These changes affect all pages in your community.
8. Replicate saved themes by exporting them from one instance and then importing them to another instance by using the Import/Export link under Themes. For more information, see [Exporting themes](#) on page 24 and [Importing themes](#) on page 25.

## Optimizing themes for mobile browsers

When planning your community theme, note that some theming options are not viewable on the smaller screen of a mobile browser. You can select **Basic** theming for optimal mobile browsing.

Use these tips to help your community fully support mobile browsing:

- Set the theming option to **Basic** and test on a narrow screen. You can do this on your desktop browser by making the browser smaller.
- Header logos are not supported, so we suggest you upload your logo into the Branding header and Navigation area for the theme. See the steps below for help with this.

To add a logo that is compatible with a narrow-screen view:

1. Click **Your avatar > Themes** .

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

2. Once you are in the theming interface, click the blue dot to the left and directly under the header.
3. Select **Branding header > Logo or text** .
4. Click **Image**.
5. Click **Choose File** and navigate to and then double-click the logo you'd like to upload.



6. In **Alternate Text**, specify the alternative text for the image if a user for some reason cannot view it.
7. Click **Save Theme > Save and Publish**.

## Using community from mobile browsers

When accessing a Jive community from a mobile device, the mobile browser features simple navigation with large buttons that are better suited for touch screens. Note that options that are too complex or too large for narrow screens are not displayed.

To visit your community from a mobile browser, enter your community's URL into the browser of your mobile device and log in. Likewise, you can see the same narrow interface on the desktop version by making your desktop browser smaller.

The following options are available from a mobile browser:

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**Note:** Some content and functionality only make sense in the wider desktop view, so you won't see some things cluttering up the smaller space. However, iPads always benefit from the full functionality of a wide-screen view.

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<b>Read and interact with your streams and Inbox</b>	You can browse through and interact with your streams, and read and respond to your Inbox items.
<b>Create most content types</b>	Create different content from your mobile device, for example, ideas, blog posts, and documents.
<b>Search and filter</b>	Tap the magnifying glass, enter your search term, and then click the down-arrow to filter by content, people, or places, and the time period of the last modification.
<b>Access and use places</b>	Follow, join, or leave places from the mobile browser. You can also see a place activity, content, people, and any subspaces, projects, and custom pages the place may have. To sort the content in a place, click <b>Content</b> and then an icon: documents, discussions, blogs, or polls. If you're looking for the tiles on a group's activity page, be sure to scroll down to see them.

### Known issues

- The mobile browser does not work on Blackberry devices.
- Older Android browsers struggle with content creation. You can resolve this by upgrading your Android operating system and using Chrome to browse your community.

## Differences between out-of-the-box and custom themes

You can use the out-of-the-box Theming Tool or create custom themes, but you should understand the differences and upgrade risks between the out-of-the-box and custom themes.

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**Caution:** We strongly recommend that you use the out-of-the-box Theming Tool whenever possible due to upgrade risks when using Soy or FreeMarker themes. Alternatively, you can engage our professional service team to help you develop a custom theme if you don't want to do it yourself. Ask your Jive Software account representative about this service. For more information about the Theming Tool, see [Theming community](#) on page 13.

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### Out-of-the-box Theming Tool

The application includes an out-of-the-box Theming Tool available to community managers and users with Customize Site permissions. Those users can see the **Themes** option in their user menu in the upper right corner of the user interface.

The Theming Tool allows you to quickly customize your site with your organization's unique colors, logo, and fonts, or use one of the predefined themes included with Jive. You can also export and import themes to back up, share, and transfer themes to other Jive communities by using the Theming Tool. These themes are upgrade-safe for future versions of the application. For more information, see [Using predefined themes](#) on page 18, [Exporting themes](#) on page 24, and [Importing themes](#) on page 25 under [Theming community](#) on page 13.

### Custom themes in Soy or FreeMarker

The application also allows you to develop and deploy your own custom themes by using Soy or FreeMarker. Note that by deploying Soy and FreeMarker themes, you modify the application's underlying page templates. Doing so can make application upgrades extremely time-consuming and resource-intensive. At Jive Software, we have observed that customers who deploy Soy and FreeMarker themes often experience difficult upgrades due their custom themes. For more information, see [Developing custom themes](#).

If you want a custom theme but don't want to develop it yourself, you can have Jive Software's professional services team do it for you. Ask your Jive account representative about this service.

## Using predefined themes

By using the Themes interface you can select a predefined theme for your community such as Fall, Winter, or Bamboo. You can also use a predefined theme as a base design, and then make further changes to it.

1. Click on your avatar in the upper right corner and select **Themes**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the User interface.

2. Click **Themes** and select one of the **Predefined themes**, for example, Bamboo or Winter.
3. If required, customize your chosen theme by clicking the blue dots next to each component and making changes.

As you make changes, you see an instant preview of the updates.

4. For a thorough look at your changes click **Full Preview**.

You are required to save the changes before previewing.

5. When you are finished making changes, click **Save Theme**, then clear the **Publish theme on save** check box to save the theme, but not publish it. This saves your work so that you can continue making theme changes later without affecting your current community.

Alternatively, you can save the theme and publish it by selecting the **Publish theme on save** check box and saving the changes, which updates your community immediately.

## Theming options reference

You have many options for designing your site by using the theming interface.

**Table 1: Main theming options**

Field	Description
Themes	From here you can see all your saved themes, import or export themes to back up, share, and transfer themes to/from other instances (typically, test instances), or select from a list of predefined themes. For more information, see <a href="#">Importing themes</a> on page 25, <a href="#">Exporting themes</a> on page 24, <a href="#">Using predefined themes</a> on page 18.
Fonts and Colors	From here you can set the font of all text elements. Also, you can customize the text color for these elements, such as links, hovers, and metatext.
Branding and Decoration	From here you can set the community page width, favicon, background color and image, and border style. Be aware that if you set your Background Attachment to Fixed, depending on the image size and width, browser scrolling may be slow.

Field	Description
Advanced: Header and Navigation Style	<p>You can choose one the following options:</p> <p><b>Reduced (default for new instances; upgraded instances retain their existing theme)</b> Includes a thin navigation bar, no header, small logo, and limited options for the other configurable items of the user interface. The thin navigation bar stays pinned to the top when a user scrolls any page in the application. You don't need to know any CSS or HTML to use this option.</p> <p><b>Basic</b> Includes a full navigation bar, header, large logo, and more options than Reduced for the other configurable items of the user interface.</p> <p><b>Custom</b> Enables you to customize the HTML and CSS of the header (and optionally, the footer). Additionally, you can choose to hide the header.</p>
Advanced: Images	You can upload images to your theme to use in custom headers and footers. These images reside in your Jive instance as part of the theme, are accessible from the internet to anyone who knows the URL, and can be imported and exported with the theme. If a theme is deleted, its associated images are also deleted, so the best practice when creating themes is only to link to images uploaded to the current theme.
Advanced: Custom Links	You can create custom links on the main navigation menu. You don't need to know any CSS or HTML to use this option. For more information, see <a href="#">Creating custom links in the main menu</a> on page 21.
Advanced: Advanced Theming	You can create your custom themes with Freemarker or Soy. However, using custom themes incur substantial upgrade risks. We strongly recommend that you use only the Customize Your Site theming interface to avoid upgrade risks. For more information, see <a href="#">Developing custom themes</a> .

**Table 2: More options ("blue dot" options)**

These options vary depending on which Header and Navigation Style you select.

Field	Description
Branding Header and Navigation: Branding header	<p>Sets the community logo and background color and image of this header area.</p> <p>You can upload an image to be used as the logo image and specify in the <b>Alternate Text</b> box the alternative text for the image if a user for some reason cannot view it.</p>
Branding Header and Navigation: Main Navigation	<p>Sets the link colors, background color and image of the main navigation menu.</p> <p><b>Note:</b> You can also customize the actual buttons that appear in this navigation menu. For more information, see <a href="#">Creating custom links in the main menu</a> on page 21.</p>
Headline Color and Font (Sample Header)	Sets the background color and font of the headline area. You can also choose to inherit the font from the Branding and Decoration settings.
Secondary Navigation	Styles the Create menu, the search field, and the menu under each user name or avatar, including the shapes of the avatars shown in the user menu. You can use this setting to remove the search box from the main navigation menu.
Sidebar List	Sets the text color and font for links in the sidebar. If you don't set this style, it inherits the style of the Sample Widget.
Sample Buttons	Sets the color style of the buttons and various other elements throughout the user interface, for example, main navigation menu highlights.
Sample Widget	Sets the widget elements, such as border style and header background.
Search	Sets the display style of the Search box.
User Profile	Sets the text color and the style of the arrow drop-down menu of the User Profile.

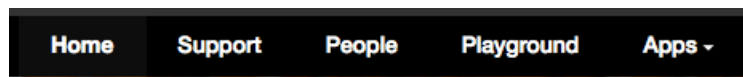
## Creating custom links in the main menu

You can customize your main navigation menu so that users can quickly jump to your community's most popular or useful pages or external links by adding, editing, or deleting navigation buttons.

**Note:** You can have a maximum of five buttons on the main navigation menu.

Here's an example of a customized navigation menu that includes a custom button: Playground.

**Figure 1: Example of Custom Links**



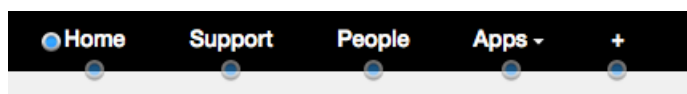
To create a custom link in the navigation menu:

1. In the user interface, go to **Your Avatar > Themes > Advanced > Custom Links** and select **Custom Links enabled**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

You should see blue dots under the main navigation buttons like this:

**Figure 2: Custom Links Navigation**



2. From here, you have several options. Generally speaking, you can create navigation buttons that link to pages inside or outside of your community. Also, you can rename existing pages (for example, change News to 411 or People to Our Users), create drop-down menus of linked pages, rearrange the order of the navigation buttons, or even delete navigation buttons altogether. For details, see [Option reference of main navigation menu](#) on page 22.
3. If you are creating a Single or Multiple custom link (not a Preset) and your community is set up for multiple languages, click **Provide other translations** for each navigation button you create, select the languages and provide translations for every language of the community.

For each new link you configured, you see a name and URL field. If you don't provide a translation for a particular language, users who have that language in their browser settings see the links in the system language set for your community. Because words and phrases can take up more screen space in some languages than in others, you should test your translations to make sure they are displayed correctly.

4. When you finished customizing your navigation buttons, click **Full Preview** in the lower left corner to see how your changes look before publishing them.

## Option reference of main navigation menu

Here's a reference that describes what you can do with custom links in the main navigation menu by using the theming interface. You can have a total of five preset

and custom buttons in the navigation menu and drag-and-drop them to change their order on the menu.

## Custom buttons

Customs buttons with single or multiple custom links are useful for linking to pages inside or outside of your community. Be aware that if you use these custom buttons, you need to provide translations if your community is delivered in multiple languages by clicking **Provide other translations** for each button that you add.

**Table 3: Custom button options**

Nav Bar Option	Links to
Single	Customizes a single link title and URL. For example, it might be helpful to your users to link to your CEO's Blog here. Alternatively, you could use this option to change the name of an existing Preset page. For example, you might rename the People button Our Users. Note that if you do this, the URL does not change, just the text in the navigation menu.
Multiple	Creates a drop-down menu with a unique title. For example, a Support button might drop down to Knowledge Base, File a Case, and Feedback. Or a Sales button might drop down to Create an RFP, Check the CRM, and Latest Wins.

## Preset links

The Preset buttons are useful for linking to existing preset pages in your community such as Content, People, or Places. When you use any of these Preset options as is, they are localized automatically for all of the application's supported languages. You could also change the navigation bar label of these Preset options by using the Single link, as described above; but in that case, you would need to provide your translations by clicking **Provide other translations**.

**Table 4: Preset links options**

Nav Bar Option	Links to
Content	<code>/content</code>
People	<code>/people</code>
Places	<code>/places</code>
News	<code>/news</code>
Browse	Creates a drop-down menu that contains at least one of the following predefined links: Content ( <code>/content</code> ), People ( <code>/people</code> ), Places ( <code>/places</code> ).

## System buttons

You can make some modifications to the following system buttons, including moving them around (in the case of the Create menu), or not showing them at all.



**Table 5: System links options**

Nav Bar Option	Links to
Home	The Home button appears in the main navigation menu and takes users to the /news page by default. This button always appears as the left-most navigation item. Be aware that users have the option to pin any of their News streams to the Home button. For more information, see <a href="#">Pinning pages for quick access</a> .
Create	The Create menu (as a button with the text "Create") appears in the main navigation when the Basic header is enabled (you may not see it in preview mode, but only after you publish). Otherwise, the Create menu appears in the secondary navigation area to the right as a pencil icon; if you use the Custom header, you have the option to use the text Create for the button instead of a pencil icon. Note also that the Create menu must be enabled at <b>Admin Console: System &gt; Settings &gt; Home Page</b> . For more details about the header options, see the <a href="#">Theming options reference</a> on page 19.

## Exporting themes

By using the **Themes** interface, you can back up a copy, share, or transfer your saved themes to another Jive community by using the Export a Theme feature.

When you export a theme by using the out-of-the-box theming tool, the application creates a zip file that contains all of the theme's information, such as its customized colors and images. This zip file includes any images you uploaded by using the Advanced theming interface. The theme file is encrypted for security reasons, so you cannot further customize its contents.

To export a theme:

1. Click on your avatar in the upper right corner and select **Themes**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

2. From the theming page, select **Themes > Import/Export** .
3. Select **Export**, and then select the theme you want to export.
4. Select **Save the file** to save the theme as a zip file.
5. The zipped file is downloaded to your local file system.

Now, you can import the zipped theme file to another Jive community, as described in [Importing themes](#) on page 25.



## Importing themes

By using the **Themes** interface, you can import a theme to use it in your community.

When you import a theme, you add it to your list of saved themes. From there, you can click on it to preview the theme in your community. Note that you can import only the zip file that is created when you exported a theme. This zip file includes all images that were uploaded by using the Advanced theming interface. For more information about exporting themes, see [Exporting themes](#) on page 24.

To import a theme:

1. Click on your avatar in the upper right corner and select **Themes**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

2. From the theming page, select **Themes > Import/Export**.
3. Choose **Import**, and then browse to and select your theme.
4. Click **Add to saved themes**.

Now you should see the new theme in your list of saved themes. Click on it to see a preview of your community with that theme.

## Replacing place template's default banner

You can replace the default banner image that appears in a place template (such as the Best Practices or another template) with your custom image. Additionally, you can change the background color, text color, and repeating pattern of the default image.

To replace the default banner image with a custom image in a place template:

1. In the user interface, click **Your avatar > Themes > Place Banner Management**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

2. On the **Template Mapping** tab, click **Edit** on the template you want to change (such as Event Planning).
3. Change the header text and background color or leave them as is.
4. Browse to the custom image you want to add and select it.
5. Set the background position and pattern for the image.
6. Select **Update existing usages** if you want your change to update existing images.  
If you do not select this option, the banner in existing instances of the place template remains unchanged.

7. Click **Save**.

## Managing place banner presets

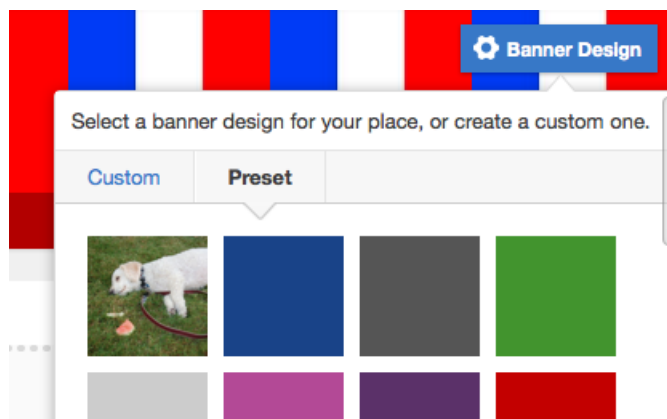
You can add custom images to the existing set of banner designs available in places. These are the images place owners see when they are editing the banner design of a place. You can also change the order of the default banners, or delete any of them.

---

**Fastpath: User interface: Your avatar > Themes > Place Banner Management > Place Banner Presets**

---

Any changes you make to the place banner presets, such as adding a new banner preset, affects what place owners see when they edit the banner for their place. In the following image, the place owner sees a custom image that they can use as a banner because the community manager added this new image when they added a new banner preset:



For more information about adding images to banner presets, see [Adding new images to place banner presets](#) on page 26.

Note that the place owner can choose to upload another image for the banner by clicking **Custom**.

## Adding new images to place banner presets

You can add custom presets with your images to the existing set of banner designs available in a place template.

To add a new custom preset with your image:

1. In the user interface, click **Your Avatar > Themes > Place Banner Management > Place Banner Presets > Add new banner preset**.

Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface.

2. Change the header text and background color or leave them as is.

3. Browse to the custom image you want to add and select it.
4. Set the background position and pattern for the image.
5. Click **Save**.

Place owners can see this image in their Banner Design options.

## Changing community URL

If your Jive community is deployed on-premise (and not hosted by Jive Software), you can change the community URL, which is the web address of your community.

---

**Fastpath: Admin Console: System > Management > System Properties**

---

If you want to change the URL of the application, first you change the URL itself, and then update the related settings with the new URL. If you're a hosted customer, you can contact [Support](#) instead.

If you want to know how to change the root context of your community, see [Changing root context \(optional\)](#).

### Changing application URL

To change the application URL:

1. In the Admin Console, go to **System > Management > System Properties**.
2. Browse to the `jiveURL` property, click **Edit** and specify the new URL in the **Property Value** box.
3. Click **Save Property**.

### Updating components with new URL

Next, update the following components with the new URL.

---

**Caution:** If you change the `jiveURL` system property from `https` to `http` temporarily for the purpose of doing an upgrade, you need to also change the value of the system property `jive.auth.forceSecure` to `false`. This system property causes a redirect of all incoming requests to `https`.

---

---

**Note:** This list may not include all relevant considerations for your specific deployment configuration.

---

Component	How to update with the new jiveURL
Web application nodes	<p>As the jive user, set the following:</p> <ul style="list-style-type: none"> <li><code>jive set webapp.http_proxy_name &lt;newdomainname&gt;</code></li> <li><code>jive set webapp.http_proxy_port 443</code></li> <li><code>jive set webapp.http_proxy_scheme https</code></li> </ul>
SSO	<ol style="list-style-type: none"> <li>Update the base metadata URL by going to <b>Admin Console: People &gt; Settings &gt; Single Sign-On &gt; SAML &gt; Advanced</b>, or by editing the system property <code>saml.baseURL</code> (<b>Admin Console: System &gt; Management &gt; System Properties</b>).</li> <li>Update the <code>Location</code> attribute in the metadata itself.</li> <li>Restart the server.</li> </ol>
Mobile	We strongly recommend that your Mobile Gateway Access URL matches the <code>jiveURL</code> (this is not required, however). If you change the <code>jiveURL</code> , update the Gateway Access URL to reflect the change ( <b>Admin Console: Mobile &gt; Native Apps &gt; Gateway Access URL</b> ).
SSL/Tomcat	Update the new URL in the <code>server.xml</code> file for the Tomcat connector.
Apache	Ensure that any redirects you have configured previously are reconfigured to point to the new URL.
Jive for Office and Outlook plugins	Ensure that the account configured in the Jive for Office and Outlook plugins contains the new URL (even if the change was due to adding SSL support).
Emoticons	Update the URL setting for the emoticon post-processing filter ( <b>Admin Console: Spaces &gt; Settings &gt; Filters and Macros &gt; Emoticon Filter &gt; Settings</b> ).

## Renaming root space

You can change the name and description of the root space from the Admin Console. By default, the root space is named `Main`.

---

**Fastpath:** **Admin Console: System > Settings > Space**

---

To change the name of the root space:

- In the Admin Console, go to **System > Settings > Space**.
- On the **Space Settings** page, in **Space Name**, enter the community name.
- Optionally, in **Space description**, enter the space description.
- Click **Save Settings**.

The root space becomes available under new name throughout the application, for example, when you need to select a place.

## Setting up locale and time zone

You can set the default locale, time zone, and character set for your community. The correct locale helps to make people's experience in the community feel more familiar and comfortable.

A locale represents a set of user interface properties—including language and time zone, for example—that are often related to the user's geographic region. The locale setting determines what language UI default text is displayed in. It also determines how dates are formatted and what the character encoding is. For communities that want to support a broad variety of languages, Jive requires using UTF-8 (Unicode) as your character encoding.

You can use the Locale settings to determine the time zone Jive uses for the midnight start time and 11:59 end time for announcements, polls, projects, tasks, and checkpoints. Blog posts obtain their settings from the user's time zone.

---

**Fastpath: Admin Console: System > Settings > Locale**

---

---

**Note:** Only a subset of the languages listed is available in the application by default. For a list of languages in the subset, visit your user preferences page and view the Languages list on the Preferences page.

---

### Locale inheritance rules

As a community administrator, be aware that when you modify locale settings for the application (global) or a space, the user may have also set their locale preferences, which take precedence. Here's the locale precedence hierarchy, with the first given the highest precedence:

1. Locale set by the user in their Preferences.
2. Locale set in the user's web browser. For example, a browser set to English overrides global settings you make for another locale.
3. Locale set at the space level. For more information, see [Setting Space Name, Locale, and Allowed Content Types](#).

---

**Fastpath: Admin Console: Spaces > Settings > Space Settings**

---

4. Locale set at the root space (global) level.

---

**Fastpath: Admin Console: System > Settings > Locale**

---

---

**Note:** The server time zone set on the operating system can occasionally override some of the other Locale settings. If you encounter unexpected mixed-language

results on your site, try checking the OS language set on the machines where you installed Jive.

---

## Inviting people to community

As a community manager, you can invite people to join the community. Informing people about the community site is rather simple: you provide them with a direct link to the site either from the community itself or by using any other communication channel.

On the community site, you can send invitations to people by using the Send Invites dialog box, as described Step [below](#). You can also send an invitation when creating a user account in the Admin Console or configure the system to automatically send invitations to self-registered users, as described in [Creating user accounts](#) on page 406 and [Configuring self-service user registration](#) on page 138.

Community managers or users can also invite external contributors to join the community. For more information, see [Adding external contributors](#) on page 371.

After receiving the invitation, people can join the community by using the available methods, for example, self-registration or SSO. For more information, see the following sections: [Managing access](#) on page 126, [Setting up LDAP and Active Directory](#) on page 54, and [Setting up Single Sign-On](#) on page 66.

To invite people to join the community by using the Send Invites dialog box:

1. In the user interface, click **People > Send Invites**.
2. In the **Send Invites** dialog box, enter the email addresses of people you want to invite.

When selecting people to invite, you can also do the following:

- To invite several people from your email address book or the user management system, browse contacts by clicking the browse icon. Select the people or groups of people you want to invite, and then click **Add selected people**.
- To invite people from an existing email list, export the list of addresses from your email application, then copy and paste it in. The addresses in the list must be comma-, space-, or semicolon-delimited.

3. If necessary, edit the message you want potential group members to see with their invitation.
4. Click **Send Invitation**.

The people you invite receive emails with the invitations to join the community.

# Configuring community

In this section you can find tasks related to community setup and configuration.

## Customizing News page

The News page features a variety of streams (News streams) designed to direct users to content, people, and places of their interests.

For example, it includes an All Activity stream, which shows the recent activity from all over the community depending on user permissions. Additionally, it also displays the latest updates in specific streams that a particular user may be following or any custom streams that the user may have created.

---

**Attention:** You must have Manage News Streams or Manage Community permissions to create, modify, or delete News streams.

---

For more information on using the News page and News streams, see [Using News](#) in the User Guide.

## Tips for creating News streams

Before you create a News stream, consider the following questions.

**Does absolutely everyone need this information?**

News streams created for everyone display information on the News page for *all* registered community users. If you work in a large organization, this could include all people across a wide variety of job roles, divisions, and locations. If you're confident the information is relevant to all of these users, follow the instructions in [Creating News streams for everyone](#) on page 32.

**How much traffic is generated by the place or blog I want to share content from?**

The place you select for a News stream should not be too noisy for the intended audience. For example, if your Sales group sometimes contains social chatter, consider creating a more controlled group or blog that contains only key communications, and use that one for the News stream.

**Who needs this News stream?**

You can define audiences by selecting individual people, by filtering on profile fields, or by selecting a user permissions group that is defined in Jive. The last two choices may require some preparation on your part: to make sure you're using profile fields consistently or to create any permissions groups you need for targeting an audience. Note that the system-defined groups in Jive (under **Admin console: People > Management > User Group Summary**) cannot be used to target audiences. You can use any custom-defined groups shown on the



page. These groups may be created manually or synced from an SSO provider.

**What are some examples of News streams I might create?**

For a detailed example of how you might create News streams for your community, see [All About the News Feature](#) on Worx.

## Creating News streams for everyone

Users see News streams listed across the top of the News page. As a community manager, you can create and manage the streams for all registered users to see to the News page.


---

**Attention:** You must have Manage News Streams or Manage Community permissions to create, modify, or delete News streams.

---

You can create up to 10 News streams to be displayed on the News page in the order listed under **News Stream** when you edit the News page.

To create News streams for everyone in the community:

1. In the user interface, go to the **News** page and click **Manage the News page** icon (  ) next to **News** to create a new stream.
2. Under **Create custom streams for**, select **Everyone**.
3. In **News Stream Title**, enter the stream title, for example, CEO's Blog.  
This is the stream name users see on the News page.
4. In **Places/Blogs**, specify the place or blog from which you want the stream to pull content.

---

**Tip:** If you see both a place and the place blog listed, note that selecting the blog would post less content in the stream. In other words, selecting a place means *any* new content created there shows up in the stream. Selecting the blog means only blog posts show up.

---

5. Under **Audience**, select whether you want guest users (users who have not registered) to be able to see the stream.

This is only relevant if your community is visible to unregistered users.

6. Under **Notify Users**, select whether you want the stream's users to receive email or mobile notifications every time new content is posted in the place or blog.

---

**Tip:** In general, we recommend setting this to **Off**. However, you may likely want to enable notifications on the most important content that your users cannot miss. Note that if notifications get noisy, users may stop reading the content.

---



7. Click **Save** to save the stream configuration.

You can create up to 10 News streams and reorder the list by dragging streams to new positions.

8. When you finished adding streams, click **Publish Layout**.

For a detailed example of how you might create News streams, see [All About the News Feature](#) on Worx.

## Creating News streams for specific users


Users see News streams listed across the top of the News page. As a community manager, you can create and manage the streams to show a different selection of content to different audiences on the News page.

---

**Attention:** You must have Manage News Streams or Manage Community permissions to create, modify, or delete News streams.

---

To create a News stream so that specific users see content relevant to them:

1. In the user interface, go to the **News** page and click **Manage the News page** icon (  ) next to **News** to create a new stream.
2. Under **Create custom streams for**, select **Specific Users**.

This opens the **Edit News Stream** page.

3. In **News Stream Title**, enter the stream title, for example, `My Team News`.

This is the stream name users see on the News page.

---

**Tip:** Make the stream title work for every rule you are going to create for this stream.

---

4. Select **Create Stream Rule**.

This opens the **Create a Stream Rule** page.

5. Specify stream rules to filter users. For each rule, do the following:
  - a) Under **Places/Blogs**, enter or select the place or blog from which you want the stream to pull content.

---

**Tip:** If you see both a place and the place blog listed, note that selecting the blog would post less content in the stream. In other words, selecting a place means *any* new content created there shows up in the stream. Selecting the blog means only blog posts show up.

---

- b) Under **Audience**, enter the users and group of users who must be able to view the stream. You can also enter profile field values.

For more information on user groups, see [Managing user groups](#) on page 402.

You also have the option to select **Create profile filter** so that you can filter your audience based on a combination of profile fields. For more information on filtering based on a profile field, see [Creating an Audience-Specific News Stream in All About the News Feature](#) on Worx.

- c) Click **Save** to save the stream filter and return to the stream rules configuration page.

You can create up to 100 rules for a stream.

- 6. Under **Notify Users**, select whether you want the stream's users to receive email or mobile notifications every time new content is posted in the place or blog.

---

**Tip:** In general, we recommend setting this to **Off**. However, you may likely want to enable notifications on the most important content that your users cannot miss. Note that if notifications get noisy, users may stop reading the content.

---

- 7. Click **Save** to save the stream configuration.

- 8. When you finished adding streams, click **Publish Layout**.

As an example, you could create a stream called Management Ideas, and then create different rules that direct new content from Finance groups to the Finance managers and blog posts from the Technical Managers group to Engineering managers. You could then add a stream rule targeting content from Human Resources management groups to all these management groups because those management ideas can apply to any manager.

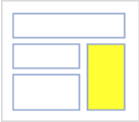
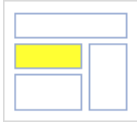

For a detailed example of how you might create News streams, see [All About the News Feature](#) on Worx.

## News page tile reference

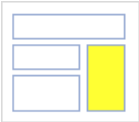
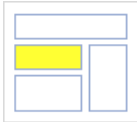

Here is a complete list of the tiles available on the News page of your community.

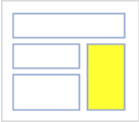
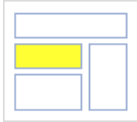
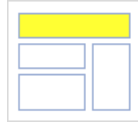
Tiles are split by category, similar to tiles arrangement in the UI. Some tiles can be available in more than one category.

## Collaboration tiles

						
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Document Viewer	Shows a full preview of a document you choose to display	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Key Dates	Shows selected dates for your team	Content added manually				




## Graphic Elements tiles

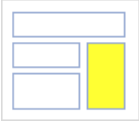
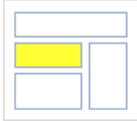
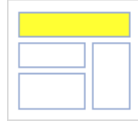
						
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Banner	Adds a series of linked images with text to promote important content	Content added manually				
Carousel	Links a rotating image carousel to crucial destinations	Content added manually				
Create an HTML Tile	Adds HTML	Content added manually				*

Tile	Description	Dependencies	 Narrow column	 Wide column	 Jumbo column	Jive Daily support
Image Gallery	Creates a slideshow with images and captions	Content added manually				
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually				

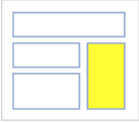
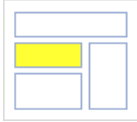
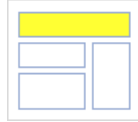
\* The configuration of each Custom HTML tile defines if it is available on Jive Daily for Cloud. For more information, see [Using Custom HTML tiles](#) on page 300.

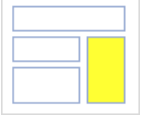
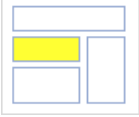

### Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Wide column	 Jumbo column	Jive Daily support
Expandable Sections	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important people for your place	Content added manually				

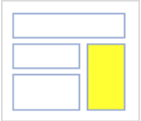
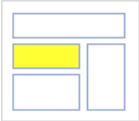

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Key Content and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually				

### Dynamic List tiles

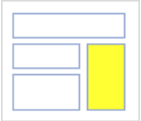
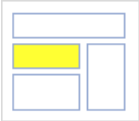

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Featured Quest	Shows the user's progress as they complete a quest	Relies on a quest being selected				
Latest Blog Posts	Shows the newest blog posts in your community	Content added manually. Blogs must be enabled				
Similar Places	Shows places with the same tags	Relies on content being tagged				

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Super List	Shows an up- dated, filtered view of con- tent, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing re- sult				
Tagged Content	Displays con- tent that matches specif- ic tags	Relies on con- tent being tagged				
Top News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on con- tent from the News streams				
Trending Content	Displays con- tent that is getting an in- crease in views and likes	Relies on con- tent getting viewed or liked, or both				
Trending People	Displays peo- ple whose ac- tivity is getting an increase in views and likes	Relies on con- tent getting viewed or liked, or both				

## Support tiles

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Ask a Question	Finds a previously asked or answered question, or gives the ability to ask a new one	Relies on content query. Configure to select content types and places to query				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs.	Content added manually				
Super List	Shows an updated, filtered view of content, people, or places.	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result				




## External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually				*
Quests	Displays quests for community members to complete	Relies on a quest being enabled				
Hero Image	Provides a key image with a link and call to action as a header for your News page	Content added manually				

\* The configuration of each Custom HTML tile defines if it is available on Jive Daily for Cloud. For more information, see [Using Custom HTML tiles](#) on page 300.



## Custom tiles

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Create a Content or Place Tile	Displays a list of content and places that you can edit and manage yourself. This tile and its content can be shared and used by other people in the community	Content added manually				
Create a People Tile	Build a list of important people for your place	Content added manually. This tile and its content can be shared and used by other people in the community				

## Rebuilding News streams

If the synchronization of content or the users of a News stream is lost, you can rebuild the News stream. A stream rebuild verifies all place memberships against the rules of the stream, and corrects any issues, similar to the way a search index or browse system rebuild works.

---

**Fastpath:** **Admin Console: System > Settings > News**

---

The Activity Engine service handles a number of key features in the Jive application including streams for places and people. Because the Activity Engine is a remote system and users change place membership at will, there may be times when those kinds of changes are not propagated correctly and user and streams get out-of-sync. For example, a stream could get out of sync if you lose internet connectivity while you're creating or editing it.

During a rebuild, every member of the audience for a News stream you select is verified against the stream's rules and any out-of-sync issues are corrected.

To rebuild a News stream:

1. In the Admin Console, go to **System > Settings > News**
2. Under **(Publication) Rebuild**, select a stream to rebuild.
3. Click **Rebuild**.

## Configuring News FAQ

Here are some frequently asked questions and answers about setting up the News page and news streams.

**Who can create and modify the News page and news streams on the page?**

People with Manage News Streams permissions have the rights to modify the News page and create, modify, or delete news streams for this page for the entire community, including those set up by other people with Manage News Streams permissions. People with Manage Community permissions already have these rights.

Community managers can give other users Manage News Streams permissions, by going to **Admin Console: People > Permissions > System Administration** and creating a user override to assign the user Manage News Streams permissions.

**Can I add a secret place to the News stream?**

Yes, if you are an owner or member of the secret place. Be aware when you add a secret place to a news stream to be displayed on the News page that other users with Manage News Streams or Manage Community permissions are able to see this stream. However, they are not able to modify or delete a News stream that has a secret place of which they are not an owner or member.

**Is there a limit to the number of News streams the community can have?**

There can be up to 10 news streams on the News page configured in your community. This does not include each user's ability to create up to 10 custom streams of their own; so a user can see up to 10 News streams and 10 of their own custom streams listed in the left sidebar.

**How many rules can I have per News stream?**

You can have up to 100 rules in a News stream. Within each rule, audiences and places are essentially unlimited.

**Can I change the name of the News link on the navigation bar?**

Yes. Just use the Single Custom Links feature in the theming interface. For more information, see [Option reference of main navigation menu](#) on page 22.

**How do I turn off Top & Trending?**

You can turn off Top & Trending in through a system property. You can submit a ticket to support asking for the following system property change: `recommender.enabled = false`.

This removes the Top & Trending stream from being introduced into the News aggregation.

## Designing Home page of your community

The Home page is the page users see when they login to your community. It is an optional page that you can configure with a variety of widgets. Alternatively, you can delete the Home button from your community in the Admin Console.

---

**Fastpath:** Admin Console: System > Settings > Home Page > Enable the widgetize community home page .

---

You can customize the Home page of your community if you have Manage Community permission.

---

**Note:** If you do not enable a community Home page, your users see the News page (/news) when they log in. For more information about the News page, see [Customizing News page](#) on page 31.

---

If you want to choose a different community page as the default for all users, you can use the `skin.default.landingpage` system property to set it to any of the custom pages. Check the URL of the target page for the correct value. For example, to set the default page to Activity, set the value to `/activity`.

## Home page options

For the community Home page, you can enable configuration options that reflect the needs and use cases of your community.

---

**Fastpath:** Admin Console: System > Settings > Home Page

---

---

**Note:** This topic describes the options for what desktop users see when they login to your community. To set up a landing page experience for users who are viewing the community on a mobile browser, see [Creating mobile Home page](#) on page 49.

---

Table 6: Home page options

Option	Description
<b>Enable the main navigation create menu</b>	Enabling this setting allows users to create a variety of content, such as discussions and documents, in the community. This option is helpful for communities focused on content creation and sharing, for example, a community focused on employees getting work done together. For more information, see <a href="#">Enabling or disabling Create menu</a> on page 50.
<b>Enable the widgetized community home page</b>	<p>Enabling this setting allows you to configure the Home page with a number of useful widgets, such as the Image Navigation widget that links users to your most common places or content, the Newest Members widget to encourage adoption and participation, and a Featured Content widget that connects to your community's important content.</p> <hr/> <p><b>Note:</b> If you do not enable a community Home page, your users see the News page (<code>/news</code>) when they log in.</p> <hr/>
Simple home page	Enabling this will remove the left sidebar that includes links to Inbox and Actions. This option is helpful if you want to de-emphasize the participatory and collaborative features of the application and focus more on content consumption, for example, in a customer or partner support community where people are typically trying to find answers to questions.

If you want to choose a different community page as the default for all users, you can use the `skin.default.landingpage` system property to set it to any of the Home pages. Check the URL of the target page for the correct value. For example, to set the default page to Activity, set the value to `/activity`.

This section calls out a few widgets that are commonly used on Home pages, but you have even more options. For more information, see [Widget reference](#) on page 339.

## Configuring Home Page

You can customize the Home page with a variety of widgets that features important content.

You need to have the Manage Community permission, which is a System Administration permission, to make this change.

To customize the community Home page:

1. Make sure the widgetized home page is enabled ( **Admin Console: System > Settings > Home Page** ).
2. From the user interface, click your avatar in the top right corner, and then select **Overview Page**.
3. Customize the page by using widgets.

The instructions for configuring the commonly used widgets are listed in the following sections:

- [Setting up Image Navigation widget](#) on page 45
- [Setting up Search widget](#) on page 46
- [Setting up Ask widget](#) on page 47
- [Setting up Answered Questions widget](#) on page 48

---

**Note:** The community Home page is similar to place overview pages. For more information about overview pages, see [Designing Overview pages for places](#) on page 329.

---

4. To save the changes, click **Save for Later**.
5. To revert to the last saved configuration, click **Discard Changes**.
6. To publish the changes, click **Publish Layout**.

## Setting up Image Navigation widget

With this widget, you can provide your users with image-based navigation to quickly direct your users to useful pages.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

You must have Manage Community permission to configure the community Home page. For more information, see [Adding Overview page](#).

First, you add the Image Navigation widget to your place's layout, then add images and links to the widget.

### ***Adding Image Navigation widget***

To add an Image Navigation widget to your place layout:

1. In the user interface, click on your avatar in the upper right corner and select **Overview Page** to open the Home page for editing.
2. From the widgets list, select **Other > Image Navigation Widget** .
3. Drag the widget down into your layout area and drop it where you want it.

4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.  
You can use the default title (Image Navigation Widget), create your own, or leave the box blank if you do not want any title.
6. In **Hide Header and Border**, select whether you want the header and border to be displayed.
7. Click **Save Properties**.

The **Add a new link** button appears in the widget.

### ***Adding images to the widget***

After you've added the Image Navigation widget to your place layout, you can images and links to the widget, then publish the updated layout of the place.

To add images to the widget:

1. In the widget, click **Add a new image link**.
2. In **Provide a Target Link**, type in the URL to which you want the image to link.
3. Provide a caption for the image.  
You can use the caption Jive provides automatically, or overwrite it with your own.
4. Select the image you want to use for this link.
5. Click **Save**.
6. Repeat these steps until you have all the images you want to display in the widget.  
The limit is 8. You can move them around to change the order in which they are displayed by dragging and dropping them.
7. When you are finished, click **Publish Layout** on the editing page.

### **Setting up Search widget**

The Search widget allows your users to quickly search a specific space or group in your community, or the entire community.

You must have Manage Community permission to configure the community Home page. For more information, see [Adding Overview page](#).

To add a Search widget to the Home page of your community:

1. In the user interface, click on your avatar in the upper right corner and select **Overview Page** to open the Home page for editing.
2. From the widgets list, select **Content > Search Widget**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Search) or create your own, for example, Search Here.

6. In **Number of Results**, enter the number of results to return in the search.
7. In **Place to Search**, select the place to perform the search. Do one of the following:
  - Leave the box blank to search the current place.
  - Type a place name to search the selected place. This can be any place in the community, or the entire community (which would be your root space).
8. Click **Save Properties**.
9. When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved and the updated page becomes visible to other users.

### Setting up Ask widget

The Ask (place) widget allows users to quickly ask a question in a specific space or group in your community, or the entire community. After the user types a question into the Ask widget, the search function displays possible answers based on matching keywords. If the user doesn't see the correct answer in the results list, they can create a discussion right from the widget. This can be especially helpful in places designed to support customers or employees.

You must have Manage Community permission to configure the community Home page. For more information, see [Adding Overview page](#).

To add an Ask (place) widget to the Home page of your community:

1. In the user interface, click on your avatar in the upper right corner and select **Overview Page** to open the Home page for editing.
2. From the widgets list, select **Content > Ask (place)**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Ask (place)) or create your own, for example, Ask Us a Question.
6. In **Submit button text**, enter the text to be displayed on the Ask button.

You can use the default text or create your own, for example, Submit Your Question.
7. In **Search From**, select a place you want to perform the initial search.

You can search in the current place, a single place that you specify, or all public places in the community (the root space).
8. In **Number of Results**, enter the number of results to return in the search.
9. In **Display Results**, select which search results must be displayed. You can select one, some, or all of these options:



Options	Description
All Questions	Displays in search results all questions that have been asked, whether or not they have been answered.
All Discussions	Displays only discussions in search results.
Answered Questions	Displays only Answered Questions in search results.
Documents	Displays only documents in search results.

10In **Post Questions to**, select the place to which you want questions posted.

The place can be different from the place where the Ask widget is located. For example, you could put the Ask widget in an Employee Questions group, but post the questions to the Employee Q&A group.

11Click **Save Properties**.

12When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved and the updated page is available to other users.

### Setting up Answered Questions widget

The Answered Questions widget allows your users to quickly see a list of questions that have been answered in a specific space or group in your community, or the entire community. Answered questions displayed in this widget are those that include a reply marked as a Correct Answer.

You must have Manage Community permission to configure the community Home page. For more information, see [Adding Overview page](#).

To add an Answered Questions to the Home page of your community:

1. In the user interface, click on your avatar in the upper right corner and select **Overview Page** to open the Home page for editing.
2. From the widgets list, select **Content > Answered Questions**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.  
You can use the default title (Answered Questions) or create your own, for example, Recently Answered.
6. In **Number of Results**, enter the number of answered questions to display in the widget.
7. In **Show Oldest Questions First**, select the order in which you want the answered questions to be displayed.
8. In **Place**, specify the place from which you want to pull the answered questions. Typically, this the current place is used, but it could be any other place in the community as well, or the entire community (this would be your "root" space).



9. Click **Save Properties**.

10. When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved and the updated page is available to other users.

## Creating mobile Home page

As a community manager, you can create a tile-based, mobile-compatible community home page for users accessing the community with a mobile device.

The Community Overview page for desktop users relies on widgets, which can't be viewed on a mobile device. You can now design a version tailored to mobile users. When accessing the community on a mobile device (and not using the iOS or Android native app) users can see a welcome message you provide as well as image-rich dynamic content delivered through up to 12 tiles. This view will also be available in the reduced-browser view when you access the community on a desktop browser.

---

**Note:** You need to have the widgetized community home page enabled in order to create the mobile one.

---

The [Place tile reference](#) on page 318 includes more information about individual tiles. (Not all tiles are available for the mobile home page.)

To set up your mobile home page:

1. Under your name or avatar, click **Mobile Home Page**.

By default, the page contains the following tiles, with no content defined:

- Carousel tile
- Ask a Question tile
- Key Content and Places tile

2. Click the **Edit page** link to configure these tiles or add different ones.

3. In the Welcome Message text box, type up to 500 characters of the message you want to display at the top of the mobile home page. Keep in mind this message will be displayed in a very compressed space, so keep it short!

4. Add or delete any tiles you want to add to the page, and configure them to contain the information you want by clicking the gear icon. You can use the arrows to move the widgets up and down.

5. Click **Save**.

6. If you want to preview the mobile page, just go to the community home page and resize your browser. When you've reduced the browser size enough, the mobile home page replaces the regular one.

## Enabling or disabling Create menu

The Create menu allows users to create a variety of content, such as discussions and documents, in the community. You can enable or disable this feature.

---

**Fastpath:** **Admin Console: System > Settings > Home Page**

---

---

### Note:

---

By default, to encourage users to contribute to the community the Create menu is enabled, and users see a pencil icon in the upper right corner of the user interface. To enable or disable the Create menu:

1. In the Admin Console, go to **Admin Console: System > Settings > Home Page**
2. Select **Enable the main navigation create menu**, and then click **Save**.

You can change how the menu is displayed, as described in [Theming community](#) on page 13. Or you can disable the Create menu for the community by using the Admin Console.

---

**Caution:** With the Create menu off, you need to create places through a different process. For more information, see [Group creation options](#) in the User Guide and [Space creation options](#) on page 352.

---

---

**Tip:** Status Update creation can also be enabled or disabled and is configured separately. For more information, see [Configuring user update settings](#) on page 155.

---

## Creating community-wide announcements

Community-wide announcements are displayed for all users under Community Announcements and as banners at the Home page.

---

**Fastpath:** **User interface: Your Avatar > System Announcements > Add a new announcement**

---

You can create a system announcement to be displayed for all users on the upper right of all Activity pages, under the Community Announcements heading and above Recommendations. Each announcement is also displayed as a banner at the top of the Home Page. If multiple announcements are set to be displayed at the same time, users can click through them in a predetermined sequence.

You can preview the images and text in your announcement as you create it.

You must have Manage Community permissions to create community-wide announcements.

To create a community announcement and determine the order the announcements are displayed in:

1. In the user interface, click on your avatar in the upper right corner and select **System Announcements**.
2. Click **Add a New Announcement**.
3. If you want to feature a URL in your announcement, select the **Announce a link** check box and enter the URL in the box.

Jive automatically detects the page title and suggests a display title and image from the linked page. You can choose to use these or replace them with your own title and image as described in the following steps.

4. In **Title**, enter the announcement title.

This is the heading users see when deciding whether to expand the announcement, so you should make it short enough to be scanned easily.

5. Optionally, add an image. Select the **Include an image** check box and upload an image.

You can upload an image by browsing, or use drag and drop. You can see the image in preview on the right after you select it. However, it is not visible in the preview unless the **Include an image** check box is selected.

6. In **Description**, add a short text description with further details of the announcement.

Again, shorter is better, since announcements are designed to fit in a small space. If you want to link to further details, you can put a URL in the description text. However, you can't currently put a named link in the announcement text. To feature a URL in your announcement, use the **Announce a link** feature, which links the URL to your announcement title.

7. Decide how long the announcement should be displayed by selecting a start and end date in **Begins** and **Expires**.

Announcements start at 12:00 (AM) on the start date and expire at 23:59 on the end date, in the announcement creator's time zone.

8. Decide whether to send a notification about the announcement by selecting or clearing the **Send Inbox notifications** check box.

Users who have their Inbox: Activity preference set to provide email notifications (this is the default setting) receive an email as well as seeing the announcement displayed in Activity pages.

9. Click **Save** to save the announcement.

After you save your announcement, you can return to the System Announcements page and determine the click-through order by dragging and dropping the cards. Click-through order is left to right and top to bottom. If you have rights to edit community announcements, you can edit or expire them directly by using the links directly within the announcement.

---

**Note:** Note that moderation can be enabled for system announcements in your community. In this case, the new announcements appear on the System Announcements page after they pass moderation. For more information about moderation, see [Moderation](#) on page 416.

---

Announcements are displayed from 12:00 (AM) on the start date and expire at 23:59 on the end date, in the announcement creator's time zone.

## Getting basic system information

You can get basic, system-wide information about the deployment context for Jive from the Admin Console.

You may need to provide this information when contacting Support. For more information, see [Getting started with the new Jive Support Portal](#) on Worx.

## Deployment environment

You can find information about the environment into which Jive is deployed in the Admin Console, such as the Java environment properties, operating system, uptime, and user, group, and authorization managers in use.

---

**Fastpath:** Admin Console: System > Management > System Information

---

On the **System Information** page, you can find the following information:

- **System Info** lists fundamental information about the application system, such as the application version, server, and operating system.
- **Datasource Info** lists information about the database that contains application data. This includes the database management system in use, connection information, and information about transaction support. You can edit the number of connections that the connection provider makes.
- **Java System Properties** lists properties and values of the Java environment (JVM version and Java system properties). This ranges from commonly sought information such as the contents of the library classpath the application is running with, to the character Java is using as a path separator.

## Managing deployment license

*The license you received when you purchased Jive enables the features included in your purchase, keeping your community running and available to your users. The terms of the license are based on your community's allowed usage (number of page views or users, for example), the duration of your license, and the modules your license supports.*

You can view your license type, version, capacity, current usage (how many users you're currently supporting), and license creation and expiration dates in the Admin Console.

---

**Fastpath: Admin Console: System > Management > License Information**


---

On the **Overview** tab you can find:

- Basic license information, such as your license ID and the number of members in your server cluster.
- A list of the application components you're licensed to use, along with details about when their licenses are due to expire and how much of your quota for each you've used. You can click a component's title to view more information about it, including its usage.
- Important messages about lapses in compliance with license terms.

### Resolving license-related issues

Licenses expiration reminders and warnings for the core application and modules occur by default as follows:

<b>30-day friendly reminder</b>	30 days before the license expiration date, a notification is sent to the email inbox of all system administrators.
<b>Expiration notice</b>	After the license has expired, Jive displays a notice for all system administrators in the Admin Console as well as the community warning that the license has expired (end users cannot see this notice). In addition, a notification is sent to the email inbox of all system administrators.
<b>Shutdown warning</b>	30 days after the license expiration date, Jive displays a red banner for all system administrators and root space administrators in the Admin Console and the community warning that the site will be shut down in 15 days due to the expired license (end users cannot see this notice). In addition, a notification is sent to the email inbox of all system administrators and root space administrators.

---

**Note:** The Jive core application and any modules that you have purchased and added on have different licensing time frames. You receive a number of notifications that the license has expired before the core application or module is disabled. In the case of a module, only the module is disabled, not the core application.

---

Your community might be partially disabled for the following reasons (after repeated attempts to warn you):

- Your subscription has expired.
- Your community's usage has exceeded what your license allows. The Jive application warns you when the usage level allowed by your license is being exceeded. In extreme cases, the community can be partially disabled by Jive Software. This disabling causes the community to be inaccessible to all users but administrators, who are still able to resolve the licensing issue.
- Jive Software remotely locked the community.

## Moving and copying instances

Jive's security and licensing service keeps track of your production and development environments and the licenses required for production environments.

---

**Caution:** Several features of the application rely on the jiveURL. For information about changing the jiveURL, see [Changing community URL](#) on page 27.

---

For more information about how automatic and manual license reporting works, see [Managing deployment license](#) on page 52.

If you change the URL of your instance by copying your instance (changing the `jd-bcURL` system property) or moving your instance (changing the `jiveURL` system property), the fingerprint sent to Jive's security and licensing service differs from the one already recorded. In clustered environments, the master node communicates with Jive's security and licensing service.

Your system need to try to communicate with the security service, either automatically or manually (if automatic is not available), on system startup after you've completed the move or copy wizard (which is what pops up when the system figures out you've tried to either move or copy an instance due to URL changes). If your system is unable to successfully communicate within five days, it will stop working except for the Admin Console. Note that you will be warned if automatic license verification with the security service is not an option.

Using the same license, you can:

- Move a production instance to a different server (by using a different URL)
- Copy and move a test or development environment

---

**Note:** You **cannot** copy a production instance and declare the new instance as a production instance with the same license!

---

## Setting up LDAP and Active Directory

*By default, Jive doesn't use a directory server and stores all user data in a database from where it uses it for authentication.*

*If your enterprise already uses an LDAP directory server such as OpenLDAP or Active Directory to manage users, you can configure your Jive community to integrate with it. During setup, you can choose users and groups stored in the directory server for providing them access to Jive.*

The instructions for integration assume that you are or have access to the administrator of your directory server and that you are familiar with the Jive Admin Console. If you don't have this expertise, you may want to contact Jive Professional Services or another outside resource with expert knowledge about administering a directory server.

---

**Note:** If you are using Active Directory, make sure it allows LDAP querying.

---

## LDAP Security

The Jive application database never caches or stores user credentials. However, if the LDAP system property `ldap.ldapDebugEnabled` is set to `true`, the directory server traffic can be logged, and user passwords can be exposed in plain text to the `sbs.out` log file if connections to LDAP are unencrypted (non-SSL). It is your responsibility to ensure that your LDAP communication runs over an SSL connection.

## Supported directory servers

Jive can be integrated with a variety of directory servers.

Jive regularly tests LDAP integration with the following providers:

- OpenLDAP
- Microsoft Active Directory
- OpenDS
- Sun ONE

Jive can typically assist with configurations for these providers. Troubleshooting assistance for other LDAP integrations may require engagement with Jive Professional Services.

## Overview of directory server integration steps

To set up directory server integration, you need to gather information about your LDAP server configuration, identify the location of your key directory server and tree, map your users and groups so Jive can synchronize to them, and then test your implementation to ensure it is successful.

Directory server integration relies on preparation and testing to be successful. If you use this list of overview steps to plan your integration, and if you run a test implementation to ensure that you have correctly identified the users, groups, and fields you want to sync with your Jive instance, you can avoid some frustrating missteps associated with integrating these two complex products.

## Gather information about your server configuration

To complete the integration setup, you need the following information.

- The address of your directory server and how it will communicate with Jive. If you are using Jive to host your community, you can contact [Support](#) for assistance



with setting up the connection between these servers. Make sure you account for server referrals, especially if you use Active Directory.

- The Base DN associated with the users you want to sync with Jive. You may or may not want to include all the users in your organization, so make sure your Base DN is associated with the part of the tree that includes the users you are targeting. Keep in mind that if you plan to map groups as well as users, your Base DN needs to be at a tree level that contains both users and groups. You can also narrow down your users by specifying a User DN relative to the Base DN during setup.
- The DN associated with an Administrator account that has read access to your directory server. This account does not need to be linked to a Jive user.
- The field identifiers associated with any directory service fields you want to sync to Jive profile fields. For example, the `Username` field is typically associated with the `sAMAccountName` field for Active Directory. A good method for obtaining this information for your directory server setup is to [export an LDIF file](#).
- Any LDAP filter expressions that are required to limit the number of users returned when you sync Jive to your LDAP tree. Without the filters, synchronizing to your directory server returns every user associated with the Base DN you supplied, and your Jive community may be populated with users who don't need to be there.
- The field identifiers for any groups you want to map to permissions groups in Jive. You don't need to map any groups if you are going to manage permissions entirely in the Jive community. You will also need to specify an attribute such as `member` or `memberOf` that can be used to associate users and groups.

### Connect your LDAP server with Jive instance

1. Start the directory server integration setup by going to the Admin Console and selecting **People > Settings > Directory Server Settings**.

---

**Note:** The individual fields on this page have helpful tooltips that you can access by hovering on the question mark next to the field.

---

2. Enter your connection settings and test the connection by clicking **Test Settings** at the bottom of the tab. If you cannot connect, you may need to check your credentials. The account you are binding with must have read access to users and groups for the entire subtree rooted at the base DN.
3. Click **Save** to save your connection settings and display the rest of the configuration settings in tabs.

### Map LDAP fields to Jive profile fields

1. In the **User Mapping** tab, map any Jive profile settings you want to populate from your directory server by supplying an LDAP string. Fields for which you provide a mapping are updated from the directory server whenever a synchronization takes place. For more information, see [Mapping users from a directory server](#) on page 57.
2. Click **Test Settings** to validate your mappings against the directory server. If the attribute you specified cannot be found, you see an error message identifying the problem.
3. Click **Save** to save the mapping settings.



## Synchronize permission groups

In the **Group Mapping** tab, decide whether to use and synchronize the permissions groups you have set up in LDAP or use Jive to assign users to permissions groups. (Note that group permissions have nothing to do with social groups in Jive.) You can choose to maintain some Jive-created permission groups even if you use LDAP-managed groups: however, make sure they are distinctly named.

---

### Important:

Recommendations for synchronizing permission groups:

- When syncing LDAP groups to Jive, you should sync only the groups used by Jive. If you leave the **Group Filter** with the default setting, Jive will sync *all* groups a user is assigned to in LDAP.
  - Maintaining less than 500 Jive user groups simplifies administration and minimizes any performance impact from having too many groups.
  - After mapping groups from a directory server, you need a migration strategy to switch back to Jive for maintaining groups.
- 

For more information, see [Mapping groups from a directory server](#) on page 58.

## Set up account synchronization

Use the **User Synchronization** tab to determine when and how user information must be synchronized between LDAP and Jive. For more information, see [Synchronizing LDAP users](#) on page 60.

A LDAP group is synced into Jive only when a user from that LDAP group logs into your community. So you may not see all your LDAP groups synced into the community once you create the groups, but they will be synced over some time. To minimize the impact, the sync runs in small batches after the user logs into Jive.

For more information, see [Synchronizing LDAP users](#) on page 60.

## Mapping users from a directory server

If you are provisioning users from a directory server, you can use the User Mapping tab to map selected user fields to be synched with your Jive user information.

Before you begin, make sure you have an active connection to an LDAP directory server in the **Server Configuration** tab to see the other configuration tabs.

---

**Fastpath:** Admin Console: People > Settings > Directory Server Settings > User Mapping

---

You can use the User Mapping tab to determine what information LDAP and Jive share and how they keep user information synchronized. You can also use this tab to specify how Jive identifies external users who have access to externally accessible groups, and which users marked in LDAP are disabled in Jive.

To set up User Mapping:

1. In the Admin Console, click **People > Settings > Directory Server Settings**.
2. In the **User Mapping** tab, map the user account fields to connect user accounts based on the LDAP fields to be used to create and enable a Jive account based on the directory listing.
3. If you plan to enable Externally Accessible Groups and want to identify users based on an LDAP match rather than by inviting them directly from the social group, specify a name-value pair by using the **User Type Field** and **External Contributor User Type Value** settings.
4. If you want to disable Jive user accounts by identifying them in LDAP, specify a name-value pair using the **User Disabled Field** and **User Disabled Field Value** settings.

You may do this by using a field that is predefined for this purpose, or you can use any other available name-value pair to disable users based on an attribute. You must also select **Disable federated user accounts not found in the directory** in the **User Synchronization** tab.

For example, Active Directory uses `UserAccountControl=514` to mark disabled users: you can specify `UserAccountControl` as the **User Disabled Field** and `514` as the **User Disabled Value**.

5. Specify any profile fields you want to synchronize by providing the field information from your directory.
6. If you want to narrow down the number of users to be synched, use the **User Filter** and **User RDN** fields to apply the user filters. For more information about preparing user filters, see [Overview of directory server integration steps](#) on page 55.

## Mapping groups from a directory server

If you are provisioning users from a directory server, you can maintain permission groups in Jive or use your LDAP permission groups.

Before you begin, make sure you have an active connection to an LDAP directory server in the **Server Configuration** tab to see the other configuration tabs.

---

### Important:

Recommendations for synchronizing permission groups:

- When syncing LDAP groups to Jive, you should sync only the groups used by Jive. If you leave the **Group Filter** with the default setting, Jive will sync *all* groups a user is assigned to in LDAP.
  - Maintaining less than 500 Jive user groups simplifies administration and minimizes any performance impact from having too many groups.
  - After mapping groups from a directory server, you need a migration strategy to switch back to Jive for maintaining groups.
-

---

**Fastpath: Admin Console: People > Settings > Directory Server Settings > Group Mapping**


---

To connect your LDAP groups to Jive:

1. In the Admin Console, click **People > Settings > Directory Server Settings**.
2. Make sure you defined a valid connection to an LDAP directory server in the **Server Configuration** tab.  
If you don't have a working connection established, you won't be able to see the rest of the configuration tabs.
3. If necessary, define and save user mappings. For more information, see [Mapping users from a directory server](#) on page 57.
4. In the **Group Mapping** tab, select **Use LDAP to manage Groups** and provide the group mapping information for your directory server.
5. Click **Test Settings** to validate group mappings against the directory server.
6. Click **Save** to save group mapping.

---

**Note:** A LDAP group is synced into Jive only when a user from that LDAP group logs into your community. For more information, see [Synchronizing LDAP users](#) on page 60.

---

## Using LDIF to inventory your directory

Exporting an LDIF file from your server can help you extract essential information about your LDAP settings that is useful in setting up your Jive integration.

The information you use to set up your user and group mappings for directory server integration can be exported from the directory server into a format called LDIF (LDAP Data Interchange Format). You can use this information yourself or provide it to Support.

Any LDAP directory browser provides the ability to export to and import from an LDIF file.

### LDIF output example

If you are using Active Directory, you can use the `ldifde` command line tool. For more information about `ldifde`, see <http://support.microsoft.com/kb/237677> on the Microsoft portal.

Here is an example of the `ldifde` command which yields an LDIF output:

```
ldifde -f output.txt -d ou=Jive_Users,dc=support,dc=jive,dc=com
```

The resulting LDIF output:

```
dn: CN=Cyr \, Karl,OU=Jive_Users,DC=support,DC=jive,DC=com
changetype: add
objectClass: top
objectClass: person
```

```
objectClass: organizationalPerson
objectClass: user
cn: Cyr , Karl
sn: Cyr
physicalDeliveryOfficeName: Awesome
givenName: Karl
initials: KC
distinguishedName: CN=Cyr \, Karl,OU=Jive_Users,DC=support,DC=jive,DC=com
instanceType: 4
whenCreated: 20081119215504.0Z
whenChanged: 20090202220617.0Z
displayName: Cyr , Karl
uSNCreated: 4391224
memberOf: CN=FilterGroup,OU=Jive_Users,DC=support,DC=jive,DC=com
uSNChanged: 4399897
department: Awesome
name: Cyr , Karl
objectGUID:: 2tnXR07VxE6zc72YqLtOTw==
userAccountControl: 66048
badPwdCount: 1
codePage: 0
countryCode: 0
badPasswordTime: 128769530029375000
lastLogoff: 0
lastLogon: 128742007081093750
pwdLastSet: 128716053043750000
primaryGroupID: 513
objectSid:: AQUAAAAAAAAUVAAAF8sUcR3r8QcekDXQw9wAAA==
accountExpires: 9223372036854775807
logonCount: 0
sAMAccountName: karl
sAMAccountType: 805306368
userPrincipalName: karl@support.jive.com
objectCategory: CN=Person,CN=Schema,CN=Configuration,DC=support,DC=jive,DC=com

dSCorePropagationData: 20081119220919.0Z
dSCorePropagationData: 20081119220919.0Z
dSCorePropagationData: 20081119220919.0Z
dSCorePropagationData: 16010108151056.0Z
mail: karl@fake.com
```

## Synchronizing LDAP users

You can manually synch users or synch them during a nightly batch job, but make sure for good performance you use the correct rules.

Before you begin, make sure you have an active connection to an LDAP directory server in the **Server Configuration** tab to see the other configuration tabs.

---

**Fastpath: Admin Console: People > Settings > Directory Server Settings > User Synchronization**

---

Typically the application is configured to synchronize a user profile to LDAP each time the user logs in to the community. Additionally, you can also run the synchronization nightly to catch up with any changes during the day. However, you may want to sync users manually when:

- You have added a number of new users in LDAP who have never logged into the community
- You want to mass-disable community users from LDAP.

To set up synchronization:

1. In the Admin Console, go to **People > Settings > Directory Server Settings** .
2. In the **User Synchronization** tab, specify the synchronization setting.
  - a) If you want to synch fields every night automatically, select **Scheduled sync task enabled**.
  - b) If you want to synchronize each user fields whenever they log in, select **Synchronize user profiles on login**.
  - c) If you want synchronization to result in user accounts that have been deleted from LDAP being auto-disabled, select **Disable federated user accounts not found in the directory**. If you check this box, you can also disable users based on matching a field value if you set the User Disabled Field and User Disabled Field Value fields in the User Mapping tab. See User Mapping for more information about these fields.
3. Click **Save Changes** to save the configuration.
4. If you want to synch accounts immediately, click **Run Synchronization Task Now**.

A LDAP group is synced into Jive only when a user from that LDAP group logs into your community. So you may not see all your LDAP groups synced into the community once you create the groups, but they will be synced over some time. To minimize the impact, the sync runs in small batches after the user logs into Jive.

## LDAP certificates

By default, your Jive instance verifies that you have a valid SSL certificate installed in the JVM if you're running LDAP over SSL. But you can change this setting and run in an insecure mode if required.

---

**Fastpath:** Admin Console: **System > Settings > System Properties** .

---

To switch the SSL certificate behavior so that a valid certificate is not required:

1. In the Admin Console, go to **System > Settings > System Properties** .
2. Under **Add new property**, set the `ldap.ssl.certverification` system property to `false` as follows:
  - a. In the **Property Name** box, enter `ldap.ssl.certverification`.
  - b. In the **Property Value** box, enter `false`.
  - c. Click **Save Property**.
3. Restart your instance.

We recommend that you change the setting back by deleting the `ldap.ssl.certverification` property from the list and restarting the instance.

## LDAP system properties

You can modify LDAP system properties to reset some elements of your LDAP configuration.

**Fastpath: Admin Console: System > Settings > System Properties .**

These settings are for expert users. To use system properties:

1. In the Admin Console, go to **System > Settings > System Properties .**
2. Edit a property if it is present in the list or add definition under **Add new property.**
3. Restart your instance after making any system property changes.

**Table 7: LDAP system properties**

Property	Meaning	Sample Values
<code>ldap.ssl.certverification</code>	The SSL certification verification switch. By default, the property is set to <code>true</code> , which verifies the SSL certificate is valid when you're running LDAP over SSL. If you set this to <code>false</code> , you can run in an insecure mode. For more information, see <a href="#">LDAP certificates</a> on page 61.	<code>true</code>
<code>ldap.serverType.id*</code>	The type of LDAP instance. Possible values: <ul style="list-style-type: none"> <li>• 2: Active Directory</li> <li>• 3: openLDAP</li> <li>• 4: other type</li> </ul>	2
<code>ldap.host*</code>	The hostname or IP address of the LDAP server.	<code>ldap.jive.com</code>
<code>ldap.port*</code>	The port number of the LDAP server.	389 (default) or 636 (SSL)
<code>ldap.usernameField*</code>	The LDAP field name used to look up user name values.	<code>uid</code>
<code>ldap.baseDN*</code>	The Distinguished Name of the base of your LDAP tree.	<code>DC=support,</code> <code>DC=jive,</code> <code>DC=com</code>
<code>ldap.nameField^</code>	The element key for the name attribute.	<code>cn</code>
<code>ldap.firstNameField^</code>	The element key for the First Name attribute.	<code>givenName</code>
<code>ldap.lastNameField^</code>	The element key for the Surname attribute.	<code>sn</code>

Property	Meaning	Sample Values
<code>ldap.emailField*</code>	The element key for the Email attribute.	<code>mail</code>
	The property that specifies whether to enable connection pooling.  For more information, see Connection Pooling Configuration in the Oracle Help Center at <a href="http://download.oracle.com/javase/jndi/tutorial/ldap/connect/config.html">http://download.oracle.com/javase/jndi/tutorial/ldap/connect/config.html</a> .	<code>true</code>
<code>ldap.followReferrals</code>	The property that specifies whether LDAP queries will follow referrals. This property should always be set to true for Active Directory.	<code>true</code>
<code>ldap.adminDN*</code>	The DN for the LDAP admin user. This user does not need to be a Jive user.	<code>CN=Admin-Man,OU=Domain Users,DC=support,DC=jive,DC=com</code>
<code>ldap.adminPassword*</code>	The encrypted password for the LDAP admin.	<code>a54313f2d3bc98fb5234566</code>
<code>ldap.adminPassword.key*</code>	The key used to encrypt the admin password.	
<code>ldap.adminPassword.encrypted*</code>	The property that specifies whether or not the Admin password is encrypted. This property should always be set to true.	<code>true</code>

Property	Meaning	Sample Values
<code>ldap.ldapDebugEnabled</code>	<p>The property that specifies whether LDAP debug logging is on.</p> <hr/> <p><b>Caution:</b> If <code>ldap.ldapDebugEnabled</code> is on (<code>true</code>), LDAP traffic can be logged, and user passwords can be printed in plain text to the application's <code>sbs.out</code> log file if connections to LDAP are unencrypted (non-SSL). It is your responsibility to ensure that your LDAP communication runs over an SSL connection.</p> <hr/> <p><b>Important:</b> LDAP logging is extremely verbose and should never be used in production unless recommends it. Using debug mode can cause serious performance problems or system failure.</p> <hr/>	<code>false</code>
<code>ldap.sslEnabled</code>	The property that specifies whether to use an SSL connection to communicate with the LDAP server.	<code>false</code>
<code>ldap.initialContextFactory</code>		
<code>ldap.searchFilter</code>	The filter the is applied to a remote directory when searching for users.	
<code>ldap.groupNameField</code>	The field that maps a group to its CN in LDAP.	<code>cn</code>
<code>ldap.groupMemberField</code>	The field that maps a group to its members.	<code>member</code>
<code>ldap.groupDescriptionField</code>	The field that maps a description of a group.	<code>description</code>
<code>ldap.posixMode</code>	The property that specifies whether to connect to LDAP in POSIX mode. POSIX groups store their member associations by common name (CN) rather than full distinguished name (DN).	<code>false</code>



Property	Meaning	Sample Values
<code>ldap.posixEnabled</code>	The property that specifies whether to connect to LDAP in POSIX mode. POSIX groups store their member associations by common name (CN) rather than full distinguished name (DN).	<code>false</code>
<code>ldap.groupSearchFilter^</code>	The filter that is applied to a remote directory when searching for groups.	<code>(object-Class=group)</code>
<code>ldap.managerField</code>	The field that maps the DN of a user's manager. This is used when syncing relationship fields.	<code>manager</code>
<code>ldap.photoField</code>	The field that maps a photo to a user's profile.	<code>photo</code>
<code>ldap.lastUpdatedField</code>	The field that is used to check if an LDAP record has been updated since the most recent sync.	<code>creationdate</code>
<code>ldap.userGroupMember^</code>	The field that maps a user to a group. This is a user attribute.	<code>memberOf</code>
<code>ldap.userDN^</code>	An RDN (relative to the baseDN) which contains users to sync to SBS.	<code>ou=People</code>
<code>jive.sync.user.ldap</code>	The property that specifies whether user synchronizations are enabled.	<code>true</code>
<code>jive.sync.relationships.ldap</code>	The property that specifies whether user relationships are synchronized from LDAP.	<code>false</code>
<code>jive.sync.profile.ldap.photo</code>	The property that specifies whether profile photos are synchronized from LDAP.	<code>false</code>
<code>jive.sync.profile.ldap.login</code>	The property that specifies whether profiles are synchronized at login.	<code>false</code>
<code>jive.sync.auto.disable</code>	The property that specifies whether Jive should disable user accounts which cannot be found in the LDAP directory.	<code>true</code>
<code>jive.sync.auto.disable.att.name</code>	The name of the attribute which indicates whether or not an account is disabled in LDAP.	<code>userAccountControl</code>

Property	Meaning	Sample Values
<code>jive.sync.auto.disable.att.value</code>	In Active Directory, UserAccountControl flags. For reference for setting user account properties, see Microsoft article 305144 ( <a href="http://support.microsoft.com/kb/305144">http://support.microsoft.com/kb/305144</a> ). You can also set up a bit-specific filter such as: <code>userAccountControl:1.2.840.113556.1.4.803:=2</code>	514
<code>jive.usernames.case.insensitive</code>	The property that specifies if case sensitive comparisons are made when users register or log in. If this is set to <code>false</code> , sensitive comparisons are enabled; for example, <b>bbrag</b> is a different user than <b>BBragg</b> . If this is set to <code>true</code> , there is no distinction between <b>bbragg</b> and <b>BBragg</b> . You may need to set this property to <code>false</code> when existing usernames in your Lightweight Directory Access Protocol (LDAP), Active Directory (AD), or Single Sign-On (SSO) are case sensitive.	<code>true</code>
<code>GroupManager.className</code>	The property that controls whether or not permission groups are synchronized from LDAP.	<code>com.jivesoftware.base.ldap.LdapGroupManager</code> (for LDAP groups) <code>com.jivesoftware.base.database.DbGroupManager</code> (default group manager)

## Setting up Single Sign-On

Single Sign-On (SSO) allows you to integrate Jive authentication with an external identity provider.

You can use Jive's local database storage to authenticate users out of the box; this is a default setting. However, you may find it useful to integrate your external identity provider with Jive so you can centralize identity management and provide your users with a consistent login experience. We recommend you to implement SSO as part of a larger audience profile synchronization effort that includes LDAP and SAML.

## Getting set up

If you already have a Jive community with more than a few users set up, you need to plan a migration strategy before you implement SSO, particularly if you plan to use SAML or Kerberos. If you implement SSO without migrating users first, you orphan your existing users — information they contributed to the community still exists, but they are unable to log in under the credentials that created that content. If you need help migrating your user data to another authentication scheme before you enable SSO, you should contact Jive Professional Services.

## Understanding SSO with SAML

When you implement single sign-on (SSO) with SAML 2.0, information for each user is passed from the identity provider in the form of a digitally-signed XML document.

SAML is a protocol for exchanging authentication credentials between two parties, a service provider (SP) and an identity provider (IdP). In this case, Jive plays the role of SP. The SP sends a request for authentication to the IdP, which then tries to authenticate the user. Authentication typically uses a username and password. The IdP typically also contains user information such as login ID, name, email address, department, and phone. After authenticating the user, the IdP then sends a SAML XML response message back to the SP, which then logs the user in.

Depending on your requirements, you can use SAML solely for authentication users; for group authorization; or for populating the Jive profile by synchronizing from the IdP on login.

Jive authentication through SAML includes the following stages:

1. A user visits Jive and requests a page that requires authentication.
2. Jive redirects the user to the configured IdP. The request URL includes a base64-encoded version of the request XML.
3. If authentication doesn't succeed, the user sees a login screen.
4. The IdP sends an encoded XML-based response in a redirect to Jive. If the user was successfully authenticated, this response includes the information we need to create a Jive representation of the user.
5. Jive parses the XML and validates the necessary signatures, decrypting if necessary. A valid response from the IdP at this point indicates the user has been successfully authenticated.
6. Jive parses the XML response from the IdP and creates or updates the user, using any override attributes you specified in Jive. If users have been seeded beforehand and shouldn't be updated, profile sync can be disabled.
7. The user is authenticated with Jive and redirected to the requested destination.

## Getting ready to implement SAML SSO

Before you begin configuring a SAML SSO implementation, you should know the requirements and best practices.

A successful SAML implementation requires the following prerequisites.

- SAML is a protocol for exchanging authentication credentials between two parties, a service provider (SP) and an identity provider (IdP).
- An identity provider that complies with the SAML 2.0 standard. You should make sure you have required knowledge of how to configure your identity provider before proceeding.

For more information, see [SAML identity providers](#) on page 70.

- Familiarity with the SAML 2.0 specification. Before you begin the process of configuring Jive as a SAML 2.0 service provider to your IdP, you need to understand that the details of how SAML works. Alternatively, you should enlist the assistance of a SAML professional. For more information about SAML, see Oasis SAML Technical Overview (.pdf) at <http://www.oasis-open.org/committees/download.php/27819/sstc-saml-tech-overview-2.0-cd-02.pdf>.

## SSL implementation

It is theoretically possible to implement SSO without SSL, but this raises some difficult security challenges. You should implement SSL and set your `jiveURL` to `https`, not `http`.

## Disable storage provider file system caching

Before you begin setting up SAML, you should disable caching to be able to modify your IdP metadata.

To disable caching:

1. In the Admin Console, go to **System > Settings > Storage Provider**, and then
2. Under **Caching**, click **Edit**.
3. Under **Cache Enabled**, select **No**, and then click **Save**.

## LDAP integration

If you're going to use LDAP in conjunction with SAML, we recommend using SAML for authentication only, while using LDAP for user provisioning, user deprovisioning, and profile synchronization.

LDAP setup can be a lengthy process including VPN setup and testing, so allow time for this setup process if you're implementing LDAP as part of your SSO implementation. For more information, see [Setting up LDAP and Active Directory](#) on page 54.

## Migrating existing users

If you already have existing users on your community and have not yet implemented SAML, the best practice for migrating users is to enable **Username Identity** to look up existing users by username. In most cases, you should also enable **Merge Local Users** to ensure that existing users are automatically federated. This recommendation assumes that either the email address or the username matches between existing accounts and the SAML response. If neither of those fields matches, you can:

- Update the existing email addresses in Jive before using Username Identity to sync them.
- Update the usernames in Jive before using the username identity to sync them.
- Add the external IDs in Jive and federate the users by using another method.

You can use the REST API or, if you need more assistance, a partner or Professional Services can handle this by creating a database script.

If you have non-federated local users that you do not want to merge, you should not select **Merge Local Users**. Instead, mark only the accounts you want to merge as federated before enabling Username Identity.

## Required information

Before you begin the configuration process, you must have the following information available:

- The IdP metadata (URL location or file content). Specifying a URL usually makes updates easier.
  - The IdP entity ID
  - The IdP KeyInfo element
  - The IdP Location that defines your endpoints

If you can't verify that this information is included, contact your IdP administrator.

---

**Note:** To integrate Jive with SAML, you need the complete metadata file, not just the information described above.

---

- The friendly attribute names sent with each SAML assertion.

## Planning for Jive user provisioning and profile synchronization

When you implement SAML, you need to decide on a strategy for which members of your organization must be included in the your community, and with what rights. For example, you need to decide whether all your organization users should be able to create accounts in the Jive community and whether you assign them to user groups for authorization. If you're primarily responsible for the technical implementation of this feature, you should discuss these decisions with your Community Administrator.

## SAML identity providers

Jive can be integrated with a wide variety of SAML IdPs.

### Commonly used IdPs

Jive regularly tests SAML support with integrations to the following IdPs:

- |                       |  |
|-----------------------|--|
| <b>Microsoft ADFS</b> | This is the most common SSO provider used by our customers. For more information, see <a href="http://msdn.microsoft.com/en-us/library/bb897402.aspx">http://msdn.microsoft.com/en-us/library/bb897402.aspx</a> at the Microsoft portal. |
| <b>Shibboleth</b>     | This is the open-source standard for IdPs. For more information, see <a href="http://shibboleth.internet2.edu/">http://shibboleth.internet2.edu/</a> .   |

We can typically assist with configurations for these providers. Troubleshooting assistance for other IdP integrations is available through Jive Professional Services.

### Configuring IdPs for SSO

Certain IdPs require special configuration before you can set up SAML SSO.

The following list describes some known configuration prerequisites for specific IdPs.

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**Note:** We do not provide a complete description of required IdP configuration for your identity provider.

---

#### ADFS

- |  |   |
|--|---|
| <b>Set the expected digital signature to SHA-1</b> | ADFS expects the digital signature to be SHA-256, but Jive sends it as SHA-1. To change this expectation, go to the <b>Advanced</b> tab of your <b>Relying Party Trusts</b> profile and set the secure hash algorithm to SHA-1. |
|--|---|

#### Siteminder

- |  |   |
|--|---|
| <b>Use the Jive <code>entityID</code> as the Siteminder profile name</b> | Typically, the Jive <code>entityID</code> , which is set by using the Base metadata URL in the <b>Advanced</b> tab of your SAML SSO settings, is the same as the <code>jiveURL</code> . |
|--|---|

## Configuring SSO with SAML

Here you can find SAML configuration for your community. You can set up single sign-on with a SAML identity provider, or enable, disable, or tweak a configured SAML SSO configuration.

---

**Fastpath:** **Admin Console: People > Settings > Single Sign-On > SAML**

---

For more information, see [Understanding SSO with SAML](#) on page 67.

**Caution:** Before you configure SSO, make sure you have a migration strategy for any existing Jive users. Implementing SSO without migrating your users to your new authentication provider will orphan existing user accounts, so users can't access their community content. For more information, see [Getting ready to implement SAML SSO](#) on page 68.

---

## Setting up the IdP connection

To begin setting up the connection between Jive and your identity provider:

1. In the Admin Console, go to **People > Settings > Single Sign-On > SAML**.
2. On the **IDP Metadata** tab, paste in the XML containing the connection metadata.
3. Click **Save All SAML Settings** to load the XML.
4. On the **User Attribute Mapping** tab, map the user attributes in the Jive profile to your IdP's attributes.

Note that importing or saving your metadata populates the **General** tab with a list of attributes from your IdP, so you can use it as a reference when you specify the attributes you want to map. For more information, see [User attribute mapping](#) on page 71.

5. If you want to assign users to groups by passing a special group attribute from your IdP to Jive, select **Group Mapping Enabled**.
6. Click **Save Settings**.
7. Click **Download Jive SP Metadata** at the top right of the **SAML** tab to download the Service Provider metadata you need to complete your IdP-side configuration.

## User attribute mapping

User attribute mapping is used to identify fields in the Jive profile that you plan to populate from the IdP profile by synchronizing them on login.

- To map a field, specify the exact IdP attribute used to identify it in the text box, and then select the **Federated** check box.

Any fields you don't map are user-configurable in the Jive profile settings. Any field that you specify, but do not mark as federated, is populated with the specified value but still configurable.

By default, Jive uses the `NameID` property as the unique key identifier for a user. You can select **Override Subject NameID for Username** and specify a different attribute if you want to use a different key identifier.



## Group mapping

You can assign users to user groups for authorization automatically by passing a special group attribute from the IdP to Jive.

- To enable user group mapping and provide the attribute, select **Group Mapping Enabled** on the **Advanced** tab.

The group mapping attribute is used to get user group names from each assertion. If the corresponding user groups with these names do not exist, they are created when you synchronize, and users are added to these groups. Note that SAML SSO does not support mixed group management. You can either manage your permissions groups using the IdP, or by using user groups created in Jive.

## SAML SSO group mapping

You can manage your user groups by using either your IdP or local permissions groups. You can also use a mix of both kinds of groups. Only federated permissions groups are managed by using SAML.

---

**Fastpath:** **Admin Console: People > Settings > Single Sign-On > SAML > Advanced**

---

To manage groups with SAML, you initially enable group mapping and provide the group mapping attribute. You can assign users to security groups automatically by passing the group mapping attribute from the IdP to Jive. This attribute is used to retrieve security group names from each assertion. If a group specified within the group mapping attribute doesn't already exist in Jive, it will be created when you synchronize, and the user will be added to the group. If a group specified within the group mapping attribute does already exist in Jive but is not federated, it will automatically be federated.

To manage groups using SAML:

1. In the Admin Console, go to **People > Settings > Single Sign-On > SAML > Advanced**.
2. Select the **Group Mapping Enabled** check box and provide the group mapping attribute in **Group Name Attribute**.
3. In the SAML response, pass the name of each group in the response for each user. Each group name should be listed as a separate attribute value as shown in the following example:

```
<Attribute name="groups">
  <AttributeValue>groupOne</AttributeValue>
  <AttributeValue>groupTwo</AttributeValue>
  <AttributeValue>groupThree</AttributeValue>
</Attribute>
```

The groups you specified in the `groups` attribute will automatically be federated when user members are synchronized at login.



## SAML SSO attribute mapping tips

Here you can find general tips on attribute mapping for SAML SSO.

---

**Fastpath: Admin Console: People > Settings > Single Sign-On > SAML**

---

### Determining your IdP's attributes

The easiest way to figure out how your IdP's attributes are set is to set the **Email** field in the **General** tab of Jive to something you know isn't in the response, like `xxxxemail`, and then look at the error message for all the available attributes in the SAML Response. Many IdPs assign both a `Name` and a `Friendly Name` to each assertion attribute. When you're setting up Attribute Mapping, you should use `Name`.

By default, user mapping uses the `SubjectNameID` attribute which defines the user name as a unique identifier to link the Jive account with the IdP identity. You can use a different attribute for either the user name or the External Identifier. The External Identifier should be a value that will remain the same even if the user name and email address change. In ADFS, this attribute will typically be the unique `objectGUID` attribute.

For ADFS, the `Name` value typically looks like a URL, for example, `http://schemas.xmlsoap.org/ws/2005/05/identity/claims/email`.

Jive doesn't support mapping to complex profile fields, such as multiple select lists or addresses.

### Minimum required mapping fields

By default, Jive user accounts require `Username`, `Email`, `Firstname`, and `Lastname` to be populated. If your SSO server will be used to generate accounts automatically on login, make sure the following fields are mapped:

- `ExternalIdentity`
- `Username`
- `Email`

### Mixed-mode authentication

You can configure Jive so that it allows you to use SAML SSO for some users, and forms authentication for others. The Login Entry Page settings determine the initial login page wording if you have enabled externally accessible groups, or if your community uses SAML SSO, and you have also enabled form-based authentication for non-SSO users.

---

**Fastpath: Admin Console: People > Settings > Single Sign-On > Login Entry Page**

---

Mixed-mode authentication assumes that some of your users are provisioned from a SAML IdP, and others will be self-registered or created by another method. These two kinds of users will access the application via different login pages.

You can use the Login Entry Page settings to customize how different users experience the login page. You can use the default wording provided, or edit the wording in all the supported languages. When users access the login page, their browser settings determine which language they see.

To set up mixed-mode authentication:

1. Set up SAML SSO as described in the documentation.
2. In the Admin Console, go to **Advanced Settings > People > Settings > Login Settings > Enable Form-based Login** and select **Enabled**.
3. Click **Save Settings**. This enables a dual login page since SSO users will log in differently than non-SSO users.
4. Go to **People > Settings > Single Sign-On > Login Entry Page** and provide text for each type of login. By default, the application shows the options as employee and non-employee, but you can customize the text to guide your users to the correct login.

## Login pages

The Login Entry Page settings determine the initial login page wording if you have enabled externally accessible groups, or if your community uses SAML SSO, and you have also enabled form-based authentication for non-SSO users.

---

**Fastpath:** Admin Console: **People > Settings > Single Sign-On > Login Entry Page**

---

If you enabled non-SSO users to use your site by using the form-based login, or you enabled externally-accessible groups, you can use the Login Entry Page settings to customize how different users experience the login page. You can use the default wording provided, or edit the wording in all the supported languages. When users access the login page, their browser settings determine which language they see.

To configure the login entry page:

1. Make sure SAML SSO is configured in your community.
2. Enable external groups, as described in [Enabling external groups](#) on page 369, or enable the form-based login, as described in [Mixed-mode authentication](#) on page 73.

Now the **Login Entry Page** tab becomes available on the **People > Settings > Single Sign-On** page.

3. In **Language**, select the language you want to edit and change the text to how you'd like it to appear on the initial login page.

This is the page users see the first time they navigate to the site directly, as opposed to clicking through from an invitation.

4. If required, change the text for all the languages your users typically use when accessing your site.

You can change the page title and the field labels as well as the explanatory text. Community user instructions and external user instructions are both displayed at the same time, in different regions of the page. You can see what this looks like, and preview any changes you make, using the **Preview Pre-login Page** button. Note when you design your text that your regular community users are typically logged in automatically by using SSO, while external users need to provide user name and password to access the site.

5. Click **Save**.

If you want to revert to the original text at any time, you can click **Reset to Defaults**.

## General SAML integration settings

Here you can find the general settings reference of the SAML SSO configuration.

---

**Fastpath:** **Admin Console: People > Settings > Single Sign-On > SAML**

---

On the **SAML > General** tab of the **Single Sign-On** page, you can find the most commonly used SSO configuration properties.

<b>Enabled</b>	Enable this setting to enable SAML SSO for your community.
<b>Debug Mode</b>	Enable this setting to provide detailed logging for troubleshooting authentication problems. You need to enable this setting during setup and validation, but turn it off in production.
<b>Username Identity, Merge Local Users</b>	<p>Enable the Username Identity setting if you have existing users in Jive and you are newly implementing SAML. You don't need to enable it if all your accounts are created through SSO auto-provisioning.</p> <p>Jive uses a permanent, unique identifier (<code>External ID</code>) to connect existing users with their SSO login. If users have never logged in by using SSO, they will not have an associated <code>external ID</code>. When <b>Username identity</b> is enabled, Jive maps any existing federated users to an existing user account using their username or email address during their first SSO login.</p> <p>To automatically federate existing users on login, you should also enable <b>Merge Local Users</b>. If you use <b>Username Identity</b> without enabling <b>Merge Local Users</b>, make sure your existing users are marked as federated users. Otherwise, non-federated users will not be synchronized.</p>
<b>Provision new user account on login</b>	Enable this setting to ensure that when a new user logs in, the user account is automatically created within Jive. This setting is enabled by default and should not be disabled unless you add users to the Jive community before enabling SSO.
<b>Enable disabled user account on login</b>	Enable this setting to reen able disabled user Jive accounts when they log in.

**Sync user profile on login**

Enable this setting to update users based on the remote user profile each time they log in.

**Sign Assertions**

This option is enabled by default. It requires that to pass validation, the `AuthnResponse` must have a valid signature on the Assertions within the Response. If the Response itself is signed, it also requires the signature to be valid. At the same time, it does not require that the Response be signed.

Clearing the check box enforces that the Response must be signed, and any signature on the Assertions is ignored. Most IdPs sign the Assertions section in the `AuthnResponse`. If you use SFDC, however, you should clear this check box, because SFDC only signs the entire Response.

**SSO Service Binding**

Define whether Jive should send the request to the IdP with an HTTP GET Redirect or a POST. The default service binding is `urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST` which is used commonly. To use this binding, you must ensure that a Location binding with this value is in the IdP metadata. POST is typically preferred to Redirect because some browser versions and some firewalls have restrictions on the length of the HTTP path.

---

**Note:** If you're configuring ADFS, note that using POST can cause problems for users on Safari.

---

**Logout URL**

By default, `/sso/logged-out.jspa` is a page that doesn't require authentication. If guest access is disabled, users need to land on a non-authentication-requiring page. Otherwise, they'd be automatically logged in again.

If guest access is enabled, you can set this value to `/index.jspa` to redirect the user back to the instance homepage, but as a guest user instead of as the account they were logging out of. Another option is to set it to the IdP logout URL so that the user is logged out of both Jive and the IdP. We do not support the SAML Single Logout (SLO) protocol.

Changing this setting requires you to restart the Jive server.

---

**Note:** If you specify a relative URL as the logout URL, such as `/sso/logged-out.jspa`, it needs to be a unique substring among all URLs within Jive, because any URL that matches this string will not trigger the SSO process. For example, setting the string to `/` is a bad choice, because this value would match all URLs in Jive and entirely prevent SSO from working.

---

**Maximum Authentication Age**

Identifies the maximum session time (in seconds) that's set for the IdP. The default setting is 28800 seconds, or 8 hours. However, to avoid login failures, you need to set this to match the maximum session set on the IdP.

<b>Response Skew</b>	Specifies the maximum permitted time between the timestamps in the SAML Response and the clock on the Jive instance. The default value is 120 seconds. If there is a significant amount of clock drift between the IdP and Jive, you can increase this value. The same value is also used for the skew in the <code>NotBefore</code> check in the response. If you see an error indicating a problem with the <code>NotBefore</code> check and you aren't able to fix the clock difference problem, you can try increasing this value. However, increasing the response skew value can increase your security risk.
----------------------	---

## Advanced SAML integration settings

The settings on the Advanced tab are used to refine and troubleshoot a SAML integration.

---

**Fastpath:** Admin Console: People > Settings > Single Sign-On > SAML

---

On the **SAML > Advanced** tab of the **Single Sign-On** page you can find the less commonly used SSO configuration properties.

<b>Request Signed</b>	This setting determines whether the SAML request is signed or not. Enabling this setting can increase security, but it's incompatible with some IdPs. This setting is disabled by default.
<b>Base metadata URL</b>	This value sets the desired URL for the <code>entityID</code> and endpoint URLs. This URL should be an <code>https</code> . If you aren't using a URL with <code>https</code> , you need to get help from <a href="#">Support</a> to continue setting up SSO.
<b>Force Authentication</b>	This setting forces any user with an existing IdP session to log in again.
<b>Passive Authentication</b>	When guest access is enabled, this issues a SAML AuthnRequest upon first access with <code>isPassive=true</code> , which should cause the IdP to redirect back to Jive if the user doesn't have an active session with the IdP.
<b>NameID Format</b>	For most IdPs, using the default setting is correct.
<b>NameID Allow Create</b>	By default, this check box is cleared. You should leave it cleared unless you receive an error about NameID creation while setting up your SAML integration.
<b>Sign Metadata</b>	Specifies that metadata should be signed. You should clear this check box unless your IdP requires that the metadata is signed. If you use ADFS, you must clear this check box.
<b>IDP Want Response Signed</b>	Adds a configuration to the SP metadata that tells the IdP that the SAML response should be signed, instead of only the assertions within the response. You should not enable this setting unless <a href="#">Support</a> recommends it.
<b>Requested AuthnContext</b>	Along with Requested AuthnContext Comparison, this optional setting is used to add additional information to requests in certain specific cases. It's disabled by default.

<b>Requested AuthnContext Comparison</b>	Along with Requested AuthnContext, this optional setting is used to add additional information to requests in certain specific cases. It's disabled by default.
<b>RSA Signature Algorithm URI</b>	Defines the algorithm that is used in the digital signatures within the SAML messages. Most IdPs use the default value of the namespace, as specified at <a href="http://www.w3.org/2001/04/xmldsig-more#rsa-sha256">http://www.w3.org/2001/04/xmldsig-more#rsa-sha256</a> . You may need to change this value if your IdP uses a different algorithm.
<b>Group Mapping Enabled</b>	Enable this property if you plan to use one of the SAML Response Assertion Attributes to synchronize the user into Permission Groups. For more information, see <a href="#">SAML SSO group mapping</a> on page 72.
<b>Require Valid Metadata</b>	Use this setting to determine whether the IdP metadata which you provide to Jive should be validated with respect to any <code>validUntil</code> timestamps. Some IdPs generate metadata with arbitrary <code>validUntil</code> timestamps on their metadata, which can cause validation to fail and keep Jive from running.
<b>Include Scoping</b>	Some IdPs may require a scoping definition. This option is disabled by default. If you use ADFS, it must remain disabled.
<b>Proxy Count</b>	This setting specifies the maximum number of proxies any request can go through in the request to the IdP. The default value is 2. If your IdP needs more than two proxy redirects, adjust this value accordingly.
<b>Validate InResponseTo</b>	Defines if <code>InResponseTo</code> is validated from incoming SAML responses. By default, the setting is enabled.

## Troubleshooting SAML SSO

Running SSO in debug mode can help you troubleshoot your integration.

---

**Fastpath:** Admin Console: People > Settings > Single Sign-On > SAML

---

You can enable the debug mode by selecting the **Debug** check box on the **Single Sign-On > SAML** page. You should disable this setting in production.

### An attribute is missing or was mistyped

In the following sample error message, the name of the attribute configured for the user email address was named `email`, but that doesn't exist in the saml message. In this example, `MAIL` is the name of the correct attribute.

```
com.jivesoftware.community.aaa.sso.SSOAuthenticationException: User did not have
the required attributes send from the identity provider. Missing attribute: email.
Given attributes: [MAIL, title, companyname, FIRSTNAME, LASTNAME]
```



## "Missing attribute" field in an error message is blank

If Jive is trying to sync a single name as `Firstname` and `Lastname`, you will see a message like this:

```
com.jivesoftware.community.aaa.sso.SSOAuthenticationException: User did not have the required attributes send from the identity provider. Missing attribute: .
```

To work around this problem, set the system property `saml.nameField` to the same attribute the first name is populated from.

## Authentication works on some nodes, not others

You may discover that the certificates in the metadata for each node are different: Jive metadata won't be the same on each node and so authentication succeeds on some nodes and fail on others. To verify that the same key is being used on each node, go directly to the `/saml/metadata` path for each node.

This problem occurs when the Storage Provider File system caching is enabled. To disable it, go to **System > Settings > Storage Provider**, click **Edit**, and then select **No** under **Cache Enabled**.

## "Responder" message

A status message in the following format indicates a problem with your IdP configuration.

```
<samlp:Status>
<samlp:StatusCode
Value="urn:oasis:names:tc:SAML:2.0:status:Responder"/>
<samlp:StatusMessage>something_is_wrong</samlp:StatusMessage>
</samlp:Status>
```

## An assertion fails on the notBefore condition

If the IdP clock is ahead of the Jive clock by even a second, the `notBefore` check fails and you get the following message:

```
Assertion is not yet valid, invalidated by condition notBefore ?
```

This problem can be caused by clock drift on either end, but you can also try addressing it by adjusting the Response Skew setting in the General SSO settings. For more information, see [Response Skew](#) on page 77 in [Configuring SSO with SAML](#) on page 70.

## username doesn't exist in attribute

If the attribute with the username does not exist, you can see the following message:

```
ERROR org.springframework.security.saml.SAMLProcessingFilter - There was an error during SAML authentication
    java.lang.IllegalArgumentException: [Assertion failed] - this argument is required; it must not be null
```

The attribute may be located in the `Subject NameID` instead, in which case you should make sure the `Override Subject NameID for Username` checkbox is cleared on the **General** tab of your SAML settings. Otherwise, you may need to add the `username` attribute to the SAML message.

## Content could not be saved due to an error

If a user's authentication session expires, the following message can be seen:

Your content could not be saved due to an error. You may have been logged out. If this problem persists please contact your system administrator. Click here to refresh this page.

For example, this error may happen when a user drafts a document and stays there for more than defined by the `auth.lifetime` system property. In this case, the user should login again.

## IdP-Specific SAML SSO issues

Some problems and workarounds only apply to specific IdPs.

### ADFS

**Responder error with details mentioning the Scoping element**

To fix this problem, select the **Include Scoping** check box in Advanced Settings. For more information, see [Advanced SAML integration settings](#) on page 77.

### PingFederate

**A UAT instance doesn't work in the same browser where a production SSO IDP session existed**

This problem is caused by a session cookie handling problem. You can work around it by always creating a new browser session before testing in UAT.

### Siteminder

**IdP metadata won't save in Jive**

OpenSAML has a bug where the `validUntil` timestamp on the IdP metadata's `IDPSSODescriptor` is checked incorrectly, and will only pass validation if the timestamp is invalid. The workaround is to remove the `IDPSSODescriptor validUntil` attribute from the metadata.

**AudienceRestriction attribute contains incorrect or multiple entityIDs for Jive instance**

This problem occurs when the SP profile name in SiteMinder is not the same as the `entityID` in Jive, causing a validation error.

## Understanding SSO with Kerberos

When you implement single sign-on (SSO) with Kerberos, LDAP handles all the authorization and user synchronization, while Kerberos handles authentication.

---

**Note:** Kerberos is only supported with on-premise installations of Jive. It is not available for Jive-hosted communities.

---



Kerberos is an authentication protocol that is meant to be used in conjunction with an LDAP-enabled instance. LDAP handles all authorization and user synchronization, while Kerberos handles authentication. On Windows and Mac machines that are joined to an Active Directory domain, users can seamlessly log into Jive without entering a username or password, or even seeing a login screen. Users who are not logged into the domain on their computers will still see a standard login form. Because authentication uses a single token passed from the operating systems, no redirect is required. The token is verified against the configured Key Domain Controller (KDC), and if it's valid, the user is logged in.

Communication with the KDC typically uses the standard service principal string and password. However, you can also specify a keytab and krb5.conf file.

## Configuring SSO with Kerberos

---

**Fastpath:** **Admin Console > People > Settings > Single Sign-On > Kerberos**

---

### [Understanding SSO with Kerberos](#)

---

**Important:** Before you configure SSO, make sure you have a migration strategy for your existing Jive users. Implementing SSO without migrating your users to your new authentication provider will orphan existing user accounts, so users can't access their community content.

---

## Setting Up Kerberos SSO

<b>Service Principal</b>	The service principal used to communicate with the KDC and validate any user tickets passed to Jive. Typically, the Service Principal value is the user name for an account.
<b>Realm</b>	The realm for the service principal account user name you specified.
<b>(KDC) Key Distribution Center</b>	The hostname for the key distribution center. You may not need to provide this information if the realm already resolves to the KDC.
<b>Password</b>	Specifies the password for the service principal account user name you specified.

## Advanced Settings

The following settings on the Advanced tab control some less commonly used SSO configurations.

<b>Debug Mode</b>	Enable to provide detailed logging for troubleshooting authentication problems. You should disable this setting in production.
<b>Use Keytab for Authentication</b>	Enable to specify a keytab file as an alternate credentialing method. To upload your keytab file, you need to Base64-encode it and paste it into the text box provided.

**Use KRB Configuration File** Enable to specify a krb5.conf file. Then paste the file contents into the text box provided.

## Understanding SSO with external login

When you implement single sign-on (SSO) by using an external login, users can choose to log in by using Facebook Connect, or Google OpenID Connect.

External logins are a good choice for public communities because authentication can be passed to a third-party provider. The community user enters credentials on the provider site. The authentication token is then passed back and verified on the Jive side. Community users can log in with a number of different providers and have all their details pre-populated. For sites that support an avatar attribute, avatars are synchronized as well.

An external login implementation can include Facebook Connect or Google OpenID Connect authentication. Both Google OpenID Connect and Facebook Connect use the Attribute Exchange standard for exchanging information, which enables Jive to pull in profile information about new users. After logging in, the user sees a confirmation page and can verify profile information, pick a username (if this information isn't prepopulated from the profile), and proceed to the Jive community.

### Migrating existing users

If you already have existing users on your community and have not yet implemented SAML, the best practice for migrating users is to enable **Username Identity** to look up existing users by username. In most cases, you should also enable **Merge Local Users** to ensure that existing users are automatically federated. This recommendation assumes that either the email address or the username matches between existing accounts and the SAML response. If neither of those fields matches, you can:

- Update the existing email addresses in Jive before using Username Identity to sync them.
- Update the usernames in Jive before using the username identity to sync them.
- Add the external IDs in Jive and federate the users by using another method.

You can use the REST API or, if you need more assistance, a partner or Professional Services can handle this by creating a database script.

If you have non-federated local users that you do not want to merge, you should not select **Merge Local Users**. Instead, mark only the accounts you want to merge as federated before enabling Username Identity.

## Configuring SSO with external login

Here you find instruction on enabling SSO with Facebook Connect and Google OpenID Connect.

---

**Fastpath:** **Admin Console > People > Settings > Single Sign-On > External Login**

---

You can enable either external login or externally accessible groups.

**Important:** Before you configure SSO, make sure you have a migration strategy for your existing Jive users. Implementing SSO without migrating your users to your new authentication provider will orphan existing user accounts, so users can't access their community content. For more information, see [Understanding SSO with external login](#) on page 82.

---

To implement SSO for Jive with external logins, you set the **Single Sign-On > External Login** page to **Enabled**. If you disable an external login type after enabling it, Jive users will need to authenticate against Jive directly instead of using an external login.

To troubleshoot authentication problems, you can enable **Debug Mode** on the **Single Sign-On > External Login** page. You should disable this setting in production.

### Facebook Configuration

Before you can enable Facebook login, you need to create an app on the Facebook developer site. Then you should provide your app credentials (the Application ID and secret) in the Jive application to complete SSO authentication with Facebook.

To enable Facebook authentication:

1. Set up an app on the Facebook developer site. When you're creating your Facebook app, you need to provide your Jive URL for both the **App Domains** field and the **Website with Facebook Login** field.
2. Make a note of both the application id and the application secret: you need them to configure SSO.
3. In the Admin Console, on the **People > Settings > SSO > General** tab, select the **Enable Username Confirmation for New Users** check box.
4. On the **People > Settings > Single Sign-On > External Login** tab, under **Facebook**, provide the client ID and secret.

### Google OpenID Connect Configuration

Google OpenID Connect requires an ID and secret from a Google Developers Console project. You can find the instructions on obtaining the ID and secret on the Google IdentityPlatform at <https://developers.google.com/identity/protocols/OpenIDConnect>.

Google OpenID Connect replaces OpenID 2.0, which is no longer supported by Google. You should only need to specify a realm in case of a migration.

To enable SSO with Google on the Jive side:

1. In the Admin Console, on the **People > Settings > SSO > General** tab, select the **Enable Username Confirmation for New Users** check box.
2. On the **Single Sign-On > External Login** tab, under **Google OpenID Connect**, provide the client ID and secret.

## SSO global settings reference

The general SSO settings described here apply to all configured SSO implementations.

---

**Fastpath: Admin Console: People > Settings > Single Sign-On > General**

---

### **Enable Username Confirmation for New Users, Enable Email Confirmation for New Users**

Use these settings to define the behavior for new users when they first log in. When enabled, users are asked to confirm that they want to use the relevant value (username, email, or name) that is provided by the Identity Provider. They can also change these values if they wish. By default, these settings are all disabled, since in most cases the intended result is for users to be forced to use the username, email, and name defined for them in the corporate directory.

The **Enable Name Confirmation** setting has an additional application when users typically log in with either a single-word username or an email address but may need the option to provide a first and last name combination. If you select this check box, users can also modify those profile fields after initial login.

---

**Note:** These fields also apply to any users who may be logging into your community by using External ID.

---

### **Allow Federated Users to Change Name**

Use this setting if you want federated users to be able to change their names in the profile settings and have the change propagated to the IdP.

### **External Identity is Case-Sensitive**

Use this setting to determine whether the value used for the external identity should be case-sensitive. You should disable this setting in a case where the external identity value changes under different circumstances, for example when it's sometimes all lowercase or all uppercase.

## Configuring content-related settings

The settings you can find in this section are related to how the application handles content, such as setting size limits and threading for discussions, enabling search, and spell checking.

### Managing Impact Metrics

You can see Impact Metrics for documents and blog posts by default. Cloud customers or grandfathered Hosted and On-Prem customers may have Cloud Analytics enabled and also see impact metrics for discussions and videos.

Jive On-Premise and Jive Hosted installations use the Analytics database by default, but you need to configure and enable the database to use it. If you want to use Cloud Analytics and expose more Impact Metrics features, you can create a support case at [Support](#).

#### Available features with Cloud Analytics enabled

- Top departments and department filtering
- Email tracking counts
- Top referrers list
- Subscribers toggle
- Impact Metrics for discussions and videos
- Real time results

---

**Note:** You can avoid the 15-minute delay and get Impact Metrics on content created prior to it being enabled when you use Cloud Analytics service instead of the Analytics database.

---

---

**Note: Viewers in Impact Metrics** are shown based on the document selected and not based on date range. Hence, list of **Viewers in Impact Metrics** does not change even when date range filter is changed.

---

### Configuring Analytics database

You should identify the Analytics database so Community Manager Reports and Impact Metrics can use it to collect data.

Community Manager Reports and Impact Metrics data for content begins accumulating when you configure and enable the Analytics database. You cannot capture Impact Metrics data from before this happens unless you use Cloud Analytics instead of the Analytics database.

---

**Fastpath:** **Admin Console: System > Settings > Analytics** , then **Database** tab

---

To configure the database:

1. In the Admin Console, go to **System > Settings > Analytics** , then open the **Database** tab.
2. In **Database Driver Presets**, select the preset database driver.
3. In **Database URL** and **JDBC Driver Class**, enter the required setting using the pre-filled settings as an example.
4. In **Username** and **Password**, enter the database user name and password, so that Jive can establish a connection to the database.

Similar to the core database user, the Analytics database user must be able to create and modify schemas, and they must have permission to select, insert, update, and delete queries.

5. In **Min Connections**, **Maximum Connections**, **Connection Timeout**, use the default settings.

You can adjust these fields to fit your community's specific needs later, if necessary.

6. Click **Test Connection** to see if Jive can make the connection to the database.
7. Click **Save**.

## Enabling Analytics database

After configuring the Analytics database, you can enable it to start collecting impact metrics and Community Manager Reports data on documents and blog posts.

---

**Fastpath:** Admin Console: **System > Settings > Analytics**

---

To begin accumulating data from Jive in the Analytics database:

- In the Admin Console, go to **System > Settings > Analytics** , then open the **Database** tab and select **Enabled**.

## Enabling Analytics events

Once the Analytics database is configured and enabled, you need to enable all Analytics events.

---

**Fastpath:** Admin Console: **System > Settings > Analytics** , then **Events** tab

---

To enable Analytics events:

1. In the Admin Console, go to **System > Settings > Analytics** , then open the **Events** tab.
2. Select all events in the list.
3. Click **Save**.

## Managing Structured Outcomes and Badges

The Structured Outcomes feature lets users mark top-level content items, as well as comments and replies, as Final, Official, Outdated, or use another mark configured in your community. You can select which marking options community users can see, or disable them. You can also limit this feature to specific users or a group of users.

### Configuring Structured Outcomes

Users in your community can start marking outcomes when you enable the Structured Outcomes feature and select which outcomes must be available in your community.

---

**Fastpath:** Admin Console: **System > Settings > Structured Outcomes**

---

**Note:** Helpful, Correct Answers, and Assumed Answered are not part of the code base of the Structured Outcomes feature.

---

To enable and configure or disable the Structured Outcomes feature:

1. In the Admin Console, go to **System > Settings > Structured Outcomes**.
2. In **Structured Outcomes**, select one of the following:

Options	Description
<b>Enable and configure</b>	To select which badges users see, make sure that Structured Outcomes are <b>Enabled</b> , and then select the badges that to be displayed to users.
<b>Disable</b>	To disable this feature, click <b>Disabled</b> . Note that if Structured Outcomes were previously enabled and used in the community, users would still see the already marked Outcomes badges on content items; but users will not be able to mark any content items from this point forward.

3. In **Limit the marking feature to those users who are granted the "Mark Outcomes" homepage permission**, select **No** to let all users use marking.
4. In **Select which Structured Outcomes to make available in your community**, select the outcomes you want to be available in your community.
5. If required, in **Configure the thresholds for the "Most Liked" badge**, enter the thresholds for the Most Liked badge.
6. If required, in **Configure the thresholds for the "Helpful" badge**, enter the thresholds for the Helpful badge.
7. In **Configure the threshold of helpful replies required before a question is marked as Assumed Answered**, enter the threshold for the Assumed Answered badge.
8. Click **Save**.



Now all community users can use the marking feature. To limit this feature to specific users, you need to assign them the Mark Outcomes permission. For more information, see [Limiting Structured Outcomes to specific users](#) on page 88.

## Limiting Structured Outcomes to specific users

You can limit the Structured Outcomes feature to specific users, or groups of users.

---

**Fastpath: Admin Console: System > Settings > Structured Outcomes**

---

You can limit the marking ability to users with the Mark Outcomes permission and then assign this permission to particular users or user groups. Only users with this permission can see the marking options on content. Note that all users can see the badges that are assigned to any content items.

To limit the marking ability:

1. In the Admin Console, go to **System > Settings > Structured Outcomes** and make sure **Enabled** is selected.
2. Under **Limit the marking feature to those users who are granted the "Mark Outcomes" homepage permission**, click **Yes**.
3. Click **Save**.
4. Go to **Permissions > Other Content Permissions**.
5. Select the user or group of users whom you want to see the Structured Outcomes marking options.
6. Click **Edit Permissions > Mark Outcomes > Set Permissions**.
7. Repeat steps 5 and 6 for every user and user group who must have the marking ability.

## Configuring badge thresholds

You can configure when the Most Liked badge must be displayed on top-level content items, and when questions must display the Assumed Answered badge.

---

**Fastpath: Admin Console: System > Settings > Structured Outcomes**

---

The Most Liked badge is displayed on top-level content items that meet the threshold criteria set in the Admin Console. When the Most Liked badge is displayed, users can click on the badge to see the comments or replies with the most Likes.

The Assumed Answered badge is displayed on questions that do not have any replies marked as Correct Answer but do have a configurable number of replies marked as Helpful.

To change the default settings for these options:

1. In the Admin Console, go to **System > Settings > Structured Outcomes**.
2. Set the following:



Setting	Description
<b>Minimum number of comments or replies before the Most Liked badge is displayed</b>	There must be more than this number of comments on the top level content item before the Most Liked badge is eligible to display. For example, if this were set to four and a document had three comments, the document would never display the Most Liked badge, no matter how many Likes one of the comments had.
<b>Minimum number of Likes on a comment or reply to be included under the Most Liked badge</b>	For an individual comment or reply to be included in the list displayed when a user clicks the Most Liked badge, the comment or reply must have at least this number of Likes.
<b>Maximum number of replies or comments to be displayed under the Most Liked badge</b>	This is the maximum number of replies or comments that is included in the list displayed when a user clicks the Most Liked badge. For example, if you set this to 10, and there are more than 10 comments or replies that qualify to be displayed, only the 10 most-liked comments or replies are displayed in ranking order in the list.
<b>Minimum number of replies flagged as Helpful before the question is marked Assumed Answered</b>	For questions, the Assumed Answered badge is displayed on the question after this number of Helpful replies have been marked and if no replies have been marked as Correct Answer.

3. Click **Save**.

## Disabling or enabling Your View feature

The Your View feature allows your community members to create a page just for themselves that they can configure with a variety of data tiles. Your View helps community users quickly navigate to their favorite people, places, and content. This feature is enabled by default.

The Your View tab appears as a menu item in the sidebar navigation, along with the links to Inbox and Activity. If you disable Your View, the tab does not appear at all.

To disable the Your View feature:

1. In the Admin Console, go to **System > Settings > Your View**.
2. Under **Your View Feature**, select **Disabled** to turn the feature off or select **Enabled** to turn the feature on.
3. Click **Save**.

## Configuring discussions application-wide

Application-wide discussion settings control useful but performance-intensive features such as read tracking and thread mode. You can also set some aspects of how threads marked as questions should be handled.

---

**Fastpath:** **Admin Console: System > Settings > Discussions**

---

**Note:** If you're seeing a slower performance, try disabling read tracking and turning the thread mode default to Flat. Both of these features can tax performance on some configurations.

---

To configure discussions:

1. In the Admin Console, go to **System > Settings > Discussions**.
2. In **Enable Read Tracking**, select one of the following:
  - Select **Enabled** to allow users who viewed messages mark them as read.
  - Select **Disabled** to mark discussions as read automatically.
3. In **Read Tracking Age Threshold**, specify the number of days after which unanswered discussions are marked as read.
4. In **Thread Mode**, specify how replies appear:
  - **Flat**: Replies appear in a list.
  - **Threaded**: Replies are indented.

Users can override this setting by changing their preferences for discussions.

When replies reach the maximum set in the `thread.allMessageActions.messageLimit` system property) (the default is 100), replies appear flat even if you or the user has set them to appear as threaded.

5. In **Correct Answers**, select **Enabled** to allow the users mark replies as Correct Answers.
6. In **New Thread Behavior**, specify if new discussions are marked as questions by default.
7. Click **Save Settings**.

Note that after a discussion is published, by default there is a 15-minute grace period during which the author can change the discussion into a question. As an administrator, you can change the length of the grace period by editing the value (in minutes) of `questions.markAsQuestionTimeWindow` under **System > System Properties**. You may need to add the property at the bottom of the page if it is not in the list. Community administrators and place owners can mark a discussion as a question at any time (but they cannot unmark it as a question, only the author can).

For settings that control how people should be notified when a question has been unanswered for a while, see [Configuring discussions for spaces](#) on page 356.

## Discussions reference

Here you can the settings for discussions.

---

**Fastpath:**   **Admin Console:** **System > Settings > Discussions**

---

For more information on configuring discussions, see [Configuring discussions application-wide](#) on page 90.

Table 8: Discussion Feature Settings

Option	Description
<b>Read Tracking</b>	With this enabled, messages are marked as read by the person who has viewed them. You might also want to have them marked as read automatically if you have a lot of traffic and want to ensure that more recent messages get attention from readers.
<b>Read Tracking Age Threshold</b>	The number of days after which unanswered discussions are marked as read.
<b>Thread Mode</b>	<ul style="list-style-type: none"> <li>In the <b>Flat</b> mode, views display replies chronologically in the order they were received, and there is no indentation between responses.</li> <li>In the <b>Threaded</b> mode, users can see which reply a person is responding to because replies appear indented beneath the post to indicate embedded replies. This can help users follow conversations because responses remain associated together visually.</li> </ul> <p>This is a global setting for all users, but individual users can change their Discussion View Style under their General Preferences and that their preference overrides your global setting here.</p> <p>When replies reach the maximum set in the <code>thread.allMessageActions.messageLimit</code> system property) (the default is 100), replies appear flat even if you or the user has set them to appear as threaded.</p> <hr/> <p><b>Note:</b> If you're seeing a slower performance, try disabling read tracking and turning the thread mode default to Flat. Both of these features can tax performance on some configurations.</p> <hr/>

Table 9: Expert Settings

Option	Description
<b>Correct Answers</b>	<p>When enabled, you can collect stats about Correct Answers in your community, such as the number of Correct Answers on a given day. There can be only one Correct Answer per discussion. The following kinds of users can mark a reply as the <b>Correct Answer</b> on questions:</p> <ul style="list-style-type: none"> <li>Community administrators</li> <li>Owners of the place where the question was posted</li> <li>The user who posted the question</li> </ul> <p>For more information about statistics, see the Community Manager Reports Guide at .</p>
<b>New Thread Behavior</b>	

Option	Description
	<p>Determines how new discussions are created as follows:</p> <ul style="list-style-type: none"> <li>• <b>New Threads as Questions:</b> Any new discussions that are created are marked as questions when posted.</li> <li>• <b>Do Not Make New Threads Questions:</b> Any new discussions are created as Discussions when posted.</li> </ul>

Note that after a discussion is published, by default there is a 15-minute grace period during which the author can change the discussion into a question. As an administrator, you can change the length of the grace period by editing the value (in minutes) of `questions.markAsQuestionTimeWindow` under **System > System Properties**. You may need to add the property at the bottom of the page if it is not in the list. Community administrators and place owners can mark a discussion as a question at any time (but they cannot unmark it as a question, only the author can).

## Managing blogs

*A blog can be managed in several ways depending on its location. In general, a blog is managed by its author. It can also be managed by the owners of the place where the blog lives. For some blogs, including global blogs, such as system and personal blogs, you can use the Admin Console to perform some tasks, such as creating blogs and managing its comments.*

### Blogs by place

The place where the blog lives determines how you can manage permissions for the blog and how you configure its settings.

A blog can live in one of several different places, such as the system place, a social group, or a personal container. In the sections below you can find the descriptions of each type of blog.

#### System blog

- **Scope:** Is not associated with any particular space or person.
- **Creating:** Administrators can create blogs and assign people as authors so they can post to it.
- **Permissions:** Administrators can set specific permissions, such as for creating and viewing system blogs.
- **Management:** Blog authors and administrators can manage the blog.
- **System-wide settings:** Settings are shared by all blogs.

#### Personal blog

- **Scope:** Associated with a particular user, who is its owner. A user can have only one personal blog.
- **Creating:** Administrators can create a personal blog for a user from the Admin Console. A person who has been assigned permission to do so can also create their blog in the community. Only the blog's owner can post to their personal blog.

- **Permissions:** Administrators set up the ability to create personal blogs.
- **Management:** The blog's author manages the blog.
- **System-wide settings:** Settings are shared by all blogs.

### Space blog

- **Scope:** Associated with a particular space. A space can have only one blog.
- **Creating:** A person with permission to administer a space can create and manage a blog there.
- **Permissions:** Administrators can set fine-grained access for a space's blog.
- **Management:** Blog authors and space administrators can manage the blog.
- **System-wide settings:** Settings are shared by all blogs.

### Project blog

- **Scope:** Associated with a particular project (which is contained by another place).
- **Creating:** Settings are inherited from the space that contains the project.
- **Permissions:** Settings are inherited from the space that contains the project.
- **Management:** Settings are inherited from the space that contains the project.
- **System-wide settings:** Settings are shared by all blogs.

### Social group blog

- **Scope:** Associated with a social group.
- **Creating:** A person with permission to administer a social group can create a blog there. Every member of the social group has full access to the blog's features except blog management.
- **Permissions:** Permissions are not editable. They provide full access to the blog for every member of the group.
- **Management:** Group administrators can manage the blog.
- **System-wide settings:** Settings are shared by all blogs.

## Configuring blogs system-wide

The system-wide blog settings impact blogs everywhere in the community.

---

**Fastpath: Admin Console: Blogs > Settings > Blog Settings**

---

In the table below describes the available settings. For an overview of blog configuration, see [Managing blogs](#) on page 93. These system-wide settings are common to blogging software.

Setting	Description
<b>Blogs</b>	Enables or disables blogs. Disabling blogs removes blog-related elements in the user interface; people cannot create or view blogs and their posts.  If you have Enabled blogs here, you need to set the permissions for users to create blogs on <b>Permissions &gt; Blog Permissions</b> . For more information, see <a href="#">Setting up global blog permissions for user groups</a> on page 393.
<b>Comments</b>	Enables or disables blog post comments. Disabling comments makes the existing comments not visible to community users. It also removes the ability to add comments to blogs.
<b>Ping Updates</b>	Enables or disables ping updates.
<b>Ping Service URI Override</b>	Enables or disables the ability for users to customize the list of ping service URIs. When this is enabled, the blog management page for a blog provides a way for a blog's author or administrator to specify ping service URIs.
<b>Default Ping Service URIs</b>	The default list of ping service URIs. These are the URIs that are pinged by default. If you enable URI override, a blog's management page provides the option to use the defaults.
<b>Akismet</b>	Enables or disables Akismet service for filtering spam in comments. Enabling Akismet displays a place where you can enter your Akismet API key. For more information, see Akismet portal at <a href="http://akismet.com/">http://akismet.com/</a> .

## Migrating blog content

A blog can be moved between context; for example, a group blog can become a space blog. As an administrator, you can migrate an existing blog from one context to another, without restriction.

When you migrate a blog, all of the blog's posts and settings move to the destination context.

---

**Note:** Note that relocating a blog to another context can change how the blog must be managed and administered after it's migrated. For more information, see [Blogs by place](#) on page 93.

---



---

**Fastpath:** **Admin Console: Blogs > Management > Migrate**

---

To migrate a blog:

1. In the Admin Console, go to **Blogs > Management > Migrate** .
2. On the **Blog Migration page**, under **Blog**, select the blog you want to migrate.

3. Under **Destination**, select a destination:

- To migrate the blog to become a system blog at the global level, select the **System Blog** check box.
- To migrate the blog into a space, under **Communities Without Blogs**, select the space you want the blog to be in. The list is limited to spaces that don't have blogs because a space can only have one blog.
- To migrate the blog into a project, under **Projects Without Blogs** select the project you want to migrate to. The list is limited to projects that don't have blogs because a project can have only one blog.
- To migrate the blog to become a user blog at the global level, under **Users Without Blogs** enter the user name for the person whose blog it should become. A person can have only one user blog.

4. Click **Submit**.

## Configuring spell check

Jive checks spelling when users create and edit content. As a community manager, you can customize the spell check feature by using the Admin Console.

---

**Fastpath: Admin Console: System > Settings > Spell Check**

---

The spell checker uses the main dictionary you specify for all content in the community. Consider using a technical dictionary if your community creates content with terms from a specific industry.

Additionally, you can add words to your custom dictionary, so that words commonly used in your community (such as jargon or product names) won't be marked as misspelled.

To configure spell check:

1. In the Admin Console, go to **System > Settings > Spell Check**.
2. In **Main Dictionary**, specify the main dictionary for your community.
3. Under **Include Technical Dictionary?**, decide if you want to add a technical dictionary.
4. If required, under **Custom Dictionary**, specify a comma-delimited list of words which you want to add to dictionary, and then click **Add**.

## Disabling projects

You can disable the Projects feature if your community won't be using projects.

---

**Fastpath: Admin Console: System > Settings > Projects**

---



Disabling the Projects feature essentially means hiding project-related user interface elements. For example, projects won't appear on the **Create > Places** menu or the Places page.

If there are already projects in the community when you disable the feature, those projects will become inaccessible — in other words, invisible. Project data, however, won't be deleted. If you want to delete existing projects, you need to do it before you disable the feature.

---

**Note:** If you enable or disable the Projects feature, you need to restart the application for your changes to take effect.

---

To disable projects:

1. In the Admin Console, go to **System > Settings > Projects** .
2. In **Project Settings**, under **Enable Projects**, select **No**.
3. Click **Save Settings**.
4. Restart the application.

## Configuring direct messages

Direct messages allow users to send messages that are visible only to the receivers.

---

**Fastpath:** **Admin Console: System > Settings > Direct Messages and Sharing**

---

Direct messages do not appear in the Activity stream. Direct message notifications appear in the Inbox of the receiver or receivers.

You can enable or disable direct messages for users by using the Admin Console. Additionally, you can require that users must be connected to send direct messages and shares to each other. By default, direct messages are enabled.

If you need certain users to be able to override this setting, for example, your HR Director to be able to send direct messages or shares with users they aren't connected to, go to **Permissions > Home Page Permissions** and set up a user override with DM/Sharing user override permission.

To enable and configure direct messages:

1. In the Admin Console, go to **System > Settings > Spell Check** .
2. Select the **Enable direct messages** check box.
3. Select the **Require user connection** check box to required established connections between users to send direct messages and share content.

## Configuring sharing

The sharing feature allows users to alert others about interesting content items. You can enable and disable content sharing.

Shared content notifications are private and appear only in the Inbox of the receiver or receivers. Additionally, you can require that users must be connected to send direct messages and shares to each other. By default, sharing is enabled.

---

**Fastpath: Admin Console: System > Settings > Direct Messages and Sharing**

---

To enable and configure content sharing:

1. In the Admin Console, go to **System > Settings > Spell Check**.
2. Select the **Enable sharing** check box.
3. Select the **Require user connection** check box to required established connections between users to send direct messages and share content.

If you need certain users to be able to override this setting, for example, your HR Director to be able to send direct messages or shares with users they aren't connected to, go to **Permissions > Other Content Permissions** and set up a user override with DM/Sharing user override permission.

## Enabling Social Media sharing

You can enable or disable the ability of community users to share community content to a variety of social media channels, such as Facebook, Twitter, and Gmail, directly from Jive.

---

**Fastpath: Admin Console: System > Settings > Social Media Settings**

---

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

With this feature enabled, users can share documents, discussions, and blog posts on a variety of social channels. Users can even share community places if a place owner has enabled the Social Sharing widget in the place. You have the option of enabling some channels and disabling others. For more information about Social Sharing widget, see [Widget reference](#) on page 339.

By default, this feature is disabled. For security reasons, we recommend not enabling this feature in internally-facing communities.

In addition, you have the option of tracking your community's sharing stats by using AddThis tools (<http://www.addthis.com/>).

Note that, by default, the title of the Social Media widget is not displayed. If it is configured to be displayed, the same title appears on all Social Media widgets across the community; the title that can be specified when configuring the widget is ignored. You can specify the title in the `ps.socialmedia.title` parameter.

To enable Social Media sharing:

1. In the Admin Console, go to **System > Settings > Social Media Settings**.
2. In **General Settings > Enable Social Sharing**, select **Enable**.
3. If you want AddThis collect your community's sharing stats, set up the connection as follows:
  - a) In **Profile ID**, specify your AddThis profile ID.
  - b) In **Click Tracking**, enable or disable click tracking.
  - c) In **Toolbox HTML**, specify how you want your sharing buttons to be displayed for users in your community (vertical or horizontal) as well as which channels to feature (for example, Facebook and Twitter). For specific code examples, refer to the AddThis documentation (<http://support.addthis.com/customer/portal/articles/1337989-overview#.U0XlvceppBI>).
4. Click **Save Settings** when you're finished.
5. If you want to make the title of the widget visible, do the following:
  - a) Go to **System > Management > System Properties**.
  - b) Under **Add new property**, in **Property Name**, enter `ps.socialmedia.title`.
  - c) In **Property Value**, enter the title for Social Media widgets.
  - d) Click **Save Property**.

This enables the Social Media widget in the community.

## Configuring file uploads

As the administrator, you can configure how uploaded documents are handled using the Admin Console.

---

**Fastpath:** Admin Console: **System > Settings > Documents**

---

In addition to creating new text documents in the content editor (with Word processor-style formatting), users can upload files of other types, such as PDF files, Word documents, and spreadsheets.

---

**Note:** For space-specific document settings, see [Setting up document approver in space](#) on page 357.

---

### Enabling file upload

Uploaded documents can add up in size. If this becomes an issue, you can limit the size of uploaded files or disable file uploads altogether.

**Note:** Alternatively, you can configure the system for storing binary content in storage outside the application database. For more information, see [Configuring binary storage provider](#).

---

To enable and configure document upload:

1. In the Admin Console, go to **System > Settings > Documents** .
2. To enable document upload, under **General Settings**, in **Enable uploaded documents**, select **Enabled**.
3. In **Max uploaded document size**, specify the size limit per file in KB.  
The default is 51200 KB.
4. In **Max number of uploaded files in a batch**, specify the maximum number of files in batch.  
The default is 10 files per batch.
5. Under **General Settings**, click **Save**.

### Limiting allowed file types for file uploads

If you enable file upload, you can disallow content types that you don't want people to upload. You can also add MIME types that aren't in the current list.

To limit allowed file types:

1. In the Admin Console, go to **System > Settings > Documents** .
2. Under **Content Types**, select one of the following:
  - **Allow all content types except those listed below:** This option limits all file types specified in **Selected Content types**.
  - **Disallow all content types except those listed below:** This option allows only the file types specified in **Selected Content types**.
3. Under the **Common Content Types**, select the file type you wish to add to **Selected Content types** and click << button.

For example, to block uploading a JPEG file, you can select `image/jpeg` from **Common Content Types**. Similarly, to block Microsoft Word files:

- Select `application/msword` from **Common Content Types** to block word documents in .doc format.
- Type `application/vnd.openxmlformats-officedocument.wordprocessingml.document` to add a new content type to block word documents in .docx format.

4. Under **Content Types**, click **Save**.

## Configuring settings for attachments

If you find that users are attaching many large files to their content and the application is slower as a result, you should consider creating limits by adjusting the size and quantity settings.

---

**Fastpath:** **Admin Console: System > Settings > Attachments**

---

You can also enable and disable image previews, and specify the preview size for attached images. Note that embedded images have their own set of limits than can be configured. For more information about the differences, see [Understanding embedded, attached, and uploaded images](#) on page 102. For more information about embedded images configuration, see [Configuring settings for embedded images](#) on page 102.

---

**Note:** Image preview sizes are specified in pixels and attachment sizes are specified in KB.

---

### Limiting allowed file types for attachments

Content type settings let you specify which kinds of files (as determined by their MIME type) should be allowed as attachments. You might find that some file types aren't needed, or are in fact unwanted. If you want to prevent some kinds of files from being uploaded, you can disallow them by adding them to the Disallowed Content Type list.

If you enable file attachment, you can disallow content types that you don't want people to upload. You can also add MIME types that aren't in the current list.

To limit allowed attachment types:

1. In the Admin Console, go to **System > Settings > Attachments**.
2. Under **Content Type Settings**, select one of the following:
  - **Allow all content types except those listed below:** Select this option to allow all file types except specified in **Selected Content types**.
  - **Disallow all content types except those listed below:** Select this option to prohibit all file types except specified in **Selected Content types**.
3. Under **Content Type Settings**, click **Save**.
4. Copy the file types to the **Selected Content types**.

If required, you can add more content types by using the **Add Content Type** box. The configuration is saved automatically.

---

**Note:** Attachments that are uploaded using the **Upload Attachments** menu in Jive for Outlook are treated as Uploaded Files. You can block these files from being uploaded. For more information, see [Limiting allowed file types for file uploads](#) on page 100.

---


## Managing images

Jive users can include images in content of different types, or import images to places as separate pieces of content and gather them into collections. You can configure the options for importing and using images in places.

### Understanding embedded, attached, and uploaded images

Images attached to content or uploaded as content are handled and displayed differently than images that are inserted by using the insert image option.

#### Embedded images

You can embed images in some content types by clicking the Insert Image (  ) icon in the content editor. Embedded images show up in the content itself. You can embed up to 50 images.

An embedded image can display as a thumbnail if it's too big, based on the maximum height and width you specify in the image settings. To modify the way embedded images are handled, see [Configuring Support for Images and Attachments](#).

#### Attached images

You can attach various kinds of files, including images, to most content types. Attached files show up as links at the bottom of published content so that others may click to view the attachment. When a user attaches an image, a preview of the image shows with its link. Previewing makes it easier for people to see whether it's the image they want before clicking its attachment link. The maximum preview size is set by default to a 25-pixel square. Attached images that are larger are made smaller to fit inside this square.

By default, you can attach up to 30 items of any file type, including images, to any piece of content, with a maximum attachment size of 51200 KB.

The settings for attachments are configured by the Jive administrator. For more information on the way embedded images are handled, including image previews, see [Configuring settings for attachments](#) on page 101.

#### Upload Images

You can upload images to the community by selecting **pencil icon > Files** . When you upload an image to a place, these images appear on the Content tab.

### Configuring settings for embedded images

Jive users can insert images in content of different types, such as documents and blog posts. The Images settings control the behavior of embedded images, as opposed to images that are attached to content as links.

---

**Fastpath: Admin Console: System > Settings > Images**

---

You can use the Images settings to enable and disable image embedding in content, and to specify the maximum number and size of images as well as when and how they should be displayed as thumbnails. Unless otherwise specified, image sizes are specified in pixels. These settings do not affect images that are attached to content as links. For more information about the difference, see [Understanding embedded, attached, and uploaded images](#) on page 102.

---

**Note:** You can use the Attachments settings under **System > Settings > Attachments** to determine how previews of attached images are displayed. For more information, see [Configuring settings for attachments](#) on page 101.

---

## Content type settings

Content type settings let you specify which kinds of images (as determined by their MIME type) should be allowed to be embedded. You might find that some image file types aren't needed. If you want to prevent some kinds of images from being uploaded, you can prohibit them by adding them to the Disallowed Content Type list. For more information, see [Configuring settings for attachments](#) on page 101.

## Embedding images

There are two ways to embed an image. You can upload an image **From Your computer** or directly **From the web**.



From your Computer



From the Web

If you have an existing image from your computer, select **From Your Computer**. On the other hand, if you want to embed an image using a web link, choose **From the web** option and enter the image URL.

---

**Note:** When embedding images using a web URL, the **Disallowed Content Type** list is ignored, and it may lead to uploading images with the restricted file types.

---

## Using external file storage

Jive can integrate with a number of external storage solutions on a licensing basis to store and organize big files and then synchronize them in a Jive group or space.

By default, Jive uses an external binary storage repository or its own database to store uploaded files. But Jive has the capability to connect to different storage providers, so you can store and organize large files in your storage provider and then socialize them in a Jive place.

---

**Note:** Attachments to Jive are not stored in external storage.

---



## Supported external file storage systems

Jive currently provides the following configurations as add-ons.

<b>SharePoint</b>	For more information, see the <a href="#">Jive for SharePoint 2010 Help</a> or the <a href="#">Jive for SharePoint 2013/2016 (v5) Help</a> depending on SharePoint installation type.
<b>Box.com</b>	For more information, see <a href="#">Box.com Integration</a> in the More Integrations Guide.
<b>Google Drive</b>	For more information, see <a href="#">Google Drive Integration</a> in the More Integrations Guide.

---

**Note:** One more option for integration with Google allows users to work with Google documents directly from Jive. For more information, see the [Google Drive Files and Docs Help](#).

---

<b>Dropbox</b>	For more information, see <a href="#">Dropbox Integration</a> in the More Integrations Guide.
----------------	---

These connectors provide two-way synchronization between files uploaded to the storage provider and a place in Jive where these files are socialized. For more information, see the [More Integrations Help](#).

## Additional integrations

You can integrate with many more storage providers with minimal development. If you want to connect a different storage provider to Jive, you can write an integration and use two-legged OAuth to connect your storage provider with Jive. For more information, see [Managing add-ons](#) on page 200 and visit the Jive Developers site at <http://developers.jivesoftware.com>.

## Configuring video

Jive supports videos in your community, but you need to whitelist certain IP addresses to provide uploaded videos when your community is behind a firewall. In addition, you can customize the video providers your community uses.

Videos that were uploaded by using the pencil icon are known as video objects (or top-level videos). You can also choose a video in your community to add to content, comments, or replies.

With only the Video Module enabled, you can only embed a video from a website.

## Setting up your firewall for video

To use the video upload feature when either your community is behind a firewall, or if you restrict end user Internet access, you might want to use IP whitelisting



rules to allow network communication between your Jive community and Perceptive servers. To do this, you need to use specific rules.

- If your community is behind a firewall and you want to open it up using specific IP whitelisting, refer to [Perceptive and Jive ingress and egress firewall rules](#) on page 105.
- If you restrict user network access by using specific IP or domain whitelisting, refer to [Perceptive playback firewall rules for user network access](#) on page 106.

## Additional references

For more information, see [Video Module FAQ](#) on Worx.

### ***Perceptive and Jive ingress and egress firewall rules***

If your community is behind a firewall and you want to open it up using specific IP whitelisting, the video service needs to make inbound connections to the Jive instance for two processes.

First, after a video is uploaded, the video service encodes the asset and makes it available for streaming. When that publish process completes, the service calls into the Jive instance and passes metadata about the uploaded asset. That process is called the Publish Callback. This requires an inbound connection to

`{jiveURL}/pubcallback.jspa`.

The other process requiring the video service to communicate with your Jive instance is related to the security of video playback. When a user presses the play button on our embedded video player, the video CDN does not initiate playback until it validates the authorization. To do that, the video service calls into your Jive instance, passing info about the requested asset and a corresponding authorization token that was generated when the page containing the player was rendered. The Jive instance then tells the CDN that it can initiate playback of the video. This process is called the Auth Callback. The authentication validation requires an inbound connection to the `{jiveURL}/authcallback.jspa`.

Jive instance must be allowed access to the following ports, IP addresses, and files:

- Inbound calls to `jiveURL/pubcallback.jspa` and `jiveURL/authcallback.jspa`
- Outbound calls on ports 80 and 443 to the IP addresses listed below.

---

**Note:** This list is currently missing some entries and will be updated.

---

```
107.21.212.16
107.22.216.172
174.129.240.31
174.29.238.27
184.72.239.40
184.73.232.18
23.21.76.80
23.23.90.48
23.23.94.7
46.137.165.93
50.16.187.111
50.16.210.98
50.19.127.228
52.206.223.205
52.22.44.102
52.22.98.14
52.4.125.148
52.44.119.45
```

52.45.236.90  
52.45.54.219  
52.54.180.117  
52.6.145.21  
54.195.246.169  
54.197.254.218  
54.204.24.127  
54.217.228.206  
54.243.35.52  
75.101.144.40  
79.125.11.104  
79.125.12.197  
79.125.20.107  
79.125.24.56  
79.125.25.81  
79.125.6.182  
79.125.6.237

### ***Perceptive playback firewall rules for user network access***

If you restrict user network access by using specific IP or domain whitelisting, you must allow ports 80 and 443 and whitelist by domain or by address.

---

**Note:** This list is currently missing some entries and will be updated.

---

### **Whitelist by domain**

Allow access to the following domains:

- \*.jivesoftware.com
- \*.twistage.com
- \*.edgecastcdn.net

Additionally, customers using HTTPS for delivery or using the alternate API URI `video-svc2.jivesoftware.com` to enable playback in China must enable these domains:

- \*.alphacdn.net
- \*.betacdn.net
- \*.omegacdn.net

### **Whitelist by IP Address**

Allow access to the following IP addresses.

- Perceptive IPs:  
107.21.212.16  
107.22.216.172  
174.129.240.31  
174.29.238.27  
184.72.239.40  
184.73.232.18  
23.21.76.80  
23.23.90.48  
23.23.94.7  
46.137.165.93  
50.16.187.111  
50.16.210.98  
50.19.127.228  
52.206.223.205

52.22.44.102  
52.22.98.14  
52.4.125.148  
52.44.119.45  
52.45.236.90  
52.45.54.219  
52.54.180.117  
52.6.145.21  
54.195.246.169  
54.197.254.218  
54.204.24.127  
54.217.228.206  
54.243.35.52  
75.101.144.40  
79.125.11.104  
79.125.12.197  
79.125.20.107  
79.125.24.56  
79.125.25.81  
79.125.6.182  
79.125.6.237

- To allow access worldwide access, whitelist the following IP ranges:

5.104.64.0/21  
46.22.64.0/20  
61.49.62.128/25  
61.221.181.64/26  
68.232.32.0/20  
72.21.80.0/20  
88.194.45.128/26  
93.184.208.0/20  
101.226.203.0/24  
108.161.240.0/20  
110.232.176.0/22  
117.18.232.0/21  
117.103.183.0/24  
120.132.137.0/25  
121.156.59.224/27  
121.189.46.0/23  
152.195.0.0/16  
180.240.184.0/24  
192.16.0.0/18  
192.30.0.0/19  
192.229.128.0/17  
192.229.156.0/23  
194.255.210.64/26  
198.7.16.0/20  
203.74.4.64/26  
213.64.234.0/26  
213.65.58.0/24  
61.49.52.0/26  
120.132.137.192/26

IPs in AWS:

**US:**

23.21.76.80  
23.23.90.48  
23.23.94.7  
34.193.164.199  
34.194.69.63  
34.197.195.21  
34.197.38.169  
50.16.187.111  
50.16.210.98  
50.19.127.228  
52.206.223.205  
52.22.44.102  
52.22.98.14  
52.23.89.187  
52.44.119.45

52.45.236.90  
 52.45.54.219  
 52.54.180.117  
 52.6.145.21  
 54.197.254.218  
 54.204.24.127  
 54.243.35.52  
 75.101.144.40  
 107.21.212.16  
 107.22.216.172  
 174.129.238.27  
 174.129.240.31  
 184.72.239.40  
 184.73.232.18  
 23.22.3.153  
 3.82.85.231  
 35.169.60.220  
 54.210.231.86  
 107.20.113.129

**EU:**

46.137.165.93  
 46.51.175.207  
 54.195.246.169  
 54.217.228.206  
 54.75.240.33  
 54.75.255.96  
 79.125.11.104  
 79.125.12.197  
 79.125.19.129  
 79.125.20.107  
 79.125.24.56  
 79.125.25.81  
 79.125.6.182  
 79.125.6.237  
 34.248.243.247  
 34.242.131.27  
 63.32.187.35  
 34.248.186.115  
 63.32.87.167

- To allow narrower access to specific CDN regions, whitelist the relevant IPs as listed in [Table 10](#) on page 108

**Table 10: CDN IPs which serve the actual content for their region**

Continent	City	Code	IP blocks	IP blocks V6	Last updated
Asia	Batam	BTH	180.240.184.128/25	2405:8f00:ED-CB:0000:0000:0000:0000/48	7/7/14 17:48
Asia	Hong Kong	HHP	108.161.247.0/24; 110.232.176/24; 192.229.154.0/24	2606:2800:6010:0000:0000:0000:0000:0000/48; 2606:2800:6040:0000:0000:0000:0000:0000/48; 2606:2800:6041:0000:0000:0000:0000:0000/48	4/10/13 19:22
Asia	Jakarta	CGK	180.240.184.0/25	2405:8F00:ED-CA:0000:0000:0000:0000:0000/48	8/28/13 19:23

Conti- nent	City	Code	IP blocks	IP blocks V6	Last up- dated
Asia	Kaohsi- ung	KHH	61.221.181.64 /26;203.74.4.64 /26	2001:b032:c101:0000:0000:0000 /48	10/26/13 23:02
Asia	Osaka	KIX	117.103.183.0 /24	2606:2800:6028:0000:0000:0000 /47	5/15/13 18:08
Asia	Seoul	ICN	121.156.59.224 /27;121.189.46. /24; 121.189.47.0 /24	121.156.59.224 /27;121.189.46.0 /24;121.189.47.0 /24	10/23/14 21:06
Asia	Singa- pore	SIN	46.22.71.0 /24;117.18.236. /24	2606:2800:6000:0000:0000:0000 /47	4/10/13 19:22
Asia	Tokyo	NRT	110.232.177.0 /24;117.18.233. /24; 192.16.56.0 /24;192.16.57.0 /24;198.7.26.0 /24	2606:2800:6020:0000:0000:0000 /47;2606:2800:6023:0000:0000:0000 /48;2606:2800:602b:0000:0000:0000 /48	2/6/14 18:46
Asia	Tokyo (NRT2)	HND	192.16.4.0 /24;192.16.5.0 /24	2606:2800:6022:0000:0000:0000 /48	5/13/14 4:43
Aus- tralia	Mel- bourne	MEL	192.16.2.0 /24	2606:2800:6032:0000:0000:0000 /47	6/3/13 16:37
Aus- tralia	Sydney	SYD	110.232.179.0 /24;117.18.235. /24	2606:2800:6030:0000:0000:0000 /47	4/10/13 19:22
Europe	Amster- dam	AMS	46.22.70.0 /24;46.22.72.0 /23; 93.184.208.0 /24;93.184.209. /24; 93.184.217.0 /24	2606:2800:5040:0000:0000:0000 /47	8/27/14 1:30
Europe	Amster- dam (AMS2)	RTM	192.16.52.0 /24;192.16.53.0 /24	2606:2800:5041:0000:0000:0000 /48	8/27/14 1:30
Europe	Copen- hagen	CPH	194.255.210.64 /26	2001:2011:c002:0000:0000:0000 /48	10/1/13 19:42

Conti- nent	City	Code	IP blocks	IP blocks V6	Last up- dated
Europe	Frankfurt (FRA2)	FCN	5.104.64.0 /23;192.229.159.0 /24	2606:2800:5070:0000:0000:0000:0000:0000 /47	5/13/14 4:44
Europe	Frankfurt (FRF)	FRF	192.229.134.0 /24;192.229.135.0 /24	2606:2800:5021:0000:0000:0000:0000:0000 /48	2/11/15 20:35
Europe	Frankfurt (Peer- ing)	FRA	72.21.89.0 /24;93.184.212.0 /24; 93.184.213.0 /24	2606:2800:5020:0000:0000:0000:0000:0000 /48	12/4/14 22:25
Europe	Helsinki	HEL	88.194.45.128 /26	2001:2060:bffb:0000:0000:0000:0000:0000 /48	10/1/13 19:43
Europe	London	LHR	5.104.71.0 /24;46.22.74.0 /23; 93.184.210.0 /24	2606:2800:5010:0000:0000:0000:0000:0000 /48	4/22/14 21:19
Europe	London (LHR2)	LCY	72.21.90.0 /24;93.184.211.0 /24; 192.16.28.0 /24;192.16.29.0 /24	2606:2800:5011:0000:0000:0000:0000:0000 /48	5/13/14 4:44
Europe	Madrid	MAD	46.22.66.0 /23	2606:2800:5000:0000:0000:0000:0000:0000 /48	10/27/14 18:51
Europe	Madrid (MAD2)	TOJ	192.229.136.0 /24;192.229.137.0 /24	2606:2800:5001:0000:0000:0000:0000:0000 /48	10/8/14 0:55
Europe	Milan	MXP	192.16.14.0 /24;192.16.15.0 /24	2606:2800:5080:0000:0000:0000:0000:0000 /48	10/31/13 5:36
Europe	Paris	CDG	46.22.68.0 /24;93.184.214.0 /24	2606:2800:5030:0000:0000:0000:0000:0000 /48	2/25/14 21:19
Europe	Paris (CDG2)	ORY	5.104.66.0 /24;5.104.67.0 /24	2606:2800:5032:0000:0000:0000:0000:0000 /47	5/13/14 4:44
Europe	Stock- holm	STO	213.64.234.0 /26;213.65.58.0 /26	2001:2040:c006:0000:0000:0000:0000:0000 /48	10/1/13 19:43

Continent	City	Code	IP blocks	IP blocks V6	Last updated
Europe	Stockholm	ARN	5.104.69.0 /24; 5.104.70.0 /24	2606:2800:5060:0000:0000:0000:0000:0000 /47	4/10/13 19:22
Europe	Vienna	VIE	5.104.68.0 /24; 108.161.242.0 /23	2606:2800:5050:0000:0000:0000:0000:0000 /47	4/10/13 19:22
Europe	Warsaw	WAW	192.16.22.0 /24; 192.16.23.0 /24	2606:2800:5090:0000:0000:0000:0000:0000 /48	1/31/14 18:26
North America	Ashburn	DCA	68.232.36.0 /24; 72.21.83.0 /24; 108.161.254.0 /24	2606:2800:4200:0000:0000:0000:0000:0000 /48	3/27/14 21:54
North America	Ashburn (DCA2)	IAD	198.7.24.0 /24; 198.7.25.0 /24	2606:2800:4202:0000:0000:0000:0000:0000 /48	5/13/14 4:43
North America	Atlanta	ATL	72.21.88.0 /24; 72.21.93.0 /24; 108.161.252.0 /24	2606:2800:4220:0000:0000:0000:0000:0000 /47	6/5/14 0:09
North America	Atlanta (ATL2)	FTY	192.16.46.0 /24; 192.16.47.0 /24	2606:2800:4248:0000:0000:0000:0000:0000 /48	5/13/14 2:49
North America	Chicago	ORD	46.22.76.0 /24; 68.232.38.0 /24; 72.21.87.0 /24	2606:2800:4210:0000:0000:0000:0000:0000 /47	9/7/13 1:21
North America	Chicago (ORD2)	MDW	198.7.18.0 /24; 198.7.19.0 /24	2606:2800:4212:0000:0000:0000:0000:0000 /48	5/13/14 4:43
North America	Dallas	DFW	68.232.39.0 /24; 72.21.86.0 /24; 108.161.244.0 /24	2606:2800:4100:0000:0000:0000:0000:0000 /48	8/27/13 21:51
North America	Dallas (DFW2)	FTW	108.161.250.0 /23; 192.229.132.0 /24	2606:2800:4102:0000:0000:0000:0000:0000 /47	5/13/14 4:44
North America	Los Angeles	OXR	192.229.130.0 /24; 192.229.131.0 /24	2606:2800:4001:0000:0000:0000:0000:0000 /48	7/22/14 18:31

Conti- nent	City	Code	IP blocks	IP blocks V6	Last up- dated
North Ameri- ca	Los An- geles	BLA	192.16.10.128 /25;192.16.10.248 /27	2606:2800:4048:0000:0000:0000:0000:0000 /248	10/23/14 0:37
North Ameri- ca	Los An- geles	BUR	108.161.240.0 /24;108.161.241.0 /24;108.161.253.0 /24;192.16.60.0 /24	2606:2800:4002:0000:0000:0000:0000:0000 /408	4/10/13 19:22
North Ameri- ca	Los An- geles	LAX	46.22.69.0 /24;68.232.40.0 /24;72.21.84.0 /24;72.21.94.0 /24;93.184.218.0 /24	2606:2800:4000:0000:0000:0000:0000:0000 /48	9/7/13 1:20
North Ameri- ca	Los An- geles (LAX2)	CPM	108.161.248.0 /23;192.16.51.0 /24	2606:2800:4004:0000:0000:0000:0000:0000 /47;2606:2800:4008:0000:0000:0000:0000:0000 /127	5/13/14 4:45
North Ameri- ca	Miami	MIA	46.22.64.0 /23;198.7.23.0 /24	2606:2800:4230:0000:0000:0000:0000:0000 /47	1/29/14 23:55
North Ameri- ca	Miami (MIA2)	FLI	192.16.6.0 /24;192.16.7.0 /24;192.229.161.0 /24	2606:2800:4232:0000:0000:0000:0000:0000 /48	5/13/14 4:46
North Ameri- ca	New York (EWR)	EWR	198.7.20.0 /23	2606:2800:4242:0000:0000:0000:0000:0000 /48;2606:2800:4244:0000:0000:0000:0000:0000 /48	2/11/15 20:34
North Ameri- ca	New York (LGA)	LGA	68.232.37.0 /24;192.16.18.0 /24;192.16.19.0 /24	2606:2800:4246:0000:0000:0000:0000:0000 /48;2606:2800:424f:0000:0000:0000:0000:0000 /48	2/11/15 20:35
North Ameri- ca	Newark (BNJ)	BNJ	192.229.147.0 /24	2606:2800:424d:0000:0000:0000:0000:0000 /48	9/10/14 17:21
North Ameri- ca	Newark (CSTG)	CNJ	192.229.146.0 /24	2606:2800:424c:0000:0000:0000:0000:0000 /48	9/2/14 18:12
North Ameri- ca	Philadel- phia	PHL	192.229.156.0 /24;192.229.157.0 /24	2606:2800:4250:0000:0000:0000:0000:0000 /408	12/18/14 22:54



Continent	City	Code	IP blocks	IP blocks V6	Last updated
North America	San Jose	SJC	46.22.78.0/24; 46.22.79.0/24; 198.7.22.0/24	2606:2800:4010:0000:0000:0000:0000:0000/48	6/27/14 16:37
North America	San Jose (SJC2)	RHV	192.229.128.0/24; 192.229.129.0/24	2606:2800:4011:0000:0000:0000:0000:0000/48	6/27/14 16:38
North America	Seattle	SEA	72.21.85.0/24; 108.161.246.0/24; 198.7.28.0/24	2606:2800:4020:0000:0000:0000:0000:0000/48	8/11/14 19:12
North America	Seattle (SEA2)	PAE	192.16.54.0/24; 192.16.55.0/24	2606:2800:4021:0000:0000:0000:0000:0000/48; 2606:2800:4022:0000:0000:0000:0000:0000/48; 2606:2800:4023:0000:0000:0000:0000:0000/48; 2606:2800:4024:0000:0000:0000:0000:0000/48	8/30/14 3:32
South America	Sao Paulo	CGH	192.16.41.0/24; 192.16.42.0/24	2606:2800:420b:0000:0000:0000:0000:0000/48	5/11/14 17:22

## Configuring video provider support

In Jive Hosted and On Premise environments, you can enable and disable certain video providers and add new providers if they are supported. By default, users can embed video content hosted by YouTube, Vimeo, Veoh, and Dailymotion.

**Fastpath: Admin Console: Spaces > Settings > Filters and Macros**

When users create content and embed videos, they see the supported video provider list as part of the helper text under the embed code field. This list is modified when you enable and disable macros for each video provider in the Admin Console.

For information about enabling your users to embed videos from a non-public video archive via Kaltura and Brightcove, see [Adding Kaltura as video provider](#) on page 114 and [Adding Brightcove as video provider](#) on page 114. Using these providers provides another layer of permissions around embedded video viewing on top of your Jive space permissions.

To enable and disable video providers:

1. In the Admin Console, go to **Spaces > Settings > Filters and Macros** and navigate to the space for which you want to enable or disable videos.  
If you want to apply the setting community-wide, select the root space.
2. Browse to the Video Macro settings and set the macros you want to enable to **On**.
3. Set the macros you want to disable to **Off**.

Note that when you disable a provider macro that has been enabled previously, videos already embedded from that provider show as disabled.

### ***Adding Brightcove as video provider***

You can allow your users to embed videos hosted by Brightcove in their content by specifying the Player ID and Partner ID associated with your Brightcove repository in a custom macro.

If you use Brightcove to host videos and want to make them available for users to post in your community, you need to specify the settings for your site using a macro which you can then enable and disable.

To enable and configure Brightcove video provider:

1. Upload your videos by using the Brightcove Media Management UI and make sure they're available for viewing.
2. In the Brightcove media management UI, across from a video, copy the embed codes for the video.
3. Get the `{PLAYER_ID}` and `{PLAYER_KEY}` that identify your site.
4. In the Admin Console, go to **Spaces > Settings > Filters and Macros**.
5. Next to the **Brightcove Video Provider Macro** click **Settings**.
6. On the **Render Filter Settings**, use the values you obtained from the Brightcove Media Management UI to populate the **playerKey** and **playerID** boxes.  
Make sure you select the space where you want to enable this provider. If you want to apply the setting community-wide, select the root space.
7. Click **Save Properties**.
8. On the **Filters and Macros** page, select **On** for the **Brightcove Video Provider Macro**.

With the provider enabled, when your users embed videos from the web in content, they see Brightcove as a video provider option below the embed code field, and can paste video embed code from Brightcove into the field to successfully post and play videos.

Note that when you disable a provider macro that has been enabled previously, videos already embedded from that provider show as disabled.

### ***Adding Kaltura as video provider***

You can allow your users to embed videos hosted by Kaltura in their content by specifying the Player ID and Partner ID associated with your Kaltura repository in a custom macro.

If you use Kaltura to host videos and want to make them available for users to post in your community, you need to specify the settings for your site using a macro which you can then enable and disable.

To enable and configure Kaltura video provider:

1. Upload your videos using the Kaltura Media Console and make sure they're available for viewing.
2. Under Embedding Kaltura Media Players in Your Site, find the instructions for "Using Static HTML-based Embed Codes." For more information, see Embedding Kaltura Media Players in Your Site in the Kaltura Knowledge Center at <http://knowledge.kaltura.com/embedding-kaltura-media-players-your-site>.
3. Following the instructions, get the `{PLAYER_ID}` and `{PARTNER_ID}` that identify your site.
4. In the Admin Console, go to **Spaces > Settings > Filters and Macros**.
5. Next to the **Kaltura Video Provider Macro** click **Settings**.
6. On the **Render Filter Settings**, use the values you obtained from the Kaltura to populate the **playerKey** and **playerID** boxes.  
Make sure you select the space where you want to enable this provider. If you want to apply the setting community-wide, select the root space.
7. If required, in **playerColor**, change the player color.
8. Click **Save Properties**.
9. On the **Filters and Macros** page, select **On** for the **Kaltura Video Provider Macro**.

With the provider enabled, when your users embed videos from the web in content, they see Kaltura as a video provider option below the embed code field, and can paste video embed code from Kaltura into the field to successfully post and play videos.

Note that when you disable a provider macro that has been enabled previously, videos already embedded from that provider show as disabled.

## Configuring ratings and liking

You can configure the way ratings and liking for different types of content work to make them a prominent feature of your community.

---

**Fastpath: Admin Console: System > Settings > Ratings and Liking**

---

Ratings and likings are an excellent way for users to get feedback on content and earn status points. When a user rates or likes content, the community sees that action listed in the Recent Activity tiles. For example, the community might see *Joey Ramone rated The Rose City Quarterly Document*.

To configure ratings and liking:

1. In the Admin Console, go to **System > Settings > Ratings and Liking**.
2. Select check boxes for the content types to enable ratings and likings.

---

**Note:** You may not settings for ratings if content evolution is enabled in you community.

---

3. Specify the feature settings:

Setting	Description
Allow Comments with Ratings	Select <b>Yes</b> if you want users to have the option to add a comment after they rate content.
Show Likes in Recent Activity	Select <b>Yes</b> if you want to see a post in recent activity every time a user likes content.

4. Click **Save Changes**.

## Reindexing browse data

Browse reindexing is available for troubleshooting indexing problems with browse content.

---

**Fastpath:** Admin Console: **System > Settings > Browse**

---

If you have a specific problem with your browse content synchronization, you can reindex the browse data in your database.

To reindex the browse data:

1. In the Admin Console, go to **System > Settings > Browse**.
2. Click **Re-Synchronize Index**.

The Browse Settings page shows progress for all reindexing tasks in the cluster.

## Managing feeds

You can control the default behavior of feeds used to stay current on content changes.

Users can choose to receive feeds (RSS, JSON, or Atom). As an administrator, you can configure aspects of these feeds, such as which feed technology is used, whether basic authentication is required, and so on.

---

**Fastpath:** Admin Console: **System > Settings > Feeds**

---

For more information, see [Working with Feeds](#).

## Filtering and formatting content

You can use filters and macros to make text changes at run time. You can turn these changes on or off, or to change the settings that control how they work.

Filters and macros have different roles. Here's how they work in general:

- A *filter* operates on all of the text in content. So a filter is a good way to perform tasks, such as changing every link URL or looking for particular text throughout a piece of content.
- A *macro* is designed to operate on a particular part of the content, such as a particular section of text. For example, a macro formats a link to a blog post with the CSS style reference needed to display the blog icon.

---

**Note:** We no longer refer to these operations as "macros" in the user interface. Many of the macros now appear as selections on the content editor toolbar, for example, a button for setting text color or formatting code. Even so, the Admin Console and developer documentation continue to refer to them as macros.

---

## Configuring filters and macros

You can configure filters and macros for the entire community and override the settings for specific spaces.

The Filters and Macros page lists the filters and macros installed for the selected space. By default, each space inherits the set of filters and macros from the global configuration defined in the root space.

However, the list isn't shown for sub-spaces until you choose to copy filters to the sub-space. When you click the Copy Global Filters button on the Filters and Macros page for a subspace, the application copies the global list and configuration to the page. If you want to edit the list for a sub-space, you need to click the button first.

---

**Fastpath:** Admin Console: Spaces > Settings > Filters and Macros

---

## Pre-Processing Filters

Pre-processing filters are the very first filters to operate on your content. They are performed on the initial version of the content before all other macros and filters have done their work to generate content. For example, the HTML filter should be executed before any other macros or filters; otherwise, it would strip out the HTML content that the other macros and filters introduce.

By default, there are no editable pre-processing filters.

## Macros

A macro operates on, or adds, a specific part of content. For example, a macro could format a link or embed a window to display video.

In the list, you can see all of the macros installed on the system. Many of these, including macros whose functionality is tightly integrated into the content editor toolbar, cannot be disabled. Those you can disable or delete are generally macros installed as separate components, such as in plugins.

### Filters

Filters — you can think of them as mid-processing filters — operate on text after macros have been executed, but before post-processing filters have done their work. By default, the application doesn't include any editable filters.

### Post-processing filters

Post-processing filters provide a final sweep of content before other people see it. This is where you catch whatever is in the text, including whatever might have been added by other filters or macros.

One of the most important filters you can enable is the [Profanity filter](#) on page 118. Another useful filter is the [Emoticon filter](#) on page 120.

### Profanity filter

You can set up the Profanity filter to automatically replace inappropriate language in your community.

---

**Fastpath: Admin Console: Spaces > Settings > Filters and Macros**

---

The Profanity filter automatically detects words in your profanity list and replaces them with \*\*\*. The Profanity filter is the most commonly used filter; we recommend that you consider using it. You set up the filter by adding the words you want filtered out, and then turning the filter on. For more on filters, see [Configuring filters and macros](#) on page 117.

\*\*\*\_\*\*\*

Like • 0

Document created by Administrator on Nov 24, 2019

This a profanity filter example.

When words that are listed in the profanity filter appear in content, they are replaced with \*\*\*\* once the content is published.

ATTACHMENTS

Visibility: A new space • 2 Views

Last modified on Nov 24, 2019 4:41 PM

Tags: Add tags

Global Reach

0%

Impact 0

Sentiment Neutral 0

**Note:** The Profanity filter only works with languages that have natural word boundaries. For example, this filter does **not** work with Japanese and Chinese.

**Attention:** The Custom word list has a limit of 3500 characters.

You can set the Profanity filter for the whole community or for particular spaces.

### Best practices for creating profanity word list

If you have more than a few entries, enter the longer or broader phrases before the smaller and more specific ones because they are evaluated in the order you enter them.

For example, your list includes both `gleeking boil-brained nit` and `nit`. The entries are evaluated in the order you enter them. So if you've got `nit` before `gleeking boil-brained nit`, then content that includes `That's rubbish, you gleeking boil-brained nit` is filtered to `That's rubbish, you gleeking boil-brained ***` — you won't have filtered out the whole phrase.

## Setting up Profanity filter

To set up the Profanity filter for your community:

1. In the Admin Console, go to **Spaces > Settings > Filters and Macros** .
2. Scroll to the **Profanity** filter and click **Settings** next to it.
3. In **Custom word list** , enter the list of words you want filtered out of your content.  
Words and phrases must be separated by commas.
4. Select check boxes for the parts of the content you want filtered: **Body**, **Subject**, and **Property Values**.
5. Click **Save Properties** to save the changes.

The **Filters and Macros** page is opened with the message detailing the result at the top.

## Enabling Profanity filter

To enable the profanity filter:

1. In the Admin Console, go to **Spaces > Settings > Filters and Macros** .
2. Scroll to the **Profanity** filter and select **On** next to the filter.
3. Click **Save Settings** under the list.

## Emoticon filter

You can set up emoticon filter to automatically replace emoticons with emoji.

---

**Fastpath: Admin Console: Spaces > Settings > Filters and Macros**

---

The emoticon filter automatically detects ASCII emoticons in texts and replaces them with a relevant emoji when a text is typed or pasted into the content editor. The filter allows you to limit the replacements to certain parts of the content and to change the images for available emoji.

The filter settings apply to the selected space; its child spaces inherit the settings by default. You can override the defaults for a space (and its descendants) by setting up the filter for this space.

## Emoji images

Jive replaces emoticons with the images from the folder specified in the emoticon filter. Emoji image folder contains a separate image for every available emoji. Images must be in .png format, the recommended size is 16x16 pixels.

The default emoji set includes the following images: angry.png, blush.png, confused.png, cool.png, cry.png, devil.png, grin.png, happy.png, laugh.png, love.png, mischief.png, plain.png, sad.png, shocked.png, silly.png, wink.png, info.png, alert.png, plus.png, minus.png, check.png, x.png.



## Setting up emoticon filter

To set up emoticon filter:

1. In the Admin Console, go to **Spaces > Settings > Filters and Macros**.
2. On the **Filters and Macros** page, scroll to the emoticon filter and click **Settings**.
3. On the **Render Filter Settings - Emoticon for <place>**, change the space to which the filter applies as follows:
  - Click **change space** and select the necessary space.
4. To change parts of the content where the filter applies, select the necessary content parts.
5. To change the emoji images, specify the path to the folder with the new images. The path can be absolute or relative.
6. Click **Save Properties** to save the changes.

The **Filters and Macros** page is opened with the message detailing the result at the top.

7. If necessary, click **On** next to the filter name to enable the filter.

## Managing interceptors

Interceptors perform actions on incoming requests that seek to post content.

### Interceptors overview

You can configure interceptors on the Interceptors page of the Admin Console.

Some of the interceptors have functionality related to features exposed for configuration elsewhere in the Admin Console. For example, the Ban User interceptor is designed to prevent the specified users from posting content. In contrast, the ban settings you can make elsewhere (see [Banning People](#) for more information) are intended to ban users from logging in at all.

Similar to filters, interceptors can be applied to discussions, document comments, and blog comments. You can't apply interceptors to the body text of documents, and to a blog post only when it's first created. Note that people authoring documents and blog posts can create content that's less filtered.

---

**Note:** When you don't want any part of a post or comment with an offending word to enter the space before an action is taken, use an interceptor instead of a filter. For more about filters, see [Filtering and Formatting Content](#).

---

### Installing interceptors

Interceptors are included, but not installed or activated by default. You can enable interceptors when they are required.

---

**Fastpath:** **Admin Console: Spaces > Settings > Interceptors**

---

Some things to keep in mind when you are setting up interceptors:

- Interceptors are executed in the order they appear in the list of interceptors. So, if you install more than one, use the move arrows to make sure the interceptors are listed in an order that makes sense. For example, do not add a message to a moderation queue by a person whose IP is banned from posting.
- You can install an interceptor multiple times, setting it up differently each time.
- For the query strings, use the search conventions, as described in [Search Reference](#) in the User Guide. Note that you cannot enter a comma-separated list of words in the search query string boxes.

To set up an interceptor:

1. In the Admin Console, go to **Spaces > Settings > Interceptors**.
2. Verify that you have selected the correct space to enable interceptors. If you need to change the space, click **change space** at the top of the page.
3. From the interceptor list, select the type of interceptor that you want to install.
4. Click **Install**.

After you've installed the interceptor, it appears in a list of current interceptors.

5. In the list of interceptors, click **Edit** next to the interceptor to edit its properties.
6. Use the list of interceptor properties to refine how the interceptor must work. For more information, see [Interceptor reference](#) on page 122.
7. For the search queries, make sure to use the search conventions, as described in [Search Reference](#) in the User Guide. Note that you cannot enter a comma-separated list of words in the search query string boxes.

## Interceptor reference

Here's a list of the interceptors available in a Jive community.

### Ban User

This interceptor lets you ban users from posting.

- In the Ban List box, you enter a comma-separated list of user names for people you want to ban from posting.
- You can also select to have emails sent to these users when they try to post. You can edit the User Interceptor message template for the email. For more information on email templates, see [Editing email notification templates](#) on page 180.

### IP Address

This interceptor provides ways to moderate on content coming in from certain people (or to ban them) based on their IP addresses.

- In the Banned IP List, you enter a comma-separated list of the IP addresses you want to ban from posting.
- You can use the Email Notification boxes to send email to people you specify (such as administrators in your community) when posts come from certain IP

addresses. For more information on email templates, see [Editing email notification templates](#) on page 180.

- In the Moderation IP List, you can enter the addresses of content sources whose posts should automatically be added to the moderation queue. For more about moderation, see [Moderation](#) on page 416.

## Gateway Privacy Manager

This interceptor gives you slightly finer control over how gateway-imported messages are handled. You can hide the name or email address of the poster in the incoming message. If you do, you can store the hidden values in extended properties so you can take a look at them later. For more information on extended properties, see [Fine-tuning with extended properties](#) on page 365.

## Moderation Controller

Use this interceptor for finer control over which users' content is moderated. The interceptor uses the user and group lists that are viewable on the People pages of the Admin Console (for more information, see [Managing User and Groups](#).) Enter comma-separated lists of user names or groups to specify who should always or never be moderated.

## Message Governor

Use this interceptor to control how quickly a single user can post messages. For example, you might want to limit frequency if you're having trouble with auto-posting of spam messages. The message template is provided for you in the interceptor properties.

## Keyword

Use a keyword interceptor to search strings for keywords in incoming posts.

---

**Caution:** Make sure that you are enabling this feature in the correct place. If you need to change the space, click **change space** at the top of the page.

---

You can choose to have incoming posts:

**Reviewed by a moderator**

Enter your keyword or keywords in the Moderation Query String box by using the search conventions, as described in [Search Reference](#) in the User Guide. Whenever this word or words are found in a post, the post is sent to the moderator for approval (or rejection) before it is published in the community. For more information about moderation inheritance, see [Moderation inheritance in groups and spaces](#) on page 422.

**Blocked from being published**

Enter your keyword or keywords in the Blocked Content Query String box using the search conventions, as described in [Search Reference](#) in the User Guide. Whenever this word or words are found in a post, the post is blocked and not published in the community. In the Blocked Content Error Message box, you can create a message for the user to see when a post is blocked, for example, "We're sorry, but this post contains potentially inappropriate content and has been blocked from being posted in the community."

**Alerted via email to specific users after the posts are published**

You can enter your keyword or keywords in the Email Query String box using the search conventions, as described in [Search Reference](#) in the User Guide. In the Email Notification List box, add the email addresses of the users you want to be notified via email whenever this query returns something. The notification Email contains the keywords that match the query.

## Managing Document Conversion

As the application converts PDFs and Office documents for preview, you can manage the conversions and troubleshoot them when necessary.

For example, you can delete failed conversion attempts, prompting the application to reconvert the document. You manage conversion in the Admin Console.

---

**Fastpath: Admin Console: System > Management > Document Conversion Status**

---

In the Admin Console, on the **Document Conversion Status** page, you can view the status of conversions. For each conversion in the list, you can find the information as described in [Table 11](#) on page 125.

You can filter the list of items by using the **Filter by Filename** box at the top of the page. For filtering, you can use either the full document ID number or a partial document file name.

**Table 11: Document Conversion Status reference**

Item	Description
File Name	The file name of the document. If you have rights to the document, you can click the file name to see the document in the community or to re-run the conversion, or click <b>View</b> to see only the converted document if available. You won't have access to private documents or documents in secret groups.
Size	The file size in bytes.
PDF Status	An indicator that shows whether PDF conversion succeeded.
Pages	The number of pages in the document. This is blank for failed conversion attempts.
Preview Status	An indicator that shows whether a preview was successfully created.
Thumbnail Status	An indicator that shows whether a thumbnail view was successfully created.
Time	An indicator that shows when the conversion attempt completed.
Error	An indicator that shows any errors that occurred during the conversion attempt.

## eDiscovery search

You can search community content for specific users and export content as XML if it's needed for legal reasons or internal investigations. This is an optional, add-on feature. Contact your Jive representative for more information.

---

**Fastpath: Admin Console: System > Management > eDiscovery Search**

---

You may need to extract content records for specific users during a period, for example, if you need this information for Sarbanes-Oxley compliance. In this case, you can use the eDiscovery Search feature to export current records of content a user interacted with during the selected dates. This information includes content the user has created, edited, replied to, or commented on within a specific date range. You can optionally search for interactions containing a key word or phrase. The content, along with any replies and comments associated with the content, is extracted in the form of XML documents, which contain the text component of the interactions, and binary files containing images or attachments. This information is delivered in a zip file.

Content returned by eDiscovery Search includes documents, discussions, questions, blog posts, videos, polls, ideas, project tasks, status updates, and direct messages. It does not include any content the user has shared or bookmarked. This tool has access to all data in the instance and is not restricted by content permissions while searching, so private user data may be exposed in the archive.

By default, search results are available for download for 7 days. You can reset this period by setting the `ediscovery.expirationPeriod` system property to a different number of days.

eDiscovery Search does not have access to any information that has been deleted from the community. It extracts only content, replies, and comments that exist in the community at the time of the search, including private and secret content. In the same way, a document is extracted in the version existing at the time of the search. If a user deletes a comment or modifies a document while the search is running, and the comment or document has not been retrieved by the search yet, the deleted or changed information is not extracted. Earlier versions of content are not returned by the search, even if they contain the search term.

To retrieve content through eDiscovery Search:

1. In the Admin Console, go to **System > Management > eDiscovery Search**.
2. Under **New Search**, in the **User** box, start typing a user's name or click **Select People** to choose from the list.

You can only search one user at a time.

3. In **Search Criteria**, type a single word or a phrase to search for.

A phrase is searched as entered. For example, searching `stock options` returns only content references where those words occur together in that order.

4. Under **Date Range**, select a start date and an end date.

The search always begins at midnight on the start date and ends at 11:59:59 on the end date. You can't schedule a search for a day that is later than the current day. You cannot extract more than one year of data at a time. If you need to extract more than a year of data, you need to run multiple searches spanning one year or less.

Wait for your search to complete: this may take a long time depending on how much data you are searching. You can only run one search at a time.

## Configuring people-related settings

People-related settings pertain to the features related to users, such as user relationships, user access, and password resets. In this section, you can find information for configuring these features.

### Managing access

*Access to Jive features is managed through the Admin Console. A few of these features are available to system administrators only. But as a community administrator, you can configure most of the people-related settings. Additionally, system and space administrators can grant permissions for most of the user and administrator tasks.*

## Configuring password settings

Setting up password policies, such as determining the minimum strength of each password and defining password expiration, is one of the ways to make your Jive community more secure.

### ***Password update settings***

You can give people the ability to change or securely reset their passwords and define the strength of each password.

---

**Fastpath:** Admin Console: People > Settings > Password Reset

---

---

**Fastpath:** Admin Console: System > Settings > Password Control

---

For the detailed procedure of configuring password update settings for users, see [Configuring password update settings](#) on page 128.

---

**Note:** The settings discussed in this section do not affect users who use federated or SSO login.

---

## Self-service password resets

When password reset is enabled, users can change their passwords with the help of password strength tips and a strength meter. They can access the functionality or the option under the avatar in the user interface:

- By using the link on the Login page: The user provides the required information about themselves and receives an email with instructions on password change.
- By selecting **Change Password** under their avatar on the user interface.

This feature does not affect the ability of community administrators to update passwords for users. For more information, see [Manual password reset](#) on page 132.

## Password strength

You can require each user password to meet certain criteria to make passwords more secure. You can use one of the existing policies or define a custom policy.

Password strength policy sets the following requirements for each password:

- The minimum and maximum passwords length.
- The number of Latin uppercase [A-Z] and lowercase [a-z] letters.
- The number of digits [0-9].
- The number of special symbols, such as @, %, or \*.

## Password reuse

This setting allows specifying the reuse policy by defining the number of unique passwords before a user can reuse an old password. Note that this policy affects only self-service password resets and does not apply to password updates performed by community administrators.



**Configuring password update settings**

Configuring password update settings include enabling self-service password updates and setting up strength requirements for newly created passwords.

---

**Fastpath:** **People > Settings > Registration Settings**

---



---

**Fastpath:** **Admin Console: People > Settings > Password Reset**

---



---

**Fastpath:** **Admin Console: System > Settings > Password Control**

---

For more information about the available password update settings, see [Password update settings](#) on page 127.

To enable and configure password reset:

1. In the Admin Console, go to **People > Settings > Registration Settings**.
2. Under **Security**, in the **Password Strength Check** section, specify how strong each user password must be.

You can select one of the predefined options or select **Use custom password parameters** and set the following requirements:

Parameter	Description	Default
<b>Max length</b>	The maximum length of a password.	128
<b>Min length</b>	The minimum length of a password.	12
<b>Uppercase</b>	The minimum number of Latin uppercase letters [A-Z] in a password.	1
<b>Lowercase</b>	The minimum number of Latin lowercase letters [a-z] in a password.	1
<b>Numerals</b>	The minimum number of digits 0-9 in a password.	1
<b>Special characters</b>	The minimum number of special characters (for example, !, @, or %) in a password.	1
<b>Characters that must be changed from old password</b>	The minimum number of symbols that must be changed from an old password when updating a password.	1

3. In the **Human Input Validation** section, select **Enabled** to present a captcha to users.
4. Click **Save Settings**.
5. Go to **People > Settings > Password Reset**.
6. Under **Password Resetting Status**, select **Enabled**.  
This enables user to change their passwords themselves.
7. Click **Save Settings**.
8. Go to **System > Settings > Password Control**.
9. Under **Password Reuse**, select **Enabled**.
10. In **Max history**, specify the number of passwords after which the passwords may be reused.

Additionally, you can configure the template of the email confirming the password reset. For more information about setting up email templates, see [Setting up email](#) on page 170.

### ***Password expiration***

By default, passwords to Jive communities do not expire. Enabling and configuring password the password expiration feature you can enforce password updates for your community.

You can define the minimum and maximum lifetime for each password and when the notifications about password expiration should be sent to users.

---

**Note:** This feature does not affect users who use federated or SSO login.

---

For detailed procedures for password expiration configuration, see [Configuring password expiration](#) on page 131.

### **Password expiration settings**

For the password expiration feature, you can determine the following settings:

- Enable or disable the feature.
- Set the number of days after a password must be changed. By default, the maximum password lifetime is 60 days.
- Set the number of days after a successful password update during which the password cannot be changed again. By default, the minimum password lifetime is 1 day.
- Set the number of days before the expiration date when notifications are sent. By default, the first notification is sent a week before the password expiration.

For the corresponding system properties, see [System properties reference](#) on page 241.

## Notifications about password expiration

The notifications emails sent to users are based on the message templates.

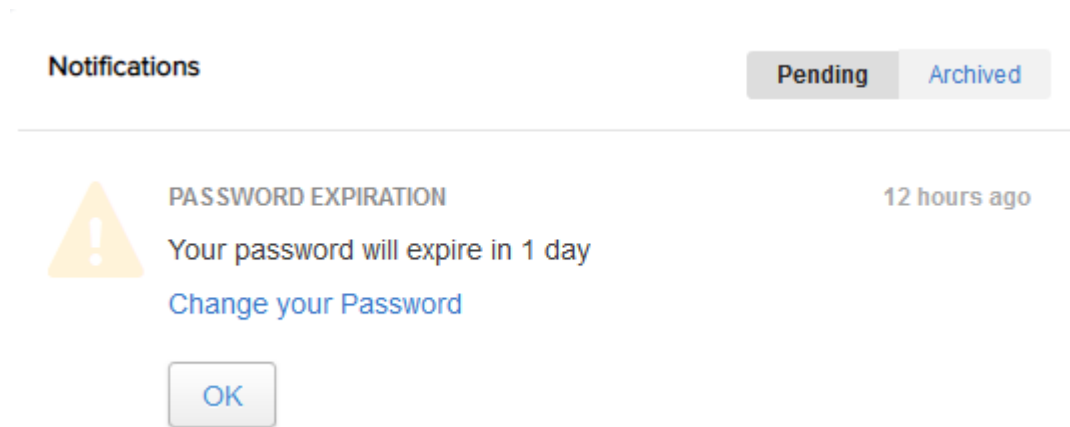
- The **Password Expiration** template is used to apprise users about the coming password expiration.
- The **Password Expired** template is used to apprise users about already expired passwords.
- The **Password Reset** templates are used when changing the passwords.

For more information about templates and their configuration, see [Editing email notification templates](#) on page 180.

## Password expiration for a user

Notifications about password expiration are sent to the user Inbox and on the email depending on the user preferences setup. Notifications are sent every day after the configured date until the password is updated or expires. Each notification contains instructions for updating the password.

**Figure 3: Password expiration notification in Inbox**



After the password expires, the user will not be able to log in without updating the password, regardless of the **Keep me signed in** option. An appropriate message is displayed on the login page:

**Figure 4: Login page after user password expired**

! Your password has expired. Click "I forgot my password" to update your password.

**Sign in** **Don't have an account?**

Email Address [Click here to create one.](#)

Password

☐ Keep me signed in

**Sign in**

[I forgot my password](#)

[I forgot my username](#)

Additionally, a notification about an expired password is sent to the user email.

And if a user tries to update a password within the period when the password cannot be changed, they will get the following message:

! You have to wait 1 day before changing your password again.

## Logging password expiration

Password expirations are not explicitly logged. But a password expiration revokes all user sessions and such events are logged, for example:

```
2019-01-02 11:08:37,956/PST - [INFO] - ALL SESSIONS REVOKED for User:
'user@test.com' - [SYSTEM] -
```

## Configuring password expiration

Password expiration configuration includes setting up the required system properties and configuring the message templates for email notifications.

---

**Fastpath: Admin Console: System > Settings > Password Control**

---

---

**Fastpath: Admin Console: System > Setting > Message Templates**

---

For more information about the password expiration feature, see [Password expiration](#) on page 129.

### To enable and configure password expiration

1. In the Admin Console, go to **System > Settings > Password Control**.
2. To enable password expiration, under **Password Expiration**, select **Enabled**.
3. In **Expiration days**, specify the number of days after which passwords must be changed.

Possible values are zero and natural numbers.

4. In **Min life days**, specify the number of days during which the password update is prohibited.

Possible values are zero and natural numbers.

5. In **Expiring notification days**, specify the number of days before the password expiration date when the first notification must be sent.

Possible values are zero and natural numbers. The notifications are sent until the password is updated or expires.

6. Click **Save**.

With these settings configured, the password expiration policy is enforced for your community.

### To configure email templates

To configure email templates for the notifications:

1. In the Admin Console, go to **System > Setting > Message Templates**.
2. Configure the **Password Expiration**, **Password Expired**, and **Password Reset** templates as required.

For more information about templates and their configuration, see [Editing email notification templates](#) on page 180.

### **Manual password reset**

Jive offers two options for admins to reset user passwords when users can't do that themselves. Administrators can set a temporary password (and relay the password to the affected user) or reset the password (for the user to change it on the next login).

---

**Fastpath: Admin Console: System > Settings > Password Control**

---

Note that you can select only one of these options for your community.

Configuration of the manual password reset affects only the administrator's capabilities for updating user passwords, it does not affect the ability of the users to reset the passwords themselves. For more information on configuring the password options for users including self-service password resetting, see [Configuring password update settings](#) on page 128.

---

**Note:** This feature does not affect the ability of the users to reset the passwords themselves. For more information on configuring the password options for users, see [Configuring password update settings](#) on page 128.

---

---

**Note:** This feature does not affect users who use federated or SSO login.

---

For the detailed procedure of configuring manual password reset, see [Configuring manual password reset](#) on page 137.

### **When password reset is disabled**

By default, a community administrator can directly set (for new user accounts) or change passwords (for existing user accounts). In this case, users rely on administrators to correctly pass the password and not abuse the privilege.

The update is done as follows:

1. The administrator finds and opens the **User Summary** page in the Admin Console, then clicks **Change Password**.
2. This opens the **Change User Password** page where the administrator enters a new password for the user.
3. After the change, the administrator informs the user about the password update and relays the new password.

**Figure 5: User properties page with password update option enabled**

The screenshot shows the 'User Summary' page for user 'li.lils4422@gmail.com'. The 'People' tab is active. The left sidebar has 'Management' and 'Settings' sections. The main content area has a 'User Summary' header. Below it, a message states: 'Your system is configured to use a user's email address as their user name, so if you change the user name, the user name will be changed to match.' Below this message are links: 'Change Password', 'View Documents', 'View Discussion Messages', 'View Blog Posts', 'User Sessions', 'Delete User and Content', and 'Test Digest Email'. A table titled 'User Properties' shows the following details:

User Properties	
User ID:	2003
Username:	li.lils4422@gmail.com
Password:	<a href="#">Change Password</a>
Activated: ?	Yes <a href="#">[Deactivate]</a>
Federated: ?	No <a href="#">[Federate]</a>

**Figure 6: Changing password page**

**User Password:** [li.lils4422@gmail.com](#)

The 'Change User Password' form contains the following elements:

- Change User Password** (Section Header)
- New Password:**
- Confirm Password:**
- Change Password** (Button)
- Cancel** (Button)

Similarly, when creating a new user account, the administrator directly enters the password and relays it to the user later.

## When password reset is enabled

With the *password reset* feature enabled, the administrators can only reset passwords for existing user accounts, thus forcing the users to change the password on the next login. This option provides a more secure way of setting up and updating user passwords.

When a new account is created, the new user is sent an email with the account details: they should click the **Forgot Password** link and follow the instructions to create a new password for themselves. The email also includes a secure token which is used instead of the password.

The reset is done as follows:

1. The administrator finds and opens the **User Summary** page in the Admin Console, then clicks **Reset Password** and confirms the reset. The user password expires immediately.
2. An email about the password reset is sent to the user. If the user tries to log in before changing the password, they get a message about the password reset.



The instructions for updating the password are provided within the communication, including the token.

**Figure 7: User properties page with password reset option enabled**

The screenshot shows the 'User Properties' page for the user **li.lils4422@gmail.com**. The page has a top navigation bar with tabs: Overview, System, Spaces, Blogs, **People**, Permissions, Mobile, Add-ons, and Video. Below this is a sub-navigation bar with 'Management' and 'Settings'. On the left, a sidebar menu lists: User Search, Create User, User Group Summary, Create User Group, User Relationships, and Org Chart. The main content area has a title 'User Summary: li.lils4422@gmail.com' and a message: 'Your system is configured to use a user's email address as their user name, so if you change the user name, the address the user name will be changed to match.' Below this are links: View Documents, View Discussion Messages, View Blog Posts, User Properties (selected), Delete User and Content, and Test Digest Email. A table titled 'User Properties' contains the following data:

User Properties	
User ID:	2003
Username:	li.lils4422@gmail.com
Password:	<a href="#">Reset Password</a>
Activated: ?	Yes <a href="#">[Deactivate]</a>
Federated: ?	No <a href="#">[Federate]</a>
External Identities:	No external identities.

**Figure 8: User login page after a password reset**

! Your password was reset. Click "[I forgot my password](#)" to update your password.

## Sign in

**Email Address**

A. Bhattaraj@gmail.com

**Password**

●●●●●●●●●●●●●●

☐ Keep me signed in

**Sign in**

[I forgot my password](#)

[I forgot my username](#)

## Don't have an account?

[Click here to create one.](#)

### Logging password updates and resets

Password updates or resets are not explicitly logged. But each password reset revokes all user sessions and such events are logged, for example:

```
2019-01-02 11:08:37,956/PST - [INFO] - ALL SESSIONS REVOKED for User:
'user@test.com' - [SYSTEM] -
```

### Configuring manual password reset

Manual passwords resets by community administrators can be either enabled or disabled in your community.

---

**Fastpath:** Admin Console: System > Settings > Password Control

---

For more information about the manual password reset feature, see [Manual password reset](#) on page 132.

---

**Note:** This feature does not affect the ability of the users to reset the passwords themselves. For more information on configuring the password options for users, see [Configuring password update settings](#) on page 128.

---

To enable or disable manual password resets by community administrators:

1. Go to **System > Settings > Password Control** .
2. Under **Password Reset**, select **Enabled** or **Disabled** to turn the feature on or off.
3. Click **Save**.

With the feature enabled, community administrators will be able to reset passwords for users but not update them. For more information, see [Manual password reset](#) on page 132.

## Configuring self-service user registration

You can set the application so that new users can create their own accounts and invite others to join the community.

---

**Fastpath:** **Admin Console: People > Settings > Registration Settings**

---

If you allow user self-registration in the community, you can control who can register and who are prohibited from registering. For more information about the settings, see [User registration settings reference](#) on page 138.

---

**Restriction:** People using the community must set their browsers to enable cookies. The application doesn't encode session IDs in URLs.

---

Also, you can configure the application to display a Terms and Conditions page when new users register. For more information, see [Configuring Terms and Conditions agreement](#) on page 140.

To enable and configure user self-registration:

1. In the Admin Console, go to **People > Settings > Registration Settings** .
2. Under **User-Created Accounts**, select the **Allow users to create their own account**, and then specify the additional parameters.
3. Under **New Account Settings**, in the **Welcome Email**, select **Enabled** to send Welcome emails to newly registered users.
4. In the **Username Blacklist**, select **Enabled** to prohibit the use of specific words in user names, and then enter the words in the text box.

For example, you can add the words "admin" and "administrator" to prevent deceit.

5. In the **Fields displayed at registration** section, specify the list of required and optional fields for users to fill in when they are registering.
6. Click **Save Settings**.

With these settings enabled and configured, the allowed users can create accounts for themselves.

### *User registration settings reference*

Here you can find the settings available for user self-registration.

---

**Fastpath:** **Admin Console: People > Settings > Registration Settings**

---

Table 12: User-Created Accounts

Setting	Description
<b>Allow users to create their own account</b>	With this check box selected, user-created accounts are enabled, and registered users can invite others to join via email. For more information, see <a href="#">Inviting people to community</a> on page 30.  People can sign up for a new account from the community login page. The registration process then takes them through a brief set of screens through which they add information about themselves.
<b>Require email address validation for users creating their own account</b>	With this check box selected, self-registering users must validate their email. You can change the email template as described in <a href="#">Editing email notification templates</a> on page 180.
<b>Enforce Community Domain list</b>	With this check box selected, a person must have an email account belonging to the Community Domain List which is configured in its own section.
<b>Allow new external contributors to create their own account when invited by email to an externally accessible group</b>	With this check box selected, external contributors can create their own accounts. Alternatively, community administrators create accounts for external users themselves. For more information, see <a href="#">Managing external groups</a> on page 369.

Table 13: Registration Security

Setting	Description
<b>Registration Moderation</b>	With this enabled, new requests appear on the moderator page in the community ( <b>Moderation &gt; Pending Items</b> .) If you have a user administrator, that person must approve or decline requests; otherwise, the system administrator gets those requests. For more information, see <a href="#">Setting up user registration moderation</a> on page 428.

### New user account

Use the following table to configure user account settings.

Setting	Description
<b>Welcome Email Settings</b>	With this feature enabled, the application sends the new user an email when they've finished registering. You can edit the contents of the template used for the email.
<b>Password Strength Check</b>	This setting defines how strong user passwords must be. The password strength indicator then helps the person registering to create a password that's strong enough to qualify.

Setting	Description
<b>Human Input Validation</b>	With this enabled, a person registering is prompted with a captcha image. The image displays text (distorted to prevent spam registration) that the person must enter correctly to continue with registration. This is a way to discourage registration by other computers only for access to the community for sending spam messages.  Human input validation generally isn't needed for internal communities that aren't accessible to the public.
<b>Fields displayed at registration</b>	The fields that are displayed to prompt a user for information while they're registering. The list of fields here is based on the fields defined for user profiles. For more information on profile fields, see <a href="#">Configuring user profile templates</a> on page 413.

## Configuring Terms and Conditions agreement

If you need to have your users to agree with usage Terms and Conditions before they access your community, you can configure the system to display such agreement to users.

---

**Fastpath: Admin Console: People > Settings > Terms and Conditions**

---

If you have SSO enabled, users are prompted to accept the terms and conditions only when they log into the community for the first time. Without SSO enabled, users are prompted to accept the terms and conditions when they register for access to the community.

As a source of the agreement text, Jive can use either the text you enter in the text editor on the settings page or a particular external URL.

---

**Note:** Due to Microsoft security issues in the Internet Explorer browser, the Terms and Conditions are not displayed correctly if they are not stored on the same server as the Jive app when the Jive app is set up to use HTTPS. Therefore, we strongly recommend that you store the Terms and Conditions agreement within the Jive app or on the same server as the Jive app. If this is not possible, you could prevent this error by adding the Terms and Conditions URL to the list of IE's trusted sites or set IE to allow iframes to load remote sites.

---

To enable and configure displaying the Terms and Conditions agreement:

1. In the Admin Console, go to **People > Settings > Terms and Conditions**.
2. Specify the source of the agreement text. Do one of the following:
  - To use the internal text editor, select **Internal, from the editor below** next to **Terms & Conditions source to be used**, and then enter the agreement text in the editor box below.

Note that you can format the text.

- To use an external source, select **External, from the URL below** next to **Terms & Conditions source to be used**, and then enter the URL in the **External Terms & Conditions URL** box.

3. Click **Save Settings** when you're finished configuring on this page.

The Terms and Conditions agreement is displayed to users under the conditions you specified.

#### ***Terms and Conditions settings reference***

Here you can find the settings available for the Terms and Conditions page of your community.

In the Admin Console, you can indicate what the Terms and Conditions page should include.

---

**Fastpath: Admin Console: People > Settings > Terms and Conditions**

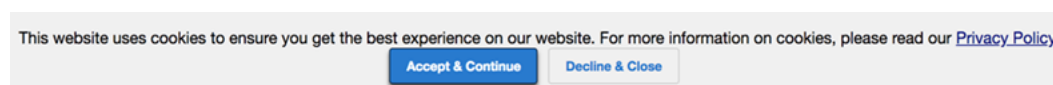
---

Setting	Description
<b>Enable/Disable Terms &amp; Conditions</b>	With this enabled, the registration user interface displays the Terms and Conditions page you specify either by writing your own agreement or linking an external page by the URL.
<b>Force existing users to re-accept modifications</b>	With this enabled, users who've already accepted the Terms and Conditions agreement must do so again. You might want to do this, for example, if you update your terms and conditions and want people to accept the new ones.
<b>Terms &amp; Conditions source to be used</b>	Indicates whether you want the terms and conditions page to consist of the text you provide in the editor on this page, or to be displayed from a URL that you provide.
Text editor	The text editor that contains the text of the Term & Conditions page if you specify <b>Internal, from the editor below</b> in the <b>Terms &amp; Conditions source to be used</b> box.
<b>External Terms &amp; Conditions URL</b>	The URL of the external Term & Conditions Settings page that is displayed to the users if you specify <b>External, from the URL below</b> in the <b>Terms &amp; Conditions source to be used</b> box.

## **Configuring Cookie Consent banner**

You can enable the Cookie Consent banner in your Jive community to ensure that users must first acknowledge the usage of the cookies before gaining access to it.

Here is how the Cookie Consent banner looks like:




---

**Fastpath: Admin Console: People > Settings > Cookie Consent Banner**

---

By default, the banner is disabled. However, you can enable it if required. For more information on cookies usage, see [Cookies in Jive communities](#) on page 256.

To enable and configure cookie banner settings:

1. In the Admin Console, go to **People > Settings > Cookie Consent Banner**.
2. To enable the Cookie Consent banner, select **Enabled**.
3. If required, in the **Privacy Policy URL**, specify the privacy policy page of your community.
4. Click **Save**.

With these settings enabled and configured, users see the cookie banner until they accept or decline cookie usage. If they decline, they are redirected to a blank page.

#### ***Cookie Consent banner reference***

Here you can find the settings available for the Cookie Consent banner of your community.

---

**Fastpath: Admin Console: People > Settings > Cookie Consent Banner**

---

Setting	Description
<b>Enabled</b>	With this setting enabled, Jive displays the cookie consent banner on all community pages. To continue using Jive, users would have to acknowledge it, and then click <b>Accept &amp; Continue</b> . If they click <b>Decline and Close</b> , the current Jive session ends, and they are redirected to a blank page.  With this setting disabled, the users would not know that your Jive community uses cookies.
<b>Privacy Policy URL</b>	A link to your Privacy Policy page to display in the banner.

### **Configuring login settings**

When configuring login settings, you can select the login type and set up login security options, such as throttling and login captcha.

---

**Fastpath: Admin Console: People > Settings > Login Settings**

---

Jive supports form-based and mixed mode user authentication, as well as throttling and captcha to make logging in a comfortable and secure procedure for any user of the community.

This topic is about configuring login security in particular. You configure registration security on the Registration Settings page, as described in [Configuring self-service user registration](#) on page 138.

#### **Form-based login**

Form-based login is necessary if you plan to implement mixed-mode authentication. For more information, see [Mixed-mode authentication](#) on page 73.



## Login security

You can set up the application to discourage automated (computer-driven) registration and login. Automated registration is usually an attempt to gain access to an application to do malicious (or at least annoying) things. By taking steps to make registering and logging in something that only a human being can do, you help to prevent automated attacks.

### Login Throttling

Throttling slows down the login process when the user has entered incorrect credentials more than the specified number of times. For example, imagine that you set the number of failed attempts to 5 and a forced delay to 10 seconds. If users are unable to log in after more than five tries, the application forces them to wait for 10 seconds until they could try again on each subsequent attempt.

### Login captcha

Login captcha displays a captcha image on the login page. The image displays text (distorted to prevent spam registration) that the person must enter to continue with registration. This is a way to discourage registration by other computers only for access to the community to send spam messages.

The login captcha setting is designed to display the captcha image when throttling begins. In other words, after the number of failed attempts specified for throttling, the captcha image is displayed, and throttling begins. You can't enable the login captcha unless login throttling is enabled.

The captcha size is the number of characters that appear in the captcha image, and which the user must type when logging in. A good value for this 6, which is long enough to make the image useful and short enough to keep it from being too annoying.

## Configuring login settings

To configure login settings:

1. In the Admin Console, go to **People > Settings > Login Settings** .
2. If necessary, disable the **Enable Form-based Login**.
3. Next to **Login Throttling**, select **Enabled** to turn on throttling, and then specify the throttling section parameters.
4. Next to **Login Captcha**, select **Enabled** to turn on captcha, and then specify the amount of the numbers in one capture.
5. Click **Save Settings**.



## Two-factor authentication

Two-factor authentication (2FA) provides an extra layer of protection for your community by requesting additional user authentication.

### **Two-factor authentication overview**

Here you can find how two-factor authentication works in Jive communities.

*Two-factor authentication* (2FA) adds a second step to the user authentication procedure used to make sure that the person trying to gain access to the community is the actual user.

### **About 2FA in Jive**

Jive uses the Time-based One-time Password Algorithm (TOTP) algorithm ([RFC 4226](#)) when providing 2FA for your community. This algorithm is supported by most authentication providers, such as Google Authenticator and Authy.

2FA affects nearly all user types, including internal users (who use the employee login), federated users, and external contributors. The only exception is the users using SSO login — their identity security is ensured by the SSO provider.

### **2FA configuration**

The two-factor authentication configuration includes the settings for TOTP 2FA as well as the Jive-specific parameters.

The TOTP 2FA configuration includes the time step, grace window, the code length, the device token lifetime, and the issuer name.

Specifically for your community, 2FA can target only a particular user group by group ID or the entire community. Additionally, enabling 2FA disables the basic authentication by default; for more information, see [2FA and API access](#) on page 145.

User ability to switch devices used for 2FA is also determined by the setup. Administrators can unpair user devices from the User Summary page in the Admin Console, without entering the 2FA verification code. Users themselves are able to unpair their devices only if it is allowed for the community. Besides, self-served unpairing requires users to authenticate with the password and verification code.

### **2FA for users**

To set up 2FA for their user account, users need to install an authentication app on their mobile device. Jive supports Google Authenticator and Authy but any other authenticator with the TOTP support should also work.

Users are required to set up 2FA on their accounts on the next login after 2FA is enabled. They also pass 2FA for the first time as the second step during setup. Note that Jive uses the primary user email for authentication and users are not required to enter their email.

Re-authenticating is required when users change their password or if they want to change the device they use for authentication.

Generally, a user can switch devices by removing the device on the Preferences page, and then authenticating themselves on the next login. Unpairing the employed device requires entering the user password and the 2FA verification code. If a user cannot unpair the devices themselves, an administrator can do it for them.

## 2FA and API access

When 2FA is enabled, the basic authentication is disabled by default. In this case, the API requests must use the OAuth authentication. An incorrectly authenticated request returns `HTTP 401 Unauthorized` response.

Although not recommended with the 2FA enabled, the basic authentication can be enabled for the community thus allowing API requests authenticated with a user name and password only.

For more information about API requests authentication, see [the Jive API](#).

## 2FA logging

Jive logs the successful and failed login events as required by system configuration for authentication logging. For more information, see [Using application logs](#) on page 434.

### *Setting up two-factor authentication*

Here you can the detailed setup of 2FA for your community.

---

**Fastpath: Admin Console: People > Settings > Second Factor Authentication**

---

For more information about two-factor authentication in Jive, see [Two-factor authentication overview](#) on page 144 and [Second Factor Authentication reference](#) on page 147.

To configure two-factor authentication:

1. In the Admin Console, go to **People > Settings > Second Factor Authentication**.
2. Select **Enabled** to enable the feature.
3. In **Time stamp sec**, specify the time step for code renewal.

The default time step is 30 sec.

4. In **Window size**, specify the number of periods during which the verification code must be considered valid, in ms.
5. In **Reset device token expiration time**, set the period during which users will be required to authenticate themselves.

If a user is not able to finish authentication during this period they are required to restart the procedure.

6. In **Key representation**, select the algorithm to be used for the shared secret key.  
You can use either the BASE32 or the BASE64 algorithm.
7. In **Issuer**, set the name to be displayed for the community on the user device as follows:

- Leave the box empty to use the community root name.
- Or specify the name to be displayed.

For more information about the root name, see [Renaming root space](#).

8. Under **User device Reset allowed**, choose one of the following:

- **Enabled:** Users will be able to unpair their devices themselves, in the **Preferences** settings.
- **Disabled:** Users will not be able to unpair the devices themselves. The administrators will have this ability, on the User Summary page in the Admin Console.

9. Under **Basic Auth enabled**, select **Enabled** if the basic authentication option must be enabled for accessing the community via API.

If the basic authentication is disabled, session-based or OAuth authentication will be required for the

- **Enabled:** Basic authentication is allowed for the API requests.
- **Disabled:** Session-based or OAuth authentication is allowed for the API requests.

10 If you want two-factor authentication to be applicable only for a specific user group, specify the user group ID under **Targeted Second Factor Authentication**.

You can find the user group ID on the **Group Summary** page at **People > Management**.

11 Click **Save**.

This enables and configures two-factor authentication for your community.

#### ***Unpairing user device for a user***

When two-factor authentication is enabled, a community administrator can unpair a device used for authentication for a user.

---

**Fastpath: Admin Console: People > Management > User Search**

---

For more information about two-factor authentication, see [Two-factor authentication overview](#) on page 144.

To unpair a user device:

1. In the Admin Console, go to **People > Management > User Search**.
2. To narrow the list of users, type part of the username under **Search** and then click **Search** next to the box.

You can use the filtering options under **Search** for more accurate searches.

3. In the list of users, click on the username of the user whose user account you want to edit.

This opens the **User Summary** page with the detailed user account information. The status of the pairing is listed next to **Two-Factor Authentication Device Paired**, with the date of pairing (if any).

4. Next to **Two-Factor Authentication Device Paired**, click **Unpair device** and confirm the decision.

With the pairing removed, the user will be required to re-configure two-factor authentication on the next login.

### **Second Factor Authentication reference**

Here you can find the settings contained on the Second Factor Authentication page in the Admin Console.

---

**Fastpath: Admin Console: People > Settings > Second Factor Authentication**

---

For more information about 2FA, see [Two-factor authentication overview](#) on page 144 and [Setting up two-factor authentication](#) on page 145.

**Table 14: General**

Parameter	Description	Default setting
Second Factor Authentication	Indicated if the two-factor authentication is enabled. Available options are: <ul style="list-style-type: none"> <li>• <b>Enabled</b></li> <li>• <b>Disabled</b></li> </ul>	Disabled
<b>Time stamp sec</b>	The time step of the TOTP 2FA algorithm, in sec.	30
<b>Window size</b>	The number of periods the verification code is considered valid for the TOTP 2FA algorithm.	1
<b>Code length</b>	The length of the verification code.	6
<b>Reset device token expiration time</b>	The lifetime of validation tokens when restarting a paired device, ms. A user must pass all authentication steps during this period	180000
<b>Key representation</b>	The algorithm which is used to encrypt the key. Available options are BASE32 or BASE64.	BASE32
<b>Issuer</b>	The representation of the issuer in authenticator apps. By default, the value is empty and the community name is displayed. For more information, see <a href="#">Renaming root space</a> .	<empty>

**Table 15: User device Reset allowed**

Parameter	Description	Default setting
<b>User device Reset allowed</b>	Indicates if users are allowed to change the device used for authentication themselves. This adds the Two-factor Authentication tab on the Preference page. Available options are: <ul style="list-style-type: none"> <li>• <b>Enabled</b></li> <li>• <b>Disabled</b></li> </ul>	Enabled

**Table 16: Basic Auth enabled**

Parameter	Description	Default setting
<b>Basic Auth enabled</b>	Indicates is the basic authentication method for API requests is enabled. Available options are: <ul style="list-style-type: none"> <li>• <b>Enabled</b></li> <li>• <b>Disabled</b></li> </ul>	Disabled

**Table 17: Targeted Second Factor Authentication**

Parameter	Description	Default setting
<b>Group ID</b>	User groups for which 2FA is enabled. Available options are: <ul style="list-style-type: none"> <li>• -1: 2FA is enabled for all community users</li> <li>• &lt;user group ID&gt;: The ID of the user group. Only one group can be specified</li> </ul>	-1

## Enabling user name reminders

You can configure Jive to send out reminders for users who forget their user names: a user can click **I forgot my user name** prompt to the login screen and receive instructions for restoring it.

Clicking the **I forgot my user name** prompt directs the user to a place where they can generate an automatic email to the address they used when they registered their account.

---

**Fastpath:** Admin Console: People > Settings > Forgot Username

---

**Note:** The Forgot Username message template is automatically sent to users who forget their user name and request it. You can edit this template to customize the email message. For more information, see [Editing email notification templates](#) on page 180.

---

To enable user name reminders:

1. In the Admin Console, go to **People > Settings > Forgot Username** .
2. To let users restore their emails, select **Enabled**.
3. Click **Save Settings**.

## Configuring banning

The banning feature allows you to prevent users from accessing the community.

---

**Fastpath:** **Admin Console: People > Settings > Ban Settings**

---

You can block a person's access to Jive. For example, if someone becomes abusive in their messages (or moderating their content is too time-consuming), you might want to ensure that they can't log in anymore. You can ban them through their login credentials or their IP address. Alternatively, you can prohibit specific actions of a user; for more information, see [Managing interceptors](#) on page 121.

---

**Note:** If you use SAML or Kerberos SSO, you can't use the **Disable Login** setting to ban federated users. To ban federated users, you need to remove their access on the IdP. Alternately, you can turn off the **Enable disabled user account on login** setting in your SSO settings before disabling these users.

---

## Ban settings

Use the **Ban Settings** tab to set general properties for the ban feature. You can enable or disable the feature. Disabling the feature disables all bans that you currently have in effect.

You can arrange to send emails to people that you ban. The message is based on a template you can edit; for more information, see [Editing email notification templates](#) on page 180.

To enable user banning:

1. In the Admin Console, go to **People > Settings > Ban settings** .
2. Next to **Ban Users**, select **Enabled** to enable banning.
3. Next to **Notify Banned Users**, select **Yes** to send emails with the reason for a ban to the bent users.
4. Click **Save Settings**.

## Ban a user account

Through the **Ban User Account** tab, you can ban someone by specifying their username. You can also set the duration of a ban. And you can leave a record for other administrators by adding a comment, such as a note about the reason you banned the user.

For each person you ban, you set a ban level that determines whether you're banning them from logging in or merely posting content. If the ban level is set to **Disable Login**, the banned user is immediately logged out from Jive and won't be able to log back in until the ban is lifted.

### Ban an IP address or a range of IP addresses

If you have IP address tracking turned on, you can ban an IP address or a range of addresses. First, enable IP address tracking by setting the system property `skin.default.trackIP` to `true`. (For more information on system properties, see [Fine-tuning with system properties](#) on page 240.) Then enter the IP address you want to ban. To ban a range of addresses, use a wildcard `*`, for example, `111.111.1.*`.

## Configuring status levels


Jive records all the activities that community members perform in Jive and assigns badges based on point values and levels. Community members can see these standings and levels gained reported in Inbox and on the user profile.

### About status levels

---

**Fastpath:** Admin Console: People > Settings > Status Level Settings

---

People can accrue status by earning points as they create and respond to content in Jive. Assigning status levels this way is sometimes known as *badging*. Over time, people develop a reputation for reliability and authority in their favorite areas. The more people participate, the more information that is available for the community as a whole. Where a person's name is displayed, the user interface displays a status icon or badge, such as , corresponding to the number of points the person has accrued.

---

**Note:** The settings on the Status Level Settings page in the Admin Console are unavailable if you are using the Gamification add-on. For more information, see the [Gamification Help](#).

---

### Tips for status level configuration

- Set the number of points per scenario based on the kinds of activity you want to reward. For example, if you want to provide a context in which questions are usually answered, award more points for correct and helpful question responses. For more information, see [Adjusting status scenarios and points](#) on page 151.
- Define status levels or badges that people should be enthusiastic about. You can use any theme that fits your community goals and update the status levels accordingly. For more information, see [Adding status levels](#) on page 152.
- Offer rewards or recognition for people who reach or maintain certain status levels.

---

**Note:** When content is deleted, status points are also deleted.

---



## Adjusting status scenarios and points

*You can set how many points are awarded for a given action (also called scenario), the user takes in the application. For example, if you give the action User's status was liked 1 point, then a user's status points will increase by one point whenever someone likes their status.*

---

**Fastpath: Admin Console: People > Settings > Status Level Settings**

---

You can disable a scenario when you want that action not to be included in the status level calculation.

To adjust the action and point scheme:

1. In the Admin Console, go to **People > Settings > Status Level Settings**.
2. To disable rewards for certain actions, clear the check boxes for the actions in the **Scenario** list.
3. To enable rewards for certain actions, select the check boxes for the actions in the **Scenario** list.
4. To adjust point levels for actions, correct the point rewards for available actions in the **Scenario** list.
5. Under the **Scenario** list, click **Save**.

## Editing status levels

You can edit the existing status levels to adjust the reward scheme.

---

**Fastpath: Admin Console: People > Settings > Status Level Settings**

---

You can define the status levels themselves, setting the point range that the status level represents. By default, for example, the application includes the following status levels: master (501-1000 points); junior (101-500 points); newbie (0-100 points). You can configure the levels, along with how many points correspond to an action.

The application includes more than 50 status level images for you to use. You can also replace existing images with new ones or add your own images and associate them with status levels that you create.

To edit an existing status level:

1. In the Admin Console, go to **People > Settings > Status Level Settings**.
2. Locate the level in the list and click **Edit** next to it.

Its current property values will appear in the **Add/Edit status level** box.

3. Change the values as you like.

For more information about level properties, see [Status level properties](#) on page 152.

4. Click **Save**.



## Adding status levels

*You can create new status levels if you need them.*

---

**Fastpath: Admin Console: People > Settings > Status Level Settings**

---

You have several status levels configured by default. You can adjust them for your purposes, as described in [Editing status levels](#) on page 151.

If you need more status levels than available by default, you can create your own status levels. For each level, you specify its name, description, an image to be used as a badge, and the point range. For more information, see [Status level properties](#) on page 152.

To add a new status level:

1. In the Admin Console, go to **People > Settings > Status Level Settings**.
2. Under **Add/Edit status level**, click **Cancel** to clear the fields.
3. Enter the values you want.

For more information about level properties, see [Status level properties](#) on page 152.

4. Click **Save**.

### Status level properties

Here you can find the list of properties for status levels.

**Table 18: Status level properties**

Setting	Description
<b>Name</b>	The name of the status level. This appears when users hover the mouse over the status badge.
<b>Description</b>	Additional text to describe the status level. By default, this doesn't appear in the user interface.
<b>Add or replace existing level icons</b>	You can add your own images by clicking <b>Add or replace existing status level icons</b> , and then selecting your image and uploading it. Images uploaded this way are stored in <code>&lt;jive.in-stance.home&gt;/www/resources/images/status</code> and become available in the <b>Image Path</b> and <b>Large Image Path</b> image pickers.

Setting	Description
<b>Image Path and Large Image Path</b>	<p>The application includes more than 50 status level images. You can choose from among the included icon images by selecting <b>Image Path</b> or <b>Large Image Path</b> and then clicking <b>Pick Image</b>.</p> <p>To add your own images, you must add your custom image files to <code>&lt;jive.instance.home&gt;/www/resources/images/status</code>.</p> <p>You can use the <b>Add or replace existing level icons</b> box to upload images. This is useful if you don't have scp or other direct access to the application file server.</p> <p>Alternatively, if the <code>&lt;jive.instance.home&gt;/resources</code> directory doesn't exist, you can create a symlink to <code>/usr/local/jive/var/www/resources/images/status</code> by using the following commands:</p> <pre>cd &lt;jive.instance.home&gt; ln -s /usr/local/jive/var/www/resources resources</pre> <p>You can use GIF or other types of image files, but you should use the same naming scheme as the existing images: <code>statusicon- &lt;number-in-sequence&gt;.gif</code>. You might want to start your numbering at some higher level to avoid problems if application upgrades include more images. For example, to add five new images (where included images currently end at number 52), you could add images called <code>statusicon-100.gif</code>, <code>statusicon-101.gif</code>, <code>statusicon-102.gif</code>, <code>statusicon-103.gif</code>, and <code>statusicon-104.gif</code>.</p>
<b>Point Range or Group</b>	<p>You can associate this status level with either a point range or a user group. Entering a point range ties this status level to users' activity in the community. Alternatively, if you select <b>Unbounded</b>, no point range is associated with this status level.</p> <p>If you want certain users in your community to always have a particular status level regardless of their activity, select <b>Group</b>. This associates the selected status level with a user group that you select. For example, you could define a user group made up of a few community managers or gurus, then associate a special status level to them in order to have a recognizable name and icon visible to other people.</p>

## Managing Avatars

Avatars are one way for people to make their participation in the community more personal. You can configure the avatar settings for the community and manage the avatars that are available to your users by default.

An avatar is an image that represents a person in the community. A person's avatar is displayed when they contribute. You can turn on or off avatars in your community, specify the limits for displayed avatars, let the users upload their own avatars, and manage the gallery of the avatars.

---

**Fastpath: Admin Console: People > Settings > Avatar Settings**

---

### Managing default avatars in the gallery

The application includes an avatar gallery of images. By default, the avatars are available for the registered users of your community. You can add new images to the gallery and delete obsolete images.

With avatars enabled, users see a **Change photo & avatar** link in the Actions list of their profile page. Depending on how you've set up the feature, users are able to select from the set of avatar images or upload their own.

For more information, see [Managing avatar gallery](#) on page 155.

### Supporting user-uploaded avatars

For the users to personalize their profiles, you can enable avatars and let the users upload their avatars. Users can select one of the default images or upload new images, such as their photos.

### Moderating user-uploaded avatars

You can have every user-uploaded avatar image added to a moderation queue for approval by checking **Moderate uploaded user avatars**. For more information, see [Setting up user-uploaded avatar moderation](#) on page 429.

### Resizing avatars

You can set the maximum height or width that uploaded avatars should be. The default size is 128 by 128 pixels. Additionally, you can enable auto resizing of uploaded avatars to make it easier for people to upload the images they want to use.

### Configuring avatar settings

Enabling and configuring avatars let users select avatars from the gallery and upload new avatars themselves.

---

**Fastpath: Admin Console: People > Settings > Avatar Settings**

---

For more information, see [Managing Avatars](#) on page 154.

To configure the avatar settings:

1. In the Admin Console, go to **People > Settings > Avatar Settings**.
2. To enable avatars, select **Enable Avatars for all Registered Users** next to **Permissions**.
3. To let the system resize the avatars to fit into the limits, select the **Auto Resize Uploaded Avatars** check box.
4. Specify the avatar limits in pixels in **Maximum Image Width** and **Maximum Image Height**.

The default setting is 128x128 px.

5. To enable users to upload their avatars, do the following:
  - a) Select **Enabled** next to **User Uploaded Avatars**.
  - b) Specify the **Maximum number of uploaded avatars per user** in the box.
  - c) If the user avatars must pass moderation, select the **Moderate uploaded user avatars** check box.
6. Click **Save Settings**.

With avatars enabled, users see a **Change photo & avatar** link in the Actions list of their profile page. Depending on how you've set up the feature, users are able to select from the set of avatar images or upload their own.

### Managing avatar gallery

As an administrator, you can delete existing default avatars, upload new default avatars, and define the default one.

For more information, see [Managing Avatars](#) on page 154.

To upload a new avatar or delete an obsolete one:

1. In the Admin Console, go to **People > Settings > Avatar Settings**.
2. To add an avatar to the gallery, under **Create New Avatar**, browse to and upload your new image.
3. To remove an avatar from the gallery, select an avatar in the gallery, and then click **Delete Avatar**.
4. To define the avatar to be used by default, select the avatar, and then click **Set as Default**.
5. To restore the default avatar, click **Reset to Default**.

## Configuring user update settings

You can enable or disable status updates in your community. Status updates allow your end users to post quick status updates about what they're doing.

By default, communities have status updates enabled to encourage users to contribute to the community.

---

**Fastpath:** **Admin Console: People > Settings > User Status Update Settings**

---

To configure user update settings:

1. In the Admin Console, go to **People > Settings > User Status Update Settings**.
2. To enable status updates, select the **Enable User Status Updates** check box.
3. To give users the ability to repost the status updates, select the **Enable Reposting of User Status Updates** check box.
4. To enable status updates for projects and groups, select the **Enable Status Updates in Social Groups and Projects** check box.
5. To adjust the length of a status message, specify the maximum number symbols in a status message in **Character Limit**.
6. Click **Save**.

## User status update settings reference

Here you can find the settings available for status updates in your community.

---

**Fastpath: Admin Console: People > Settings > User Status Update Settings**

---

**Table 19: Status update configuration options**

Setting	Description
<b>Enable User Status Updates</b>	With this enabled, users can post status updates that appear to the whole community.
<b>Enable Reposting of User Status Updates</b>	With this enabled, users can repost the status updates of fellow users.
<b>Enable Status Updates in Social Groups and Projects</b>	With this enabled, users can post status updates in social groups and projects.
<b>Character Limit</b>	The character limit of a status update message. The default limit is 420.

## Managing search

Jive provides configurable search access to content and people, as well as access to external search engines that support OpenSearch.

---

**Fastpath: Admin Console > System > Settings > Search**

---

For more information about Jive Search services, see [Understanding Jive Search](#).

## Selecting Search service

A Jive On-Premise installation uses the On-Premise Search service by default, and a Hosted installation uses the Cloud Search service by default. You can change the search service if necessary.

A Jive instance can use either Cloud or On-Premise Search service. For more information about them, see [Understanding Jive Search](#).

### Hosted deployment

When you elect to use Jive in a Hosted environment, by default, you use the Jive Cloud Search service with all its benefits. If you want your Hosted instance of Jive to use an On-Premise Search service, you need to contact [Support](#) and Jive Hosting by filing a support ticket making this special request.

### On-Premise deployment

---

**Fastpath: Admin Console: System > Settings > Search**

---

Your On-Premise installation of Jive can use an On-Premise Search service once you install Search service on its own node, as described in [Installation overview](#). With an On-Premise installation of Jive, you can switch between Cloud or On-Premise Search services, but when you change the Search service, you must initiate a content index rebuild.

### Choosing Cloud Search Service

When you use Jive in a Hosted environment, you can choose to use the Cloud Search service.

---

**Fastpath: Admin Console: System > Settings > Search**

---

When configuring Cloud Search service, you specify the public cloud search endpoint in your area. For connection information, see [Search service](#).

To use Cloud Search with an On-Premise implementation of Jive:

1. File a ticket with Jive support requesting access, so that the IP address is whitelisted in your instance. Every IP address connecting to Jive search needs to be granted access.
2. In the Admin Console, go to **System > Settings > Search**, then open the **Content Search > Index Tasks** tab.
3. Under **Search Service Configuration**, select **Cloud Search Service**.
4. Select the endpoint that makes sense for your location.

For more about the data centers and their locations, see [Cloud Search service](#).

5. Click **Save Settings**.

After you change the search service, you must rebuild search indexes, as described in [Reindexing content search](#).

## Choosing On-Premise Search service

When you use Jive in a Hosted environment, you can choose to use the On-Premise Search service.

---

**Fastpath: Admin Console: System > Settings > Search**

---

To choose On-Premise Search service for an instance that is deployed on-premise:

1. Install the On-Premise Search Service. For more information, see [Installation overview](#).
2. In the Admin Console, go to **System > Settings > Search** , then open the **Content Search > Index Tasks** tab.
3. Under **Search Service Configuration**, select **On-Premise Search Service**.
4. Enter the host and port for the service you installed.

Options	Description
<b>Search Service Host</b>	The host name that Jive can use to connect to the Search service. For On-Premise Search, this is the host name for the node where you installed Search. The default is <code>localhost</code> . For more information on Search node size, see <a href="#">System requirements</a> .
<b>Search Service Port</b>	The TCP port that Jive can use to connect to the Search service. The default is <code>30000</code> .

5. Click **Save Settings**.

After you change the search service, you must rebuild search indexes, as described in [Reindexing content search](#).

## Configuring content search

Content search indexes documents, discussions, blogs, status updates, and external content.

In addition to content written and published with the community text editor, the search feature also searches files of the following types: `.html`, `.rtf`, `.txt`, `.pdf`, `.ppt`, `.pptx`, `.doc`, `.docx`, `.xls`, `.xlsx`, `.odt`, `.ods`, and `.odp` (OpenOffice formats). The application also searches the contents of archives of the `.zip` format.

---

**Fastpath: Admin Console: System > Settings > Search > Content Search**

---



## Reindexing content search

You can manually reindex content search, but it takes a long time and can slow performance. We don't recommend reindexing manually unless you have a specific search index problem you need to fix.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **Content Search > Index Tasks**

---

Having the application regularly update the search indexes is very handy, but rebuilding an index can be very time-consuming. You should only manually rebuild the search index if it becomes corrupted or you find you're missing significant amounts of content in search results. The rebuild processing happens on the web app node you are accessing when you initiate the rebuild. This node sends the data to the external search service you have configured. For additional information, see [Rebuilding On-prem HA Search Service](#).

You can rebuild the content search index for the entire community or for only just some part of it for specific content items or places.

---

: Before you rebuild the community index, consider performance and the needs of your site users. We recommend that you do not reindex search manually during peak usage hours, for example, or during a site-wide campaign or an event that results in high usage.

---

- To rebuild the search index in the event of a search problem:
  - a) In the Admin Console, go to **System > Settings > Search** , then open the **Content Search > Index Tasks** tab.
  - b) Under **Rebuild content index**, click **Rebuild Index**.  
You should not rebuild the search index during high usage hours.
- To check the index status of an individual content item or place and rebuild the index, type the URL of the content item in the **Content URL** text box and click **Retrieve Modification Date**. If the date is old, you can
  - a) In the Admin Console, go to **System > Settings > Search** , then open the **Content Search > Index Tasks** tab.
  - b) Under **Rebuild content index**, in **Content URL**, specify the URL of the content item or place you want to check.
  - c) Click **Retrieve Modification Date**.
  - d) If necessary, click **Update in Index** to update that item in the index.

## Content Search Service status

You can use the Content Search service status to track the successes and failures of calls to the different services for search.

---

**Fastpath:** **Admin Console > System > Settings > Search > Content Search**

---



<b>Activity Ingress</b>	Jive uses this service to send activity data to the search system. Search uses this service to receive everything that has been indexed. For example, content creation, updates to content, user creation, user updates, place creation, updates to places, likes, and comments all get posted to the activity ingress and get indexed. Failures to this service mean that events will queue up on the web app node waiting to be pushed into search.
<b>Query</b>	Jive uses this service to execute search queries. The Query service enables Jive to access the content that has been indexed. For example, Jive uses this service when you use spotlight search on the Search page, when you select content under the "Show more like this" heading, when you use the user picker, and when you use most fields that auto-suggest searches as you type. Failures to this service mean searches will fail.
<b>Directory and Tenancy</b>	<p>These services always use the same host and port. If they use <code>localhost</code>, they are referring to the host and port that you configured for On-Premise search. This service is the entry point into search and tells Jive where to go for all the other services, and it assigns a tenant ID to the Jive instance so all search services can uniquely identify it.</p> <p>Failures to these services mean search is not working.</p> <ul style="list-style-type: none"><li>• If you are using On-Premise search, make sure the Search node is up and running, and that you can telnet from the Web App node to the On-Premise Search node at the configured port.</li><li>• If you are using Cloud search, make sure your firewall is set up properly. If your firewall has been set up properly, then gather your logs and contact <a href="#">Support</a>. For more on ports, see <a href="#">List of required ports and domains</a>.</li></ul>

## Configuring search synonyms for content items

You can configure the search feature to recognize synonyms for improved search results.

---

**Fastpath:**   **Console:** **System > Settings > Search** , then **Content Search > Synonyms**

---

The synonym search feature improves search results by allowing you to create lists of synonyms. For example, you might want a search for "big" to return results for "large", and vice versa. Or, if your users search using terms specific to your industry, you might want to set up a synonym that associates commonly used terms, such as "mobile" and "phone".

Synonyms are language-specific. If you have multiple languages enabled, you need to enable them per language. For more information about enabling search for multiple languages, see [Enabling content search in multiple languages](#) on page 169.

Note that by default, new synonyms work only on new content. If you want to apply new synonyms to preexisting content, you need to rebuild the Content Search index, which takes significant time and can affect system resources. For more information, see [Reindexing content search](#) on page 159 and [Configuring search index rebuild](#).

To set up search synonyms:

1. In the Admin Console, go to **System > Settings > Search** , then open the **Content Search > Synonyms** tab.
2. Under **Synonyms**, type in a comma-separated list of synonyms for terms.
3. Click **Add Synonyms**.
4. Rebuild the content search index, as described in [Reindexing content search](#) on page 159.

The synonyms for terms are added to the system and will be available for the newly created items.

---

: Before you rebuild the community index, consider performance and the needs of your site users. We recommend that you do not reindex search manually during peak usage hours, for example, or during a site-wide campaign or an event that results in high usage.

---

## Promoting content search results

You can create rule-sets to ensure that particular keywords always return specific content results, even when that keyword does not occur in the content.

---

**Fastpath:** **Admin Console > System > Search** , then **Content Search > Promoted Results**

---

Promoting a result ensures that when you type certain keywords, a content item you select always appears at the top of the results. You can associate multiple keywords or key phrases with a single content item by entering the terms separated by commas.

You can also associate different content items with the same keyword so that several content items show up when a user queries that keyword. Use the **Priority** field to determine which promoted results for a keyword appear first. For example, if you wanted the European, American, and Asian holiday schedules in your organization to be promoted for the keyword “holidays”, you could create a rule for each document linking it to the keyword “holidays.” Then you could rank these schedules 1 and 2 in the results by assigning the rules priorities 0 and 1.

Note the following when promoting results:

- Promoted search only works on documents that are visible to the entire community. You should avoid promoting any document or content access to which is restricted.
- You can promote a maximum of two links per keyword in one language by default. If required, you can change the limit by specifying a new limit in the `search.promotedResults.limit` parameter.
- Keywords must be at least three characters long.
- Single keywords can function as wildcards in spotlight search, but when you specify a key phrase, the query must be an exact match for the key phrase. (Standard searches typed in the search page, or entered by typing in the search field and pressing `Enter` do not support wildcards unless you type `*` as part of the string.) For example, if you specify "quarter" as a keyword, your selected content is returned for spotlight search queries on "quart" as well as "quarter." But if you specify "quarterly sales," your selected content is not returned for queries on "quarter," "quarter sales," "quarterly," or "sales," only for queries on "quarterly sales."
- No two rules can have the same priority number, so multiple rules for the same keyword or keyword combination must be in sequential order.
- Spotlight search does not need to have all promoted words in order to promote a result.

To create rules and rulesets for promoting results:

1. In the Admin Console, go to **System > Settings > Search**, then open the **Content Search > Promoted Results** tab.
2. Under **Promoted Results Rules**, in **Language**, select the locale for which you want to add promoted links.
3. Under **Add or Edit a rule**, add a link for promotion as follows:

- a) In **Priority**, type the priority of the link.

This is a number of the link in the list when the links are displayed to users. The starting number is 0.

Priority applies only within a group multiple rules with the same keyword or keywords. The rules are automatically set in the order in which you create them. Moving a rule to a higher priority moves other rules down in priority, affecting the numbering of all rules below it: the rules above and below it are renumbered to create a sequential list.

- b) In **Keywords**, add one or more keywords separated by commas.

- c) In **Content Link**, enter the full URL of a content item.

For example, this can be `https://yourcommunity.com/docs/DOC-46692`.

- d) Click **Add**.

4. If you want more results to be returned for the same keyword, add more rules with the same keyword and different content items.

Because the rules appear in one sequential list, you might end up with a sequence like this one, which represents two rulesets:

24. keyword1 document g 25. keyword1 document a 26. keyword1 document q 27. keyword2, keyword3 document x 28. keyword2, keyword3 document r 29. keyword2, keyword3 document n

The first ruleset says that when keyword 1 appears in a query, the first three results must be documents g, a, and q. The second ruleset says that when either keyword 2 or keyword 3 appears in a query, the first three results are documents x, r, and n.

## Configuring user search

You can use the Admin Console to adjust user search performance and change the user experience.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search**

---

### Enabling user search

You can enable searching for user information, or turn user searching off.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search**

---

With user search enabled, content is added to the search index as soon as it's published, rather than waiting for the next index update time.

To enable user search:

1. In the Admin Console, go to **System > Settings > Search** , then open the **User Search** tab.
2. Under **User Search Status**, select **On**, and then click **Update**.

### Configuring stop words for user names

For user searches, you can configure a list of words to be ignored in searches.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search > Stop Words**

---

Stop words are the filter out common structure-class words (that is, function words) from search operations, for example, "an", "for", or "of". For user searches, you can set your system to ignore specific words in the community languages.

To configure stop words for user searches:

1. In the Admin Console, go to **System > Settings > Search** , then open the **User Search > Stop Words** tab.
2. In **Language**, select the language for the stop word list.
3. In the text box, type the stop words separated by commas.
4. Repeat Steps Step 2 on page 163–Step 3 on page 163 for each of the languages you want to add stop words.

5. Click **Save Settings**.
6. Rebuild the index, as described in [Reindexing user search](#) on page 164.

## Enabling automatic user reindexing

You can enable regular updates of the user search index.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search > Search Settings**

---

To enable automatic user reindexing:

1. In the Admin Console, go to **System > Settings > Search** , then open the **User Search > Search Settings** tab.
2. In **Automatically index user changes**, select **Yes**.
3. In **User index update time**, specify the frequency of the updates.
4. Click **Save Settings**.

## Reindexing user search

You can manually reindex user search, but it may take a long time and can slow performance. We don't recommend reindexing manually unless you have a specific search index problem you need to fix.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search > Index Tasks**

---

Rebuilding an index manually can be very time-consuming. You should only manually rebuild if you really have to, for example, if you add or remove a synonym or the search index becomes corrupted. Initiate a user index rebuild to add new user information to the index without rebuilding the index.

---

: Before you rebuild the community index, consider performance and the needs of your site users. We recommend that you do not reindex search manually during peak usage hours, for example, or during a site-wide campaign or an event that results in high usage.

---

You can rebuild the user search index for the entire community or the users added after the last index rebuild.

- To rebuild the search index in the event of a search problem:
  - a) In the Admin Console, go to **System > Settings > Search** , then open the **User Search > Index Tasks** .
  - b) Click **Rebuild Index**.

You should not rebuild the search index during high usage hours.

- To rebuild the search index for new users:
  - a) In the Admin Console, go to **System > Settings > Search** , then open the **User Search > Index Tasks** .
  - b) Click **Update Index**.

## Configuring search synonyms for user names

You can configure the search feature to recognize synonyms of names for improved search results.

---

**Fastpath:** **Admin Console: System > Settings > Search** , then **User Search > Synonyms**

---

You can set up synonyms for the names of users to improves results for user searches. For example, you might want to set up "James, Jim, Jimmy" or "Susan, Suzy, Susie".

Synonyms are language-specific. If you have multiple languages enabled, you need to enable them per language. For more information about enabling search for multiple languages, see [Enabling content search in multiple languages](#) on page 169.

Note that by default, new synonyms work only on new users. If you want to apply new synonyms to preexisting users, you need to rebuild the User Search index, which may take significant time and can affect system resources. For more information, see [Reindexing user search](#) on page 164.

To set up search synonyms:

1. In the Admin Console, go to **System > Settings > Search** , then open the **User Search > Synonyms** .
2. Under **Synonyms**, type in a comma-separated list of synonyms for user names.
3. Click **Add Synonyms**.
4. Rebuild the content search index, as described in [Reindexing user search](#) on page 164.

The synonyms for terms and names are added to the system and will be available for the newly created items.

---

: Before you rebuild the community index, consider performance and the needs of your site users. We recommend that you do not reindex search manually during peak usage hours, for example, or during a site-wide campaign or an event that results in high usage.

---

## Configuring OpenSearch

You can make some external search engines available to users in your community.

If a search engine supports the OpenSearch format for sharing of the search results, you can add support for it. In this case, the search engine is used in addition to the internal search engine when people search for content in Jive. Jive communities support OpenSearch.

---

**Fastpath: Admin Console: System > Settings > OpenSearch Engines**

---

Engines that support OpenSearch provide a descriptor XML file and usually publish the file at a public URL. The descriptor tells OpenSearch clients what they need to know to query the search engine.

When adding a search engine, you need to provide the engine description. It can be a descriptor XML file (or its URL), or you can enter the required information yourself. Additionally, you might get prompted for more information, such as login credentials if the engine is secure. Note that you can edit engine properties later.

To add an OpenSearch search engine:

1. In the Admin Console, go to **System > Settings > OpenSearch Engines**.
2. If you have the descriptor XML file of the engine, do the following:
  - a. In **Descriptor URL**, specify the URL of the descriptor XML file.
  - b. Click **Add engine from Descriptor URL**.

The application retrieves the descriptor file from the URL, then retrieves the required information from the file.
  - c. If prompted, enter the required additional settings.

For example, you can be prompted to specify the login credentials if the engine is secure.
3. If you don't have the descriptor XML file, do the following:
  - a. Click **Add engine from form** to open the entry form.
  - b. Provide at least the following settings:
    - In **Name**, enter the search engine name.
    - In **Search URL**, specify the URL for sending user queries.
    - In **Search Result Content Type**, select the content type the search engine results are returned in.
    - In **Query Test Term**, enter the term you use for testing.
    - If the engine is secure, enter the login credentials in the **Username** and **Password** boxes.

For more information about search settings, see [OpenSearch Engines property reference](#) on page 167.
  - c. Click **Update**.

The search engine is listed on the **OpenSearch Engines** page. You can edit its properties when required.

### Jive as OpenSearch provider

The Jive application is an OpenSearch provider, although OpenSearch isn't a good replacement for searching the content it contains. You can point your OpenSearch reader to Jive OpenSearch XML descriptor if required.



For OpenSearch readers that aren't able to autodetect the descriptor, you can add it manually. The OpenSearch descriptor for your community is located at `http://<jiveURL>/opensearch.xml`. For example, the Worx descriptor can be found at `http://jivesoftware.com/community/opensearch.xml`.

## OpenSearch Engines property reference

Here is the list of properties for adding and configuring OpenSearch engines to your community.

---

**Fastpath: Admin Console: System > Settings > OpenSearch Engines**

---

You can view and edit the properties of a search engine when you manually add a new engine or edit the properties of a configured engine.

**Table 20: Properties of OpenSearch Engines**

Option	Description
<b>Name</b>	The name of the OpenSearch engine.
<b>Description</b>	The description of the OpenSearch engine.
<b>Descriptor URL</b>	The URL of the descriptor XML file.
<b>Icon URL</b>	The URL of an icon representing the search engine. The Jive app displays this icon in the UI.
<b>Search URL</b>	The URL that is used to send user queries.
<b>Search Result Content Type</b>	<p>The content type in which the search engine's results are returned.</p> <p>Note that if this is a type that the application can parse, such as HTML (<code>text/html</code>), the results are displayed directly; if not, the application displays a link through which the user can separately search the engine site itself.</p> <ul style="list-style-type: none"> <li>• If you specify HTML as the content type, a sidebar displays a link that people can use to search for their phrase at the OpenSearch location. If they search, their results are displayed in a new window.</li> <li>• If you specify RSS or Atom as the content type, the application displays a new tab with the <b>Name</b> value. The application parses returned results into a format that displays on the search results page, under the new tab. If you want to see a preview of the first 8 OpenSearch results displayed directly inside the main search results, so users are more readily aware of the OpenSearch alternative, you should also select the <b>Show result preview</b> check box.</li> </ul>
<b>External Search URL</b>	The link that is displayed to users through which they can separately search the engine site itself. The field is available only when RSS ( <code>application/rss+xml</code> ) or Atom ( <code>application/rss+xml</code> ) is selected in <b>Search Result Content Type</b>
<b>Query Test Term</b>	A term you use to test queries.



Option	Description
<b>Maximum Number of Results</b>	The maximum number of results displayed on the search page.
<b>Username</b>	The username if the search engine requires login credentials
<b>Password</b>	The password if the search engine requires login credentials
<b>Enabled</b>	The check box that indicates if the search engine is enabled or disabled. By default, the check box is selected, and the search engine is available to users.
<b>Show result preview</b>	The check box that indicates whether OpenSearch results are shown in the body of your search results themselves. When you select this checkbox for any OpenSearch provider, your main search results show a preview of up to 8 results from the OpenSearch provider after the first four results from your Jive site. This setting makes OpenSearch more noticeable to users who might overlook its presence in the left pane of search. The check box is cleared by default.

## Configuring Service Directory for On-Premise Search

The On-Premise Search service relies on a configuration file in `/usr/local/jive/services/search-service/` called `serviceDirectory.json` that provides the host and port the On-Premise Search service needs to bind to for all of the logical services hosted within it.

Because all of the services in On-Premise search are provided by the Search service process, the host and port for every logical service needs to be the same and needs to point to a non-loopback local network interface. The default host value is `0.0.0.0`, which causes the On-Premise search to scan all local network interfaces and choose the first non-loopback one it finds. On multi-homed machines, On-Premise search may not choose the desired network interface. Therefore, if you are running On-Premise search on a multi-homed machine, you need to explicitly configure which network interface you want to bind to by changing the host values in the `serviceDirectory.json` file.

---

### Important:

The On-Premise Search service may be bound to the wrong interface if:

- The service is up and locally accessible.
  - The service is not accessible from the web application nodes, but you can ping the On-Premise Search host from the web application nodes.
-

Here is a sample file:

```
{
  "defaultServiceDirectory" : {
    "directory" : {
      "host" : "search.yourOrganization.com",
      "port" : 30000
    },
    "search" : {
      "host" : "search.yourOrganization.com",
      "port" : 30000
    },
    "searchIndexManage" : {
      "host" : "search.yourOrganization.com",
      "port" : 29000
    },
    "rebuildSearchIndex" : {
      "host" : "search.yourOrganization.com",
      "port" : 29000
    },
    "activityIngress" : {
      "host" : "search.yourOrganization.com",
      "port" : 29000
    }
  }
}
```

## Configuring JVM Settings for the Search Process

If you're using On-premise Search, you can configure the heap, ports, logging path, and other settings for the Java virtual machine (JVM) that runs the Search process.

For the list of the settings you can adjust for On-premise Search, see [Startup property reference](#).

---

### Note:

- Best practice is to set minimum and maximum heap sizes to the same value.
  - The heap size you set for the Search service is independent of the heap size you set for the web application.
- 

## Enabling content search in multiple languages

You can enable documents to be indexed and searched in a language-specific manner.

---

**Note:** Content synonyms are language-specific when you enable multiple language search, so make sure you set them per language. For more on synonyms, see [Configuring content search](#) on page 158.

---

---

**Fastpath:** **Admin Console > System > Settings > Locale**

---

To enable search in multiple languages:

1. In the Admin Console, go to **System > Settings > Locale** and enable multi-language search and enter the allowed search languages.
2. Go to **Spaces > Settings > Space Settings > Locale** and set the locale for any space whose content should be indexed in a language other than the system default language or its parent space language.
3. Go to **System > Settings > Search > Content Search > Index Tasks > Rebuild index** and rebuild the search index. For more information, see [Reindexing content search](#) on page 159.

---

: Before you rebuild the community index, consider performance and the needs of your site users. We recommend that you do not reindex search manually during peak usage hours, for example, or during a site-wide campaign or an event that results in high usage.

---

## Setting up email

*Jive can send email to users on various occasions. For example, email notifications can be sent about stream updates and as welcome messages.*

*Also, Jive can receive email from users to create new content or to reply to existing content. For example, a user can create discussions and blog posts in the application directly from the email. You can choose how email is used and customize the email templates.*

## Getting set up with email

Here are some things to be aware of when setting up your community's email services.

### Using user email addresses

One of the requirements in Jive communities is that users must have unique email addresses. This allows user's email addresses to be used as user names within communities.

Despite that, we recommend that you do not set Jive user names to be the email addresses of users. If you do this, the user's email address string show up in the user's profile page URL, even if email visibility is set to Private To User.

If you are using SSO for authentication, you should set it to authenticate each user's user name.

For more information, see [Configuring incoming email](#) on page 174.

## Configuring outgoing SMTP email server

Jive uses an outgoing SMTP email server for sending messages, such as content update notifications, task reminders, and registration confirmations. You can do this manually in the Admin Console or during the setup process via the Setup wizard.

For more information, see [Configuring outgoing \(SMTP\) email](#) on page 172 and [Configuring application with the Setup wizard](#).

## Configuring incoming email server for creating content via email

You can enable features through which people can post content to the application by sending email to a particular address. For that, you should set the connection to an incoming email server so the instance can receive email messages from users. You can do this manually in the Admin Console or during the setup process via the Setup wizard.

For more information, see [Configuring incoming email](#) on page 174 and [Configuring application with the Setup wizard](#).

## Disabling email in test environments

In test environments, you can temporarily disable email to and from the application. Your production instance is typically set up to both send email notifications (SMTP) and access an email account (Email Monitor) or server (Advanced Incoming Email). In your test production instance, you can temporarily change these settings; otherwise, you may find that the new test instance generates email notifications that look like they're coming from your production instance. This can be very confusing to users and might end up unnecessarily burdening your email servers.

For more information, see [Disabling email in test environments](#) on page 179.

## Editing and localizing email templates

Jive includes a set of email templates for emails it sends to users in response to certain events. You may want to edit the default email notification templates to perform content changes or to include password reset notifications.

For more information, see [Editing email notification templates](#) on page 180 and [Localizing email notification templates](#) on page 184.

## Preventing email spam

There are a few email-related ways to help prevent spam in your community. For more information, see [Spam prevention](#) and [Advanced spam prevention](#).

## How incoming and outgoing email works

Jive communities can both send emails to user and receive emails from users.

When sending email, Jive uses a multi-part format, where the email contains both a plain text version of the message and an HTML version. If the user's email client supports HTML rendering, then the user most likely sees the HTML-formatted version. If a user is using an older email client or an email client on a mobile device with limited rendering capabilities, the user may see only the plain text version of the email.

When receiving and processing incoming emails, Jive only consumes the plain text portion of the multi-part email.

## Creating content by using email

*There are several different kinds of supported email clients that you can tie into Jive, such as Microsoft Windows Outlook, Mac Mail, and Gmail. You may notice inconsistent results when creating Jive content by email because every email client creates emails in its own unique way. For this reason, do not use styles or images in email content that you post to Jive.*

In general, the incoming and outgoing email features of Jive were designed to handle simple replies to content and creation of content in Jive.

Jive only creates content from the plain text version of an email, which may look significantly different than the rich text version of the email you created or can view in your email application.

In addition, Jive adds email attachments as content attachments if the created content item supports attachments. For example, a new discussion supports attachments, but a comment on a document does not.

Therefore, keep the text clean and do not use styles or embed images while using emails to post content on Jive.

## Configuring outgoing (SMTP) email

Jive uses an outgoing SMTP email server for sending messages, such as content update notifications, task reminders, and registration confirmations. You configure a connection to the server in the Admin Console or by using the Setup wizard.

---

**Fastpath: Admin Console: System > Settings > Email Server , then Outgoing**

---

The main part of configuring outgoing email settings involves the settings for the Simple Mail Transfer Protocol (SMTP) server that outgoing email will use.

- The **Mail Host** and **Server Port** should correspond to your email server. A host name may look like this: `smtp.example.com`. If your outgoing email server requires a port number, enter it here.
- Turn on **Mail Debugging** if you want to have messages from the outgoing server written to the application log. These can be useful if you suspect there's a problem with outgoing email. For more information on viewing logs, see [Using application logs](#) on page 434.

---

**Note:** You should not leave mail debugging on a production instance any longer than necessary to debug a problem.

---

- If your SMTP server requires authentication to send email through it, set the **Server Username** and **Server Password**.
- If you want to encrypt the connection between the web app nodes and the SMTP server, select the check boxes to use Secure Sockets Layer (**Use SSL**) or Transport Layer Security (**Use TLS**).

You should set the **Server Admin Email** and **Server Admin Name** to use a default email address and name for outgoing email. In practice, outgoing emails can appear to have been sent by any one of many people, depending on the reason for the message. For example, when someone posts a message to a discussion thread, the email can appear to have come from them and will be received by anyone receiving notifications for the message.

We strongly recommend using a **Bounce Email Address**. This prevents automatic email replies, such as Out of the Office emails, from posting in your community. That is, if an outgoing Jive email bounces because its recipient is no longer available, the returning email is sent to this bounce email address. This is the best way to keep this kind of email from cluttering the inbox of an address that you use for other purposes.

---

**Note:** You should avoid setting the bounce email address to a domain that is the same as the domain for registering users. The bounce email address is placed as the return-sender address in the email header for a message sent out from the system for validation. If the email address of the user attempting validation and the bounce email address have the same domain, spam filters may see this as a spoofing attempt and drop the message.

---

You should select the **Set Username in Notification Email From Address** check box, when you want a person's user name to show in the FROM line of a notification email instead of their full name. With this enabled, if someone posts a discussion reply message, notification messages sent to other people show the FROM line as, for example, "gladysk" rather than "Gladys Kravitz".

## Configuring incoming email

You can enable features through which people can post content to the application by sending email to a particular address. For that, you should set the connection to an incoming email server so the instance can receive email messages from users.

The application can listen for email in order to support replying to or creating content via email. These are two distinct features, and you can enable only one of them.

- The *incoming email monitor* provides support through which users can reply to a discussion by email. It only supports discussion reply posts made by replying to a discussion notification email that a user receives. This feature requires only that you configure the community to retrieve messages sent to a mailbox you specify. For more information, see [Configuring incoming email monitoring](#) on page 174.
- The *advanced incoming email monitor* provides support for replying to notifications for other content types in addition to discussions. It also supports people creating content and posting it via email. This feature involves more configuration work, including setting up email routing so that the community receives the messages intended for it. For more information, see [Configuring advanced incoming email monitoring](#) on page 176.

## Configuring incoming email monitoring

With incoming email monitoring, you support posting replies to discussions via email. The application retrieves email that lands in a mailbox you specify and uses the email's contents to post a discussion reply.

---

**Fastpath:** **Admin Console > System > Settings > Email Server** , then **Incoming**

---

### How it works

To be posted with this feature, replies must be emails that are replies to notification email. Although sent as text in email, the reply content appears in the community as if the recipient had posted it with a web browser. This way, users can post when they're unable to log in to the community but are able to read content through their notifications.

Notification emails sent from the application include a token in the subject line. The token is needed for the application to correlate the incoming email with its reply thread. Users should take care not to alter the token.

Here's how it works.

1. Someone posts a discussion message (either a new thread or a reply to an existing one).
2. The community sends email notifications to those people who have requested them.
3. After reading the content of the post in the notification email, someone replies to the notification email with their response (taking care not to delete the token in the subject line).



4. The email is received by the host described in the incoming email monitor settings.
5. Watching for email received at that location, the application locates the discussion thread to which the reply belongs and posts the reply to the community.

Note that this feature supports only discussion replies — posts of new content and replies to other kinds of content aren't supported. To support those features, use the advanced incoming email feature. For more information, see [Configuring advanced incoming email monitoring](#).

---

**Note:** This feature isn't supported when the notification reply is a digitally signed email.

---

### **Configuring to receive email**

When you configure this feature, start with settings for your incoming email server.

Select **Enable Incoming Email Monitoring** to turn on the reply-by-email feature for discussions.

1. In the Admin Console, go to **System > Settings > Email Server**, then select the **Incoming** tab.
2. Specify the parameters for the email monitoring feature as follows:

Setting	Description
<b>Client Protocol</b>	Protocol (POP3 or IMAP) that clients use to retrieve email from your mail server.
<b>Mail Server Host</b>	Host name, such as <code>imap.example.com</code> .
<b>Mail Server Port</b>	Port number that clients use to reach your server.
<b>Email Account to Monitor</b>	The email account on the incoming mail server that the application should watch for content. For example, <code>monitored_account@mail.yourdomain.com</code> . This email address also serves as the reply-to address if the content is sent out from Jive.
<b>AccountUsername</b>	Email account user name.
<b>Account Password (Optional)</b>	Account password if the server requires one from clients.
<b>Use SSL</b>	The check box that indicates if the server encrypts the connection between the web nodes and the SMTP server with Secure Sockets Layer (SSL).
<b>Mail Folder Name</b>	The server-side folder name (if any) that email lands in when it is received if the client protocol is IMAP.



Setting	Description
<b>Delete Unrecognized Email Messages</b>	The check box that indicates if messages that <i>aren't</i> intended for the application should be removed.
<b>Inbox Check Frequency</b>	The frequency with which the server checks for new email. You should set this to a value that makes sense for your community. For very active communities (particularly when many people author by email), you might want this to be a lower number so that the application is more responsive with emailed posts.

3. Select the **Enable Incoming Email Monitoring** check box to enable the email monitoring feature.
4. Click **Save Changes**.

### Configuring advanced incoming email monitoring

With the advanced incoming email monitor, you can set up the application to support posting most kinds of content via email. This includes posting replies to content as well as adding new content.

This feature overrides the incoming email monitoring feature. When you enable advanced incoming email monitoring, incoming email monitoring is unavailable. The advanced feature includes the functionality of the basic feature (although it works differently).

---

**Fastpath:** **Admin Console: System > Settings > Email Server** , then **Advanced Incoming**

---

### How it works

When posting content via email, a person uses one of a number of email addresses that are specifically designed for posting a particular kind of content in a particular place, such as a space or social group.

Here's how it works.

1. Using a browser, a person goes to the place (such as a space, social group, or their profile) to which they might want to post content.
2. The person clicks the **Create by email** link to display a list of the content types in that place that they can post via email.
3. After selecting check boxes for the content types they want, the person downloads vCards representing each of the content types. They can also email the vCards to themselves.

4. In their email application, the person uses the vCards to add the email addresses to their email address book, where they're available when they want to post via email.
5. To post content, the person creates an email with the content they want to post, then sends the email to the address they downloaded as a vCard.

### Supported content types

Content types supported by this feature include the following (depending on what your license allows):

For replies	For creating new content
Discussion replies	Discussion threads
Document comments	Documents
Blog post comments	Blog posts
Direct messages	Status message updates
Shares	Announcements
	Project tasks (native Jive tasks)
	Video

### Configuring network

With advanced email monitoring feature enabled, the application receives email directly, rather than checking for messages dropped in a particular mailbox. Because of this, configuring this feature requires setting up email routing so that Jive receives emails containing content.

Note that this might require your email server administrator to prepare the system.

You need to configure email servers and route requests on port 25 to the port on which the application is listening. Here are the details:

1. Configure email servers so that messages with content are sent to the community. Here are two likely configurations:

- You've deployed Jive to a server where the DNS A record of the server doesn't have a corresponding MX record.

For example, your community is deployed to `community.example.com`. It's unlikely that an MX record exists for the DNS A record `community.example.com`, so you most likely don't have to add or configure any DNS records. Mail transfer agents first attempt to look up an MX record for `community.example.com`; if they don't find one, they use the "implicit" or "fallback" A record.

- You've deployed Jive to a server where the DNS A record of the server does have a corresponding MX record, and so you've created a separate DNS A record specifically for this email functionality.

For example, your community is deployed to `example.com/community`. DNS A record for `example.com` probably already has a corresponding MX record that handles mail for the employees of `example.com`. To work around this, you need to create a separate DNS A record such as `community.example.com` which points to the same IP address as the server that Jive is deployed on, then (optionally) create an MX record that points to the A record `community.example.com`. If you don't create an MX record, email transfer agents use the A record as a fallback.

2. Open inbound connections to port 25 on the server where Jive is deployed, then use iptables to forward inbound requests on port 25 to the port you specify in the feature's configuration. By default, port 2500 is used.

Ports 1024 and below are considered privileged ports on Unix systems. (You're forwarding requests to another port to avoid running the application as root to access the privileged port, which isn't recommended.) The following is a sample iptables command to forward requests on port 25 to port 2500:

```
iptables -t nat -I PREROUTING -p tcp --dport 25 -j REDIRECT --to-ports 2500
/sbin/iptables-save
```

### ***Configuring to receive email***

After you've set up email routing to ensure that Jive can receive content email, you should configure the application to handle email sent to it.

---

**Fastpath:** Admin Console: **System > Settings > Email Server** , then **Advanced Incoming**

---

To enable and configure the advanced email monitoring feature:

1. In the Admin Console, go to **System > Settings > Email Server** , then select the **Advanced Incoming** tab.
2. Specify the parameters for the advanced email monitoring feature as follows:

Setting	Description
<b>Mail Server Host</b>	The host name, such as <code>example.com</code> . Destination email addresses take a form specific to the content type, such as <code>status@example.com</code> . This is typically the domain used to reach the community via a web browser.
<b>Mail Server Port</b>	The port on which the application should listen for incoming email.

Setting	Description
<b>Valid IPs</b>	The IP addresses from which content email should be accepted. Use this setting to limit the locations — such as relay servers — from which content is allowed. Leave this blank to accept email from any server.
<b>Email address prefix</b>	<p>The value prepended to the reply-to address in the message header. It isn't ordinarily seen by users. The default value is "jive".</p> <p>Ordinarily, it's a good idea to leave this one blank. You might want to enter your own value here if you have multiple community instances and want to use the prefix to disambiguate among emails sent to them. In that case, each instance would have a different prefix.</p>

3. Select the **Enable Advanced Email Tools** check box to enable the advanced email monitoring feature.
4. Click **Save Changes**.

## Disabling email in test environments

In test environments, disabling email prevents the test instance from sending email updates to your users.

Your production instance is typically set up to both send email notifications (SMTP) and access an email account (email monitor) or server (advanced incoming email). For your test instances, we strongly recommend changing these settings; otherwise, you may find that the new test instance generates email notifications that look like they're coming from your production instance. This can be very confusing to users and might end up unnecessarily burdening your email servers.

You can disable mailing for test environments as follows:

- Change all email addresses to a dummy value with:  

```
UPDATE jiveuser SET email = 'dummy@localhost';
```
- Turn off SMTP by changing the SMTP server name to `nomail`.
- Disconnect or reconfigure the email monitor to point to a different mailbox.
- Disconnect or reconfigure the advanced incoming email feature.

Note that if you have customized email templates, they are not overwritten during an upgrade. We recommend testing them after an upgrade to ensure your customizations have been maintained.

## Configuring email digests

You can customize your digest email settings for your community.

---

**Fastpath:** Admin Console: System > Management > System Properties

---

To configure email digests, you edit the following system properties in the Admin Console.

System property	Description	Example
<code>jive.digest.enabled</code>	Turns the weekly digest email feature on or off.	<code>true</code>
<code>jive.digest.emailDay</code>	The day of the week that weekly digest emails are sent. Sunday is set as the first week day.	5 (for Thursday) 1 (for Sunday)
<code>jive.digest.emailHour</code>	The hour of the day that weekly digest emails are sent.	9
<code>jive.digest.batchSize</code>	The number of weekly digest emails processed at a time.	500
<code>jive.digest.pause</code>	The amount of pause time after a batch of weekly digest emails is processed, in milliseconds	5000

## Editing email notification templates

Jive includes a set of email templates for emails it sends to users in response to certain events. You may want to edit the default email notification templates to perform content changes or to include password reset notifications.

---

**Fastpath:** Admin Console: System > Settings > Message Templates

---

**Caution:** While you can edit any of the application's email templates, and we encourage you to edit the header and footer email templates, we otherwise recommend that you limit changes to email templates because such customizations increase your upgrade tasks.

---

The templates cover a wide range of actions in the application. Some of these are very common, such as email notifications when content is changed or added (for example, for blogs, documents, and spaces) or when someone requests a password reset. Others are sent for actions or events that are more rare. You can find a complete list of templates in the Admin Console. You can customize the header and footer of outbound emails. Also, you can add new templates in locales that are not available by default. For information about changing template language and locale, see [Localizing email notification templates](#) on page 184.

---

**Note:** You configure other specific aspects of email in other parts of the Admin Console. For example, you set whether moderation email should be sent on the Discussions settings pages.

---

Email messages sent by Jive can be sent as plain text or HTML. Each template includes a plain text version and an HTML version.

## Placeholder tokens

When you're editing templates, use the syntax of Apache FreeMarker. Each template supports a specific set of placeholder tokens for email content that vary from message to message. For example, the notification email sent to users following a document includes tokens for the followed document, the following user, and the URL of the followed document. In the template text, refer to tokens by using FreeMarker syntax, such as `${document}`, `${user}`, or `${docURL}`.

As you edit the template, click **Preview** to see your work.

## Template examples

Here are examples designed to tell a user that an item they're following has been updated. This template begins by telling the recipient the name of the user who created or modified the item. It then provides the title of the item ("subject"). The template then checks to see if the system is configured to support other features related to content, and may display one or all of the following messages to the recipient:

- If the system allows commenting on the item by replying to the notification email.
- If the system supports updating the item by sending a new version via email.
- If the system supports creating new content via mail.

### Plain text template example

```
${contentAuthorName} <#if contentAuthorURL?has_content>[${contentAuthorURL}]</#if>
<#if isNewContentItem?? && isNewContentItem>created<#else>modified</#if> the
document:
```

```
"${contentSubject}"
```

```
To view the document, visit: ${contentURL}
```

```
<#if includePostContentInEmail && !docVerseDocument && !binaryDocument>
```

```
-----
${contentTextBody}
-----
```

```
</#if>
```

```
<#if emailReplyEnabled>
```

```
<#if docVerseDocument && docVerseEnabled>
```

```
By replying to this email, you can take action on this document.  If you attach a
new version as a file to the email,
a new version of the document will be created.  The body of the reply, if any,
will be treated as a comment.
Comment by replying to this email -or- go to the document on
${SkinUtils.getCommunityName()}
[${contentURL}]
<#else>
Comment by replying to this email -or- go to the document on
${SkinUtils.getCommunityName()}
[${contentURL}]
</#if>
<#elseif hasRespondEntitlement>
Comment by going to ${SkinUtils.getCommunityName()}
[${contentURL}]
</#if>

<#if emailCreateEnabled>
Create a new document in ${containerName} by email
[${newContentAddress}] -or- at ${SkinUtils.getCommunityName()}
[${newContentURL}]
<#elseif hasCreateEntitlement>
Create a new document in ${containerName} at ${SkinUtils.getCommunityName()}
[${newContentURL}]
</#if>
```

## HTML template example

```
<h3 style="margin: 10px 0 5px; font-size: 17px; font-weight: normal;">
  ${contentSubject}
</h3>
<span style="margin-bottom: 10px;">
  <#if isNewContentItem?? && isNewContentItem>created by<#else>modified by</#if>
  <#if contentAuthorURL?has_content><a
href="${contentAuthorURL}">${contentAuthorName}</a><#else>${contentAuthorName}</#if>
  in <i>${containerName}</i> - <a href="${contentURL}">View the full document</a>
</span>
<hr style="margin: 20px 0; border: none; background-color: #dadada; height: 1px;">

<#if includePostContentInEmail && !docVerseDocument && !binaryDocument>
${contentBody}
</#if>

<div style="background-color: #f4f4f4; padding: 10px; margin-top: 20px;">
<#if emailReplyEnabled>
<#if docVerseDocument && docVerseEnabled>
  <p style="margin: 0;">By replying to this email, you can take action on this
document.  If you attach a new version as a file to the email,
a new version of the document will be created.  The body of the reply, if any,
will be treated as a comment.</p>
<#else>
  <p style="margin: 0;">Comment by replying to this email -or- <a
href="${contentURL}">go to the document on ${SkinUtils.getCommunityName()}</a></p>
</#if>
<#elseif hasRespondEntitlement>
  <p style="margin: 0;">Comment by <a href="${contentURL}">going to
${SkinUtils.getCommunityName()}</a></p>
</#if>

<#if emailCreateEnabled>
  <p style="margin: 0;">Create a new document in ${containerName} by <a
href="mailto:${newContentAddress}">email</a> -or- at <a
href="${newContentURL}">${SkinUtils.getCommunityName()}</a></p>
<#elseif hasCreateEntitlement>
  <p style="margin: 0;">Create a new document in ${containerName} at <a
href="${newContentURL}">${SkinUtils.getCommunityName()}</a></p>
</#if>
</div>
```

## Password information in email templates

The User Creation Welcome Email template supports including the `${password}` token while it is being defined. However, through this setup, the user passwords are sent embedded as simple text in the email body, leaving its security at risk. As a secure practice, we recommend that you use links for password reset instead of sending the passwords directly in the welcome email.

You can use the following markup in your email templates to add links to password reset:

- In plain text:

```
<#if jiveURL?has_content>
Someone created your account on your behalf. If you did not receive a password
from that person,
you'll need to click on "I forgot my password" or go to reset your password
at ${instanceURL}emailPasswordToken!input.jspa
<#else>
Someone created your account on your behalf. If you did not receive a password
from that person,
you'll need to click on "I forgot my password"
</#if>
username: ${newUserUsername}
```

- In HTML:

```
<p>
<#if jiveURL?has_content>
Someone created your account on your behalf. If you did not receive a password
from that person,
you'll need to click on "I forgot my password" or go to reset your password
at <a
href='${instanceURL}emailPasswordToken!input.jspa'>${instanceURL}emailPasswordToken!input
to update your password.<br>
<#else>
Someone created your account on your behalf. If you did not receive a password
from that person,
you'll need to click on "I forgot my password"<br>
</#if>
<br>
username: ${newUserUsername}
</p>
```

## Adding unsubscribe link to email footers

By editing the email footer template, you can let users unsubscribe from email notifications directly from the email notifications they receive.

---

**Fastpath: Admin Console: System > Settings > Message Templates**

---

The unsubscribe link is disabled in the email notification footer by default.

To enable the unsubscribe link in all email notification footers:

1. Click the edit icon for the **Email Footer** template.
2. Select **Yes** for **Give users the option to automatically unsubscribe to all emails from this community** to enable the option.



---

**Note:** If you select **No**, you still can see code and text that refer to the unsubscribe link, but they do not show up in the output.

---

3. Click **Save Changes**.

## Localizing email notification templates

You can set the email templates for additional languages so that users receive auto-generated emails in their language.

---

**Fastpath:** **Admin Console: System > Settings > Message Templates**

---

When you create email templates with the locale specified as part of the file name, Jive automatically shows the localized email content when the user's language and country selection match the specified locale. Note that for languages other than English, you may need to provide several versions of the template to cover all cases where the user sets both the language and the locale within Jive. Users who set a locale that doesn't precisely match the locale specified in the UI see the English template by default.

For example, if you provide only a translated `mail_template_fr.xml`, only users who set their language to French in their Preferences but don't specify a locale see the translated information. Users who specify French as the language and also specify either France or another place as the locale see the English version. To ensure users who specify French as the language and France as the locale see French-language content, create a second copy of the template called `mail_template_fr_FR.xml`. To also show French to users who specify Belgium as the locale, provide a third template called `mail_template_fr_BE.xml`.

## Spam prevention

You can use a variety of best practices to avoid spam in your community. Here are some general spam prevention strategies, as well as those that target specific spammers.

Community administrators of externally-facing communities should develop a strategy for dealing with spam. (Internally-facing communities do not typically experience spam.) Here you can find general spam-prevention methods, as well as methods for targeting specific spammers. You can choose the methods that should work best for your community. For more information, see [Basic spam prevention](#).

In addition to these out-of-the-box features, if you are managing an externally-facing community, you may want to enable the advanced spam prevention service. For more information, see [Advanced spam prevention](#).

For more information about spam prevention, refer to [Best Practices for Spam Management](#) on . Note that you must be a registered user to see this document.

## Basic spam prevention

You can use a variety of best practices to avoid spam in your community. Here are some general spam prevention strategies, as well as those that target specific spammers.

### *General spam prevention methods*

You can employ a variety of methods for preventing spam.

## Moderating new user registrations

You can assign moderators to approve or reject new user registrations. Note that this is possible if your community is not using SAML.

For more information, see [Setting up user registration moderation](#) on page 428.

## Enabling Captcha for new user registrations

You can require that users type in a Captcha image when they register for the community. For more information, see [Configuring self-service user registration](#) on page 138.

## Requesting email validation

You can require that the application send an email to the address a new user provides at registration. The user must then use a link in the email to complete registration. For more information, see [Configuring self-service user registration](#) on page 138.

## Restricting email domains

You can restrict the domains from which email registrations can be accepted. For this, you modify the following parameters:

- Set `registration.domainRestriction.enabled` to `true`
- List the allowed domains, separated by commas in `registration.domainRestriction.domains`
- Specify your company name in `registration.domainRestriction.company`

You can modify these parameters in the Admin Console, **System > Management > System Properties**.

## Enabling Captcha at user login

You can require that users type in a Captcha image when they log in to the community. For more information, see [Configuring login settings](#) on page 142.

## Limiting permissions for guest users

You can disable the ability of guests to create content by limiting the permissions of Everyone to view-only (guests are members of Everyone social group). And you can give only registered users (All Registered Users social group) the ability to create content. For more information, see [Managing permissions](#) on page 371.

## Enabling Akismet for blog comments

You can use Akismet service to help prevent blog comment spam. For more information, see [Configuring blogs system-wide](#) on page 94.

## Configuring keyword and message governor interceptors

You can limit the frequency of posts and search for spam keywords. For more information, see [Interceptors overview](#) on page 121.

## Enabling abuse reporting

You can allow users to report abusive content by clicking an abuse label on the content, which is then sent to a moderator. For more information, see [Setting up abuse reporting](#) on page 358.

## Enabling content moderation

You can enable content moderation so that users must submit content for approval before it's published in the community. For more information, see [Setting up content moderation](#) on page 425.

## Enabling link moderation

You can require moderation of content that contains external URLs that are not whitelisted. You can also configure link moderation so that all content by users who do not have a certain amount of status points is automatically moderated.

You can enable link moderation in the Admin Console, **System > Moderation > Configure Spam Link Prevention** .

### *Targeting specific spammers*

You can block specific users by their login or by IP.

## Banning users

You can ban malicious users by blocking their login credentials or their IP address. For more information, see [Configuring banning](#) on page 149.

## Ban IP addresses

You can ban one or more or a range of IP addresses. For more information, see [Configuring banning](#) on page 149.

## Advanced spam prevention

If your community needs additional spam prevention features, you can check out these extra levels of support.

For more information about these services, see [Spam prevention service and 3rd party integration: mollom offering](#) on .

---

**Fastpath: Admin Console: System > Moderation > Spam Prevention Service**

---

## Using Spam Prevention service

This service has more functionality than the basic spam prevention measures. Specifically, this service implements moderation rules developed by analyzing spam attacks across the Jive customer base to provide the most up-to-date spam detection methods.

The Spam Prevention Service is a free service.

## Using Spam Prevention service with third-party integration

This service relies on sophisticated machine learning techniques to block spam and malicious content automatically. The integration uses a reputation-based system that keeps a continually evolving archive of user profiles to immediately determine a user's potential to create spam. This applies to everything from user registration forms to blog entries.

This is a monthly, fee-based service.

## Troubleshooting email

Use these techniques to troubleshoot email issues.

If you don't see your particular issue listed here, you may want to check out [FAQ: Configuring and Troubleshooting Email Integration](#) on Worx.

## Appended email content being included

You may notice that Jive includes content appended to your emails, such as confidentiality notices or signatures. You can set Jive to ignore this content by adding five hyphens or underscores ("-----" or "\_\_\_\_\_") to the beginning of the appended content template in your email application. Jive excludes anything following five hyphens or underscores.

## Automated reply emails causing stream pollution

If a user sets up an automated reply, such as an Out of the Office response, in their email client, your community may experience a wave of email content generated by these automated replies.

We strongly recommend using a Bounce Email Address. You can set this in the Admin Console at **System > Settings > Email Server**. Automatic email replies are sent to the Bounce Email Address. For more information, see [Configuring outgoing \(SMTP\) email](#) on page 172.

## Email digests

By default, email digests are sent at 9:00 AM PST on Thursdays. Users can select in their Preferences to receive emails daily, semi-weekly, weekly, or never; the default is weekly. Users receive the digest email at the configured time in their timezone. If a user has not explicitly set timezone in their Preferences, the application server's timezone is used.

Out of Memory Errors can occur when the email manager has an unlimited in-memory queue of email messages. Under normal conditions, the application does not generate enough emails fast enough to encounter this situation. However, in large communities, email can be generated so quickly that creating a digest of all of them can overwhelm the application's email manager. The ideal solution is to make the email manager's queue persistent so that it can handle any number of messages without storing them all in memory. To avoid this problem, you can adjust the `jive.digest.batchSize` system property to include a smaller number of email messages.

## Users are not getting stream notifications via email

In this case, check the following:

- Have users correctly configured their email notifications? For more information, see [Choosing between email and stream notifications](#) in the User Guide.
- Does at least one server in the cluster think it is the senior cluster member? The senior member is the node that starts up first in the cluster. For more information, see [Clustering in Jive](#).
- Are emails actually being sent from the instance? To find out, check the destination SMTP server logs by turning on mail debugging on **System > Settings > Email Server** so that logs are written. For more details, see [Configuring outgoing \(SMTP\) email](#) on page 172.
- Send a test email to see if the SMTP server connection is working and that your outbound emails are not getting marked as spam somewhere upstream. You can do this in the Admin Console at **System > Settings > Email Server** by using the **Send Test Email** button.

## Setting up Activity Engine

The Activity Engine powers the activity tracking functionality and is an integral part of the Jive Genius feature. This section describes how to configure and troubleshoot the Activity Engine, and provides an overview of the upgrade process from a previous version of Jive.

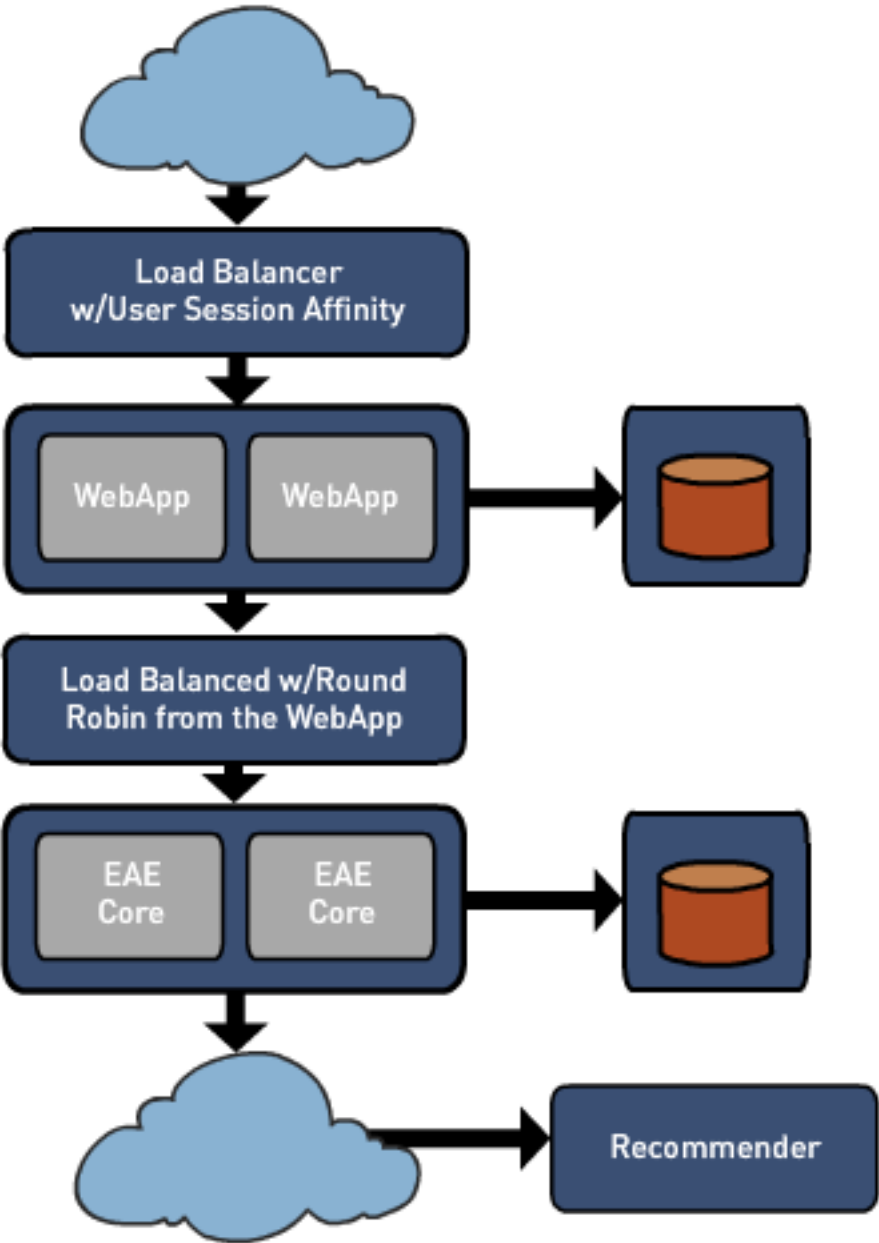
### What is Activity Engine?

The Activity Engine powers the stream functionality in Jive.

In addition, the Activity Engine facilitates communication between the Jive web application nodes and the Jive Genius SaaS service, which identifies and recommends additional relevant conversations and connections for community users.

The Activity Engine is a required component for both on-premise and hosted customers. For on-premise customers, the Activity Engine includes a node and an associated database in typical configurations.

- For Activity Engine hardware requirements, see [Hardware requirements](#).
- For Activity Engine sizing recommendations, see [Deployment sizing and capacity planning](#).



## Upgrading and Activity Engine

After you have upgraded from a previous version of Jive, the Activity Engine automatically runs its own upgrade, synthesizing content to deliver to activity streams.

---

**Fastpath:** Admin Console: System > Management > Activity Upgrade Status  
, Admin Console: System > Management > Logging Management

---

This content synthesis occurs only once after an upgrade. You can monitor the progress of the Activity Engine upgrade on the **Activity Upgrade Status** page. During the upgrade, you can see a progress bar showing the progress of the upgrade. After the upgrade is finished and successful, a message tells you that all activity has been sent to the Activity Engine for processing. Immediately after that, your activity streams should show active content.

During the Activity Engine upgrade, the progress bar updates every 3-5 seconds. In the rare event that the upgrade hangs (and the progress bar stalls), you should go to the **Logging Management** page in the Admin Console to try to debug the issue. In the **Log Viewer**, search for error messages containing `com.jivesoftware.community.eae.upgrade`. Fix the problem and restart the upgrade with the `eae-service restart` command. For more troubleshooting tips, see [Troubleshooting Activity Engine and activity streams](#) on page 193.

## Configuring Activity Engine

Configure the Activity Engine includes installing the Jive package on the Activity Engine node and configuring the basic settings that control Jive connection to the Activity Engine's core.

---

**Fastpath:** Admin Console: System > Settings > Activity Engine

---

To configure the Activity Engine, you first install the Jive package on the Activity Engine node as described in [Installing Jive package and starting up](#). You can then configure the basic settings that control Jive's connection to the Activity Engine's core processes on the Activity Engine page. For the lists of the additional settings that you can adjust on the Activity Engine, refer to [Activity Engine properties reference](#) on page 191.

## Deploying multiple Activity Engines

You can deploy multiple Activity Engine cores if a single Activity Engine core is not enough to handle your volume of traffic. Do this by setting up the new Activity Engine core with the same settings as the first Activity Engine core, and adding the new address to the Activity Engine configuration in the Admin Console.



## Queue depth settings

The queue depths displayed on the Activity Engine page of the Admin Console show the number of items awaiting processing by the Activity Engine node. When an activity is sent to the Activity Engine, the activity is queued and processed as quickly as possible. Each queue, or group of queues, serves a specific purpose:

- **Command:** Used when specific tasks need to be scheduled and run on the Activity Engine node, such as a user rebuild or Recommender refreshed.
- **Processing:** Activities sent from the application to the Activity Engine are immediately queued on the processing queue. This writes the activity to the non-user specific streams (All Stream, Profile Stream, Place Stream) and enqueues to the UserStream.
- **UserRebuild:** When a user rebuild task is running, this queue fills with activities that need to be processed to rebuild the user's stream.
- **Upgrade:** During the upgrade from a previous Jive version to 5.0, the upgrade queue fills up with activities that need to be processed, so that old content is displayed in the new stream format.
- **UserStream:** Activities sent from the application to the Activity Engine are enqueued on the User Stream queue after being processed by the processing queue. The processing queue builds up all the information necessary to write the activity to individual user streams or communication streams that might be following the content or person on the activity.
- **Shredder:** If Jive Genius is enabled, this queue fills up with items as activity comes in and needs to be shredded before being sent to Jive Genius.
- **Recommender:** If Jive Genius is enabled, this queue fills up with requests for recommendations bound for Jive Genius.

## Expiration settings

The expiration settings control the number of days an activity remains in a given stream.

---

**Caution:** Do not adjust these settings without guidance from [Support](#). Doing so can lead to serious performance problems or data loss.

---

## Activity Engine properties reference

Here you can find Jive system properties that are relevant for Activity Engine.

To set any of these properties, use the **System Properties** page in the Admin Console. Alternatively, as the jive user, run the following:

```
jive set <property> <newvalue>
```



## Activity Engine properties

Property	Description	Default value
<code>eae.core.coreAddress</code>	Address of the Activity Engine server.	<code>localhost</code>
<code>eae.core.corePort</code>	Port of the Activity Engine server.	<code>7020</code>
<code>eae.core.coreMinWorkerThreads</code>	Minimum number of threads to listen for incoming socket connections from the Jive web application.	<code>4</code>
<code>eae.core.coreMaxWorkerThreads</code>	Maximum number of threads to listen for incoming socket connections from the Jive web application.	<code>2048</code>
<code>eae.core.user-recency-enabled</code>	Controls whether or not only active users have their streams populated.	<code>true</code>
<code>eae.core.user-recency-timeout</code>	The age in milliseconds after which a user is considered inactive.	<code>2592000000</code> (30 days)
<code>eae.core.user-recency-buffer</code>	Update user recency time no more than once in this time period, in milliseconds.	<code>86400000</code> (1 day)
<code>eae.core.remove-old-entries-time-after-midnight</code>	Determines when to allow the tasks that remove old items from the stream to run (after midnight, in milliseconds). For example, a value of <code>7200000</code> allows the tasks after 2 A.M. If you want the tasks to run on a set interval (not just during a time window), set this to 0 and set <code>remove-old-entries-buffer</code> to 24 hours ( <code>86400000</code> milliseconds).	<code>7200000</code>
<code>eae.core.remove-old-entries-period</code>	The window following <code>remove-old-entries-time-after-midnight</code> , in milliseconds, in which the old item deletion tasks runs, OR how often to run the tasks, in milliseconds, if <code>remove-old-entries-buffer</code> is set to 24 hours. For example, the default values allow the tasks to run once between 2 A.M. and 3 A.M.	<code>3600000</code>
<code>eae.core.remove-old-entries-buffer</code>	Extra buffer time to allow the old item deletion tasks sufficient time to run. If you want the tasks to run on a set interval (not just during a time window) set this to 24 hours ( <code>86400000</code> milliseconds) and set <code>remove-old-entries-time-after-midnight</code> to 0, then set <code>remove-old-entries-period</code> to the desired interval.	<code>600000</code>

---

Property	Description	Default value
<code>eae.core.log-monitor-directory</code>	The path (absolute or relative to service configuration directory) where performance monitoring logs are saved.	<code>var/monitoring</code>
<code>eae.core.log-monitor-period</code>	The frequency, in milliseconds, that samples are written to the monitoring logs.	<code>60000</code>

## Troubleshooting Activity Engine and activity streams

Here you find the common problems with the Activity Engine and activity streams and ways to resolve them.

---

**Fastpath:** Admin Console: System > Settings > Activity Engine

---

## File handle limits exceeded

If your Activity Engine has exceeded its open file handle limits, you may see output like the following:

```
2013-06-27 04:10:25,894 [pool-7-thread-9] INFO
[67073a51-1525-4ca9-80d0-382b2ae58899]
com.jivesoftware.eae.service.dao.impl.StreamConfigurationDAOImpl - Added missing
stream source connections for user User{userId=43415}
java.io.IOException: Map failed
    at sun.nio.ch.FileChannelImpl.map(FileChannelImpl.java:748)
    at com.jivesoftware.eae.stream.kvindex.KeyIndexer.mmap(KeyIndexer.java:238)
    at com.jivesoftware.eae.stream.kvindex.KeyIndexer.index(KeyIndexer.java:216)
    at com.jivesoftware.eae.stream.kvindex.KeyIndexer.get(KeyIndexer.java:165)
    at
com.jivesoftware.eae.stream.kvindex.RevolvingKeyIndexer$Door.get(RevolvingKeyIndexer.java:
    at
com.jivesoftware.eae.stream.kvindex.RevolvingKeyIndexer.get(RevolvingKeyIndexer.java:147)
    at
com.jivesoftware.eae.stream.lucene.LuceneFilteredStreamService.handle(LuceneFilteredStream
    at
com.jivesoftware.eae.service.dao.impl.StreamsServiceDAOImpl.dispatch(StreamsServiceDAOImpl
    at
com.jivesoftware.eae.service.impl.ExclusionManager.trackObject(ExclusionManager.java:218)
    at
com.jivesoftware.eae.service.processing.activity.ExclusionHandler.handleActivity(Exclusion
    at
com.jivesoftware.eae.service.processing.activity.ExclusionHandler.handleActivity(Exclusion
    at
com.jivesoftware.eae.service.queue.AbstractPipelineProcessor.handlePipeline(AbstractPipeli
    at
com.jivesoftware.eae.service.queue.AbstractPipelineProcessor.process(AbstractPipelineProce
    at
com.jivesoftware.eae.service.queue.PhasedQueueConsumerRunnable.run(PhasedQueueConsumerRunn
    at java.lang.Thread.run(Thread.java:662)
Caused by: java.lang.OutOfMemoryError: Map failed
    at sun.nio.ch.FileChannelImpl.map0(Native Method)
    at sun.nio.ch.FileChannelImpl.map(FileChannelImpl.java:745)
    ... 14 more
```

In this case, you need to increase the soft and hard file handle limits as follows:

1. Edit `/etc/security/limits.conf` as follows (note that your file may use the "\*" wildcard to specify all users instead of the "jive" user as shown here — either way, the fix is the same):

```
jive    soft    nofile    200000
jive    hard    nofile    200000
```

2. Verify that the new settings have taken effect:

```
$ su jive -c "ulimit -n"
```

3. Edit `/etc/sysctl.conf` to increase the `vm.max_map_count`. It should look like this:

```
vm.max_map_count = 500000
```

For most large implementations 500,000 is a good value, but some installations require a higher value depending on usage patterns or overall usage.

#### 4. Reload:

```
$ sysctl -p
```

#### 5. Verify that the new settings have taken effect:

```
$ sysctl vm.max_map_count
```

### What matters streams not working properly

If a stream is not working properly, it may be due to one of the following. Note that on the **Activity Engine** page, servers shown in yellow are down.

---

**Fastpath: Admin Console: System > Settings > Activity Engine**

---

- The Jive web application node may not be able to connect to the Activity Engine server. Test the connection by clicking **Test Connection**. If this test is successful, the Activity Engine server can properly process activity. If this test fails, you'll see a failure message describing the problem. Typically, test failures are caused by the Activity Engine database being down or unavailable. Note that your instance of Jive may not allow you access to the Activity Engine's core server. You need to troubleshoot to bring the Activity Engine back online before running another test.
- The Activity Engine server may not be able to connect to its database. Verify that the Activity Engine database has been created and you can connect to it.
- The Activity Engine server may not be able to connect to the Jive Genius Recommender. Try pinging the Recommender from the Activity Engine.

If you have fixed and verified these connections but continue to experience problems, you should make sure that all of the configuration settings are correct.

### Long delays Between post and stream publication times

---

**Fastpath: Admin Console: System > Settings > Activity Engine**

---

If there are long delays between post and stream publication times:

- Try sending a trace through the Activity Engine by clicking **Send Connectivity Trace** on the **Activity Engine** page. This sends a blank activity through the Activity Engine processing pipelines and then reports the length of time it took to complete the trip. If you send the trace and get back a valid time measurement, the Activity Engine node is up and functioning properly. Typical return times on an idle system would be a few seconds.
- Make sure that the web nodes and the Activity Engine nodes are configured to use NTP and share very similar, if not identical, times. If they are out of sync, you may see delays.

## Log files related to the Activity Engine

---

**Fastpath: Admin Console: System > Management > Logging Management**

---

For further troubleshooting, look at the error messages in the application logs under **Logging Management > Log Viewer**, or view the application log directly in `/usr/local/jive/services/eae-service/var/logs` on the Activity Engine node.

- `eae-service.log`: This is the output of all log statements in the Activity Engine server. Server errors are logged here.
- `eae-service.out`: This holds anything written to the standard output stream from the Activity Engine server. Initialization and out-of-memory errors are likely logged here.
- `eae-service-gc.log`: Analyze this log to determine garbage collection effectiveness and performance.

## Understanding Recommender Service

The Jive Genius Recommender Service, the first in the Jive Genius family of social intelligence products, provides powerful tools for suggesting content, people, and places to your community users. This section describes how the Recommender Service works.

### What is Recommender Service?

Here you can find an overview of the Jive Genius Recommender Service.

The Recommender Service is an engine that collects and analyzes user activity in the community to recommend useful content, people, and places to individual users, and reports trending content and people. The Recommender looks at business relationships, user expertise, and areas of interest based on a user's behavior in the community to suggest relevant content that Jive knows a user has not yet seen. The more users interact on the community, the better their results become in the Recommended for You widget.

When you enable the Recommender Service, all of the following features are present in your community. Note that you cannot choose for some of these features to be visible, but not others.

- Recommended for You widget
- Trending Content widget
- Trending People widget
- Your Trending and Popular Content results listed on the Activity tab of a user's profile

The Recommender Service obeys all content permissions and will not recommend content that a user doesn't have permission to view. Therefore, users may not see the same Trending Content or Trending People, depending on their content viewing permissions, when they logged in, and when the last Recommender content poll occurred. Recommended for You is dynamic. Its recommendations change based on a user's shifting interests and affinities. The Recommender even responds to changes in the org chart.

For more information about the architecture of the Recommender Service and its relationship to the Activity Engine, see [What is the Activity Engine?](#).

## Trending Content and Trending People

The Recommender analyzes content and people over a period of time and uses that data to display the Trending People and Trending Content in the system. The Recommender counts the things users do (such as create content, follow people, and join groups) and, importantly, how users interact with each other's contributions. For example, users liking another user's content, marking answers helpful or correct, and viewing content all count toward the trending status of a user or a piece of content. The Recommender weights the various counts in its equations and creates a list of users and content with the highest trending counts over a given time period. Trending People recognizes and rewards users who are a positive influence on the community.

This information is passed to the Trending Content and Trending People widgets. They are updated every 15 minutes and display 10 entries by default. These settings are not configurable.

Trending Content and Trending People are based on global algorithms; they are not user-specific. However, users may not see the same trending people or content based on their viewing permissions. For example, if a user does not have permission to see trending content items 1-10, they instead see items 11-20 if they have the correct viewing permissions for those items. The Trending People often are the same for all community users, but it can be different depending on when users logged in and when the last Recommender content poll occurred. Besides, a person may be trending because of something they are doing in a secret group. In that case, you would not be able to see why the person is trending by looking at their recent activity.

For all new users, the Recommended for You widget displays a short notice explaining that Jive Genius is working on creating their recommendations. If you are upgrading from a previous version, the Recommender engine processes all existing connections, follows, and other activities of users. This allows it to capture previous activity (default is 30 days before the upgrade), which it then uses to make recommendations.

The number of likes displayed on a discussion listed in Trending Content is the total number of likes on that discussion *plus* the total number of likes of all the replies to the discussion.

# Recommender Service security and privacy

Here you can find an overview of the Jive Genius Recommender Service security and privacy.

If you have enabled the Recommender Service (it is enabled by default), your Jive instance periodically collects information about users' behavior and send it to the service hosted in Jive Software's data center. This service is delivered from a secure data center in the United States. The Recommender Service relies on state-of-the-art security technology, including a multi-stage encryption process that uses a powerful AES-256 encryption algorithm, to ensure your data is secure and private. Your instance locally encrypts your data into tokens using your unique customer key. This key is available only on your instance. Therefore, it is impossible for the Recommender Service to decrypt any of your data. The Recommender Service processes only data from keyword counts, content types, and user and content relationships.

Before any data is submitted to the Recommender Service, all textual data (subject and content) is processed for efficiency and security. First, keywords for the content in your instance are calculated locally and then encrypted with a unique key stored locally and known only to your instance. Then, your local instance collects activity data about how users have interacted with content, people, and places within your community. The activity data and keywords are then further encrypted and transmitted to the Recommender Service over a secure SSL channel.

The Recommender Service determines that multiple people are interested in the same encrypted keyword without knowing the true value of the keyword. The Recommender never processes the actual textual content from your instance; it processes encrypted data. In addition, the data sent to the service cannot be reversed in the Recommender. This allows the Recommender to provide social intelligence about what users find interesting without requiring access to your sensitive business data. Results are then returned to your instance, decrypted locally as necessary, and delivered to your community users.

## Recommender Service encryption example

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**Caution:** Jive Software will never request that you share with us your cryptographic keys.

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Here is an example of how the encryption process works. A document with the body "The quick brown fox caught a brown duck" would decompose into a term histogram consisting of:

Term	Count
quick	1
brown	2
fox	1



Term	Count
caught	1
duck	1

Before the histogram is submitted to the Recommender Service, the Activity Engine performs a symmetric encryption of each term for a given activity. Note that not all activity has terms and not all terms are preserved in this process. After encryption and term extraction, the data above would appear similar to this:

Term	Count
f8245fe13f2c4b6ca67008f40e73db44	1
bc02301ef10e49dfaeb54b29524cd2-bd3	1
c6c93f55cd1844e88aa8b671cd8fa4d3	1
c02d9cc6a07b406d84cc-b1a44b2f60d6	1

In this case, the word `quick` has been encrypted (using AES-256) into the raw binary sequence `f8245fe13f2c4b6ca67008f40e73db44`. After encryption, only the Activity Engine that created the encrypted data has the cryptographic material necessary to unencrypt the data. This encrypted token is then hashed using JenkinsHash, which turns `f8245fe13f2c4b6ca67008f40e73db44` into a 64-bit number. At no point does the Recommender know how to convert the 64-bit number back into `f8245fe13f2c4b6ca67008f40e73db44`, nor can it convert `f8245fe13f2c4b6ca67008f40e73db44` back into `quick`.

## Configuring Recommender Service

You can enable or disable the Jive Genius Recommender feature. You cannot choose to send specific types of activities and not others.

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**Fastpath: Admin Console: System > Settings > Activity Engine**

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The Jive Genius functionality was introduced in Jive 5.0 and is a core feature of the platform. You can enable or disable the Recommender Service. But you cannot choose to send specific types of activities and not others. Disabling the Recommender Service may be useful for communities with extreme security concerns, such as government entities, that do not want even encrypted behavioral information sent to and analyzed by Jive Software's Recommender Service. For more information about security, see [Recommender Service security and privacy](#) on page 198.

By default, this service is enabled.

### Prerequisites

The Jive Genius Recommender depends on a successful connection to the Jive-hosted Recommender service that's established during installation. For more information about prerequisites and best practices for connecting, see [Preparing to connect to Jive Hosted services](#).



## Disabling the Recommender Service

If you disable the Recommender Service, your users are not able to see the Recommended for You widget, the Jive Genius Browse recommendations, or their Trending and Popular content results on the Activity tab of their profile. They will still be able to see the Trending People and Trending Content widgets, but the results displayed there will be based on a basic popularity algorithm (stored locally) that measures activity over the last seven days. Trending People and Trending Content will not poll or update without a manual browser refresh.

To disable the Jive Genius Recommender Service:

1. In the Admin Console, go to **System > Settings > Activity Engine**.
2. Under **Enable Recommender service**, select **Disabled**.

## Enabling the Recommender Service

To enable the Jive Genius Recommender Service:

1. In the Admin Console, go to **System > Settings > Activity Engine**.
2. Under **Enable Recommender service**, select **Enabled**.

For all new users, the Recommended for You widget displays a short notice explaining that Jive Genius is working on creating their recommendations. If you are upgrading from a previous version, the Recommender engine processes all existing connections, follows, and other activities of users. This allows it to capture previous activity (default is 30 days before the upgrade), which it then uses to make recommendations.

## Managing add-ons

Jive lets you use *add-ons* that extend the Jive Platform capabilities to configure Jive. These add-ons can contain apps, tiles, streams, external storage providers, analytics services, and other extension points to Jive.

When you select **Add-ons**, you see all available add-ons.

## What are add-ons and apps?

Add-on services provide a secure way of extending the Jive Platform with third-party integrations. A Jive add-on is an archive file, containing configuration settings and other data, that can be installed into your Jive community.

## What's the difference between add-ons and apps?

Add-ons define the way that Jive Platform extensions are bundled and deployed into the Jive community.

An *app* is a particular type of Jive Platform extension that extends to the Jive UI. For example, the Jive Daily app can be used to access communities from a mobile device. Or Images app can let you search for images on an external site and embed them into content items directly from the text editor.

An *add-on* can contain any number of apps, tiles, streams, templates, external storage frameworks, analytics services, cartridges, and other extension points. It is up to the developer exactly what is bundled within an add-on: some add-ons only contain configuration information and require the Jive server to communicate with a third-party service; other add-ons are standalone and do not depend on a third-party service. For example, with the Box.com Integration add-on Box.com can be used as an external file storage. A community administrator can manually upload an add-on package into the community.

Additionally, add-ons can be installed for an entire community by a community administrator using the Jive Add-ons Registry. Add-ons can either pull data out of the community or bring data in. If you want to know more about apps, add-ons, and how to develop Jive integrations using the latest APIs, please visit the Jive Developer website at [developer.jivesoftware.com](http://developer.jivesoftware.com).

## Types of add-ons

<b>External Storage Providers</b>	These add-ons leverage options outside of Jive for storing and synchronizing binary files uploaded to a Jive place.
<b>API Services</b>	These add-ons bring external data into Jive or share Jive data with third-party integrations using the Jive API service.
<b>Analytics Services</b>	These add-ons generate credentials that allow access to the Jive Data Export API. Provide these credentials to consumers of your analytics data so they can access the export service. These credentials may be revoked at any time.
<b>Other Add-ons</b>	These add-ons are the ones that cannot be placed to one of the previous categories.
<b>Custom add-ons</b>	These add-ons are the custom add-ons you create to bring external systems into Jive by building extensions for them. For instance, you can connect Jive to your bug tracking system or your version control system so that when a user views a place, they get a view of that other system. Not only can a user view information from that other system, but you can provide actions to the user without them ever having to leave Jive.

## Managing add-ons

Extending the functionality of your community with add-ons requires installing, configuring, maintaining, and uninstalling add-ons. You can find the basic tasks for managing add-ons in this section.

### Installing add-ons

By browsing the Add-on Registry for available add-ons, you can find add-ons that you want to have. You can install these add-ons from the Add-on Registry.

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#### Fastpath: User interface: Your avatar > Add-ons

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A user must have at least Manage System permissions to install add-ons.

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**Note:** The Add-ons Registry includes packages that are provided by third-party developers. Jive Software makes no warranty or guarantee about the reliability, performance, quality, or functionality of any third-party software, and any third-party

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packages you install are therefore provided as is. Use of third-party software is subject to their license or support terms, or both.

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To install an add-on:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **Available** to open the **All Add-ons: Available** page.
3. Find the add-on you want and click **Install**.
4. In the **Confirm Install**, decide whether you want to preview this add-on or immediately install it in your community:

Options	Description
<b>Install now</b>	Select this to make the feature available to your entire community.
<b>Preview</b>	Select this to make the feature available to you only. Make this selection if you would like to test this feature before making it available to your community.
	<b>Note:</b> If you choose <b>Preview</b> , we recommend that you create a secret group and test the add-on before making it available to everyone, as described in <a href="#">Letting community use your add-on</a> on page 209.

5. Some add-ons that are using API Services or Storage Providers require further configuration after being installed. If the add-on you just installed needs additional configuration, the **Settings** page opens. Click **Configure Now** to do that.

You can access the **Settings** page from the add-on list.

6. Change the settings for the add-on.
7. Click **Save and Activate** when you finish configuring the add-on.

## Enabling add-ons for external contributors

If you want external contributors to your community to be able to use an add-on, you can let them access particular add-ons.

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### Fastpath: User interface: Your avatar > Add-ons

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The setting to enable external contributor access is only visible if your community has enabled externally accessible groups. All external contributors in your community must be able to access the add-on you enable: you can't restrict access to members of specific groups.

Apps that are bundled in add-ons are displayed in the App Launcher when external contributors click the Apps tab.

To enable an add-on for external contributors:

1. In the user interface, click your avatar in the upper right corner and select **Add-ons**.
2. On the Add-ons tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on you want to grant access to, and then select **Enable for External Contributors**.

You see the Externally Accessible label in the list of Add-ons. To disable again, change the setting back to disable add-ons for external contributors.

## Updating add-ons

By default, add-on updates happen automatically. But if you have suspended automatic updates, you can check your add-ons to see if there are updates that you can download from the Add-on Registry.

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### Fastpath: User interface: Your avatar > Add-ons

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Updates happen automatically, but if you have suspended automatic updates you can use this procedure to check and download an update.

To check for an update to an add-on:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. From the Add-ons tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on that you want to check for updates.
4. Select **Check for Updates**.
5. If the add-on has updates available, click **Update**; otherwise, you see the "This add-on is up-to-date" message, and you can click **Close**.

## Uninstalling add-ons

Most add-ons can be uninstalled if you decide you no longer want them.

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### Fastpath: User interface: Your avatar > Add-ons

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Some add-ons are provided as part of Jive, and you cannot uninstall them. You can always uninstall non-Jive add-ons that you don't want. If we find an add-on is malicious, we may decide to ban it, and we will remove it from your environment as soon as possible.

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**Note:** If you uninstall an add-on from the Add-ons registry because it is malicious, or because it is not working as expected, please inform [Support](#) promptly so we can investigate.

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To uninstall an add-on:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. Select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on you want to uninstall and select **Uninstall**.
4. Select **Uninstall**.

### Reconnecting to add-on services

An add-on may disconnect from the add-on's service, for example, after configuration changes. To continue using the add-on, you have to reconnect to the add-on service, and you have to re-authenticate.

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#### Fastpath: User interface: Your avatar > Add-ons

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Re-establishing add-on's connection to its service initiates an authentication process, even if the authentication has been established previously. Reconnecting to an add-on service requires that you re-authenticate all tiles that are used by this add-on.

To reconnect an add-on to its service:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. From the Add-ons tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on that you want to reconnect to its service and select **Reconnect to Service**.
4. When the dialog opens, click **Reconnect now** if you're okay with the add-on re-establishing its connection to and re-registering with the third-party service.

You will need to reconfigure any tiles receiving updates, so they continue receiving them.

### Understanding add-on alerts

Add-on's alerts are typically triggered when Jive is having trouble communicating with the third-party add-on service. Some of the possible reasons are described in this topic.

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#### Fastpath: User interface: Your avatar > Add-ons

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<b>Registry failure</b>	This alert can occur immediately after you first register Jive with the third-party service if the external service is down or the certificate is failing. It could also occur if you recently changed your <code>jiveURL</code> . You can try to re-register the service. If that doesn't resolve the alert, make sure the certificate and the <code>jiveURL</code> are correct.
<b>Configuration failure</b>	This alert can occur if your configuration information is incorrect. If you recently created or edited your configuration settings, verify

that they are correct. A network-level communication problem could also cause this alert.

### **Service call failure**

This alert can occur when Jive cannot reach the third-party service because the network is down, or because of some other communication issue. Jive tries to sync with the third-party service for seven days; after that, it stops trying and displays this alert. To resolve it, try fixing the underlying issue (typically a communication or configuration issue) and re-enable synchronization with the service.

## **Managing app visibility by using security groups**

Jive let you limit the visibility of an app by using security groups.

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### **Fastpath: User interface: Your avatar > Add-ons**

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You can specify one or more security groups whose users can see a particular app on the Add-ons tab. This functionality is only available for apps you have installed.

To change the visibility of an app:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on containing the desired app and select **Settings**.
4. Click the gear icon in the **App Security** column of the row containing the app you want to manage. The **Manage App Security Groups** dialog appears.
5. If you don't have security groups already specified for this purpose, in the **Admin Console**, create those groups.

After creating security groups, return to **App Security** for this app.

6. Type the first few letters of the name of the security group whose users should see this app. When the correct security group appears in the dropdown list, select it.
7. Repeat the previous step until all security groups are specified.
8. Click **Save Changes**.

Once security groups are associated with an app, only users within those security groups can see the app. The app is not available to other users.

## Managing storage provider add-ons

The External Storage Framework allows you to create connections to any file storage provider, so users can bidirectionally synchronize updates to a place in Jive and a location on the storage provider.

External Storage integrations let you:

- Use your storage provider of choice as the back-end binary storage for documents and attachments uploaded into some or all the places in your community.
- Connect places to folders, sites, or other storage locations on your storage provider.
- Synchronize permissions between Jive and your storage provider.
- Synchronize file versions and updates between Jive and your storage provider.
- Synchronize comments on files between Jive and the storage provider (if comments are available in your storage provider).
- Limit the integration's availability to specific users and permission groups.
- Decide whether the external storage provider should be the default location for storing files within a Jive place.

For more information about the external storage add-ons already available in Jive, see [Using external file storage](#) on page 103.

If you want to integrate your chosen file storage solution with Jive, it's easy to use the External Storage Framework and Jive's APIs to develop a connection to a provider, add it as a Storage Provider, and enable it in your community. Information about what you need to create a storage provider is available at [developers.jivesoftware.com](http://developers.jivesoftware.com) and in the [Developers](#) space on Worx. For more information about creating and uploading an add-on by using the Registry Console, see [Building your own add-ons](#) on page 208.

## Managing API add-ons

API Add-ons bring external data into Jive or share Jive data with third-party integrations using Jive APIs. These add-ons expose tiles, templates, apps, and other Jive extensions.

The API add-ons appear on the **API Services** tab.

### Reviewing active add-on tiles in community

You can use the Add-Ons interface to see which tiles from an add-on are being used in your community and manage access to them place by place.

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#### Fastpath: User interface: Your avatar > Add-ons

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Not only can you look at which tiles are active in your community, but you can also use the Community Authorization option to see which Jive places contain those tiles. You can always use this page to revoke the service's access to a tile.



To see the active tiles:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. From the Add-ons tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on you're interested in and select **Community Authorization**.
4. To revoke a service's access to tiles in a place, click **Revoke Access**. This revokes access to all tiles in one place.
5. If you want to remove a service off from your community, you need to perform this step for every place that has tiles that connect to the same service.

## Managing Analytics add-ons

Analytics add-ons generate credentials that allow access to the Jive Data Export API. Provide these credentials to consumers of your analytics data so they can access the export service. These credentials may be revoked at any time.

The Analytics add-ons appear on the **Analytics Services** tab.

### Generating client IDs and secrets

Creating a client ID and secret lets you access the Data Export API to use community data in a safe and secure way.

To add a new client ID and secret:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **Analytics Services**, and then click **New Client**.
3. Enter the **Client Name**.

Make sure you use a descriptive name that helps you remember the system it's being used for.

4. Click **Generate Client ID & Secret**.

The generated client ID and secret are displayed in the **View Client ID and Secret** dialog box.

5. Copy the values and paste them to where you can find.
6. Click **Done** to close the dialog box.

### Retrieving client ID and secret

You can retrieve the client ID and secret for your add-on if you lose track of it. Note that access to the ID and secret can compromise your add-on's security.

To find an add-ons client ID and secret:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **Analytics Services**.



3. Click the gear icon next to the add-on that you're interested in, and then click **View Client ID and Secret**.
4. In the **Client ID and Secret** dialog box, copy the values and paste them to where you can find.
5. Click **Done** to close the dialog box.

## Revoking access to a service

You can remove the Jive credentials that if you need to prevent tools from accessing the Data Export API.

You can uninstall a client to revoke access to it as a way to control access of your community data. You can always create a new client if you mistakenly revoke access. For more information on creating a new client, see [Generating client IDs and secrets](#) on page 207.

To revoke access to a service:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **Analytics Services**.
3. Click the gear icon next to the add-on that you're interested in, and then select **Uninstall**.
4. In the **Confirm Uninstall** dialog box, click **Uninstall** to confirm uninstalling the client and revoking access to it.

## Managing other add-ons

Some add-ons don't fit into any other category but show up in the All Add-ons category. These add-ons include the add-ons you built yourself as well as any client apps from the Jive Add-ons Registry that don't contain any tiles or templates.

The add-ons that do contain tiles or templates show up in the API Services category.

You can find other add-ons by clicking your avatar in the top right, and selecting **Add-ons** and then select **Add-ons > All Add-ons > Available**.

## Building your own add-ons

If you have an internal or external system that you want to use to share information with Jive, then you might consider building your own add-on.

To get started on building add-ons, you can use the following guidelines:

- Read the Jive Platform Developer Introduction at <https://developer.jivesoftware.com/intro/>.
- Join the Jive Developer Community at <https://community.aurea.com/community/developer>.
- Create your add-on.

- Bundle your add-on package either using the Jive SDK (<https://community.aurea.com/docs/DOC-114053>) or manually (<https://community.aurea.com/docs/DOC-99941>).
- Upload the add-on to your community and make it visible only to yourself to test it out ([Uploading your own add-ons](#) on page 209).
- [Let the community use your add-on](#).
- [Publish your add-on](#) to the Add-ons Registry.
- Whenever you make new updates to your add-on, publish them to the Add-ons Registry, as described in [Pushing updates to Add-ons Registry](#) on page 210.

## Uploading your own add-ons

You can build your own add-ons to leverage systems in Jive. Once you build the add-on, upload it to Jive by using the **Add-ons** page.

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**Fastpath: User interface: Your avatar > Add-ons**

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When you first upload an add-on to your community, we recommend that you first restrict its visibility to yourself and, if necessary, test out your tiles by creating a secret group for them. This strategy reduces the impact on your community and gives you a chance to your add-on without setting up an entirely separate test environment.

To upload an add-on:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-Ons > Upload Package**.
3. Click **Browse** to find the Jive .zip package.
4. If you're not ready to publish this add-on to your community, click **Preview**.
5. To test your add-on, create a secret group and experiment with your add-on functionality before [making it available to everyone](#).

## Letting community use your add-on

Once you have tested the add-on you've produced, you can turn it on in your community.

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**Fastpath: User interface: Your avatar > Add-ons**

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If you uploaded your add-on using the **Preview** option, then you need to actually publish it to your community when it's ready. This allows other users in your community to use the tiles and templates provided by your add-on.

To install your add-on on the community:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-ons > Installed**.

3. Click the gear icon next to the add-on that you're interested in, and then click **Visible to entire community**.
4. When the **Permit All Users Access to this Add-on** dialog box, click **Continue**.

## Publishing to the Add-ons Registry

If you're a registered Jive Developer, you can publish your add-on to the Add-ons Registry. Jive reviews the published add-ons, and, if the review is successful, all Jive communities will be able to install the add-on.

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**Note:** If you want to publish your add-on in the Jive Add-ons Registry, you need to be part of the Technology Partner group.

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### Fastpath: User interface: Your avatar > Add-ons

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To publish your add-on to the Add-ons Registry:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on that you want to add to the Add-ons registry, and then click **Publish to Add-ons Registry**.
4. If you have a Jive Developer account, enter your username and password, and click **Submit**. If you're not, click **Create an account**; you'll be redirected to Jive Developers site (<https://developers.jivesoftware.com/jiveapps/#enrollment>) to apply to become one.

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**Note:** After you sign up to become a Jive developer, you receive a UUID, client ID, and client secret. Please record these values as you need them to publish updates to your add-on.

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## Pushing updates to Add-ons Registry

If you add improvements to your add-on after you publish it, you may want to publish the updates to the Add-ons Registry so other communities can enjoy these changes.

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### Fastpath: User interface: Your avatar > Add-ons

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To update your add-on in the Add-ons Registry:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on that you want to update in the Add-ons registry, and then click **Push Update to Add-ons Registry**.

4. If you have a Jive Developer account, enter your username and password, and click **Submit**. [Create an account](#) if you want to apply to become one.
5. If you have a Jive Developer account, enter your username and password, and click **Submit**. If you're not, click **Create an account**; you'll be redirected to Jive Developers site (<https://developers.jivesoftware.com/jiveapps/#enrollment>) to apply to become one.

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**Note:** After you sign up to become a Jive developer, you receive a UUID, client ID, and client secret. Please record these values as you need them to publish updates to your add-on.

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## Retrieving client ID and secret

You can retrieve the client ID and secret for your add-on if you lose track of it. Note that access to the ID and secret can compromise your add-on's security.

To find an add-ons client ID and secret:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **Analytics Services**.
3. Click the gear icon next to the add-on that you're interested in, and then click **View Client ID and Secret**.
4. In the **Client ID and Secret** dialog box, copy the values and paste them to where you can find.
5. Click **Done** to close the dialog box.

## Reviewing active add-on tiles in community

You can use the Add-Ons interface to see which tiles from an add-on are being used in your community and manage access to them place by place.

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### Fastpath: User interface: Your avatar > Add-ons

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Not only can you look at which tiles are active in your community, but you can also use the Community Authorization option to see which Jive places contain those tiles. You can always use this page to revoke the service's access to a tile.

To see the active tiles:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. From the Add-ons tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on you're interested in and select **Community Authorization**.

4. To revoke a service's access to tiles in a place, click **Revoke Access**. This revokes access to all tiles in one place.
5. If you want to remove a service off from your community, you need to perform this step for every place that has tiles that connect to the same service.

## Troubleshooting add-ons

You can diagnose and fix common problems with add-ons by looking at our troubleshooting tips.

### Why can't I uninstall this add-on?

Some add-ons cannot be uninstalled because they're distributed as part of Jive. These add-ons don't have the **Uninstall** option when you click the gear icon.

### There are no add-ons in All Add-ons > Available

The Add-ons Registry may have been disabled, so check the Jive property `jive.appsmarket.registry.enabled`. The Add-ons registry is disabled by default on hosted and on-premise instances, so you may need to set this system property to `true`. If you don't have access to **Admin Console: System > Management > System Properties**, contact [Support](#) to make the necessary changes.

### I can no longer configure tiles, and they are not updating

The integration service may be down or unreachable. If it seems that everything is up and running, you may need to reconnect as described in [Reconnecting to add-on services](#) on page 204.

### My add-on is gone! Can I get it back?

There are only two ways add-ons are uninstalled when it's not done by your Community Admin. First, if we need to ban the add-on in the Add-ons Registry. An add-on might be banned because it violates Jive policies, or because it references a cloud service that is no longer available. Second, add-ons delivered by a plugin may be discontinued. This may be due to licensing or Jive edition changes, or because the plugin was uninstalled.

### When trying to configure a tile, the dialog hangs with a "Loading..." message

The lightweight user interface provided by add-ons for configuring tiles is almost always served on the integration server. Ensure this server is up and running, can be reached by Jive, and has an SSL certificate that Jive accepts. If the related add-on provides a health check URL, you can run service diagnostics from the add-on management page, as described in [Using service diagnostics](#) on page 212.

## Using service diagnostics

Some add-on services use diagnostics, or a health check, that show the network status and provide other system messages. You can use the Service diagnostics to

check on the network connection status of an add-on, as well as any messaging from the resources connected to that add-on.

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**Fastpath: User interface: Your avatar > Add-ons**

---

---

**Note:** Not all add-ons include service diagnostics.

---

To check your add-on:

1. In the user interface, click on your avatar in the upper right corner, and then click **Add-ons**.
2. On the **Add-ons** tab, select **All Add-ons > Installed**.
3. Click the gear icon next to the add-on that you want to check for updates, and then click **Run Service Diagnostics**, if available.

---

**Note:** Some add-ons do not include diagnostics.

---

4. Check the diagnostics to see if there are any communication issues with the add-on.
5. Click **Close** at the bottom of the dialog.

## Creating secure subdomains for apps

Jive provides three levels of security when you enable Jive Apps in your community. The two more secure options require that you establish one or more subdomains.

---

**Fastpath: Admin Console: Add-ons > Domain Security**

---

Subdomains help you isolate apps from your instance preventing a compromised app from affecting your instance, and in the case of the Most Secure option, a compromised app also won't affect any other apps.

The following options are available.

- |                    |   |
|--------------------|---|
| <b>Secure</b>      | Creates one subdomain for all apps to share, but keeps Jive in a separate subdomain, providing an extra layer of security for your instance.<br><br>If you select this option, you must enter the subdomain. For example, type <code>jiveapps</code> to use <code>jiveapps.YourCommunity.com</code> as your new subdomain for all Jive apps to be hosted. |
| <b>Most Secure</b> | Creates subdomains for Jive and each app. This level of security not only protects your instance, it protects individual apps from an exploited app. This setup provides the highest level of security. This solution requires each subdomain to have a unique DNS entry.   |

Typically, these entries can be created as wildcards, and can be secured using a wildcard SSL certificate.

**Not Secure** Continues without setting up any subdomains. This option is only appropriate for testing environments.

## Setting up Records Retention

The Records Retention plugin records who does what, and when they do it, in your Jive community. It captures snapshots of the activity within a community and delivers it to an external archival system. This plugin is a useful tool to help an organization that needs to meet legal requirements, particularly in a regulated industry. It can also be used to track activity in a community.

Records Retention is a built-in plugin for Jive Cloud and Jive version 8.0 and later. To use Records Retention with an older version of Jive, contact [Support](#).

## Understanding Records Retention

The Records Retention plugin is an effective tool to track activity in your Jive community. Before using it, be sure you understand what it captures and where it sends this captured information.

### What is it?

The Records Retention plugin records who does what, and when they do it, in your Jive community. It captures snapshots of the activity within a community and delivers it to an external archival system.

### Why would I use it?

This plugin is a useful tool to help an organization that needs to meet legal requirements, particularly in a regulated industry. It can also be used to track activity in a community.

### What does it capture?

The Records Retention plugin captures the events for each content type and space type. For the list of events, see [Records Retention retained events](#) on page 215.

### Where does it send this captured information?

There are currently three ways to configure the Records Retention plugin:

- **Email (SMTP):** Each event is converted into an email message and delivered it to the configured email inbox or inboxes. For more information on configuration, see [Configuring Records Retention for SMTP](#) on page 216.
- **XML:** Each event is converted into an XML file and put into the Jive server binstore. For more information on configuration, see [Configuring Records Retention for XML](#) on page 219.
- **Actiance (REST):** Each event is sent to an instance of Actiance Vantage by using RESTful communication. For more information about Actiance Vantage, see



Connected Capture on the Smarsh portal at <https://www.smarsh.com/products/connected-capture/vantage-modal>. For more information on configuration, see [Configuring Records Retention for Actiance Vantage](#) on page 221.

## Records Retention retained events

Records Retention tracks creations, updates, and deletions of the user-generated content within Jive. Here you can find which activities are captured.

Content	Retained activities
Document	Create, Delete, Deleting, Like, Unlike, Edit, Move, Expire, Rate, Undelete, View, Other
Blog	Create, Delete, Deleting, Edit, Move, Other
BlogPost	Create, Delete, Edit, Move, Like, Unlike, Rate, View, Other
Task	Create, Delete, Edit, Move, Completed
Poll	Create, Delete, Edit, Vote, Expire, View, Move, Other
Bookmark	Create, Delete, Edit, Other
MessageToFriends	Create, Delete, Edit, Move, Like, Unlike, Rate, Branch
MessageToGroup	Create, Delete, Edit, Move, Like, Unlike, Rate, Branch
Invitation	Delete, RSVP yes, RSVP no, RSVP maybe, Invite
Video	Create, Delete, Edit, Move
Status	Create, Delete, Like, Edit, Move, Rate , Unlike, View, Approve, Associate, Disassociate, Expire, Hide, Moderate, Reject, Sent, Undelete, Vote, Other
Comment	Create, Reply, Delete
Announcement	Create, Delete, Edit, Expire, Other
AbuseReport	Create, Delete
Community	Create, Delete, Edit, Move, Other,
Project	Create, Delete, Edit, Move, Other
SocialGroup	Create, Delete, Edit, Associate, Disassociate, Other,
Category	Create, Edit, Modify category, Delete
Outcome	Create, Delete, Edit
Attachment	Create, Delete, Edit, Download, Other
Like_Acclaim	Create, Delete
Discussion_Message	Create, Delete, Edit, Move, Like, Unlike, Rate, Branch

Content	Retained activities
User	Create, Delete, Edit, Associate, Retired
Avatar	Create, Delete, Edit, Other
User_Relationship	Create, Retired, Other
Profile_Field	Create, Delete, Other,
Service	Create, Delete, Edit, Other
Tile_Category	Create, Delete, Edit, Other
Template_Category	Create, Delete, Edit, Other
Permission_Level	Create, Delete, Edit
System_Permission_Level	Create, Delete,
Direct_Message	Create, Delete, Edit, Move, Like, Unlike, Rate, Branch
Expertise_Tag	Approve, Moderate, Reject, Create, Delete
Image	Changed,
RTC_Interaction	Create
Content_Place_Relationship	Share, Delete, Deleting, Edit
Question	Approve, Reject, Associate, Disassociate, Mark, Unmark, Other
Thread	Locked, Unlocked, Delete
Idea	Create, Edit, Rate, Delete, Move
*	Approve, Reject, Moderate, Share, Tags_Modified

## Configuring Records Retention for SMTP

When configuring Records Retention, you set it to deliver information to SMTP.

### Enabling Records Retention for SMTP

When configuring Records Retention for SMTP, you enable the Records Retention plugin and set the parameters to deliver the gathered information in an email.

---

**Fastpath:** Admin Console: System > Management > System Properties

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**Fastpath:** Admin Console: Records Retention

---

To enable Records Retention:

1. In the Admin Console, select **System > Management > System Properties**.
2. To enable the Records Retention plugin, set the `jive.module.records.retention.enabled` property to `true`.

The **Records Retention** tab appears in the top menu.



3. To select email (SMTP) as the destination, set the `__retention.delivery.task.bean.name` parameter to `retentionSmtpTask`.
4. Go to the **Records Retention** tab.
5. Set the following required parameters:
  - `retention.smtp.message.inbox.address`: The inbox email address where all retention messages are sent.
  - `retention.smtp.reply.to.address`: The "reply to" address.
  - `retention.smtp.envelope.sent.from.address`: The "sent from" address.
  - `retention.smtp.guest.email.to.use`: The replacement email address for content created by anonymous users.
  - `retention.smtp.systemuser.email.to.use`: The replacement email address for activity performed by the Jive system.
6. If necessary, set the additional parameters.

For more information about the available parameters, see [Configuring Records Retention for SMTP](#).
7. Click **Save Settings**.

## Records Retention properties for SMTP

When configuring Records Retention for SMTP you must set at least the required properties. Additionally, you can set other useful properties.

Once you enable the Records Retention plugin, you can configure it for your environment from the **Records Retention** tab. This tab contains a list of configurable settings.

## Required properties

The following properties *must* be changed to set up Records Retention for SMTP:

- `retention.smtp.message.inbox.address`: The inbox email address where all retention messages are sent. This is typically an inbox that your archival systems scans. It can be a single email or a comma-delimited list of emails.
- `retention.smtp.reply.to.address`: The "reply to" address. You can use the same value as `retention.smtp.message.inbox.address` for this address. Bounced messages also go to this address.
- `retention.smtp.envelope.sent.from.address`: The "sent from" address. The value of `retention.smtp.message.inbox.address` may also be used for this address. If your gateway rejects retention messages, you need to set this property to an address that your gateway accepts.
- `retention.smtp.guest.email.to.use`: The replacement email address for content created by anonymous users. Not used for systems where guest access is disabled.
- `retention.smtp.systemuser.email.to.use`: The replacement email address for activity performed by the Jive system. In some scenarios, the system user performs actions in a batched or delayed manner, like when a user and all of their content is deleted from Jive.

## Additional useful properties

The following properties are optional and can be changed as desired:

- `jive.retention.email.subject.format`: How the email subject is formatted. The default is `{regardsTo}[JIVE JOURNAL] - {subject}`. However, this value may be replaced with any hard-coded strings, along with the following replacement keys:
  - `{regardsTo}`: Includes "Re:" on comments, replies, and other non-root entries
  - `{subject}`: Includes the raw subject or title of the root entry
  - `{contentType}`: Includes the content type of the event
  - `{actionType}`: Includes the action type of the event
  - `{objectId}`: Includes the ID of the item affected by the event
  - `{objectType}`: Includes the type of the item affected by the event
  - `{rootId}`: Includes the ID of the root entry of the affected conversation
  - `{rootType}`: Includes the type of the root entry of the affected conversation

For example, set this property to `{subject}` to include only the raw title of the conversation with no additional formatting.

- `retention.attachable.size.limit`: The file attachment size limit specified in bytes. The value should be set to the same maximum size that attachments, images, and uploads are configured within Jive. The value should also be less than the maximum size your email gateway accepts. Defaults to 52,400,000 bytes.
- `retention.deletes.processing.on`: Whether to capture or delete events. Defaults to `false`. Note that delete records have very little information about the content that was deleted.

- `retention.include.author.details`: Whether to include author details in the header. Defaults to `false`. Set this property to `true` to add an `X-AuthorUsername` header with the author's username as the value.
- `retention.reaper.messagearchive.number.of.days.to.keep`: The number of days for which records are retained after they are sent. Records can be saved for a while, so that you can replay events. Defaults to `30`.
- `retention.mail.smtp.server.override`: Whether to override the email settings already specified for the Jive server. Defaults to `false`. Once this value is set to `true` (and the settings are saved), a number of other settings appear (with the `retention.mail` prefix), allowing you to configure the SMTP server settings.
- `retention.max.number.of.cclist.addresses`: CC list threshold for when to send separate emails. If this value is set to `-1` (the default value), there is no threshold. For a list of email addresses larger than this threshold, the message is separated across multiple emails.
- `retention.resolve.and.store.cclists.for.spaces`: Whether to send activity to emails specified in the settings for a given space. Defaults to `true`. This feature can be turned off to improve performance.
- `retention.server.internalEmailDomains`: A comma-delimited list of domains that are considered internal to your organization. If there is a value specified in this list, the plugin ignores users whose email addresses are not found within this list. Useful for reducing the recipient list for each email message, but does not prevent the expense of collecting user addresses on private or restricted content. If no value is specified, all email recipients are included regardless of domain.

## Configuring Records Retention for XML

When configuring Records Retention, you set it to deliver information as an XML file to the Jive server binstore.

### Enabling Records Retention for XML

When configuring Records Retention for XML, you enable the Records Retention plugin and set the parameters to deliver the gathered information into the Jive server binstore.

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**Fastpath:** Admin Console: System > Management > System Properties

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**Fastpath:** Admin Console: Records Retention

---

To enable Records Retention:

1. In the Admin Console, select **System > Management > System Properties**.
2. To enable the Records Retention plugin, set the `jive.module.records.retention.enabled` property to `true`.

The **Records Retention** tab appears in the top menu.



3. To select email (SMTP) as the destination, set the `__retention.delivery.task.bean.name` parameter to `actianceTask`.
4. Go to the **Records Retention** tab.
5. Set the following required parameters:
  - `retention.xml.output.file.directory.name`: The directory where the retention files are saved.
  - `retention.xml.directory.to.put.final.file`: The directory where completed retention files are copied.
  - `retention.xml.output.file.filename.prefix`: The filename prefix for the retention files. The remainder of the filename includes a timestamp to uniquely identify it.
6. If necessary, set the additional parameters.

For more information about the available parameters, see [Configuring Records Retention for SMTP](#).

7. Click **Save Settings**.

## Records Retention properties for XML

When configuring Records Retention for XML you must set at least the required properties. Additionally, you can set other useful properties.

Once you enable the Records Retention plugin, you can configure it for your environment from the **Records Retention** tab. This tab contains a list of configurable settings.

### Required properties

The following properties *must* be changed to set up Records Retention for XML:

- `retention.xml.output.file.directory.name`: The directory where the retention files are saved.
- `retention.xml.directory.to.put.final.file`: The directory where completed retention files are copied.
- `retention.xml.output.file.filename.prefix`: The filename prefix for the retention files. The remainder of the filename includes a timestamp to uniquely identify it.

### Additional useful properties

The following properties are optional and can be changed as desired:

- `jive.retention.email.subject.format`: How the email subject is formatted. The default is `{regardsTo}[JIVE JOURNAL] - {subject}`. However, this value may be replaced with any hard-coded strings, along with the following replacement keys:
  - `{regardsTo}`: Includes "Re:" on comments, replies, and other non-root entries
  - `{subject}`: Includes the raw subject or title of the root entry
  - `{contentType}`: Includes the content type of the event

- `{actionType}`: Includes the action type of the event
- `{objectId}`: Includes the ID of the item affected by the event
- `{objectType}`: Includes the type of the item affected by the event
- `{rootId}`: Includes the ID of the root entry of the affected conversation
- `{rootType}`: Includes the type of the root entry of the affected conversation

For example, set this property to `{subject}` to include only the raw title of the conversation with no additional formatting.

- `retention.comma.separated.emails.for.error.reporting`: A list of comma-delimited email addresses used for error reporting. If the XML creation fails (and is recoverable), an email is sent to each email address listed in this setting.
- `retention.deletes.processing.on`: Whether to capture or delete events. Defaults to `false`. Note that delete records have very little information about the content that was deleted.
- `retention.error.reporting.email.subject`: Subject string for the error reporting email. If the XML creation fails (and is recoverable), an email is sent with this value as the subject.
- `retention.include.author.details`: Whether to include author details in the header. Defaults to `false`. Set this property to `true` to add an `X-AuthorUsername` header with the author's username as the value.
- `retention.reaper.actiancefile.number.of.days.to.keep`: The number of days for which completed XML files are kept.
- `retention.reaper.messagearchive.number.of.days.to.keep`: The number of days for which records are retained after they are sent. Records can be saved for a while, so that you can replay events. Defaults to 30.
- `retention.reaper.messagearchive.number.of.days.to.keep`: The number of days for which records are retained after they are sent. Records can be saved for a while, so that you can replay events. Defaults to 30.
- `retention.resolve.and.store.cclists.for.spaces`: Whether to send activity to emails specified in the settings for a given space. Defaults to `true`. This feature can be turned off to improve performance.

## Configuring Records Retention for Actiance Vantage

You can configure Records Retention for Actiance Vantage (via REST) from the Admin Console.

Actiance Vantage (or Connected Capture) is a service that captures communications over various channels and sends them to an archive for storage. For more information about Actiance Vantage, see Connected Capture on the Smarsh portal at <https://www.smarsh.com/products/connected-capture/vantage-modal>.



## Enabling Records Retention for Actiance Vantage

When configuring Records Retention for XML, you enable the Records Retention plugin and set the parameters to deliver the gathered information as XML to Actiance Vantage service.

---

**Fastpath: Admin Console: System > Management > System Properties**

---

---

**Fastpath: Admin Console: Records Retention**

---

To enable Records Retention:

1. In the Admin Console, select **System > Management > System Properties**.
2. To enable the Records Retention plugin, set the `jive.module.records.retention.enabled` property to `true`.

The **Records Retention** tab appears in the top menu.



3. To select email (SMTP) as the destination, set the `__retention.delivery.task.bean.name` parameter to `actianceTask`.
4. Go to the **Records Retention** tab.
5. Set the following required parameters:
  - `retention.actiance.vantage.authkey`: The consumer key for the network.
  - `retention.actiance.vantage.authsecret`: The consumer secret for the network.
  - `retention.actiance.vantage.hosts`: The domain name of the Actiance Vantage server to send messages to. This value should not include a protocol or port.
  - `retention.actiance.vantage.networkid`: The Network ID assigned to the collaboration network registered in Actiance Vantage.
  - `retention.actiance.vantage.company.id`: The Company ID provided by Actiance Vantage
6. If necessary, set the additional parameters.

For more information about the available parameters, see [Configuring Records Retention for SMTP](#).
7. Click **Save Settings**.

## Records Retention properties for Actiance Vantage

When configuring Records Retention, you set it to deliver information as XML file to Actiance Vantage.

Once you enable the Records Retention plugin, you can configure it for your environment from the **Records Retention** tab. This tab contains a list of configurable settings.

### Required properties

The following properties *must* be changed to set up Records Retention for Actiance Vantage:

- `retention.actiance.vantage.authkey`: The consumer key for the network.
- `retention.actiance.vantage.authsecret`: The consumer secret for the network.
- `retention.actiance.vantage.hosts`: The domain name of the Actiance Vantage server to send messages to. This value should not include a protocol or port.
- `retention.actiance.vantage.networkid`: The Network ID assigned to the collaboration network registered in Actiance Vantage.
- `retention.actiance.vantage.company.id`: The Company ID provided by Actiance Vantage

### Additional useful properties

The following properties are optional and can be changed as desired:

- `retention.actiance.vantage.logresponses`: Whether to log Records Retention activity. Defaults to `true`. If `true`, the plugin outputs additional debugging information in the logs (provided the `com.jivesoftware.retention.task.restapi.impl` logger is set to `INFO` or lower).
- `retention.deletes.processing.on`: Whether to capture or delete events. Defaults to `false`. Note that delete records have very little information about the content that was deleted.
- `retention.include.author.details`: Whether to include author details in the header. Defaults to `false`. Set this property to `true` to add an `X-AuthorUsername` header with the author's username as the value.
- `retention.reaper.messagearchive.number.of.days.to.keep`: The number of days for which records are retained after they are sent. Records can be saved for a while, so that you can replay events. Defaults to `30`.
- `retention.reaper.capturedbinary.number.of.days.to.keep`: The number of days for which records are kept. Once a record is sent, it is considered "done" by the retention module. However, records can be saved for a period of time so you can "replay" events. This setting refers to binaries, including attachments, images and uploaded files.
- `retention.resolve.and.store.cclists.for.spaces`: Whether to send activity to emails specified in the settings for a given space. Defaults to `true`. This feature can be turned off to improve performance.

## Connecting communities with bridges

When you connect two communities with a bridge, people can see activity taking place in a community that's separate from the one they're currently using.

For each user, visibility into another community relies on their having a user account in both communities. Bridged communities use web services to communicate with one another.

---

**Note:** This is an optional feature available as a module. For more information, ask your Jive account representative.

---

### One-way or two-way visibility

Administrators from communities at both ends of a bridge decide whether the bridge should support content visibility one way or both. An administrator managing or configuring an internal-facing community (one designed to serve a closed audience, such as a company's employees) might see value in requesting a bridge to an external-facing community (such as a support site for the company). Content from the external community visible to employees internally could offer an easy way for employees to see external content from customers. But going the other way—internal content visible to external community members—is often not as valuable.

When setting up a bridge, administrators from both ends decide whether, and how much, content should be visible from their own community to the other. Bridge settings at both ends provide the ability to enable or disable these features.

### Bridged features

With bridged communities, users of the local community can:

- See a list of the bridged communities.
- Log in to a bridged community from the local community.
- Receive results from the bridged community as part of their searches.

## Setting up bridges

A community uses web services to retrieve information from other bridged communities, presenting much of the same information in the local community that people can get by going to the bridged community directly.

---

**Fastpath:** **Admin Console: System > Settings > Bridges**

---

When you set up the bridge, you're not just making the connection possible. You're also setting how people who are using the community will see the connected community. So as you set up the bridge, when entering values to help identify the bridged community, you should enter values that make sense from a user's perspective. Bridging works for registered users.

When you add a bridge in one community, you set up the bridge in your side. Then you send a request to the other community that an administrator there will need to approve.

## Creating a bridge

To create a bridge from the current Jive community to another:

1. Enable bridging for the communities you want to connect as follows:
  - a. In the Admin Console, go to **System > Settings > Web Services** .
  - b. On the **Bridging** tab, select **Enabled** for **Enable Bridges Web Services**.
  - c. Click **Save Settings**.
2. On the primary community, add the bridge as follows:
  - a. In the Admin Console, go to **System > Settings > Bridges** .
  - b. Click **Add bridge**.

This opens the **Add bridge** dialog box.
  - c. In **Bridge URL**, enter the URL for the community you're bridging to.

This should be the community's root URL, which points to the community's home page.
  - d. In **Sign in credentials**, enter the user name and password that should be used to connect to the bridged community.

These credentials should correspond to a valid user account on the community you're bridging to, and are used only to make the request. When the connection is approved, a shared user account is created and used for authenticating between instances.
  - e. Click **Lookup** to attempt to connect to the instance you're bridging to.

After it succeeds, you are prompted to finish configuring.
  - f. In **Bridge name**, enter the name that users should see when they are browsing content retrieved from the bridged community.

If the bridged community's name is a long one, you should use a short version of it here.
  - g. For **Bridge features**, select the features that should be available across bridged communities.
  - h. If you have an icon that represents the bridged community, browse for its image file.

For example, you might want to use the bridged community's favicon.
  - i. When you're finished, click **Save**.

## Approving a bridge

An administrator from the bridged community must approve the bridge request using that community's Admin Console. To review the bridge request:

1. In the Admin Console, go to **System > Settings > Bridges** and locate the pending bridge request.
2. When reviewing the bridge request, you can:
  - View information about the requesting community (such as its URL) and select features that should be served (that is, reciprocated) to the requesting community by clicking **View/edit details**.
  - Approve the bridge request by clicking **Approve**.
  - Reject the request by clicking **Reject**.

---

**Note:** If you have trouble searching across the bridge, double-check the OpenSearch engine associated with it. In the Admin Console, you can do a test search using OpenSearch engines.

---

## Disabling or deleting bridges

You can disable or delete a bridge so that the bridged community's content is no longer visible in the current community.

You can disable or delete the bridge on the Bridges page of the Admin Console.

---

**Fastpath:** **Admin Console: System > Settings > Bridges**

---

To disable or delete a bridge:

1. In the Admin Console, go to **System > Settings > Bridges** and locate the bridge you want to disable or delete.
2. In the corner of the bridge's settings box, click **Disable**.

The bridge is disabled for both communities. If necessary, you can re-enable it.

3. To delete the bridge, after you've disabled it, click **Delete this bridge**.

The bridge is deleted for both communities.

## Managing customizations

You can enhance the application's features with plugins and other extensions.

Depending on how your community is set up and which plugins you've purchased, you may or may not be able to access some of these features.

For more information about theming your community, see [Theming community](#) on page 13.

## Simple phrase substitution in UI

*You can give other names to things users see in the user interface. For example, you can rename "Documents" and "Discussions" to "Articles" and "Conversations." By using the Admin Console, you can make the substitutions in a simple way for the most common terms.*

---

**Note:** Because your phrase substitutions are part of your theme, they are overridden if you change your site's theme. When you upgrade, they are overwritten and you have to recreate them.

---

---

**Fastpath:** **Admin Console: System > Settings > Phrase Substitutions**

---

**Note:** This topic describes how to make simple phrase substitutions. For more advanced use of the feature, see [Advanced phrase substitution in UI](#).

---

### How it works

All of your substitutions are made at run time. That is, the application keeps track of what word or phrase you want displayed, then inserts your phrase for the default phrase when someone views a page that includes the phrase. The default phrases themselves come from internationalization (i18n) properties files used for localization. Also, your substitutions are associated with a theme. That means that you can make your substitutions globally or by mapping the change to a particular part of the user interface.

In the backend, your substitutions are remembered as "substitution rules" that use regular expressions. The rules give you a way to fine tune the substitutions to meet your needs.

### Making simple substitutions

You can substitute common phrases that are predefined. The simple substitution mechanism is designed to account for upper- and lower-case versions of the phrases. However, there are some aspects of the change it doesn't account for, for example, a change to an article that would precede the word. Substituting "article" for "document" would leave awkward constructions in English, such as "Create a article or upload a file" (where you'd want "Create *an* article or upload a file"). To review the outcome of the change you're making, click **View Rules** to see the rules page, where you can get a preview (you need to save your changes first).

---

**Note:** You should always test your changes on an instance of the application that people aren't currently using. That way, you can work things out before the changes impact the work of users.

---

To define simple rules:

1. In the Admin Console, go to **System > Settings > Phrase Substitutions** .
2. Choose the theme that the substitution should be a part of and a locale in which the substitution should occur. Beneath these selections you can see a list of the phrases you can make substitutions for.
3. If the phrase you want to change is listed on the far left side, enter your alternatives for singular and plural versions of the phrase.
4. Click **Save** to make the substitution.

---

**Note:** You don't need to restart the application or server for the change to take affect

---

After you save the rule, you can view the rules on the **Phrase Substitutions page** and see the details of the substitution rule you're creating.

**Phrase Substitutions**

Choose a Locale and Theme to which these set of rules should apply.

Locale: English (United States): en\_US

Theme: site global

Choose alternative phrases.

	Singular	Plural
Space:		
Document:	Article	Articles
Discussion:		
Blog:		

Save Cancel View Rules

You won't see the substitution in effect until you assign the theme you select to a part of the user interface.



## Customizing with plugins

Plugins are used to add new features to Jive, including new widgets, other UI features, and the ability to override existing workflow. As an administrator, you can control which plugins are available to users.

---

**Fastpath:** Admin Console: System > Plugins > Installed Plugins

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---

**Fastpath:** Admin Console: System > Plugins > Add Plugin

---

If your community has any plugins installed, you can view a list of them in the Admin Console on the **Installed Plugins** page.

The **Add Plugin** page lists the plugins that are available to you. It also provides a place to add plugins for which you have a JAR file. The latest versions of Jive-supported plugins are available in [Jive Extensions Catalog](#) on Worx.

Whenever you add or remove a plugin, you need to restart the application server.

---

**Note:** In previous versions you could deploy a plugin by copying its JAR file to your plugins directory. That's not supported in this version.

---

## Customizing with widgets

Jive includes widgets with which users can customize Overview pages. As an administrator, you can control which widgets are available to users.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

Widgets are not responsive in design and are used only on the old-style widgetized Overview pages for places. Activity and custom pages (including place templates) use the newer, responsive and more performant data tiles and don't include widgets.

---

**Fastpath:** Admin Console: System > Settings > Widgets

---

You can control which widgets are available in your community by adding or removing widgets on the Widgets page in the Admin Console.

For more information about widget usage, see [Designing Overview pages for places](#) on page 329.

## Managing feeds

Like many web sites and applications, the Jive application provides the ability for users to subscribe to a content digest by using a feed.

By subscribing to a feed and using a feed reader (also known as a feed aggregator or news reader), users can discover what has changed in the application without having to visit the application. Feeds provide data about content in a format that a feed reader can use.

## Configuring Feeds

Feeds are enabled by default. From the Admin Console, you can turn feeds on or off, specify which format should be available and whether users (via their feed readers) should be required to send a username and password with feed requests.

---

**Fastpath: Admin Console: System > Settings > Feeds**

---

To enable and configure feeds:

1. In the Admin Console, go to **System > Settings > Feeds**.
2. To enable the feeds, set **Enable Feeds** to **Enabled**.
3. In **Author Format**, select how the author information must be sent in RSS 1.0 and RSS 2.0 feeds: in a `<dc:creator>` or `<author>` element.
4. In **Basic Authentication**, select if the basic authentication is required or not.  
  
If you have an internal community (for example, communities that typically involve only employees or other internal audiences), basic authentication is required by default.
5. In **Default Format**, select the feed format.
6. In **Number of Items**, enter the number of items to be displayed in a feed.
7. In **Show**, select if the summary or the full text of the item must be sent.
8. Click **Save Settings**.

---

**Note:** If you have SSO enabled in your community, feeds are not supported because feed reader cannot follow HTTP redirects for authentication.

---

---

**Note:** For users to use the links available in feeds, you must specify the public web path to your installation in the `jiveURL` property. This is necessary to support links to it from the content listed in the feeds. Typically you set the `jiveURL` when you're setting up or by using the Admin Console. For more information, see [Changing community URL](#) on page 27.

---

## Available feeds

Jive offers feeds in three formats: RSS (Really Simple Syndication), Atom, and JSON (Javascript Object Notation). Each of these carries the feed data differently.

### Variables in feeds

In feed URLs, Jive supports a number of variables that are listed in this topic.

### Available variables

You can use the following variables while defining feed URLs:

- `tag_name`: The tag applied to the blog post. In the user interface, tags are listed at the bottom of the post, or in the content.
- `user_name`: The user's login name.
- `community_id`: The community ID. You can find this number at the end of the URL after you click **View Feeds** in the **All Content** page. In the Admin Console, the ID number is shown at **Spaces > Settings > Space Settings**.
- `document_id`: A unique identifier for a document. You can find the ID at the end of the URL when you're viewing a document in the application.
- `post_id`: A unique identifier for a blog post.
- `blog_name`: A blog's name. For a user blog, this is typically the user's name.
- `search_string`: For feeds based on searches, this is the URL search parameter created when the user searches.

### Examples

Here is an example with the typical full set of search parameters included. In this case, the search term is "macro".

```
q=macro&resultTypes=BLOG_POST&resultTypes=DOCUMENT&resultTypes=MESSAGE&resultTypes=COMMUNI  
&peopleEnabled=true&dateRange=all&communityID=2000&numResults=15&rankBy=10001
```

The example search string includes the following parameters:

- `resultTypes`: The kinds of content to search.
- `peopleEnabled`: Whether to search people's profiles.
- `dateRange`: The date range when the content was added. Acceptable values are: `yesterday`, `last7days`, `last30days`, `last90days`, `thisyear`, and `lastyear`.
- `communityID`: The ID number for the space.
- `numResults`: The number of results to display.
- `rankBy`: How results should be sorted. Acceptable values are: `rating`, `relevance`, `subject`, `likes`, and `date`. For example, you can specify `rankBy=rating`.

## Additional parameters

You can also include the following parameters in your feed URL:

- `full`: Whether to include the full content in the results. Include `full=false` as a parameter when you want to return just a summary in feed results.
- `numItems`: The number of results to return. For example, you could include `numItems=25` to return 25 results. The default is 10.

In addition, if your community requires basic authentication (a user name and password), you might need to prepend the feed URL with the user name and password parameters. Here is an example:

```
https://<username>:<password>@<domain>/community/feeds/documents
```

If you do not want to enable basic authentication but need to send a user name and password, you can use the following form (note that this is less secure):

```
https://<domain>/community/feeds/documents?username=<username>&password=<password>
```

## Feeds system-wide

You can retrieve system-wide feed results by using the URLs listed in this topic.

Feed Subject	URL Syntax
All content	<code>https://&lt;domain&gt;/community/feeds/allcontent</code>
Tags	<code>https://&lt;domain&gt;/community/feeds/tags/&lt;tag_name&gt;</code>
Discussion messages	<code>https://&lt;domain&gt;/community/feeds/messages</code>
Popular discussions	<code>https://&lt;domain&gt;/community/feeds/popularthreads</code>
Discussions	<code>https://&lt;domain&gt;/community/feeds/threads</code>
Unanswered questions	<code>https://&lt;domain&gt;/community/feeds/unansweredthreads</code>
New blogs	<code>https://&lt;domain&gt;/blogs/feeds/blogs</code>
Blog tags	<code>https://&lt;domain&gt;/blogs/feeds/tags/&lt;tag_name&gt;</code>
Status updates	<code>https://&lt;domain&gt;/blogs/feeds/updates</code>
Documents	<code>https://&lt;domain&gt;/community/feeds/documents</code>
Statistics	<code>https://&lt;domain&gt;/community/feeds/stats</code>
Announcements	<code>https://&lt;domain&gt;/community/feeds/announcements</code>
Polls	<code>https://&lt;domain&gt;/community/feeds/polls</code>
Videos	<code>https://&lt;domain&gt;/community/feeds/video</code>
Ideas	<code>https://&lt;domain&gt;/community/feeds/idea</code>
Recent blog posts	<code>https://&lt;domain&gt;/blogs/feeds/posts</code>
Recent blog comments	<code>https://&lt;domain&gt;/blogs/feeds/comments</code>

Feed Subject	URL Syntax
Blog author	<code>https://&lt;domain&gt;/blogs/feeds/users/&lt;user_name&gt;</code>
Search	<code>https://&lt;domain&gt;/community/feeds/search?&lt;search_string&gt;</code>

## Feeds per space

Feed URLs for a particular space are similar to the system-wide feed URLs. The difference is that the space-specific feed URLs are appended with the space ID number.

You can find the space ID in **Admin Console: Space > Settings > Space Settings**.

Feed Subject	URL Syntax
All content	<code>https://&lt;domain&gt;/community/feeds/allcontent?communityid=&lt;community_id&gt;</code>
Documents	<code>https://&lt;domain&gt;/community/feeds/documents?communityid=&lt;community_id&gt;</code>
Discussion messages	<code>https://&lt;domain&gt;/community/feeds/messages?communityid=&lt;community_id&gt;</code>
Discussion threads	<code>https://&lt;domain&gt;/community/feeds/threads?communityid=&lt;community_id&gt;</code>
Popular discussion threads	<code>https://&lt;domain&gt;/community/feeds/popularthreads?communityid=&lt;community_id&gt;</code>
Unanswered threads	<code>https://&lt;domain&gt;/community/feeds/unansweredthreads?communityid=&lt;community_id&gt;</code>
Recent blog posts	<code>https://&lt;domain&gt;/blogs/feeds/posts?communityid=&lt;community_id&gt;</code>
Tag	<code>https://&lt;domain&gt;/community/feeds/tags/&lt;tag_name&gt;?communityid=&lt;community_id&gt;</code>
Announcements	<code>https://&lt;domain&gt;/community/feeds/announcements?communityid=&lt;community_id&gt;</code>
Polls	<code>https://&lt;domain&gt;/community/feeds/polls?communityid=&lt;community_id&gt;</code>
Statistics	<code>https://&lt;domain&gt;/community/feeds/stats?communityid=&lt;community_id&gt;</code>

## Feeds per blog

Feed URLs for blogs include the blog name or a tag to filter the blog posts.

Feed Subject	URL Syntax
Recent posts	<code>https://&lt;domain&gt;/blogs/&lt;blog_name&gt;/feeds/posts</code>
Blog tags	<code>https://&lt;domain&gt;/blogs/feeds/tags/&lt;tag_name&gt;</code>
Recent comments	<code>https://&lt;domain&gt;/blogs/&lt;blog_name&gt;/feeds/comments</code>
Comments on a post	<code>https://&lt;domain&gt;/blogs/&lt;blog_name&gt;/feeds/com- ments?blogPost=&lt;post_id&gt;</code>

## Feeds per document

Feed URLs for documents include the document ID. You can find the ID at the end of the URL when you're viewing a Jive document.

Feed Subject	URL Syntax
Comments	<code>https://&lt;domain&gt;/community/feeds/document-com- ments/&lt;document_id&gt;</code>
Version history	<code>https://&lt;domain&gt;/community/feeds/document-histo- ry/&lt;document_id&gt;</code>

## Feeds per person

Feed URLs for content created or updated by a user include the user name. You can find the user name at the end of the URL when you're viewing the user profile.

Feed Subject	URL Syntax
Discussion messages	<code>https://&lt;domain&gt;/community/feeds/messages?rssUser- name=&lt;user_name&gt;</code>
Documents	<code>https://&lt;domain&gt;/community/feeds/documents?rssUser- name=&lt;user_name&gt;</code>
Blog posts	<code>https://&lt;domain&gt;/blogs/feeds/users/&lt;user_name&gt;</code>
Updates	<code>https://&lt;domain&gt;/people/&lt;user_name&gt;/feeds/updates</code>

## Spam prevention

You can use a variety of best practices to avoid spam in your community. Here are some general spam prevention strategies, as well as those that target specific spammers.

Community administrators of externally-facing communities should develop a strategy for dealing with spam. (Internally-facing communities do not typically experience spam.) Here you can find general spam-prevention methods, as well as methods for targeting specific spammers. You can choose the methods that should work best for your community. For more information, see [Basic spam prevention](#).

In addition to these out-of-the-box features, if you are managing an externally-facing community, you may want to enable the advanced spam prevention service. For more information, see [Advanced spam prevention](#).

For more information about spam prevention, refer to [Best Practices for Spam Management](#) on . Note that you must be a registered user to see this document.

## Basic spam prevention

You can use a variety of best practices to avoid spam in your community. Here are some general spam prevention strategies, as well as those that target specific spammers.

### General spam prevention methods

You can employ a variety of methods for preventing spam.

#### Moderating new user registrations

You can assign moderators to approve or reject new user registrations. Note that this is possible if your community is not using SAML.

For more information, see [Setting up user registration moderation](#) on page 428.

#### Enabling Captcha for new user registrations

You can require that users type in a Captcha image when they register for the community. For more information, see [Configuring self-service user registration](#) on page 138.

#### Requesting email validation

You can require that the application send an email to the address a new user provides at registration. The user must then use a link in the email to complete registration. For more information, see [Configuring self-service user registration](#) on page 138.

#### Restricting email domains

You can restrict the domains from which email registrations can be accepted. For this, you modify the following parameters:

- Set `registration.domainRestriction.enabled` to `true`
- List the allowed domains, separated by commas in `registration.domainRestriction.domains`
- Specify your company name in `registration.domainRestriction.company`

You can modify these parameters in the Admin Console, **System > Management > System Properties** .

#### Enabling Captcha at user login

You can require that users type in a Captcha image when they log in to the community. For more information, see [Configuring login settings](#) on page 142.



## Limiting permissions for guest users

You can disable the ability of guests to create content by limiting the permissions of Everyone to view-only (guests are members of Everyone social group). And you can give only registered users (All Registered Users social group) the ability to create content. For more information, see [Managing permissions](#) on page 371.

## Enabling Akismet for blog comments

You can use Akismet service to help prevent blog comment spam. For more information, see [Configuring blogs system-wide](#) on page 94.

## Configuring keyword and message governor interceptors

You can limit the frequency of posts and search for spam keywords. For more information, see [Interceptors overview](#) on page 121.

## Enabling abuse reporting

You can allow users to report abusive content by clicking an abuse label on the content, which is then sent to a moderator. For more information, see [Setting up abuse reporting](#) on page 358.

## Enabling content moderation

You can enable content moderation so that users must submit content for approval before it's published in the community. For more information, see [Setting up content moderation](#) on page 425.

## Enabling link moderation

You can require moderation of content that contains external URLs that are not whitelisted. You can also configure link moderation so that all content by users who do not have a certain amount of status points is automatically moderated.

You can enable link moderation in the Admin Console, **System > Moderation > Configure Spam Link Prevention**.

## Targeting specific spammers

You can block specific users by their login or by IP.

## Banning users

You can ban malicious users by blocking their login credentials or their IP address. For more information, see [Configuring banning](#) on page 149.

## Ban IP addresses

You can ban one or more or a range of IP addresses. For more information, see [Configuring banning](#) on page 149.

## Advanced spam prevention

If your community needs additional spam prevention features, you can check out these extra levels of support.

For more information about these services, see [Spam prevention service and 3rd party integration: mollom offering](#) on .

---

**Fastpath: Admin Console: System > Moderation > Spam Prevention Service**

---

### Using Spam Prevention service

This service has more functionality than the basic spam prevention measures. Specifically, this service implements moderation rules developed by analyzing spam attacks across the Jive customer base to provide the most up-to-date spam detection methods.

The Spam Prevention Service is a free service.

### Using Spam Prevention service with third-party integration

This service relies on sophisticated machine learning techniques to block spam and malicious content automatically. The integration uses a reputation-based system that keeps a continually evolving archive of user profiles to immediately determine a user's potential to create spam. This applies to everything from user registration forms to blog entries.

This is a monthly, fee-based service.

## Configuring binary storage provider

*By default, Jive stores binary content (attachments on blog posts, discussions, uploaded documents, images, profile pictures, and avatars) in the application database, but we recommend migrating binary content to a different binary storage provider.*

*Storing binary content data in a location outside the database is efficient and scalable. For production Jive systems, we recommend using a shared file system for storing all binary content. Documents created in the content editor are not binary content and are stored in the application database.*

### Preparing to migrate to shared file system location

You need to migrate your binary storage provider if:

- You want to use a file system provider instead of the JDBC provider enabled by default.
- You want to use the provider you're currently using, but change how you're using it. For example, you might want to use a different file system location for the file system provider.

Before you migrate to a different provider, you should do the following:

- Back up your current storage provider's backing store.
- Run a successful migration on a backup of this system.

---

**Note:** Do not run the migration tool during a busy period.

---

- Make sure the file system location is always available to the application.
- Estimate the amount of space you need for shared storage. For more information, see [Required external components](#) and [Sizing binary storage](#).

Note the following things as you go through the migration process:

- During the migration, any new binary content is stored in both the current and the new storage provider. Once the migration has completed successfully, the system switches over to the new provider.
- If any errors occur during migration, the system reverts back to the current storage provider settings to allow the system to continue to function normally. Errors are logged, as described in [Using application logs](#) on page 434. When you've addressed the errors, start over with migration.
- Note that binary content caching is disabled during migration. This might cause increased load on both the current storage provider as well as the application in general.
- Allow at least a couple of hours for binary storage migration unless you have a trivial amount of content, for example, if you're just starting a community.
- When configuring a file system provider, you specify a namespace. The namespace helps ensure that data is isolated for the application instance it belongs to. So, for example, if you had multiple instances (such as an internal and an external instance), you could use the same storage server while giving the storage provider for each instance a different namespace.

### Migrating to shared file system for binary storage

---

**Fastpath:** Admin Console: System > Settings > Storage Provider

---

To migrate to a shared file system:

1. Prepare a single unit of shared NFS or block-level storage on your SAN/NAS, and mount it from each of your web application nodes using the same mount point on each node (for example, `/opt/jiveBinStore`).

For information on estimating the amount of shared storage you need, see [Sizing binary storage](#).

2. From the **Storage Provider** page in the Admin Console, click **Migrate to another Storage Provider**.
3. In **Registered Providers**, select **FileStorageProvider**.
4. Click **Continue**.
5. Enter a namespace that corresponds to binary data for this application instance.

6. Enter the path to the local directory that you mapped to a mountable location in Step 1 on page 238.
7. Click **Continue**.
8. Read the notes, review, and confirm that the settings shown are the values you specified.
9. To delete binary content from the current source storage after migration, select the **Delete binary content** check box.
10. Click **Start Migration** to begin the process.
11. When the migration is complete, restart the application.
12. Disable local file caching:
  - a. Go to **System > Settings > Storage Provider**.
  - b. Click **Edit** under **Caching**.
  - c. Select **No** under **Cache Enable**.
  - d. Click **Save**.

## JDBC storage providers

You can also migrate content to JDBC storage providers (a DBMS).

To migrate to a different provider:

1. In the Admin Console, go to **System > Settings > Storage Provider**.
2. Click **Migrate to another storage provider**.
3. In **Registered Providers**, select **JdbcStorageProvider**.

## About using databases for binary storage

When you use another database for binary content storage, you specify a JNDI name corresponding to the database. During migration to the new provider, the application creates the database tables needed.

In a cluster, the JNDI name must be the same on each node where you configure an instance to use the provider.

## Sizing binary storage

To estimate your binary storage requirements, consider your likely number of users and the kinds of materials they may upload.

When estimating the size of your shared storage, the stored footprint for each version of each converted document is about 130 percent of the size of the uploaded document. So, for example, a 5 MB document uploaded by the user means about 6.5 MB of storage needed for each version of the document in your binary storage provider. That's because for each document for which the application generates a preview — for each *version* of that document — the application generates a preview, thumbnail images, and PDFs.

---

**Note:** You only see the increased stored footprint for certain uploaded document types, such as Word, PowerPoint, Excel, and PDF, and it does not occur for all

documents. For example, you won't need increased storage for ZIP files or text files. Attachments, images, and any plugins that store binary content also use an increased stored footprint.

---

Customer size	# of users	Initial size	Extra storage per month
Small (internal)	100 to 500	25 GB	1 GB
Medium (internal)	500 to 5,000	100 GB	5 GB
Large (internal)	50,000+	500 GB	20 GB
Public*	n/a	100 GB	1 GB

\* External sites commonly do not allow attachments or binary documents, so they typically don't use a lot of binary storage.

## Filtering web robots

You can use the web robots settings to ensure better community performance when you're experiencing heavy traffic from bots and spiders hitting your site.

---

**Fastpath:** Admin Console: System > Settings > Web Robots

---

If you find that web robots constitute a large part of site traffic, you can limit the amount of extra information overhead caused by these visits by setting rules to identify bots based on the User-Agent values found in the HTTP header. The rules you set determine how page views are reported and analyzed. Because bots change constantly, you may need to modify or add rules from time to time.

When you create rules, you can specify a literal substring, or you can use a fully-anchored regular expression for pattern matching. For the Java grammar for regular expressions, see the Java documentation at the Oracle portal (<http://download.oracle.com/javase/tutorial/essential/regex/>).

All the strings defined in this list are used to filter out bots: you must remove any strings you don't want to match. You can also restore the pre-defined list.

## Fine-tuning with system properties

System properties configure application-wide settings. Some of the settings correspond to configuration elements in the Admin Console user interface.

---

**Fastpath:** Admin Console: System > Management > System Properties

---

*System properties* are name-value pairs that configure particular aspects of Jive. Names and values for system properties and extended properties are case-sensitive.

Many of the system properties are tied to other settings in the Admin Console so that changing the value in the console changes the value of the corresponding system property. For more information on the properties and their effects, see [System properties reference](#) on page 241. For more information, refer to [Undocumented Jive System Properties](#) on Worx.

: Changes to some system properties have a dramatic impact on the system — a wrong value can break the application. Generally, you should leave system properties unchanged unless you're asked to change it by [Support](#). You might also change a system property value if the change is part of a more significant effort to customize the application.

## System properties reference

Here you can find a reference of Jive system properties.

**Fastpath:** **Admin Console: System > Management > System Properties**

**Note:** This list is currently missing some entries and will be updated. For more information, see [Undocumented Jive System Properties](#) on Worx.

To make changes to system properties:

- In the Admin Console, go to **System > Management > System Properties** .

Note that both property names and values are case-sensitive.

: Changes to some system properties have a dramatic impact on the system — a wrong value can break the application. Generally, you should leave system properties unchanged unless you're asked to change it by [Support](#). You might also change a system property value if the change is part of a more significant effort to customize the application.

The following is a list of system properties that are set by default when you install Jive.

### System properties reference

System property	Desc
<code>blog.searchComments.enabled</code>	Determines if comments on search are enabled. The <ul style="list-style-type: none"><li>• <code>true</code>: enabled</li><li>• <code>false</code>: disabled</li></ul>
<code>bridge.connection.proxy.host</code>	The host name of the proxy server you specify so t the community for bridging. The proxy server must not supported by the client used for bridging.
<code>bridge.connection.proxy.port</code>	The port for the proxy server for bridging.

System property	Description
<code>browse.main.docs.show.space.browser</code>	Set to <code>true</code> to have the Documents page use the browser.
<code>browse.main.threads.show.space.browser</code>	Set to <code>true</code> to have the Discussions page use the browser.
<code>checkmail.host</code>	The email server name used for verifying mail settings. See the <b>Server</b> page in the Admin Console.
<code>checkmail.port</code>	The email server port used for verifying mail settings. See the <b>Server</b> page in the Admin Console.
<code>checkmail.protocol</code>	The email protocol used for verifying mail settings. See the <b>Server</b> page in the Admin Console.
<code>communityThreadCount.updateInterval.seconds</code>	The interval, in seconds, between updates to the counts of threads as on the Discussions tab of a social group.
<code>community.extended.property.value.blacklist.regex</code>	Rejects extended property value that matches the pattern.
<code>document.searchComments.enabled</code>	Set to <code>true</code> to enable return of comments on search results.
<code>documentmanager.correctdeletedusers.completed</code>	Determines if the <code>CorrectDeletedUsersTask</code> should be run and checks to make sure that the original author of a document has been deleted, then this task sets the author to <code>guest</code> .
<code>email.search.allowWhiteSpace</code>	Set to <code>true</code> if you want people search to allow white space in email addresses.
<code>feeds.protected</code>	Determines whether or not feeds are protected by login.
<code>GroupManager.className</code>	Qualified class name for the default <code>GroupManager</code> implementation. To use a custom <code>GroupManager</code> implementation to associate groups with users, set this property to the fully qualified class name of the implementation.
<code>http.proxyHost</code>	Specify the host name of the proxy server so Jive can connect to the community for certain features, such as RSS, bookmarks, and feeds.
<code>http.proxyPort</code>	Specify the port for the proxy server.
<code>http.proxyUsername</code>	Specify the username for your proxy server, if required.
<code>http.proxyPassword</code>	Specify the password for your proxy server, if required.
<code>i18n.allowedLanguages</code>	Not currently used
<code>i18n.defaultLanguage</code>	Not currently used
<code>ip.header.max.depth</code>	Specifies how many email jumps are secure from the IP address to reduce the possibility of a fake header when the IP address is taken from the IP at the position given to get to a known IP address. <code>X_FORWARDED_FOR</code> is <code>127.0.0.5</code> , <code>10.61.8.223</code> , <code>10.61.8.223</code> , and <code>ip.header.max.depth</code> is set to <code>2</code> , then the remote IP address is <code>10.61.8.223</code> . If this property is not set or is set to <code>0</code> , the application takes the IP address from the header.
<code>jive.addons.upload.allow.signed.globally</code>	<code>true</code> allows globally signed add-ons to be directly uploaded. <code>false</code> requires signed add-ons directly.
<code>jive.APIThrowsClause.enabled</code>	Setting to <code>true</code> adds a security string to the beginning of the response returned via API. Setting to <code>false</code> with no query parameters returns vulnerable arrays. When you set to <code>false</code> and add a non-vulnerable array, the array is removed for all data, even vulnerable arrays.



System property	Description
<code>jive.auth.disallowGuest</code>	Determines whether or not non-authenticated users. If <code>true</code> , any non-authenticated user will be redirected to the login page.
<code>jive.bodyConversionTask.completed</code>	Determines if the <code>BodyConversionTask</code> should run, which converts posts, comments, and announcements and converts the content up the previous content if any changes were made.
<code>jive.container.category.tagcloudmax</code>	The maximum number of tags shown in a tag cloud. The value is an integer that defaults to <code>30</code> . A very high number will cause performance issues.
<code>jive.cookies.secure</code>	When set to <code>true</code> , the cookie are transferred over HTTPS even on HTTP. For more information on secure cookies, see <a href="#">Secure Cookies</a> .  <b>Note:</b> This value is required to be specified when upgrading from 9.0.7.0 or earlier. For more information, see <a href="#">Preparing for upgrade to 9.0.7.1 or later</a> .
<code>jive.coreapi.disable.binarydownloads.mobileonly</code>	Set to <code>true</code> to enable downloads for mobile devices only.
<code>jive.devMode</code>	Set to <code>true</code> to ensure that images, attachments, and page compression when set to <code>false</code> in conjunction with <code>jive.devMode</code> set to <code>false</code> .
<code>jive.digest.enabled</code>	<code>false</code> to disable the email digest feature. The feature sends users of their activity in the community.
<code>jive.digest.email.sendHour</code>	Hour of the day at which digest emails are sent to users. The value should be a simple integer indicating the hour for 2 p.m., and "23" for 11 p.m. Default is 9.
<code>jive.dv.service.connection.verification</code>	<code>true</code> to have the application server test its connection using the connection. You might want to set this to <code>false</code> (used for the test) on the conversion machine.
<code>jive.featuredcontent.enabled</code>	<code>false</code> to disable the featured content feature. The feature displays featured content on the community page.
<code>jive.featuredcontent.object-type.&lt;typevalue&gt;</code>	<code>false</code> to disable featuring for the specified kind of content you want to disable. For example, to disable document type, <code>type.102 = false</code> . All types are enabled by default.
<code>jive.freemarker.templateUpdateDelay</code>	Set to 1 to tell the application to look for changes to templates outside of the Admin Console, use this property and <code>jive.freemarker.templateUpdateDelay</code> to make them. (Because it can slow performance, use this instance.)
<code>jiveInstanceId</code>	The universally unique instance of the application on a clustered server configuration.
<code>jive.master.encryption.key.node</code>	This property represents one of the <code>node.id</code> files in the failover. Upon restart, the web applications populate the <code>node.id</code> files.  <b>Note:</b> This property must be deleted before upgrading to 9.0.7.1 or later.

System property	Description
<code>jive.mobile.hipaa</code>	Set to <code>true</code> to require the mobile device is Health Insurance Portability and Accountability Act (HIPAA) compliant.
<code>jive.mobile.places.tiles.htmlSupport</code>	Set to <code>true</code> if you want your mobile app to support HTML5 tiles.
<code>jive.module.video.enabled</code>	Set to <code>true</code> if you want to enable the video feature (upload or record). Default is <code>true</code> .  <b>Note:</b> You can use <code>video.upload.enabled</code> and <code>video.record.enabled</code> (both are <code>true</code> by default).
<code>jive.news.enabled</code>	Set to <code>true</code> to enable the news feature; set to <code>false</code> to disable.
<code>jive.pageCached.enabled</code>	FreeMarker pages are cached by default in version 6.0 (you can disable this in the Admin Console). Set this property to <code>false</code> to turn off caching. To allow theme changes to be reflected immediately in the application, caching should be enabled for production instances.
<code>jive.pdf.paper.size</code>	Specifies the default paper size for PDF files generated by the application. Valid values are: ANSI_A, ANSI_B, ANSI_C, ANSI_D, ANSI_E, ISO_A0, ISO_A1, ISO_A2, ISO_A3, ISO_A4, ISO_A5, ISO_A6, ISO_A7, ISO_A8, ISO_A9, ISO_A10, ISO_B0, ISO_B1, ISO_B2, ISO_B3, ISO_B4, ISO_B5, ISO_B6, ISO_B7, ISO_B8, ISO_B9, ISO_C0, ISO_C1, ISO_C2, ISO_C3, ISO_C4, ISO_C5, ISO_C6, ISO_C7, ISO_C8, ISO_C9, JIS_1, JIS_2, JIS_3, JIS_4, JIS_5, JIS_6, JIS_7, JIS_8, JIS_9.
<code>jive.sync.profile.ldap.login</code>	Determines whether LDAP-provided user profile files are used. Set to <code>false</code> for external communities where LDAP is not used.
<code>jive.sync.relationships.ldap</code>	Set to <code>true</code> to use LDAP to build the organizational chart.
<code>jiveURL</code>	The base URL of the installation. This must be set to the URL of the Jive application.
<code>jive.user.lastname.firstname.enabled</code>	Determines whether user names are stored as two parts. If the value is <code>false</code> , then user names are stored as a single string during application setup.
<code>jive.usercontainer.document.enabled</code>	Set to <code>false</code> to turn off the Your Documents feature.
<code>jive.usercontainer.thread.enabled</code>	Set to <code>false</code> to turn off the Private Discussions feature.
<code>jive.xmpp.enabled</code>	Determines whether the XMPP service is enabled.
<code>ldap.adminPassword.key</code>	The private key used to decrypt the LDAP password.
<code>ldap.searchFilter</code>	No longer used
<code>log4j.threshold</code>	The level at which logging messages will be recorded.
<code>mail.smtp.host</code>	Mail server used for sending notifications and messages.
<code>mail.smtp.port</code>	Mail server port used for mail notifications.
<code>officeintegration.enabled</code>	Set to <code>true</code> to enable support for a preview view of Microsoft Office documents.
<code>opensearch.key</code>	A unique ID used for external search engine integration.

System property	Description
<code>passwordReset.caseSensitive</code>	Set to <code>true</code> to allow case-sensitive lookup of usernames. If set to <code>false</code> , allow for case-insensitive username lookup when registering new users. If username values differ only by case, a password reset request will be created. To avoid this, you need to use different usernames for case insensitivity.
<code>polls.voting.private</code>	<code>true</code> to exclude poll votes from visible activity. The default is <code>false</code> among other recent activity.
<code>profile.security.collagues.mgr.enabled</code>	<code>true</code> to specify that a person's manager is included in the profile's visibility for a profile field. If you change this property, the changes take effect. For more information, see <a href="#">Collagues</a> .
<code>profile.security.collagues.drpts.enabled</code>	<code>true</code> to specify that a person's direct reports are included in the profile's visibility for a profile field. If you change this property, the changes take effect. For more information, see <a href="#">Collagues</a> .
<code>search.indexCreated</code>	Tracks the last time the search index was created (in milliseconds).
<code>search.indexVersion</code>	The version of the currently used user index.
<code>skin.default.displayFullNames</code>	Set to <code>true</code> to display the full names of users, or <code>false</code> to display only first names.
<code>skin.default.newAccountCreationEnabled</code>	Determines whether users are allowed to register to create new accounts. The default is <code>true</code> .
<code>stream.websocket.enabled</code>	When <code>true</code> , the stream notification indicator is active for unread content.
<code>system.adminuser.email</code>	The default email address that the system will use when sending emails.
<code>system.adminuser.fromName</code>	The default <code>From</code> name that the system will use when sending emails.
<code>update.lastCheck</code>	Tracks the last time the system checked for updates. Updates to versions of plugins can be downloaded and installed automatically.
<code>ur.graph.hier.default.ID</code>	The ID of the default (hierarchical) org chart graph.
<code>ur.graph.mesh.default.ID</code>	The ID of the default (mesh) friends or connections graph.
<code>user.default.displayEmailAddress</code>	Determines whether or not to display a user's email address in the user profile.
<code>webservices.rest.enabled</code>	Determines whether or not REST-style web services are enabled.
<code>webservices.soap.accessType</code>	The access type for SOAP web services. Possible values are: <ul style="list-style-type: none"> <li><code>all</code>: For all users</li> <li><code>registered</code>: For registered users only</li> <li><code>specificUsers</code>: For specifically named users only</li> <li><code>specificGroups</code>: For specifically named groups only</li> </ul>
<code>macros.unproxyobjects</code>	Set to <code>true</code> to render the link — rather than an error message — when a user has permission to view the linked content. This is <code>false</code> by default. If <code>true</code> , content (such as the linked document's title) from the linked content is viewable.
<code>people.search.pagesize</code>	The number of results per page in people search.

System property	Description
<code>polls.enabled</code>	Turns on polls, and displays the <code>Create a poll</code> link and the permissions to create polls.
<code>questions.markThreadAsQuestionByDefault</code>	Set to <code>true</code> to mark discussions as questions by default in new discussions as checked), or set to <b>false</b> to let users notice that the checkbox is there, and turning it on when they provide a correct or helpful answer.
<code>skin.default.changePasswordEnabled</code>	Determines whether users can change their passwords.
<code>skin.default.headerHTML</code>	Replaces the header logo for the entire application.
<code>skin.default.newAccountCreationEnabled</code>	Determines whether users can register their own user accounts.
<code>skin.default.recentHistoryEnabled</code>	Set to <code>false</code> to hide the History menu on the user's profile page.
<code>system.console.custom.title</code>	The value that should be used in the page title for the console of your community, such as <code>Acme Community Admin Console</code> .
<code>video.download.enabled</code>	Set to <code>true</code> if you want users to download uploaded videos.
<code>video.upload.enabled</code>	Set to <code>true</code> if you want users to upload or record videos.
<code>webservices.soap.enabled</code>	Whether or not SOAP webservices are enabled.
<code>webservices.xmlrpc.enabled</code>	Whether or not XML-RPC webservices are enabled.
<code>webservices.soap.accessType</code>	Sets how users can access webservices. Possible values are: <ul style="list-style-type: none"> <li><code>all</code>: Any users.</li> <li><code>registeredUsers</code>: Disallow anonymous access.</li> <li><code>specificUsers</code>: Only allow specific users. Use the <code>webservices.soap.allowedUsers</code> property.</li> <li><code>specificGroups</code>: Only allow specific groups. Use the <code>webservices.soap.allowedGroups</code> property.</li> </ul>
<code>webservices.soap.allowedUsers</code>	Comma separated list of allowed users by username. Only valid if <code>webservices.soap.accessType</code> is <code>specificUsers</code> .
<code>webservices.soap.allowedGroups</code>	Comma separated list of allowed groups by group name. Only valid if <code>webservices.soap.accessType</code> is <code>specificGroups</code> .
<code>webservices.soap.forceSSL</code>	If this property is set requests that are not over SSL will be redirected to SSL.
<code>mail.valid.tld.pattern</code>	Identifies the valid TLDs pattern used to validate email addresses. The default is <code>com net org edu int mil gov arpa biz aero name coop info nom mobi tk travel</code> . It accepts email addresses ending in these suffixes, by adding the new supported TLD to the end of the pattern. For example, to support <code>qlat</code> append <code> qlat</code> to the pattern: <code>com net org edu int mil gov arpa biz aero name coop info nom mobi tk travel qlat</code> .

System property	Description
<code>webservices.soap.permissionHandler.className</code>	Override this property to customize the inbound Handler.
<code>jive.password.expiration.enabled</code>	<p>Determines if the password expiration feature is enabled.</p> <ul style="list-style-type: none"> <li><code>true</code>: enabled</li> <li><code>false</code>: disabled</li> </ul> <p>The default setting is <code>false</code>. For more information, see <a href="#">Password expiration</a> on page 129.</p>
<code>jive.password.expiration.days</code>	<p>The number of days that a password can be used before it expires. This setting is applied when <code>jive.password.expiration.enabled</code> is set to <code>true</code>.</p> <p>By default, this parameter is not set. Possible values are zero and 60. For more information, see <a href="#">Password expiration</a> on page 129.</p>
<code>jive.password.expiration.notification.days</code>	<p>The number of days before the password expiration notification is sent to a user. This setting is applied when <code>jive.password.expiration.enabled</code> is set to <code>true</code>.</p> <p>The default setting is 7. Possible values are zero and 60. For more information, see <a href="#">Password expiration</a> on page 129.</p>
<code>jive.password.min.life.days</code>	<p>The number of days during which a password cannot be reset. This setting is applied when <code>jive.password.reset.enabled</code> is set to <code>true</code>.</p> <p>The default setting is 1. Possible values are zero and 60. For more information, see <a href="#">Password expiration</a> on page 129.</p>
<code>jive.password.reset.enabled</code>	<p>Determines how community administrators can update passwords. When enabled, administrators can only initiate password resets. When disabled, administrators can reset passwords for the users. The following options are available:</p> <ul style="list-style-type: none"> <li><code>true</code>: enabled</li> <li><code>false</code>: disabled</li> </ul> <p>The default setting is <code>false</code>. For more information, see <a href="#">Password expiration</a> on page 129.</p>

## LDAP system properties

You can modify LDAP system properties to reset some elements of your LDAP configuration.

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**Fastpath:** Admin Console: **System > Settings > System Properties** .

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These settings are for expert users. To use system properties:

1. In the Admin Console, go to **System > Settings > System Properties** .
2. Edit a property if it is present in the list or add definition under **Add new property**.
3. Restart your instance after making any system property changes.

**Table 21: LDAP system properties**

Property	Meaning	Sample Values
<code>ldap.ssl.certverification</code>	The SSL certification verification switch. By default, the property is set to <code>true</code> , which verifies the SSL certificate is valid when you're running LDAP over SSL. If you set this to <code>false</code> , you can run in an insecure mode. For more information, see <a href="#">LDAP certificates</a> on page 61.	<code>true</code>
<code>ldap.serverType.id*</code>	The type of LDAP instance. Possible values: <ul style="list-style-type: none"> <li>• 2: Active Directory</li> <li>• 3: openLDAP</li> <li>• 4: other type</li> </ul>	2
<code>ldap.host*</code>	The hostname or IP address of the LDAP server.	<code>ldap.jive.com</code>
<code>ldap.port*</code>	The port number of the LDAP server.	389 (default) or 636 (SSL)
<code>ldap.usernameField*</code>	The LDAP field name used to look up user name values.	<code>uid</code>
<code>ldap.baseDN*</code>	The Distinguished Name of the base of your LDAP tree.	<code>DC=support, DC=jive, DC=com</code>
<code>ldap.nameField^</code>	The element key for the name attribute.	<code>cn</code>
<code>ldap.firstNameField^</code>	The element key for the First Name attribute.	<code>givenName</code>
<code>ldap.lastNameField^</code>	The element key for the Surname attribute.	<code>sn</code>
<code>ldap.emailField*</code>	The element key for the Email attribute.	<code>mail</code>
	The property that specifies whether to enable connection pooling.  For more information, see Connection Pooling Configuration in the Oracle Help Center at <a href="http://download.oracle.com/javase/jndi/tutorial/ldap/connect/config.html">http://download.oracle.com/javase/jndi/tutorial/ldap/connect/config.html</a> .	<code>true</code>

Property	Meaning	Sample Values
<code>ldap.followReferrals</code>	The property that specifies whether LDAP queries will follow referrals. This property should always be set to true for Active Directory.	true
<code>ldap.adminDN*</code>	The DN for the LDAP admin user. This user does not need to be a Jive user.	CN=Admin-Man,OU=Domain Users,DC=support,DC=jive,DC=com
<code>ldap.adminPassword*</code>	The encrypted password for the LDAP admin.	a54313f2d3bc98fb5234566
<code>ldap.adminPassword.key*</code>	The key used to encrypt the admin password.	
<code>ldap.adminPassword.encrypted*</code>	The property that specifies whether or not the Admin password is encrypted. This property should always be set to true.	true
<code>ldap.ldapDebugEnabled</code>	<p>The property that specifies whether LDAP debug logging is on.</p> <hr/> <p><b>Caution:</b> If <code>ldap.ldapDebugEnabled</code> is on (true), LDAP traffic can be logged, and user passwords can be printed in plain text to the application's <code>sbs.out</code> log file if connections to LDAP are unencrypted (non-SSL). It is your responsibility to ensure that your LDAP communication runs over an SSL connection.</p> <hr/> <p><b>Important:</b> LDAP logging is extremely verbose and should never be used in production unless recommends it. Using debug mode can cause serious performance problems or system failure.</p> <hr/>	false
<code>ldap.sslEnabled</code>	The property that specifies whether to use an SSL connection to communicate with the LDAP server.	false
<code>ldap.initialContextFactory</code>		



Property	Meaning	Sample Values
<code>ldap.searchFilter</code>	The filter the is applied to a remote directory when searching for users.	
<code>ldap.groupNameField</code>	The field that maps a group to its CN in LDAP.	<code>cn</code>
<code>ldap.groupMemberField</code>	The field that maps a group to its members.	<code>member</code>
<code>ldap.groupDescriptionField</code>	The field that maps a description of a group.	<code>description</code>
<code>ldap.posixMode</code>	The property that specifies whether to connect to LDAP in POSIX mode. POSIX groups store their member associations by common name (CN) rather than full distinguished name (DN).	<code>false</code>
<code>ldap.posixEnabled</code>	The property that specifies whether to connect to LDAP in POSIX mode. POSIX groups store their member associations by common name (CN) rather than full distinguished name (DN).	<code>false</code>
<code>ldap.groupSearchFilter^</code>	The filter that is applied to a remote directory when searching for groups.	<code>(object-Class=group)</code>
<code>ldap.managerField</code>	The field that maps the DN of a user's manager. This is used when syncing relationship fields.	<code>manager</code>
<code>ldap.photoField</code>	The field that maps a photo to a user's profile.	<code>photo</code>
<code>ldap.lastUpdatedField</code>	The field that is used to check if an LDAP record has been updated since the most recent sync.	<code>creationdate</code>
<code>ldap.userGroupMember^</code>	The field that maps a user to a group. This is a user attribute.	<code>memberOf</code>
<code>ldap.userDN^</code>	An RDN (relative to the baseDN) which contains users to sync to SBS.	<code>ou=People</code>
<code>jive.sync.user.ldap</code>	The property that specifies whether user synchronizations are enabled.	<code>true</code>
<code>jive.sync.relationships.ldap</code>	The property that specifies whether user relationships are synchronized from LDAP.	<code>false</code>

Property	Meaning	Sample Values
<code>jive.sync.profile.ldap.photo</code>	The property that specifies whether profile photos are synchronized from LDAP.	<code>false</code>
<code>jive.sync.profile.ldap.login</code>	The property that specifies whether profiles are synchronized at login.	<code>false</code>
<code>jive.sync.auto.disable</code>	The property that specifies whether Jive should disable user accounts which cannot be found in the LDAP directory.	<code>true</code>
<code>jive.sync.auto.disable.att.name</code>	The name of the attribute which indicates whether or not an account is disabled in LDAP.	<code>userAccountControl</code>
<code>jive.sync.auto.disable.att.value</code>	In Active Directory, UserAccountControl flags. For reference for setting user account properties, see Microsoft article 305144 ( <a href="http://support.microsoft.com/kb/305144">http://support.microsoft.com/kb/305144</a> ). You can also set up a bit-specific filter such as: <code>userAccountControl:1.2.840.113556.1.4.803:=2</code>	<code>514</code>
<code>jive.usernames.case.insensitive</code>	The property that specifies if case sensitive comparisons are made when users register or log in. If this is set to <code>false</code> , sensitive comparisons are enabled; for example, <b>bbrag</b> is a different user than <b>BBragg</b> . If this is set to <code>true</code> , there is no distinction between <b>bbragg</b> and <b>BBragg</b> . You may need to set this property to <code>false</code> when existing usernames in your Lightweight Directory Access Protocol (LDAP), Active Directory (AD), or Single Sign-On (SSO) are case sensitive.	<code>true</code>
<code>GroupManager.className</code>	The property that controls whether or not permission groups are synchronized from LDAP.	<code>com.jivesoftware.base.ldap.LdapGroupManager</code> (for LDAP groups) <code>com.jivesoftware.base.database.DbGroupManager</code> (default group manager)

## Jive security

Jive security and privacy features are designed to meet the requirements of the most tightly regulated global industries and government agencies.

Jive Software makes every effort to protect the confidentiality, integrity, and availability of its cloud-based, hosted, and on-premise communities, as well as its cloud-delivered services. Jive Software continually evaluates the security of current and past product versions to protect your organization data. This section provides a brief overview of Jive security features and some suggestions about the configuration features you can use to protect your community and its information.

For more information about Jive security architecture and practices, see the [Jive Security whitepaper](#) on Worx. A more detailed version is available under NDA from your Jive account representative or [Support](#).

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**Note:** This security section only describes the Jive application. It does not describe the security features of third-party products that integrate with Jive.

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## In-product security features

Several built-in security features allow you to configure your Jive community for the appropriate level of security for your organization.

### Authentication features

#### Login security

By using the Admin Console, you can configure Jive to strongly discourage automated (computer-driven) registration and logins. Automated registration is usually an attempt to gain access to the application for malicious reasons. By taking steps to make registering and logging in something that only a human being can do, you help to prevent automated attacks. We recommend using the following tools, all of which are available as options in the Admin Console:

- **Login throttling:** You can enable login throttling slows down the login process when a user has entered incorrect credentials more than the specified number of times. For example, if you set the number of failed attempts to five and a forced delay to ten seconds and a user fails to log in after more than five attempts, the application would force the user to wait 10 seconds before being able to try again.
- **Login captcha:** You can enable login captcha displays a captcha image on the login page. The image displays text (distorted to prevent spam registration) that the user must enter to continue with registration. This discourages registration by other computers to send spam messages.

The login captcha setting is designed to display the captcha image when throttling begins. After the number of failed attempts specified for throttling, the captcha image is displayed and throttling begins. You cannot enable the login captcha unless login throttling is enabled. The captcha size is the number of characters that appear in the captcha image, and which the user must type when logging in. Good value for this is six, which is long enough to make the image useful, but short enough to make it easy for real humans.

- **Password strength:** You can enforce strong passwords by using the Admin Console. The following options are available:
  - A minimum of 6 characters of any type
  - A minimum of 7 characters including 2 different character types (uppercase, lowercase, number, punctuation, and special characters)
  - A minimum of 7 characters including 3 different character types
  - A minimum of 8 characters, including all 4 character types

For more information, see [Configuring login settings](#) on page 142, [Configuring password update settings](#) on page 128, and [Configuring self-service user registration](#) on page 138.

- **Two-factor authentication:** *Two-factor authentication* (2FA) adds a second step to the user authentication procedure used to make sure that the person trying to gain access to the community is the actual user. For more information, see [Two-factor authentication](#) on page 144.

### Session timeout

By default, Jive passes a token that persists the user session for 30 minutes from the last request. If you have a specific need to modify this limit (for example, if you need to make your Jive session timeout match the timeout of your identity provider when configuring SSO), you can use the `auth.lifetime` system property to set a new session timeout period in minutes. Note that increasing session duration increases security risks, such as session hijacking and unattended workstation tampering. You should consult your organization security team before you modify this value.

### Email validation

You can configure Jive to require email validation for all new accounts. This setting helps to prevent bots from registering with the site and then automatically posting content. When you configure email validation, Jive requires a new user to complete the registration form and retrieve an email with a click-through link to validate their registration. For more information, see [Configuring self-service user registration](#) on page 138.

### Account lockout

Jive does not offer account lockout as an out-of-the-box feature. However, you can configure Jive to authenticate against a third-party SSO that performs account lockout.

### SSO

Jive includes support for SAML out of the box and can also be implemented as customization from Jive's Professional Services team, a Jive partner, or an engineer of your choice. For more

information, see [Getting ready to implement SAML SSO](#) on page 68.

**Delegated authentication** When delegated authentication is enabled and configured, Jive makes a web service call out to the configured server whenever a user attempts to log in. This allows administrators to control the definition of users outside of the community. For more information, see [Configuring Delegated Authentication](#).

## Authorization features

Jive includes powerful built-in user and administrator permissions matrices, as well as customizable permissions. Depending on the assigned role, users can see or not see specific places and the content posted there. In addition, administrative permissions can be used to limit the access level of administrators. Jive administrators control user and administrative permissions by using the Admin Console. For more information about permissions, see [Managing permissions](#) on page 371.

## Moderation and abuse features

**Moderation** Jive administrators can enable moderation so that designated reviewers view and approve content before it is published in the community. This can be useful for places that contain sensitive information. In addition to content moderation, administrators can enable moderation for images, profile images, avatars, and user registrations. For more information, see [Moderation](#).

**Abuse reporting** Administrators can enable abuse reporting so that users can report abusive content items. For more information, see [Setting up abuse reporting](#) on page 358.

**Banning users** Administrators can block a person's access to Jive so that they are no longer able to log in to the community. For example, if someone becomes abusive in their messages (or moderating their content is too time-consuming), administrators may choose to ensure that the user can no longer log in or post comments. Users can be banned through their login credentials or their IP address. For more information, see [Configuring banning](#) on page 149.

**Interceptors** Interceptors can be set up to perform customizable actions on incoming requests that seek to post content. Administrators can set up interceptors to prevent specific users from posting content or to filter and moderate offensive words, anything from specific IP addresses, or the posting frequency of specific users. For more information, see [Interceptors overview](#) on page 121.

## Encryption

**HTTPS** HTTPS encryption is required for running Jive. Jive supports TLS 1.0 and up.

**Encryption at rest** Encryption at rest is available to North American customers as an addition.

## Encryption key management

Jive utilizes the [AWS Key Management Service](#) to store all encryption keys. This option is employed by default for Hosted customers. And On-Premise customers can use their own accounts to leverage AWS KMS service.

KMS has the following benefits:

- Built-in auditing: All API calls to KMS are logged and provide details about when keys were accessed and who accessed them.
- Secure: KMS provides a secure location to store and use encryption keys, using hardened systems where unencrypted keys are only used in memory. KMS keys are never transmitted outside the AWS regions in which they were created.
- Compliance: Security controls in AWS KMS have been validated and certified by a number of compliance schemes.

For additional information, see [AWS Key Management Service](#), [AWS Services in Scope by Compliance Program](#), and [AWS Key Management Service Cryptographic Details whitepaper](#) on the Amazon Web Services portal.

## Cookies

Jive uses HTTP cookies in several places in the application to provide a better user experience. For more information about how the application uses cookies, see [Cookies in Jive communities](#) on page 256.

## More options

The Jive Professional Services team can deliver security customizations if the out-of-the-box security features do not meet the specific requirements of your organization.

## Antivirus feature

*The antivirus feature helps make your community more secure. With the antivirus feature enabled when a user tries to upload an external file to the community (for example, a Microsoft Word document or an Adobe PDF), the file is scanned for a virus before being posted. If a virus is found, the file will not be posted in the community.*

The antivirus feature is powered by ClamAV (<http://www.clamav.net/>). Jive polls the ClamAV database every thirty minutes for virus updates.

You can enable the antivirus feature themselves.

## Enabling antivirus feature

To enable the antivirus feature:

- In the Admin Console, go to **System > Settings > Antivirus**, and select **Enable**.
- Click **Save**, and then refresh the browser page to populate the **Virus Scanner URI** field from Tenancy Services.



- Under **Notify Author**, select **Yes** if you want the application to send the author an Inbox and email notification when a file is rejected. You can also designate an administrative group of users to receive a notification.
- Under **Scan Timeout**, set the timeout in milliseconds for the antivirus scanner to complete a scan. The default is 300,000 milliseconds.
- Click **Save**.

## Cookies in Jive communities

Jive uses HTTP cookies in several places in the application to provide a better user experience. All cookies are necessary for Jive to function properly and it does not support selective acceptance of cookies.

### Overview

- Jive does not set third-party cookies as part of the core product offering. However, it is possible for you to configure the application so that third-party cookies are set. For example, you can configure the application to use a web-tracking tool such as Google Analytics, each of which may set a third-party cookie. For the list of the potentially added cookies, see [Third-party cookies](#) on page 261.
- Jive does not set the `domain` attribute of an HTTP cookie.
- Out of the box, Jive is configured to send only allowed, secure cookies. If your installation is not using secure cookies for some reason, see [Setting up secure cookies](#) on page 256.
- All Jive cookies that are set by the server and not via the client or browser have the `HttpOnly` flag.

---

**Note:** Except where noted, none of the following cookies contains user-identifiable information. This behavior meets European Union privacy laws.

---

### Setting up secure cookies

Out of the box, Jive sets the `secure` attribute for cookies that should only be sent via HTTPS connections. If your installation is not configured this way, you can configure Jive to send only allowed, secure cookies.

---

**Fastpath:** **Admin Console: System > Management > System Properties**

---

1. In the Admin Console, go to **System > Management > System Properties**.
2. Set the Jive system property `jive.cookies.secure` to `true`.  
This results in all Jive-specific cookies (not including `JSESSIONID`) having the `secure` attribute set on the cookie.
3. Configure both Apache and Tomcat to only allow HTTPS connections. For more information on the configuration, see [Configuring SSL on load balancer](#).
4. Configure Tomcat with the `secure` attribute set to `"true"` in the `server.xml` configuration file, specifically the `server/connector` element.



---

**Note:** Except where noted, none of the following cookies contains user-identifiable information. This behavior meets European Union privacy laws.

---

	anonymous	authenticated
Used only by the Gamification module		
authenticated or not.		

- |                    |   |
|--------------------|---|
| <b>BIGipServer</b> | Cookies prefixed with <code>BIGipServer</code> traffic, and contain encoded addresses. These addresses are strictly internal and connect to internal servers from the host of the cookie does not have any effect. For more information on these cookies, see the Overview of BIGIP cookies article on the F5 Support Center: <a href="https://port.f5.com/kb/en-us/solutions/public/100/000/article.html">port.f5.com/kb/en-us/solutions/public/100/000/article.html</a> |
|--------------------|---|

<b>clickedFolder</b>	<p>This cookie is used in the Admin Console to indicate the closed status of the current folder and the visible portions of the Admin Console.</p> <ul style="list-style-type: none"> <li>• Possible values: String, <code>true</code>, or <code>false</code></li> <li>• Expiration: At session end</li> <li>• Encryption: None</li> <li>• Example: <code>clickedFolder="true"</code></li> </ul>
----------------------	--

- |                                |  |
|--------------------------------|--|
| <b>highlightedTreeviewLink</b> | <p>This cookie is used in the Admin Control Panel to store the selected folder as used in various tree-view controls.</p> <ul style="list-style-type: none"> <li>• Possible values: Integer, the DOCTYPE of the selected folder</li> <li>• Expiration: At session end</li> <li>• Encryption: None</li> <li>• Example: highlightedTreeviewLink=1</li> </ul> |
|--------------------------------|--|

- | Cookie Name | Description   |
|-------------|---|
| jive-cookie | <p>This cookie is used in the Admin Console to store an encrypted username and password for authentication between two sites. The information is encrypted with AES 256 encryption, and then stored in the cookie.</p> <ul style="list-style-type: none"> <li>• Possible values: String, Base64 encoded username and password of the remote site</li> <li>• Expiration: At session end</li> </ul> |

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	<ul style="list-style-type: none"><li>• Encryption: Yes</li><li>• Example: <code>jive-cookie="YWFyb246MTMxNTU0NmZjhNjExZTdlMTcyMGZhYjVhNWNkNjI0Yg</code></li></ul>
<b>jive_default_editor_mode</b>	<p>This cookie is used on the front-end for guiding users who choose to use an editor mode or editor mode.</p> <ul style="list-style-type: none"><li>• Possible values: String, <code>advanced</code></li><li>• Expiration: 30 days</li><li>• Encryption: none</li><li>• Example: <code>jive_default_editor_mode="a</code></li></ul>
<b>jiveLocale</b>	<p>This cookie is used on the front-end for guiding users who choose a locale setting.</p> <ul style="list-style-type: none"><li>• Possible values: String, locale code</li><li>• Expiration: 30 days</li><li>• Encryption: none</li><li>• Example: <code>jiveLocale="en_US"</code></li></ul>
<b>jive.login.ts</b>	<p>This cookie stores the time stamp of the user.</p> <ul style="list-style-type: none"><li>• Possible values: Unix time in ms</li><li>• Expiration: At session end</li><li>• Encryption: None</li><li>• Example: <code>1387387736841</code></li></ul>
<b>jive.mobile.redirect</b>	<p>This cookie retains the user selection for opening Jive Daily Hosted app when using a mobile device supported for iOS devices only.</p> <ul style="list-style-type: none"><li>• Possible values: <code>web</code>, <code>native</code></li><li>• Expiration: 1 month</li><li>• Encryption: None</li></ul>
<b>jiveRegularLoginUserCookie</b>	<p>This cookie is used to auto-redirect the login authentication page (if the value exists and is true).</p> <ul style="list-style-type: none"><li>• Possible values: <code>true</code></li><li>• Expiration: One month</li><li>• Encryption: None</li></ul>
<b>jive.saml.passive.tried</b>	<p>This cookie is used to mark when SAML passive authentication has already been attempted.</p> <ul style="list-style-type: none"><li>• Possible values: <code>true</code></li><li>• Expiration: 3600 seconds (one hour)</li></ul>

**jive.security.context**

- Encryption: None
- Example: `jive.saml.passive.tried="true"`

This cookie is the authentication context for the user.

- Possible values: The user's encrypted session ID
- Expiration: 30 minutes unless refreshed. servlet container session timeout
- Encryption: AES 256
- Example: `jive.security.context="SdRwBLFy3Q==.MzA3OQ=="`

**jive.server.info**

This cookie is used on the front-end in conjunction with Content Distribution Networks (CDN), such as Akamai, to identify a user with a specific server (also known as a node).

- Possible values: String, a combination of `serverName`, `serverPort`, `contextPath`, `localName`, `localPort`
- Expiration: At session end
- Encryption: None
- Example: `jive.server.info="serverName=example.com:serverPort=443:contextPath=/host.localdomain:localPort=9001:localName=example.com"`

**jiveSSOLoginUserCookie**

This cookie is used to auto-redirect the SSO user to the authentication page (if the value exists and is not empty).

- Possible values: `true`
- Expiration: One month
- Encryption: None

**jiveTimeZoneID**

This cookie is used on the front-end for guests to identify users who choose a timezone setting.

- Possible values: String, timezone ID
- Expiration: 30 days
- Example: `jiveTimeZoneID="234"`

**jive.user.loggedin**

This cookie is used on the front-end in conjunction with Content Distribution Networks (CDN) to denote the user's request.

- Possible values: String, `true` if the current request is from a browser where the user is logged in
- Expiration: At session end
- Encryption: None
- Example: `jive.user.loggedin="true"`

**jive\_wysiwygtext\_height**

This cookie is used on the front-end to persist the editor window across sessions.

- Possible values: Integer, the height in pixels that the user chooses to expand the editor window
- Expiration: 1 year
- Example: `jive_wysiwygtext_height="500"`

**JSESSIONID**

This cookie is used on the front-end and back-end to identify a session. It is part of the Java Servlet specification described in <http://www.oracle.com/technetwork/java/javaee/servlet/index.html>.

- Possible values: String, the unique token generated by Tomcat
- Expiration: At session end
- Encryption: None
- Example: `JSESSIONID="1315409220832msB9E3A98AA1F2005E6"`

**linkedin\_oauth\_place\_info**

This cookie is used to communicate and authenticate with LinkedIn.

This cookie is used to temporarily store the OAuth information when a user is configuring a tile with a third-party system, such as Google Docs. The **Save** in the place template editing interface destroys the cookie.

- Expiration: After place template changes
- Encryption: None
- Example: `place_info="placetype%3A700"`

**skin.palette.preview**

This cookie is used to preview the site with the selected template.

- Possible values: ID (long value) of the template
- Expiration: 30 days
- Encryption: None
- Example: `skin.palette.preview="1001"`

**SPRING\_SECURITY\_REMEMBER\_ME\_COOKIE** This cookie is used on the front-end as part of the authentication process to denote whether or not a user has their credentials persist across sessions. It is defined in the Spring Security specification, as described in [source.org/spring-security/site/docs/3.0.x/reference/remember-me.html](http://source.org/spring-security/site/docs/3.0.x/reference/remember-me.html).

- Possible values: String, the Base64 encoded username, expiration time combined with an MD5 hex digest of password, expiration time, and private key
- Expiration: Defaults to 14 days

- Encryption: None. This is an MD5 hex hash.
- Example: `SPRING_SECURITY_REMEMBER_ME`  
`MxNTU4MjUzNTI3MDoyZDUyODNmZjhhNjExZT`  
`jI0Yg"`

## Third-party cookies

Third-party services attached to your instance may set their own cookies. You need to refer to their documentation for more information about these cookies.

## Google Analytics

The following Google Analytics cookies may set:

- `__utma`
- `__utmb`
- `__utmc`
- `__utmv`
- `__utmz`

For more information, see <https://developers.google.com/analytics/devguides/collection/analyticsjs/cookie-usage>.

## Jive Business Analytics (powered by Totango)

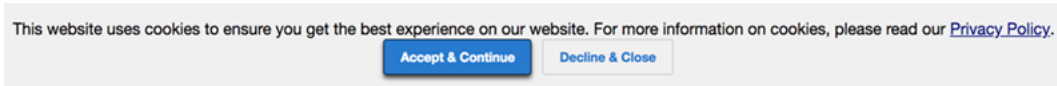
The following administrative cookies are added by the Jive Business Analytics service (an optional module) to the end-user browser to manage the state of the collection library. If you do not have Jive Business Analytics for your instance, these cookies will not be set.

<b><code>totango.org_attributes</code></b>	The list of attributes taken from the logged-in user profile, such as location and department.
<b><code>totango.user_attributes</code></b>	This cookie is empty.
<b><code>totango.org_name</code></b>	The username of the current user that is taken from the user's profile.
<b><code>totango.user</code></b>	The username of the current user that is taken from the user's profile.
<b><code>totango.org_dn</code></b>	This cookie is empty.
<b><code>totango.org_ofid</code></b>	This cookie is empty. It is used to optimize the events sent for collection to the Analytics service.
<b><code>totango.heartbeat.last_ts</code></b>	Time stamp (Unix time) of the last event collected.
<b><code>totango.heartbeat.last_module</code></b>	Stores the last-visited social place of the user.

## Configuring Cookie Consent banner

You can enable the Cookie Consent banner in your Jive community to ensure that users must first acknowledge the usage of the cookies before gaining access to it.

Here is how the Cookie Consent banner looks like:



**Fastpath: Admin Console: People > Settings > Cookie Consent Banner**

By default, the banner is disabled. However, you can enable it if required. For more information on cookies usage, see [Cookies in Jive communities](#) on page 256.

To enable and configure cookie banner settings:

- 1. In the Admin Console, go to **People > Settings > Cookie Consent Banner** .
- 2. To enable the Cookie Consent banner, select **Enabled**.
- 3. If required, in the **Privacy Policy URL**, specify the privacy policy page of your community.
- 4. Click **Save**.

With these settings enabled and configured, users see the cookie banner until they accept or decline cookie usage. If they decline, they are redirected to a blank page.

**Cookie Consent banner reference**

Here you can find the settings available for the Cookie Consent banner of your community.

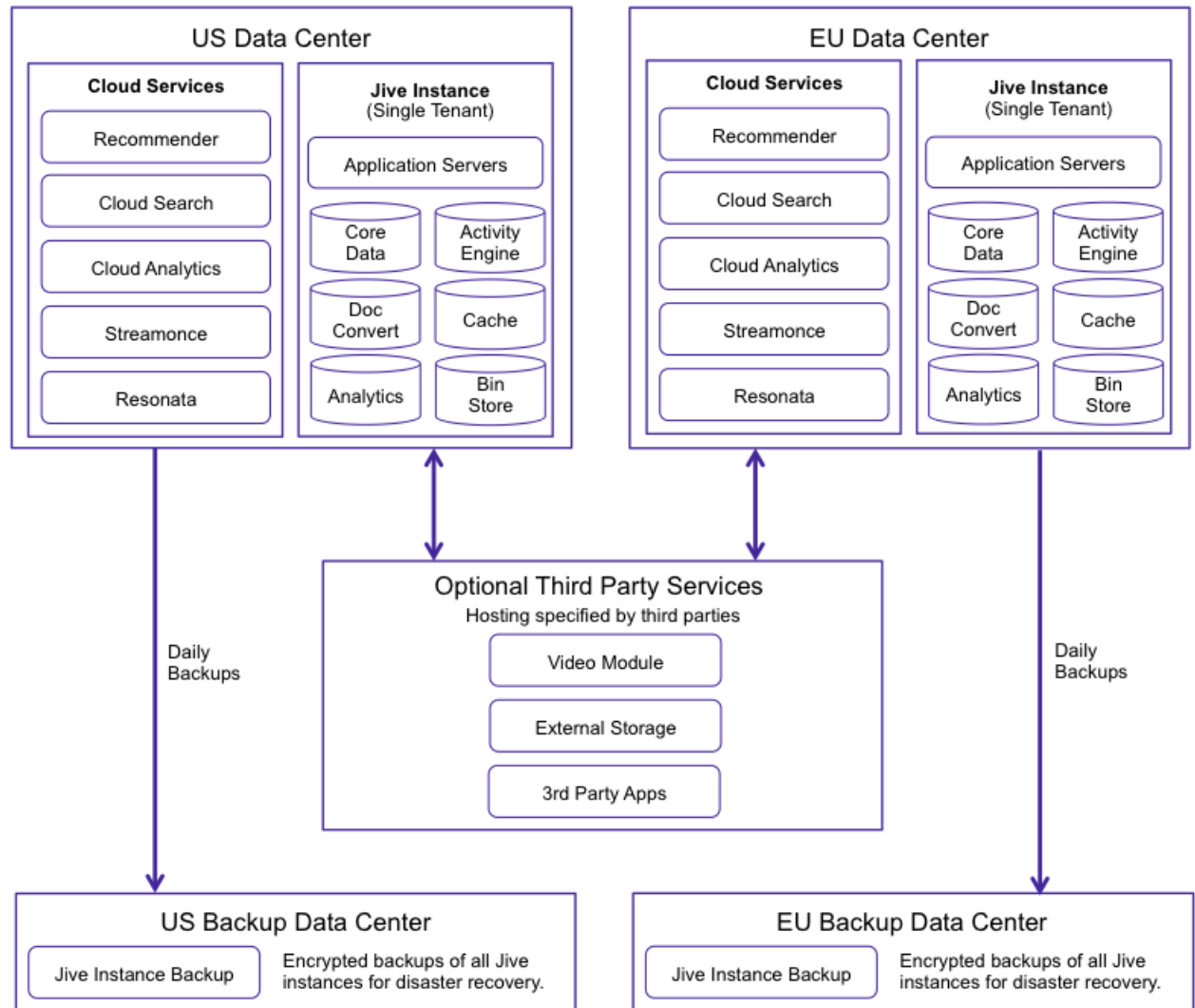
**Fastpath: Admin Console: People > Settings > Cookie Consent Banner**

Setting	Description
Enabled	With this setting enabled, Jive displays the cookie consent banner on all community pages. To continue using Jive, users would have to acknowledge it, and then click <b>Accept &amp; Continue</b> . If they click <b>Decline and Close</b> , the current Jive session ends, and they are redirected to a blank page.  With this setting disabled, the users would not know that your Jive community uses cookies.
Privacy Policy URL	A link to your Privacy Policy page to display in the banner.

**Security of cloud-delivered services**

A number of important Jive services, such as Search, Recommender, and Analytics, are cloud-delivered to your instance.

The architecture of these services is shown in the diagram below. For detailed information about how each service is secured, see the [public and NDA versions of the Jive Security whitepaper](#) Worx.



## Security recommendations

These security recommendations depend on your community-specific configuration.

**Caution:** Each community can be configured differently. Because of this, not all of these recommendations apply to all communities. If you have any questions about these recommendations, please contact your Jive Software representative.



Security recommendation	Description
Configure user login security	<p>Login security can include throttling, captcha, and password strength requirements.</p> <p>For implementation details, see <a href="#">Configuring login settings</a> on page 142 and <a href="#">Configuring self-service user registration</a> on page 138.</p>
Enable SSO	<p>An SSO solution can help you provide a consistent login experience for your users while providing identity management for your organization via a third-party vendor. Jive Software strongly recommends using a single sign-on solution for access to internal communities. In addition to the out-of-the-box SSO options in the application, our Professional Services team can create customizations to meet almost any single sign-on requirement.</p> <p>For implementation details, see <a href="#">Single Sign-On</a>, or, if you need an SSO customization, contact your Jive Software account representative.</p>
IP whitelisting	<p>IP address whitelisting is available for restricting access to either the entire site or just the Administration Console. You can also use whitelisting to restrict access to certain locations, such as corporate offices. To access this feature, contact <a href="#">Support</a>.</p>
Prevent spam in your community	<p>Everyone hates spam, and it can also present security risks. Limit it in your community as much as you can.</p> <p>For implementation details, see the following:</p> <ul style="list-style-type: none"> <li>• <a href="#">Spam prevention</a> includes several suggestions for dealing with spammers and preventing spam in your community, including a spam plugin that can connect to a third-party spam filtering tool.</li> <li>• <a href="#">Advanced spam prevention</a> includes using special serves for preventing spam.</li> <li>• <a href="#">Best Practices for Spam Management in Jive</a> on Worx. If you're a customer, we recommend joining this private group for useful community management content from Jive and fellow customers.</li> </ul>

Security recommendation	Description
Understand administrative permissions and how they work	Administrative permissions can be a powerful tool for limiting who can make changes to your community. For implementation details, see <a href="#">Managing System Administration permissions</a> on page 377 section.
Enable anti-virus checking	In your community, you can add a module that checks files for viruses before they can be uploaded to the community. For implementation details, see <a href="#">Antivirus feature</a> on page 255.  <b>Note:</b> This is an optional feature available as a module. For more information, ask your Jive account representative.
If higher data security is needed, enable Encryption at Rest	Jive's Encryption at Rest module is our recommended solution for customers who need additional encryption to meet their security requirements.  <b>Note:</b> This is an optional feature available as a module. For more information, ask your Jive account representative.

## Enabling unified communications

If you want your users to be able to connect to Jabber, WebEx, or Google Hangouts right inside the Jive interface by clicking through from hover cards or other locations where they want to invite collaboration, you can set up connectors for these applications in your community by using the Add-Ons and Apps functionality.

<b>Jive Connector for WebEx</b>	Lets your users easily create online meetings with groups of people in the community, as well as people outside of it.  For more information, see <a href="#">Jive Connector for WebEx</a> in the More Integrations Guide.
<b>Jive Connectors for Jabber</b>	Lets your users communicate with people in the community using voice or chat via the Jabber client. Contact points are associated with hover cards.  For more information, see <a href="#">Jive Connector for Jabber</a> in the More Integrations Guide.
<b>Jive Connector for Hangouts</b>	This add-on allows access to phone calls and video chats directly from your Jive community using Google Hangouts.

For more information, see [Jive Connector for Hangouts](#) in the More Integrations Guide.

### **Jive Connector for Skype for Business**

This add-on allows one-click access to voice calls and chats using Skype for Business and Lync as the clients.

For more information, see [Jive Connector for Skype for Business](#) in the More Integrations Guide.

For more information, see the [More Integrations Help](#).

## **Managing SEO in Your Community**

You can manage search engine optimization (SEO) to help your Jive communities rank better in web search engines by adding page-level redirects, using keywords in URLs, and describing images in alt tags.

These settings may be especially useful for externally facing communities.

### **Related links**

For other SEO-focused improvements, see [SEO Deep Dive](#) on Worx.

## **Configuring URL redirects**

You can configure redirects for the URLs that generally result in the 404 page-not-found error.

---

**Fastpath:** **Admin console: System > Settings > Redirection Rules**

---

With redirect configured, when a user tries to open a non-existing page, they are directed to a substituting page. Note that you can configure such redirects for content pages only, such as documents, discussions, and questions. You can add them as required, at the same time you don't need to edit the Apache configuration or restart your community when adding or removing them.

---

**Note:** The limit is 7,500 redirects per community. We also recommend that you use the Google Chrome browser because it performs much faster than FireFox when your community uses page-level redirects.

---

You cannot redirect the following community pages:

- Vanity URLs
- Home and other primary landing pages, such as `/welcome` and `/news`
- URLs with parameters
- System URLs, for example, maintenance pages
- Login pages

To configure redirection rules for content pages:

1. In the Admin Console, go to **System > Settings > Redirection Rules**.
2. In **Input URL (to match on)**, enter the URL of the page to be redirected.
3. In **Output URL (URL to redirect to)**, enter the URL of the page to be displayed when users navigate to the page you specified in Step 2 on page 267.
4. In **Redirection type**, select the type of redirect: 301 permanent or 302 temporary.  
We recommend that you use the 301 redirect for external-facing communities.
5. Click **Save**.
6. Repeat Steps 2 on page 267-Step 5 on page 267 for each page that must be redirected.

As a safety feature, each rule does not get executed more than once per request. For example, you cannot create an infinite loop by creating rules that redirect from A to B and B to A. Multiple rules can be executed for each request, for example, A to B and then B to C. The rules are checked in the order from top to bottom, so to execute a particular rule before others, you should move it to the top. All changes to the list take effect immediately.

## Best practices for URL redirects

You can prepare for understanding and using URL redirects in your community by avoiding both regular expressions and multiple hops.

- Whenever possible, redirects should be one-to-one and not cascade or contain more than one hop. Redirects which use multiple hops can impact web search crawlers and potentially impact your community performance.

An example a redirect with multiple hops is when URL-A redirects to URL-B which redirects to URL-C which redirects to URL-D.

- URL redirects in Jive do not permit the use of regular expressions (REGEX), including the use of wildcards.

## Improving SEO by adding keywords to URLs

With the feature enabled, the words from the Title field of the newly created content item are included in the URL of this content item. This change can improve SEO for external-facing communities.

---

**Fastpath: Admin Console: System > Settings > New Features**

---

Jive Cloud supports adding keywords to URLs from the 2016.2 version.

Keywords in URLs apply to the following content types:

- Documents
- Discussions
- Questions
- Ideas

- Events
- File uploads
- Polls
- Videos

Content that anonymous users can see has keywords in URLs, and all other content does not contain keywords in the URLs until it is published to a public location.

Content that cannot contain keywords in the URL includes:

- Content published only to specific users
- Content created in private, unlisted, or secret groups
- Hidden content (where you publish only to yourself)
- Spaces or subspaces with limited access

### Tips for keywords in URLs

<b>Adding keywords to existing content</b>	You can add keywords to the URL of an existing content item that meets the criteria by editing the content item and then saving it. After saving it, you see the keywords in the URLs.
<b>Editing the title</b>	The original keywords are always used in the title no matter how many times you edit the title. To change the original title and keywords in the URL, you would need to delete the piece of content and create a new one.
<b>URL integrity</b>	When a content item is updated after the feature has been enabled, and its URL changes to include keywords, links to the preceding URL continue to work.
<b>Keyword format</b>	<p>Case sensitivity: All words incorporated into the URL are lowercase</p> <ul style="list-style-type: none"><li>• Delimiter: A hyphen "-" is used to separate words, special characters, and numbers</li><li>• Delimiter exception: If a hyphen already exists in a keyword, such as in "non-existing," the existing hyphen is retained and no additional hyphen is added</li></ul>

### Enabling keywords in URLs

To enable keywords in URLs:

1. In the Admin Console, go to **System > Settings > New Features** .
2. Under **Keywords in Content URLs**, select **Enabled**.
3. Click **Save** to save the changes.

## Improving SEO with alternative text for images

You can improve SEO in your community by using alternative text in image tags.

Image descriptions that are contained in the `<alt>` (alternative text) tags enable both search engines and users who rely on assistive technologies, such as screen readers, to associate text with images.

When you insert an image in the text editor, you can add text to describe the image in the **Image Description** box. The limit for descriptions is 100 characters including punctuation marks and spaces. Also, the text is case sensitive.

Insert Image

×

From your Computer

From the Web

Select an Image

Maximum file size: 4 MB. Also, please note that images larger than 1920px wide or 1080px tall will be scaled to fit those limits in your content.

Choose File

spacetravel.jpeg

Image Description

Enter a description of your image to help people who cannot see it, and to improve its search-ability.

author, Ursula K. Leguin

Insert image

## Using Sitemap feature

The Sitemap feature is enabled by default in Jive communities so that web crawlers can more easily find and index a community's pages. You can turn off this feature or manually send a sitemap update to specific search engines.

---

**Fastpath:** Admin Console: System > Settings > Sitemap XML Settings

---

## Disabling the Sitemap feature

To disable the sitemap feature:

1. In the Admin Console, go to **System > Settings > Sitemap XML Settings** .
2. Clear the **Sitemap auto-submission enabled?** check box.
3. Click **Save**.

## Manually submitting a sitemap

To manually submit a sitemap:

1. In the Admin Console, go to **System > Settings > Sitemap XML Settings** .
2. In the **Search engine submission URLs** box, list the URLs of the search engines you want to send your sitemap.
3. Click **Save**, and then click **Send sitemap update**.

# Managing community

In this section, you can find tasks related to day-to-day community management.

## Managing places and pages

Spaces, social groups, and the blogs and projects associated with them give your site structure. You can use space hierarchies and specially designed place pages in your community to highlight the focus and function of different areas.

Note that you can create spaces and manage certain aspects of them in the Admin Console, but social groups are created and managed from the user interface.

## Jive places: spaces, groups, and projects

A place in Jive is essentially a container that houses all the collaborative content for a certain subject or team. There are three types of places: **Spaces**, **Groups**, and **Projects**. The differences between them can sometimes be confusing, so here're the basics of each one.

### Spaces

*Spaces* are built in a hierarchy, with the ability to have a network of multi-level sub-spaces underneath them. They also use permissions, set by community administrators, to define who can see and do different things in the space. Permissions get inherited by any sub-spaces unless they are customized for that space, so if a user can do something in one space, this user can do it in the sub-spaces as well (unless the permissions have been customized). Any type of content can be created in a space, unless it has been turned off for a particular space by community administrators. Due to their hierarchical nature, spaces are typically used to represent organizations and departments within a company, and other concepts that require a network of places linked together.



For more information about creating spaces, see [Designing space hierarchies](#) on page 350 and [Creating new space from Admin Console](#) on page 353.

## Social groups

*Groups*, or *social groups*, are isolated containers within a community; they have no ties to other places and cannot have sub-groups. Permissions are managed on a per-group basis by the original group creator or the admins selected for the group, or both. Groups can also house any type of content unless one or more is turned off by community administrators. Because they are a freely created containers, groups get used most often for topic-specific collaboration, rather than something general to a team. They also get used for collaboration between specific teams or different departments that often work together closely and rely on each other.

## Projects

*Projects* can only reside within a space or a group; they cannot stand alone. However, they can still house any type of content unless one or more is turned off by community administrators. Permissions get inherited from the place in which the project was created. Projects also get created with a Start Date and an End Date and come with additional titles on their pages that display the progress being made in the project (if the project administrator keeps them up to date). Projects are generally used for short-term projects, which users need to collaborate on and house the content for in a single area.

For more information, see [Using projects and tasks](#) in the User Guide.

## What to use

Use a space if you:

- Need to share information about your department, program or initiatives with the rest of the organization/larger audience
- Need to add permissions controlling who can create which kinds of content in your place
- Need to create a hierarchical set of places
- Need permissions for your place to be managed centrally

Create a group if you:

- Want to collaborate privately with your team or project team
- Want to invite individuals to collaborate, and don't need centrally managed permissions
- Want to invite people from outside the organization to access your place

## Comparison of place properties

	Spaces	Groups	Projects
Hierarchical?	Yes	No	No
Can be private?	Yes, via permissions	Yes, via group settings.	Depends on parent place

	Spaces	Groups	Projects
Access permissions	Defined in the Admin Console. Inherited by sub-spaces	Defined in group settings. No inheritance	Inherited from containing place. Not customizable
Create permissions	Defined in the Admin Console. Inherited by sub-spaces	Any user	Inherited from containing place. Not customizable
Content allowed	Any; may be customized or restricted, or both by community administrators	Any; may be customized or restricted, or both, by community administrators	Any; may be customized or restricted, or both, by community administrators
Best uses	Large-scale collaborative needs with sub-space ability, such as those of an entire department or office, or an expansive topic	Smaller-scale collaborative needs either by a specific audience or a more specialized topic	Short term area to collaborate on a finite topic

## Designing places

Here you can find general information about designing and managing places, including special place pages.

### Understanding pages in places

For a place, you can customize the available pages and how these pages look.

---

**Note:** To customize a place, you need to own the place or have the right permissions: *Manage community* (administrative permission) or *Manage Social Group* (social group permission).

---

Activity, Overview, and custom pages can be customized for every place in the community. The main difference in the customization means: Activity and custom pages use tiles, while Overview pages use widgets. Place templates, which are customized for specific kinds of collaboration, always use tiles. Tiles use newer technology and are mobile-optimized; widgets cannot be displayed on a mobile device. Note that if you disable the Overview page in a place, you can choose to add additional tile-based custom pages, which let you spread out your content over multiple tabs with less content (and thus better mobile usability).

## Activity and custom pages with tiles

Activity and custom pages are responsive in design. That's why you should use Activity or custom pages with tiles if:

- Your community heavily relies on mobile usage. In this case, you should also configure a community home page for mobile browser users. For more information, see [Creating mobile Home page](#) on page 49.
- The audience of your place heavily relies on mobile usage even if the community as a whole is not. For example, many sales teams operate remotely.
- Streamed content, such as a Chatter or Facebook stream, must be brought into your place from outside the community.
- Custom pages are available, adding up to five customizable pages with tiles to every place.

For more information about tiles, see [Using tiles](#) on page 297 and [Tile reference](#) on page 307.

## Overview pages with widgets

Even though we do not recommend that, you have the option to enable an Overview page when you're setting up a new place and widgets are enabled in your community.

Widgets are a legacy feature in Jive. Tiles present a better option for landing pages because they are responsive whereas widgets are not. No new development is being done on widgets.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community.

---

Widgets are disabled by default, but you can activate the Overview page or check to see if you have one by navigating to **gear icon > Settings > Advanced Options** and selecting **Overview page**.

Using an Overview page with widgets:

- You are configuring a community home page for desktop users: it supports only widgets. For more information, see [Designing Home page of your community](#) on page 43.
- You need to take advantage of the customer service widgets set.
- You have an Overview page you created in an earlier version of Jive, and you're not ready to change the look and feel of the place.
- Your community or the audience of your place doesn't rely heavily on mobile usage.

## Planning customized community pages

There are several locations in Jive where you can customize a page with images and information, by using either tiles or widgets as building blocks.

You can customize pages in the following locations:

- The **News page** of the entire community. For more information, see [Customizing News page](#) on page 31.
- The **Home page** of the entire community, if it is enabled. For more information, see [Designing Home page of your community](#) on page 43.
- The **Your View page**, if it is enabled in your community. For more information, see [Disabling or enabling Your View feature](#) on page 89.
- The landing page of a place: an **Activity page** or an **Overview page** (place widgets must be enabled). For more information, see [Designing activity and custom pages for places](#) on page 275 and [Designing Overview pages for places](#) on page 329.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

- A **custom page** added to a place if Pages are enabled in your community and the Overview page has been disabled for the place. For more information, see [Adding custom pages to places](#) on page 276.

Tiles and widgets like content blocks help you lay out certain pages in your community. Tiles are the default way to do this, but if you have widgets enabled, you can choose them instead. Use the following table to determine which model is available for you to use. For more information, see [Using tiles](#) on page 297 and [Adding Overview page](#).

The following table shows where you can use tiles, and where you can use widgets.

Page	Tiles	Widgets
Community Home Page		
Your View		
Place: Activity page		
Place: Overview page		
Place: Custom pages		

## Changing banners and images for places

You can further customize a place by changing its banner, or just changing the main place image.

You need to be able to edit a place to change the banner and image of a place.

To change the banner and image of a place:

1. Go to your place, and then select **Manage > Setting**.
2. To change the place image, click **Place image**, then browse and open an image.

The image is uploaded and set as the place image.

3. To change the place banner, do the following:

a) Click **Banner Design**.

b) In the dialog box, select a preset banner by clicking **Preset** and choosing one, or click **Custom** to make your own.

For a custom banner, you can upload a new banner image and set the text color and background.

The changes are applied immediately.

c) If required, click **Reset to Previous** under **Custom** to revert to the last saved banner.

d) When you finish banner configuration, click **Close** to save the banner.

4. Click **Save** to save the page changes.

The place opens for viewing with the updated banner and image.

### **Designing activity and custom pages for places**

To customize a space, group, or project with a preconfigured set of content options designed for specific collaboration goals, you can use your Activity page as the landing page, and then apply and configure a place template.

An Activity page shows a real-time activity stream of updates happening in the place, such as status updates and replies to content.

Place templates are the starting point for setting up an Activity page: each template contains an activity stream, plus a configurable group of tiles that reflect common collaboration goals. When you edit an existing place, create a group, start a project, or (if you have permission) create a new space, you can choose a temple from a list of pre-designed place templates. You need to quickly set up a few essential tiles to start collaborating in reality-tested environments such as:

- An Event Planning place for organizing the material for an upcoming event
- A Vendor Collaboration place for partnering with external talent
- A private Pre-Hire Collaboration place for discussing potential job candidates

When you use a place template, you can add or remove any tiles and move them around within the layout. Tiles are visual building blocks of information. They may dynamically pull data either from around your Jive installation or a third-party service, or they may be configured with the information you've hand-selected.

### **Setting up custom pages in places**

When custom pages are enabled, place owners or users with *Manage community* or *Manage Social Group* can add pages to a place.

---

**Fastpath: Admin Console: System > Settings > Pages**

---

When you add a new page, it becomes available as a link in the place navigation menu, next to the existing links, such as Content, Activity, and People. These links can be re-ordered.

To enable custom pages in places:

1. In the Admin Console, go to **System > Settings > Pages** .
2. Select **Enabled** to enable custom pages.
3. Under **Page Limit**, specify the number of pages you want place owners to be able to add to their places. By default, the maximum is five.
4. Click **Save**.

With this feature enabled, place owners can see the **New Page** option under the gear icon menu and create custom pages.

#### ***Adding custom pages to places***

If you are a place owner, you can add your own custom pages to a place to allow more flexibility in designing places for specific needs. For example, you might add a Product Schedule page that shows your upcoming shipping dates and product owners.

For communities with widgets enabled, you need to set the place to Activity + Pages to see this option. For more information, see [Adding Overview page](#).

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

You can add a new page to your place to spotlight and organize content in that place. Once you add a page, you populate it with tiles tailored for that place. For example, you may want to dedicate a page to one important document by using a Document Viewer tile, or you may want to add a creative flair to your place by using an HTML tile.

You need to be able to edit a place to add tiles to Activity and custom pages.

---

**Note:** Your community manager determines the number of custom pages you can add to a place. The default number is five.

---

To add a new custom page to your place:

1. In your group, click **Manage > New page** .
2. In the **Create a page** dialog box, enter a name for your page.
3. Select the column layout you want for the new page.
4. Click **OK**.

The page opens for editing.

5. Add and configure the tiles you want to appear on the new page.

You must add at least one tile.

6. Click **Save**.

New pages appear first in the place navigation menu.

- To make changes to your page, go to the page and click the **Gear icon > Edit page**.

---

**Attention:** If you enable widgets and reset the place pages to Overview or Activity + Overview and save that change, you'll no longer see the new page you just created. However, if you then *reset* the navigation to Activity + Pages and save that change, you'll see your custom page again. You don't actually lose any new pages you have created if you change the place pages. You just don't see them when the place pages are set to Overview or Activity + Overview.

---

### **Applying place templates**

When you apply a place template to an existing project, space, or group, you get a preconfigured Activity page that contains the tiles and layout included in the template.

Applying a place template to a place only affects the Activity page in that place. It changes the selection of tiles on the Activity page and the order in which they're displayed.

---


: When you apply a new place template to a place whose tiles have been configured, you lose all configuration in the tiles. For example, if you created a People list, it will be wiped out and replaced with empty, unconfigured tiles, even if the place template includes a People tile. The exception is that Salesforce authentication persists if you apply a different place template that uses a Salesforce connection.

---

To apply a new Place Template to an existing place:

1. In your place, click the **Manage > Settings** to open the Activity page for editing.
2. Click **Browse Templates** in the upper left corner of the page.
3. Choose a place template for this place.

Place templates determine what tiles and streams provide the layout and data for your group's Activity page. You should choose the one that's right for the kind of collaboration that is planned to happen in your place. For more information, see [Place template reference](#) on page 284.

4. Click **Apply Template**, and then confirm your decision.
5. To configure the existing tiles, do the following:
  - a) Click  on the tile and configure it.
  - b) Click **Apply** in the tile dialog box.
6. To add a new tile, click **Add a tile**, then select the tile and configure it.
7. Click **Save** to update the place with your changes.

The Activity page that is based on the applied template is configured for your place.

### **Adding tiles to Activity page**

You can use tiles to display specific information that you want the visitors to see in a place. Here you can find how to add tiles to the Activity page of a place.

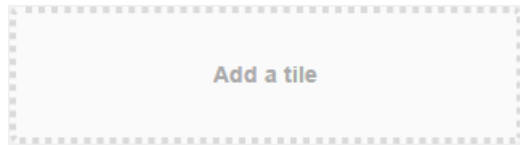
You need to be able to edit a place to add tiles to Activity and custom pages.



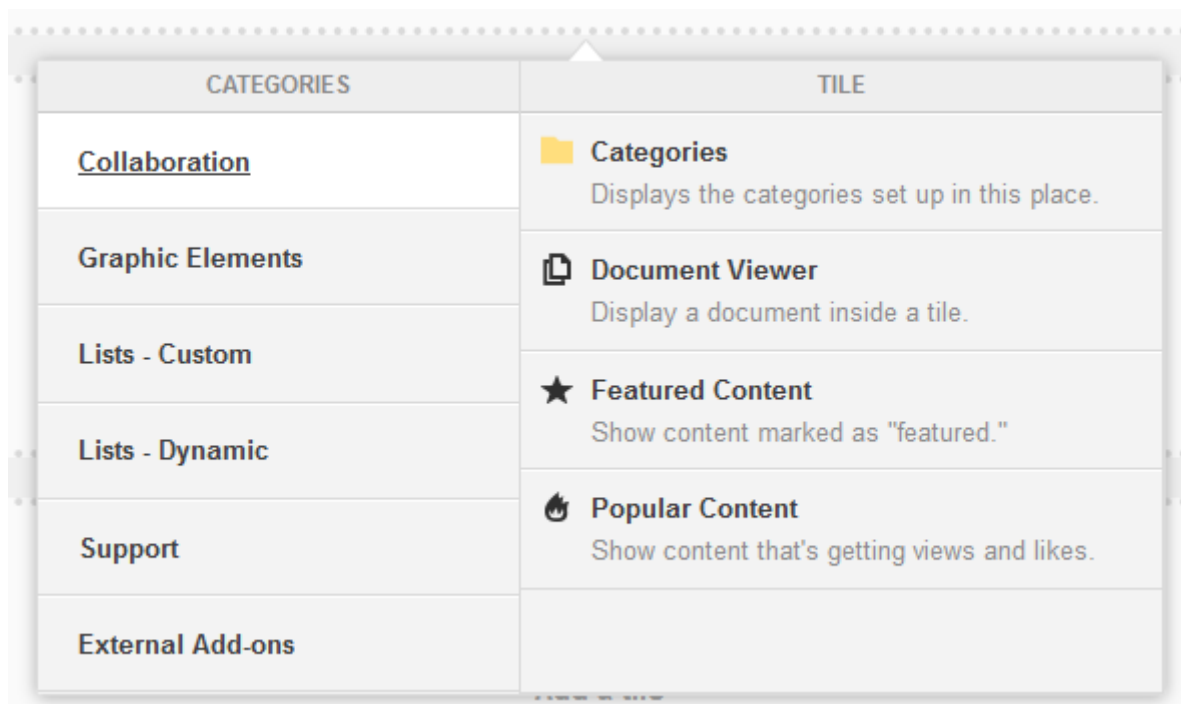
Tiles display useful information on Activity and custom pages of a place. For more information about tiles, see [Using tiles](#) on page 297 and [Tile reference](#) on page 307.

To add tiles to the place Activity page:

1. In your place, click the **Manage > Settings** to open the Activity page for editing.
2. Click **Add a tile**.



3. In the dialog box, select a category on the left, and select the tile that you want to add on the right.



---

**Note:** Note that the list of tiles that appears for selection is different for wide and narrow columns respectively. Once added, these tiles can be moved vertically within the same column or removed within the layout as required.

---

4. If required, configure the tile by clicking the gear icon at the upper right corner of the tile and adjusting the tile parameters, and then click **Apply**.

The tile is added to the page.

5. If required, adjust the tile position in the layout column by using the arrows in the upper right corner of the tile.
6. Click **Save** to save the page changes.

The Activity page opens with the tiles you set up for the page.

### ***Adding tiles with external stream integrations to Activity page***

External stream integrations are available along with tiles on your place Activity page. You can configure the Activity page to display information from the external streams.

External stream integrations display information from external systems, such as a Facebook stream. Note that a relevant add-on must be installed and configured in the community. For example, to receive information from a Facebook stream the Facebook add-on must be installed in the community.

You need to be able to edit a place to integrate external streams into the Activity page.

To integrate external streams to tiles on the place Activity page:

1. In your place, click the **Manage > Settings** to open the Activity page for editing.
2. Click **External File Storage**.
3. Select external stream integration that you want to add.
4. If necessary, configure the tile. The settings depend on the external stream you want to add.
5. Click **Save** to save the page.

The tile displays information from the external stream.

### ***Adding tiles to custom pages***

You can use tiles to display specific information that you want the visitors to see in a place. Here you can find how to add tiles to the custom pages of a place.

You need to be able to edit a place to add tiles to Activity and custom pages.

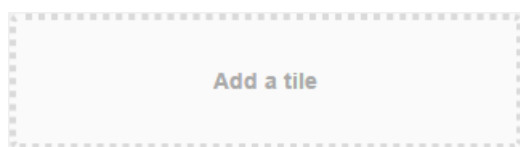
Tiles display useful information on Activity and custom pages of a place. For more information about tiles, see [Using tiles](#) on page 297 and [Tile reference](#) on page 307.

To add tiles to a custom page:

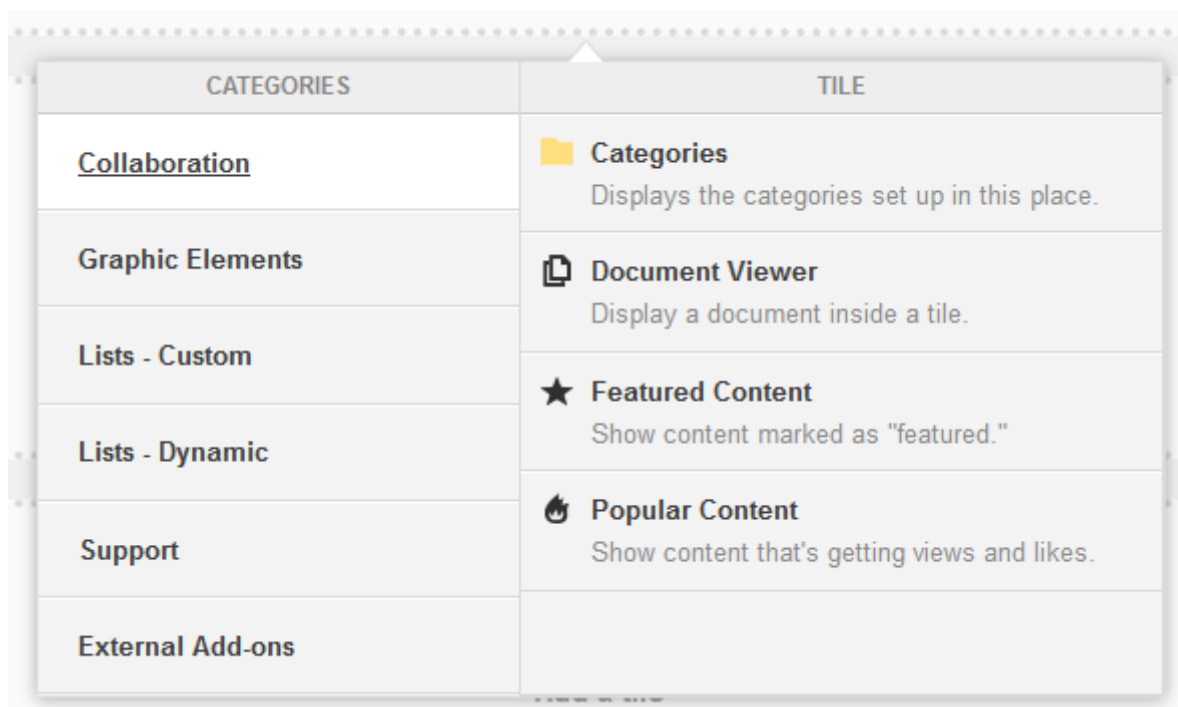
1. In your place, click the **gear icon > Edit <page title> page**.

The custom page you selected opens for editing.

2. Click **Add a tile**.



3. In the dialog box, select a category on the left, and select the tile that you want to add on the right.



---

**Note:** Note that the list of tiles that appears for selection is different for wide and narrow columns respectively. Once added, these tiles can be moved vertically within the same column or removed within the layout as required.

---

4. If required, configure the tile by clicking the gear icon at the upper right corner of the tile and adjusting the tile parameters, and then click **Apply**.

The tile is added to the page.

5. If required, adjust the tile position in the layout column by using the arrows in the upper right corner of the tile.
6. Click **Save** to save the page changes.

The custom page opens with the tiles you set up for the page.

### ***Managing page navigation in places***

You can rearrange the custom pages if they are enabled. But you can't change the order of the predefined pages.

You need to be able to edit a place to manage place navigation.

To reorder links to custom pages in the place navigation menu:

1. In the place, open a custom page and then click **Edit page**.
2. To reorder custom pages, drag and drop the page lines to where you want to see them on the place navigation menu.
3. Click **Save** to save the changes.

### ***Creating a new place template***

You can create a new place template based on a currently configured place. Custom pages are not saved within the new template.

You need to have rights to edit a place to save it as a template.

---

**Fastpath: Place > Manage > Save as new template**

---

If you want to create a new place template, you can base one on the tiles included in an existing place you've configured and saved. For example, if you create a group by using the General Collaboration template, but add and delete some tiles to include different information in that group, you can use **Save as new template** to save the layout of the tiles as a Place Template. Then you can apply that template to other places you create.

---

**Note:** If you have Community Manager rights, you can save place templates as community templates so that other people in the community can use them. Alternatively, only you can see your saved templates in Your Templates.

---

A template saves the type, order, and layout of tiles for a place. It does not save the configuration of those tiles. If you've created lists of links using the Helpful Links tile, for example, and saved a template based on that place, places with that template applied will have the Helpful Links tile in the same position. But they will not include the link list you created. This is true even if you later reapply that template to the same group.

To create a template based on an existing place:

1. In your place, click the **Manage > Settings** to open the Activity page for editing.
2. Change the tiles until the layout looks the way you want.

For more information, see [Adding tiles with external stream integrations to Activity page](#) on page 279.

3. Click **Save** to save them to the current template.

---

**Note:** Custom pages you add are not saved within the template.

---

4. Click **Gear icon > Save as new template** and specify a name and description for the new template.

This option becomes available only if you have customized the current template.

5. Provide a name and tags for the new template.

Tags are used to populate the Similar Places tile.

6. Click **Save**.

The new template is saved, and you can see it under Your Templates when browsing place templates.

### ***Saving place templates globally***

If you have community manager rights, you can save a Place Template for other users to apply when they set up places.

Community managers can save customized place templates as global page templates. These templates appear in the Community Templates list when place owners are selecting a place template to use. New templates are based on the configuration of an existing place.

To set up a new global place template:

1. Go to the Activity page of the place you want to base the template on. Make sure the tiles and layout are customized the way you want them.
2. Select **gear icon > Save as community template**.
3. In the **Save as a new global template**, provide a name, description, and tags for the new template, and select the category to which the template applies.

Tags are used to populate the Similar Places tile.

4. Click **Save** to save the changes.

### ***Deactivating place templates***

If you want to limit the templates community users can select, you can activate and deactivate them in the template browser.

You may want to make some templates unavailable to your users. This prevents users from selecting the template from now on but doesn't remove the template from any places where it's already in use.

---

**Note:** You need to have community manager rights to deactivate global place templates.

---

To make templates unavailable to users:

1. Navigate to a place.
2. Click **Manage > Settings**.
3. Click **Browse templates** at the top of the place.
4. Select a template.
5. Next to the template description, click **Deactivate this template**.
6. Click **Save**.

The template is deactivated and not available for creating places.

To reactivate a deactivated template, you must select **Reactivate this template** while browsing it. You won't be able to apply the template until you have reactivated it.

### ***Managing template categories***

You can manage the categories of templates that are available when creating places, and create your own categories for displaying new templates.

---

**Fastpath:** **Admin Console: Add-ons > Place Template Management**

---

You may find that you don't want to make the full range of templates available to users who create places, or you may have created templates of your own that you'd like to organize in categories when they're displayed in the UI. You can use the Admin Console to create new categories for templates and to hide template categories that you don't want users to see.

To manage template categories:

1. In the Admin Console, go to **Add-ons > Place Template Management**.
2. To create a new category, click **Add a category** and type the name in the list.

The number of visible template categories is limited.

3. To hide a category from users who are creating new places, including all the templates it includes (unless they're also in another category), click **Hide Category**.

Hiding a category does not affect places that have already been created. Places that are already using templates in a category you've hidden will still use them, but they won't be selectable to users who are creating or modifying a place.

For example, hiding the Marketing template category will hide all the templates that are unique to that category, and users won't see the Marketing template as an option when they're adding templates. However, they'll still see the Customer 360 template because it is also part of the Sales category. You might find the place template reference ([Place template reference](#) on page 284) helpful when managing template visibility.

4. To delete a category from the list (and make it invisible to users who are creating and editing places), click **Delete Category** next to the template. The category is marked for deletion.

You won't be able to delete the built-in Jive categories, but you can still hide them if you don't want to use them.

5. When your list of categories is the way you want it, click **Save** to apply your changes.

The categories you selected are hidden or deleted, the new categories are created.

Note that hiding or deleting a category does not affect places that have already been created. Places that are already using templates in a category you've deleted can still use them, but they won't be selectable to users who are creating or modifying a place.

### ***Place template reference***

Each place template contains a selection of tiles customized for a specific collaborative activity, such as Sales or IT. Here you can find references for the templates to help you understand which templates you can access.

Templates are organized according to the kind of workgroup that typically uses them, but you can rename and customize any template. The right template contains more or less the tiles that you need. For example, if you want to set up a place to track items identified for quick follow-up, you could pick the Sales Answer Desk template when creating the place, even if Sales isn't your main goal. This template includes a Featured People tile to identify people you can direct questions to, tracks items marked for Action and recent decisions, and surfaces popular content.

For more information about creating place templates, see [Creating a new place template](#) on page 281. For more information about data tiles and the information they're based on, see [Place tile reference](#) on page 318.

It's possible to develop custom tiles that aren't included in the product, including tiles for third-party integrations. For the latest developer information and programming tutorials, see the Jive Developer portal at <https://developers.jivesoftware.com/>.

---

**Restriction:** If your community does not have additional modules enabled, you may not see some of the feature options that are listed and your options may be different.

---

General place template reference



General place templates are useful for general collaboration cases not focused on a specific business function, and can easily be used as the base for custom templates.

Place template	Tiles	Features	Default type	Default tags
TeamCollaboration	Top Participants Key Content and Places Featured Content Recent Decisions Finalized Content	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	—
Best Practices Sharing	Featured Content Popular Content Image Gallery Top Participants Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	best practice

Place template	Tiles	Features	Default type	Default tags
War Room	Gauge Finalized Content Action Items Top Participants Featured Content	Documents Discussions Status Updates (in groups only) Projects	Public	—
Customer 360	Gauge Featured Content Helpful Links Featured People Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	—

Corporate Communications place template reference

Corporate Communications place templates include selections of tiles focused on sharing videos, live events, communications planning, and blogging.

Place template	Tiles	Features	Default type	Default tags
Blog Central	Top Participants Featured Content Popular Content	Blogs Status Updates (in groups only)	Public	blogs
Communications Planning	Key Dates Featured Content Action Items Recent Decisions Finalized Content Image Gallery	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Private	corp comms
LiveEventActivity Streaming	Top Participants Key Dates	Documents Status Updates (in groups only)	Public	event, stream

Human Resources place template reference

Human Resources place templates include selections of tiles focused on HR team communications and pre-hire communication with future employees.

Place template	Tiles	Features	Default type	Default tags
Best Practices Sharing	Featured Content Popular Content Image Gallery Top Participants Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	—

IT place template reference

Information Technology (IT) place templates include selections of tiles focused on technology rollouts, helpdesk support, and upgrade planning.

Place template	Tiles	Features	Default type	Default tags
Best Practices Sharing	Featured Content Popular Content Image Gallery Top Participants Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	best practice
Technology Rollout and Support	Video (External) Featured Content Finalized Content Key Dates Helpful Links	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	technology

Place template	Tiles	Features	Default type	Default tags
IT Helpdesk Collaboration	Featured Content Popular Content Helpful Links Action Items Recent Decisions	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	helpdesk

Place template	Tiles	Features	Default type	Default tags
IT Upgrade Planning	Key Dates Action Items Featured People Helpful Links Image Gallery	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	it, upgrade
RFP Workgroup	Key Dates Popular Content Finalized Content Leaderboard or Top Participants Key Content and Places Gauge	Documents Discussions Status Updates (in groups only) Projects	Private	request_for_proposal, rfp

Marketing place template reference



Marketing place templates include selections of tiles focused on assembling marketing campaigns and collateral.

Place template	Tiles	Features	Default type	Default tags
Event Planning	Key Dates Featured Content Gauge Popular Content Recent Decisions	Documents Discussions Ideas Status Updates (in groups only) Projects	Private	event
Customer, Partner, or Vendor Collaboration	Key Dates Top Participants Helpful Links Finalized Content Action Items	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Private Externally-accessible	agency, customer, partner, vendor

Place template	Tiles	Features	Default type	Default tags
Campaign Planning	Top Participants Finalized Content Action Items Key Content and Places Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Private	assets, campaign
Customer Success Stories	Top Participants Featured Content Popular Content	Blogs Documents Status Updates (in groups only)	Public	success_stories, win

Research and Development place template reference

Research and Development (R&D) place templates contain selections of tiles focused on innovation and collaboration R&D organizations, including FAQ and vendor collaboration.

Place template	Tiles	Features	Default type	Default tags
Best Practices Sharing	Featured Content Popular Content Image Gallery Top Participants Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	best practice
R&D Planning	Action Items Popular Content Top Participants Recent Decisions	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	development, research

Sales place template reference

Sales place templates include tiles for information used to plan and close deals, including integrations with Salesforce.

Place template	Tiles	Features	Default type	Default tags
Sales Home	Popular Content Key Content and Places Video (External) Featured Content Featured People	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	sales
Sales Answer Desk	Popular Content Helpful Links Featured People Action Items Recent Decisions	Videos Discussions Blogs Documents Projects	Public	questions, sales

Place template	Tiles	Features	Default type	Default tags
RFP Workgroup	Key Dates Popular Content Finalized Content Top Participants Key Content and Places Gauge	Documents Discussions Status Updates (in groups only) Projects	Private	request_for_proposal, rfp

Place template	Tiles	Features	Default type	Default tags
Competition	Featured People Top Participants Featured Content Popular Content Key Content and Places	Documents Discussions Blogs Status Updates (in groups only) Projects	Private (unlisted)	competition
Customer 360	Gauge Featured Content Helpful Links Featured People Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates (in groups only)	Public	—

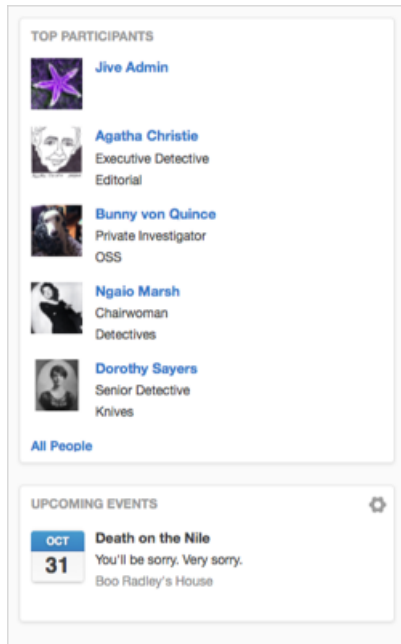
## Using tiles

Tiles display useful information in Activity and custom pages for places, News page, and Your View pages.

- You have plenty of options to choose from when adding a tile to a place. Look through the categories to see all of your options. For more information, see [Tile reference](#) on page 307.

Two useful tiles that you can choose are the Top Participants and Upcoming Events tiles:

**Figure 9: Example of tiles**



- Different tiles are available in different places. Activity and custom pages, News, and Your View all have different tile options.

---

**Note:** If you own the place, you can choose whether or not to show these default tiles, and you can also add different tiles.

---

- You can use a tile as is or customize it to display specific information. For more information, see [Designing activity and custom pages for places](#) on page 275.

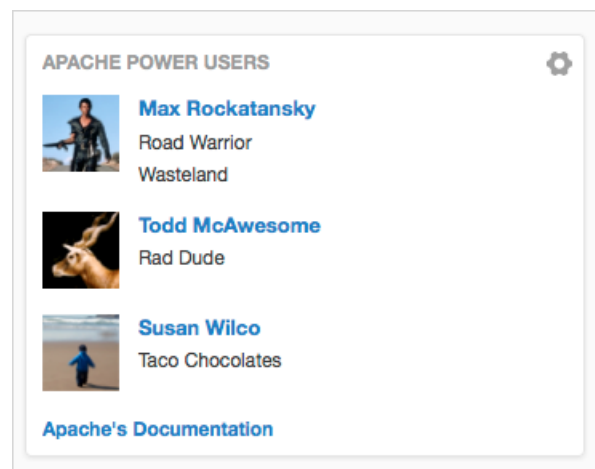
### ***Creating Custom tiles***

Custom tiles can include links to helpful content, people, and places in your community, and links external your community.

If you are a place owner, you can create custom tiles that include a list of links to helpful content, people, and places in your community, and to links outside your community. Your custom tiles are available to all of the places that you own. Community managers can create custom tiles and make them available to all places in the community.

A custom tile provides links to content, people, or places. For example, a custom tile might be helpful for an HR group to list all of this month's new hires and include a link to the community's Onboarding group. An Engineering space might find it useful to have a list of the team's power users with a link to an external documentation site, like this:

**Figure 10: An example of a custom tile**




To create a custom tile, first you add a tile, and then configure it to include the links you want to feature:

1. Go to your place.
2. To open the Activity page for editing, select **Manage > Settings**.
3. To open a Custom page for editing, open the page and click **Edit page**.
4. In a narrow column, click **Add a tile**.
5. Under Categories, select **Custom Tiles**.
6. Choose the kind of tile you want:

Options	Description
<b>Create a Content or Place tile</b>	Use this tile if you want to create links to specific content items and/or places in your community.
<b>Create a People tile</b>	Use this tile if you want to create links to specific people in your community.

The added tile opens the configuration dialog box. Alternatively, you can click

the gear icon  to configure the tile.

7. In **Title**, enter the tile a name.

The tile name should describe the tile's content, such as Accounting Superstars or Engineering Docs.

8. Click **Add Content or Place** to add the links to the content, people, or places that you want this tile to display.
9. Optionally, you can add a link to the bottom of the tile to an internal community page or an external URL by clicking **Add an action link to the tile footer**.



10 Select the security type for this tile. The available options may differ depending on your permissions:

Options	Description
<b>Lock tile contents</b>	<p>Locking the tile makes you the only person who can edit it. Other owners of the place can remove the tile from the place, but they cannot edit it. If you edit the tile, note that all instances of the tile (in other places that you own) are updated.</p> <p>If you do not lock the tile, any changes that you or other place owners make to the tile affect all instances of the tile.</p>
<b>Save as global tile for others in the community to use</b>	<p>Only users with Manage Community or Full Access permissions see this option. All place owners in the community are able to use this tile.</p> <p>If the tile is locked, all place owners are able to use the tile but not edit it.</p> <p>If the tile is not locked, all place owners are able to edit the contents of the tile but not its title. If other place owners edit the content of the tile, all instances of the tile in the community are updated.</p>

11 Click **Apply**.

### ***Using Custom HTML tiles***

If you are a place owner, you can create an HTML tile containing custom HTML code.

#### Overview of Custom HTML tiles

You should be aware of some aspects of Custom HTML tiles before you start designing them.

The HTML tile lets you provide customized HTML in a mobile-friendly tile on a place page. It replaces the HTML widget that was available in previous versions. For more information about using HTML tiles, see [Adding an HTML Tile to a Page](#) on Worx. For information about the capability of this tile versus a developer-created tile and the HTML widget, see [Custom HTML in Your Jive Community](#) on Worx.

### **HTML tiles on mobile devices**

Whether an HTML is available or not on mobile devices, depends on the community and tile settings.

For the whole community, visibility of HTML tiles is defined by the `jive.mobile.places.tiles.htmlSupport` parameter. For more information on setting up the parameter, see [Enabling HTML tiles on mobile devices](#) on page 301.

You can control visibility of each HTML tile. Depending on the complexity of your HTML, you may have concerns about whether your presentation can be displayed effectively on a mobile device. Setting the tile to be *mobile-unfriendly* means that it won't be displayed when the page is viewed on a mobile device or in narrow browser width. If you've designed your HTML to be responsive, you can safely enable **Mobile Friendly**. For more information, see [Creating custom HTML tiles](#) on page 301.

## Link types in HTML tiles

The HTML Tile add-on differentiates between 3 types of links:

- Absolute, for example `<a href='http://localhost/groups/mygroup1/content'>Absolute</a>`
- RootRelative, for example `<a href='/groups/mygroup1/content'>RootRelative</a>`
- Relative, for example `<a href='content'>Relative</a>`

In the examples above, the HTML tile is placed within a group named *mygroup1* and that the instance URL is *localhost*. After being resolved, all three links redirect to the same URL address: `http://localhost/groups/mygroup1/content`.

### Enabling HTML tiles on mobile devices

For HTML tiles to be available on mobile devices, the `jive.mobile.places.tiles.htmlSupport` must be set to `true` for your community.

---

## Fastpath: Admin Console: System > Management > System Properties

---

To enable HTML tiles on mobile devices:

1. In the Admin Console, go to **System > Management > System Properties**.
2. Search for the `jive.mobile.places.tiles.htmlSupport` property.
3. If the property is in the list, do the following:
  - a) Click **Edit** in the property line.
  - b) In **Property Value**, type `true`.
  - c) Click **Save Property**.
4. If the property is not in the list, do the following in the **Add new property** pane at the top of the page:
  - a) In **Property Name**, type `jive.mobile.places.tiles.htmlSupport`.
  - b) In **Property Value**, type `true`.
  - c) Click **Save Property**.

### Creating custom HTML tiles

You add a tile and then add your custom code to it to create your custom tile.

Note that for HTML tiles to be available on mobile devices, your community must be appropriately configured. For more information, see [Overview of Custom HTML tiles](#) on page 300.

To create a Custom HTML tiles:

1. Go to your place.
2. To open the Activity page for editing, select **Manage > Settings** .
3. To open a Custom page for editing, open the page and click **Edit page**.
4. Click **Add a tile**.
5. Under **Categories**, select **Graphic Elements**.
6. Under **Tiles**, select **Create an HTML tile**.
7. In the **Your HTML** dialog box, provide your HTML code.
8. To upload files for the tile, click **Manage Files** and upload the necessary files.
9. In **Height (px)**, specify the height of the tile, in pixels.

You can specify the height of the tile as you want to. By default, it is set to 250 pixels for narrow tiles and 520 pixels for wide tiles. Note that with long tiles users may be required to scroll down to view all tile information.

- 10If the tile responsive and the HTML code is mobile-friendly, under **Mobile Friendly** select **Yes**.
- 11If the tile is not responsive, under **Mobile Friendly** select **No**.
- 12Click **Preview** to see how the tile looks like.
- 13Click **Submit** to enter the tile to the page.
- 14Click **Save** to save the page changes.

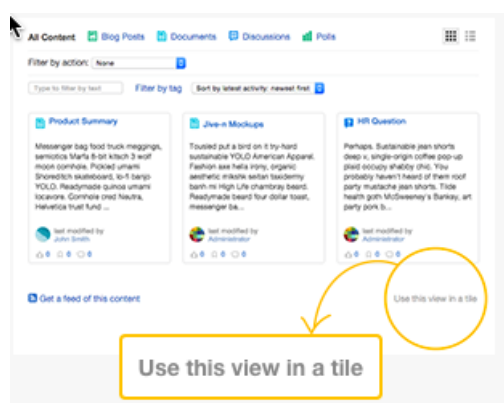
The HTML tile is added to the page.

### ***Creating Super List tile***

The Super List tile displays a filtered list of content, people, or places. You create the filter link, and then paste it into your Super List tile to get the results.

To create a filter link and add it into your tile:

1. Decide if you want information from the entire community or only information from a place to show up in your tile.
  - a) If you want to see place content only in your super list then browse to the place, and select **Content**.
  - b) If you want to see people, places, or content across the entire community, then append your community name with `/people`, `/places`, or `/content`.  
`https://community.aurea.com/content`
2. Filter and sort results that you want to see in the super list.
3. Copy the URL from the browser or click **Use this view in a tile > Copy to clipboard** .



4. Go to your place.
5. To open the Activity page for editing, select **Manage > Settings**.
6. To open a Custom page for editing, open the page and click **Edit page**.
7. In either a wide or narrow tile, click **Add a tile**.
8. Select **Lists - Dynamic > Super List**.
9. Paste the link into the **Paste filter link here** box.
- 10 If you pasted a link to filtered content, choose one of the following options:

Options	Description
<b>Basic list</b>	Use this view to show title, author, and post date
<b>Detailed list</b>	Use this view to show title, snippet of content, and, if available, number of comments, replies, likes, and views.
<b>Rich Preview</b>	Use this view to show original content author avatar and name, post date, content icon and title, a thumbnail of an image (if available), a snippet of content

- 11 You can change the title and the number of items to display.
- 12 Click **Apply** to save the tile settings.
- 13 Click **Save** to save the page changes.

A Super List tile is added to your place.

### **Creating Ask a Question tile**

An Ask a Question tile provides a field where users can type their question. As they type, search results are shown in the tile, and if no answers are found, they can create a new question from the tile.

When you add an Ask a Question tile to a place, the tile searches for all content types within the place. If a user does not find an answer, this place is also used as the default place for creating a question.

To add an Ask a Question tile:

1. Go to your place.
2. To open the Activity page for editing, select **Manage > Settings**.
3. To open a Custom page for editing, open the page and click **Edit page**.
4. In either a wide or narrow column, click **Add a tile**.
5. Select **Support > Ask a Question**.

The tile is added to the page.

6. Click **Save** to save the page settings.

An Ask a Question tile to your place.

### ***Creating Answered and Unanswered Questions Tiles***

The Answered Question and Unanswered Questions tiles can be beneficial in places where people ask questions and look for answers. These tiles help place visitors see at a glance what's been asked and answered.

The Answered Questions tile lists the place's recently answered questions, for example, questions that include a reply marked as Correct Answer. This tile can be helpful in places where people go to find answers, such as a Customer Support group or IT space. The Answered Questions tile also helps users understand that the place is active and effective — questions are being asked and answered.

The Unanswered Questions tile helps encourage users to answer questions they see listed in the tile. You might also use the Unanswered Questions tile to determine upcoming work projects. For example, the manager of an accounting space might use the unanswered questions tile for project planning.

1. Go to your place.
2. To open the Activity page for editing, select **Manage > Settings**.
3. To open a Custom page for editing, open the page and click **Edit page**.
4. Click **Add a tile**.
5. Under **Lists - Dynamic**, select either the **Answered Questions** or **Unanswered Questions** tile.
6. In **Title**, specify the title for the tile.

The default title is Answered Questions or Unanswered Questions depending on selected the tile. For example, in your place, it might be more appropriate to call the tile as Correct Answers.

7. In **Sort by**, select whether you want the **newest** or **oldest** questions to display first in the list.
8. In **Number of items to display**, specify the maximum number of questions to be displayed in the tile.

By default, the limit is set to 10 questions. The number cannot exceed 25 questions.

9. When you're finished configuring the tile, click **Save**.
10. Click **Save** to save the page settings.

The tile is added to the page. If the place has questions, they are listed in the appropriate tile.

### ***Using Content sets and Content Sets tiles***

The Content Sets tile creates a browse sequence for key content on a custom page in a place. It can connect any combination of content, as long as it's inside the place.

By using the Content Sets tile, you can create a named set of content inside a place. This content is displayed in a linked browse sequence that indicates the order of reading. Content sets can include any kind of content that resides in the place where you're creating the set. Content sets are a powerful way to link and organize content within a place. For example, if you want to create a short guide that steps someone through a conceptual background, procedure, or other subjects that requires a specific order, you can bring together documents, discussions, and status updates in a single presentation.

Content sets are available only from custom pages in a place. If you navigate to the same piece of content in a different way, for example, if you find a document in a set by searching, you won't see it in the context of the set.

### **Building a content set**

To begin creating a content set, you need to first make sure the content you want to include exists in the place where you're creating the set. If you're an administrator of the place, you can then add the Content Sets tile while adding or editing a custom page.

### **Removing content in a content set**

You can remove an item from a set by editing the content set, but deleting the content or moving it into a different place also removes the content page from the set. If you delete all the content items in a section of a content set, the section is also removed.

### **Comparing Content Sets and Expandable Sections tiles**

When you configure them, a Content Sets tile looks very similar to an Expandable Sections tile: the Content Set tile shows an ordered list of content (which also shows a collapsible view of content links with) and the Expandable Sections tile descriptions and section headings. However, the Content Sets tile is designed as a portal for reading a group of linked items in sequence, while Expanded Sections presents an organized set of quick links from around the community. The two tiles have the following important differences:

	Content Sets	Expandable Sections
Content Source	Only content posted in the Place where the tile is	Anywhere in the community, including personal or private content
Navigation	Move from page to page in the set without leaving the content group or returning to the tile page	One-way click-through from the tile page to each page in the set
Location	Custom pages and Activity pages	Your View, custom pages, and Activity pages

### ***Using Expandable Sections tiles***

The Expandable Sections tile lets you create a collapsible list of content links inside a tile on a place page, an Activity page, or your Your View page.

By using the Expandable Sections tile, you can organize content from around the community in an annotated list with headings. Your presentation of the linked content is displayed inside the tile. Website developers sometimes call this presentation an Accordion.

Expandable Sections can include any content you can see so that you can include content in private or secret (also known as private unlisted) groups. This makes the tile useful in Your View. Note that people who don't have access to the linked content won't see the links. They also won't see any sections that only contain links to content they can't see.

### **Removing content**

You can remove an item by editing the tile, but deleting the content also removes the content page from the tile. If you delete all the content items in a section of a content set, the section is also removed.

### **Comparing Content Sets and Expandable Sections tiles**

When you configure them, a Content Sets tile looks very similar to an Expandable Sections tile: the Content Set tile shows an ordered list of content (which also shows a collapsible view of content links with) and the Expandable Sections tile descriptions and section headings. However, the Content Sets tile is designed as a portal for reading a group of linked items in sequence, while Expanded Sections presents an organized set of quick links from around the community. The two tiles have the following important differences:

	Content Sets	Expandable Sections
Content Source	Only content posted in the Place where the tile is	Anywhere in the community, including personal or private content
Navigation	Move from page to page in the set without leaving the content group or returning to the tile page	One-way click-through from the tile page to each page in the set
Location	Custom pages and Activity pages	Your View, custom pages, and Activity pages



### ***Troubleshooting tiles***

You can diagnose and fix common problems with tiles by looking at our troubleshooting tips.

#### **Relative URLs in HTML tiles are resolved incorrectly**

The relative links in the existing HTML tiles sometimes may be resolved incorrectly, and the resulting URL in the tile is malformed. With Jive 2019.1 we provide a fix to this issue that affects all newly created tiles and a workaround for fixing up existing tiles.

To fix an existing HTML tile, do the following:

1. Create a new HTML tile.
2. Copy-paste the HTML code from an original HTML tile to the new tile.
3. Delete the original HTML tile.

#### ***Tile reference***

Your View, Activity, and News pages all contain tiles. Here you can find references for these tiles to help you understand which tiles you can access and from where.

For more information about tiles, see [Using tiles](#) on page 297.

#### **Tiles support in Jive Daily Hosted**

The tiles you add to pages are displayed in the Jive Daily Hosted app in one column regardless of the tile layout selected for the page. You should also note that the app supports not all tiles; you can find the details in this section.

Your View tile reference

Here's a list of the tiles available on a Your View page.

Tiles are split by category, similar to tiles arrangement in the UI. Some tiles can be available in more than one category.

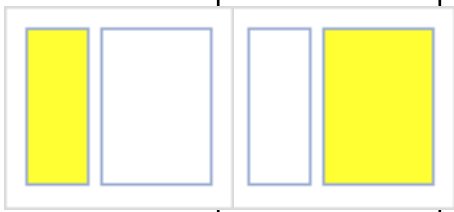
---

**Note:** This page is not supported by .

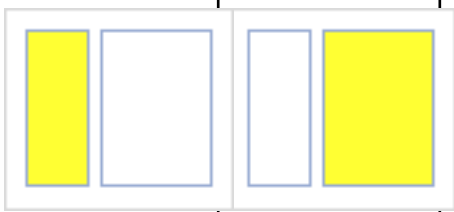
---



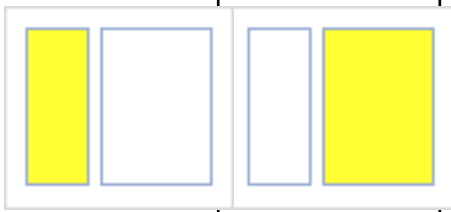
## Collaboration tiles

Tile	Description	Dependencies		
			Narrow column	Wide column
Document Viewer	Shows a full pre-view of a document you choose to display	Content added manually		
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually		
Key Dates	Shows selected dates for your team	Content added manually		

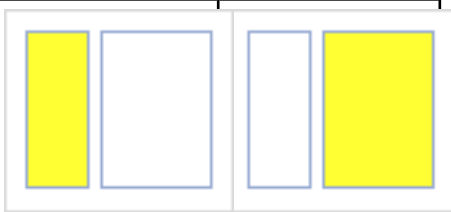
## Graphic Elements tiles


Tile	Description	Dependencies		
			Narrow column	Wide column
Gauge	Shows status on a gauge	Set manually		
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually		

## Custom List tiles

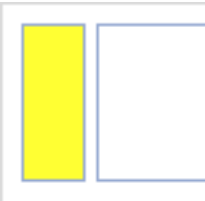
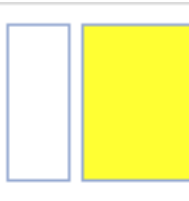
Tile	Description	Dependencies		
			Narrow col- umn	Wide col- umn
Expandable Sections	Shows links to community content under collapsible headings	Content added manually		
Featured People	Builds a list of important people for your place	Content added manually		
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually		
Key Content and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually		

## Dynamic List tiles

Tile	Description	Dependencies		
			Narrow col- umn	Wide col- umn
Frequently Viewed	Shows the people, places, and content you visit most	Relies on an algorithm		
Latest Blog Posts	Shows the newest blog posts in your community	Content added manually. Blogs must be enabled		

Tile	Description	Dependencies		
			Narrow column	Wide column
Recently Viewed	Shows the people, places, and content you viewed recently	Relies on an algorithm		
Similar Places	Shows places with the same tags	Relies on content being tagged		
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result		
Tagged Content	Displays content that matches specific tags	Relies on content being tagged		
Trending Content	Shows content that's attracting views and interactions	Relies on an algorithm		

## Support tiles

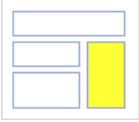
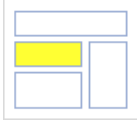

Tile	Description	Dependencies	 Narrow col- umn	 Wide col- umn
Helpful Links	Build a list of useful links for quick reference. Links can be internal to your community or external URLs.	Content added manually		
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result		

## News page tile reference

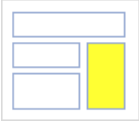
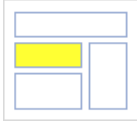

Here is a complete list of the tiles available on the News page of your community.

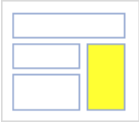
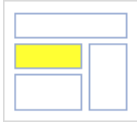
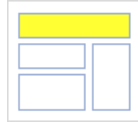
Tiles are split by category, similar to tiles arrangement in the UI. Some tiles can be available in more than one category.

## Collaboration tiles

Tile	Description	Dependencies				Jive Daily support
			Narrow column	Widecolumn	Jumbo column	
Document Viewer	Shows a full preview of a document you choose to display	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Key Dates	Shows selected dates for your team	Content added manually				




## Graphic Elements tiles

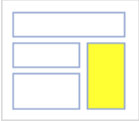
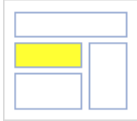
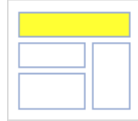
Tile	Description	Dependencies				Jive Daily support
			Narrow column	Widecolumn	Jumbo column	
Banner	Adds a series of linked images with text to promote important content	Content added manually				
Carousel	Links a rotating image carousel to crucial destinations	Content added manually				
Create an HTML Tile	Adds HTML	Content added manually				*

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Image Gallery	Creates a slideshow with images and captions	Content added manually				
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually				

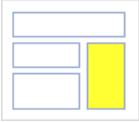
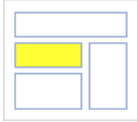
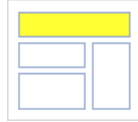
\* The configuration of each Custom HTML tile defines if it is available on Jive Daily for Cloud. For more information, see [Using Custom HTML tiles](#) on page 300.


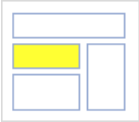

### Custom List tiles

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Expandable Sections	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important people for your place	Content added manually				

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Key Content and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually				

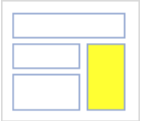
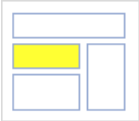

### Dynamic List tiles

						
Tile	Description	Dependencies	Narrow column	Wide column	Jumbo column	Jive Daily support
Featured Quest	Shows the user's progress as they complete a quest	Relies on a quest being selected				
Latest Blog Posts	Shows the newest blog posts in your community	Content added manually. Blogs must be enabled				
Similar Places	Shows places with the same tags	Relies on content being tagged				

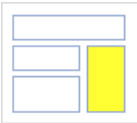


Tile	Description	Dependencies	 Narrow column	 Wide column	 Jumbo column	Jive Daily support
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result				
Tagged Content	Displays content that matches specific tags	Relies on content being tagged				
Top News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on content from the News streams				
Trending Content	Displays content that is getting an increase in views and likes	Relies on content getting viewed or liked, or both				
Trending People	Displays people whose activity is getting an increase in views and likes	Relies on content getting viewed or liked, or both				



## Support tiles

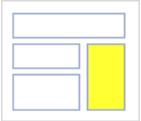
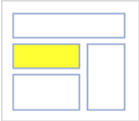

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Ask a Question	Finds a previously asked or answered question, or gives the ability to ask a new one	Relies on content query. Configure to select content types and places to query				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs.	Content added manually				
Super List	Shows an updated, filtered view of content, people, or places.	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result				

## External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	 Widecol- umn	 Jumbo column	Jive Dai- ly sup- port
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually				*
Quests	Displays quests for community members to complete	Relies on a quest being enabled				
Hero Image	Provides a key image with a link and call to action as a header for your News page	Content added manually				

\* The configuration of each Custom HTML tile defines if it is available on Jive Daily for Cloud. For more information, see [Using Custom HTML tiles](#) on page 300.

## Custom tiles

Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Create a Content or Place Tile	Displays a list of content and places that you can edit and manage yourself. This tile and its content can be shared and used by other people in the community	Content added manually				
Create a People Tile	Build a list of important people for your place	Content added manually. This tile and its content can be shared and used by other people in the community				

### Place tile reference

Here's a complete list of the tiles available on the Activity and custom pages of a place. You may also see other custom tiles in Your View that are not listed here which have been created by your community manager.

You should be able to satisfy most of your needs with the built-in tiles and the Create New Tile feature that allows you to create a custom tile; for more information, see [Creating Custom tiles](#) on page 298. But it is also possible to develop tiles that aren't included in the product, including tiles for third-party integrations. For more information, see the Jive Developers' site at <https://developer.jivesoftware.com/intro>.

Tiles are split by category, similar to tiles arrangement in the UI. Some tiles can be available in more than one category.

---

**Note:** You can see different options depending on which features are enabled in your community.

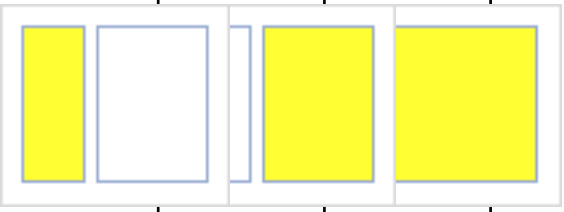
---

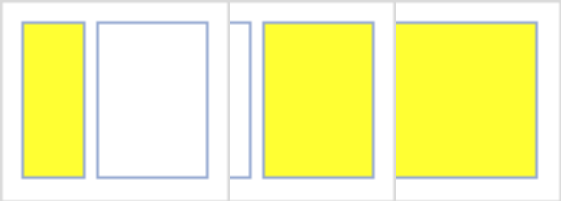
## Your tiles

Tile	Description	Dependencies
<i>Your Custom Tile Name</i>	Any custom tiles you have created are listed here	You must first create a New Content, People, or Places tile to see the Your Tiles option under Categories. For more information, see <a href="#">Creating Custom tiles</a> on page 298.

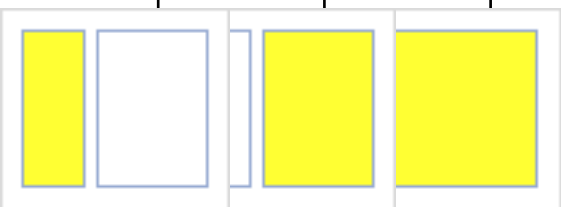
These tiles are not supported by Jive Daily Hosted.

## Collaboration tiles

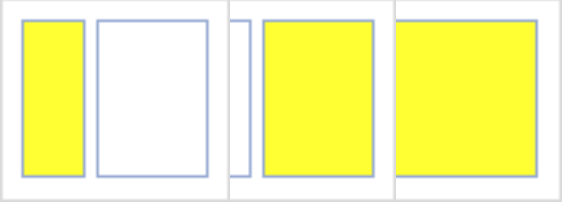
Tile	Description	Dependencies				
			Narrow column	Widecolumn	Jumbo column	Jive Daily support
Action Items	Tracks the content that needs follow-up actions	Relies on content being marked as Needs Action				
Categories	Displays content in selected categories	Relies on categories configured in the current place			Custom page only	
Document Viewer	Shows a full preview of a document you choose to display	Content added manually			Custom page only	
Featured Content	Shows content marked as Featured	Relies on content being marked as Featured			Custom page only	
Finalized Content	Shows content that has been marked Final	Relies on content being marked as Final				

Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Key Dates	Show selected dates for your team.	Content added manually				
Popular Content	Shows content that's getting views and likes	Relies on content getting viewed and liked			Custom page only	
Recent Decisions	Shows the most recent items that were marked as Decision	Relies on content being marked as Decision				
Upcoming Events	Shows events created in your place	Relies on content from the Events plugin				

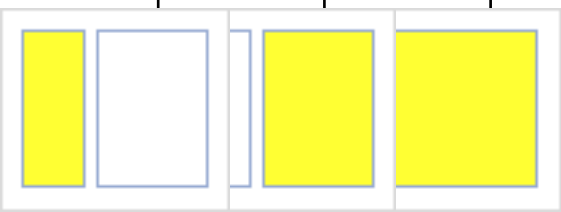
## Graphic Elements tiles

Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Banner	Adds a series of linked images (up to 5) with text to promote important content	Content added manually				
Carousel	Link a rotating image carousel to crucial destinations	Content added manually				
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually			Custom page only	
Gauge	Shows status on a gauge	Set manually				
Image Gallery	Creates a slideshow with images and captions	Content added manually				
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually				
Video (Featured)	Display a video from anywhere on the Internet	Content added manually			Custom page only	

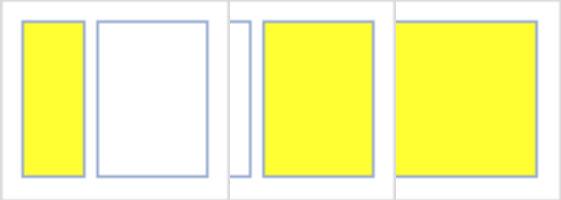
## Custom List tiles

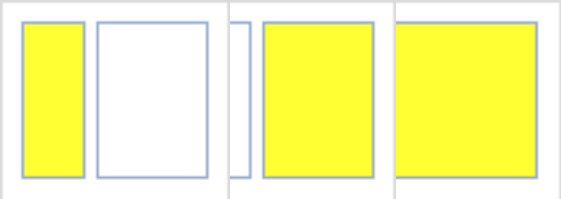
Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Categories	Display content in selected categories	Relies on categories configured in the current place			Custom page only	
Content Sets	Shows community content inside a tile, in a browse sequence you design. For more information, see <a href="#">Using Content sets and Content Sets tiles</a> on page 305	Content added manually			Custom page only	
Expandable Sections	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important people for your place	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs.	Content added manually				
Key Content and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually				

## Dynamic List tiles

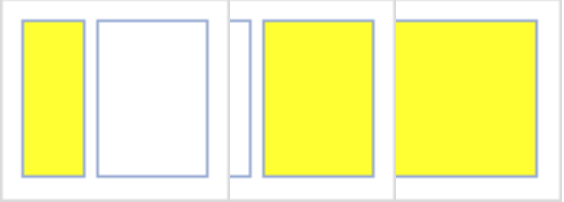
Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Action Items	Tracks the content that needs follow-up action	Relies on content being marked as Needs Action				
Answered Questions	Displays a list of questions that have been answered in the place	Relies on discussions marked as questions that include a reply marked as Correct Answer or Assumed Answered			Custom page only	
Featured Content	Shows content that's been marked as Featured	Relies on content being marked as Add as Featured Content			Custom page only	
Featured Quest	Shows your progress in completing the featured quest	Relies on a quest being designated				
Finalized Content	Shows content that has been marked as Final	Relies on content being marked as Final				
Latest Blog Posts	Shows the newest blog posts in your community	Content added manually. Blogs must be enabled				
Popular Content	Shows content that is getting views and likes	Relies on content getting viewed and liked			Custom page only	

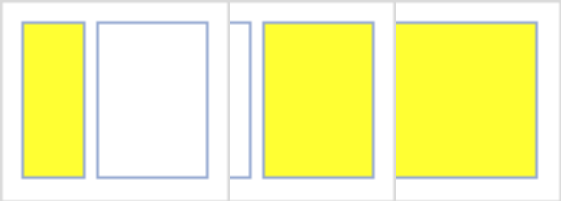


Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Recent Decisions	Shows the most recent items that were marked as Decision	Relies on content being marked as Decision				
Similar Places	Shows places with the same tags	Relies on content being tagged				
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result				
Tagged Content	Displays content that matches specific tags	Relies on content being tagged				

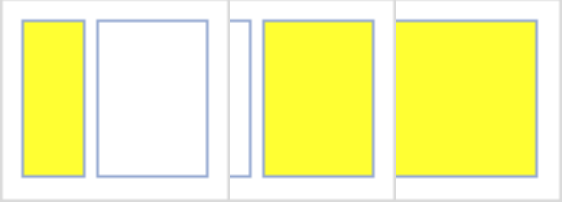
Tile	Description	Dependencies		Narrow column	Wide column	Jumbo column	Jive Daily support
Top Participants	Shows frequent contributors to the place	Populated when activity happens in the place. Note that this tile uses the same information as the status levels in your community					
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on discussions marked as questions that do not yet have a reply marked as Correct Answer or Assumed Answered			Custom page only		

## Support tiles

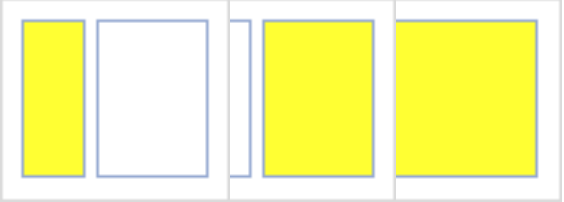
Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Answered Questions	Displays a list of questions that have been answered in the place	Relies on discussions marked as questions that include a reply marked as Correct Answer or Assumed Answered			Custom page only	
Ask a Question	Finds a previously asked or answered question, or asks a new one	Relies on content query. Configure to select content types and places to query				
Helpful Links	Build a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				

Tile	Description	Dependencies				
			Narrow column	Widecolumn	Jumbo column	Jive Daily support
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result				
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on discussions marked as questions that do not yet have a reply marked as Correct Answer or Assumed Answered			Custom page only	

## External Add-Ons tiles

Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Account Info	Pulls in the details of an account from Salesforce	Relies on the account details from Salesforce. Requires a Salesforce account				
Opportunity Info	Pulls in the details of an opportunity from Salesforce	Relies on the account details from Salesforce. Requires a Salesforce account				
Opportunity Gauge	Shows the probability details of a Salesforce opportunity in gauge format	Relies on the account details from Salesforce. Requires a Salesforce account				
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually				

## Custom tiles

Tile	Description	Dependencies				
			Narrow column	Wide column	Jumbo column	Jive Daily support
Create a Content or Place Tile	Displays a list of content and places that you can edit and manage yourself. This tile and its content can be shared and used by other people in the community	Content added manually				
Create a People Tile	Build a list of important people for your place. This tile and its content can be shared and used by other people in the community	Content added manually				

## Designing Overview pages for places

Overview pages with image-based navigation can quickly direct your users to useful pages. You can define the content and layout of Overview pages for places that you have administrator rights.

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

Places (social groups, projects, and spaces) become more inviting when you customize their overview pages to display the items members care about most. Depending on your overview page customization rights, you can get these pages to look the way you want by using widgets that help you choose and arrange content. For more information about permissions, see [Customization permissions for Overview pages](#).

Each widget displays content of a particular kind — for example, HTML, recent content, or feed subscription results — in a box that you can drag into position on a page. After you publish the page, you can always come back and update its content or design. A complete reference to available widgets can be found in [Widget reference](#) on page 339. For the steps for customizing overview pages, see [Setting up Overview page](#) on page 331.

---

**Attention:** Widgets are not responsive in design and are not recommended to use in communities which rely on being available from mobile devices. We recommend that you use Activity or custom pages with tiles instead of Overview pages. For more information, see [Designing activity and custom pages for places](#) on page 275.

---

### Overview page best practices

Here are a few key guidelines for designing pages with widgets.

- Make sure the widgets you choose help users to identify the purpose of the place and quickly find the information they need.
- Note that with widgets, less is more. Highly complex pages can lead to performance challenges as well as user confusion. You should use only as many widgets as you need to provide essential information for the place without overloading it.
- Make sure you limit the number of images on the page. Loading many images on every page load can make your page slower and create visual clutter.
- Limit group and space ownership to one or a very few users to safeguard your design and protect security.

### *Adding Overview page*

When widgets are enabled in your community, you can add an Overview page to a place.

Overview pages are based on widgets while other pages, such as Activity and custom pages are based on tiles. Please note that tiles provide a better user experience and perform better, especially on mobile devices.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

If you want a place to have an Overview page, you can add either an Overview page or both Activity and Overview pages. You can't enable Overview and Custom Tile pages for a place at the same time.

---

**Tip:** If you use the checkpoint and status functionality for tracking project tasks, you may want to stick with the old-style Overview page rather than updating to the Place Template format. The widgets in the Overview page more effectively support Projects at this time.

---

For more information about Overview pages, see [Designing Overview pages for places](#) on page 329.

## Adding an Overview Page to a place

To use an Overview page in your place:

1. Go to the landing page for your place and click the **Manage > Settings > About** . The **Edit Group** page opens.
2. Click **Advanced Options** .
3. Select **Overview** or **Activity + Overview**.
4. If prompted, select the landing page, that is, determine which page must open when a user opens the place.
5. Click **OK**.
6. Click **Save** at the bottom of the page.

The Overview page is added to your place and becomes visible to other users.

### ***Setting up Overview page***

You can customize the layout of your place Overview page to organize it better and display your group's information.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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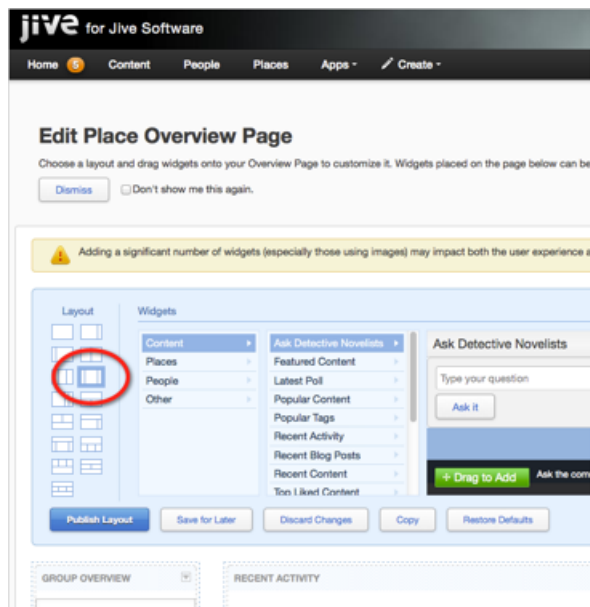
The Overview page must be added to your place. For more information, see [Adding Overview page](#).

When you customize the Overview page for a place, you decide on a column view, then drag widgets into the layout.

To customize the Overview page of a place:

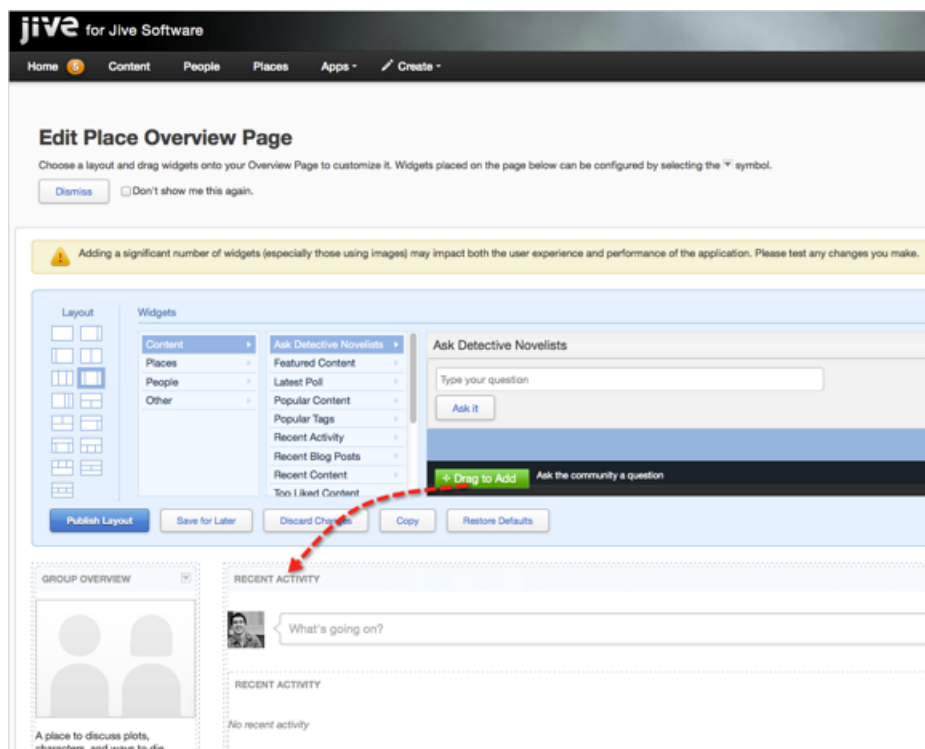
1. In your place, click the **Manage > Overview page** .
2. Under **Layout**, select the layout for the page.







Note that the available widgets depend on the layout you selected.

3. Under **Widgets**, select a widget you want to add and drag it into one of the layout columns below.



4. To configure the widget, click  > **Edit this widget** in the upper right corner of the widget, and specify its properties in the dialog box.

For example, the configuration dialog box of a Recent content tile looks like this:

5. Click **Save Properties** to save the widget settings.
6. For every widget you want to add, repeat Steps Step 3 on page 332-Step 5 on page 333.
7. To remove a widget, click  > **Remove this widget** in the upper right corner of the widget.
8. To save all your changes, click **Publish Layout**.

The changes are saved, and the updated page becomes visible to other users.

### **Setting up Search widget**

The Search widget allows your users to quickly search a specific space or group in your community, or community as a whole.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

You must be able to edit the place where you want to add the widget. For more information, see [Customization permissions for Overview pages](#).

To add a Search widget to the Overview page of your place:

1. In your place, click the **Manage > Overview page**.
2. From the widgets list, select **Content > Search Widget**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Search) or create your own, for example, Search Here.

6. In **Number of Results**, enter the number of results to return in the search.
7. In **Place to Search**, select the place to perform the search. Do one of the following:
  - Leave the box blank to search the current place.
  - Type a place name to search the selected place. This can be any place in the community, or the entire community (which would be your root space).
8. Click **Save Properties**.
9. When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved, and the updated page becomes visible to other users.

### ***Setting up Image Navigation widget***

With this widget, you can provide your users with image-based navigation to quickly direct your users to useful pages. First, you add the Image Navigation widget to your place layout, then add images and links to the widget.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

You must be able to edit the place where you want to add the widget. For more information, see [Customization permissions for Overview pages](#).

First, you add the Image Navigation widget to your place's layout, then add images and links to the widget.

### **Adding Image Navigation widget**

To add an Image Navigation widget to your place layout:

1. In your place, click the **Manage > Overview page**.
2. From the widgets list, select **Other > Image Navigation Widget**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Image Navigation Widget), create your own, or leave the box blank if you do not want any title.

6. In **Hide Header and Border**, select whether you want the header and border to be displayed.
7. Click **Save Properties**.

The **Add a new link** button appears in the widget.

### **Adding images to the widget**

After you've added the Image Navigation widget to your place layout, you can add images and links to the widget, then publish the updated layout of the place.

To add images to the widget:

1. In the widget, click **Add a new image link**.
2. In **Provide a Target Link**, type in the URL to which you want the image to link.
3. Provide a caption for the image.  
You can use the caption Jive provides automatically, or overwrite it with your own.
4. Select the image you want to use for this link.
5. Click **Save**.
6. Repeat these steps until you have all the images you want to display in the widget.  
The limit is 8. You can move them around to change the order in which they are displayed by dragging and dropping them.
7. When you are finished, click **Publish Layout** on the editing page.

### ***Setting up Ask widget***

The Ask (place) widget allows users to quickly ask a question in a specific space or group in your community, or the entire community. After the user types a question into the Ask widget, the search function displays possible answers based on matching keywords. If the user doesn't see the correct answer in the results list, they can create a discussion right from the widget. This can be especially helpful in places designed to support customers or employees.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

You must be able to edit the place where you want to add the widget. For more information, see [Customization permissions for Overview pages](#).

To add an Ask (place) widget to the Overview page of your place:

1. In your place, click the **Manage > Overview page**.
2. From the widgets list, select **Content > Ask (place)**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Ask (place)) or create your own, for example, Ask Us a Question.

6. In **Submit button text**, enter the text to be displayed on the Ask button.  
You can use the default text or create your own, for example, Submit Your Question.
7. In **Search From**, select a place you want to perform the initial search.

You can search in the current place, a single place that you specify, or all public places in the community (the root space).

8. In **Number of Results**, enter the number of results to return in the search.
9. In **Display Results**, select which search results must be displayed. You can select one, some, or all of these options:

Options	Description
<b>All Questions</b>	Displays in search results all questions that have been asked, whether or not they have been answered.
<b>All Discussions</b>	Displays only discussions in search results.
<b>Answered Questions</b>	Displays only Answered Questions in search results.
<b>Documents</b>	Displays only documents in search results.

10. In **Post Questions to**, select the place to which you want questions posted.

The place can be different from the place where the Ask widget is located. For example, you could put the Ask widget in an Employee Questions group, but post the questions to the Employee Q&A group.

11. Click **Save Properties**.

12. When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved, and the updated page is available to other users.

#### ***Setting up Answered Questions widget***

The Answered Questions widget allows your users to quickly see a list of questions that have been answered in a specific space or group in your community, or the entire community. Answered questions displayed in this widget are those that include a reply marked as a Correct Answer.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

To add an Answered Questions to the Overview page of your place:

1. In your place, click the **Manage > Overview page**.
2. From the widgets list, select **Content > Answered Questions**.
3. Drag the widget down into your layout area and drop it where you want it.
4. Click the small triangle in the upper right corner of the widget and select **Edit this widget**.
5. In **Custom title**, enter the title for the widget.

You can use the default title (Answered Questions) or create your own, for example, Recently Answered.

6. In **Number of Results**, enter the number of answered questions to display in the widget.
7. In **Show Oldest Questions First**, select the order in which you want the answered questions to be displayed.
8. In **Place**, specify the place from which you want to pull the answered questions. Typically, this the current place is used, but it could be any other place in the community as well, or the entire community (this would be your "root" space).
9. Click **Save Properties**.
10. When you're finished making changes to your place's layout, click **Publish Layout**.

The changes are saved, and the updated page is available to other users.

### ***HTML and Formatted Text widgets***

The HTML and Formatted Text widgets are designed to display customized information on Overview places, including the community Home page. They are flexible but should be used carefully to ensure effective, performant pages.

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**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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You can use HTML and Formatted Text widgets to embed all kinds of assets, including images. These widgets are often used to provide visual orientation or branding to the site or the place. The HTML widget also allows you to add JavaScript and CSS elements, with certain security limitations, which are described later in this topic.

### **Uploading resources to a widget**

You can use the Formatted Text and HTML widgets to upload up to 10 file resources per place. Spaces can include any kind of files: groups and projects are limited to GIF, JPEG, PNG and BMP files. Files you upload are stored as part of your community so you don't have to retrieve them from an external location, which can improve performance and saves you the trouble of hosting them elsewhere. You can then refer to these resources in any Formatted Text or HTML widget you have access to edit. For detailed instructions, see [Uploading files to widgets](#) on page 338.

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: The resources you upload this way are posted on the Internet and can be viewed by anyone with access to the network. By design, they don't inherit the authentication requirements of your site or the permissions to the place where you upload them.

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### **Managing performance**

Uploading resources is a good way to limit the performance impact of resource loading from your widgets: uploaded resources don't need to be authenticated on page load. However, you should consider user page loads when determining the number and content of widgets.



## Managing HTML widget security

To ensure security and prevent problems that can corrupt your pages and keep them from loading, any HTML widget code that calls a `<script>` tag is contained in an isolated iFrame. This is known as the Safe mode. If you want to include CSS or any other styling in the widget, you can include it in the same location as your HTML code. Isolation of the HTML widget also means that the widget can't borrow JavaScript from the Overview page, and that visual components cannot extend beyond the perimeter of the iFrame. Simple HTML, JavaScript, and CSS continue to be supported.

In the Safe mode, you can still call the assets associated with the core Jive installation as follows:

```
<script src="/resources/scripts/jquery/jquery.js"/>
<link rel="stylesheet" href="/styles/jive.css" media="all"/>
```

It's possible for your site administrator to use a system property to override the default Safe mode behavior (iFrame isolation) and allow external JavaScript access from the HTML widget. However, this approach requires caution and is not recommended. In previous versions, before the Safe mode was implemented for widgets, it was possible for corrupted widget code to cause serious problems that affected the database.

Widget upload access should be limited to users you trust. Because any social group owner can upload resources to these widgets, it's possible for users to make incorrect judgments about appropriateness and security, so make sure group owners are carefully chosen.

### ***Uploading files to widgets***

You can use the Formatted Text and HTML widgets to upload file resources into Jive so that you can link to them directly by using their URL.

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**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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You can upload any kind of static file from a menu inside the Formatted Text and HTML widgets. You can also see the available uploaded resources and copy their URLs so you can use them in your widget code. You can upload up to 300 files per place.

---

: The resources you upload this way are posted on the Internet and can be viewed by anyone with access to the network. By design, they don't inherit the authentication requirements of your site or the permissions to the place where you upload them.

---

To upload or delete a static resource:

1. In your place, click the **Manage > Overview page**.
2. Under Layout, click **Widgets > Other > HTML** or **Widgets > Other > Formatted Text**.
3. Click **Manage Files**.

This opens the **Manage Files** dialog box.

4. Click **Upload a File**.

Note that in groups and projects you can upload only image files.

Your file is added to the **Your uploaded files** list.

5. To copy the URL so you can use it to refer to the file in this or another widget, click **Copy to Clipboard**.
6. To delete a file, return to the **Manage Files** dialog box, and then click the x next to a file name.

Deleting a file breaks links and references to the file. Make sure you're not using the file in any widgets before deleting the file.

7. When you're finished making changes to your place layout, click **Publish Layout**.

### ***Customization permissions for Overview pages***

The Overview pages of places are customizable. Here you can find who can change what on place Overview pages.

Page	Description	Who can customize
Space-Overview	Is displayed on the Overview tab of space	A space administrator
Project Overview	Is displayed on the Overview tab of a project	The project's creator. Space and group owners can edit projects that belong in the space or group
Group Overview	Is displayed on the Overview tab of a group	All group owners
Community Overview (Home)	Is displayed the landing page of your community (if configured)	Community manager

### ***Widget reference***

Different widgets are available in different types of pages. Here you can find references for these widgets to help you understand which tiles you can access and from where.

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**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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**Restriction:** If your community does not have additional modules enabled, you may not see some of the feature options that are listed and your options may be different.

---

The following tables show the types of widgets that can be used to customize place overview pages, as described in [Designing Overview pages for places](#) on page 329.



## Content widgets

Name	Description	Used In
Answered Questions	Shows questions that have had a reply marked as the Correct Answer	All
Ask [place name]	Allows a user to ask a question while type-ahead search tries to answer it with a link to content in the place. If search does not find a match, it prompts the user to ask the question by creating a new discussion in the place	All
Event Calendar	Displays upcoming events for the space or group in a calendar format  Note that you must have the Events plugin installed to see and use this widget.	Group Overview, Space Overview
Event View	Displays a specific event from any place. The event ID is located in the URL for the event, for example, <a href="http://yourcommunity/version/events/1000">http://yourcommunity/version/events/1000</a> . In this case, the ID is 1000  Note that you must have the Events plugin installed to see and use this widget.	All
Featured Content	Shows the featured content (place owners can designate content items to feature).	All
Featured Video	Shows a featured video  Note that you must have the Video plugin installed to see and use this widget.	Group Overview, Project Overview, Space Overview
Latest Poll	Shows the most recent poll created in the current place	All
Popular Content	Shows the most liked content. Can be customized to show any combination of recent discussions, documents, polls, and blog posts from the current place	All
Popular Tags	Shows the most commonly used tags in the current place	All
Popular Videos	Shows the most liked videos  Note that you must have the Video plugin installed to see and use this widget.	All
Recent Activity	Displays a list of the most recent activity to show what people are doing	All
Recent Blog Posts	Shows the first 200 characters of a specific user's blog posts, plus images from the blog	All
Recent Content	Can be customized to show any combination of recent discussions, documents, polls, blog posts, and bookmarks from the current place	All

Name	Description	Used In
Recent Ideas	Displays the recent ideas of the place. Note that you must have the Ideation plugin installed to see and use this widget.	All
Recent Videos	Displays the recent videos of the place. Note that you must have the Video plugin installed to see and use this widget.	All
Search	Allows users to search a place. Note that you can point this widget to any other place in the community, not just its containing space. For example, your Human Resources space could search the Wellness group from this widget	All
Tagged Event	Displays the most recent event that uses a specific tag that you define. Note that you must have the Events plugin installed to see and use this widget.	All
Tasks	Displays the upcoming tasks in this project	Project Overview
Top Ideas	Shows the top ideas in the community	All
Top Liked Content	Shows the content with the most likes in the current place	All
Top Rated Content	Shows the content with the highest rating in the current place	All
Unanswered Questions	Shows discussions in the current place that have been marked as a question, but have not yet been marked as Answered	All
Upcoming Events	On the Home page, displays all visible upcoming events in the system. For all other places, displays the upcoming events for the place. Note that you must have the Events plugin installed to see and use this widget.	All
View Blogs	Shows blog post titles, a 200-character excerpt, or the full content of blog posts in a specified place	All
View Document	Displays a document you selected	All
Watch a Tag	Shows community content that is tagged with one or more tags that you specify when setting up this widget. This widget is keyed to the official Tags of content and does not show content with inline #hashtags or @mention text in the body of the content	All

**Place widgets**

<b>Name</b>	<b>Description</b>	<b>Used In</b>
Featured Places	Shows a list of community places that you designate	All
Groups	Shows similar groups to the current group	All
Places	Shows the places around the community in a list view sorted by place type	Home Page
Projects	Shows the associated projects of the place	Group Overview, Space Overview
Related Groups	Shows a list of groups similar to the current group	Group Overview
Related Projects	Shows a list of projects similar to the current project	Project Overview
Space Grid	Shows the sub-spaces of the current space in a grid view	Home Page, Space Overview
Space Tree	Shows the sub-spaces of the current space in a tree view.	Home Page, Space Overview
Spaces	Shows the sub-spaces of the current space in a list view	Home Page, Space Overview

**People widgets**

<b>Name</b>	<b>Description</b>	<b>Used In</b>
Featured User	Displays the selected user profile image and basic information with an optional description	All
Members	Shows the people who have joined the project	Project Overview
Newest Members	Shows the people who most recently joined the community	Home page
Recent Activity	Displays a list of the most recent activity to show what people are doing	All
Recently Joined	Shows the people who most recently joined the group	Group Overview
Top Participants	Show the people who created or replied to the most activity. Note that user status points displayed in this widget refer to points earned in the given place only	All

## Other widgets

Name	Description	Used In
Actions	Displays the Action links through which people can create content for a place	All
Categories	Displays the administrator-defined categories for a place	Group Overview, Project Overview, Space Overview
Checkpoints	Shows project milestones	Project Overview
Formatted Text	Displays your text with formatting, links, and images	All
Group Overview	Displays an image and description for the group	Group Overview
HTML	Renders your HTML with JavaScript or even CSS. You can add custom buttons to this widget using the <code>&lt;button&gt;</code> class	All
Image Navigation	Displays a clickable menu of images and captions linked to locations you select	All
Individual Leaders	Shows a list of community members who have earned the most Rewards, as configured by the place owner	Group overview, Space overview, Home page
Project Calendar	Shows checkpoints and tasks due in coming weeks	Project Overview
Project Overview	Shows the project's graphic, owner, and creation date	Project Overview
Project Status	Shows an owner-determined status for a project	Project Overview
Quick Tips	Displays a random quick tip about using the community	Home page
RSS Subscription	Displays results of a feed from another part of the community or from another web site	All
Slideshow Carousel	Embeds rich images and news content into a carousel widget	All
Space Overview	Shows space graphics, description, tags, and creation date	Space Overview
Social Media	Adds actions for quick sharing of the page outside of the community. The widget must be enabled in the community. For more information, see <a href="#">Enabling Social Media sharing</a> on page 98	Home page, Group Overview, Project Overview, Space Overview

### ***Sharing Exchange calendars in an HTML Text widget***

If you are using an Exchange 2010 SP1 or later email server, you can set up a community widget to show user Exchange calendars, with customizable levels of visible calendar details.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

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**Caution:** Calendar sharing uses Exchange Web Services to make HTML and iCal versions of users calendars available. Depending on your Exchange topology, this can (and will) publish calendar URLs to the Internet, where they could be viewed by anyone. If you want to prevent this, make sure you have a secure firewall in place.

---

To share an Exchange calendar, first, you set up sharing profiles on the Exchange side, then publish shared calendars in your community.

To set up your Exchange server for sharing:

1. Create a calendar sharing profile.
2. Enable the calendar sharing profile for each user for whom you want to have a visible calendar in the community.

---

**Note:** You cannot share calendars contained in public folders. A shared calendar must be a user mailbox.

---

To publish shared calendars in your community:

1. Ensure that calendar publishing is enabled on your Exchange server. To do this, you can use the following Exchange PowerShell commandlet:

```
Get-OwaVirtualDirectory | ft server, Name, CalendarPublishingEnabled
```

2. Enable calendar publishing with the following command:

```
Set-OWAVirtualDirectory "SERVER\owa (Default Web Site)"
-CalendarPublishingEnabled:$true
```

3. From the Exchange Management Shell, create a new calendar sharing profile and enable anonymous shares:

```
New-SharingPolicy -Name "Calendar Sharing Policy"
```

4. Set the sharing policy on user mailboxes who wish to share their calendars:

```
Set-Mailbox -Identity User.Mailbox -SharingPolicy "Calendar Sharing Policy"
```

5. Notify the target users to share their calendars either via Outlook 2010 or via Outlook Web Access.

6. When the user publishes a shared calendar, copy the full text of the **Link for viewing calendar in a web browser**. This link usually looks like this:

```
https://YOUR.MAIL.SERVER/owa/calendar/GUID@YOURDOMAIN.PUBLIC/DIFFERENT_GUID/calendar.htm
```

7. In the community place where you want to share calendars, add an HTML widget.

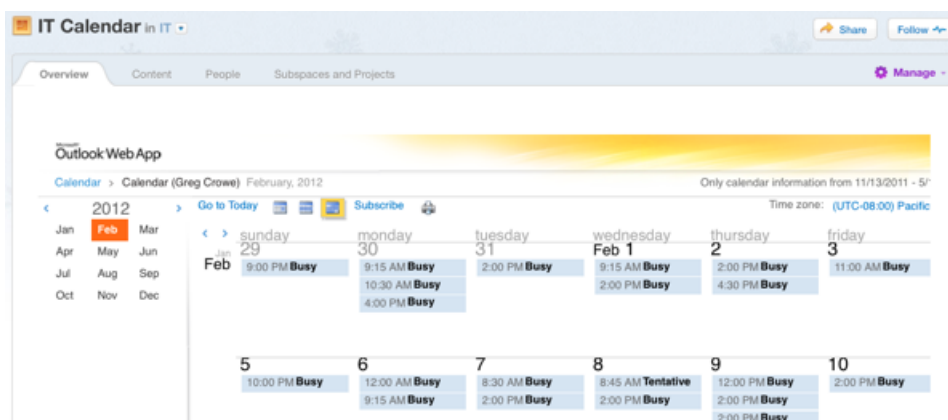
8. In the widget, include the link you copied in Step 6 in an iframe tag as follows:

```
<iframe
src="https://YOUR.MAIL.SERVER/owa/calendar/GUID@YOURDOMAIN.PUBLIC/DIFFERENT_GUID/calenda
width="1200" height="800"></iframe>
```

9. Save the HTML tile.

10. Save and publish your changes to the place.

A page with a shared calendar may look like this:



## Making bulk changes to content in places

You can make bulk changes to content items stored in a place, including applying tags, categories, and outcomes. Also, you can move or delete a list of items. This can be a quick and easy way to organize the content in a place better so that you and others can find it faster later.

You need to be the place owner or have the Manage Community permissions to make bulk changes in the place.

To make changes to content in bulk:

1. Go to the place you own and click the **Manage > Bulk manage content**.
2. On the **Bulk manage content**, select the content items to which you want to apply the changes.
3. Click an action icon in the menu above the item list. You can do one of the following:

Options	Description
<b>Add tags</b>	Applies the same tags to all of the selected items.
<b>Add categories</b>	Applies the same categories to all of the selected items. You won't be able to select this if categories are not set up in your community.
<b>Set outcomes</b>	Applies the same outcomes, such as Outdated or Final, to all of the selected items.
<b>Move</b>	Moves all of the selected items to the new place you choose.
<b>Delete</b>	Deletes all of the selected items.

4. In the dialog box, review the list of items. If necessary, click **Remove** next to an item to remove the item from the list.
5. Click **Continue**. You may need to click another **Continue** depending on the option you selected.
6. Depending on the selected action, specify the settings or once again review the issue list.
7. Click **Continue**.

The selected action is performed, and the results are displayed in the dialog box.

8. Click **Close** to close the dialog box.

## Managing place categories

You can create a list of categories for describing places. These categories can be used as a filter when browsing places.

---

**Fastpath: Admin Console: System > Settings > Place Categories**

---



Place categories provide a useful way for community managers to classify places, so users have an easier time finding them when searching and browsing. These categories are created in the Admin Console, and can then be applied to any place in the place settings when creating or editing a place. A community can have up to 12 categories defined.

Note that the place categories are different from the categories used to classify content inside places. For more information, see [Managing content categories from the Admin Console](#).

To manage place categories:

1. In the Admin Console, go to **System > Settings > Place Categories**.
2. Create a list of categories by clicking **Add a category**, typing a category name in the field, and clicking **Save**.
3. If you want to hide a category from users who are creating and editing places, click **Hide**.

Hiding a category also makes it invisible when browsing by category. If you choose to show the category later, it will become visible again in all these locations.

4. If you want to delete a category from the list permanently, click **Delete**.
5. When your list of categories is the way you want it, click **Save** to apply your changes.

The changes in place categories are applied to the community site.

## Managing content categories from the user interface

Content categories are words or phrases an administrator provides for users to classify content in a place. Content categories can be specified for a place from the Admin Console or the user interface.

As a place administrator, you define categories in a way that's meaningful inside the particular place. As you create categories, think about how the place's content should be grouped. You can add up to 30 categories to a place.

Additionally, you can associate tags with categories. The usage here is two-fold when creating a new category: Jive can apply it to all content items with the tags specified – or apply it to all content items in a place. Later, when a tag is associated with a category, someone who uses this tag to label content in the place sees the category name highlighted. This is a cue to consider assigning the content to the category.

By managing the list of categories, you can help ensure that content is organized in the best way for people using the place. Content categories are created and managed in the user interface (all types of places) or in the Admin Console (spaces only). For more information on creating tags from the Admin Console, see [Managing content categories from the Admin Console](#).

Content categories differ from the place categories that are used to classify places. For more information about place categories, see [Managing place categories](#) on page 346.

To create categories:

1. Go to your place if don't have it open.
2. Select **Manage > Categories** to open the **Manage Categories** dialog box.





3. Click **Add new category** to open the **Add new category** dialog box.
4. In **Name**, specify the category name.
5. To associate this category with specific tags:
  - a. In **Tags**, specify the related tags.

The most popular tags used in this place are listed below.
  - b. If want to also apply this category to the existing content items with these tags, select the **Apply this new category to all content using the suggested tags?** check box.
6. To apply this category to all content items of the place, leave the **Tags** field empty and select the **Apply this new category to all content using the suggested tags?** check box.
7. Click **Save** to add the new category to the list.
8. Adjust the category position in the list by using arrows on the right to move the categories in the list.
9. Click **Finished** to save the list and apply the categories to content items.

The categories you've set up become available to the users of your place.

To edit categories:

1. Go to your place if don't have it open.
2. Select **Manage > Categories** to open the **Manage Categories** dialog box.
3. To edit a category, click  next to the category, change the settings, and then click **Save**.
4. To change the order of categories, use arrows next to categories to move them in the list.
5. To delete a category, click  next to the category.
6. When you're finished making changes to the categories list, click **Finished**.

The changes to the categories list are applied and the updates become available to the users.

## Managing content categories from the Admin Console

Content categories are words or phrases an administrator provides for users to classify content in a place. Content categories can be specified for a place from the Admin Console or the user interface.

---

**Fastpath: Admin Console > Spaces > Management > Categories Management**

---

As a place administrator, you define categories in a way that's meaningful inside the particular place. As you create categories, think about how the place's content should be grouped. You can add up to 30 categories to a place.

Additionally, you can associate tags with categories. When a tag is associated with a category, someone who uses this tag to label content in the place sees the category name highlighted. This is a cue to consider assigning the content to the category.

By managing the list of categories, you can help ensure that content is organized in the best way for people using the place. Content categories are created and managed in the user interface or in the Admin Console.

Content categories differ from the place categories that are used to classify places. For more information about place categories, see [Managing place categories](#) on page 346.

To manage categories from the Admin Console:

1. In the Admin Console, go to **Space > Management > Categories Management**.
2. Click **change space**, and then select the space for which you want to add content categories.
3. To create a new category:
  - a. Select a space and then click **Create New Category**.
  - b. Enter the new category's name and description.
  - c. Enter the tags that should be associated with this category. When people attempt to assign these tags, they'll be prompted to assign the associated category.
  - d. Click **Save**.
4. To edit an existing category:
  - a. Under **Categories**, locate the category you want to edit.
  - b. Click the category's edit icon.
  - c. Edit the category properties as needed.
  - d. Click **Save**.

## Managing tile categories

You can manage the categories of tiles that are available when creating places, and create your own categories for displaying new tiles.

---

**Fastpath: Admin Console: Add-ons > Tile Categories**

---

You may find that you don't want to make the full range of tiles available to users who create places, or you may have created some tiles of your own that you'd like to organize in categories when they're displayed in the UI. You can use the Admin Console to create new categories for tiles and to hide tile categories that you don't want users to see.

To manage tile categories:

1. In the Admin Console, go to **Add-ons > Tile Categories**.
2. To create a new category, click **Add a category** and type the name in the list.

3. To hide a category from users who are creating new places, including all the tiles it includes (unless they're also in another category), click **Hide Category**.

Hiding a category does not affect places that have already been created. Places that are already using tiles in a category you've hidden will still use them, but they won't be selectable to users who are creating or modifying a place.

For example, hiding the Places tile category will hide all the tiles that are unique to that category, and users won't see Places tiles as an option when they're adding tiles. However, they'll still see the Key Places and Content tile because it is also part of the Content category. You might find the Tile Reference ([Place tile reference](#) on page 318) helpful when managing tiles categories.

4. To delete a category from the list (and make it invisible to users who are creating and editing places), click **Delete Category**. The category will be marked for deletion.

You won't be able to delete the built-in Jive categories, but you can still hide them if you don't want to use them.

5. When your list of categories is the way you want it, click **Save** to apply your changes.

The categories you selected are hidden or deleted, the new categories are created.

Note that deleting a category does not affect places that have already been created. Places that are already using tiles or templates in a category you've deleted will still use them, but they won't be selectable to users who are creating or modifying a place.

## Managing spaces

*A space is a place for content, including documents, discussions, and blogs. A space can also contain projects, polls, tags, and announcements. You can create and configure spaces, setting up defaults for content and managing discussions and documents.*

Spaces are typically arranged in a hierarchy that reflects how the community's users are organized. For example, a human resources department might have its own space, with sub-spaces for content related to benefits and recruiting. Spaces provide the context for organizing content, sharing information, collaborating, and generally getting things done. For more information about different types of places, see [Jive places: spaces, groups, and projects](#).

### Designing space hierarchies

One of the first things you do when setting up your community is to create spaces and sub-spaces in a hierarchy that reflect your organization's functional areas or interests.

A good way to design spaces is to match how your company organizes functional teams and projects. For example, at a high level, spaces could reflect organizational divisions, such as Human Resources and Marketing.

Sub-spaces are likely to reflect organizational subdivisions, but they could also mirror areas of interest or other more informal boundaries. For example, you might create a Sales space for the Sales department, and then create sub-spaces such as Channel Sales, Business Development, and Direct Sales. Other criteria by which to define sub-spaces include functional area and topic.

As you define spaces, keep in mind:

- Before adding spaces to the system, you might want to collect information about roles for those who should have special permissions — such as blog authors, moderators, and so on. As you create spaces and sub-spaces by using the Admin Console, you'll be prompted for this information.
- Each space and sub-space can have different sets of permissions so that you can control access and capabilities within a space.
- When defining spaces and sub-spaces, make sure that the divisions and hierarchy are intuitive to people. You might start by looking at how people and teams are organized. You could also create a suggested space and sub-space hierarchy and get user feedback on it.
- Create a general, high-level hierarchy to get started. After people are involved, they refine the categorization by using tags. Generally, a significant numbers of spaces and sub-spaces tend to create a lot of unused content and reduce the impact of tagging.
- Define spaces with the role of tags in mind. Spaces organize content, but over time tags grow to constitute virtual groups used to organize content. As people apply tags to content, for example, a tag such as Personal might come to mean "a blog post or document that isn't connected with the company's business." This is probably a better way to categorize personal posts than a Personal sub-space would be.
- For usability reasons, avoid creating a large number of spaces. With a significant number of spaces, certain elements in the user interface can become difficult to use. These include lists (including drop-down lists) that display the names of all the spaces.

## Renaming root space

You can change the name and description of the root space from the Admin Console. By default, the root space is named `Main`.

---

**Fastpath:** **Admin Console: System > Settings > Space**

---

To change the name of the root space:

1. In the Admin Console, go to **System > Settings > Space** .
2. On the **Space Settings** page, in **Space Name**, enter the community name.
3. Optionally, in **Space description**, enter the space description.
4. Click **Save Settings**.

The root space becomes available under new name throughout the application, for example, when you need to select a place.

## Space creation options

You have several options when setting up a space.

### Space landing page

The main space page is defined by the types of pages enabled for the space.

Enabled pages	Landing page
Activity + Pages	The leftmost page in the navigation menu. You change as order of the pages, as described in <a href="#">Managing page navigation in places</a> on page 280.
Overview only	Overview page
Activity + Overview	Defined during space setup (under <b>Advanced options</b> in the <b>Create Space</b> or <b>Edit Space</b> dialog box)

### Advanced space creation options

In the following table, the asterisks (\*) note when this advanced option for place navigation might be unavailable. For more information on differences between Activity and Overview pages, see [Understanding pages in places](#) on page 272.

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

I want to . . .	You should . . .	Can I change this later?
Design a landing page that's optimized for a specific work purpose.	Create a group, then for the Activity page choose and configure a Place Template customized for the kind of work you want to do. For more information, see <a href="#">Designing activity and custom pages for places</a> on page 275. Place Templates only apply to Activity pages.	Yes.
Design a landing page with widgets*	Select <b>Overview</b> or <b>Activity + Overview</b> under the <b>Advanced options</b> during set-up, and fill out a widget layout under <b>Manage &gt; Overview page</b> from the group page. For more information, see <a href="#">Designing Overview pages for places</a> on page 329.	Yes.

I want to. . .	You should. . .	Can I change this later?
Make more custom pages in the place for displaying information, not just a landing page.	Create the group, and then add the pages to your place afterward. See <a href="#">Adding custom pages to places</a> on page 276.	Yes.
Integrate external streams from Facebook, Chatter, or any other apps your community admin has enabled.*	Create the group, then click <b>Add a stream integration</b> when configuring the Activity page. For more information, see <a href="#">Adding tiles with external stream integrations to Activity page</a> on page 279.	Yes, but keep in mind that some external stream types cannot be disconnected from the group except via a case with <a href="#">Support</a> .
Limit the kinds of content that can be included in this place.	During place setup, after you preview the group, edit the Activity page.	Yes.
Store the place binary documents outside Jive, for example, in Box or SharePoint.	During place setup, after you preview the topic, edit the Activity page. External file storage is available if at least one storage provider has been set up by community administrators. For more information, see <a href="#">Using external file storage</a> on page 103.	Yes, but if the place is later disconnected from external storage, users will see references to documents that they can't access from Jive anymore.
Make sure people can find the place.	Add tags and place categories to your place in the place settings.	Yes. Just remove or replace the tags or place categories.

## Creating new space from Admin Console

Creating several spaces quickly is easier from the Admin Console, although you can create spaces from the user interface as well. After the space is created, you can apply place templates from the user interface.

---

**Fastpath: Admin Console: Spaces > Management > Summary**

---

You can apply place templates to the Activity page for each space later, or create Overview pages for them if you choose. For more information, see [Designing activity and custom pages for places](#) on page 275.

To create a space from the Admin Console:

1. In the Admin Console, go to **Spaces > Management > Summary**, and then select the **Browse** tab.
2. To create a new space, click the name of the space that will contain it, then click **New**.
3. On the **Create New Space**, in **Space Name**, enter the space name to appear in the user interface.



4. In **Description of space**, enter a description to appear in the user interface, such as a brief description of what the space is for.
5. In **Space Display Name**, enter the text to be used in space URLs.
6. Under **Permissions**, choose a default access scheme.

Each of the options represents a set of permissions that you can also edit later.

7. Under **Content**, select the content types you want to be available in the space.
8. Click **Create**.

The space is created with the specified settings. You can change the place settings from the user interface.

For information about using place templates, see [Designing activity and custom pages for places](#) on page 275.

### Creating new space from user interface

Creating spaces from user interface let you fully set up the space, apply place templates, and configure the space Activity page.

When you create a space from the user interface, the Activity page is used as the landing page by default. You can apply a space template to the page or configure it yourself. If you choose, you can also add an Overview page to the space. For more information, see [Designing activity and custom pages for places](#) on page 275.

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

---

**Note:** Creating several spaces quickly is easier from the Admin Console, as described [Creating new space from Admin Console](#) on page 353.

---

To create a space:

1. In the user interface, click



> **Space** , and then select the place where you want to create the space.

- If you want to space, select the root space. By default, the root space is called *community*.
- If you want to create a sub-space, select the parent space.

2. In the **Create Space** dialog box, in **Name**, enter the space name to appear in the user interface.
3. In **Description**, enter a brief description to appear in the user interface.  
For example, a Marketing space might say "A home for all of our marketing teams."
4. In **Tags**, enter tags to be used when searching for the space.

5. In **Categories**, select the space categories to be used when searching for the space.

---

**Note:** This is available if place categories have been configured in the community. For more information, see [Managing place categories](#) on page 346.

---

6. If available, click **Advanced Options** to expose more options.

Your place uses an Activity page as its main page by default, with the option to add more custom pages. We recommend using an Activity page because it can be displayed on mobile devices and because it's more friendly to streaming content. If widgets are enabled in your community, you may want to include an Overview page with widgets or Activity and Overview pages.

7. When you're finished, click **Create Space**.

With the space created, you can customize it to your requirements. Note that the Team Collaboration template is used to populate the space banner and the tiles and streams on the Activity page. You can change the template to update the theme of your space.

For more information, see [Designing activity and custom pages for places](#) on page 275 and [Designing Overview pages for places](#) on page 329.

## Arranging space hierarchy

You can view the list of spaces and organize the space hierarchy in the Admin Console.

---

**Fastpath:** **Admin Console: Spaces > Management > Summary**

---

You can view the list of all spaces and subspaces of your community in the Admin Console. You can add new spaces, change the order of spaces under one parent space, move spaces to other parent spaces, edit general space settings, and delete spaces.

---

**Note:** You can't move or delete the root space.

---

To arrange spaces in the hierarchy:

1. In the Admin Console, go to **Spaces > Management > Summary**.
2. To create a new space, select the parent space for the new space, and then click **New**.

For more information, see [Creating new space from Admin Console](#) on page 353.

3. To edit space properties, select the space and click **Edit**.

For more information, see [Setting up general space settings](#) on page 356.

4. To move a space to another parent space, select the space and click **Move**.

Then select a new parent space in the dialog box, and click **Move Space**.

5. To delete a space and all content inside it, click **Delete**.



Before the space is deleted, you'll get a warning with notes about what deletion means, along with a summary of the amount of content inside the space you're deleting.

## Configuring spaces

Some of the space parameters you can configure only by using the Admin Console.

### ***Setting up general space settings***

You can change a space's name and description if the space focus changes. You can also change its display name, which is the name used in URLs that link to the space.

---

**Fastpath: Admin Console: Spaces > Settings > Space Settings**

---

The *display name* is the text displayed at the end of the space's URL in the browser's address bar. For some people, using the space URL is a quick way to get to the space. Note that you can't change the display name for the root space.

You can change the space's locale setting to set user UI characteristics, such as language and date format. Note that this locale setting applies to one of several locale behaviors. For more information on how the locale is chosen for displaying to the user, see [Setting up locale and time zone](#) on page 29.

You can also specify the content types the space and its sub-spaces supports. For more information, see [Setting up allowed content types for spaces](#) on page 356.

### ***Setting up allowed content types for spaces***

You can set which content types a space supports, and hide the others.

---

**Fastpath: Admin Console: Spaces > Settings > Space Settings**

---

Spaces can support a variety of content types, which you can configure. For example, by clearing the Documents check box, you'll remove the Create > Document link from the space's Actions list. In addition, users won't be able to select that space from the place picker before posting a new document.

---

**Caution:** If users have created documents in the space already, and then you clear the Documents check box to remove support for them, existing documents will no longer be viewable in the space (although they'll still exist).

---

### ***Configuring discussions for spaces***

Within a space, you can configure question settings. These settings define how alerts are sent for questions that remain unanswered.

---

**Fastpath: Admin Console: Spaces > Settings > Discussion Settings**

---

**Note:** For more information about application-wide discussion settings, see [Configuring discussions application-wide](#) on page 90.

Option	Description
<b>Enable Email Alerts</b>	Indicates if an email sent when a thread marked as a question has remained open (unanswered) for the period of time you specify. You might want to enable alerts if you want to make sure that questions get prompt responses. Email is sent to the people whose addresses you give in the <b>Email Addresses</b> box.
<b>Open Question Age</b>	The period after which email is sent. Specify a value that makes sense for your community. If it's a very active community, you might want to make this shorter.
<b>Email Addresses</b>	The recipient's email address.

### ***Setting up document approver in space***

With a space approver assigned, users submit a document for approval before it is published.

**Fastpath:** **Admin Console: Spaces > Settings > Document Settings**

You can specify someone to approve all documents created in a space before the documents can be published and made visible to other users. The space approvers are set in the Admin Console as a setting for each space.

**Note:** A space approver only approves documents in a space. If you want to control more than documents, use the moderation feature. For more information, see [Moderation](#) on page 416.

### **Setting up space approvers**

To add a space approver:

1. In the Admin Console, go to **Admin Console: Spaces > Settings > Document Settings**.
2. Click **change space**, and select the space where you want to add the approver.
3. In **Add User**, enter the user name.

You can also browse for users by using the **Select People** dialog box.

4. Click **Save Changes**.

The user is added as the document approver of the space. You can add more approvers as required.

## How space approval works

1. A user creates a document in the space.
2. The user clicks **Send for approval**, and the document goes into an approval queue. The document isn't actually sent anywhere but is marked for approval by the application.
3. The approver is alerted in their Inbox that something needs approval.
4. The approver can view the document, and then approve or reject it.
  - If they approve it (and if all other approvers approve it), the document is published.

---

**Note:** All approvers must approve before the document is published.

---

- If they reject it, they can enter an explanation, and the document is sent back to the author as a draft. The author then can edit and resubmit the document.

Note that a document can also have document-level approvers designated by the author when creating the document. For more information, see [Document approval](#) in the User Guide.

### **Setting up abuse reporting**

When abuse reporting is enabled, people can use a link on content to report the content as abusive.

---

**Fastpath: Admin Console: Spaces > Settings > Abuse Settings**

---

When abuse reporting is enabled, people can use a link on content to report the content as abusive. When someone clicks the link, the content is sent to the moderator's queue so that it can be evaluated; while the content is waiting to be approved, it is displayed.

Abuse reporting is a system-wide, global setting: if it's enabled, it is available for every piece of public or private content on which abuse can be reported.

To set the threshold after which the offending content should be hidden until the moderator can review it, use the **Automatically hide content after** setting. For example, if you set this value to five, and then five users flag the same piece of content for abuse, the content is removed from view pending moderation. By default, all content types (such as discussions, blogs, and documents) are handled in the same way when abuse is reported.

Note that the application does not send email notifications to moderators for abuse reports. To keep up with abuse reports, moderators and administrators should check their moderation queue. For more information on moderating content in the queue, see [Setting up content moderation](#).

Abuse for Contained Content Types

Here you find the chart of abuse rules for contained content types.

The following table shows the types of content that can be configured for abuse reporting, who moderates abuse reports and the order in which Jive notifies the abuse reports moderators. When abuse reporting is enabled in a place, the application sends a moderation notification to the first valid moderator it finds. Click on an image to enlarge it.

For example, if you set up a moderator for abuse in an open social group, Jive first looks for a Global Moderator. If there is none assigned, it then looks for a Full Access moderator. For more information on moderator roles, see [Moderator roles](#).

**Table 22: Chart of abuse rules for comments on content**

	Polls	Docu- ments	Discus- sions	Blog posts	Videos	Ideas	Status updates
Root con- tainer	1. Global modera- tor 2. Full access	Cont type not avail- able		1. Global modera- tor 2. Full access	Cont type not avail- able		1. Global modera- tor 2. Full access
Open and mem- ber so- cial groups	1. Global moderator   2. Full access						Content type not available
Private and se- cret so- cial groups	1. Full access						Content type not available
Spaces and sub- spaces	1. Space moderator   2. Global moderator   3. Full access						Content type not available

	Polls	Documents	Discussions	Blog posts	Videos	Ideas	Status updates
Projects	1. Space moderator 2. Global moderator 3. Full access						1. Global moderator 2. Full access
Your personal content	<ul style="list-style-type: none"> <li>If visibility is All, then 1. Global moderator 2. Full access</li> <li>Otherwise, 1. Full access</li> </ul>			1. Global moderator 2. Full access	<ul style="list-style-type: none"> <li>If visibility is All, then 1. Global moderator 2. Full access</li> <li>Otherwise, 1. Full access</li> </ul>		Content type not available

Announcement content type is not available.

Abuse for comments on content

Here you can find the chart of abuse rules for comments on content.

The following table shows comments to the content types that can be configured for abuse reporting, who moderates abuse reports and the order in which Jive notifies the abuse reports moderators. When abuse reporting is enabled in a place, the application sends a moderation notification to the first valid moderator it finds. Click on an image to enlarge it.

For example, if you set up a moderator for abuse in an open social group, Jive first looks for a Global Moderator. If there is none assigned, it then looks for a Full Access moderator. For more information on moderator roles, see [Moderator roles](#).

**Table 23: Chart of abuse rules for comments on content**

	Poll comments	Document comments	Discussion replies	Blog comments	Video comments	Idea comments	Status comments
Root container	1. Global moderator 2. Full access						
Open and member social groups	1. Global moderator 2. Full access						

	Poll com- ments	Docu- ment com- ments	Discus- sion replies	Blog com- ments	Video com- ments	Idea com- ments	Status com- ments
Private and se- cret so- cial groups	1. Full access						
Spaces and sub- spaces	1. Space moderator 2. Global moderator 3. Full access						Content type not available
Projects	1. Space moderator 2. Global moderator 3. Full access						1. Global modera- tor 2. Full access
Your per- sonal content	<ul style="list-style-type: none"> <li>If visibility is All, then 1. Global moderator 2. Full access</li> <li>Otherwise, 1. Full access</li> </ul>			1. Global modera- tor 2. Full access	<ul style="list-style-type: none"> <li>If visibility is All, then 1. Global moderator 2. Full access</li> <li>Otherwise, 1. Full access</li> </ul>		Content type not available

### ***Archiving discussion threads***

You can clean up old discussion content in your community by archiving it.

---

**Fastpath: Admin Console: Spaces > Settings > Thread Archive Settings**

---

When you turn archiving on for discussions in a space, you can specify how old a thread should be before it's archived and whether archived threads are deleted or moved to another space. For example, you could create a space for holding archived threads.

### ***Exposing discussions on another site***

You can expose certain discussions from your Jive community through web pages that aren't part of Jive by using the Community Everywhere feature.

---

**Fastpath: Admin Console: Spaces > Settings > Community Everywhere**

---

For example, if you've got a web site that describes products offered by your company, you might want to expose discussions related to tips for using the products. Visitors to your product page would be able to view a link to discussions in Jive and optionally see recent posts as well as a box for adding comments.

If you want to encourage people to participate in your Jive community, Community Everywhere can be a useful enticement. In the Admin Console, you can enable the feature, limit the sites that can use it, and generate the script code needed to add Community Everywhere links to web pages.

### About Community Everywhere

With Community Everywhere, you can embed discussion threads directly into existing news articles, blog posts, or other content that would benefit from comments or discussions.

Instead of forcing users to leave your content to create a comment or view a discussion thread, you can use Community Everywhere to enable users to log in or create an account and participate in discussions remaining on the page that contains your content.

Community Everywhere embeds your discussion threads using JavaScript: first you enable Community Everywhere via the Admin Console, then you generate a unique key for each one of the articles you want to embed discussions on, and, finally, you insert a JavaScript `<script>` tag into the pages that you want discussions to be shown.

You should set up Community Everywhere in this order:

1. Set up the feature in your community, as described in [Setting up Community Everywhere](#) on page 362.
2. Generate the HTML code to be used on another site, as described in [Generating script for Community Everywhere](#) on page 363.
3. Embed the generated code to the web page where you want to expose content from your community, as described in [Using Community Everywhere](#) on page 365.

### Setting up Community Everywhere

Before you can use Community Everywhere, you must first enable and configure it in the Admin Console.

---

**Fastpath: Admin Console: Spaces > Settings > Community Everywhere**

---

You can optionally choose to limit the sites that embed discussions by entering a comma-delimited list of referrers that should be allowed to embed discussions. Each of the referrer values must begin with `http://` or `https://`. You can also specify a user to be used as the author of the threads that are generated by your content (note that users of your application will only be able to create replies and messages to threads which are generated automatically by Community Everywhere).

- If you choose to disable the Community Everywhere feature after it has been used for a while, the feature displays an error message stating that *Comments have been disabled by the system administrator*.
- If a user attempts to use the Community Everywhere feature from a web site that you haven't explicitly allowed in the referrer list, the Community Everywhere feature displays an error message stating that *This site is not authorized to access the Community Everywhere feature*.

To enable and configure Community Everywhere:

1. In the Admin Console, go to **Spaces > Settings > Community Everywhere**.
2. Under **Community Everywhere Enabled**, select **Enabled**.
3. If required, in **Restrict Referers To**, enter the sites where referrers must be allowed.

The list must be comma-delimited. Each of the referrer values must begin with `http://` or `https://`.

4. If required, in **System User**, specify the user to be used as the author of the threads.
5. Click **Save Settings**.

After you enabled the Community Everywhere feature, you can proceed to generate a script for embedding, as described in [Generating script for Community Everywhere](#) on page 363.

Generating script for Community Everywhere

After you have enabled the Community Everywhere feature, you use the Script Generator to create URLs that you can embed in your site.

---

**Fastpath: Admin Console: Spaces > Settings > Community Everywhere**

---

You can use the **Script Generator** section to generate the JS code for embedding. There are options for the amount of content you can show:

- **Display "Discuss This" Link:** Choosing this option results in only a link back to your community to a thread created from this piece of content. If a user posts a



reply message, the reply and any other messages will not be displayed with the content.

- **Display "Discuss This" Link and Recent Posts:** Choosing this option shows a link to your community to a thread created from this piece of content and shows the messages (if any) in the thread.
- **Display "Discuss This" Link, Recent Posts, and Comment Box:** Choosing this option shows a link to your community to a thread created from this piece of content, shows the messages (if any) in the thread and shows a comment box giving users the ability to create comments on the piece of content.

The Script Generator gives you four display options for the content generated from the choice you made about the content to display:

- **View Threaded:** Enables you to choose the number of replies to be displayed alongside your content. The default is to display all the replies. Clear the check box to limit the number of replies to five, ten, fifteen, twenty, or twenty-five.
- **Show Discussion Statistics:** Select this option to have Community Everywhere display the total number of replies and the date and time of the last reply. For example, the message could look like this: 2 message(s). Last at: Feb 28, 2007 12:48:36 PM.
- **Open Link in New Window:** Select this option to have Community Everywhere force the opening of a new window when the user clicks on the Discuss This link.
- **Include Default Style (CSS):** Select this option to have Community Everywhere include style markup by using CSS in the list of replies and comment box.

The Script Generator requires you to choose the space or community that you want the thread to be generated in and lets you generate a unique key for each piece of content.

After you've settled on all the options, you can copy the text in the **Code** section and paste it into the HTML of the content that you want the Community Everywhere feature to be embedded in. For more information, see [Using Community Everywhere](#) on page 365.

Finally, the Community Everywhere feature gives you the ability to choose a custom title and description for the thread that is automatically generated by the system. You can do this in one of the following ways:

- by including two meta tags in the `<head>` of your document:

```
<meta name="jiveTitle" content="A discussion about Tiles Foo"/>
<meta name="jiveDescription" content="Add your thoughts
about the Tiles Foo article below."/>
```
- by including a snippet of JavaScript code in your document:

```
<script language="JavaScript" type="text/javascript">
    var jiveTitle = "A discussion about Tiles Foo";
    var jiveDescription = "Add your thoughts about the Tiles
    Foo article below.";
</script>
```

## Using Community Everywhere

To get the content from a place to a web page, you should copy the generated script to the HTML code of the web page.

After you've completed the configuration steps in [Setting up Community Everywhere](#) on page 362 and [Generating script for Community Everywhere](#) on page 363, you're ready to embed the Community Everywhere feature into your content. To do so, cut and paste the `<script>` tag in the text box into your page.

As an example, let's say you had an article about Tiles Foo on your site:

```
<p>
  Tiles Foo is the greatest tool on the planet. You should buy one now.
</p>
```

And you want to include a discussion form and replies below your content. You would go the Admin Console, enable Community Everywhere, choose the content and display options you want, and click **Generate New Key**. You would then copy and paste the `<script>` tag from the **Code** section into your content. The end result would look something like this:

```
<p>
  Tiles Foo is the greatest tool on the planet. You should buy one now.
</p>

<script language="JavaScript" type="text/javascript"
  src="http://our-community/everywhere/1801?community=2003&key=TGFu9V">
</script>
```

### ***Fine-tuning with extended properties***

Extended properties are name-value pairs that configure particular aspects of a space.

---

**Fastpath:** Admin Console: Spaces > Settings > Extended Properties

---

Many of these are tied to other settings in the Admin Console so that changing the value in the console changes the value of the corresponding property. You might also change an extended property value if the change is part of a larger effort to customize Jive. For more information, see [Fine-tuning with system properties](#) on page 240.

---

**Attention:** We recommend that you leave properties unchanged unless you're asked to change it by Jive's support team.

---

---

**Note:** Names and values of system properties and extended properties are case-sensitive.

---

## Managing content in spaces

From the Admin Console, you can access discussions and documents in a space. Also, you can manage space categories and merge space. A few of these features are also available in the user interface.

Note that the settings you make at the root level apply to all social groups as well. From the document- and discussion-management perspective, you can think of social groups as being contained at the root. For more information, see [Jive places: spaces, groups, and projects](#).

### *Managing discussions*

Space administrators can view a list of the discussions in a space, and edit or delete them by using the Admin Console.

---

**Fastpath:** Admin Console > Spaces > Management > Discussion Management

---

As a space administrator, you're also able to edit or delete discussions when you're viewing them in the community.

Moderators have the ability to edit and delete discussions in a space. For more information about moderation, see [Moderation](#) on page 416.

### *Managing documents*

From the Admin Console, as a space administrator, you can view a list of all space documents and edit, restore, or delete them.

---

**Fastpath:** Admin Console > Spaces > Management > Document Management

---

If a user deletes a document, you can still see the document in the Admin Console. You can either restore the document by editing and publishing it, or you can permanently delete it from the community.

## Important notes

- A space administrator can edit or delete that space's documents when viewing them in the community.
- Content moderators also have the ability to edit and delete documents, as well as make other changes. For more on moderation, see [Moderation](#) on page 416.
- As an administrator, you may move a document from one space to another. However, users who need that document may not have document viewing permissions in the new space.

### *Managing content categories from the Admin Console*

Content categories are words or phrases an administrator provides for users to classify content in a place. Content categories can be specified for a place from the Admin Console or the user interface.

---

**Fastpath:** Admin Console > Spaces > Management > Categories Management

---

As a place administrator, you define categories in a way that's meaningful inside the particular place. As you create categories, think about how the place's content should be grouped. You can add up to 30 categories to a place.

Additionally, you can associate tags with categories. When a tag is associated with a category, someone who uses this tag to label content in the place sees the category name highlighted. This is a cue to consider assigning the content to the category.

By managing the list of categories, you can help ensure that content is organized in the best way for people using the place. Content categories are created and managed in the user interface or in the Admin Console.

Content categories differ from the place categories that are used to classify places. For more information about place categories, see [Managing place categories](#) on page 346.

To manage categories from the Admin Console:

1. In the Admin Console, go to **Space > Management > Categories Management**.
2. Click **change space**, and then select the space for which you want to add content categories.
3. To create a new category:
  - a. Select a space and then click **Create New Category**.
  - b. Enter the new category's name and description.
  - c. Enter the tags that should be associated with this category. When people attempt to assign these tags, they'll be prompted to assign the associated category.
  - d. Click **Save**.
4. To edit an existing category:
  - a. Under **Categories**, locate the category you want to edit.
  - b. Click the category's edit icon.
  - c. Edit the category properties as needed.
  - d. Click **Save**.

### ***Managing content categories from the user interface***

Content categories are words or phrases an administrator provides for users to classify content in a place. Content categories can be specified for a place from the Admin Console or the user interface.

As a place administrator, you define categories in a way that's meaningful inside the particular place. As you create categories, think about how the place's content should be grouped. You can add up to 30 categories to a place.

Additionally, you can associate tags with categories. The usage here is two-fold when creating a new category: Jive can apply it to all content items with the tags specified – or apply it to all content items in a place. Later, when a tag is associated with a category, someone who uses this tag to label content in the place sees the category name highlighted. This is a cue to consider assigning the content to the category.

By managing the list of categories, you can help ensure that content is organized in the best way for people using the place. Content categories are created and managed in the user interface (all types of places) or in the Admin Console (spaces only). For more information on creating tags from the Admin Console, see [Managing content categories from the Admin Console](#).

Content categories differ from the place categories that are used to classify places. For more information about place categories, see [Managing place categories](#) on page 346.



To create categories:

1. Go to your place if don't have it open.
2. Select **Manage > Categories** to open the **Manage Categories** dialog box.
3. Click **Add new category** to open the **Add new category** dialog box.
4. In **Name**, specify the category name.
5. To associate this category with specific tags:
  - a. In **Tags**, specify the related tags.

The most popular tags used in this place are listed below.
  - b. If want to also apply this category to the existing content items with these tags, select the **Apply this new category to all content using the suggested tags?** check box.
6. To apply this category to all content items of the place, leave the **Tags** field empty and select the **Apply this new category to all content using the suggested tags?** check box.
7. Click **Save** to add the new category to the list.
8. Adjust the category position in the list by using arrows on the right to move the categories in the list.
9. Click **Finished** to save the list and apply the categories to content items.

The categories you've set up become available to the users of your place.

To edit categories:

1. Go to your place if don't have it open.
2. Select **Manage > Categories** to open the **Manage Categories** dialog box.
3. To edit a category, click  next to the category, change the settings, and then click **Save**.
4. To change the order of categories, use arrows next to categories to move them in the list.
5. To delete a category, click  next to the category.
6. When you're finished making changes to the categories list, click **Finished**.

The changes to the categories list are applied and the updates become available to the users.

## Merging spaces

You can merge the content from one space into another space. This can be a useful way to remove spaces that are no longer needed as spaces, but whose content you still want to keep.

---

**Fastpath:** **Admin Console > Spaces > Management > Merge Spaces**

---

You need to be a space administrator for both spaces to merge content from one to another. Merging content moves all of the content into the destination space, mixing it with content that's already in the destination space. The space you're merging from is deleted after the merge.

---

**Note:** You can't merge the root space into another space.

---

To merge the content from one space into another space:

1. In the Admin Console, go to **Spaces > Management > Summary**.
2. In the list of spaces, click the name of the space you want to merge from.
3. Click **Merge Spaces**.

The Merge Space page displays a summary of content in the space.

4. Click the name of the space you're merging content into.

This begins the merge. The space you're merging from is deleted during the merge.

## Managing external groups

Jive provides external access for *private* and *secret* groups. With externally accessible groups, you can add external contributors by using group invitations or LDAP and you can restrict who can create external groups.

---

**Note:** While external contributors can use groups much the same way standard community users can with certain restrictions, they can never become group owners. For more information, see [What can external contributors see?](#) in the Jive 9.x User Help.

---

For more information about working with a community as external contributor, see [Contributing to community as external user](#) in the Jive 9.x User Help.

## Enabling external groups

Group owners can make private and secret (also known as private unlisted) groups accessible to outside contributors if this feature is enabled in your community.

---

**Fastpath:** **Admin Console > System > Settings > Externally Accessible Groups**

---



In an externally accessible group, group members (both external contributors and standard community users) can invite external contributors to these groups.

When disabled after being enabled for a period, all content created by external contributors continues to exist, and external contributors continue to be visible in the community, but they are no longer able to log in.

By default, externally accessible groups are enabled.

---

**Note:** For more information about using SSO with external groups enabled, see [Mixed-mode authentication](#) on page 73.

---

To give users permission to create an externally accessible group:

1. In the Admin Console, go to **Admin Console > Permissions > Social Group Permissions**.
2. Assign specific users or user groups the permission to **create externally accessible groups**. For more information, see [Permissions for external groups](#) on page 370.

The users with the permissions assigned can see the option to Enable external access under the Advanced options when creating or editing a group in the user interface. For step-by-step instructions on creating a group with external access, see [Creating externally accessible groups](#) in the User Guide.

### Permissions for external groups

Jive provides the *Create externally accessible group* permission that allows users to create social groups with external access. The *Manage social group* permission also gives users this ability, but it also includes being able to manage any social group.

---

**Fastpath:** **Admin Console: Permissions > Social Group Permissions**

---

You can assign the *Create externally accessible group* permission to either individual users (user override) or groups of users (user groups). The user group must exist before you can assign it permissions.

For more information about managing permissions, see [Managing social group permissions](#) on page 395. For more information about managing user groups, see [Managing user groups](#) on page 402.

### Setting user group permission for externally accessible social groups

Generally, to set up a user group permission for creating and managing external social groups:

1. Create a new user group for the users who must be able to create externally accessible social groups on the **People > Management > User Group Summary** page. For more information, see [Creating user groups](#).
2. Assign the *Create externally accessible group* permissions to the user group created in Step 1 on page 370 on the **Permissions > Social Group Permissions** page. For more information, see [Setting up social group permissions for user groups](#) on page 396.

With the user group in place, you can manage users with the permission by adding them to the user group or removing them from the group. For more information, see [Adding and removing users to user groups](#) on page 404.

### Creating user overrides for social groups

Although creating user groups is preferable, you can assign the *Create externally accessible group* permissions to individual users.

To set up for creating and managing external social groups for particular users:

- Assign the *Create externally accessible group* user override to the users on the **Permissions > Social Group Permissions** page. For more information, see [Configuring user overrides to social groups](#) on page 397.

### Adding external contributors

Jive enables you to add external contributors either by inviting them to a group in your community or by adding them directly into the LDAP directory.

External contributors can either be invited by group members or you can use the Admin Console to add them into the LDAP directory. For more information on inviting users, see [Inviting external contributors](#) in the User Guide. For more information on adding users to the LDAP directory, see [Mapping users from a directory server](#) on page 57.

## Managing permissions

You can control user access to administrative settings, spaces, blogs, social groups, and content. To configure access, you grant or revoke permissions to individual users or groups of users that you define. You can use the standard permission levels included with the application or create your own.

### Overview of permissions by place

Permissions are different depending on the place you assign them — for example, in a space, blog, or social group.

<b>System Administration</b>	These permissions allow users administrative and moderation permissions to system-wide settings. Most of the permission levels available here provide access to the Admin Console. With the exception of the Full Access permission level, these don't provide access to content. You can't break out the bundled permissions in the administrative area (as you can with space permissions). For more information, see <a href="#">Managing System Administration permissions</a> on page 377.
<b>Spaces</b>	These permissions allow users administrative or content moderation permissions in a space. Projects contained by a space inherit the permissions of their container space. For more information, see <a href="#">Managing space permissions</a> on page 382.
<b>Blogs (global)</b>	These permissions allow users to view, create, and comment on global blogs, such as system and personal blogs, neither of which belong, strictly speaking, to a place. This leaves out blogs in spaces, social groups, and projects, whose permissions are



managed in different ways as described in [Managing blog permissions](#) on page 392.

**Social Groups** These permissions allow users to view and create social groups. Projects contained by a group inherit the permissions of their container group. For more information, see [Managing social group permissions](#) on page 395.

**Home Page** These permissions allow users to create and interact with content that can appear on the community's home page and in the user container, including announcements, polls, and videos. For more information, see [Managing Home Page Permissions](#) on page 398.

## Default permissions for content items

Here you can find a reference of the default permissions for content items.

Content item	All registered users can
Discussions	<ul style="list-style-type: none"><li>• View</li><li>• Create</li><li>• Comment</li></ul>
Documents, Blog Posts, Events, Ideas, Polls, and Videos	<ul style="list-style-type: none"><li>• View</li><li>• Create</li><li>• Comment</li></ul>
Avatars	Create up to five avatars*
Profile Images	<ul style="list-style-type: none"><li>• View</li><li>• Create</li><li>• Create up to 10 images*</li></ul>
User Profile Fields	<ul style="list-style-type: none"><li>• Edit and view all fields except the Mobile phone number field</li><li>• Mobile phone number field: Edit and view, but only Connections can view this by default</li></ul>

\* This is the default setting. It can be changed in your community.

## Overview of permission assignments

When assigning permissions, you follow these basic steps.

While you can assign permissions to individuals, you most likely need to assign the same permissions to several users in the form of a user group. Each user group you create can represent a different category of people, from a permissions perspective. For example, you might have user groups for administrators, managers, moderators, bloggers, people in the HR department, and people in the Products department. You create user groups based on how you want to structure access to your community and its features.

1. Create user groups, as described in [Creating user groups](#). Add user groups to different areas: system administration, spaces, social groups, blogs, and home page. For more information, see [Managing user groups](#) on page 402.
2. Assign permissions to user groups in one of the following ways:
  - a) Assign permission levels to groups. Note that administrative permissions and spaces have several bundled permissions levels. You can also create custom space permission levels. For more information, see [Overview of System Administration permission levels](#) on page 377 and [Overview of space permission levels](#) on page 383.
  - b) Assign one or more access permissions, as described in [Setting up permissions for user groups](#) on page 376. For blogs, social groups, and the rest, you assign access by choosing from a list of fine-grained options.
3. Assign permissions to individual users by creating user override for special cases, as described in [Creating user overrides](#) on page 376. For example, you might want all but one or two people in a particular user group to have the permissions you assigned to the group. For those one or two, you can create a user override that assigns specific exceptions.

## Overview of user groups

A Jive community includes three predefined user groups and you can create more user -groups for assigning permissions.

You can define a set group of users to quickly assign them a variety of permissions. Forming user groups that reflect the kinds of access to be granted lets you use a convenient, built-in way to manage people's access to application features.

For more information about user groups, see [Managing user groups](#) on page 402.

These groups can be defined in your community itself, in an external user identity system (such as an LDAP system), or in the application database. Additionally, several system-defined user groups are available by default.

## System-defined user groups: Everyone and All Registered Users

The application includes three user groups that are defined by the system: Everyone, All Registered Users, and All External Contributor Users. These are a good place to start when managing permissions that are in effect across the community. After you've figured out how permissions should be applied for these broad groups, you can start assigning permissions based to user groups you create.

---

**Note:** Administrators of internal communities, which are typically not licensed to permit public access to content, are not allowed to modify permissions on the Everyone group.

---

- **Everyone** includes anyone who visits the site, including anonymous users. Think about what you want people to be able to do anonymously, but weigh that against the need to engage people to encourage them to participate. Note that users who only view content are not counted among the number of users your license provides for.
- **All Registered Users** includes people who have entered registration information and logged in for access. Use this group when you want to ensure certain kinds of access go only to people who have an account on the system.
- **All External Contributor Users** includes external users who are not members of the community but have some access to community resources. For more information about external users, see [Managing external groups](#) on page 369.

## Your user groups

You can set up your own user groups. We recommend that these groups should reflect your community's structure. There could be relatively few user groups, with separate groups for those who manage, moderate, and administer the community. Or there could be many — for example, with groups representing departments in your organization, people with specific privileges (such as blogging), virtual teams within the organization.

## Creating user groups

You add user groups by creating and naming a group, then adding user accounts for each of the group's members. You should also add one or more user accounts as administrators for the group.

---

**Fastpath:** Admin Console: People > Management > Create User Group

---

You can assign role badges to groups. Role badges provide visual cues in the user interface that help people quickly identify community users and their responsibilities. For more information see [Adding and removing users to user groups](#) on page 404.

To create a user group:

1. In the Admin Console, go to **People > Management > Create User Group**.
2. Under **General Settings**, in **User Group Name**, enter a user group name.

The name should be meaningful and convey the group purpose, for example, HR\_bloggers or Support\_specialists.

3. In **Description (optional)**, enter the description of the user group.  
You should add the information about this group purpose and who is included in it.
4. If the group can be used as part of the News audience, select the **Visible to News Admins** check box.
5. If you want to use role badges, do the following:
  - a) Under **Role Badge**, select **Enabled**.
  - b) In **Badge Image**, browse and upload a 16 by 16 px image to be used as the role badge.
  - c) Select the role for the users in this user group from the following roles:
    - Administrator
    - Champion
    - Employee
    - Expert
    - Moderator
    - Support
6. Click **Create Group**.
7. Use the **Add Members** links to add user accounts of the members of the new user group. For more information see [Adding and removing users to user groups](#) on page 404.
8. Use the **Add Admins** links to add user accounts for users who have permission to administer the account. If you use the badge roles, they are not applied to the administrators. For more information see [Adding and removing users to user groups](#) on page 404.
9. Try defining user groups before launching the community. For example, you can group users according to employee job function or department. User and Group permissions can be assigned on a space or sub-space basis.

---

**Note:** If your user account and user group information are stored externally (such as in LDAP or Active Directory), new user groups you create will be managed in the Admin Console and stored in the local application database instead.

---

---

**Tip:** You can create user groups for testing, then add user accounts to the groups later.

---

## Setting up permissions for user groups

You set up permissions in the Admin Console to grant various levels of access to individuals or groups of users you define.

To set up permissions:

1. On the permissions page, under **Groups with access**, review permissions to user groups.
2. To assign permissions to a user group not yet added:
  - a. Click **Add group**.
  - b. Enter the name of the user group to add.
  - c. Click the **Select Permissions** button.
  - d. In the dialog box, select the permissions you want to apply for the user group.
3. To edit permissions for a user group already added:
  - a. Locate the group in the list.
  - b. Next to its name, click **edit permissions**.
  - c. In the dialog box, select the permissions you want to apply for the user group.
4. Click **Set Permissions**.

## Creating user overrides

For particular users, you can create exceptions to permissions rules you've set up by creating user overrides. When you create a user override, you might be further limiting a user's access, but you could also be broadening it, for example, to add administrative abilities to the user.

### About user overrides

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

- A user requires a particular set of permissions for a place, but isn't (and shouldn't be) a member of a permissions user group to which you've already assigned permissions for the place.
- A user is a member of a permissions user group to which you've assigned permissions for a place, but the person requires a different set of permissions than those received as a member of the place — if the person is an exception to the rule. For example, you might want to separately define the user permissions to enhance or limit their access in the place.

### Creating user overrides

To create a user override on the permissions page you're editing:

1. Under **User Overrides**, click **Create a user override**.
2. In the box, start typing the name of the user for whom you want to set the override. Click the user's name when you see it show up.

3. Click **Set override** to view the permissions you can assign.
4. In the permissions dialog box, select and clear check boxes to assign the user only the required permissions.

Note that you clear a check box to remove a permission — there's no need to revoke the permission explicitly.

5. Click **Set Permissions** to save the override you've created.

The user has the permissions you configured.

## Managing System Administration permissions

A user with system administration permissions can make configuration changes to the system, as well as manage spaces and user accounts.

System administration permissions give designated users the ability to keep the application running. Assign these permissions to delegate behind-the-scenes work.

---

**Fastpath: Admin Console: Permissions > System Administration Permissions**

---

### Overview of System Administration permission levels

You can use the System Administration permission levels to give users different kinds of control over administrative features in the application. Here are the System Administration permission levels you can assign, and what they enable users to do.

---

**Note:** You can only use the following standard permission levels for System Administration permissions.

---

<b>Full Access</b>	This permission level allows control over every facet of the system. This level should only be assigned to users who are cleared to administer the system from a technical standpoint. It also gives access to view and administer all content in the system. Full Access supersedes all other permissions at the space level and beyond. A user with Full Access can do anything in the application whether or not they're explicitly granted permission to do it.
<b>Manage Community</b>	This permission level allows similar access as Manage System, plus the ability to create and manage spaces, space permissions, and system announcements. Users with this permission level can also view all space content, regardless of permissions, but they cannot view private groups and messages, nor personal container content.
<b>Manage System</b>	This permission level allows control over all technical aspects of the Admin Console. However, it does not automatically grant access to all community content. If your system has content in spaces that should be kept confidential, grant this permission to technical administrators.

<b>Moderate Content</b>	This permission level allows the users to moderate social group content as well as perform global moderation duties across all spaces. This level does not enable Admin Console access. When this level is granted to a user group, all moderated content passes through their queue before it appears in the community. For more information about moderation, see <a href="#">Moderation</a> on page 416 section.
<b>Manage Users</b>	This permission level allows the users to manage the users of the application. For more information, see <a href="#">Managing user accounts and user groups</a> on page 401.
<b>Manage Groups</b>	This permission level allows the users to create and manage user groups, such as for assigning permissions. For more information, see <a href="#">Managing user accounts and user groups</a> on page 401.
<b>Manage News Streams</b>	This permission level allows the users to manage the News page, including creating and managing news streams for users and creating and configuring tiles on the News page. For more information about news streams, see <a href="#">Customizing News page</a> on page 31.

## How administrative permission levels affect access

Administrative permission levels control access to the Admin Console. Here you can find the sections of the Admin Console visible to users with different permission levels.

For example, a user who has been assigned the Manage Users permission level wouldn't typically need access to system-related areas of the Admin Console other than those for managing user accounts.

---

### Note:

- You may not see all Admin Console sections and pages, depending on which optional modules you have installed in your community.
  - Users with only Manage News Streams permissions cannot see the Admin Console.
-





Table 1. Overview Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
Overview	✓	✓	✓	⊘	✓	✓

Table 2. System Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<b>Management (all pages)</b>	✓	✓	✓	⊘	⊘	⊘
<b>Settings (all pages)</b>	✓	✓	✓	⊘	⊘	⊘
Search	✓	✓	✓	⊘	✓	⊘
Spell Check	✓	✓	✓	⊘	✓	⊘
<b>Plugins (all pages)</b>	✓	✓	✓	⊘	⊘	⊘
<b>Moderation</b>						
Moderation Configuration	✓	✓	✓	⊘	✓	⊘
Config Spam Prevention	✓	✓	✓	⊘	⊘	⊘
Spam Link Domain WL	✓	✓	✓	⊘	⊘	⊘

Table 3. Spaces Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<b>Management (all pages)</b>	✓	✓	⊘	⊘	⊘	⊘
<b>Settings (all pages)</b>	✓	✓	⊘	⊘	⊘	⊘

Table 4. Blogs Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<b>Management (all pages)</b>	✓	✓	✓	⊘	⊘	⊘
<b>Settings (all pages)</b>	✓	✓	✓	⊘	⊘	⊘



Table 5. People Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<b>Management</b>						
User Search	✓	✓	✓	⊘	✓	✓
Create User	✓	✓	✓	⊘	✓	⊘
Group Summary	✓	✓	✓	⊘	⊘	✓
Create Group	✓	✓	✓	⊘	⊘	✓
User Relationships	✓	✓	✓	⊘	✓	⊘
Org Chart (internal community)	✓	✓	✓	⊘	✓	⊘
<b>Settings</b>						
Avatar Settings	✓	✓	✓	⊘	⊘	⊘
Ban Settings	✓	✓	✓	⊘	✓	⊘
Delegated Authentication	✓	✓	⊘	⊘	⊘	⊘
Directory Server Settings	✓	✓	✓	⊘	⊘	⊘
Forgot Username	✓	✓	✓	⊘	⊘	⊘
Login Security	✓	✓	✓	⊘	⊘	⊘
Org Chart Settings (internal community)	✓	✓	✓	⊘	⊘	⊘
Password Reset	✓	✓	✓	⊘	⊘	⊘
Profile Image Moderation	✓	✓	✓	⊘	⊘	⊘
Profile Settings	✓	✓	✓	⊘	✓	⊘
Registration Settings	✓	✓	✓	⊘	⊘	⊘
Single Sign On	✓	✓	✓	⊘	⊘	⊘
Status Level Settings	✓	✓	✓	⊘	⊘	⊘
Terms and Conditions	✓	✓	✓	⊘	⊘	⊘
User Relationship Settings (external community)	✓	✓	✓	⊘	⊘	⊘
User Status Update Settings	✓	✓	✓	⊘	⊘	⊘

Table 6. Permissions Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<i>Permissions (all pages)</i>	✓	✓	✓	⊘	⊘	⊘

Table 7. Add-ons Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<i>Add-ons (all pages)</i>	✓	✓	✓	⊘	⊘	⊘

Table 8. Ideas Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<i>Ideas (all pages)</i>	✓	✓	✓	⊘	⊘	⊘

Table 9. Events Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
General	✓	✓	✓	⊘	⊘	⊘

Table 10. Mobile Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<i>Mobile (all pages)</i>	✓	✓	✓	⊘	⊘	⊘

Table 11. Video Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
Preferences	✓	✓	✓	⊘	⊘	⊘

Table 12. Gamification Section

Console Page	Full Access	Manage Community	Manage System	Moderate Content	Manage Users	Manage Groups
<i>Gamification (all pages)</i>	✓	✓	✓	⊘	⊘	⊘

## Setting up administrative permissions for user groups

You can assign groups of users the system administrator permissions.

---

**Fastpath: Admin Console: Permissions > System Administration**

---

To assign System Administration permissions to a user group:

1. In the Admin Console, go to **Permissions > System Administration**.
2. To assign permissions to a user group not yet listed:
  - a) Click **Add group**.
  - b) Enter the name of the user group to add.
  - c) Click the **Select Permissions** button.

- d) In the **System Administration Permissions for <user\_group>** dialog box, select check boxes for the permission levels you want to apply for the user group and clear check boxes for the permissions to be removed.
- e) Click **Set Permissions**.

The selected permissions are granted to the user group.

3. To edit permissions for a user group already listed:

- a) Locate the group in the list.
- b) Next to its permission level, click **edit permissions**.
- c) In the **System Administration Permissions for <user\_group>** dialog box, select check boxes for the permission levels you want to apply for the user group and clear check boxes for the permissions to be removed.
- d) Click **Set Permissions**.

The selected permissions are granted to the user group.

## Managing space permissions

Spaces are places where users can post content such as documents, discussions, and blog posts. You can assign users or user groups a variety of space permissions to control their level of access to the space.

Space permissions have various levels and customization options. For more information, see [Overview of space permission levels](#) on page 383.

At a high level, setting up space permissions typically includes these steps:

1. Create user groups that capture how you want to grant access to the community's features. For more information, see [Overview of user groups](#) on page 373.
2. Set the default space permissions. These should represent the access you most commonly want to provide for new spaces in the community.
3. As you add spaces, decide how to handle setting permissions for each. When someone creates a space, their options typically are:
  - Inherit from the parent space
  - Start with the parent space's permissions, then customize
  - Start with the default space's permissions, then customize
  - Start from scratch (no permissions assigned), then customize

---

**Note:** Projects and sub-spaces inherit the permissions of their parent space. Social groups, however, are independent of spaces. For more information, see [Managing social group permissions](#) on page 395.

---

## Overview of space permission levels

Jive includes several standard space permission levels, such as a Moderator or Administrator, that you can assign to individual users or groups of users that you define. Additionally you can create your own custom space permission levels.

When you assign permissions for access to a space, you can assign a level, and then further customize as needed with overrides for particular users.

### Standard Space Permission Levels

These permission levels are designed for common roles, such as a space Administrator, a Moderator. These permission levels control how users access space features at a high level. For more information, see [Standard space permission levels](#) on page 387.

### Custom Space Permission Levels and User Overrides

Create a custom space permission level to allow fine-grained access to the space. For example, you might create a custom level in which people can create new discussion posts but only comment on documents (rather than create them). For more information, see [Custom permission levels and user overrides for spaces](#) on page 388.

---

**Note:** Projects and sub-spaces inherit the permissions of the space that contain them. Social groups, on the other hand, are independent of spaces. For more, see [Managing social group permissions](#) on page 395.

---

## How spaces inherit permissions

To make managing space permissions easier, an inheritance model provides a way to avoid (when you can) setting specific minute permissions for each new space. Spaces can inherit permissions from their parent or use those permissions as a starting point.

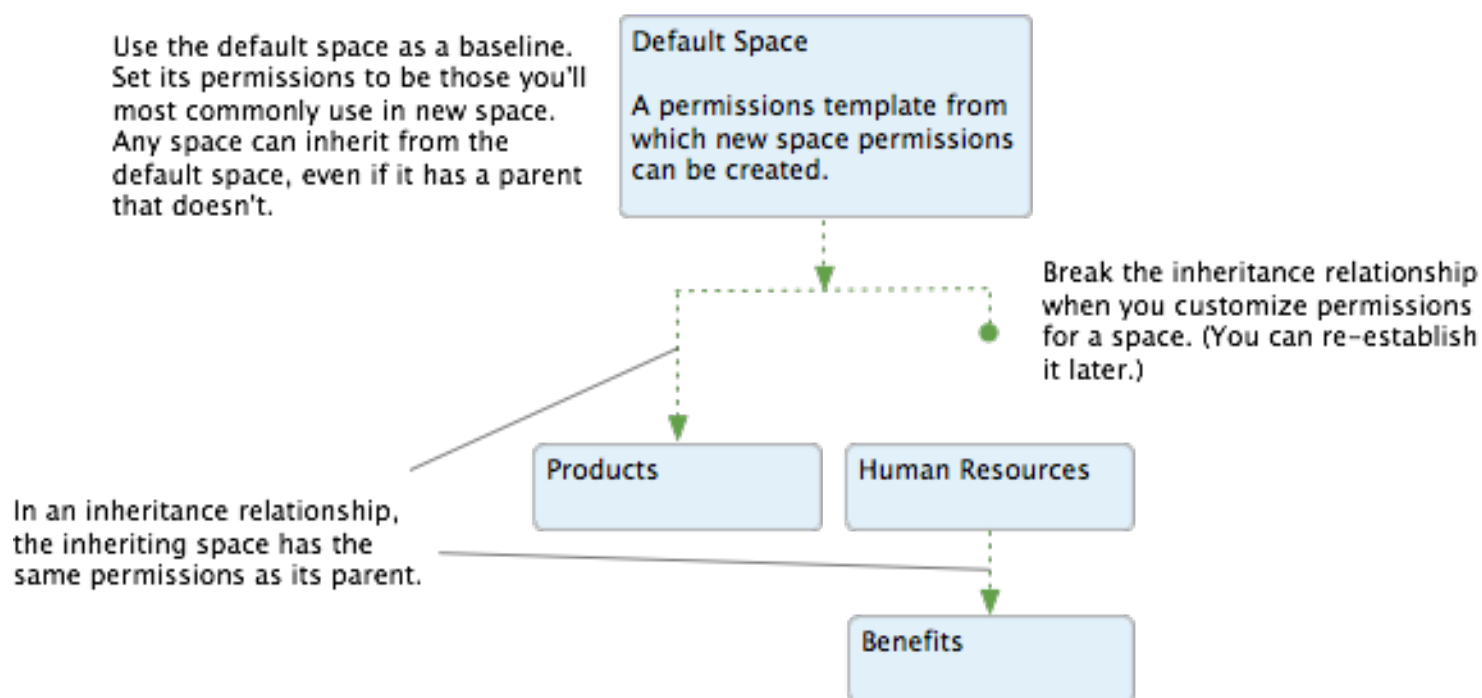
When a space is created, it inherits permissions from the parent space. The inheritance relationship means that changes to the parent space permissions automatically change permissions in inheriting spaces and sub-spaces. A root space typically called *community* is provided as a starting place for new spaces regardless of where they are in the hierarchy. While not actually a space in other respects — it can't contain content — the root space is useful as a permission template.

---

**Note:** The Admin Console provides cues about inheritance for a particular space — for example, by noting how many spaces inherit permissions from it.

---

## Important inheritance characteristics



- You can customize the root space permissions to represent a permission set that is commonly used when creating new spaces. A new space can use these, if only as a starting point.
- A space inherits its parent space permissions, a relationship that must be broken before the sub-space permissions can be customized. For spaces at the top level, the root space is the parent space.
- At any point after a space is created, you can re-establish an inheritance relationship between it and its parent space. When you do, you remove any customizations you've made to permissions in the sub-space and in spaces that inherit from the sub-space.
- A new space can begin with its parent space permissions as a starting point only. When it does, those permissions aren't inherited, thus providing a basis for customization.
- A new space can begin with the default space permissions as a starting point, regardless of where the new space is in the hierarchy.
- A new space can begin with no permissions set, a blank slate that you customize.

## Customizing root space permissions

The community includes a root space, called *community* by default. From there you can add more spaces to create a hierarchy.

---

**Fastpath: Admin Console: Permissions > Space Permissions**

---

The root space is the parent to all other spaces and is designed to be a community-wide template for setting permissions in new spaces. When new spaces are created, their permissions can be based on the root space's, if only as a starting point to customize. You can customize the root space, setting commonly-used permissions that make sense for new spaces to have.

To customize root space permissions:

1. In the Admin Console, go to **Permissions > Space Permissions**.
2. Click **Edit root space permissions**.
3. On the **Default Space Permissions**, configure the root space permissions for user groups and individual users.

The specified permissions are applied to all top-level spaces which inherit the settings and can be used as the default setting when creating a new space.

For more information on setting up permissions, see [Overview of permission assignments](#) on page 373.

## Setting up user group permissions for spaces

For any space, you can assign various permission levels to individual users or groups of users.

---

**Fastpath: Admin Console: Permissions > Space Permissions**

---

You can assign custom permissions levels for any space or sub-space in the community. For more information about space permission levels and overrides, see [Standard space permission levels](#) on page 387 and [Custom permission levels and user overrides for spaces](#) on page 388. For user groups permissions, the user group must exist before you can assign it permissions.

To set up permissions for user groups to a space:

1. In the Admin Console, go to **Permissions > Space Permissions**.
2. Under **View and edit a space's permissions**, find and select the space you want to set permissions for.
3. On the **Permissions For: <space name>** page, review permissions to a group of users or individual users.
4. To assign permissions to a user group not yet listed:
  - a) Click **Add group**.
  - b) Enter the name of the user group to add.
  - c) Click the **Select Permissions** button.

- d) In the **System Administration Permissions for <user\_group>** dialog box, select check boxes for the permission levels you want to apply for the user group and clear check boxes for the permissions to be removed.
- e) Click **Set Permissions**.

The selected permissions are granted to the user group.

5. To edit permissions for a user group already listed:

- a) Locate the group in the list.
- b) Next to its permission level, click **edit permissions**.
- c) In the **System Administration Permissions for <user\_group>** dialog box, select check boxes for the permission levels you want to apply for the user group and clear check boxes for the permissions to be removed.
- d) Click **Set Permissions**.

The selected permissions are granted to the user group.

## Re-establishing permission inheritance between spaces

You can re-establish inheritance of permissions between parent spaces and their child spaces if the inheritance has been broken previously by customizing the child space permissions.

---

### Fastpath: Admin Console: Permissions: Space Permissions

---

Note that by re-establishing inheritance you remove any customizations you've made to permissions in the sub-space and in spaces that inherit from the sub-space.

To re-establish permission inheritance between a parent space and its child space:

- 1. In the Admin Console, go to **Permissions > Space Permissions**.
- 2. Under **View and edit a space's permissions**, find and select the child space.
- 3. On the **Permissions For: <space name>** page, click **Reestablish permission inheritance to <space name>** and click **Apply** to confirm.

The inheritance is re-established and all permission customizations of the child space are removed.



## Creating user overrides for spaces

You can create an override for an individual user of a space.

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

- A user requires a particular set of permissions for a place, but isn't (and shouldn't be) a member of a permissions user group to which you've already assigned permissions for the place.
- A user is a member of a permissions user group to which you've assigned permissions for a place, but the person requires a different set of permissions than those received as a member of the place — if the person is an exception to the rule. For example, you might want to separately define the user permissions to enhance or limit their access in the place.

To create a user override for a space:

1. In the Admin Console, go to **Permissions > Space Permissions**.
2. Under **User Overrides**, click **Create a user override**.
3. In the box, start typing the name of the user for whom you want to set the override. Click the user's name when you see it show up.
4. Click **Set override** to view the permissions you can assign.
5. In the permissions dialog box, select and clear check boxes to assign the user only the required permissions.  
  
Note that you clear a check box to remove a permission — there's no need to revoke the permission explicitly.
6. Click **Set Permissions** to save the override you've created.

The user has the permissions you configured.

## Standard space permission levels

Jive includes several predefined space permission levels that you can assign to user groups or individual users.

You can see the list of space levels on the Space Permissions page in the Admin Console, on the **Standard Levels** tab.

---

**Fastpath:** Admin Console: **Permissions > Space Permissions**

---

Additionally, you can also add your own levels, as described in [Custom permission levels and user overrides for spaces](#) on page 388.

## Standard levels overview

The following table lists the standard space permission levels, along with a summary of the access granted by each. The details on specific permissions are described in [Access granted for each level](#) on page 388.



Space permission level	Access granted
<b>Administer</b>	Design the space layout, read and write all content types, delete (but not edit) comments, assign permissions to users and user groups, delete the space
<b>Moderate</b>	Read and write all content types, edit other user content
<b>Create</b>	Read and write all content types
<b>Contribute</b>	Comment on commentable content types and reply to questions and discussion threads
<b>View</b>	View content
<b>Discuss</b>	Read and write in discussions and questions, contribute on all other content types
<b>No Access</b>	Only applicable when creating a user override. Use this to prevent access to the space and no entitlements are set

### Access granted for each level

The following table lists each default space permission level, along with the specific permissions granted by each.

Space Permission Level	View	Create	Reply	Comment	Attach file	Insert image	Rate	Vote	Create Project	Create Announcement	Edit Comment	Delete Comment	Moderate
Administer	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No
Moderate	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Create	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No
Contribute	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No
View	Yes	No	No	No	No	No	No	No	No	No	No	No	No
Discuss	Yes	Yes	Yes	Yes	No	No	Yes	Yes	No	No	No	No	No

### Custom permission levels and user overrides for spaces

When you create a custom permission level or a user override, you're designing exceptions to existing rules. Those exceptions could replace permission levels included by default, permission levels you've created, or one-off overrides for particular users.

For example, you might want to create a custom permission level for a group of people who should be the only ones to post to a space's blog. Or you might create a user override for a particular user who will be a space's administrator, managing its permissions, and creating spaces beneath it.

---

**Fastpath: Admin Console: Permissions > Space Permissions**

---

When you create this kind of customization, your options are divided into three categories:

- No access** Available for a user override only, this option lets you exclude a particular user from access to the space. This is designed as a user-by-user approach. To prevent access for a group of people instead, ensure that those people aren't included in groups that do have access. For example, to restrict access to a space that contains sensitive information, create a user group that contains people who should have access, taking care to leave out those people who shouldn't have it.
- Access space** Available in custom permission levels and user overrides, this category provides fine-grained control with which you assign permissions specific to each content type. This is useful if you want to create a permission level that grants access to create discussion threads but only view documents.
- Manage space** Available in custom permission levels and user overrides, this category provides a way to create administrative roles for the space. Each space should have an administrator, even if that role is inherited from a parent space. But typically, the roles available in this category go to very few people.

The following sections give details on the options available for each of the categories.

### No Access

The user has no access to the space and is not able to see content from it.

### Access Space

This category is used to grant custom content-specific access in the space. When you select this category while customizing, you have access to a list of the content types, each with a list of the access levels available for it. Choose an access level for each content type.

The following table lists the access levels that each content type permission level includes, along with the specific permissions each allows.

**Table 24: Access Granted for Each Content Type Permission Level**

Content Type Permission	View	Create	Reply	Comment	Rate	Vote
Create	Yes	Yes	Yes	Yes	Yes	Yes
Create (for discussions and questions)	Yes	Yes	Yes	Yes	Yes	Yes
Contribute	Yes	No	Yes	Yes	Yes	Yes

Content Type Permission	View	Create	Reply	Comment	Rate	Vote
View	Yes	No	No	No	No	No
Advanced	See the specifics below					

The **Advanced** access level for each content type provides even finer-grained control of permissions for a content type. After you select **Advanced**, select check boxes for the permissions which you want to be customizable.

The following table lists what's available in the **Advanced** level for each content type.

**Table 25: Access settings available for each content type**

Content Type	View	Create	Rate	Comment/Reply	Additional
External Object	Yes	Yes	Yes	Yes	
Discussion and question	Yes	Yes	Yes	Yes	
Poll	Yes	Yes	Yes	Yes	Vote
Blog Post	Yes	Yes	Yes	Yes	
Document	Yes	Yes	Yes	Yes	
Video	Yes	Yes	Yes	Yes	
Content share	Yes	Yes	No	No	
Idea	Yes	Yes	Yes	Yes	
Event	Yes	Yes	Yes	Yes	Insert Image

The following options are also available for customization.

**Table 26: Additional access settings**

Option	Access Granted
<b>Create Project</b>	Create a project in the space
<b>Create Announcement</b>	Create an announcement in the space

## Manage space

Use this category to assign administrative roles that are specific to the space. The following table briefly describes the available access levels with more details provided below.

**Table 27: Manage space settings**

Option	Access Granted
<b>Full Control</b>	Customize the space overview page, edit space details, delete any space content, create subspaces, manage permissions for that space, delete the space, create a category, and manage the space blog
<b>Moderate</b>	Moderate and edit all content in the space. Selecting this option enables the moderation queue for all content in the space

**Full Control** Someone with full control has access to administrative features for the space, along with any sub-spaces beneath it. A space administrator can create sub-spaces, set content defaults, and set permissions for the space. They can see content that is in a moderator queue but hasn't been approved yet. They can designate other space administrators.

**Moderate** Granting moderator permission gives someone two areas of access:

- A content moderator can approve or reject content before it's published. When moderation is on for the place in which the place was created (such as the space, social group, or globally), the content moderator for that place is able to accept or reject the content in a moderation queue. Setting this up involves not only assigning content moderation permission, but also turning on moderation for those kinds of content you want to be moderated. Note that this ability is not inherited in sub-spaces; the moderator can approve or reject content only in the place where they've been assigned permission.
- A content moderator has access to certain links for handling content after it is published. Through these, they can manage content by editing, moving, and deleting it as the need arises. For example, a content moderator might lock a discussion thread that is no longer useful or move a document to another space. These abilities are inherited by sub-spaces of the space in which the permission is granted.

Note that as a fail-safe to ensure that moderated requests always have a place to go, new requests are routed in the following order:

1. If content would be moderated at the sub-space level but there's no moderator there, it goes to the system moderator's queue.
2. If content would be moderated at the system level but there's no moderator there, it goes to the system administrator's queue.

This applies to new requests only. For example, if a request is in the queue when moderators are removed, the requests remain in the queue until someone approves or rejects them there. Existing requests are not be routed to the next queue up. If there's only one moderator and that user is deleted from the system, then requests currently in the queue will be orphaned even after a new moderator is assigned to that area. If moderation permissions are revoked for someone, then that user will still have access to the requests currently in the queue but won't be able to approve or reject them.

Note that in order to have moderators approve and reject content in a moderation queue, moderation needs to be enabled for specific content types. For more information, see [Moderation](#) on page 416.

## Creating custom space permission levels

You can create a custom space permission level that allows fine-grained control of a space. For example, you might create a custom level in which people can create new discussion posts but only comment on documents (rather than create them).

---

**Fastpath:** Admin Console: Permissions > Space Permission Levels .

---

For more information about custom space permission levels, see [Custom permission levels and user overrides for spaces](#) on page 388.

To create a custom space permission level:

1. In the Admin Console, go to **Permissions > Space Permission Levels** .
2. On the **Custom Levels** tab, click **Create new permission level**.
3. In the **Create a Custom Permission Level** dialog box, enter a name and description for the permission level.

These help other administrators know the purpose of the new level.

4. Under **Access and administration**, select a category for the level, then choose from among the options in the category.
5. Click **Save**.

Now you can assign the custom level to an individual user or a user group, then configure the space's permissions to include that user or user group.

## Managing blog permissions

This section describes the permission settings for blogs and how to configure them.

This topic describes the permission settings for global blogs — that is, blogs that aren't associated with a particular place. Global blogs include system blogs (which tend to represent the community as a whole) and personal blogs (which represent a particular community member).

### Overview of global blog permission levels

Blog permission levels enable people to view, create, and comment on global blogs.

Global blogs are the ones that aren't associated with a particular place. Global blogs include system blogs (which tend to represent the community as a whole) and personal blogs (which represent a particular community member). You can only use the following standard permission levels for global blog permissions. Global blogs are those that are not associated with a specific space, group, or project.

---

**Fastpath:** Admin Console: Permissions > Blog Permissions

---

Permission	Access Granted
View blog	View and read all public blog posts
Create blog	Create and manage a personal blog, and author blog posts in it
Comment	Leave comments on public blog posts

**Note:** You configure settings and membership for global blogs by using the Blogs tab of the Admin Console. For more information, see [Managing blogs](#) on page 93.

## Overview of non-global blog permission levels

Non-global blog permission levels enable people to view, create, and comment on blogs which are associated with specific places.

Managing permissions for non-global blogs varies depending on what kind of place the blog lives in. The following table gives a brief description of each:

Blog location	Permissions management
Space	You manage permissions for blogs in a space when you manage permissions for the space. For more information, see <a href="#">Managing space permissions</a> on page 382.
Social group	Access for blogs in social groups is always completely open. That is, if the social group's creator chose to allow a blog for the group, then anyone who's a member of the group can do all allowed things tasks, such as viewing and posting. For more information, see <a href="#">Managing social group permissions</a> on page 395.
Project	Blogs in projects inherit blog permissions from the place the project is in. In other words, a blog for a project in a space inherits blog permissions from the space. For more information, see <a href="#">Managing space permissions</a> on page 382.

## Setting up global blog permissions for user groups

Global blogs are those that are not associated with a specific place. Here you can find how to set up global blog permissions for user groups.

---

**Fastpath: Admin Console: Permissions > Blog Permissions**

---

For user groups permissions, the user group must exist before you can assign it permissions.

To set up permissions for user groups to a global blog:

1. In the Admin Console, go to **Permissions > Blog Permissions**.
2. On the permissions page, under **Groups with access**, review permissions to user groups.

3. To assign permissions to a user group not yet added:
  - a. Click **Add group**.
  - b. Enter the name of the user group to add.
  - c. Click the **Select Permissions** button.
  - d. In the dialog box, select the permissions you want to apply for the user group.
4. To edit permissions for a user group already added:
  - a. Locate the group in the list.
  - b. Next to its name, click **edit permissions**.
  - c. In the dialog box, select the permissions you want to apply for the user group.
5. Click **Set Permissions**.

### Setting up user overrides for global blogs

Global blogs are those that are not associated with a specific place. Here you can find how to set up overrides to global blogs for individual users.

---

**Fastpath: Admin Console > Permissions > Blog Permissions**

---

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

- A user requires a particular set of permissions for a place, but isn't (and shouldn't be) a member of a permissions user group to which you've already assigned permissions for the place.
- A user is a member of a permissions user group to which you've assigned permissions for a place, but the person requires a different set of permissions than those received as a member of the place — if the person is an exception to the rule. For example, you might want to separately define the user permissions to enhance or limit their access in the place.

To set up overrides for global blogs to individual users:

1. In the Admin Console, go to **Permissions > Blog Permissions**.
2. Under **User Overrides**, click **Create a user override**.
3. In the box, start typing the name of the user for whom you want to set the override. Click the user's name when you see it show up.
4. Click **Set override** to view the permissions you can assign.
5. In the permissions dialog box, select and clear check boxes to assign the user only the required permissions.



Note that you clear a check box to remove a permission — there's no need to revoke the permission explicitly.

6. Click **Set Permissions** to save the override you've created.

The user has the permissions you configured.

## Managing social group permissions

In social groups, users can create content such as documents, discussions, and blog posts, but whether users can view, create, or manage social groups is controlled by permissions.

When you manage the permissions, you are managing what users and user groups can do to social groups and to content within them. For example, you may allow a user to create groups, insert images to content, and create attachments to content.

---

**Note:** Projects that are created inside social groups use the same content types as the social group they belong to. For example, if your group only allows users to create blogs or discussions, a project under that group would only allow you to create blogs or discussions as well.

---

When you manage social group permissions, you decide how users and user groups can interact with social groups. They can do any combination of view and create groups, create attachments to content, and insert images. The group owner controls which content types are available for social groups when they create the group, or later when they manage it.

### Overview of social group permissions

Social group permissions are designed as a way to manage whether people can see or create social groups.

A user with access to create a social group can set the group's level of access and which content types are allowed in the group.

---

**Fastpath:** **Admin Console: Permissions > Social Group Permissions**

---

Permissions for each content type in a social group, however, are not configurable. They're essentially unlimited (such as read, create, comment, or attach file). Projects created inside a social group inherit these permissions.

---

**Note:** You should select **View social group** when granting access to create groups. Without that permission, users are not able to see aspects of the user interface through which they can create groups.

---

The following table lists the permissions for social groups.



Permission	Access granted
<b>View social group</b>	See the group feature and read all visible social groups. This is a general visibility option for groups. It must be selected in order for users to choose <b>Group</b> from the <b>New</b> menu in the user interface
<b>Create group (public)</b>	Create a new a public or members only social group
<b>Create group (private)</b>	Create a new private or secret (also known as private unlisted) social group.
<b>Manage social group</b>	Manage any social groups
<b>Create externally accessible group</b>	Create private and secret (also known as private unlisted) social groups that are accessible to invited external contributors.

## Setting up social group permissions for user groups

Here you can find how to set up social group permissions for user groups.

---

**Fastpath: Admin Console: Permissions > Social Group Permissions**

---

You can set social group permissions in the Admin Console on the Social Group Permissions page. For user groups permissions, the user group must exist before you can assign it permissions.

To set up permissions for user groups to a social group:

1. In the Admin Console, go to **Permissions > Social Group Permissions**.
2. On the permissions page, under **Groups with access**, review permissions to user groups.
3. To assign permissions to a user group not yet added:
  - a. Click **Add group**.
  - b. Enter the name of the user group to add.
  - c. Click the **Select Permissions** button.
  - d. In the dialog box, select the permissions you want to apply for the user group.
4. To edit permissions for a user group already added:
  - a. Locate the group in the list.
  - b. Next to its name, click **edit permissions**.
  - c. In the dialog box, select the permissions you want to apply for the user group.
5. Click **Set Permissions**.

---

## Configuring user overrides to social groups

Here you can find how to configure overrides to social groups for individual users.

---

**Fastpath: Admin Console: Permissions > Social Group Permissions**

---

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

- A user requires a particular set of permissions for a place, but isn't (and shouldn't be) a member of a permissions user group to which you've already assigned permissions for the place.
- A user is a member of a permissions user group to which you've assigned permissions for a place, but the person requires a different set of permissions than those received as a member of the place — if the person is an exception to the rule. For example, you might want to separately define the user permissions to enhance or limit their access in the place.

To set up overrides for social groups to individual users:

1. In the Admin Console, go to **Permissions > Social Group Permissions**.
2. Under **User Overrides**, click **Create a user override**.
3. In the box, start typing the name of the user for whom you want to set the override. Click the user's name when you see it show up.
4. Click **Set override** to view the permissions you can assign.
5. In the permissions dialog box, select and clear check boxes to assign the user only the required permissions.

Note that you clear a check box to remove a permission — there's no need to revoke the permission explicitly.

6. Click **Set Permissions** to save the override you've created.

The user has the permissions you configured.

## Setting up non-member content editing

*Community managers and people who have Create Group (Private) permissions can configure private groups so that group members can share specific documents and discussions with non-group members.*

*This allows non-group members to help review and edit private group content but does not let them see any other content items that live in the group.*

---

**Fastpath: Admin Console: System > Settings > Non-member Content Editing**

---

To enable non-member content editing for private groups in your community:

1. In the Admin Console, go to **System > Settings > Non-member Content Editing**
2. Select **Enable non-member content editing**.
3. Click **Save**.

With the setting enabled, owners of private groups see the option to enable non-member content editing when they are editing the private group. People with Create Group (Private) permissions see the option when creating (or editing) a private group. Note that secret, also known as Private: Unlisted, groups can't have this feature enabled, because it would expose the name of the group to users who were not aware of it.

## Managing Home Page Permissions

The Home Page permissions enable you to manage global permissions for features such as polls and announcements on the community Home page, as well as manage permissions that fine-tune the video and update features. These global permissions are not limited by any container.

### Overview of Home page and Other Content permissions

*Other Content permissions enable global permissions for features that affect the application on a global level. These permissions enable people to create and interact with content that is displayed on the community Home page, or fine-tune what users can do with updates in their personal containers and videos that they upload into the projects, spaces, or groups they belong to.*

---

**Important:** We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see [Understanding pages in places](#) on page 272.

---

The community's Home page includes global permissions for actions like managing announcements, which is typically seen by everyone at one time or another. If you have enabled the Home page in your community, it can be a great place to put things that should be visible to everyone. When setting permissions for the Home page, remember that you might want to offer some kinds of access to people who have an active role in the community as a whole, and some kinds more broadly. For example, a community manager could be given permission to create announcements. Other kinds of access, such as voting in polls, rating videos, might keep the community more active if they're more broadly granted. For more information, see [Overview of Home page and Other Content permissions](#) on page 398.

The video and update features include global permissions for actions like commenting on status updates or videos. These permissions can be enabled or disabled for groups of users. You can customize permissions for groups of users in Other Content Permissions page of the Admin Console.

**Note:** You can only use the following standard permission levels for Home page permissions.

Permission	Access granted
<b>Create announcement</b>	Create announcements that appear on the Home page
<b>Create poll</b>	Create polls at the system level
<b>Vote in polls</b>	Vote in polls created at the system level
<b>Create video</b>	Create and upload videos in their personal containers
<b>Rate videos</b>	Rate the videos that they can access
<b>Comment on videos</b>	Comment on the videos that they can access
<b>Create and Repost updates</b>	Create their own status updates and repost someone else's update
<b>Like updates</b>	Like status updates of other users, which affects their status points
<b>Comment on updates</b>	Comment on other user status updates
<b>View updates</b>	Allows users to view updates that others post
<b>Insert update images</b>	Add images to their update as an attachment
<b>Insert comment images</b>	Add images to comments on updates
<b>DM/Sharing user override</b>	Override the DM/Sharing connection requirement
<b>Create Attachments</b>	Create attachments on content
<b>Insert images</b>	Insert images into content
<b>Customize Site</b>	Customize site appearance (theming)
<b>Manage Slideshow Carousel</b>	Manage the slide show displayed in a carousel widget used on the community's Home page and Overview pages
<b>Save JavaScript</b>	Create static HTML content that references or embeds JavaScript

## Setting Home page and Other Content permissions for user groups

Here you can find how to set up Home page and other global content permissions for user groups.

**Fastpath:** Admin Console: Permissions > Other Content Permissions

To set up permissions for user groups to Home page and other content types:

1. In the Admin Console, go to **Permissions > Other Content Permissions**.
2. On the permissions page, under **Groups with access**, review permissions to user groups.

3. To assign permissions to a user group not yet added:
  - a. Click **Add group**.
  - b. Enter the name of the user group to add.
  - c. Click the **Select Permissions** button.
  - d. In the dialog box, select the permissions you want to apply for the user group.
4. To edit permissions for a user group already added:
  - a. Locate the group in the list.
  - b. Next to its name, click **edit permissions**.
  - c. In the dialog box, select the permissions you want to apply for the user group.
5. Click **Set Permissions**.

### Creating user overrides to Home page and Other Content

Here you can find how to configure overrides to the Home page and other content types for individual users.

---

**Fastpath: Admin Console: Permissions > Other Content Permissions**

---

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

- A user requires a particular set of permissions for a place, but isn't (and shouldn't be) a member of a permissions user group to which you've already assigned permissions for the place.
- A user is a member of a permissions user group to which you've assigned permissions for a place, but the person requires a different set of permissions than those received as a member of the place — if the person is an exception to the rule. For example, you might want to separately define the user permissions to enhance or limit their access in the place.

To set up overrides for the Home page and other content types to individual users:

1. In the Admin Console, go to **Permissions > Other Content Permissions**.
2. Under **User Overrides**, click **Create a user override**.
3. In the box, start typing the name of the user for whom you want to set the override. Click the user's name when you see it show up.
4. Click **Set override** to view the permissions you can assign.
5. In the permissions dialog box, select and clear check boxes to assign the user only the required permissions.

Note that you clear a check box to remove a permission — there's no need to revoke the permission explicitly.

6. Click **Set Permissions** to save the override you've created.

The user has the permissions you configured.

## Customization permissions for Overview pages

The Overview pages of places are customizable. Here you can find who can change what on place Overview pages.

Page	Description	Who can customize
Space-Overview	Is displayed on the Overview tab of space	A space administrator
Project Overview	Is displayed on the Overview tab of a project	The project's creator. Space and group owners can edit projects that belong in the space or group
Group Overview	Is displayed on the Overview tab of a group	All group owners
Community Overview (Home)	Is displayed the landing page of your community (if configured)	Community manager

## Managing user accounts and user groups

System administrators, user administrators, and group administrators can use the Admin Console to add, remove, and edit accounts for users and user groups.

Note that system and space administrators can set up permissions for users and user groups, but user and group administrators can not do this. For more information about setting up permissions, see [Managing permissions](#) on page 371.

## Overview of user accounts and user groups

User accounts represent people who have access to the application. User groups collect user accounts in order to make it easier to manage access to the application features.

### User accounts and user groups

A *user account* represents a person who is using the application. Each user account has associated content, including the person's profile. For all users, you can use the Admin Console to change their user name and password, view and delete the content they've created, and view and edit their profile information. You can also disable users, for example when they're no longer involved, but you want to keep their content. For more information, see [Managing user accounts](#) on page 405.

A *user group* collects user accounts, typically in order to make it easier to grant all of the collected users certain permissions. For example, you might create a group of human resources workers so that you can give them (and only them) permission to view potentially sensitive information about employees in a Benefits space. A user group is made up of members, who typically aren't aware they're in the group, and administrators, who have the Admin Console access through which they can manage user group settings and membership. For more, see [Managing user groups](#) on page 402.

## **External user identity systems**

The work you do with user accounts and user groups depend heavily on whether the application is connected to an external user identity management system. Generally, when you add user accounts and user groups by using the Admin Console, you're adding that data to the same database used to store content. This isn't typically the case if the application is connected to an external user identity system such as LDAP or Active Directory. In that case, much of the information about users is coming from — and managed within — the external system.

By default, even if your community uses an LDAP or Active Directory database (or some custom solution), the users you add through the Admin Console are added to the application's database and not the external system. It is also possible that user accounts are managed by the external system, but the groups they're members of are created and managed locally in the application database. How user groups are managed is defined when the external system is connected to the application.

For more information on connecting an external LDAP or Active Directory system, see [Setting up LDAP and Active Directory](#) on page 54.

## **User registration**

You can configure the application so that users can register on their own. When you enable user-created accounts, people can register by entering basic required registration information (such as a user name and password), along with user profile information. They can also invite other people to join the community.

For information on configuring registration, see the [Configuring self-service user registration](#) on page 138.

## **Managing user groups**

A user group makes assigning and managing permissions easier by gathering users into one group. The existence of user groups isn't visible in the application's user interface unless you use role badges for the group.

An example of a user group is a group called "hr\_users" that includes users who work in the human resources department as members.

User groups are made up of members and administrators. Unless they have access to the Admin Console, members typically aren't aware that they're in a user group. The member's account defines (at least partly) their access to the application features. Group administrators have access to the area of the Admin Console through which they can manage settings and membership for a group they're administering. Unless they have other types of administrator access, they are only able to access account management pages for the account they're administering.



By default, even if your community uses an LDAP or Active Directory database (or some custom solution), the users you add through the Admin Console are added to the application's database and not the external system. It is also possible that user accounts are managed by the external system, but the groups they're members of are created and managed locally in the application database. How user groups are managed is defined when the external system is connected to the application.

For more information on connecting an external LDAP or Active Directory system, see [Setting up LDAP and Active Directory](#) on page 54.

## Creating user groups

You add user groups by creating and naming a group, then adding user accounts for each of the group's members. You should also add one or more user accounts as administrators for the group.

---

**Fastpath: Admin Console: People > Management > Create User Group**

---

You can assign role badges to groups. Role badges provide visual cues in the user interface that help people quickly identify community users and their responsibilities. For more information see [Adding and removing users to user groups](#) on page 404.

To create a user group:

1. In the Admin Console, go to **People > Management > Create User Group**.
2. Under **General Settings**, in **User Group Name**, enter a user group name.  
The name should be meaningful and convey the group purpose, for example, HR\_bloggers or Support\_specialists.
3. In **Description (optional)**, enter the description of the user group.  
You should add the information about this group purpose and who is included in it.
4. If the group can be used as part of the News audience, select the **Visible to News Admins** check box.
5. If you want to use role badges, do the following:
  - a) Under **Role Badge**, select **Enabled**.
  - b) In **Badge Image**, browse and upload a 16 by 16 px image to be used as the role badge.
  - c) Select the role for the users in this user group from the following roles:
    - Administrator
    - Champion
    - Employee
    - Expert
    - Moderator
    - Support
6. Click **Create Group**.



7. Use the **Add Members** links to add user accounts of the members of the new user group. For more information see [Adding and removing users to user groups](#) on page 404.
8. Use the **Add Admins** links to add user accounts for users who have permission to administer the account. If you use the badge roles, they are not applied to the administrators. For more information see [Adding and removing users to user groups](#) on page 404.
9. Try defining user groups before launching the community. For example, you can group users according to employee job function or department. User and Group permissions can be assigned on a space or sub-space basis.

---

**Note:** If your user account and user group information are stored externally (such as in LDAP or Active Directory), new user groups you create will be managed in the Admin Console and stored in the local application database instead.

---

---

**Tip:** You can create user groups for testing, then add user accounts to the groups later.

---

## Adding and removing users to user groups

A user group includes members and administrators. As a user group administrator, you can add members and administrators to the group.

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**Fastpath:** **Admin Console: People > Management > User Group Summary**

---

If you want admins to have the same permissions (if any) granted to a user group, then you need also to add them to the Group Member list. When admins are not added to the Group Members list, they only have permission to add or remove users from the Group Members and Group Admins lists, and they do not have the permissions (if any) assigned to the user group.

To edit the membership list for an existing user group:

1. In the Admin Console, go to **People > Management > User Group Summary**.
2. Click **Edit** next to the group from which you want to add or delete members.
3. Click **Edit** next to Admins or Members depending on which you want to add or edit.
4. Add members to the group by typing their name in the Add Member box, then clicking the Add button. If you don't know the name, click User Picker to browse or search a list of users, then select the check box for the user you want to add. Unless they have access to the Admin Console, users won't know which user groups they're a part of.
5. Add admins in the same way you add members. User group administrators have access to the portions of the Admin Console where they can manage settings and

membership for the group they're administering. You may want to add this Admin to the Group Member list to grant them user group permissions, if any.

6. Click **Update** .

## Editing user group properties

User group settings are simple, including the group's name and description, along with group properties. You can add specific properties to user groups to

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**Fastpath: Admin Console: People > Management > User Group Summary > User Group Settings > User Group Properties**

---

User group properties are simple name-value pairs that programmers can use to work with the group in their code. User group properties are often used as a way to keep track of extra information about the group. For example, if groups are defined based on company departments, each could have a `departmentID` property whose value is the department's internal billing ID. A group can have multiple properties. When you're working with properties, remember that entering the name and value for an existing property updates the value of that property to the one you entered.

To edit the group properties:

1. In the Admin Console, go to **People > Management > User Group Summary** .
2. Click the group whose properties you want to edit.
3. On the **User Group Settings** page, click **User Group Properties**.

This opens the **Edit Group Properties** page where you can add, view, edit, and delete the group properties.

4. Add the property name and value in the **Property Name** and **Property Value** boxes.
5. Click **Save property**.

The added property is displayed in the **Extended Properties** list. If required, you can edit the property or delete it.

## Managing user accounts

You can access just about everything related to a user from their user account in the Admin Console.

---

**Note:** If your community uses an external user identity system (such as LDAP or Active Directory) to manage user data, by default you cannot use the Admin Console to edit information managed there. Console fields corresponding to data in the external system are disabled, and you cannot delete users from the Admin Console. Note that typically, the external system stores profile information about the user, while information about their activity in the application is stored in the application

database. For more information about using LDAP or Active Directory with Jive, see [Setting up LDAP and Active Directory](#) on page 54.

---

## Creating user accounts

One of the ways to add new users to the community is to create their user account in the Admin Console.

---

**Fastpath: Admin Console: People > Management > Create User**

---

By default, if your community uses LDAP or Active Directory to manage users, new user accounts you create from the Admin Console go into the local application database (where content is stored). You can edit user account properties for LDAP-managed users if your LDAP provider allows it (by default, it is prohibited). For more information about using LDAP or Active Directory with Jive, see [Setting up LDAP and Active Directory](#) on page 54.

To create a new user account:

1. In the Admin Console, go to **People > Management > Create User**.
2. In **Username**, enter a username.  
Note that some communities are preconfigured to use a user email address as their username.
3. In **First Name** and **Last Name**, enter the name of the person for whom you creating a user account.

---

**Note:** A username may not contain any of the following characters: , / ? & #

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4. In **Email**, enter the email address of the person.
5. In **User Type**, specify if this person is a regular user or an external contributor.
6. In **Password** and **Confirm Password**, enter the password to the account.

The user will be able to change the password after logging in if the community settings allow that.

7. Select the **Send Welcome Email** check box to send the new user a welcome email.

For more about the template a welcome email is created from, see [Editing email notification templates](#) on page 180.

8. Click **Create User**.

The user account is created, and the **User Summary** page opens for editing with the account properties. Generally, you should edit properties for the user account while you're creating it because a newly created account doesn't have permission to do anything in the community. For more information on the profile settings, see [Overview of user account management](#) on page 407.

## Overview of user account management

As an administrator, you can view and edit user's basic information, reset their passwords, view their community content, or delete their account altogether.

---

**Fastpath: Admin Console: People > Management > User Search**

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To view or edit a user account summary:

1. In the Admin Console, go to **People > Management > User Search** .
2. In the list of users, click on the username of the user whose user account you want to edit.
3. View and edit the account settings.
4. Click **Update** to save the changes.

Here are the settings you can change.

### Profile information

Among the user properties, you can see the information that's part of the user's profile. Much of this is the same information that the rest of the community sees when they view the user's profile.

### Password

You can change the password for a user. Note that you can configure the application to enable users to request their own password reset. If that feature is disabled, then you can reset the password from this account summary. For more information about self-registration, see [Configuring self-service user registration](#) on page 138.

---

**Caution:** If you change a user's password this way, the application does not send an email to the user whose password you changed.

---

### Deactivation or deletion of user account

You can disable a user account, removing their access but keep their content in the system. Alternatively, you can delete the user with all their content. For more information, see [Deleting and deactivating user accounts](#) on page 408.

### User activity in your community

You can view lists of the documents, discussion messages, and blog posts that a user has contributed or worked on. The User Properties lists display quantities for each, and you can view a list of the items themselves by clicking the name of the kind of item you want to view.

### Visibility settings

You can choose whether or not a user name and email address are visible to others in the community.

An administrator can configure the application so that a user can set the visibility of their own name and email address. In that case, then the user is able to change the setting independently of the setting you make in the Admin Console — that is, if you change it, they can change it back.

### Group membership

If the user account is a member of user groups, links to those accounts are displayed among the user properties.

User groups are a way to collect user accounts to more easily manage user access and permissions. For more information about them, see [Managing user groups](#) on page 402.

### Email notifications

The **User Properties** list displays the number of email notifications the person is signed up for. Clicking User Properties shows the details for this.

### Avatars

If a person has uploaded their own avatars, their User Summary page displays the images they've uploaded. You can delete avatar images from this page.

For more on managing avatars, see [Managing Avatars](#) on page 154.

### User properties

User properties are simple name-value pairs that developers can use to work with the user account in their code. User properties are often used as a way to keep track of extra information about the user account. A user can have multiple properties. When you're working with properties, remember that entering the name and value for an existing property will update that property's value to the one you entered.

### Deleting and deactivating user accounts

You can deactivate or delete a user account when you want to remove the person's presence from the community.

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**Fastpath: Admin Console: People > Management > User Search**

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*Deactivating* a user account removes their access but keeps their content in the system. When you deactivate someone's account, Jive replaces their former avatar with a blank avatar; the word "Deactivated" appears on their profile. The person is no longer be able to log in or receive notifications, but their content remains viewable in the application.

Only community managers can search for deactivated users from the Advanced Search when setting **Deactivated Users** to **Show** and from the user search in the Admin Console. Regular users cannot see and use this option when searching.

*Deleting* a person's user account deactivates their access and also deletes the community content they've contributed. This is a permanent action that, depending on the user's amount of activity, can have an impact on content throughout the community. If you're not sure whether you want to delete the account, consider banning or deactivating the user instead.

**Caution:** Deleting someone's account is permanent. This action deletes everything about the user's presence in the system. This includes in some cases content that was created by other people (such as replies to the deleted user's posts). We recommend that you read the warnings on the [Delete User](#) page!

---

Note that tiles created by users in places belong to the places and not to the user. Consequently, when the account of the creator is deleted, all tiles and content added by using tiles are not deleted; they remain available in places.

---

**Note:** An administrator can ban someone from being able to access the community. For more information, see [Configuring banning](#) on page 149.

---

To delete or deactivate a user account:

1. Go to **People > Management > User Search**.
2. Find the user account you want to delete in the list and
3. To deactivate the user account, click **Deactivate**.

The user account is deactivated, and the user is not able to access the community. The content that is associated with the account remains.

4. To delete the user account, click **Delete**.

The user account and all associated data are deleted. This may take some time to finish, depending on how much content is associated with the account.

## Synchronizing with user authentication systems

You can set up the application to synchronize data between its database and your external user identity system, such as LDAP or Active Directory. This feature helps you ensure that the local application database contains only data related to users who are in your external user identity provider.

---

**Fastpath:** **Admin Console: People > Settings > Directory Server Settings > User Synchronization**

---

Typically the application is configured to synchronize a user profile to LDAP each time the user logs in to the community. Additionally, you can also run the synchronization nightly to catch up with any changes during the day. However, you may want to sync users manually when:

- You have added a number of new users in LDAP who have never logged into the community
- You want to mass-disable community users from LDAP.

For more information about synching user accounts, see [Setting up LDAP and Active Directory](#) on page 54.

## Defining user relationships

You can define relationships between people to make following other users easier. The relationships you define are optionally visible in people's profiles. Using these relationships can help community users stay on top of what specific other people in the community are doing, including their changes to content and status messages.

---

**Fastpath: Admin Console: People > Management > User Relationships**

---

You can create new relationships between users, or view or break existing relationships. Although they're simple to use, user relationships require consideration when managing them.

### Creating relationships

To create a friend relationship:

1. In the Admin Console, go to **People > Management > User Relationships**.
2. Under **Create a user relationship**, enter the usernames of the people in the new relationship.

You type the usernames or browse and search a list of users to add users.

3. Click **Add** to create the relationship.

### Viewing and breaking existing relationships

To view or break existing relationships:

1. In the Admin Console, go to **People > Management > User Relationships**.
2. At the bottom of the page, you can see a list of existing relationships.

If necessary, you can filter the list to display only the relationships that include a particular user by entering the username in the **Filter by Username** box and clicking **Filter**.

3. To break a relationship, click **Retire** next to the relationship.

## Configuring Org Chart

The Org Chart shows the organizational relationships between users as a diagram. You can enable or disable the Org Chart in the Admin Console.

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**Fastpath: Admin Console: People > Settings > Org Chart Settings**

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**Fastpath: Admin Console: People > Management > Org Chart**

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By default, the Org Chart is enabled.



## Configuring Org Chart

To enable and configure the Org Chart:

1. In the Admin Console, go to **People > Settings > Org Chart Settings**.
2. Select the **Is Org Chart enabled?** check box.
3. Select the additional options you want for the Org Chart, such as setting up an approval process for changes to Org Chart relationships.
4. Click **Save Changes**.

After you enable and configure the Org Chart for your community, you need to set up the relationships for the Org Chart.

---

**Note:** If your community draws data about people from an external data source such as LDAP or Active Directory server, then organizational relationships might already be defined.

---

## Setting up relationships for Org Chart

To set up user relationships in the structure of your organization:

1. In the Admin Console, go to **People > Management > Org Chart**.
2. To add a relationship, do the following:
  - a. Under **Create a user relationship**, enter the team leader and the team member usernames.  
You type the usernames or browse and search a list of users to add users.
  - b. Click **Add** to add the relationship.
3. Under **View relationships**, you can see the list of existing relationships.  
If necessary, you can filter the list to display only the relationships that include a particular user by entering the username in the **Filter by Username** box and clicking **Filter**.
4. To break a relationship, click **Retire** next to the relationship.

The relationships are displayed on the Org Chart on the user profile page.

## Configuring user profiles

You can configure how users are allowed to set up their user profiles.

### Letting users control their own settings

You can let people control who sees their profile information in the community, or you can set this information for them.

---

**Fastpath:** Admin Console: **People > Settings > Global Profile Settings**

---

For example, you can enable users to change who sees their name and email address, or you can select a group of users who can see their name and email address.



The settings on the **Profile Setting** page enable you to fine-tune certain profile settings, including who can see essential fields by default. You can also set whether to show the user's full name, allow profile images or enable skills and endorsements. For more information on customizing the user profile fields, see [Configuring user profile templates](#) on page 413.

**Table 28: User Profile Fields settings**

Setting	Description
<b>Name Visibility</b>	Select the check box to let users set whether their name should be visible to others in the community. You can also set who sees the name by default with the following exceptions: <ul style="list-style-type: none"> <li>• Users see their full names on their profile page.</li> <li>• The administrators with Manage Groups or higher permissions see the full names on the user profile pages. For more information about permission levels, see <a href="#">Overview of System Administration permission levels</a> on page 377.</li> </ul>
<b>Email Visibility</b>	Select the check box to let users set who can view their e-mail address. You can also set who sees the profile image by default.
<b>Profile Image Visibility</b>	Select the check box to let users set who can view their profile image. You can also set who sees the profile image by default.
<b>Creation Date Visibility</b>	Select the check box to let users set who can view their profile creation date. Users may see a Member Since date. You can also set who sees the creation date by default.
<b>Last Login Date Visibility</b>	Select the check box to let users set who can view their last login date. You can also set who sees the last login date by default.

**Table 29: Other Options settings**

Setting	Description
<b>Allow Profile Images</b>	Select <b>Yes</b> to allow people to display an image (such as a photo of themselves) on their user profile. You can also set the maximum number of profile images users can upload.
<b>Show Full Name by Default</b>	Select <b>Yes</b> to have a person full name displayed on their profile, as opposed to merely their user name. In external-facing communities, people usually prefer not to have their full name displayed. In the <b>Name Visibility</b> field, you can allow users to customize the visibility of their name.

Setting	Description
<b>Show Full Name in User Mentions</b>	Select <b>Yes</b> to have a person's full name displayed when they are at-mentioned. In external-facing communities, people usually prefer not to have their full name displayed. In the <b>Name Visibility</b> field, you can allow users to customize the visibility of their name.
<b>Skills and Endorsements</b>	Select whether you want to enable both skills and endorsements, enable only skills, or disable both. Skills are how users tag their own profile and endorsements are the tags others give users.

## Configuring user profile templates

A user's profile can include biographical and professional information, along with links to content they've contributed. You can use configure the fields that show up in profiles and set up visibility options.

---

**Fastpath:** **Admin Console: People > Settings > Profile Settings**

---

User profiles, like other content, can be found on searches. Because of this, what people say about themselves — including interests and areas of expertise — can be a great source of information for people looking to have a question answered.

On the Profile Settings page, you can see the **Other Profile Fields** sections, where you can define the exact profile template you want to provide users so they can complete their profile. You can see the **Header Profile Fields** highlighted in the top left of user profile if they are marked visible.

The rest of the sections (**User Profile Fields** and **Other Options**) give you a way to let others control their own settings. For more information about them, see [Letting users control their own settings](#) on page 411.

The application includes several commonly used fields by default, and you can add custom fields, as described in [Creating new user profile fields](#) on page 414. Order the fields in the same order you want users to see them. Note that if you allow people to register themselves, you can define a form with a subset of these customized fields for a person to complete when they register.






You can change the behavior of profile fields by clicking the attribute icons under **Manage Properties**. These icons define the field's behavior in the system, such as who can see it or whether it's editable. We recommend that you consider the field visibility. For example, in external-facing communities, people might not want their phone number widely visible.

---

**Note:** Only visible fields are available when searching or browsing.

---

The attributes should reflect how people use profiles. For example, making too many fields required could have the effect of discouraging people from completing them. The following list describes the attributes you can assign the profile field.

-  **Required:** People are not able to save a profile when they leave a required field empty.
-  **Filterable:** When a field is filterable, people can type or select values of the field to make a list of people shorter. For example, someone viewing a long list of people in the community could make the list shorter by filtering on the hire date, specifying that the date to be no earlier than last year.
-  **Searchable:** A searchable field is available to the search engine.
-  **Editable:** People can edit their editable profile fields.
-  **Externally Managed:** Enables users to set this field to their own visibility preferences.

### Creating new user profile fields

You can create custom fields for user profiles. This can be useful if you want to show a unique aspect of your users, such as Astrological Sign or Pet's Name.

---

**Fastpath: Admin Console: People > Settings > Global Profile Settings**

---

To create a custom profile field for user profiles:

1. In the Admin Console, go to **People > Settings > Global Profile Settings**.
2. Click **Create New Field**.

This opens the **New Profile Wizard** page.

3. Choose the field type. You can choose from one of the available types to help provide the best user experience for this field's information.

4. Click **Continue**.

5. Under **Name and Type**, in **Field Name**, enter the field name.

This is a label that identifies the field content, and it may be different than what the user sees in their profile.

6. Under **Translations**, enter the display name for the default language, and click **Add Translation** for each language you want to provide translations for.

This is what the user sees in their profile field.

7. Under **Visibility**, select the **Users may edit the visibility for this profile field** check box to let users edit their own profile field's visibility or clear the check box to set visibility to the default value for all users.

---

**Note:** Only visible fields are available when searching or browsing.

---

8. Under **Visibility**, select the default visibility for the field from the available list.
9. Under **Attributes**, specify the following attributes for the field:
  - **Required:** People are not able to save a profile when they leave a required field empty.
  - **Filterable:** When a field is filterable, people can type or select values of the field to make a list of people shorter. For example, someone viewing a long list of people in the community could make the list shorter by filtering on the hire date, specifying that the date to be no earlier than last year.
  - **Searchable:** A searchable field is available to the search engine.
  - **Editable:** People can edit their editable profile fields.
  - **Externally Managed:** Enables users to set this field to their own visibility preferences.
10. Click **Finish** to create the field.

The new field is added to the **Other Profile Fields** section on the **Profile Settings** page.

### Selecting fields for hover cards

You can decide which of the short fields from people's profiles are displayed on the cards that are shown when you hover over a person's name or avatar in the community.

---

**Fastpath:** **Admin Console: People > Settings > Hover Card Settings**

---

Your hover card fields are a subset of the profile fields you have defined on the Global Profile Settings page, and the visibility of each field is determined by what you've defined in profile settings. You can select up to five fields to be displayed on the hover card.

The following field types can't be displayed on the hover card:

- Fields with the Large Text format (like Bio)
- Fields that are based on a multi-select option

You can change the order of the fields on the card from top to bottom by dragging and dropping. If your community is integrated with Lync or Webex, you can also see the associated links in a fixed location on the card. You also won't be able to move some other information, such as status levels and points.

Note that if a field you selected for the hover card does not contain any information, neither the field nor its label is displayed.

To set up the hover card fields:

1. In the Admin Console, go to **People > Settings > Global Profile Settings** and make sure the hover card fields you want to add have the correct visibility.
2. Go to **People > Settings > Hover Card Settings**.
3. Drag fields you want included on the hover card view from **Available Fields** to **Hover Card Fields**.

You can add up to five fields to the hover card.

4. Drag any of the fields you don't want included off the **Hover Card Fields** list.
5. Toggle **Show Label** to hide or show the field names on the hover card as well as the field values.

For example, if you want the card to show Department: Manufacturing, keep the **Show Label** column selected. If you want to just show Manufacturing, clear the check mark.

For more information about setting up user profiles, see [Configuring user profile templates](#) on page 413 and [Letting users control their own settings](#) on page 411.

## Moderation

Moderation allows you to designate one or more users to approve or reject documents, discussions, comments, and other types of content before they are published in the community. You can set up moderation on nearly all types of content.

As a moderator, you can moderate from the desktop or mobile responsive web version of Jive.

---

### Note:

- Moderation is different from Document Approval. Document Approvers can only approve or reject documents in a space; moderators can approve or reject nearly all content types. For more information about the document approval feature, see [Setting up document approver in space](#) on page 357.
  - If you're trying to set up abuse reporting, see [Setting up abuse reporting](#) on page 358.
- 

## Moderation overview

The moderation feature allows you to assign certain users to review and approve or reject content changes submitted by community users before they are published.

You can designate one or several moderators and enable moderation for a variety of content types. You can also set up abuse reporting and moderate user registration.

The following types of moderation are available in the application.

<b>Content moderation</b>	You can enable content moderation in a space and the projects it contains, and in the root space and all social groups (because
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social groups are contained by the root space and inherit its moderation settings). You can designate one or several content moderators per place, as well as limit the type of content moderated in that place (such as documents, blog posts, and discussions). For more information, see [Setting up content moderation](#) on page 425.

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**Note:** Older versions of content items are not accessible when the latest version is pending moderation.

---

<b>Document approval</b>	Document approval is different from content moderation in that document approvers can only approve documents in a given space. For information about approvals, see <a href="#">Setting up document approver in space</a> on page 357.
<b>User registration moderation</b>	When you enable user registration moderation, registration requests are reviewed by a moderators and then approved or rejected. You can blacklist email addresses from specific domains or auto-approve users if their email addresses originate from your community domain. For more information, see <a href="#">Setting up user registration moderation</a> on page 428
<b>Profile image moderation</b>	You can enable moderation for images that users upload to their user profile. This feature is either fully enabled for all users or fully disabled for all users. For information, see <a href="#">Setting up profile image moderation</a> on page 429.
<b>Avatar moderation</b>	You can enable moderation for every user-uploaded avatar image. For more information, see <a href="#">Setting up user-uploaded avatar moderation</a> on page 429.
<b>Abuse reporting</b>	When users report abuse, the reports are sent to a moderator. For more information, see <a href="#">Setting up abuse reporting</a> on page 358.

For a complete list of content types that can be moderated and the places where you can enable moderation, see [Moderation rules and notification hierarchy](#) on page 419.

## Moderation best practices

If you enable moderation in your community, you should consider using these practices.

### Develop a community usage policy

You should make the usage policy for content and discussions available and easy to find.

Here are some ideas for usage policy statements:

- Don't use profanity.
- Treat others with respect.
- Stay on topic.

## Encourage users to report abuse

You can design policies to ward off abusive or inappropriate posts. Early warning can make a big difference by preventing users from having a negative experience. Make the consequences for unacceptable behavior clear. Other community users are more likely to follow the guidelines when you enforce them quickly and publicly, for example, by removing or editing an offensive post. For more information about abuse reporting, see [Setting up abuse reporting](#) on page 358.

## Designate more than one moderator per place

Relying on only one moderator can cause a bottleneck if that person becomes unavailable. Consider designating more than one moderator per place and more than one global moderator. Here's why:

- The moderation queue for a given place is visible only to its moderators. It is not visible to moderators of other places.
- Content set for moderation remains unpublished and invisible to the community until the moderator approves it.
- Existing moderation requests cannot be routed to another moderation queue (for example, from a sub-space to the root space) after they appear in the moderator queue. They remain in the queue until they're moderated (that is, approved or rejected).
- Users added as new moderators in a place won't see existing moderation requests in that place's moderation queue, only moderation requests that are posted after they became a moderator.

## Content that cannot be moderated

You cannot moderate content created in private groups, secret (also known as private unlisted) groups, or content that has visibility limited to the author (Hidden) or specific users.

### No moderation



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**Note:** Externally-facing communities (those serving customers, partners, and vendors), do not have the Personal Content (Hidden) feature.

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## Moderator roles

A community can have moderators for content on different levels. Here you can find moderator roles and the location in the Admin Console where you assign individual users or user groups to the role.

Permission level	Location of setting
Space Moderator	<b>Permissions &gt; Space Permissions &gt; Moderate</b>
Global Moderator	<b>Permissions &gt; System Administration &gt; Moderate Content</b>
Full Access	<b>Permissions &gt; System Administration &gt; Full Access</b>

## Moderation rules and notification hierarchy

*When moderation is enabled in a place, the application sends a moderation notification to the first valid moderator it finds. Here you can find the content types that can be configured for moderation, who moderates them, and the order in which Jive notifies the moderators about content submitted for moderation.*

For example, if you set up a moderator for announcements in an open Space, Jive first looks for a space moderator; if there is none assigned, it then looks for a Global Moderator, and so on. For more information, see [Moderator roles](#) on page 419.

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**Caution:** We strongly recommend designating more than one moderator per place and more than one global moderator. For more information, see [Moderation overview](#) on page 416.

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The following tables show the types of content that can be configured for moderation, who moderates them, and the order in which Jive notifies the moderators about content submitted for moderation.



**Table 30: Chart of moderation rules for contained content types**

	<b>An- nounce- ments</b>	<b>Polls</b>	<b>Docu- ments</b>	<b>Discus- sions</b>	<b>Blog posts</b>	<b>Videos</b>	<b>Ideas</b>	<b>Status updates</b>
Root contain- er	1. Global moderator 2. Full access							
Open and member social groups	1. Global moderator 2. Full access							
Private and se- cret so- cial groups	Cannot be moderated							
Spaces and sub-spaces	1. Space moderator 2. Global moderator 3. Full access							Content type not avail- able
Projects	1. Space moderator 2. Global moderator 3. Full access							1. Glob- al mod- erator 2. Full access
Your person- al con- tent	Content type not avail- able	Cannot be moderated un- less Visibility = all, then 1. Global moderator 2. Full access			1. Glob- al mod- erator 2. Full access	Cannot be moder- ated unless Visi- bility = all, then 1. Global modera- tor 2. Full ac- cess		Content type not avail- able

**Table 31: Chart of moderation rules for comments on content**

	<b>Poll com- ments</b>	<b>Docu- ment com- ments</b>	<b>Discus- sion replies</b>	<b>Blog com- ments</b>	<b>Video com- ments</b>	<b>Idea com- ments</b>	<b>Status com- ments</b>
Root container	1. Global moderator 2. Full access						
Open and member social groups	1. Global moderator 2. Full access						
Private and secret social groups	Cannot be moderated						
Spaces and subspaces	1. Space moderator 2. Global moderator 3. Full access						Content type not available
Projects	1. Space moderator 2. Global moderator 3. Full access						1. Global moderator 2. Full access
Your personal content	Cannot be moderated unless Visibility = all, then 1. Global moderator 2. Full access			1. Global moderator 2. Full access	Cannot be moderated unless Visibility = all, then 1. Global moderator 2. Full access		Content type not available

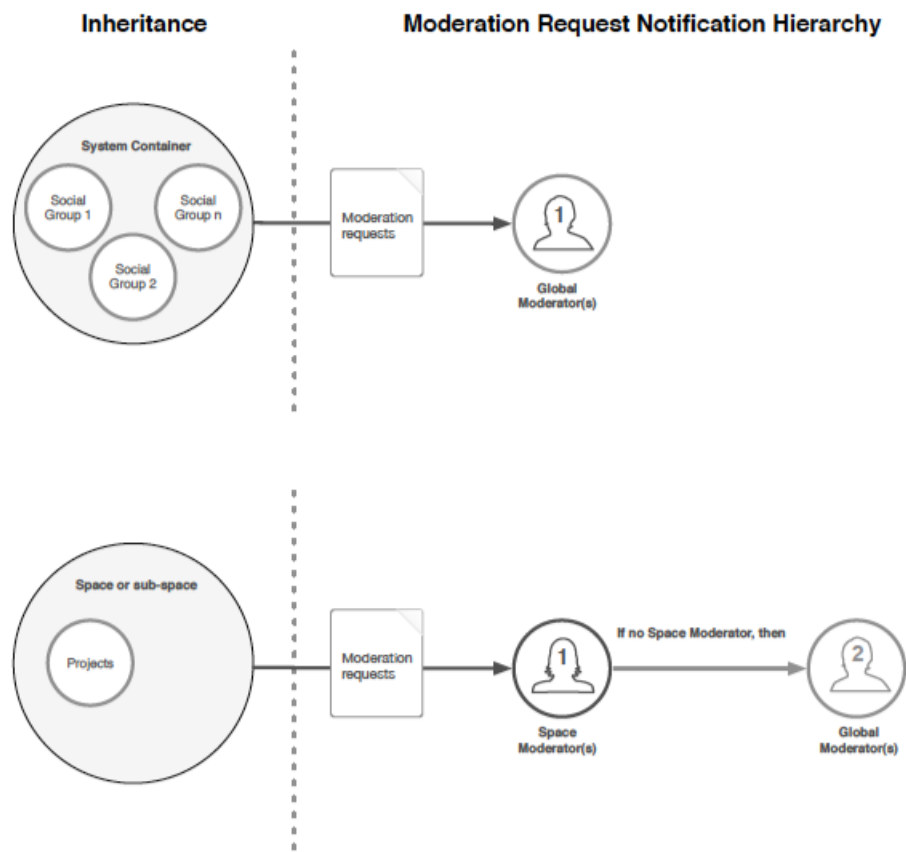
**Table 32: Chart of moderation rules for system-wide content types**

	<b>Avatar image</b>	<b>User registration</b>	<b>Profile images</b>
Root container	1. Global moderator 2. Full access		
Open and member social groups	Content type not available		
Private and secret social groups	Content type not available		

	Avatar image	User registration	Profile images
Spaces and sub-spaces	Content type not available		
Projects	Content type not available		
Your personal content	Content type not available		

## Moderation inheritance in groups and spaces

Moderation inheritance works differently depending on the container of the content.



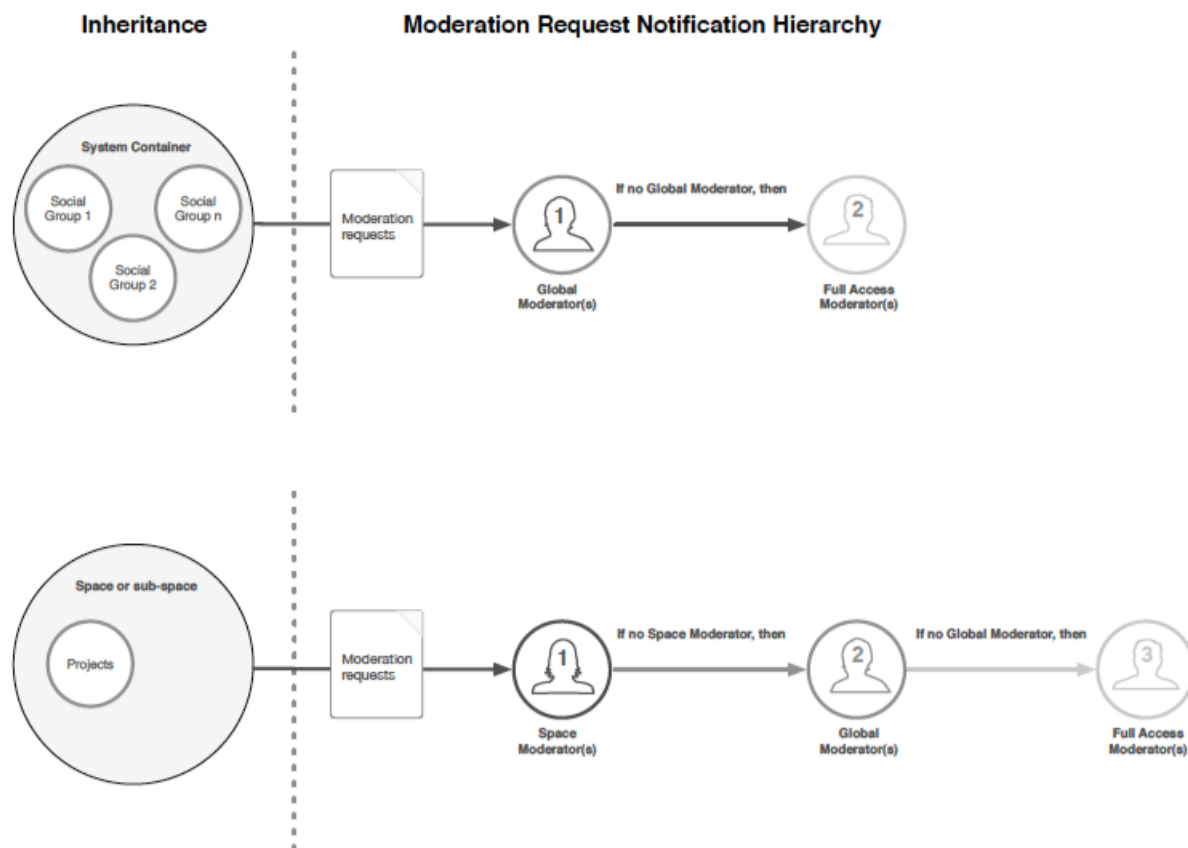
Here's how moderation inheritance works in places:

- Groups inherit the moderation settings of the root container (also known as the system container or a Jive community) and are moderated by global moderators, if there is one, and if not, by the Full Access users.
- Projects inherit the moderation settings of their container space or sub-space and are moderated by space moderators, if there is one, and if not, by the global moderators. If there are no global moderators, the application will send the moderation request to the Full Access users.

**Note:** Projects inherit the moderation settings of their parent space or sub-space. The exception is status updates posted in projects, which are moderated the same way as status updates posted in a group.

For a complete list of content types and the places where you can and cannot enable moderation, see [Moderation rules and notification hierarchy](#) on page 419 and [Moderation overview](#) on page 416.

The following illustration shows how moderation inheritance works and the order in which moderators are notified:



## Document approval

You can designate an approver for any document before you publish it, or a community administrator may designate an approver for a space, so that all documents must be approved before they are published.

---

**Note:** A space approver approves only documents. If you want to set approval on more than documents, use the Moderation feature if your community supports it. For more information, see [Moderation](#) on page 416.

---

### Assigning document approvers for spaces

Community administrators can designate a document approver for a space so that all documents created in the space must be approved before they are published. For more information on setting up space approvers, see [Setting up document approver in space](#) in the Community Manager Guide.

### Adding document approver to single document

You can designate an approver for a document when you are creating it or after you have saved it, but not published it. To add an approver to a single document:

1. While you're editing the document, click **Advanced Options**.
2. Under **Require approval before publication**, enter the name of the person you want to approve the document.

You can also click **Select People** to browse for the person's name.

---

**Note:** If the place that contains your document has moderation enabled (if your community supports it), then the approvers must approve the content before it is sent to the moderator's queue.

---

---

**Note:** Older versions of documents are not accessible when the latest version is pending moderation.

---

### What happens when I submit a document for approval?

1. While awaiting approval, you can see the document in your Drafts by going to **Content > Drafts**.
2. When someone has been assigned a space approver role, documents created in the space are submitted for approval before they are published in the community. If moderation is also enabled for documents in the containing space, then new documents must be approved before they're sent to the moderation queue.
3. If the approver rejects the document, they're prompted to include a message to go with their rejection. That message is added to the document's Author Discussion area, where comments go under the document's content. A rejected document

must be resubmitted (by anyone who can edit the document) for approval before it can be published.

4. If there are multiple approvers, all of them must approve a document before it can be published. After the last person approves the document, it is automatically published (or submitted for moderation if moderation is enabled in the containing space).

## Setting up content moderation

Content moderation in a place is enabled in three steps: selecting the place to be moderated, selecting the content types to be moderated in the place, and assigning the moderators for the place.

---

### Caution:

- You cannot moderate content created in private groups, secret (also known as private unlisted) groups, or content that has visibility limited to the author (Hidden) or specific users.
- Make sure you understand how moderation inheritance works before you enable moderation in a place. For more information, see [Moderation inheritance in groups and spaces](#).

---

## Setting up global content moderation

When you enable moderation in the root container, you are enabling moderation there and in all social groups (because they are contained by the system space and inherit its moderation settings).

---

**Fastpath: Admin Console: Spaces > Settings > Moderation Settings**

---

Moderation requests submitted in the system container or any group are sent to global moderators, if there is one, and if not, to the Full Access users. For more information, see [Moderator roles](#). For more information on setting up permissions, see [Overview of permission assignments](#).

To set up moderation in the root container and all groups:

1. In the Admin Console, go to **Spaces > Settings > Moderation Settings**.
2. Click **Change space** and select the top-level root container space.

By default, the root space is named *community*.

3. Select the check boxes for the content types you want to moderate and clear the check box for content that does not require moderation.

The moderators will review the selected content types.

4. Click **Save changes**.
5. Go to **Permissions > Space Permissions**, and select the root space.

6. Click **Create a user override**, select the users you want to be moderators, and then click **Set exception**.
7. In the **Set Exception** dialog box, select **User can manage space**, and then select **Moderate**.

You can also set a whole group as the moderators by clicking **Add group**, selecting the group, setting the permission level to **Moderate**, and then **Add Group**.

With moderation configured, the selected users or all users of the selected user group are able to view and moderate the specified content types for social groups.

### Setting up space content moderation

When you enable moderation in a space or sub-space, you are enabling moderation in only that space or sub-space and its projects (because projects inherit the moderation settings of their container space or sub-space).

---

**Fastpath: Admin Console: Spaces > Settings > Moderation Settings**

---

Moderation requests submitted in the space first are sent to space moderators, if there is one, and if not, to global moderators. If there is no Global Moderator assigned, the moderation request will go to the [Full Access](#) users. For more information, see [Moderator roles](#).

To set up moderation in a space or sub-space (and its projects):

1. In the Admin Console, go to **Spaces > Settings > Moderation Settings**.
2. Click **Change space** and select the space you want to moderate.
3. Select the check boxes for the content types you want to moderate and clear the check box for content that does not require moderation.

The moderators will review the selected content types.

4. Click **Save changes**.
5. Go to **Permissions > Space Permissions**, and select the space for which you enabled moderation.
6. Click **Create a user override**, select the users you want to be moderators, and then click **Set exception**.
7. In the **Set Exception** dialog box, select **User can manage space**, and then select **Moderate**.

You can also set a whole group as the moderators by clicking **Add group**, selecting the group, setting the permission level to **Moderate**, and then **Add Group**.

With moderation configured, the selected users or all users of the selected user group are able to view and moderate the specified content types for the specified space.

### Reviewing Content Moderation Requests

If you are a moderator for a place, you'll have access to a list of requests for moderation.

In places where content moderation is enabled, the author of a piece of content will see a note explaining that their content needs to be approved by the moderator before it will be published:



After the author submits the post, a moderation request will be sent to the moderator's Moderation queue for approval or rejection. (The community administrator sets up moderators for places. There can be more than one moderator in a place. For more about that, see [Setting Up Content Moderation](#)). Note that the author can still access the submitted content by going to **Content > Drafts**, where they can continue to make changes. The moderator will see only one item to moderate, no matter how many changes the author makes.



If there is more than one item awaiting moderation, you'll see a list in your Moderation queue. For example, you might see content that's been reported as abusive, as well as content that's been submitted for moderation, depending on the moderation features set up by your community administrator. The following example shows a variety of items awaiting moderation:



Notice that at the top of the page, you can filter the content listed. Filtering can be helpful when you've got a very long list.

To moderate, simply click on an item and make a decision to:

- **Approve the content.** This will publish the content in the community. You will no longer see the item in your moderation queue.
- **Edit the content.** You'll be taken to the content editor to make changes.
- **Reject the content.** This will make the content invisible to users. If you (or another moderator) reject the content, its author will be notified via email. You can edit the template content of this email -- see [Managing Email Templates](#) for more information. When you reject a discussion reply, the individual reply is hidden, but its parent and children remain visible. Once something has been rejected by you or another moderator, you can still see the item in the Admin Console under **Spaces > Management > Document/Discussion Management**. From there, you can edit the item by clicking the pencil icon next to it and then publish the item if you've changed your mind about it. Remember that all social groups are contained by the system (root) space, so you will see content items here from groups.
- **Leave a note.** This note is for other moderators; it is not displayed to regular users. For example, you might explain to another moderator why you think the



content should be approved or rejected. Moderator notes are not preserved after the content has left the moderation queue (because, for example, the content was approved).

## Setting up user registration moderation

You can set up moderation for new user registrations if you've set up the application to allow people to register on their own. A community manager or system administrator enables both user registration and moderation for new registration requests.

---

**Fastpath: Admin Console: People > Settings > Registration Settings**

---

To set up new user registration moderation:

1. In the Admin Console, go to **People > Settings > Registration Settings** .

2. Select **Allow users to create their own account** to allow users to create their own account from the login page.

For more information, see [Configuring self-service user registration](#) on page 138.

3. Under **Registration Security > Registration Moderation** , select **Enabled** to turn on the moderation feature for all new user registrations.

4. To limit registration moderation to the email address from the blacklisted domains, select **Only for addresses matching the blacklisted domain list**.

The **Blacklisted Domains** section contains the list of untrustworthy domains. To block or moderate all addresses from a domain, use an asterisk before the domain, for example, `*@domain.com`.

5. To entirely block registrations from the blacklisted domains, select **Always block registrations from blacklisted domains** under **Blacklisted Domains**.

- 6.

With the moderation enabled, you should make sure that you have designated global moderators. The application sends new user registration moderation requests to that users first. If you don't have one, the application sends the request to the Full Access users. For more information about moderator roles, see [Moderator roles](#) on page 419.

## Moderating new user registrations

If you are the moderator for new user registration, you approve or decline new registration requests. When someone submits a new registration, you see a moderation alert in the user interface when you click the button next to your avatar.

To approve or decline a user registration:

1. Go to  > **Moderation** .

You can see the moderation request or requests.

2. On the **Moderation Pending Items** page, click the **person's name > View in Context** to view their profile page with the information they entered.
3. Next to the request, select **Approve** or **Reject**. If you reject, you can enter your reason before finishing.
4. Click **Save All Changes** to apply the decision.

## Setting up profile image moderation

You can enable moderation for images that users upload for use in their user profile.

---

**Fastpath: Admin Console: People > Settings > Profile Image Moderation**

---

This feature is either fully enabled for all users or fully disabled for all users.

Before you set up moderation, the upload of profile images must be enabled in the community. For more information, see [Configuring user profiles](#) on page 411.

To set up moderation of profile images:

1. In the Admin Console, go to **People > Settings > Profile Image Moderation**.
2. Select **Enable moderation of new user profile images**.
3. Click **Save**.

The application sends profile image moderation requests to the users with Global Moderators permissions assigned. If it does not find a Global Moderator, the request goes to the Full Access user who is assigned at **Permissions > System Administration > Full Access**. For more information, see [Setting up content moderation](#) on page 425.

## Setting up user-uploaded avatar moderation

You can have every user-uploaded avatar image added to a moderation queue for approval or rejection.

---

**Fastpath: Admin Console: People > Settings > Avatar Settings**

---

With this setting enabled, a user uploading an avatar is notified that their avatar choice is pending approval. Once approved, the avatar becomes available for the user to designate it (or others) as their primary avatar. It does not become the user's primary avatar until the user manually selects it after moderator approval.

After a user uploads an avatar, the avatar moderation queue becomes available to the moderator through a link on the Avatar Settings page in the Admin Console.

---

**Note:** The avatar moderator will see the link only when there are images in the queue waiting to be moderated.

---

To enable user-uploaded avatar moderation:

1. In the Admin Console, go to **People > Settings > Avatar Settings** .
2. Under **User Uploaded Avatars**, select the **Moderate uploaded user avatars** check box.
3. Click **Save Settings**.

With the moderation enabled, all user uploaded avatars must pass review before becoming available to users. For more information, see [Setting up user-uploaded avatar moderation](#).

## Reviewing user-uploaded avatars

When you choose to have avatars moderated, a user uploading an avatar is notified by the interface that their avatar choice is pending approval. Once approved, the avatar becomes available for the user to designate it as their primary avatar.

---

**Fastpath:** Admin Console: **People > Settings > Avatar Settings**

---

After a user uploads an avatar, the avatar moderation queue becomes available to moderators in the Admin Console.

To review user-uploaded avatars:

1. In the Admin Console, go to **People > Settings > Avatar Settings** .
2. Click **Moderation queue** to see the avatars which must be reviewed.



---

**Note:** The avatar moderator sees the link only when there are images in the queue waiting to be moderated.

---

3. Review every avatar in the list as follows:
  - Select **Approve** to make the avatar available for the user.
  - Select **Reject** to reject the avatar.



4. When you finished reviewing avatars, click **Save All Changes** to apply the changes.

The approved avatars appear on the user avatar list. It does not become the user's primary avatar until the user manually selects it.

Note that user-uploaded avatars don't appear with the default avatar images on the Avatar Settings page. You can view and, if necessary, delete a user's uploaded avatars as follows:

1. In the Admin Console, go to **People > Management > User Search**.
2. Click the user name in the list to view their summary page.
3. Under **User Avatars**, view and delete their uploaded avatar images.

## Moderation: Frequently asked questions

Here you can find the answers to some frequently asked questions about moderation.

### How is moderation in groups different from moderation in spaces?

You can enable moderation on some spaces and sub-spaces, but not others. For each space or sub-space with moderation enabled, you can designate a different user to be the Space Moderator. Projects inherit the moderation settings of their container/parent space or sub-space.

Groups are contained by the system container (also called the root container) and inherit its moderation settings. Therefore, if you enable moderation in the root container, moderation is enabled for the root container and all groups. You cannot enable moderation on an individual group. All moderation requests in the root container and groups are sent to the Global Moderators, if there is one, and if not, to the Full Access user.

### Can I moderate the creation of groups?

There is no specific setting to set up moderation for the creation of groups. However, you can implement a workaround by limiting the permissions of group creation to one group of users. Regular users would then have to request the creation of a new group from the group with permission.

### How does moderation inheritance work?

We explain this with handy drawings in [Moderation inheritance in groups and spaces](#) on page 422.

### What kinds of content can be moderated?

Nearly all content types can be moderated. For a full list, see [Moderation rules and notification hierarchy](#) on page 419

You cannot moderate content created in private groups, secret (also known as private unlisted) groups, or content that has visibility limited to the author (Hidden) or specific users.

### How do I moderate all items containing a specific word?

We recommend setting up a keyword interceptor. For information, see [Managing interceptors](#) on page 121.

### **If a space has moderation enabled, but no Space Moderator is specified, who would get moderation notifications?**

The Global Moderators who are assigned here: **Permissions > System Administration > Moderate Content** . If there is no Global Moderator assigned, then moderation requests in that space would be sent to the Full Access user (assigned here: **Permissions > System Administration > Full Access** ).

For information, see [Moderation rules and notification hierarchy](#) on page 419 and [Moderation inheritance in groups and spaces](#) on page 422 to understand how the application notifies moderators.

### **How are moderators notified that they have content pending moderation?**

The alerts displayed on the Moderation icon show the number of unacknowledged moderation alerts. To understand the process flow of moderation, see [Setting up content moderation](#) on page 425.

### **I set a document to be editable only by me. Can a moderator edit this document?**

Yes. Moderation is set by place. So, if you create a document in a place that has moderation enabled, the moderator for that place can edit any and all documents submitted for publication in that place.

### **If I save a document as Hidden, can it be moderated?**

No. Your Hidden documents cannot be moderated.

### **What happens if I move moderated content?**

If you need to move content between a place that's moderated and one that's not, or between two moderated places, be aware of the following:

- If you move content from a group to a space, and both are moderated, items still awaiting moderation will be moderated as group content. New posts will be moderated as space content.
- If you move content from a moderated place to an unmoderated place, items that were already awaiting moderation will remain in moderator queues, but the item will appear to community users as if it were already approved.

## **Getting information about performance**

Jive provides tools by using which you can keep track of the application's performance and usage.

Additionally, you can connect your community to a web analytics application to get more detailed usage statistics.

To get the best results from your community, see [Fine-tuning performance](#).

## Examining database queries

*You can view the query expressions Jive uses as it interacts with its database. This is helpful when you're troubleshooting or looking for ways to improve performance. For example, you might use it to look for long-running queries or queries that are running too often.*

---

**Fastpath:**   **Admin Console: System > Management > Query Stats**

---

When you turn on this feature, the Admin Console displays the query expressions executed (without the actual values used), the number of times a query is executed, the time it took in milliseconds to execute a query, and the average time the query took.

---

**Note:** Turning this feature on and leaving it on slow performance. It's best to use this feature only while you're collecting performance information.

---

## Query Stats

### Query Statistics Status

☒ Enabled
 ☐ Disabled

### Query Statistics Settings

Refresh: None  |  |

### SELECT Query Statistics

Total # of selects	102
Total time for all selects (ms)	146
Average time for all selects (ms)	1.43
Selects per second	1.03
20 Most common selects	

Query	Count	Total Time (ms)	Average Time (ms)
SELECT jiveBlog.blogID AS theBlogID, jiveBlog.creationDate AS theCreationDate FROM jiveBlog , jiveBlogToUser WHERE jiveBlog.blogID > ? AND jiveBlog.blogID = jiveBlogToUser.blogID AND jiveBlogToUser.userID = ? ORDER BY theCreationDate DESC LIMIT 0, 400	1	1	1
SELECT name, propValue FROM jiveCommentProp WHERE commentID=?	1	0	0
SELECT fieldID, idx FROM jiveProfileField ORDER BY idx	1	13	13
SELECT count(*) FROM jiveAttachmentDL WHERE attachmentID=? AND downloadComplete=?	1	0	0
SELECT attachmentID, objectID, objectType, fileName, fileSize, contentType, creationDate, modificationDate FROM jiveAttachment WHERE attachmentID=?	1	0	0
SELECT blogID, name, displayName, description, creationDate, modificationDate			

## Using application logs

Jive logs messages containing application information, warnings, and errors in several different log files. You can view the log files in the Admin Console for troubleshooting purposes.

Typically, you would only use the Logging Management pages when working through an issue with a Jive support person.

The logs are built by using Apache log4J system. For more information about the log4J API, see Apache Logging Services portal at <http://logging.apache.org/log4j/2.x/index.html>.



You can also log information about database queries. For more information, see [Examining database queries](#) on page 433.

---

**Fastpath: Admin Console: System > Management > Logging Management**

---

## Configuring logging settings

On the **Configuration** tab, you can:

- Set the logging level for the application. This should be set to **Error** unless you are working through an issue with a Jive support person.
- View and apply overrides to logging levels. For example, if a user is experiencing unexpected behavior in the application, a Jive support person may ask you to adjust the logging levels for troubleshooting purposes.

## Using log files

On the **Log Viewer** page, you can:

- Insert a mark in a log file. This allows you to mark the problem spot and then monitor what happens after you reproduce the behavior.
- Force a log file roll. This is useful when you're looking for something specific in the log, but the file is very long. Forcing a roll restarts the log file at the beginning.
- View the log files.

Jive generates the following log files:

Log file	Description
[name].log	The main log file where almost all logging is sent.
[name]-session.log	Contains some logging information regarding when users log in and the number of active user sessions.
[name]-profil- ing.log [name]-latency.log	Some profiling options in Jive log to these files. However, the settings must be enabled, so typically, these files are empty.
[name]-doc- verse.log	Contains logging related to the document conversion process.

## Auditing administrative tasks

Jive logs actions you and others take and you can see them in the Admin Console. You might find these logs useful when you're tracking down the cause of an error or misconfiguration in the system.

---

**Fastpath: Admin Console: System > Management > Audit Log Viewer**

---



Each log entry includes the time the action was taken, the person whose action resulted in the entry, and the part of the application's code that was executed. For each log entry, you can also see the detailed description and identity (IP address) of the web app node that captured the action.

You can filter this page by user and date.

## Viewing system tasks

The **System Task Management** page in the Admin Console provides information for working with the Jive support team to troubleshoot issues. The page lists predefined tasks performed by the system as people are using the community.

---

**Fastpath:** Admin Console: **System > Management > System Tasks**

---

The tasks are grouped in categories and listed on different tabs.

## Integrating web analytics

You can connect your community with a third-party web analytics provider to track site navigation and marketing analytics on your Jive site.

---

**Fastpath:** Admin Console: **System > Settings > Third-Party Analytics**

---

You can use a web analytics tool like Google Analytics or Marketo to monitor what's happening on your Jive site by inserting tracking code in your Jive pages. This code sends information back to the web analytics provider each time a page on your site is accessed. Analytics results are not displayed anywhere in Jive: you can access them by using analytics reporting from your analytics provider.

By default, you can use Google Analytics or Marketo. If you need to implement a different third-party tool, please contact [Support](#).

Note that if you were already using this setting with a previous version, you can see a tab that allows a more free-form JavaScript implementation. This method is no longer recommended because of security risks.

---

**Note:** Jive's Analytics offerings don't have any connection to this third-party data collection. They use different metrics, and the results are not directly comparable.

---

To set up reporting:

1. In the Admin Console, go to **System > Settings > Third-Party Analytics**.
2. On the provider tab, select **Enabled**.
3. Enter your service ID in **Google Analytics ID** or **Marketo Munchkin ID**.
4. Click **Save Settings**.

The third-party analytics service is enabled in Jive.