Jive Interactive Intranet

Cloud Administrator Guide

Community Administration

Aurea
Unlimited Possibility

Notices

For details, see the following topics:

Notices

Third-party acknowledgments

The following third-party trademarks may appear in one or more Jive guides:

- Amazon is a registered trademark of Amazon Technologies, Inc.
- Apache and Derby is a trademark of Apache Software Foundation.
- Chrome is a trademark of Google Inc.
- Eclipse is a registered trademark of the Eclipse Foundation, Inc.
- HP-UX is a registered trademark of Hewlett-Packard Development Company, L.P.
- IBM, AIX, DB2, and WebSphere are registered trademarks of International Business Machines Corporation.
- Intel and Pentium are registered trademarks of Intel Corporation in the U.S. and/or other countries.
- JBoss is a registered trademark, and CentOS is a trademark, of Red Hat, Inc. in the U.S. and other countries.
- Linux is a registered trademark of Linus Torvalds.
- Microsoft, Active Directory, Internet Explorer, SharePoint, SQL Server, Visual Studio, and Windows are registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.
- Mozilla and Firefox are registered trademarks of the Mozilla Foundation.
- Oracle and Java are registered trademarks of Oracle and/or its affiliates.
- Progress and OpenEdge are registered trademarks of Progress Software Corporation or one of its subsidiaries or affiliates in the U.S. and other countries.
- Red Hat and Red Hat Enterprise Linux are registered trademarks of Red Hat, Inc. in the U.S. and other countries.
- SAP and SAP NetWeaver are registered trademarks of SAP SE in Germany and in several other countries.
- SUSE is a registered trademark of SUSE, LLC.
- Ubuntu is a registered trademark of Canonical Limited in the United States and/or other countries.
- UNIX is a registered trademark of The Open Group in the United States and other countries.

All other marks contained herein are for informational purposes only and may be trademarks of their respective owners.

Table of Contents

Aurea global support

If you encounter a problem while using an Aurea product or require assistance with downloading the software or upgrading a product release, please, try to:

- 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

Setting up 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 59 and Managing a community on page 254 sections of this guide.

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

For details, see the following topics:

Required Jive domains and firewall rules

For the Jive application to function properly, it needs to connect to external domains from the client side outside the primary instance domain. This topic lists such external domains that require an active connection.

Note:

- Apps, add-ons, tiles, stream integrations, and other third-party integrations may require access to additional domains not listed here.
- When creating firewall rules, both ports `80 (HTTP)` and `443 (HTTPS)` must always be allowed for each domain, unless otherwise noted.

Jive Core application (Cloud only)

- `https://assets.jiveon.com/`
- `https://assets2.jiveon.com`
- `https://static.jiveon.com/`
- `https://cdn.polyfill.io/`

If your organization utilizes whitelisting to connect your Jive instance to your organization's services behind your firewall, you need to whitelist the following IPs. This may be required, for example, if your Jive community is configured for LDAP directory syncing, and you utilize a whitelist on your firewall to allow your Jive community to connect to it.

- AWS US-East-1 Region: `34.192.45.122`, `34.198.91.162`, `34.231.78.214`, `34.225.172.123`, `34.193.143.104`, `52.55.123.87`, `52.20.222.9`, `34.230.231.2`, `34.197.60.63`, `52.207.30.159`, `3.213.1.211`
- AWS EU-West Region: `54.154.171.198`, `108.129.50.14`, `52.31.199.172`, `34.247.7.187`, `34.252.244.183`, `52.211.222.108`, `63.33.30.202`

AWS CloudFront CDN for Jive Core (Cloud only)

Jive Core relies on Amazon Web Services CloudFront content delivery network (AWS CloudFront CDN) for content distribution. You can download the current list of AWS Cloud Front IP ranges in JSON format provided by AWS at http://d7uri8nf7uskq.cloudfront.net/tools/list-cloudfront-ips at any time you need.

For example, the list in December 2019 includes the following IP ranges (in JSON format):


```
{"CLOUDFRONT_GLOBAL_IP_LIST": ["144.220.0.0/16",
"52.124.128.0/17", "54.230.0.0/16", "54.239.128.0/18",
"52.82.128.0/19", "99.84.0.0/16", "204.246.172.0/24",
"205.251.192.0/19", "54.239.192.0/19", "70.132.0.0/18",
"13.32.0.0/15", "13.224.0.0/14", "13.35.0.0/16",
"204.246.164.0/22", "204.246.168.0/22", "71.152.0.0/17",
"216.137.32.0/19", "205.251.249.0/24", "99.86.0.0/16",
"52.46.0.0/18", "52.84.0.0/15", "204.246.173.0/24",
"130.176.0.0/16", "64.252.64.0/18", "204.246.174.0/23",
"64.252.128.0/18", "205.251.254.0/24", "143.204.0.0/16",
"205.251.252.0/23", "204.246.176.0/20", "13.249.0.0/16",
"54.240.128.0/18", "205.251.250.0/23", "52.222.128.0/17",
"54.182.0.0/16", "54.192.0.0/16"],
"CLOUDFRONT_REGIONAL_EDGE_IP_LIST": ["13.124.199.0/24",
"34.226.14.0/24", "52.15.127.128/26", "35.158.136.0/24",
"52.57.254.0/24", "18.216.170.128/25", "13.52.204.0/23",
"13.54.63.128/26", "13.59.250.0/26", "13.210.67.128/26",
"35.167.191.128/26", "52.47.139.0/24", "52.199.127.192/26",
"52.212.248.0/26", "52.66.194.128/26", "13.113.203.0/24",
"99.79.168.0/23", "34.195.252.0/24", "35.162.63.192/26",
"34.223.12.224/27", "52.56.127.0/25", "34.223.80.192/26",
"13.228.69.0/24", "34.216.51.0/25", "3.231.2.0/25",
"54.233.255.128/26", "18.200.212.0/23", "52.52.191.128/26",
"52.78.247.128/26", "52.220.191.0/26", "34.232.163.208/29"]}
```

	For more information, see *Locations and IP Address Ranges of CloudFront Edge Servers* in the Amazon CloudFront Developer Guide at https://docs.aws.amazon.com/AmazonCloudFront/latest/DeveloperGuide/LocationsOfEdgeServers.html.
Jive Daily: Intranet on the go (Mobile app)	• `https://api.embed.ly` • `https://fabric.io` • `https://cdn.mxpnl.com/` • `https://api.giphy.com/` • `https://api2.appsflyer.com/` • `https://api.qordoba.com/`
Video module (Powered by Lexmark	• `https://video-svc.jivesoftware.com/` • `http://*.edgecastcdn.net/`

Perceptive Media) (Perceptive)	• `https://*.twistage.com/` • `https://*.alphacdn.net` • `https://*.omegacdn.net` • `https://*.betacdn.net` • `https://i.embed.ly/` **Important:** Jive is migrating from the Perceptive Media provider to the Jive video provider. Options and configuration relevant only for the Perceptive Media provider are marked with (Perceptive). They will be removed once the migration is finished.
Jive Rewards (Cloud only)	• `https://rewards.jivesoftware.com` • `https://rewards.imgix.net/`
New Relic (Cloud)	• `https://js-agent.newrelic.com/` • `https://bam.nr-data.net/`
StreamOnce	• `https://streamonce.prod.jivehosted.com`

Cloud Search service	• US customers only:
	  ◦ `search-ingress-adapter.aws-us-east-1-prod.svc.jive-hosted.com`
	  ◦ `search-query.aws-us-east-1-prod.svc.jivehosted.com`
	• EU customers only:
	  ◦ `search-ingress-adapter.aws-eu-west-1-prod.svc.jive-hosted.com`
	  ◦ `search-query.aws-eu-west-1-prod.svc.jivehosted.com`

Cloud Analytics service	• US customers only:
	  ◦ `ca-ingress.aws-us-east-1-prod.svc.jivehosted.com`
	  ◦ `ca-cmr.aws-us-east-1-prod.svc.jivehosted.com`
	  ◦ `ca-query.aws-us-east-1-prod.svc.jivehosted.com`
	• EU customers only:
	  ◦ `ca-ingress.aws-eu-west-1-prod.svc.jivehosted.com`
	  ◦ `ca-cmr.aws-eu-west-1-prod.svc.jivehosted.com`
	  ◦ `ca-query.aws-eu-west-1-prod.svc.jivehosted.com`

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.

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

- 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 others 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 the Admin Console

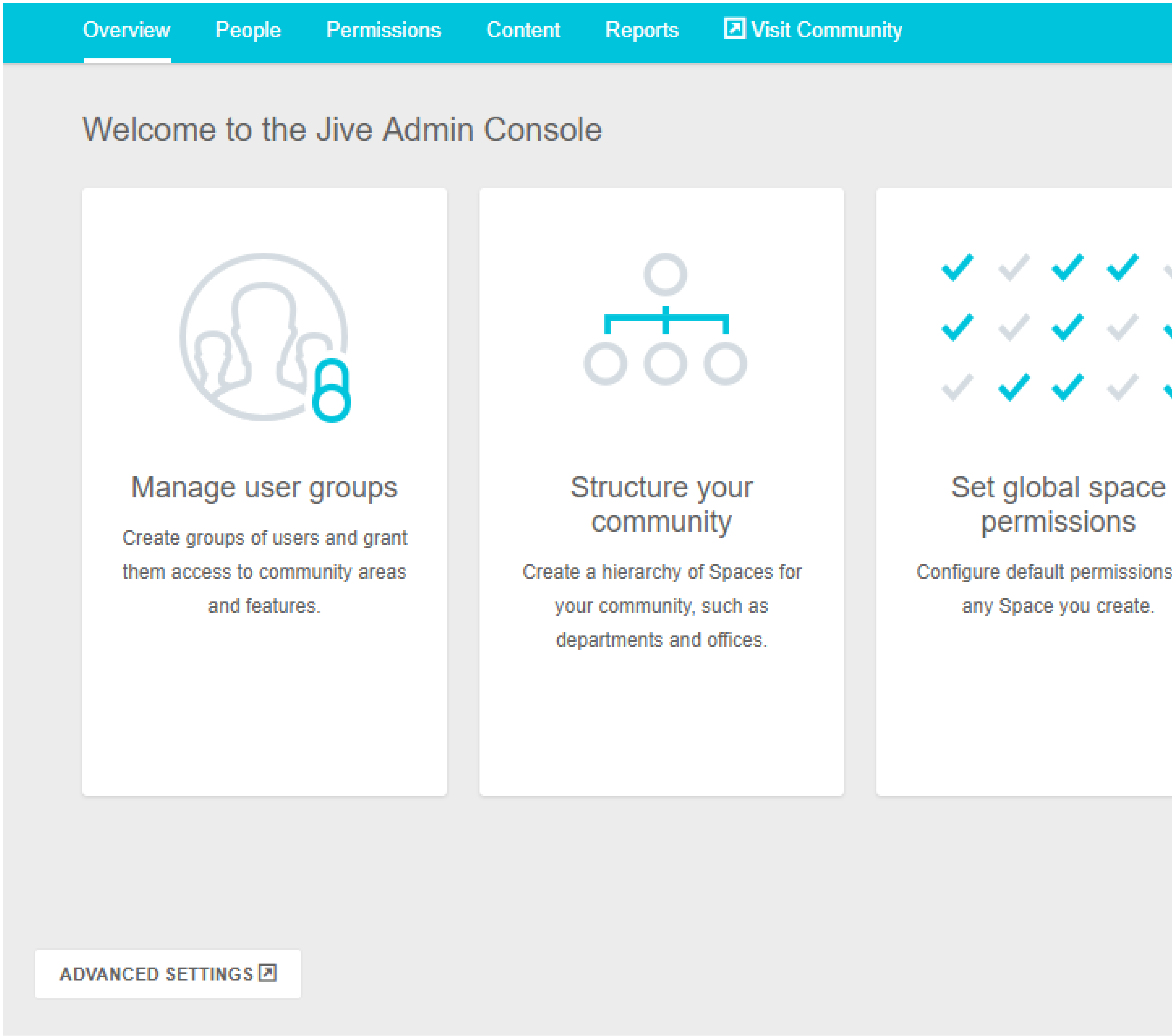
The Admin Console is an administration interface used to control and manage the Jive community site. As a community manager or administrator, you can access the

Admin Console to manage your Jive community settings, permissions, content (such as documents, discussions, and blogs), and people.

The Admin Console has two interfaces:

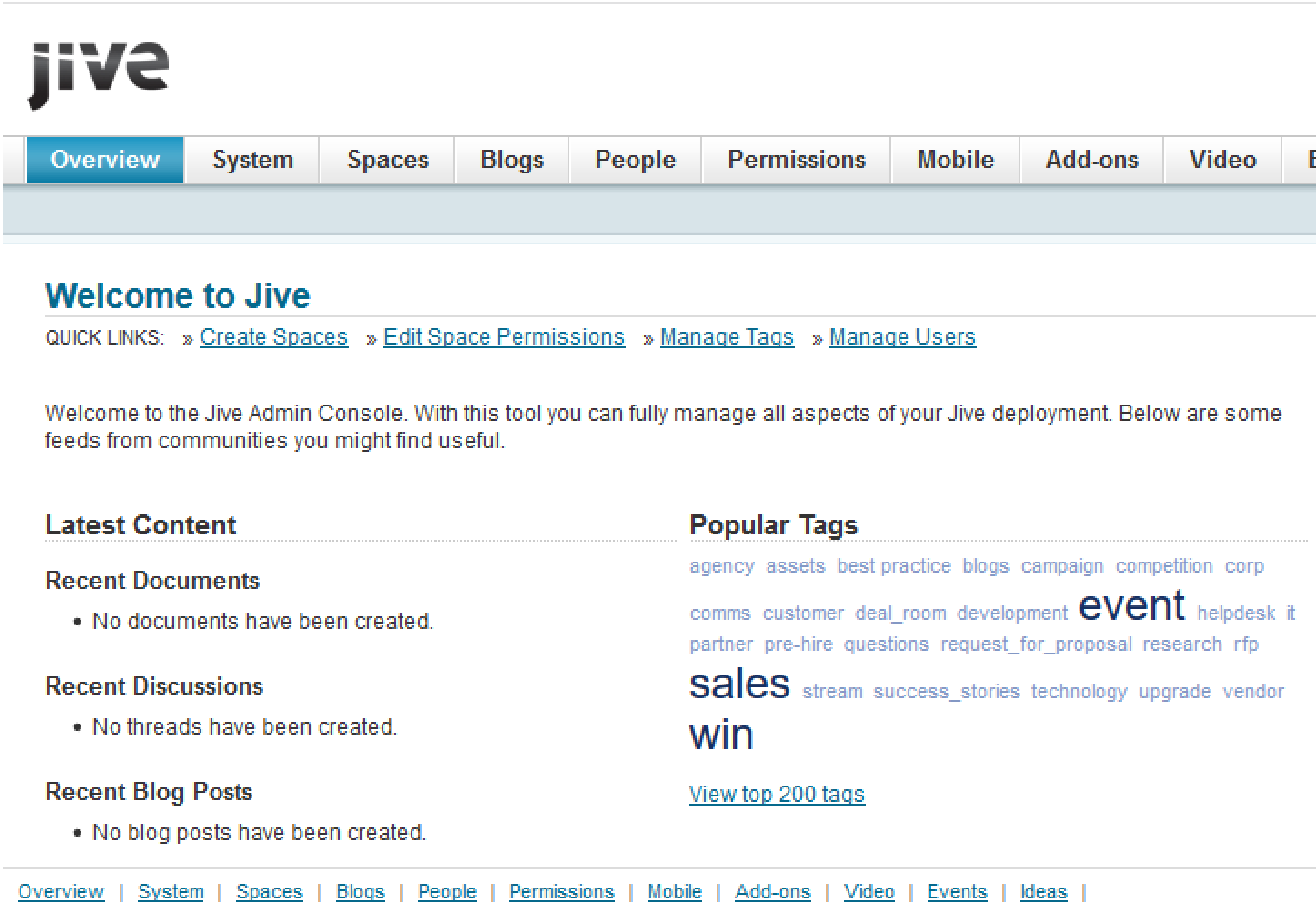
- Admin Console contains the most commonly used configuration options. It is the simplified subset of the Advanced Admin Console functionality.

Figure 1: The Admin Console



- Advanced Admin Console contains the all community configuration options.

Figure 2: Advanced Admin Console



Opening the Admin Console

To open the Admin Console from your community:

- To open the Admin Console, click your avatar in the upper right corner of the page and select **Admin Console** from the menu.

  Note that the Admin Console may be disabled for your community. In this case, this opens the Advanced Admin Console.

- To open the Advanced Admin Console from the Admin Console, click **Advanced Settings** in the bottom-left corner of the page.

To return to the user interface of your community:

- Click **Visit Community** in the main menu of the Admin Console.
- Click **Visit Site** in the upper right corner of the Advanced Admin Console).

Enabling or disabling the Simplified Admin Console

The feature option for enabling or disabling the simplified Admin Console interface is called **Simplified Admin Console**. For more information about enabling or disabling the feature, see Enabling or disabling the Simplified Admin Console on page 18.

Enabling or disabling the Simplified Admin Console

By default, the Simplified Admin Console is enabled in the community. If required, you can disable it.

Fastpath:

- **Admin Console** > **Overview** > **New Features Available**
- **Advanced Admin Console** > **System** > **Settings** > **New Features**

For more information about the Admin Console interfaces, see Starting the Admin Console on page 15.

To disable or enable the Simplified Admin Console:

1. Go to the configuration page:
   - **Admin Console** > **Overview** > **New Features Available**
   - **Advanced Admin Console** > **System** > **Settings** > **New Features**
2. To disable the interface, select **Disabled** next to **Simplified Admin Console**.
3. To enable the interface, select **Enabled** next to **Simplified Admin Console**.
4. Click **Save**.

Enabling Personal Insights

Personal Insights help the community users to gain visibility into their contributions. With the feature enabled, users can learn how the community is responding to the content they created.

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

Note: Note that only the data of the current and previous two calendar years is available in Personal Insights. For more information, see Update to our Jive Analytics Data Retention Policy on Worx.

To enable Personal Insights:

1. In the Admin Console, go to **System** > **Settings** > **Analytics** , and then select the **Personal Insights** tab.

 Note: You need at least the Manage Community administrative permission. For more information about permissions, see Overview of System Administration permission levels on page 384.

2. To enable Personal Insights on the profile page for all community members, select **Enabled** in **Personal Insights Settings**.
3. To **Allow everyone to view everyone else's Personal Insights**, select **Enabled** in the section.
4. Click **Save** to save the settings.

Creating community structure

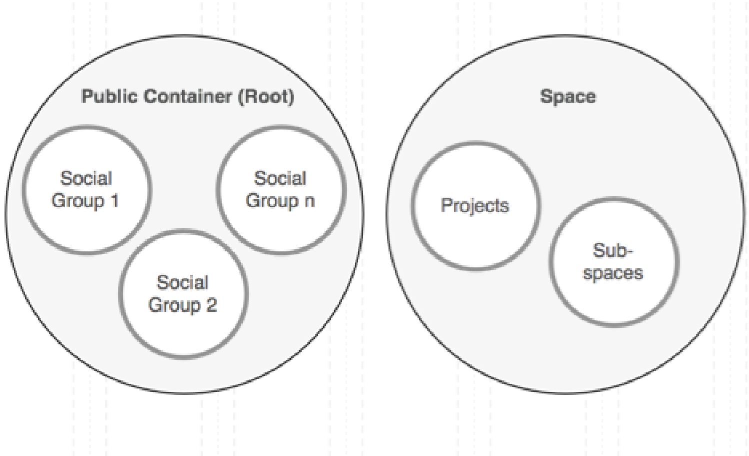
Creating a structure for content is one of the most important things you do to get your community started. Because people post content in various places, the places you create should help your users intuitively understand where to post (and find) content.

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 353 and Creating new spaces from the Admin Console on page 358.

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 353 and Creating new spaces from the Admin Console on page 358.

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.

For more information, see Using content and Types of groups in the User Guide.

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

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 47.
- The **Home page** of the entire community, if it is enabled. For more information, see Designing Home page of your community on page 71.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

- The **Your View page**, if it is enabled in your community. For more information, see Disabling or enabling Your View feature on page 121.
- The landing page of a place: an **Activity page** or an **Overview page** (place widgets must be enabled). For more information, see Place Templates for designing activity and custom pages for places on page 261 and Designing Overview pages for places on page 333.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

- 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 262.

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 and Adding Overview page.

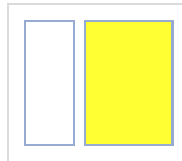
The following table shows where you can use tiles, and where you can use widgets.

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

The number of tiles on a page

When planning Activity or custom pages, take heed of the number of tiles on the page. A large number of tiles may degenerate Jive performance, including but not limited to page loading times and content responsiveness. This also applies to the user's Your View pages.

This is especially applicable to wide and custom tiles that are usually heavily impacting the performance. With this in mind, Jive has a limit on tiles per page:

- Wide tiles that take 2/3 of the page width  are limited to no more than 3 tiles per page by default.
- Custom tiles (listed under the **External Add-ons** category when you add a new tile) are limited to no more than 5 tiles per page by default.

Note: If required, the maximum number of wide tiles per Activity page can be increased up to five tiles. To increase the limit for your community, you need to file a support ticket with Support.

Theming community

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

Fastpath: User interface: Your Avatar > **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.

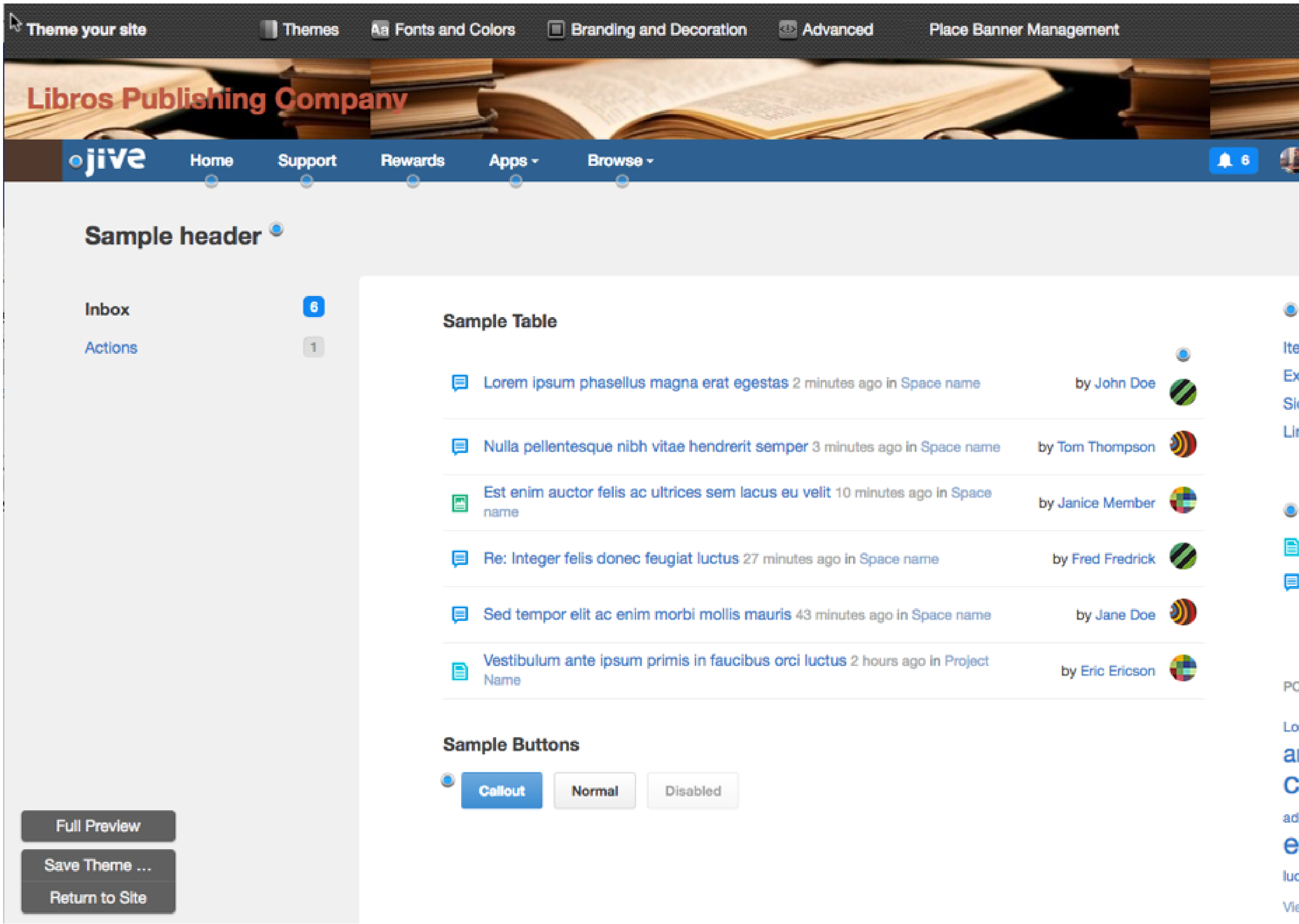
Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface. You can review what you can change by using out-of-the-box theming in Theming options reference on page 27.

Fastpath: User interface > Your avatar > 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 26.

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 29.
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 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 32 and Importing themes on page 32.

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 Importing themes on page 32, Exporting themes on page 32, Using predefined themes on page 26.
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.
Advanced: Header and Navigation Style	You can choose one the following options: **Reduced (default for new instances; upgraded instances retain their existing theme)**: 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. **Basic**: Includes a full navigation bar, header, large logo, and more options than Reduced for the other configurable items of the user interface. **Custom**: Enables you to customize the HTML and CSS of the header (and optionally, the footer). Additionally, you can choose to hide the header.

Field	Description
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 Creating custom links in the main menu on page 29.

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	Sets the community logo and background color and image of this header area. You can upload an image to be used as the logo image and specify in the **Alternate Text** box the alternative text for the image if a user for some reason cannot view it.
Branding Header and Navigation: Main Navigation	Sets the link colors, background color and image of the main navigation menu. **Note:** You can also customize the actual buttons that appear in this navigation menu. For more information, see Creating custom links in the main menu on page 29.
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.

Field	Description
Sample Widget	Sets the widgets 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.

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 3: Example of Custom Links

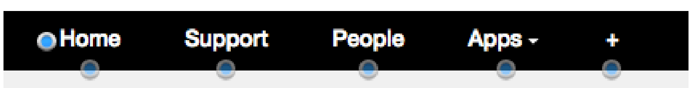
To create a custom link in the navigation menu:

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 4: 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 Custom Links Reference.
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	`/content`
People	`/people`
Places	`/places`
News	`/news`
Support	`/support`
Apps	Opens up the Apps menu when clicked. The Apps navigation button is displayed outside of the theming interface only if the apps market is enabled (**Admin Console: Add-ons** > **Cloud Settings**) and the user is not anonymous.
Rewards	`/rewards` Opens up the community's Rewards global leaderboard when clicked.
Browse	Creates a drop-down menu that contains at least one of the following predefined links: Content (`/content`), People (`/people`), Places (`/places`).

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 Pinning pages for quick access.
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 **Admin Console: System** > **Settings** > **Home Page** . For more details about the header options, see the Theming options reference on page 27.

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, 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 32.

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 32.

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**.

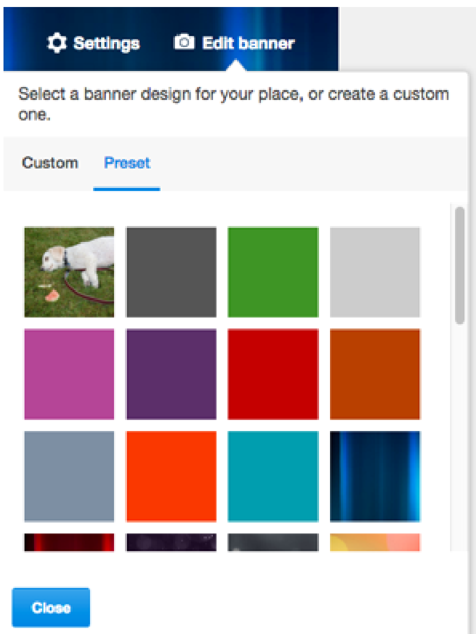
Now you should see the new theme in your list of saved themes. Click on it to see a preview of your community with that theme.

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 34.

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

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**.

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.

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** .

Managing Support Center

The Support Center streamlines how users find answers by dedicating a path to just that.

The Support Center provides a user experience focused on enabling self-help and community support with the goal of reducing the number of new support cases being created.

The Support Center:

- Helps users quickly find their answers by using predictive search and providing official answers.
- Discourages users from cluttering up the community with already-answered questions by providing a configurable layout so you can surface targeted topics and common answers.
- Gives users a place to easily ask the community a question if an answer doesn't exist.
- Lets you adjust the layout and style to reflect your organization's content and branding.

Here's a sample of how you might set up Support Center for an internal community for a space exploration company.

About Support Center

For an internal community, the Support Center saves time for all employees, those seeking answers and those providing them.

You could use the Support Center to collect answers that were previously scattered throughout your community, and pull them into one place. Employee service departments such as IT, HR, and Facilities, would find this feature useful for reducing the time spent answering common employee questions. The following list suggests content an employee support center might need:

- Onboarding guides and employee handbooks
- Benefits booklets
- IT troubleshooting topics
- Mobile phone access for your community
- Maintenance requests
- How to access a printer

Note: To enable the Support Center, you need to file a case with Support. For more information, see Getting started with the new Jive Support Portal on Worx.

Enabling Support Center

If you see Support in the main navigation menu of your community, then you have the Support Center enabled. Otherwise, you need to enable it.

Fastpath:

- **Admin Console** > **Content** > **Support Center**
- **Advanced Admin Console** > **System** > **Settings** > **Support Center**

To enable the Support Center:

1. Go to the configuration page:
    - **Admin Console** > **Content** > **Support Center**
    - **Advanced Admin Console** > **System** > **Settings** > **Support Center**
2. Select **Enabled**.
3. Click **Save**.

This enables the Support Center in your community. Now you need to enable custom links and add the Support Center button to the main navigation menu. For more information,see Adding Support link on page 39.

Adding Support link

By using the theming tool, you can add the Support link to the main navigation so users can access the Support Center.

Fastpath: Your avatar > **Themes**

To add the Support link to your community:

1. In the user interface, click **Your avatar** > **Themes** . If you already have Custom Links enabled, skip to Step Step 5 on page 39.
2. Click **Advanced** > **Custom Links** .
3. Select the **Custom Links Enabled** check box.
4. Click back to the main theming page.
5. Click the blue dot under the **+** mark.

   If you don't see a blue dot, you may have used all of the preset options, and you need to edit an existing one by selecting **Preset** > **Support** . (You can also rename it, as described in Remove or rename Support link on page 39).
6. Click **Save Theme**.
7. Click **Publish Theme on Save**.
8. Click **Save and Publish**.

Now you are ready to assign Support Center permissions to the person or group you want to design and maintain it. For more information, see Assigning Support Center permissions on page 40.

Remove or rename Support link

By using the theming tool, you can remove or rename the Support link.

Fastpath: Your avatar > **Themes**

Perform these steps to rename or remove the Support link from the main menu:

1. In the user interface, click **Your Avatar** > **Themes** . If you already have Custom Links enabled, skip to Step Step 5 on page 39.
2. Click **Advanced** > **Custom Links** .
3. Select the **Custom Links Enabled** check box.
4. Click back to the main theming page.
5. Click the blue dot under the Support button. You can:
   - **Delete navigation item** to remove the button from the navigation ribbon, or
   - Rename the Support button by selecting **Single** and then typing in the new name. For example, type `Support Ya!`, and then enter `/support` in the URL field, with the forward slash (`/`).

6. Click **Full Preview** to see how the change is going to look.

   When prompted to save the changes, give this new theme a name, such as Jive with Support Ya! or Jive without Support.

7. Click **Publish Now** or **Edit more** depending on what you want to do next.

Assigning Support Center permissions

You can assign Manage Support Center permission to the users who need to design and maintain the Support Center.

Fastpath:

- **Admin Console** > **Permissions** > **System Administrators**
- **Advanced Admin Console** > **Permissions** > **System Administration**

If it makes sense for your organization, you can give certain people the responsibility of managing the Support Center. If you want only certain users to manage the Support Center, create a user override or a user group and assign them the Manage Support Center permission. Note that the System Administrator and users assigned the Full Access permission also have management rights.

To assign permission to a user or user group:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **System Administrators**
   - **Advanced Admin Console** > **Permissions** > **System Administration**
2. Assign the **Manage Support Center** permission to either a user group or a user.
   - Assign this permission to a user by setting a user override. For more information, see Creating user overrides on page 383.
   - Assign this permission to a user group by creating a group and setting this permission. For more information, see Setting up administrative permissions for user groups on page 389.

After assigning this permission, any user with this permission can design the Support Center. For more information about designing the Support Center, see Designing Support Center on page 40.

Designing Support Center

Before you publish the Support Center to your community, you need to design it. It not only means choosing the colors and fonts you like but also adding content in the form of sections and places.

When you design the Support Center, think about how you can categorize the information you want users to see up front. Users can browse documents or requests in the places you added to the Support Center. Use sections to group these places and present essential topics in the order you find helpful.

You can change the background colors and images and also change the header text.

To configure the Support Center:

1. Click **Support** in the main menu.
2. Click **Configure** in the upper-right corner.

   You must have **Manage Support Center** permissions to see this option.

3. Once you are in edit mode, you can edit some colors and text. Click any blue box with a gear icon. Here's what you can do:

Options	Description
Background	Here you can edit the color of the Header text and the background. You can also upload a background image.
Header Text	Here's where you add the text that is the Support Center header.
Body Header Text	The body header text has two lines that you can add to the main part of the Support Center. It's a good place to talk about how people should use the sections you've set up.
Header Text for Support Channels	Here you can add a title to your Support Channels. You can use something like Still need help?, More ways to contact us or Let us know how we are doing.

4. Click **Add a Section** to create a new category for places in Support Center.

   Make the title describe the content users can find there, for example, Getting Started, Check on Your Orders, or Troubleshooting Tips.

5. Click **Add a Place** to add places to a section.

   Add places that belong to the section category. Keeping sections organized helps users find what they need, quickly. You can make it easy for a user to glance at a section and find the topic they've been looking for.

   Note: To learn about how to choose the five leading content items, see Designing Support Center on page 40.

   ---

6. Click **Add a Support Channel** at the bottom of the page.
7. Select **Publish Support Center on save** to make the Support Center visible to all end users.
8. Click **Save**.

Adding sections and places

Add places and sections to the Support Center so you can gather, in one location, topics that might help users.

Sections let you organize content from Jive places so users can easily find what they need. Add places to a section so users can see their featured, trending, or recent content. For example, you can create a Knowledge base section and add a space that contains knowledge base articles. If you don't have the Featured Content tile set up, then users see either Trending or Recent Content.

Setting up content

The Support Center displays the five most recent content items unless you have set up Trending Content or Featured Content.

Prepare content for the Support Center by deciding how you want the Support Center to display content. The order of precedence is Featured Content, Trending Content, and then Recent Activity. By default, the Support Center shows the five most recent content items for a place. Feature any content items, and you'll see them in the top five list for a place. Once content begins to trend by being liked or bookmarked, you'll see Trending Content instead of Recent Activity.

Adding other support channels

Add support channels so you can give your customers or users other avenues to contact you for Support if they need it.

Support channels provide ways for users to ask their questions when the answers are not in your community already. From creating a support request in your community to tweeting you, to calling or emailing, you can lay down the options you want users to take. It is also a great way to promote your social channels.

Enabling new features in your community

Some releases may include features that may or may not become part of the community features. You can enable or disable these features from the Admin Console.

Fastpath: **Admin Console: System** > **Settings** > **New Features**

We've added the following options to the New Features page.

Simplified Admin Console	Jive now includes the option to use a simpler admin console that we've redesigned based on real-world feedback from Jive community managers. With the Simplified Admin Console enabled, you see only the typically required settings grouped together in a more intuitive way.

Image Browse and Collections	Jive places now include an Images page where users can view images and organize them into collections to share with other community members. Place owners are also able to save and display collections for place members to view and share later. This feature is enabled by default, but you can disable it.
Group Membership Evolution	With this option enabled, social groups more closely reflect customer usage of group membership, as follows: • Open groups have been renamed to Public. • Public groups no longer have a concept of joining or invitation. All content in them is open for viewing and editing, unless any content item has been individually restricted. • Members Only groups have been renamed to Public (Restricted). • Public (Restricted) groups now allow non-members to create discussions, questions, and ideas, and to reply or comment on any content in the group. However, they cannot invite new members or create any other content types. • Members have the additional ability to invite more members, and to create all allowed content types. • Private groups have the same name and functionality as before. • Secret groups have been renamed to Private (Unlisted). • The group creation workflow has been changed to reflect the broader categories of Public and Private, with additional subtype selection. • The new naming conventions be reflected in place browsing and search.
Events Browse	With Events Browse enabled, places include an Events page where users can view a listing of the place's events, as well as filter them by tag, category, type, and date to view related events together. This feature is enabled by default, but you can disable it.
Profile Evolution	With Profile Evolution enabled, you see more relevant information at a glance. You see an optional banner at the top of your profile page now. Photos are now down the page in a Photos section. Your avatar is now your profile image. For more details, see the Onboarding Guide for this release on Worx.
Keywords in Content URLs	With this feature enabled, words from the title field of any newly created or updated content item are included as keywords in the content URL. This change improves SEO for Jive-x communities. Original title keywords are always used in the title no matter how much you edit the title. If you want to change the original title and

keywords in the content URL, you need to delete the content item and create a new one.

Note: After enabling Keywords in URLs you need to edit and then save existing content for it to begin using keywords in its URLs. Links to the original URLs continue to work.

HTML5 Document Previews

With this feature enabled, you can see document previews for uploaded files without using Flash. This feature supports the following formats: Microsoft Word, Excel, PowerPoint, and PDF.

Note: HTML5 previews do not currently support inline comments or document search.

Renaming the root space

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

Fastpath:

- **Admin Console** > **Permissions** > **Spaces**
- **Advanced Admin Console** > **System** > **Settings** > **Space**

To change the name of the root space in the Admin Console

1. Go to **Admin Console** > **Permissions** > **Spaces** .
2. Click > **Edit general information** next to the name of the root space.

   The root space is the top one in the list; it's called `community` by default.
3. In **Name**, enter the community name.
4. Optionally, in **Description**, enter the community description.
5. Optionally, in **Locale**, specify the default community locale.

   The default locale is `Inherit [English]`.
6. Click **Save Changes**.

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

To change the name of the root space in the Advanced Admin Console

1. Go to **Advanced Admin Console** > **System** > **Settings** > **Space** .

   This opens the **Space Settings** page.

2. 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.

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.

Fastpath:

- **Admin Console** > **People** > **Locale and Language**
- **Advanced Admin Console** > **System** > **Settings** > **Locale**
- **Admin Console** > **Permissions** > **Spaces** , then > **Edit general information** , then **Locale**
- **Advanced Admin Console** > **Spaces** > **Settings** > **Space Settings** , then **Locale**

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.

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.
    - **Admin Console** > **Permissions** > **Spaces** , then > **Edit general information** , then **Locale**
    - **Advanced Admin Console** > **Spaces** > **Settings** > **Space Settings** , then **Locale**
4. Locale set at the root space (global) level.
    - **Admin Console** > **People** > **Locale and Language**
    - **Advanced Admin Console** > **System** > **Settings** > **Locale**

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 with the Admin Console on page 420 and Configuring self-service user registration.

Community managers or users can also invite external contributors to join the community. For more information, see Adding external contributors on page 378.

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 166, Setting up LDAP and Active Directory on page 92 and Setting up Single Sign-On on page 100.

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.

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 48.
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. You must be a registered community user to see this content.

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 414.

   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. You must be a registered community user to see this content.

Turning off or on Top and Trending

Users with the Full Access permissions can toggle the **All Activity: Top & Trending** stream for the community.

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

To toggle **All Activity: Top & Trending** stream for the community:

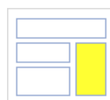
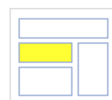
1. Go the configuration page:
   - **Advanced Admin Console** > **System** > **Settings** > **News**
2. In **Enable or disable top and trending content on news page**:
   - To turn on **Top & Trending**, select **Enabled**.
   - To turn off **Top & Trending**, select **Disabled**.
3. Click **Update**.

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

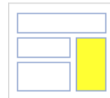
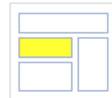
Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Document Viewer	Shows a full preview of a document you choose to display	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external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

Graphic Elements tiles

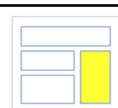
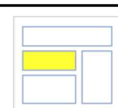
Tile	Description	Dependencies	Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Hero Image	Provides a key image with a link and call to action as a header for your News page	Content added manually				
Banner	Adds a series of linked images with text to promote important content	Content added manually				
Carousel	Links a rotating image carousel to crucialdestinations	Content added manually				
Create an HTML Tile	Adds HTML	Content added 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				

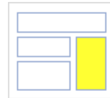
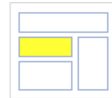
* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Expand-able Sec-tions	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important peo-ple for your place	Content added manually				
Helpful Links	Builds a list of key links for quick refer-ence. Links can be internal to your commu-nity or external URLs	Content added manually				
Key Con-tent and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually				

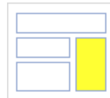
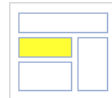
Dynamic List tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Featured Quest	Shows the us-er's progress as they com-plete 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				

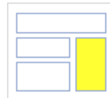
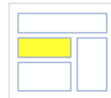
Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Leaderboard	Shows the top point earners in the community.	Internally-facing communities only				
News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on content from the News streams				
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 **Use this view in a tile** 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*	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				

* Content items can be excluded from the **Trending Content** tile.

Support tiles

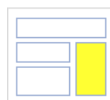
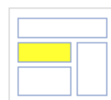
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Ask a Question	Finds a previ-ously asked or answered question, or gives the abili-ty to ask a new one	Relies on con-tent query. Configure to select content types and places to query				
Helpful Links	Builds a list of key links for quick refer-ence. Links can be internal to your commu-nity or external URLs.	Content added manually				
Super List	Shows an up-dated, filtered view of con-tent, people, or places.	Relies on a query: click **Use this view in a tile** at the bottom of any People, Places, or Content browsing re-sult				

External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Create an HTML Tile	Creates a cus-tom user expe-rience by in-serting HTML content into a tile for your place	Content added manually				*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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 peo-ple 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 private unlisted place to the News stream?

Yes, if you are an owner or member of the private unlisted place. Be aware when you add a private unlisted 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 private unlisted 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 30.
How do I turn off Top & Trending?	Contact your community administrator about turning off the **Top & Trending** News stream. Additionally, authors and community managers can exclude content items from the **Top & Trending** stream.

2

Configuring community

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

For details, see the following topics:

- Customizing News page
- Designing Home page of your community
- Theming community
- Setting up LDAP and Active Directory
- Setting up Single Sign-On
- Configuring content-related settings
- Configuring people-related settings
- Managing Impact Metrics
- Managing SEO in Your Community
- Managing search
- Setting up email
- Managing add-ons
- Setting up Records Retention
- Connecting communities with bridges
- Managing customizations
- Managing feeds
- Filtering web robots
- Jive security

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 48.
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. You must be a registered community user to see this content.

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 414.

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. You must be a registered community user to see this content.

Turning off or on Top and Trending

Users with the Full Access permissions can toggle the **All Activity: Top & Trending** stream for the community.

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

To toggle **All Activity: Top & Trending** stream for the community:

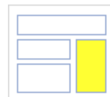
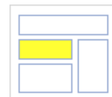
1. Go the configuration page:
   - **Advanced Admin Console** > **System** > **Settings** > **News**
2. In **Enable or disable top and trending content on news page**:
   - To turn on **Top & Trending**, select **Enabled**.
   - To turn off **Top & Trending**, select **Disabled**.
3. Click **Update**.

News page tile reference

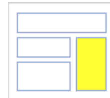
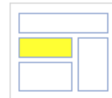
Here is a complete list of the tiles available on the News page of your community.

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

Collaboration tiles

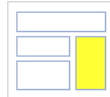
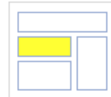
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
Document Viewer	Shows a full preview of a document you choose to display	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external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

Graphic Elements tiles

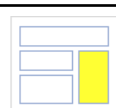
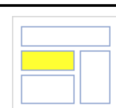
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
Hero Image	Provides a key image with a link and call to action as a header for your News page	Content added manually				
Banner	Adds a series of linked images with text to promote important content	Content added manually				
Carousel	Links a rotating image carousel to crucial destinations	Content added manually				
Create an HTML Tile	Adds HTML	Content added manually				*
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				

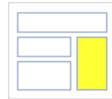
* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Widecolumn	 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				
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				

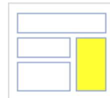
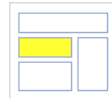
Dynamic List tiles

Tile	Description	Dependencies	 Narrow column	 Widecolumn	 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				

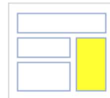
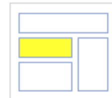
Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Leaderboard	Shows the top point earners in the community.	Internally-facing communities only				
News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on content from the News streams				
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 **Use this view in a tile** 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*	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				

* Content items can be excluded from the **Trending Content** tile.

Support tiles

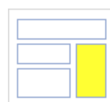
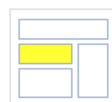
Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Ask a Question	Finds a previously asked or answered question, or gives the ability to ask a new one	Relies on content query. Configure to select content types and places to query				
Helpful Links	Builds a list 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 **Use this view in a tile** at the bottom of any People, Places, or Content browsing result				

External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually				*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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				

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 private unlisted place to the News stream?	Yes, if you are an owner or member of the private unlisted place. Be aware when you add a private unlisted 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 private unlisted 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 30.
How do I turn off Top & Trending?	Contact your community administrator about turning off the **Top & Trending** News stream. Additionally, authors and community managers can exclude content items from the **Top & Trending** stream.

Designing Home page of your community

The Home page is the page users see when they log in 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** **Admin Console: Advanced Settings** > **System** > **Settings** > **Home Page** > **Enable the widgetize community home page** .

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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

By default, the Home page is disabled in the community. However, when it is enabled, users are able to see the default widgets even if they are not yet completely set up. Before enabling it, ensure that you complete the configuration process of the Home page.

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 47.

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**

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

Note: This topic describes the options for what desktop users see when they log in 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 77.

Table 6: Home page options

Option	Description
Enable the main navigation create menu	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 Enabling or disabling Create menu on page 78.
Enable the widgetizedcommunity home page	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. **Note:** If you do not enable a community Home page, your users will see the News page (/news) when they log in.

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 343.

Configuring Home Page

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

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 74
   - Setting up Search widget on page 73
   - Setting up Ask widget on page 75
   - Setting up Answered Questions widget on page 76

   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 333.

   ---

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 Search widget

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

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 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 question 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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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.

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

The Home page for desktop users relies on widgets, which can't be viewed on a mobile device. You should specifically 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 8 tiles. This page view is also 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 includes more information about individual tiles. Note that 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 **Edit page** to configure these tiles or add different ones.
3. In **Welcome Message**, type up to 500 characters of the message you want to display at the top of the mobile home page. Note that this message is 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 on the widgets. You can use the arrows to move the widgets up and down.
5. Click **Save**.
6. If you want to preview the mobile page, go to the Home page of your community and resize your browser. When you 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** > **Enable the main navigation create menu**

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.

You can change how the menu is displayed, as described in Theming community on page 24. 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 356.

Tip: Status Update creation can also be enabled or disabled and is configured separately. For more information, see Configuring user update settings on page 177.

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 440.

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.

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
GroupOverview	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

Theming community

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

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

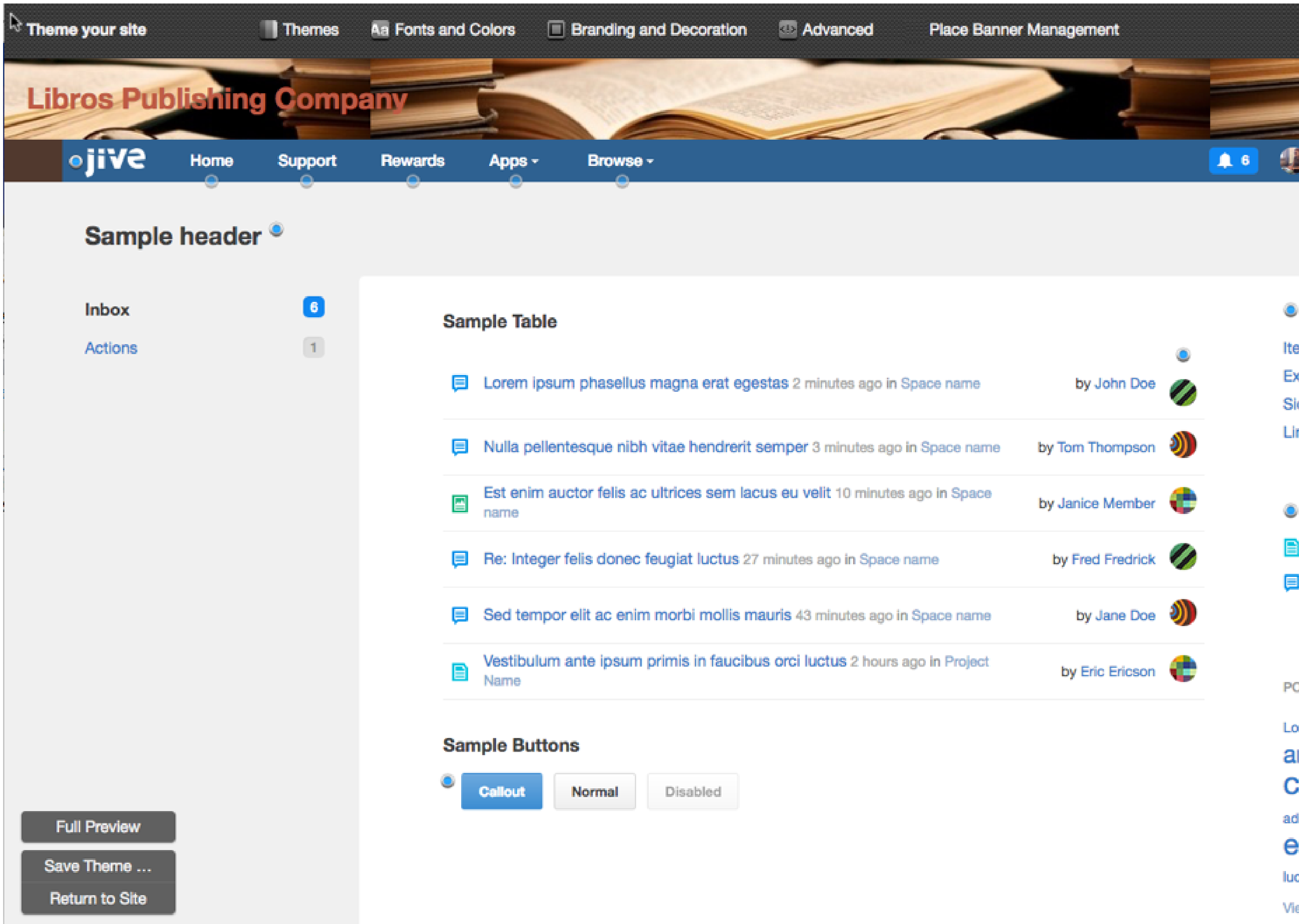
Note that only users with Manage Community or Customize Site permissions can see the Themes option under their user menu in the upper right corner of the user interface. You can review what you can change by using out-of-the-box theming in Theming options reference on page 27.

Fastpath: User interface > Your avatar > 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 26.

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 29.
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 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 32 and Importing themes on page 32.

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 7: 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 Importing themes on page 32, Exporting themes on page 32, Using predefined themes on page 26.
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.
Advanced: Header and Navigation Style	You can choose one the following options: **Reduced (default for new instances; upgraded instances retain their existing theme)**: 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. **Basic**: Includes a full navigation bar, header, large logo, and more options than Reduced for the other configurable items of the user interface. **Custom**: Enables you to customize the HTML and CSS of the header (and optionally, the footer). Additionally, you can choose to hide the header.

Field	Description
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 Creating custom links in the main menu on page 29.

Table 8: 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	Sets the community logo and background color and image of this header area. You can upload an image to be used as the logo image and specify in the **Alternate Text** box the alternative text for the image if a user for some reason cannot view it.
Branding Header and Navigation: Main Navigation	Sets the link colors, background color and image of the main navigation menu. **Note:** You can also customize the actual buttons that appear in this navigation menu. For more information, see Creating custom links in the main menu on page 29.
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.

Field	Description
Sample Widget	Sets the widgets 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.

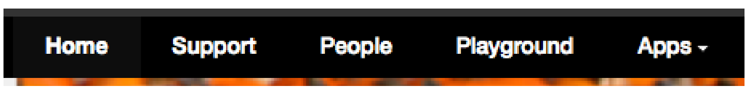
Creating custom links in the main menu

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.

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 5: Example of Custom Links



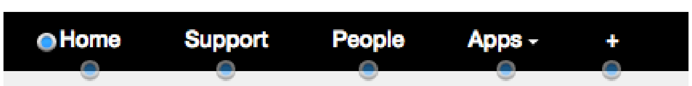
To create a custom link in the navigation menu:

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 6: 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 Custom Links Reference.
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 9: 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 10: Preset links options

Nav Bar Option	Links to
Content	`/content`
People	`/people`
Places	`/places`
News	`/news`
Support	`/support`
Apps	Opens up the Apps menu when clicked. The Apps navigation button is displayed outside of the theming interface only if the apps market is enabled (**Admin Console: Add-ons** > **Cloud Settings**) and the user is not anonymous.
Rewards	`/rewards` Opens up the community's Rewards global leaderboard when clicked.
Browse	Creates a drop-down menu that contains at least one of the following predefined links: Content (`/content`), People (`/people`), Places (`/places`).

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 11: 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 Pinning pages for quick access.
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 **Admin Console: System** > **Settings** > **Home Page** . For more details about the header options, see the Theming options reference on page 27.

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, 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 32.

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 32.

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**.

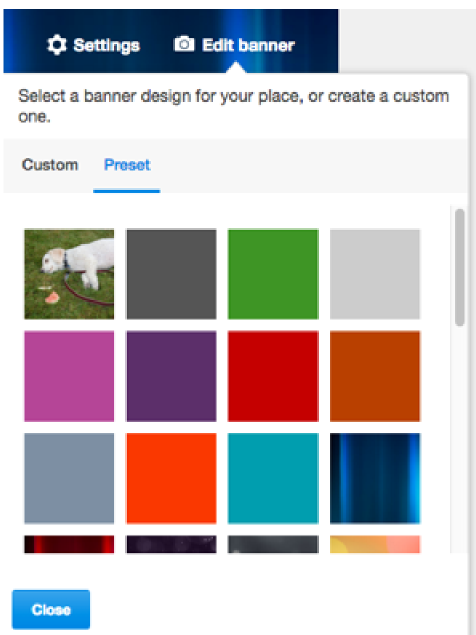
Now you should see the new theme in your list of saved themes. Click on it to see a preview of your community with that theme.

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 34.

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

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**.

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.

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** .

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 configuration 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 configuration page in the Admin Console:
   - **Admin Console** > **People** > **Directory Server**
   - **Advanced Admin Console** > **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 95.
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 97.

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 99.

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 99.

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. For more information, see Overview of directory server integration steps on page 93.

Fastpath:

- **Admin Console** > **People** > **Directory Server** , than the **User Mapping** tab
- **Advanced Admin Console** > **People** > **Settings** > **Directory Server Settings** , than the **User Mapping** tab

---

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. Go to the directory server configuration page:
   - **Admin Console** > **People** > **Directory Server**
   - **Advanced Admin Console** > **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. 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.
4. 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.
5. 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**.
6. Specify any profile fields you want to synchronize by providing the field information from your directory.
7. 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 93.

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. For more information, see Overview of directory server integration steps on page 93.

Fastpath:

- **Admin Console** > **People** > **Directory Server** , than the **Group Mapping** tab
- **Advanced Admin Console** > **People** > **Settings** > **Directory Server Settings** , than the **Group Mapping** tab

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.

To connect your LDAP groups to Jive:

1. Go to the directory server configuration page:
   - **Admin Console** > **People** > **Directory Server**
   - **Advanced Admin Console** > **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 95.
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 99.

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:: 2tnXRo7VxE6zc72YqLtOTw==
userAccountControl: 66048
badPwdCount: 1
codePage: 0
countryCode: 0
badPasswordTime: 128769530029375000
lastLogoff: 0
lastLogon: 128742007081093750
pwdLastSet: 128716053043750000
primaryGroupID: 513
```

```
objectSid:: AQUAAAAAAAUVAAAAF8sUcR3r8QcekDXQw9wAAA==
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. For more information, see Overview of directory server integration steps on page 93.

Fastpath:

- **Admin Console** > **People** > **Directory Server** , than the **User Synchronization** tab
- **Advanced Admin Console** > **People** > **Settings** > **Directory Server Settings** , than the **User Synchronization** tab

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. Go to the directory server configuration page:
   - **Admin Console** > **People** > **Directory Server**
   - **Advanced Admin Console** > **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. 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.
4. Click **Save Changes** to save the configuration.
5. 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.

Setting up Single Sign-On

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

Fastpath:

- **Admin Console** > **People** > **Single Sign-On**
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On**

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.

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 103.

- 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.

Note: You need Full Access administrator rights to configure SAML SSO. Support or another Full Access administrator in your organization can grant you this access.

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`.

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 92.

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 Jive 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:

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

We can typically assist with configuration 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.

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

ADFS

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

Siteminder

Use the Jive `entityID` as the Siteminder profile name	Typically, the Jive `entityID`, which is set by using the Base metadata URL in the **Advanced** tab of your SAML SSO settings, is the same as the `jiveURL`.

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** > **Single Sign-On** , then the **SAML** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** tab

For more information, see Understanding SSO with SAML on page 101.

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 101.

Setting up the IdP connection

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

1. Go to the configuration page:
    - **Admin Console** > **People** > **Single Sign-On** , then the **SAML** tab
    - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** tab
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 105.
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** > **Single Sign-On** , then the **SAML** > **Advanced** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** > **Advanced** tab

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. Go to the configuration page:
   - **Admin Console** > **People** > **Single Sign-On** , then the **SAML** > **Advanced** tab
   - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** > **Advanced** tab
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.

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:

- **Advanced Admin Console** > **People** > **Settings** > **Login Settings**
- **Admin Console** > **People** > **Single Sign-On** , then **Login Entry Page** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **Login Entry Page** tab

---

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 Configuring SSO with SAML on page 104.
2. In the Advanced Admin Console, go to **People** > **Settings** > **Login Settings** .
3. Select **Enabled** for **Enable Form-based Login**.
4. Click **Save Settings**.

   This enables a dual login page since SSO users will log in differently than non-SSO users.

5. Go to the **Login Entry Configuration** page:
   - **Admin Console** > **People** > **Single Sign-On** , then **Login Entry Page** tab
   - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **Login Entry Page** tab
6. 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. For more information about login entry page configuration, see Login pages on page 108.

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** > **Single Sign-On** , then **Login Entry Page** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **Login Entry Page** tab

---

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 determines 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 376, or enable the form-based login, as described in Mixed-mode authentication on page 107.

   Now the **Login Entry Page** tab becomes available on the **Single Sign On** page.
3. Go to the **Single Sign On** page:
   - **Admin Console** > **People** > **Single Sign-On** , then **Login Entry Page** tab
   - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **Login Entry Page** tab
4. 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.
5. 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.
6. 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** > **Single Sign-On** , then the **SAML** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** tab

---

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

Enabled	Enable this setting to enable SAML SSO for your community.

Debug Mode	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.
Username Identity, Merge Local Users	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 will be created through SSO auto-provisioning. Jive uses a permanent, unique identifier (`External ID`) to connect existing users with their SSO login. If users have never logged in by using SSO, they will not have an associated `external ID`. When **Username identity** is enabled, Jive maps any existing federated users to an existing user account using their username or email address during their first SSO login. To automatically federate existing users on login, you should also enable **Merge Local Users**. If you use **Username Identity** without enabling **Merge Local Users**, make sure your existing users are marked as federated users. Otherwise, non-federated users will not be synchronized.
Provision new user account on login	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.
Enable disabled user account on login	Enable this setting to reenable 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.
Response Skew	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 `NotBefore` check in the response. If you see an error indicating a problem with the `NotBefore` 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** > **Single Sign-On** , then the **SAML** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** tab

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

Request Signed	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.
Base metadata URL	This value sets the desired URL for the `entityID` and endpoint URLs. This URL should be an `https`. If you aren't using a URL with `https`, you need to get help from Support to continue setting up SSO.
Force Authentication	This setting forces any user with an existing IdP session to log in again.
Passive Authentication	When guest access is enabled, this issues a SAML AuthnRequest upon first access with `isPassive=true`, which should cause the IdP to redirect back to Jive if the user doesn't have an active session with the IdP.
NameID Format	For most IdPs, using the default setting is correct.
NameID Allow Create	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.
Sign Metadata	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.
IDP Want Response Signed	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 Support recommends it.
Requested AuthnContext	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.
Requested AuthnContext Comparison	Along with Requested AuthnContext, this optional setting is used to add additional information to requests in certain specific cases. It's disabled by default.
RSA Signature Algorithm URI	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 http://www.w3.org/2001/04/xmldsig-more#rsa-sha256. You may need to change this value if your IdP uses a different algorithm.
Group Mapping Enabled	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 SAML SSO group mapping on page 106.
Require Valid Metadata	Use this setting to determine whether the IdP metadata which you provide to Jive should be validated with respect to any `validUntil` timestamps. Some IdPs generate metadata with arbitrary `validUntil` timestamps on their metadata, which can cause validation to fail and keep Jive from running.

Include Scoping	Some IdPs may require a scoping definition. This option is disabled by default. If you use ADFS, it must remain disabled.
Proxy Count	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.
Validate InResponseTo	Defines if `InResponseTo` 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** > **Single Sign-On** , then the **SAML** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then the **SAML** tab

You can enable the debug mode by selecting the **Debug** check box on the **Single Sign-On** > **SAML** tab. 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 111 in Configuring SSO with SAML on page 104.
usernamedoesn'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.

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 111.

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 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** > **Single Sign-On** , then **General** and **External Login** tabs
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **General** and **External Login** tabs

---

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 115.

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. Go to the SSO configuration page:
   - **Admin Console** > **People** > **Single Sign-On**
   - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On**

4. On the **General** tab, select the **Enable Username Confirmation for New Users** check box.
5. On the **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 the instructions on obtaining the ID and secret on the Google IdentityPlatformathttps://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. Go to the SSO configuration page:
   - **Admin Console** > **People** > **Single Sign-On**
   - **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On**
2. On the **General** tab, select the **Enable Username Confirmation for New Users** check box.
3. On the **External Login** tab, under **Google OpenID Connect**, provide the client ID and secret.

SSO global settings reference

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

- **Admin Console** > **People** > **Single Sign-On** , then **General** tab
- **Advanced Admin Console** > **People** > **Settings** > **Single Sign-On** , then **General** tab

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, questions, and videos.

Available features

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

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.

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
Enable and configure	To select which badges users see, make sure that Structured Outcomes are **Enabled**, and then select the badges that to be displayed to users.
Disable	To disable this feature, click **Disabled**. 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 120.

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 thus 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
Minimum number of comments or replies before the Most Liked badge is displayed	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.
Minimum number of Likes on a comment or reply to be included under the Most Liked badge	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.
Maximum number of replies or comments to be displayed under the Most Liked badge	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.
Minimum number of replies flagged as Helpful before the question is marked Assumed Answered	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 community content types

You can define which content types users are able to create, such as blog posts, discussions, and documents. Here you can determine the settings for the whole community.

Fastpath: > **Content** > **Content Types**

You choose some or all of the available types for your community.

Note: If you would want to change the settings later, deselecting a content type does not remove existing content from your community, it only prevents people from creating new content of that type.

For more information about settings up content types for specific spaces, see Setting up allowed content types for spaces.

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. You can enable some of the content types and hide others from users. In space actions, the links for the hidden content types are removed.

For example, you can hide Documents, and the users won't be able to select and create Documents in the space. Also, the Document link in space Actions will be hidden.

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).

From this page you can set up content types only for a space you select under **change space**. The default content type settings for the whole community you can set from **Admin Console** > **Content** > **Content Types** . For more information, see Configuring community content types.

Configuring discussions application-wide

Application-wide discussion settings control useful but performance-intensive featuress 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 (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**.

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 362.

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 123.

Table 12: Discussion Feature Settings

Option	Description
Read Tracking	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.
Read Tracking Age Threshold	The number of days after which unanswered discussions are marked as read.
Thread Mode	• In the **Flat** mode, views display replies chronologically in the order they were received, and there is no indentation between responses. • In the **Threaded** 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. 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. When replies reach the maximum (the default is 100), replies appear flat even if you or the user has set them to appear as threaded. **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.

Table 13: Expert Settings

Option	Description
Correct Answers	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 **Correct Answer** on questions: • Community administrators • Owners of the place where the question was posted • The user who posted the question

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 125. These system-wide settings are common to blogging software.

Setting	Description
Blogs	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 **Permissions** > **Blog Permissions** . For more information, see Setting up global blog permissions for user groups on page 404.
Comments	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.
Ping Updates	Enables or disables ping updates.

Setting	Description
Ping Service URI Override	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.
Default Ping Service URIs	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.
Akismet	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 http://akismet.com/.

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 126.

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** > **Content** > **Spell Check**
- **Advanced 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. Go to the configuration page:
   - **Admin Console** > **Content** > **Spell Check**
   - **Advanced Admin Console** > **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**.

   Custom words are listed under **Current Custom Dictionary**. You can remove the any word if, for example, it has been mistakenly added.

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** > **Other Content 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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 343.

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. If you want a specific title to be displayed, contact Support. For more information, see Getting started with the new Jive Support Portal on Worx.

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#.U0XIvceppBI).
4. Click **Save Settings** when you're finished.

This enables the Social Media widget in the community.

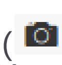
Managing images and collections

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 by default.

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. You can contact Support to make necessary changes. For more information, see Getting started with the new Jive Support Portal on Worx.

Uploaded images

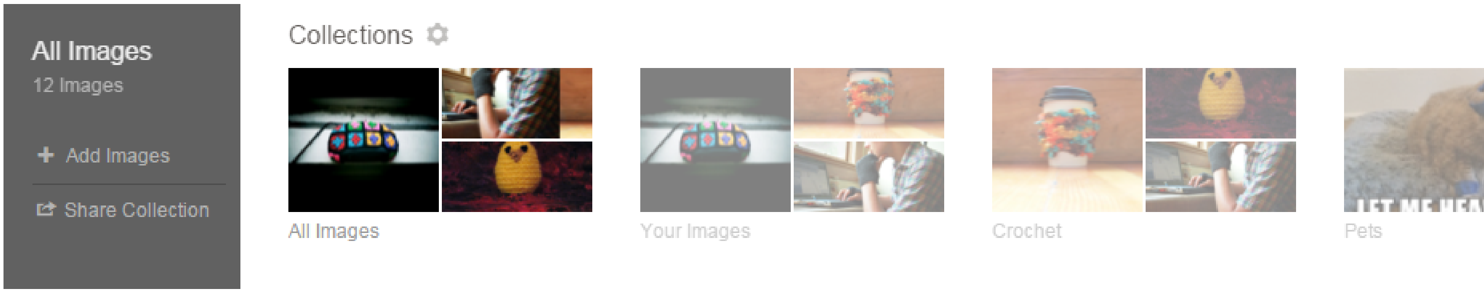
You can upload images to the community by selecting the **pencil icon** > **Files** . When you upload an image to a place, the image is added to the Images tab of the place. From here, you can create collections of images. For more information about collections, see Images and Collections in Jive Places in the User Guide.

Enabling collections

Depending on place permissions, community members can view images, organize them into collections to share, and save and display collections to view and share later.

Fastpath:

- **Admin Console** > **Overview** > **New Features Available**
- **Advanced Admin Console** > **System** > **Settings** > **New Features**



To enable collections in your community:

1. Go to the configuration page:
   - **Admin Console** > **Overview** > **New Features Available**
   - **Advanced Admin Console** > **System** > **Settings** > **New Features**
2. Under **Image Browse and Collections**, select **Enabled**.
3. Click **Save**.

With the feature enabled, Jive places include an **Images** page where users can view images and organize them into collections to share with other community members. Place owners are also able to save and display collections for place members to view and share later. For more information about collections, see Images and Collections in Jive Places in the Cloud User Help.

Note: The maximum size of an image that can be added to a collection is the same as the **Maximum image size** setting for your entire Jive community. If you want to change this setting for your Jive community (and for collections), you can go to **Advanced Admin Console** > **System** > **Settings** > **Images** .

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: **Advanced 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 132.

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.

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.

SharePoint For more information, see the Jive for SharePoint 2010 Help or the Jive for SharePoint 2013/2016 (v5) Help depending on SharePoint installation type.

Box.com For more information, see Box.com Integration in the More Integrations Guide.

Google Drive For more information, see Google Drive Integration in the More Integrations Guide.

Note: One more option for integration with Google allows users to works with Google documents directly from Jive. For more information, see the Google Drive Files and Docs Help.

Dropbox For more information, see Dropbox Integration 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 209 and visit the Jive Developers site at http://developers.jivesoftware.com.

Setting up video

Bring your Jive content to life by adding videos to your community that you can use in comments, replies, or content items.

You can add videos from other sites, such as YouTube or Vimeo, or upload your video files. Uploaded videos are visible only within the community, making this a more secure way to share videos that are specific to the community.

Videos that were created by using are known as *standalone videos* (or *video objects*). And videos that were inserted into other content items or comments are called *inline videos*.

You can upload video files to your community – these videos are called *uploaded*. Or you can choose to add a video in your community from another site, such as YouTube or Facebook, – these videos are called *embedded*.

Supported video providers and formats

Jive supports embedded and uploaded videos in content, comments, replies, and standalone videos.

Important: Jive is migrating from the Perceptive Media provider to the Jive video provider. Options and configuration relevant only for the Perceptive Media provider are marked with (Perceptive). They will be removed once the migration is finished.

Supported video providers

Uploaded standalone video (videos created from the pencil icon) sources:

- Jive Video provider for uploaded videos. For more information, see About Jive Video provider on page 137.
- Perceptive Media for uploaded videos (Perceptive)

Embedded sources for both standalone videos and inline in the body of other content types:

- Any Embedly supported sources, such as YouTube or Vimeo. For their complete list, see http://embed.ly/providers.

Custom support for the following sources:

- Brightcove - New Studio
- Kaltura Cloud
- Google Drive

Supported formats for uploaded videos

Supported video formats	MP4 (.mp4), AVI (.avi), MOV (.mov), MPEG (.mpg, .mpeg) By default, a video file selected for upload must be less than 2 GB and no longer than 4 hours. The maximum video duration can be adjusted for your community.
Supported caption / transcriptions file types	WebVTT (.vtt), DFXP (.dfxp), SRT (.srt), SAMI (.sami, .smi), SCC (.scc), TTML (.ttml) By default, the caption / transcription file size must not exceed 10 MB. The maximum file size can be adjusted for your community.

Supported image formats for thumbnails	JPG (.jpeg, .jpg), static GIF (.gif), BMP (.bmp), PNG (.png) By default, the video thumbnail should be at least 640 pixels wide with the file size less than 2 MB. Animated GIFs are not supported. The requirements for thumbnails can be adjusted for your community.

For more information, see Configuring video preferences on page 141.

Supported formats for uploaded videos (Perceptive)

Supported video formats	AVI, MOV, WMV, MP4, MPEG, FLV, 3GP, and 3G2
Supported video codecs	All of the popular MPEG-4 variants like DivX, XviD, H.264, 3IVX, MSMPEG4, and Windows Media 9
Supported audio codecs	MP2, MP3, WAV, AAC (typically seen in QuickTime files), Windows Media audio, and for mobile devices AMR in both narrow-band and wide-band varieties

About Jive Video provider

The Jive Video provider is used when you upload videos and view them directly in the community. This provider supports automatic speech recognition with the generation of captions / transcriptions and their translations to a number of languages. Here you can find an overview of how the provider works.

The Jive Video provider blends AWS Elemental MediaConvert, AWS Transcribe, AWS Translate with the native Jive functionality. Jive Video provider supports:

- **Thumbnails.** You can select one of the auto-generated ones or upload your custom images.
- **Captions / transcriptions and translations.** Captions / transcriptions in the video language and translated to other languages can be generated automatically or you can upload your own prepared files.
- **Video downloads control.** Video and caption / transcription downloads can be enabled or disabled for the community.
- **Video player enhancements.** Several options are available for users: time-indexed transcriptions, playback speed and quality options, customizable texts. This allows, for example, to get quality videos on different devices with the transcriptions displayed alongside the video.

Note that embedding videos from third-party providers, such as YouTube or Vimeo, employs another working process, and the experience with such videos differs.

A shortlist of video terms

Here you can find the basic video terminology that is used when talking about the Jive Video provider.

Caption	A text representation of the audio in the video. Captions usually describe what is being said.

Transcription	A text version of all of the words spoken in the video. In Jive, transcription is a visual representation of a caption file.
Video content	Video and related files uploaded by the user directly or created as an outcome of video processing, for example, captions and thumbnails.
Thumbnail	A static image that is displayed as the video cover. For example, thumbnails are displayed instead of videos in News and activity feeds.
Transcoding	The process of converting the video file into the required format for storage.
Transcribing	The process of converting speech to text.

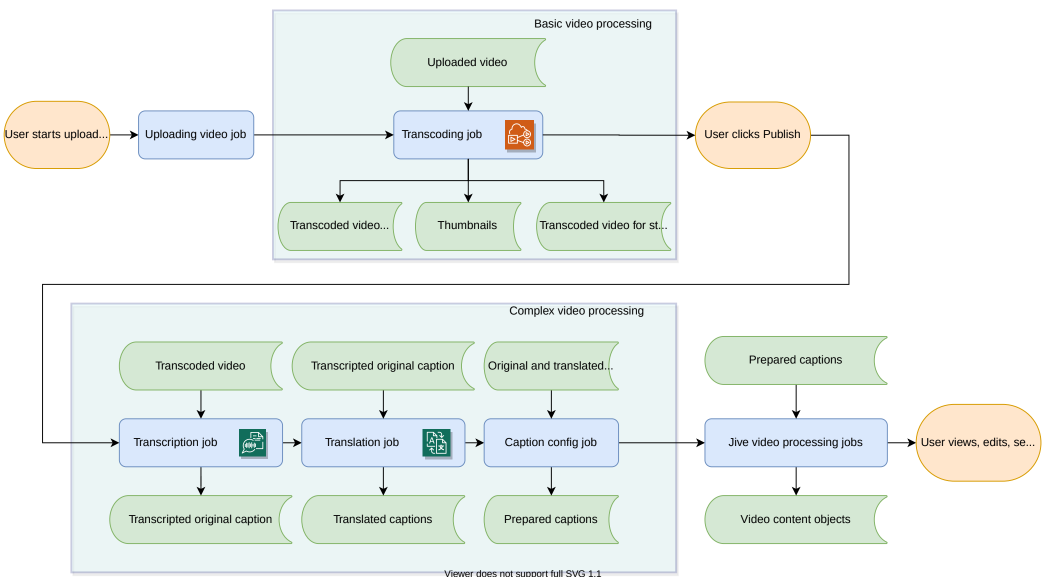
Formats and limitations

You can find information about supported video and caption / transcription formats at Supported video providers and formats on page 136.

How videos are processed: Uploading new standalone videos

Generally, every uploaded video file goes through the following steps.

Figure 7: Video processing with the Jive Video provider



1. A user uploads a video file.
2. Basic processing starts immediately after the file uploading finishes.

   During this stage, the video is converted to the storage format (MP4) and the streaming format (CMAF), and three thumbnail images are generated. While the video is processed, the **Publish** button is unavailable.

   Note: All video content is stored in the geographic region associated with your organization.

   ---

3. While the file is uploading, the user can add the metadata: type a title and description, add a custom image to be used as a thumbnail, select one of the caption / transcription options, and upload any prepared caption / transcription files if required.
    - If the auto-generated thumbnails are not satisfactory, the user can upload and use a custom image as the thumbnail.
    - Only one selected image (the one with the border around it) will be used as the video thumbnail.
    - If caption / transcription files are uploaded for any of the available languages, these caption / transcription files will be used; they won't be auto-generated.
4. Once all required metadata is filled in and the basic processing is over, the **Publish** button becomes available and the user publishes the video.
5. This starts the complex video processing.

    Complex processing includes converting speech to text and recognizing it, generating translations, and preparing captions / transcriptions so that they could be used on the interface. The processing time varies depending on the video size and the queue for AWS services at that time.

    By using the Advanced Admin Console, you can control what is generated for each video and some of the options available when uploading and viewing videos. For more information on the video configuration, see Configuring video preferences on page 141 and Video Preferences reference on page 145.

    Note that even though the video is already uploaded and you can even view it, it is accessible only by its direct URL during this stage.
6. Jive processes the uploaded video as any other content item.

    The major point of this step is adding all video metadata – both user-provided and auto-generated during basic and complex processing – to the search index.
7. Once all processing tasks are finished, the video becomes accessible through the interface, appears in feeds and searches.

How videos are processed: Uploading new inline videos

Unlike standalone videos, uploaded inline videos are processed using a limited version of the uploaded standalone video processing. Consequently, uploaded inline videos have the following distinctions:

- Inline videos are not transcribed and do not have any captions / transcriptions including translated ones.
- The first of the auto-generated thumbnails is displayed when the containing item is loaded.

Note that uploaded standalone videos can be inserted as inline videos as well. If such a video has captions, users will be able to view the video with captions; transcriptions are not supported. For more information, see Captions / transcriptions in standalone uploaded videos and Inserting inline videos into content items and comments in the Cloud User Help.

How videos are processed: Editing videos

You can edit uploaded standalone videos as any other content item. Embedded and uploaded inline images cannot be edited directly; but you can edit the containing content item or comment, delete the video in the text editor and then add another video.

When an uploaded standalone video is edited, it undergoes a process that is similar to a new video upload. However, some of the processing stages may be omitted if they are not necessary. The following describes the main video editing steps and which processes may be invoked on each step.

1. A user opens a video for editing and makes changes.

   If the user uploads a video file – be it a new version of this video or another video, – the video will undergo basic processing during this step.

   Alternatively, if the user edits only the video metadata (for example, renames the video), the video is not processed during this step; basic processing is skipped.

2. The user clicks **Update**.
3. If any present changes may affect the results of the previous complex processing of the video, clicking **Update** invokes complex processing for this video. Otherwise, this step is skipped.

   Either user actions or community configuration changes (or both) may cause a repeat of complex processing when editing videos. For example, a video has been uploaded when video translations were disabled – and this video does not have any automatic translations. Later video translations were enabled for the community. So, if you edit this video, it will undergo complex processing.

   The following changes invoke complex processing:

   - User-related changes:
     - The user uploads a new video file, either another version of the existing video or a new video.
     - The user uploads new custom caption / transcription files, either replacing previously uploaded files or adding new ones for other languages.
     - The user changes the video caption / transcription option.
     - The user changes the source language of the video.
   - Community configuration changes:
     - Translations have been enabled or disabled for the community.
     - The target languages have been changed for the community.

   When complex processing is triggered, all previously generated files are deleted and the video is processed as if it was a new video. Jive keeps only user-uploaded thumbnails and captions / transcriptions.

   Attention: Jive does not keep the previous versions of video files.

4. Jive processes the uploaded video as any other content item.
5. After the processing finishes, changes are saved, and metadata updated, the video becomes fully available in the community. The version number on the video is updated.

How videos are processed: Deleting videos

When a video is deleted, all video content is deleted including the user-uploaded thumbnails and captions / transcriptions.

Configuring video preferences

If you have the Video extension enabled, your community supports the ability to embed videos from other sites, such as YouTube or Vimeo. If you also have the Video Upload feature enabled, your community allows its members to record and upload videos.

Fastpath: **Advanced Admin Console** > **Video** > **Preferences**

Important: Jive is migrating from the Perceptive Media provider to the Jive video provider. Options and configuration relevant only for the Perceptive Media provider are marked with (Perceptive). They will be removed once the migration is finished.

To configure video in your community:

1. Go to the configuration page: **Advanced Admin Console** > **Video** > **Preferences** .
2. If required, configure the settings for the video extension under **Perceptive Video Preferences**(Perceptive):

Allow webcam	Select if you want users to be able to use their computer's webcam to record video for uploading.
Auto-Play	Select to automatically play videos when a user navigates to a video object (a standalone video file).
Auto-Play Embedded	Select to automatically play videos when a user navigates to content, comments, or replies containing an embedded video.
Allow video download	Select to allow users to download video objects (standalone video files). For more information on video downloads, see Downloading videos in the Cloud User Help.

3. Configure the following settings for the video player under **Video Player Settings**:

Enable captions	Select to turn on caption / transcription generation when video files are uploaded to the community. If this setting is disabled, captions / transcriptions are not generated for the uploaded videos and the existing captions / transcriptions are not displayed. If the setting is enabled again, captions / transcriptions will be generated only for the newly uploaded videos; captions / transcriptions won't be generated for the existing videos. **Note:** Captions / transcriptions settings are further defined under **Content Creation Caption Validation Settings**.
Enable download links	Select to display download links for videos. When enabled, users can download standalone uploaded videos and captions / transcriptions (both uploaded and generated).
Enable auto-play	Select to enable auto-playing videos when a video file or a content item with video embedded is opened.
Enable transcriptions	Select to add the **Auto Caption / Transcription** option to the video player UI. If you enable transcriptions, do not miss the transcription configuration in Step Step 5 on page 142.

4. Define the settings for uploading videos under **Content Creation Video Validation Settings**:

Maximum Video File Size (in MB)	Specify the maximum allowed file size for video uploads, in MB. It must be less than 2 GB per uploaded file.
Maximum Video Length (in minutes)	Specify the maximum allowed duration of video uploads, in minutes. It must be less than 4 hours per uploaded file.

5. Configure transcriptions for the Jive Video provider:

Enable transcriptions under Video Player Settings	Select to turn on transcription generation when video files are uploaded to the community. On the video player UI, enabling this option (a) adds **Auto Caption / Transcription** when uploading videos and (b) transcriptions when viewing videos. If this setting is disabled, transcriptions are not generated for the uploaded videos and the existing transcriptions are not displayed. If the setting is enabled again, transcriptions will be generated only for the newly uploaded videos; transcriptions won't be generated for the existing videos.

Languages supported for Automatic transcriptions (comma separated) under Content Creation Caption Validation Settings	Specify the list of languages in which speech must be recognized and transcribed into text. The list must contain language codes separated by commas without white spaces – for example, `en-US,de-DE`. **Note:** Jive uses Amazon Transcribe for speech recognition and supports all available languages. For the supported languages and language codes, refer to What Is Amazon Transcribe? on the AWS portal. Note that speech is transcribed only for the listed languages. So, all videos uploaded while a particular set is active will have transcriptions generated only for the listed languages. If more languages are added to the list, the older videos would not contain transcripts to the added languages. If some languages are removed from the list, the transcripts are not deleted but will not be displayed on the interface.

Attention: If the list of languages is empty, transcriptions will not be generated even if the **Enable transcriptions** option is enabled.

6. Configure translations for the Jive Video provider under **Content Creation Caption Validation Settings**:

Enable auto translations	Select to enable caption / transcription translation when video files are uploaded to the community. If this setting is disabled, translations are not generated for the uploaded videos and the existing translations are not displayed. If the setting is enabled again, translations will be generated only for the newly uploaded videos; translations won't be generated for the existing videos.

Languages supported for Manual and Automatic Translations (comma separated)	Specify the list of languages in which captions / transcriptions must be enabled for the community. The list must contain language codes separated by commas without white spaces – for example, `en,ro,fr`. **Note:** Jive uses Amazon Translate for translating transcripts and supports all available languages. For the supported languages and language codes, refer to Supported Languages and Language Codes on the AWS portal. Transcriptions are automatically translated only to the listed languages. So, all videos uploaded while a particular set is active will have translations generated only for the listed languages. If more languages are added to the list, the older videos would not contain transcript translations to the added languages. If some languages are removed from the list, the translations are not deleted but will not be displayed on the interface. **Important:** This capability is limited. By default, only two languages can be added on top of your community's default locale. For example, on a community with the `en` locale and default setting, you may add here `en,fr,de` or `fr,de` and won't be able to add `fr,de,es`. For more information about possible updates, contact your account executive.

Attention: If the list of languages is empty, translations will not be generated even if the **Enable auto translations** option is enabled.

The resulting translations depend on the user's choice:

- If a user selects **Auto Caption / Transcription**, Jive generates all caption / transcription files for all languages in **Languages Supported for Manual and Automatic Translations**.
- If a user selects **Upload Caption / Translation File** and uploads one or more custom caption / transcription files, Jive generates files for all languages other languages specified in **Languages Supported for Manual and Automatic Translations**.

7. Configure captions under **Content Creation Caption Validation Settings**:

Maximum Caption File Size, (in MB)	Specify the maximum allowed caption / transcription file size of video uploads, in MB. It must be less than 10 MB per uploaded file.

8. Configure thumbnail settings under **Content Creation Thumbnails Validation Settings**:

Maximum Thumbnail File Size (in MB)	Specify the maximum thumbnail image size, in MB. It must be less than 2 MB.
Minimum Thumbnail Width (in pixels)	Specify the minimum width for thumbnail images, in pixels. It should be more than 640 pixels.

9. Configure other settings for videos under **Content Creation General Settings**:

Upload Session Expiration (in seconds)	Specify the lifetime for a security cookie, in seconds. The default value is `3600` seconds.

Video Preferences reference

Details on Video extension preferences for your community.

Table 14: Perceptive Video Preferences **(Perceptive)**

Option	Description
Allow webcam	Indicates if users are allowed to use their webcam to record video for uploading. This setting is enabled by default.
Auto-Play	Indicates if standalone videos are automatically played when a user navigates to a video content item. This setting is disabled by default.
Auto-Play Embedded	Indicates if embedded videos are automatically played when a user navigates to content, comments, or replies containing embedded videos. This setting is disabled by default.
Allow video download	Indicates if users are allowed to download standalone video content items. This setting is enabled by default.

Table 15: Jive Video Provider Settings

Option	Description
Video Player Settings	
Enable captions	Indicates if video captions are enabled in the community. Captions are displayed on the video itself. This setting is enabled by default. If this setting is disabled, captions / transcriptions are not generated for the uploaded videos and the existing captions / transcriptions are not displayed. If the setting is enabled again, captions / transcriptions will be generated only for the newly uploaded videos; captions / transcriptions won't be generated for the existing videos.
Enable transcriptions	Indicates if transcriptions are enabled in the community. When enabled, transcriptions are generated for the uploaded video into the languages specified in **Languages supported for Automatic transcriptions (comma separated)**. And on the UI, transcriptions are displayed next to the video player when viewing videos and the **Auto Caption / Transcription** option is available when uploading videos. This setting is enabled by default. If this setting is disabled, transcriptions are not generated for the uploaded videos and the existing transcriptions are not displayed. If the setting is enabled again, transcriptions will be generated only for the newly uploaded videos; transcriptions won't be generated for the existing videos.
Enable download links	Indicates if download links are displayed for videos. When enabled, users can download standalone uploaded videos and captions / transcriptions (both uploaded and generated). This setting is enabled by default.
Enable auto-play	Indicates if video auto-play is enabled for uploaded videos for the community. This setting is enabled by default.
Content Creation Video Validation Settings	
Maximum Video File Size (in MB)	The maximum allowed video file size for uploading videos, in MB. Note that Jive has a limit of 2 GB (2048 MB) per uploaded file This is also the default setting. You can further narrow it for your community with this setting.
Maximum Video Length (in minutes)	The maximum duration of uploaded video files, in minutes. Note that Jive has a limit of 4 hours (240 minutes) on the duration of uploaded videos due to Amazon Transcribe limitations. This is also the default setting. You can further narrow it for your community with this setting. For more information on Amazon Transcribe limitations, see Guidelines and Quotas on the Amazon Transcribe portal.

Option	Description
Video Formats Supported(comma separated)	A list of video formats allowed for the community. The list must contain allowed video formats separated by commas without white spaces. The default setting is `.mp4,.avi,.mov`. Jive supports the following formats: MP4 (.mp4), AVI (.avi), MOV (.mov), MPEG (.mpg, .mpeg). You can further narrow it for your community with this setting.
Content Creation Caption Validation Settings	
Enable auto translations	Indicates if translations are enabled in the community. When enabled, users can upload custom This setting is enabled by default. If this setting is disabled, translations are not generated for the uploaded videos and the existing translations are not displayed. If the setting is enabled again, translations will be generated only for the newly uploaded videos; translations won't be generated for the existing videos.
Languages Supported for Manual and Automatic Translations (comma separated)	A list of the caption / transcription languages enabled in the community; caption / transcription translations are done only between the specified languages. The list must contain language codes separated by commas without white spaces – for example, `en,ro,fr`. The default setting is `en`. Jive uses Amazon Translate for translating transcripts and supports all available languages. For the supported languages and language codes, refer to Supported Languages and Language Codes on the AWS portal. Transcriptions are automatically translated only to the listed languages. So, all videos uploaded while a particular set is active will have translations generated only for the listed languages. If more languages are added to the list, the older videos would not contain transcript translations to the added languages. If some languages are removed from the list, the translations are not deleted but will not be displayed on the interface. **Important:** This capability is limited. By default, only two languages can be added on top of your community's default locale. For example, on a community with the `en` locale and default setting, you may add here `en,fr,de` or `fr,de` and won't be able to add `fr,de,es`. For more information about possible updates, contact your account executive. **Attention:** If the list of languages is empty, translations will not be generated even if the **Enable auto translations** option is enabled.

Option	Description
Languages supportedforAutomatic transcriptions (commaseparated)	A list of source languages for which speech can be automatically recognized and transcribed into text. Speech recognition is done only for the specified languages. The list must contain language codes separated by commas without white spaces – for example, `en-US,en-GB,de-DE,es-ES`. The default setting is `en-US`. Jive uses Amazon Transcribe for speech recognition and supports all available languages. For the supported languages and language codes, refer to What Is Amazon Transcribe? on the AWS portal. Note that speech is transcribed only for the listed languages. So, all videos uploaded while a particular set is active will have transcriptions generated only for the listed languages. If more languages are added to the list, the older videos would not contain transcripts to the added languages. If some languages are removed from the list, the transcripts are not deleted but will not be displayed on the interface. **Attention:** If the list of languages is empty, transcriptions will not be generated even if the **Enable transcriptions** option is enabled.
Maximum Caption File Size, (in MB)	The maximum size of caption / transcription files (for manual upload) for your community. Note that Jive has a limit of 10 MB per uploaded caption / transcription file, which is also the default setting. You can further narrow it for your community with this setting.
FormatsSupported for Captions (comma separated)	Types of caption / transcription files that are enabled for the community. The list must contain file extensions separated by commas without white spaces. For example: `.vtt,.dxfp,.scc,.srt,.ttml,.sami`. The default setting is `.vtt,.dxfp,.scc,.srt,.ttml`. Jive supports caption / transcription files in the following formats: WebVTT (.vtt), DFXP (.dfxp), SRT (.srt), SAMI (.sami, .smi), SCC (.scc), TTML (.ttml), which is also the default setting. You can narrow the selection for your community.
Content Creation Thumbnails Validation Settings	
Maximum Thumbnail File Size (in MB)	The maximum thumbnail image size, in MB. Jive has a limit of 2 MB per thumbnail, which is the default setting. You can further narrow it for your community with this setting.

Option	Description
Image Formats Supported for Thumbnails (comma separated)	Types of images allowed to be used as video thumbnails. The list must contain file extensions separated by commas without white spaces. For example, the default setting is `.png,.jpeg,.jpg,.gif,.JPG,.JPEG,.PNG,.GIF`. Jive supports JPG (.jpeg, .jpg), static GIF (.gif), BMP (.bmp), PNG (.png). Animated GIFs are not supported. You can further narrow it for your community with this setting.
Minimum Thumbnail Width (in pixels)	The minimal thumbnail image width, in pixels. Jive has a minimum of 640 pixels required, which is the default setting. You can require the thumbnails to be wider with this setting.
Content Creation General Settings	
Upload Session Expiration (in seconds)	The lifetime of a security cookie for video uploads, in seconds. The default value is `3600` seconds.

Table 16: Other options

Option	Description
Click here to export all videos	The link to download all video files, both new (from the Jive Video provider) and old from the video extension (Perceptive).

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 **Yes** if you want users to have the option to add a comment after they rate content.
Show Likes in Recent Activity	Select **Yes** 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.

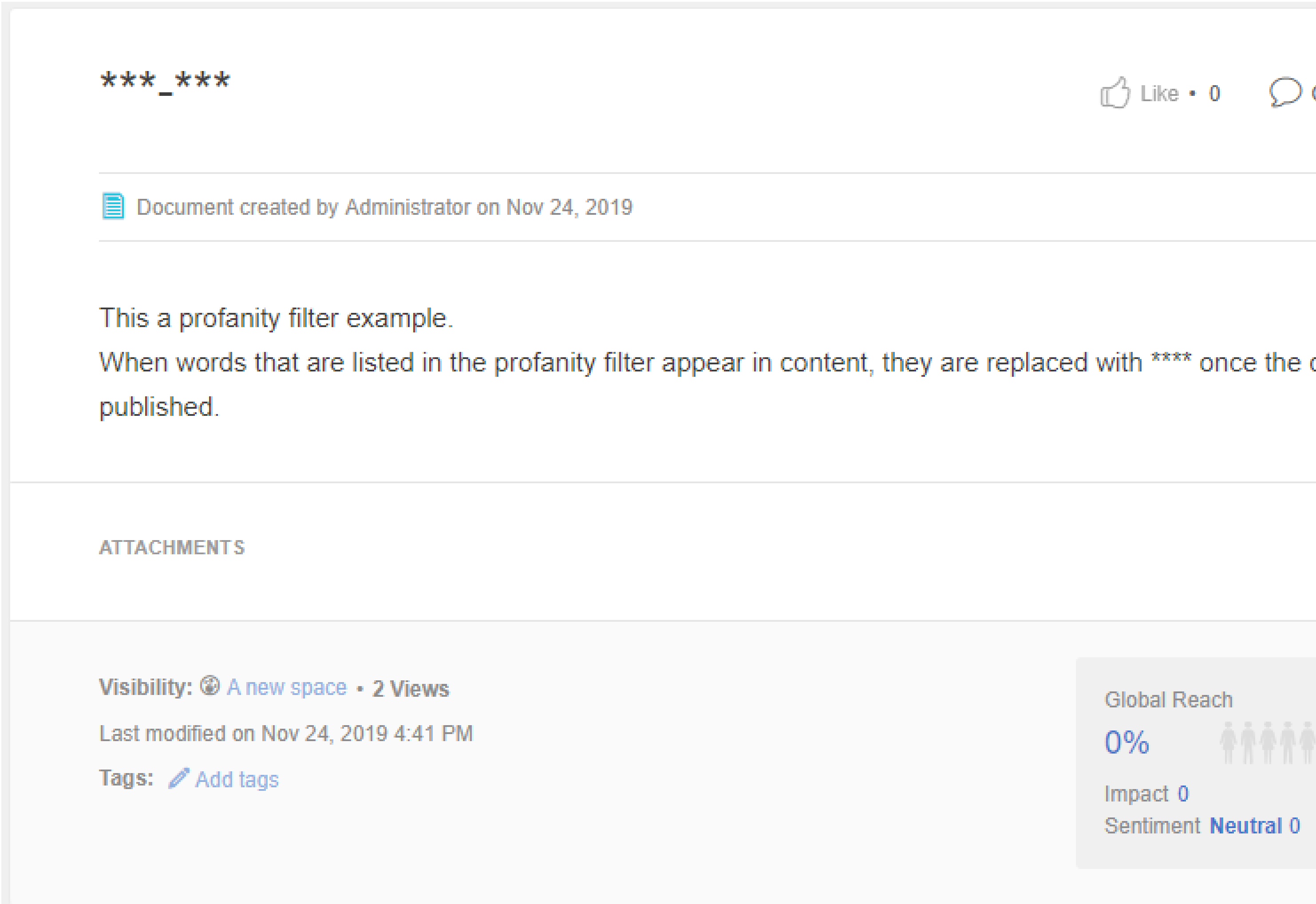
One of the most important filters you can enable is the Profanity filter on page 152. Another useful filter is the Emoticon filter on page 154.

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 151.



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 156.
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 202.

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 202.
- 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 440.

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 370.

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

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.

Use a keyword interceptor to search strings for keywords in incoming posts. 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 446.
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.

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 communities 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 in Jive 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 a 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 452.

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.

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.

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 172.

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 378.

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 127.

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 155.

Enabling abuse reporting

You can allows 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 363.

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 Moderation on page 440.

Enabling link moderation

You can required 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.

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 . Note that you must be a registered user to see this document.

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.

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.

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.

Managing Content Translation service

The Content Translation service integrates with Lionbridge GeoFluent, Google Translate, and Microsoft Translator to allow your community members to translate user-generated content in your Jive community.

Note: To turn on this functionality, contact Support.

Your community needs a license for Lionbridge GeoFluent (https://ww1.lionbridge.com/translation-localization-services/), Google Translate (https://cloud.google.com/translate/), or Microsoft Translator (https://translator.microsoft.com/) before you can enable the Content Translation Service. Once the Content Translation Service is enabled, your community members can translate user-generated content by clicking the **Translate** link in the **Actions** menu of published Jive content. For more information on enabling the service, see Enabling Content Translation Service on page 163.

Restriction: Translation is available for all content except Inbox items.

Translation FAQs:

What languages are available for translation?	It depends on which translation service provider you use (Lionbridge, Google, or Microsoft). Languages that are available from your provider will be available in your Jive community.
I don't think the translations are accurate. Can you fix this?	The Content Translation Service integrates with your service provider to make translated content available in Jive. Please contact your translation service provider (Lionbridge, Google, or Microsoft) for help with unexpected translations.
I want to translate the Jive application itself into another language. How do I do this?	The Content Translation Service is for translating user-generated content only, but Jive has already been translated into a number of languages that you can use. If you would like to use Jive in another language, change your language settings, as described in Supported languages.
My translation service provider charges on a	Encourage your community members to translate only the content they need. The **Translate** link at the top of

per-word basis. How can I manage these costs in my community?	a page translates the user-generated content on the page, but not the comments. If you need just one comment translated, use the **Translate** link in the **Actions** menu of the comment instead. **Tip:** To manage per-word translation costs, you can disable the Content Translation Service in your community temporarily and enable it again when you are ready, as described in Disabling Content Translation Service on page 164 and Enabling Content Translation Service on page 163.
What is the Translation Test Service option in the Service Provider list?	The **Translation Test Service** option is used by Support for troubleshooting. If you do select it, and then select the **Translate** link in Jive content, the text in your content will be capitalized, if the Content Translation Service is working. Leave the page, refresh the page, or select **Undo Translation** to reverse it.

Enabling Content Translation Service

Once the Content Translation Service is enabled, your community users can translate Jive content without leaving the community.

Your community needs a license for Lionbridge GeoFluent (https://ww1.lionbridge.com/translation-localization-services/), Google Translate (https://cloud.google.com/translate/), or Microsoft Translator (https://translator.microsoft.com/) before you can enable the Content Translation Service.

Remember: Make sure you have your license information from your translation service provider available when you start this enabling process.

Fastpath: **Admin Console: System** > **Settings** > **Content Translation Service**

To enable the Content Translation Service in your community:

1. In the Admin Console, go to **System** > **Settings** > **Content Translation Service**.
2. Select **Enabled**.
3. In the **Service Provider** list, select your translation service provider (Lionbridge, Google, or Microsoft).

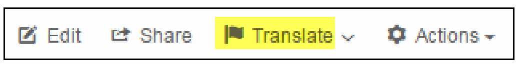
   Note: The **Translation Test Service** option is used by Support for troubleshooting. If you do select it, and then select the **Translate** link in Jive content, the text in your content will be capitalized, if the Content Translation Service is working. Leave the page, refresh the page, or select **Undo Translation** to reverse it.

4. Enter the license information that you received from your translation service provider.

Options	Description
If your service provider is Lionbridge	Enter an **Account Secret** and **Account Key**.
If your service provider is Google	Enter an **Account Key**.
If your service provider is Microsoft (Azure)	Enter a **Subscription Key**.

5. Click **Save**.

A Translate link appears in the Actions menu of published content in your community. Your community users can select it to translate user-generated content as described in Translating Content.



Disabling Content Translation Service

You can disable the Content Translation Service so that you can manage your community's per-word translation costs.

Fastpath: **Admin Console: System** > **Settings** > **Content Translation Service**

Important: Disabling does not suspend your Content Translation Service license with Jive.

To disable the Content Translation Service in your community:

1. In the Admin Console, go to **System** > **Settings** > **Content Translation Service**.
2. Select **Disabled**.
3. Click **Save**.

The **Translate** link is hidden in published content. You can enable it again, as described in Enabling Content Translation Service on page 163, when you want.

Removing content items from Top and Trending

If you do not want your blog post (or other content items) feature in the trending lists of your community, you can remove this post from the global lists.

Jive uses the Recommender service analyzes content and people over a period of time and uses that data to display the top and trending lists. The Recommender counts the things users do (create content, follow people, join groups, etc.) 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 then creates a list of users and content with the highest trending counts over a given time period.

The Recommender works globally for the whole community but some point you may want to remove your content items from the trending lists. If you use this option, your content items will not be displayed in:

- In the **Top & Trending** list in the News streams.
- On the **Recommended** tabs when you browse content (`/content?filterID=recommended`).
- In the **Trending Content** tiles.
- In the **Trending Now** section of newsletter emails.

You can hide items of the following content types:

- Status updates
- Discussions
- Questions
- Blog posts
- Documents
- Uploaded files
- Polls
- Events
- Ideas

Content authors and users with the Manage Users, Manage Community, Manage System, or Full Access permissions can remove a content item from Top and Trending lists.

To remove a content item from Top and Trending lists

1. Go to the content item.
2. Click **Actions** > **Remove from Top & Trending** .

To add a content item to Top and Trending lists

1. Go to the content item.
2. Click **Actions** > **Allow in Top & Trending** .

Configuring people-related settings

People-related settings pertain 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

You can give people the ability to change or securely reset their own passwords and define the strength of each password.

Fastpath:

- **Admin Console** > **People** > **User Registration**
- **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
- **Admin Console** > **People** > **Password Reset**
- **Advanced Admin Console** > **People** > **Settings** > **Password Reset**

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.

To enable and configure password reset:

1. Go to the **User Registration** configuration page:
   - **Admin Console** > **People** > **User Registration**
   - **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
2. Under **Security**, in the **Password Strength Check** section, specify how strong each user password must be.
3. In the **Human Input Validation** section, select **Enabled** to present a captcha.

4. Click **Save Settings**.
5. Go to the **Password Reset** configuration page:
   - **Admin Console** > **People** > **Password Reset**
   - **Advanced Admin Console** > **People** > **Settings** > **Password Reset**
6. Under **Password Resetting Status**, select **Enabled**.
7. Click **Save Settings**.

Additionally, you can to configure the template of the email confirming the password reset. For more information about setting up email templates, see Setting up email on page 201.

Configuring self-service user registration

You can configure the application so that new users can create their own accounts and invite others to join the community.

Fastpath:

- **Admin Console** > **People** > **User Registration**
- **Advanced 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.

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 169.

To enable and configure user self-registration:

1. Got to the configuration page:
   - **Admin Console** > **People** > **User Registration**
   - **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
2. Under **User-Created Accounts**, select the **Allow users to create their own account** to enable self-registration, 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.

- **Admin Console** > **People** > **User Registration**
- **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**

User-Created Accounts

Setting	Description
Allow users to create their own account	With this check box selected, user-created accounts are enabled, and registered users can invite others to join via email. For more information, see Inviting people to community on page 46. 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.
Require email address validation for users creating their own account	With this check box selected, self-registering users must validate their email. You can change the email template as described in Editing email notification templates on page 202.
Use Enhanced Registration Flow	With this check box selected, self-registering users can complete account creation before being approved by an administrator. This setting enables a simplified form with only required fields. If you have guest access enabled, users who complete the form can be directed to continue navigating the site while waiting for registration approval.
Enforce Community Domain list	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.
Allow new external contributors to create their own account when invited by email to an externally accessible group	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 Managing external groups on page 375.

Security

Setting	Description
Registration Moderation	With this enabled, new requests appear on the moderator page in the community (**Moderation** > **Pending Items** .) If you have a user administrator, that person must approve or decline requests; otherwise, the system administrator gets those requests. For more information, see Setting up user registration moderation on page 452.

New Account Settings

Use the following table to configure user account settings.

Setting	Description
Password Strength Check	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.
Human Input Validation	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 simply 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.
Email Validation Settings	With this feature enabled, the application sends an email to the person registering at the address they provided. You can edit the contents of the template used for the email. By default, the email includes a link that the person must follow to prove that the email address they gave is a valid one. This is another means to discourage false registration.
Welcome Email Settings	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.
Fields displayed at registration	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 Configuring user profile templates on page 436.

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**

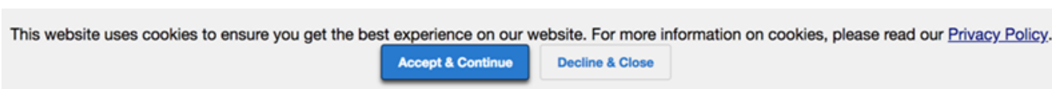
Setting	Description
Enable/Disable Terms & Conditions	With this enabled, the registration user interface displays the Terms and Conditions page you specify either by writing your own agreement or linking an external page by the URL.
Force existing users to re-accept modifications	With this enabled, users 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.

Setting	Description
Terms & Conditions source to be used	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 **Internal, from the editor below** in the **Terms & Conditions source to be used** box.
External Terms & Conditions URL	The URL of the external Term & Conditions Settings page that is displayed to the users if you specify **External, from the URL below** in the **Terms & Conditions source to be used** box.

Configuring Cookie Consent banner

You can enable the Cookie Consent banner in your Jive community to ensure that users must first acknowledge the cookies usage 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 242.

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 **Accept & Continue**. If they click **Decline and Close**, 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.

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.

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 107.

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 600 seconds. If users are unable to log in after more than five tries, the application forces them to wait for 10 minutes 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 simply 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**.

Attention: If only the values for **Login Throttling** and **Login Captcha** have been changed, the update will take effect after the instance restart.

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 202.

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.

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 ban specific actions of a user; for more information, see Managing interceptors on page 155.

For each person you ban, you set a ban level that determines whether you're banning them from logging in or merely posting content. You can also set the duration of a ban. Additionally, you can leave a record for other administrators by adding a comment, such as a note about the reason you banned the user.

Fastpath: Admin Console: People > **Settings** > **Ban Settings**

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 202.

Ban a user account

Through the Ban User Account tab, you can ban someone by specifying their username.

Configuring user's banning

To ban a user:

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**.

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.

Over time, people develop a reputation for reliability and authority in their favorite areas. The more people participate, the more information is available for the community as a whole.

For more information and configuration instructions, see the Rewards Guide at Rewards Help.

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 176.

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 453.

Resizing avatars

You can set the maximum height or width that uploaded avatars should be. The default size is 400 by 400 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 175.

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 400x400 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 175.

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 17: Status update configuration options

Setting	Description
Enable User Status Updates	With this enabled, users can post status updates that appear to the whole community.
Enable Reposting of User Status Updates	With this enabled, users can repost the status updates of fellow users.

Setting	Description
Enable Status Updates in Social Groups and Projects	With this enabled, users can post status updates in social groups and projects.
Character Limit	The character limit of a status update message. The default limit is 420.

Enabling Personal Insights

Personal Insights help the community users to gain visibility into their contributions. With the feature enabled, users can learn how the community is responding to the content they created.

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

Note: Note that only the data of the current and previous two calendar years is available in Personal Insights. For more information, see Update to our Jive Analytics Data Retention Policy on Worx.

To enable Personal Insights:

1. In the Admin Console, go to **System** > **Settings** > **Analytics** , and then select the **Personal Insights** tab.

   Note: You need at least the Manage Community administrative permission. For more information about permissions, see Overview of System Administration permission levels on page 384.

2. To enable Personal Insights on the profile page for all community members, select **Enabled** in **Personal Insights Settings**.
3. To **Allow everyone to view everyone else's Personal Insights**, select **Enabled** in the section.
4. Click **Save** to save the settings.

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, questions, and videos.

Available features

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

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.

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 Step 2 on page 180.
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 Step 2 on page 180-Step 5 on page 180 for each page that must be redirected.

The pages for which redirection is configured and active are displayed in the **Input URL** section on the **Redirection Rules** page.

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** > **Overview** > **New Features Available**
- **Advanced Admin Console** > **System** > **Settings** > **New Features**

Jive Cloud supports addition of 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

Adding keywords to existing content	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.
Editing the title	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.
URL integrity	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.
Keyword format	Case sensitivity: All words incorporated into the URL are lowercase • Delimiter: A hyphen "-" is used to separate words, special characters, and numbers • 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

Enabling keywords in URLs

To enable keywords in URLs:

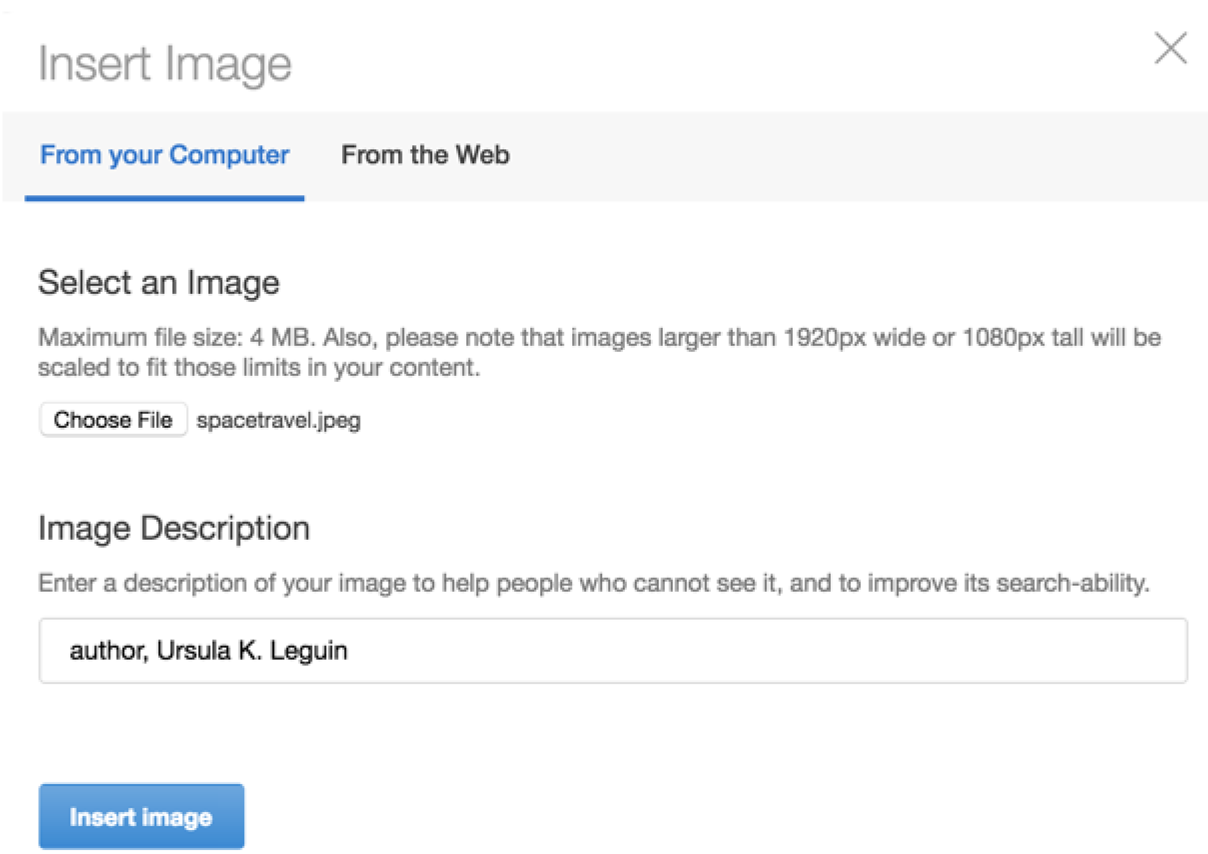
1. Go to the configuration page:
    - **Admin Console** > **Overview** > **New Features Available**
    - **Advanced Admin Console** > **System** > **Settings** > **New Features**
2. Under **Keywords in Content URLs**, select **Enabled**.
3. Click **Save** to save the changes.

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.



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 search

Jive provides configurable search access to content and people, as well as access to external search engines that support OpenSearch.

Cloud Search service

The Jive Cloud Search service enhances Jive search with infinite scale, continuous improvements, and an advanced social context. Here you can find how Jive Cloud search works.

About Cloud Search service

Jive Cloud Search service is available when you are using the Jive Cloud. It is enabled by default.

The Cloud Search service follows best practices for data separation. All data is written, stored, and accessed with a tenant-ID unique to the owner of the data, and no access to data for a given tenant-ID is permitted unless a client also presents a secret key for verification in accordance with OAuth. All communication is over HTTPS.

Attention: The Cloud Search service is based on the Amazon Elasticsearch service. If your organization requires you to whitelist IP addresses, see #unique_218 for the addresses you need to whitelist.

Cloud Search benefits

Cloud Search provides the following benefits:

Infinite scale	By leveraging a cloud-based Big Data infrastructure, the search service can scale to any level while providing full redundancy.
Continuous improvement	Because search is deployed as a separate service, it can be improved at any time without disrupting other Jive functionality. Just as with familiar web search tools, the relevance of Jive search results gets better over time.
Redesigned architecture	The Cloud Search Service is based on Amazon Elasticsearch Service. The main benefits are improved stability and performance, greater relevance due to enriching Jive objects with metadata, and reduce the downtime for reindexing of content, people and places. For more information about the employed services, see Amazon Elasticsearch Service on the AWS portal. **Attention:** The Cloud Search Service reindexes only the first 40,000 characters of each content item.
Better experience for users	Enhanced filtering options, user's search history, suggestions that are based on the context of your community, and other search aspects make using search more intuitive and comfortable for users. For example, spelling corrections when you search for people are provided from the community users corpus. And suggestions for content search are provided from the text corpus of your community, including the object metadata.

Basic search algorithm

Searching is done on the available fields, where a *field* is a single piece of information within the content, place, or user profile you're searching. For example, in a document, you have the title/subject, the content, and the tags. For a user, you have first name, last name, expertise, tags, and many more.

By default, Cloud Search uses `AND` search on types of searches; that means that all search terms must be present in the result. Users may specify search operators directly if necessary: `OR` if at least one term must be present, `NOT` to exclude specific words, and others. Additionally, users can apply special modifiers, such as quotes or keywords, to make search phrases more specific. The algorithm searches all included text, including attachments and comments – not just the initial blog post, document, or discussion. For more information on constructing search queries, see Search overview and Search rules in the Cloud User Help.

The results depend on what users are searching for: content, people, or places. For more information on how different search types work, see Content search on page 187 and People and place search on page 192.

Spotlight search and Advanced search

The Spotlight search appears at the top of each page. It's intended as the "quick access" search feature, with suggestions, frequently used items, and search history. So, when typing the first few letters in the search box you can see suggestions based on the quick search performed in the background – including content completion and spelling correction options. In order to initiate the search, you will need to click on one of the suggestions or press `Enter`.

In order to initiate the search, you will need to click on one of the suggestions or press `Enter`. At this point, the Spotlight search adds a wildcard (`*`) to the end of your search term. This means that if you're searching for `Library of Congress` and press `Enter` after typing `Librar`, it searches for `library`, `libraries`, and other words with the same stem, not just `librar`. Note that the Spotlight search searches for tags as well as content, people, and places.

If that is not enough, you can switch to the Advanced search. It offers more options to refine your search and does not apply the wildcard, as it expects you to provide all of your detailed criteria for the most specific results. For example, here you can limit a document search by author.

For more information, see Search and browse features and Using Spotlight search in the Cloud User Help.

@Mentions

When you start to @mention someone or something, Jive searched similarly to the Spotlight search. The search algorithm takes what you've typed in so far and adds a wildcard (*) to it. This means that no stemming is done with this search.

The main difference from the Spotlight search is that @mentioning only searches the title of content or place and username, name, and email of a user.

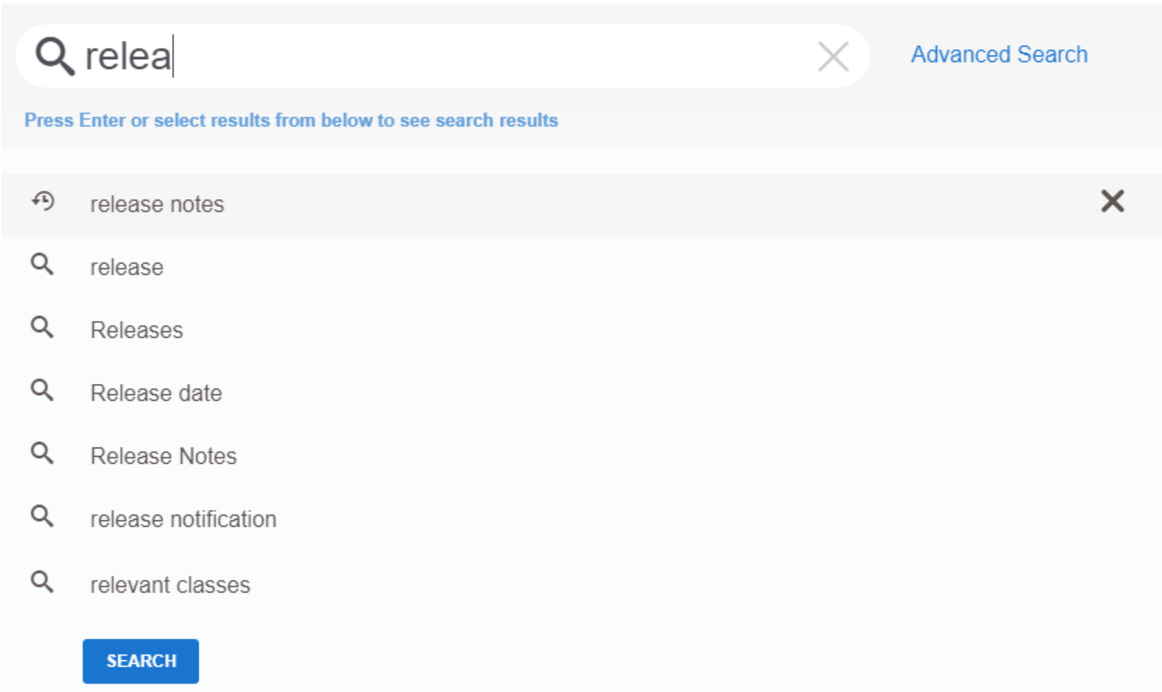
For @mentions, search synonyms work only on exact words (not suffixed with a wildcard `*`). For example, let's see how it works for a mention query that looks like this: `Alice_Ford OR (Alice AND Ford*)`. In this case, synonyms will be used for `Alice` only unless `Ford*` has been added to the synonyms list.

For more information about using @ mentions, see Search overview in the Cloud User Help.

Suggestions

The Cloud Search Service provides suggestions based on the index content. So, when you type first few letters in the search box you can see suggestions based on the quick search result done in the background for you.

Figure 8: Possible search suggestions when you type `relea`



These suggestions are based on a special multi-valued field data that is provided during document indexing; is field is not used in the regular search. For people search, it contains person first name and full name, for other content it contains the title (subject).

The search service checks for prefix matches that user types in the search box at the same time allowing fuzzy matching to be able to provide suggestions to correct some spelling mistakes. In practice, the first letter must always match. And the longer search phrase is the less exact matches are allowed.

Suggestions respect user access rights, as well as access to content and filtering by type. So if a user wants to search just for some blog post and they selected the **Blog posts** type filter, in suggestions, they will see only blog posts which they can access.

Note that suggestions are not affected by synonyms, both for content and people search.

Search configuration

For more information about configuring search, see Configuring content search on page 193, Configuring user search on page 197, and Configuring OpenSearch on page 198.

Content search

Here you can find how the Jive Cloud Search service searches for content.

When searching for content, Jive searches in content items available for users as follows:

- `subject`: Title field of Jive objects, such as place or doc title.
- `body`: Content of objects, such as blog post text.
- `tag`: Tags added to objects.

By default, Cloud Search uses `AND` search on content, meaning that items with at least one search term will be present in the results. Users may specify search operators directly if necessary; for more information, see Search rules in the Cloud User Help.

The results are then ordered by the relevancy score the items gain when users search for a specific search phrase. Stop words are excluded before search queries are processed.

Search relevancy

The relevancy rank is calculated as follows:

```
Rank = (SimilarityScore + ProximityScore) * OutcomeType * ObjectType * Recency
```

These parameters are explained in detail in Search relevancy in content and place search on page 188.

Searchable content types

The system searches for the search phrase in all of these content types:

- Direct message
- Poll
- Blog post
- Idea
- Announcement
- Document
- Question
- Discussion
- File
- Photo
- Status update
- Task
- Event
- Video
- External activity
- Comments on content

Users can limit the results to a specific content type by using filters.

Synonyms

You can define common synonyms for terms that are relevant for your particular system. For example, `docs` and `documentation` may be equal when searching. The searched word must match exactly the one from the synonyms list. So, if a user will add a wildcard (`*`) at the end of the word, the search will not include synonyms for this word (unless you add word ending with a wildcard to the synonyms list).

Note that the synonyms do not affect the suggestions but only search results.

For more information, see Configuring search synonyms for content items on page 194.

Search relevancy in content and place search

Getting the relevant results is critical for the success of the community. Here you can what parameters impact the relevancy score for content items and places and the rank a result will get when you search for a specific search phrase.

Jive searches object fields. Stop words are excluded. The parameters, described in this article, impact the rank of a content item and can provide a boost to get it to the top of the search results.

The relevancy rank is calculated as follows:

```
Rank = (SimilarityScore + ProximityScore) * OutcomeType * ObjectType * Recency
```

The resulting rank determines what will be displayed in the user's search results and in what order, with the objective to surface the most relevant content first.

Fields that are searched

Cloud Search uses information from the following fields:

- `subject`: Title field of Jive objects, such as place or doc title.
- `body`: Content of objects, such as blog post text.
- `tag`: Tags added to objects.

Attention: Stop words are removed before searching content from the object fields, as well as from the `Analyzed` and `Edgengram` fields.

Stop words

The Cloud Search service uses a predefined set of stop words for the specified languages. *Stop words* are common words often occurring in any text. For example, the stop words for the English language include `of`, `the`, `this`, `a`, and `and`.

When a search request is processed, these words are skipped from the searched object fields and the Analyzed and Edgengram sub-fields.

Similarity score

When searching for a phrase the system looks at each word in the phrase and checks the match type and place of match for this work. Each match type and place has its own boost score. The boost score is normalized with the number of times the searched term appears in the given content (the more it appears the better), as well as with the number of times this term appears in the search index (the more common the term is, the less impact it has on the rank). The default settings are listed in Table 18 on page 189.

Match types reflect how well your search query matches the results:

- **Raw**: Exact matches of the search term.
- **Analyzed**: Matches that are created by language analyzer. In this case, *stemming* is used, that is, looking for the root of the word. Stop words are ignored. For example, `focusing` will also find `focus`, `focused`, and other related words with the same stem.
- **Edgengram**: Partial match, used for wildcard search matches and matches in search-as-you-type queries. Stop words are ignored.

Table 18: Similarity boosts

Match place	Match type		
	Raw	Analyzed	Edgengram
`subject`	1.0	1.0	1.0
`body`	0.1	0.1	0.1
`tag`	0.5		0.5

Attention: Stop words are removed before searching content from the object fields, as well as from the `Analyzed` and `Edgengram` fields.

Proximity score

The proximity score checks how close is the term the user searches for to what appears in the content – to boost more relevant results. When a user searches for a phrase built from several words, this phrase may appear exactly the same way in the content or it may appear in the content in a slightly different way. For example, content with the term `product one-pager brochure` is an approximate match when searching for `product brochure`.

Types of proximity boosts:

- **Exact match**: When all the search terms appear in the content next to each other
- **Proximity match**: When all the search terms appear less than three words apart from each other

The default settings are listed in Table 19 on page 190.

Table 19: Proximity and exact match boosts

Place	Proximity boost	Exact match boost
Subject	0.5	1.6
Body	0.5	1.0
Tags**	0.1	1.0

** Having proximity score on tags is unlikely to happen.

Note: Exact and proximity matches are boosted using only `raw` sub-field for tags and only `analyzed` sub-field for other search fields.

A higher the boost value, more matches in the given field, and the match method get ranked higher. Stop words are ignored.

Besides the matches, we also look for frequency. The score has a lot to do with how many occurrences of the word user is searching for exists in the field. For example, if a 20,000-word essay makes a single reference to the movie `Finding Nemo` somewhere in the document and another document in the system has only 50 words and includes `Finding Nemo`, the latter is counted more relevant to a query for `nemo`.

Outcome type

Content in Jive can be marked with structured outcomes. These outcomes impact the score of that content in the search results, results are boosted based on outcome type.

The boosts given to content according to outcome type are listed in Table 20 on page 190.

Table 20: Outcome boosts

Outcome	Boost	Outcome	Boost
Finalized	1.4	Official	2.0
Outdated	0.1	Default	1.0

This score is being multiplied by the boosts above. A higher boost results in that content being ranked higher in the search results, so the 0.1 score for outdated documents significantly reduces their rank.

Object type

Similarly to outcome boost, there is a boost for ranks based on the type of content used. Documents and blogs are ranked higher in the search results as these are usually used for more comprehensive content that may be more relevant for the searching user. The settings are listed in Table 21 on page 191.

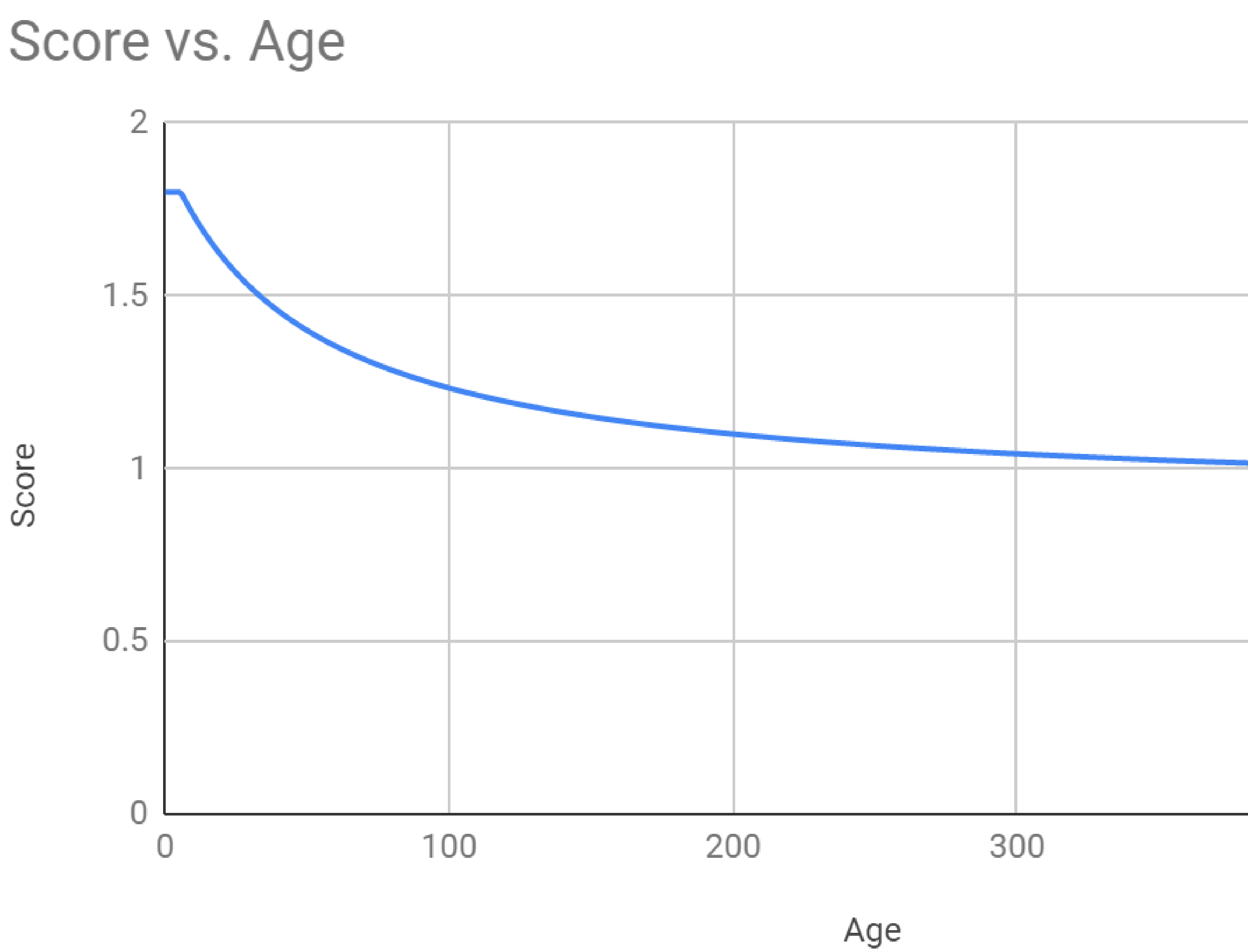
Table 21: Object boosts

Object	Boost	Object	Boost
Document	1.4	Poll	1.0
Blog	1.4	Idea	1.0
Blog post	1.4	Video	1.0
Discussion	1.0	Status Update	1.0
Question	1.0		

Recency

Recency (or *time decay*) lowers the score for older content. The impact of content can be seen this way:

Figure 9: Default recency boost



The recency score calculation is based on the following parameters:

Drop speed

Determines how fast the algorithm reduces the content score by age. The default setting in 50.

Max value

Determines the latest period the content from which has the same score without decay. The default setting is 4 weeks.

Minimum score

Determines the score difference of a very old document and a just created one as 2 times as maximum. It is set so that even the oldest relevant content can be found but allows preference for fresh content. The default setting is 0.9.

People and place search

In addition to searching for content, you can also search for users and places (such as spaces and groups). There are some important differences in these types of search.

@Mentions

When you start to @mention someone or something, Jive searched similarly to the Spotlight search. The search algorithm takes what you've typed in so far and adds a wildcard (*) to it. This means that no stemming is done with this search.

The main difference from the Spotlight search is that @mentioning only searches the title of content or place and username, name, and email of a user.

For @mentions, search synonyms work only on exact words (not suffixed with a wildcard `*`). For example, let's see how it works for a mention query that looks like this: `Alice_Ford OR (Alice AND Ford*)`. In this case, synonyms will be used for `Alice` only unless `Ford*` has been added to the synonyms list.

For more information about using @ mentions, see Search overview in the Cloud User Help.

User search

You can search for users both from the user interface and from the Admin Console.

When searching for users, the system uses the phrases and searches for them in each of the profile fields that user performing the search has access to (according to the user settings). However, you can't search for a user according to a specific profile field.

The user search uses the `AND` operator by default – that means that the results with all searched terms present will be listed first. Additionally, the boolean operators that users can specify directly work differently on some fields; for more information, see Search rules in the Cloud User Help.

You can define common synonyms for user names that are relevant to your particular system. For example, `Robert` may be equal to `Rob` and `Bob`. For more information, see Configuring search synonyms for user names on page 198.

Places search

When searching for places, the system searches the title, the description, and the tags.

By default, Cloud Search uses `AND` search on places, meaning that items with all search terms will be listed first in the results. Users may specify search operators directly if necessary; for more information, see Search rules in the Cloud User Help.

The search algorithm is similar to content search: a field that contains 5 words, one of which is a match, receives a higher score than a field that contains 25 words, one of which is a match. To make a place easier to search, you can use the search term in the title, description, and tag fields as many times as possible, with as few other words as possible.

The following types of places can be searched for:

- Space
- Group
- Project
- Personal blog

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.

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**

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.

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.

Attention: The Cloud Search Service reindexes only the first 40,000 characters of each content item.

: 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.

Configuring search synonyms for content items

You can configure the search feature to recognize synonyms for improved search results.

Fastpath:

- **Admin Console** > **Content** > **Content Synonyms**
- **Advanced Admin 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`.

Note that by default, new synonyms work only on new content. Thus, the changes become available in ~30 seconds, after the search index is updated.

To set up search synonyms:

1. Go to the configuration page:
   - **Admin Console** > **Content** > **Content Synonyms**
   - **Advanced Admin Console** > **System** > **Settings** > **Search** , then **Content Search** > **Synonyms**
2. Under **Synonyms**, type in a comma-separated list of synonyms for terms.
3. Click **Add Synonyms**.

   The added list appear as a line under **Current synonyms**.
4. Rebuild the content search index.

   For more information, see Reindexing content search on page 193.

After synonyms are added, the indexing is updated automatically and in ~30 seconds the newly added synonyms will be available in search.

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** > **Content** > **Promoted Results**
- **Advanced 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 you want to shange the limit, you can contact Support.
- 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. Go to the configuration page:
   - **Admin Console** > **Content** > **Promoted Results**
   - **Advanced Admin Console** > **System** > **Search** , then **Content Search** > **Promoted Results**
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 links for promotion as follows:
   a) In **Priority**, select 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.

Reindexing user search

Search index is rebuilt automatically in the background, but you can manually reindex user search if necessary. We don't recommend reindexing manually unless you have a specific search index problem you need to fix.

Fastpath: Admin Console: System > **Settings** > **Search** > **User Search** > **Index Tasks**

You should only manually rebuild only if you really have to.

: 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 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** > **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** .
  b) On the **User Search** > **Index Tasks** tab, 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** > **Content** > **User Synonyms**
- **Advanced Admin Console** > **System** > **Settings** > **Search** > **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`.

Note that by default, new synonyms work only on new content. Thus, the changes become available in ~30 seconds, after the search index is updated.

To set up search synonyms:

1. Go to the configuration page:
   - **Admin Console** > **Content** > **User Synonyms**
   - **Advanced Admin Console** > **System** > **Settings** > **Search** > **User Search** > **Synonyms**
2. Under **Synonyms**, type in a comma-separated list of synonyms for user names.
3. Click **Add Synonyms**.

After synonyms are added, the indexing is updated automatically and in ~30 seconds the newly added synonyms will be available in search.

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 199.
   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 Jive community 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 22: Properties of OpenSearch Engines

Option	Description
Name	The name of the OpenSearch engine.
Description	The description of the OpenSearch engine.
Descriptor URL	The URL of the descriptor XML file.
Icon URL	The URL of an icon representing the search engine. The Jive app displays this icon in the UI.
Search URL	The URL that is used to send the user queries.
Search Result Content Type	The content type in which the search engine's results are returned. Note that if this is a type that the application can parse, such as HTML (`text/html`), the results are displayed directly; if not, the application displays a link through which the user can separately search the engine site itself. • 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. • If you specify RSS or Atom as the content type, the application displays a new tab with the **Name** 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 **Show result preview** check box.
External Search URL	The link that is displayed to users through which they can separately search the engine site itself. The field is available only when RSS (`application/rss+xml`) or Atom (`application/rss+xml`) is selected in **Search Result Content Type**
Query Test Term	A term you use to test queries.
Maximum Number of Results	The maximum number of results displayed on the search page.
Username	The username if the search engine requires login credentials
Password	The password if the search engine requires login credentials

Option	Description
Enabled	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.
Show result preview	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.

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 reply to content or create 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.

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 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.

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 206.

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 Apach 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!inpu
 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 to 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

Set the email templates for additional languages so that users can 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 exactly 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 communities 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 in Jive 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 a 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 452.

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.

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.

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 172.

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 378.

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 127.

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 155.

Enabling abuse reporting

You can allows 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 363.

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 Moderation on page 440.

Enabling link moderation

You can required 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.

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 . Note that you must be a registered user to see this document.

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. Note that you must be a registered user to view this document.

Appended email content being included

You may notice that Jive includes content appended to your email, 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.

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 a timezone in their Preferences, the application server's timezone is used.

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.

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 is 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 the Jive UI. 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 to decide what to bundle 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. 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 by using the 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 by using the latest APIs, see the Jive Developer website at developer.jivesoftware.com.

Types of add-ons

External Storage Providers	These add-ons leverage options outside of Jive for storing and synchronizing binary files uploaded to a Jive place.
API Services	These add-ons bring external data into Jive or share Jive data with third-party integrations using the Jive API service.
Analytics Services	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.
Other Add-ons	These add-ons are the ones that cannot be placed to one of the previous categories.
Custom add-ons	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.

Fastpath: User interface: Your avatar > **Add-ons**

A user must have at least Manage System permissions to install add-ons.

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 packages you install are therefore provided as is. Use of third-party software is subject to their license or support terms, or both.

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
Install now	Select this to make the feature available to your entire community.
Preview	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. **Note:** If you choose **Preview**, we recommend that you create a secret group and test the add-on before making it available to everyone, as described in Letting community use your add-on on page 219.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

Fastpath: User interface: Your avatar > **Add-ons**

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 Jive Software determines an add-on is malicious, we may decide to ban it, and we will remove it from your environment as soon as possible.

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.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

Fastpath: User interface: Your avatar > **Add-ons**

Registry failure	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 `jiveURL`. You can try to re-register the service. If that doesn't resolve the alert, make sure the certificate and the `jiveURL` are correct.
Configuration failure	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.

Fastpath: User interface: Your avatar > **Add-ons**

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 135.

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 on the Jive Developer's Portal 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 218.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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 216.

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 (Getting Started with the Jive Node SDK on Worx) or manually (Getting Started > Building a Jive Add-On on Worx).
- 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 218).
- Let the community use your add-on (Letting community use your add-on on page 219).
- Publish your add-on to the Add-ons Registry (Publishing to the Add-ons Registry on page 219).
- Whenever you make new updates to your add-on, publish them to the Add-ons Registry (Pushing updates to Add-ons Registry on page 220).

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

   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.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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.

   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.

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.

Fastpath: User interface: Your avatar > **Add-ons**

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. For more information, see Getting started with the new Jive Support Portal on Worx.

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 213.

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 222.

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.

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.

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. 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.

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 225.

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.
- **XML**: Each event is converted into an XML file and put into the Jive server's binstore.
- **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.

Records Retention retained events

Records Retention tracks creations, update, and deletions of the user-generated content within Jive. Here you can find which activities are captured.

Content	Retained activities
Document	• Create • Edit • Rate • Like • Bookmark • Comment • Edit comment • Like comment • Share • Delete • Add recipients • Structured outcomes: mark, remove marking
Uploaded file	• Create • Edit • Rate • Like • Bookmark • Comment • Edit comment • Like comment • Share • Delete • Add recipients
Discussion	

Content	Retained activities
	• Create • Edit • Rate • Like • Bookmark • Share • Delete • Unmark question • Add recipients • Structured outcomes: Mark, Remove marking
Poll	• Create • Edit • Rate • Like • Bookmark • Edit comment • Repost • Like comment • Share • Delete
Status update	• Create • Like • Bookmark • Comment • Edit comment • Repost • Like comment • Share • Delete

Content	Retained activities
Blog	• Create • Edit
Blog Post	• Create • Edit • Like • Edit comment • Like comment • Drafts • Bookmark • Comment • Share • Delete • Structured outcomes: mark, remove marking
Bookmark (external)	• Create • Edit • Like comment • Edit comment • Bookmark • Comment • Share • Delete
Idea	• Create • Edit • Like comment • Comment • Bookmark • Share • Delete • Move

Content	Retained activities
Event	• Create • Edit • Delete • Rate, Add a rating comment • Comment: create, edit, delete • Like comment • Delete comment • Report abuse • Like • Share • Move • Attachments: add, remove • Edit tags (from view page) • Report abuse on comment • Bookmark: create, edit, remove • Invite others • User accepts invitation
Photo Album	• Create • Edit • Bookmark • Comment • Edit comment • Like comment • Share • Delete
Photo	

Content	Retained activities
	• Create • Edit • Like • Bookmark • Comment • Edit comment • Like comment • Share • Delete
Direct message	• Create • Reply • Add recipients
People	• Endorsements
Announcement	• Create • Edit
Share	• Create • Add recipients
Project	• Create • Edit
Space / Community	• Create • Edit • Invite
Video	

Content	Retained activities
	• Bookmark: create, edit, delete • Like • Report abuse • Rate, Add a rating comment • Comment: add, edit, delete • Share • Edit tags (from view page) • Report abuse on comment

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.

This feature is turned off by default. To enable bridging, contact Support.

Creating a bridge

To create a bridge from the current Jive community to another:

1. 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 24.

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 333.

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.

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 still 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	`https://<domain>/community/feeds/allcontent`
Tags	`https://<domain>/community/feeds/tags/<tag_name>`
Discussion messages	`https://<domain>/community/feeds/messages`
Popular discussions	`https://<domain>/community/feeds/popularthreads`
Discussions	`https://<domain>/community/feeds/threads`
Unanswered questions	`https://<domain>/community/feeds/unansweredthreads`
New blogs	`https://<domain>/blogs/feeds/blogs`
Blog tags	`https://<domain>/blogs/feeds/tags/<tag_name>`
Status updates	`https://<domain>/blogs/feeds/updates`
Documents	`https://<domain>/community/feeds/documents`
Statistics	`https://<domain>/community/feeds/stats`
Announcements	`https://<domain>/community/feeds/announcements`
Polls	`https://<domain>/community/feeds/polls`
Videos	`https://<domain>/community/feeds/video`
Ideas	`https://<domain>/community/feeds/idea`
Recent blog posts	`https://<domain>/blogs/feeds/posts`
Recent blog comments	`https://<domain>/blogs/feeds/comments`
Blog author	`https://<domain>/blogs/feeds/users/<user_name>`
Search	`https://<domain>/community/feeds/search?<search_string>`

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	https://<domain>/community/feeds/allcontent?communityid=<community_id>
Documents	https://<domain>/community/feeds/documents?communityid=<community_id>
Discussion messages	https://<domain>/community/feeds/messages?communityid=<community_id>
Discussion threads	https://<domain>/community/feeds/threads?communityid=<community_id>
Popular discussion threads	https://<domain>/community/feeds/popularthreads?communityid=<community_id>
Unanswered threads	https://<domain>/community/feeds/unansweredthreads?communityid=<community_id>
Recent blog posts	https://<domain>/blogs/feeds/posts?communityid=<community_id>
Tag	https://<domain>/community/feeds/tags/<tag_name>?communityid=<community_id>
Announcements	https://<domain>/community/feeds/announcements?communityid=<community_id>
Polls	https://<domain>/community/feeds/polls?communityid=<community_id>
Statistics	https://<domain>/community/feeds/stats?communityid=<community_id>

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	https://<domain>/blogs/<blog_name>/feeds/posts
Blog tags	https://<domain>/blogs/feeds/tags/<tag_name>
Recent comments	https://<domain>/blogs/<blog_name>/feeds/comments
Comments on a post	https://<domain>/blogs/<blog_name>/feeds/comments?blogPost=<post_id>

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	https://<domain>/community/feeds/document-comments/<document_id>
Version history	https://<domain>/community/feeds/document-history/<document_id>

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	https://<domain>/community/feeds/messages?rssUsername=<user_name>
Documents	https://<domain>/community/feeds/documents?rssUsername=<user_name>
Blog posts	https://<domain>/blogs/feeds/users/<user_name>
Updates	https://<domain>/people/<user_name>/feeds/updates

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.

Note: This is an optional feature available as a module. For more information, ask your Jive account representative.

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.

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.

Note: This security section only describes the Jive application. It does not describe the security features of third-party products that integrate with Jive.

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. A 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 about configuring login and password security, see Configuring Login settings on page 172, Configuring password settings and Configuring self-service user registration.

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.

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 101.

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 378.

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 363.
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.
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 155.

Encryption

HTTPS	HTTPS encryption is required for running Jive. Jive supports TLS 1.0, 1.1, and 1.2.

Encryption at rest	Encryption at rest is available to North American customers as an addition.

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 242.

Note: 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.

Enabling 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 should contact Support to enable the antivirus feature. For more information, see Getting started with the new Jive Support Portal on Worx. In addition, you need to create an Antivirus Management group (**People** > **Management** > **Create User Group**) and add users to it who must receive an Inbox notification whenever the antivirus feature finds malware. The user who attempted to upload a virus will be listed in the notification.

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

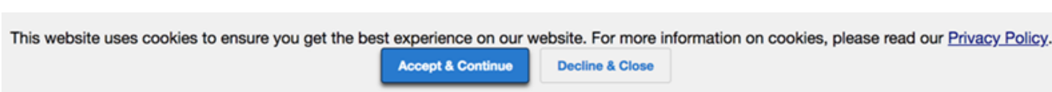
- Jive does not set third-party cookies as part of the core product offering. However, it is possible for you to configure the application so that third-party cookies are set. For example, you can configure the application to use a web-tracking tool such as Google Analytics, each of which may set a third-party cookie. For the list of the potentially added cookies, see Third-party cookies on page 249.
- Jive does not set the `domain` attribute of an HTTP cookie.
- 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.

Cookie banner

Jive provides a cookie banner that can be enabled to let users know that Jive uses cookies. All users must then acknowledge and accept cookies usage to continue using Jive. In case they decline it, their current Jive session ends, and they get redirected to a blank page.

Here is how the cookie banner looks like:



For more information, see Configuring Cookie Consent banner.

Jive cookies

Here you can find the list of cookies which Jive uses in communities.

Note: Except where noted, none of the following cookies contains user-identifiable information. This behavior meets European Union privacy laws.

Jive sets the following cookies:

anonymous	This cookie is used only by the Gamificatic the user is authenticated or not. • Possible values: `true` or `false` • Expiration: 1 year • Encryption: None • Example: `anonymous="false"`
BIGipServer	Cookies prefixed with `BIGipServer` help to e traffic, and contain encoded addresses of i These addresses are strictly internal, and connect to internal servers from the Interne of the cookie does not have any effect. For r these cookies, see the Overview of BIG-IP encoding article on the F5 Support site at port.f5.com/kb/en-us/solutions/public/6000
clickedFolder	This cookie is used in the Admin Console t closed status of the current folder as used portions of the Admin Console. • Possible values: String, `true`, or `false` • Expiration: At session end • Encryption: None • Example: `clickedFolder="true"`
highlightedTreeviewLink	This cookie is used in the Admin Console t folder as used in various tree-view portions • Possible values: Integer, the DOM ID of • Expiration: At session end • Encryption: None • Example: `highlightedTreeviewLink="23`
jive.oauth.token	This cookie contains Authentication Token • Possible values: String • Expiration: At session end • Encryption: None
jive.cookie.consent.accepted	This cookie is used to check if the cookie c already accepted. • Possible values: `true` or `false` • Expiration: 1 year • Encryption: None • Example: `jive.cookie.consent.accepte`

jive.user.lastvisited	This cookie is used to store the last time th • Possible values: UNIX timstamp • Expiration: 30 days • Encryption: None • Example: `CookieUtils.setCookie(reque "jive.user.lastvisited", Long.toStri`
jive.embeddedResponsive	This cookie is used to control view related • Possible values: `true` or `false` • Expiration: At session end • Encryption: None • Example: `jive.embeddedResponsive="tr`
jive.loginEventFired	This cookie is used when a registered user • Possible values: `true` or `false` • Expiration: At session end • Encryption: None • Example: `jive.loginEventFired="true"`
jive-cookie	This cookie is used in the Admin Console t an encrypted username and password whe between two sites. The information in the c with AES 256 encryption, and then Base64 • Possible values: String, Base64 encodec and password of the remote site • Expiration: At session end • Encryption: Yes • Example:`jive-cookie="YWFyb246MTMxNTU NmZjhhNjExZTdlMTcyMGZhYjVhNWNkNjI0Yg`
jive.explicit.login	This cookie is stored with value true if Jive Pr `quire.explicit.first.time.login` is enab • Possible values: `true` or `false` • Expiration: 1 days • Encryption: None • Example: `jive.explicit.login="true"`
jive.login.type	This cookie contains login-type which can default login or `saml` for SSO login. • Possible values: `form` or `saml` • Expiration: 30 days

- Encryption: None
- Example: `jive.login.type="saml"`

jive.login.ts

This cookie stores the time stamp of the us

- Possible values: Unix time in ms
- Expiration: At session end
- Encryption: None
- Example: `1387387736841`

jive.tipGroups.skipped

This cookie stores the list of Skipped Tip G

- Possible values: Integers with "|" delimin
- Expiration: At session end
- Encryption: None
- Example: `jive.tipGroups.skipped="123`

jive.mobile.redirect

This cookie retains the user selection for o Jive Mobile app or the Jive Daily: Intranet c using a mobile device. Currently supported

- Possible values: `web`, `native`
- Expiration: 1 month
- Encryption: None

jive.saml.passive.tried

This cookie is used to mark when SAML pa has already been attempted.

- Possible values: `true`
- Expiration: 3600 seconds (one hour).
- Encryption: None
- Example: `jive.saml.passive.tried="tr`

jive.security.context

This cookie is the authentication context fo

- Possible values: The user's encrypted se
- Expiration: 30 minutes unless refreshed. servlet container session timeout.
- Encryption: AES 256
- Example: `jive.security.context="SdRw BLFy3Q==.MzA3OQ=="`

jive.server.info

This cookie is used on the front-end in con Distribution Networks (CDN) to associate t server (also known as *session affinity*).

- Possible values: String, a combination of `serverPort`, `contextPath`, `localName`, `loc`
- Expiration: At session end

	• Encryption: None • Example: `jive.server.info="serverNam ple.com:serverPort=443:contextPath= host.localdomain:localPort=9001:loca`
jiveTimeZoneID	This cookie is used on the front-end for gu 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 con Distribution Networks (CDN) to denote the request. • Possible values: String, true if the curren from a browser where the user is logged • Expiration: At session end • Encryption: None • Example: `jive.user.loggedin="true"`
jive_wysiwygtext_height	This cookie is used on the front-end to per editor window across sessions. • Possible values: Integer, the height in pi the user chooses to expand the editor w • Expiration: 1 year • Example: `jive_wysiwygtext_height="50`
X-JCAPI-Token	This cookie is used with all application and POST, PUT calls for CSRF protection. • Possible values: String • Expiration: At session end • Encryption: None • Example: `CookieUtils.setCookie(req, r StringUtils.randomString(8), -1);`
X_JAPP_INSTANCE	This cookie is used to preview the site with template. • Expiration: 2 days • Encryption: Yes
JSESSIONID	This cookie is used on the front-end and th identify a session. It is part of the Java Se

	described in http://www.oracle.com/technet va/javaee/servlet/index.html. • Possible values: String, the unique toker Tomcat • Expiration: At session end • Encryption: None • Example: `JSESSION-ID="1315409220832msB9E3A98AA1F2005E6`
linkedin_oauth_	This cookie is used to communicate and auth
NITRO_SESSION_*	This cookie is used to display points from I • Possible values: String • Expiration: At session end • Encryption: None • Example: `NitroCookies.createJSCookie cp.apiKey + "_" + cp.userId, data.Nit 1/72);`
noredirect	This cookie used to control the redirect to redirection is enabled. • Possible values: `true` or `false` • Expiration: At session end • Encryption: None • Example: `noredirect="true"`
nps_currentUserKey	This cookie contains current login user info • Possible values: String, current login use following format: `nps_<userId>_<product` • Expiration: At session end • Encryption: None • Example: `nps_currentUserKey="nps_200`
nps_maxThreshold	This cookie holds Maximum Threshold valu • Possible values: Integer • Expiration: At session end • Encryption: None • Example: `nps_maxThreshold="300"`
place_info	This cookie is used to temporarily store the information when a user is configuring a til a third-party system, such as Google Docs

	Save in the place template editing interfac destroyed. • Expiration: After place template changes • Encryption: None • Example: `place_info="placetype%3A700`
skin.palette.preview	This cookie is used to preview the site with template. • Possible values: ID (long value) of the te • Expiration: 30 days • Encryption: None • Example: `skin.palette.preview="1001"`
st2	This cookie is related to an encrypted secu to identify whether the call is made from ifr • Expiration: At session end • Encryption: Yes
SPRING_SECURITY_REMEMBER_ME_COOKIE	This cookie is used on the front-end as par authentication process to denote whether c have their credentials persist across sessio Spring Security specification, as described source.org/spring-security/site/docs/3.0.x/r me.html. • Possible values: String, the Base64 enco expiration time combined with an MD5 hex password, expiration time, and private ke • Expiration: Defaults to 14 days • Encryption: None. This is an MD5 hex ha • Example: `SPRING_SECURITY_REMEMBER_ME MxNTU4MjUzNTI3MDoyZDUyODNmZjhhNjExZT jI0Yg"`
termsAndConditionsAcceptanceRequired	This cookie indicates the user needs to acc Conditions. • Possible values: `true` or `false` • Expiration: At session end • Encryption: None • Example: `termsAndConditionsAcceptanc`
<userid>__action	This cookie holds the value of user action • Possible values: `never` or `shared` • Expiration: Never until manually cleared

- Encryption: None
- Example: `<userid>__action="Never"`

<userid>_usagetime

This cookie holds user usage time in secon NPS handling.

- Possible values: Integer
- Expiration: Never until manually cleared.
- Encryption: None
- Example: `<userid>_usagetime="120"`

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.

F5 load balancer

The F5 load balancer used by Jive Software sets the following cookies on hosted and Cloud instances. Note that the cookie names are dynamic, based on the name of F5's Big IP pool. Yours may be named differently.

- BCSI-CS-f89c73c53b0f638a
- BIGipServerm2s4c5-3-pool

For more information about how F5 uses cookies, see https://www.f5.com/services/resources/white-papers/cookies-sessions-and-persistence.

Jive Business Analytics (powered by Totango)

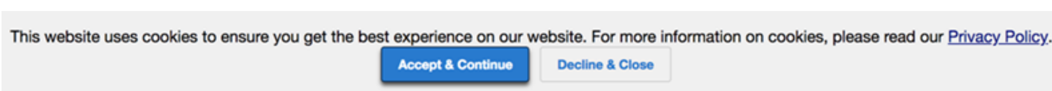
The following administrative cookies are added by the Jive Business Analytics service (an optional module) to the end-user browser to manage the state of the collection library. If you do not have Jive Business Analytics for your instance, these cookies will not be set.

totango.org_attributes	The list of attributes taken from the logged-in user profile, such as location and department.
totango.user_attributes	This cookie is empty.
totango.org_name	The username of the current user that is taken from the user's profile.
totango.user	The username of the current user that is taken from the user's profile.
totango.org_dn	This cookie is empty.
totango.org_ofid	This cookie is empty. It is used to optimize the events sent for collection to the Analytics service.
totango.heartbeat.last_ts	Time stamp (Unix time) of the last event collected.
totango.heartbeat.last_mod-ule	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 cookies usage 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 242.

To enable and configure cookie banner settings:

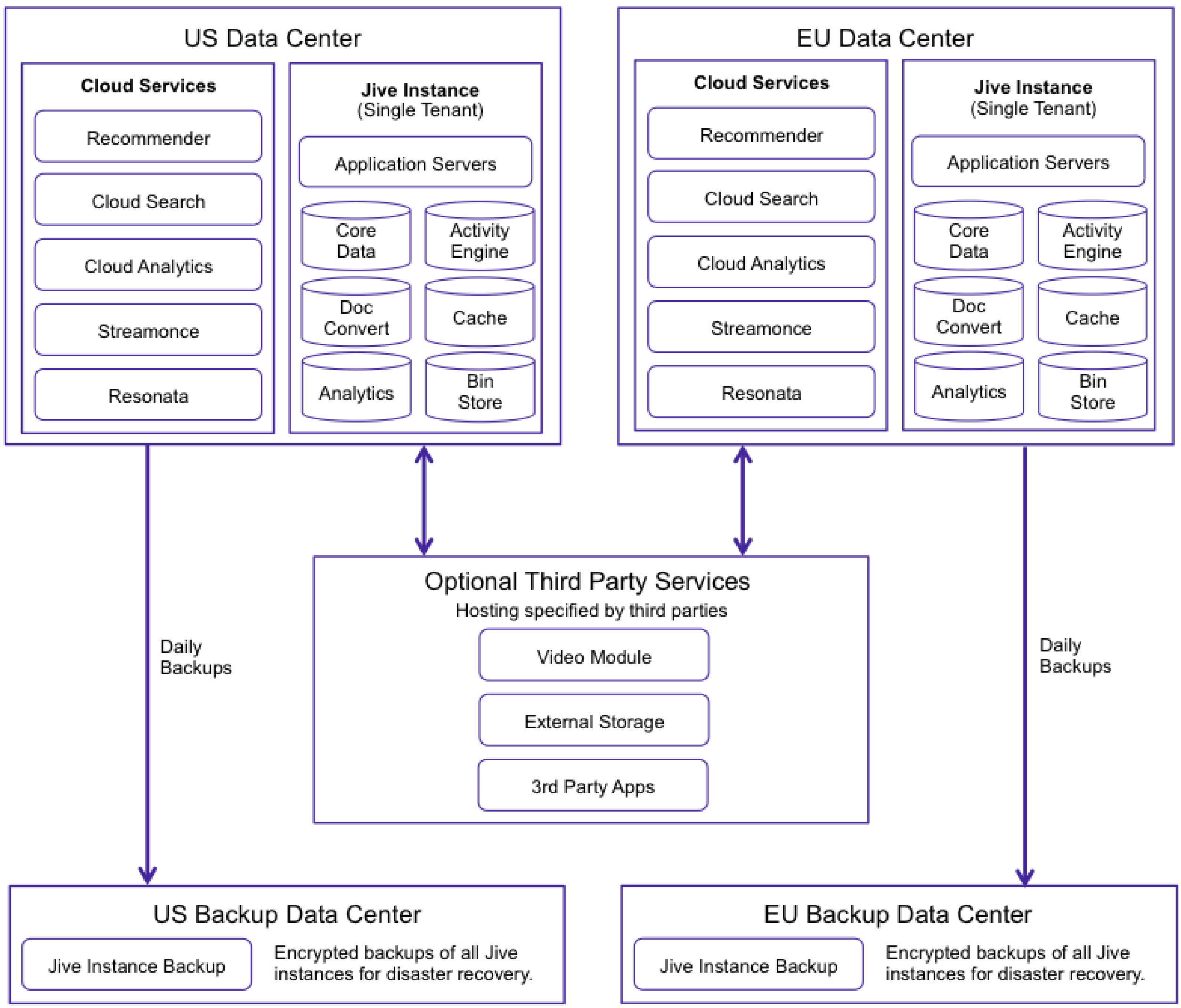
1. In the Admin Console, go to **People** > **Settings** > **Cookie Consent Banner** .
2. To enable the Cookie Consent banner, select **Enabled**.
3. If required, in the **Privacy Policy URL**, specify the privacy policy page of your community.
4. Click **Save**.

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.

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 on 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 recom-mendation	Description
Configure user login security	Login security can include throttling, captcha, and password strength requirements. For implementation details, see Configuring Login settings on page 172 and Configuring self-service user registration.
Enable SSO	An SSO on 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 re-quirement. For implementation details, see Single Sign-On, or, if you need an SSO customization, contact your Jive Software account representative.
IP whitelisting	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 Support. For more information, see Getting started with the new Jive Support Portal on Worx.

Security recommendation	Description
Prevent spam in your community	Everyone hates spam, and it can also present security risks. Limit it in your community as much as you can. For implementation details, see the following: • Spam prevention 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. • Best Practices for Spam Management on Worx. If you're a customer, we recommend joining this private group for useful community management content from Jive and fellow customers.
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 Managing System Administration permissions on page 384 section.
Enable anti-virus checking	Your community automatically include a module that checks files for viruses before they can be uploaded to the community. For implementation details, see Enabling antivirus feature on page 241.
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. **Note:** This is an optional feature available as a module. For more information, ask your Jive account representative.

3

Managing a community

In this section you can find tasks related to day-to-day community management.

For details, see the following topics:

- Managing places and pages
- Managing permissions
- Managing user accounts and user groups
- Moderation
- Getting information about performance

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.

To make a place easier to search, you can use the search term in the title, description, and tag fields as many times as possible, with as few other words as possible.

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 353 and Creating new spaces from the Admin Console on page 358.

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.

For more information, see Using content and Types of groups in the User Guide.

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

Creating community structure

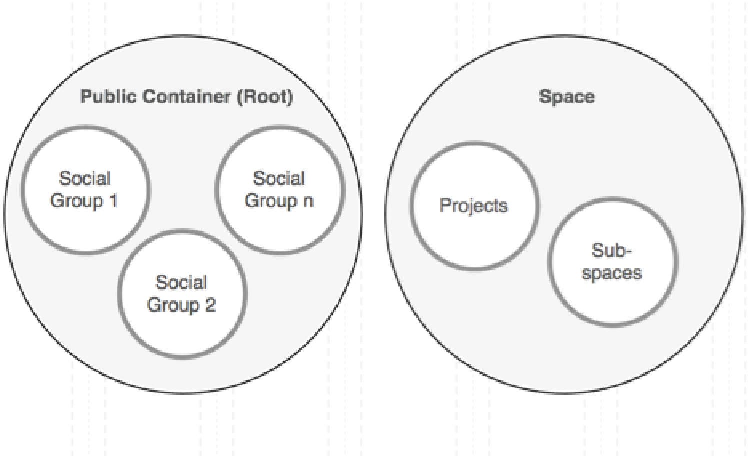
Creating a structure for content is one of the most important things you do to get your community started. Because people post content in various places, the places you create should help your users intuitively understand where to post (and find) content.

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 353 and Creating new spaces from the Admin Console on page 358.

Designing places

Here you can find general information about designing and managing places, including special place pages.

Understanding pages in places

If you are a place owner, 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 77.
- 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 and Tile reference.

Overview pages with widgets

Important: We do not recommend that you use widgets and widgetized Overview pages in your community.

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.

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**.

Note: You must have widgetized Overview pages enabled in your community. To enable widgets in your community, you need to contact Support. For more information, see Getting started with the new Jive Support Portal on Worx.

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 71.
- 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 47.
- The **Home page** of the entire community, if it is enabled. For more information, see Designing Home page of your community on page 71.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

- The **Your View page**, if it is enabled in your community. For more information, see Disabling or enabling Your View feature on page 121.
- The landing page of a place: an **Activity page** or an **Overview page** (place widgets must be enabled). For more information, see Place Templates for designing activity and custom pages for places on page 261 and Designing Overview pages for places on page 333.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

- 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 262.

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 and Adding Overview page.

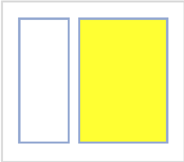
The following table shows where you can use tiles, and where you can use widgets.

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

The number of tiles on a page

When planning Activity or custom pages, take heed of the number of tiles on the page. A large number of tiles may degenerate Jive performance, including but not limited to page loading times and content responsiveness. This also applies to the user's Your View pages.

This is especially applicable to wide and custom tiles that are usually heavily impacting the performance. With this in mind, Jive has a limit on tiles per page:

- Wide tiles that take 2/3 of the page width  are limited to no more than 3 tiles per page by default.
- Custom tiles (listed under the **External Add-ons** category when you add a new tile) are limited to no more than 5 tiles per page by default.

Note: If required, the maximum number of wide tiles per Activity page can be increased up to five tiles. To increase the limit for your community, you need to file a support ticket with Support.

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 **Gear icon** > **Setting** .
2. In the **Edit place** dialog box, click **Cancel**.
3. To change the place image, click the camera icon  on the place image, then browse and open an image.

   The image is uploaded and set as the place image.
4. To change the place banner, do the following:
   a) Click **Edit banner**.
   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.

5. Click **Save** to save the page changes.

The place opens for viewing with the updated banner and image.

Place Templates for 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.

Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

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 **Create a 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.

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 5.

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** .

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 **Gear icon** > **Edit activity page** to open the Activity page for editing.

   Alternatively, you can click the **gear icon** > **Settings** or click the **info icon** > **Edit** to open the **Edit Group** page, and then click **OK** to edit the Activity page.
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 270.
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 and Tile reference.

Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

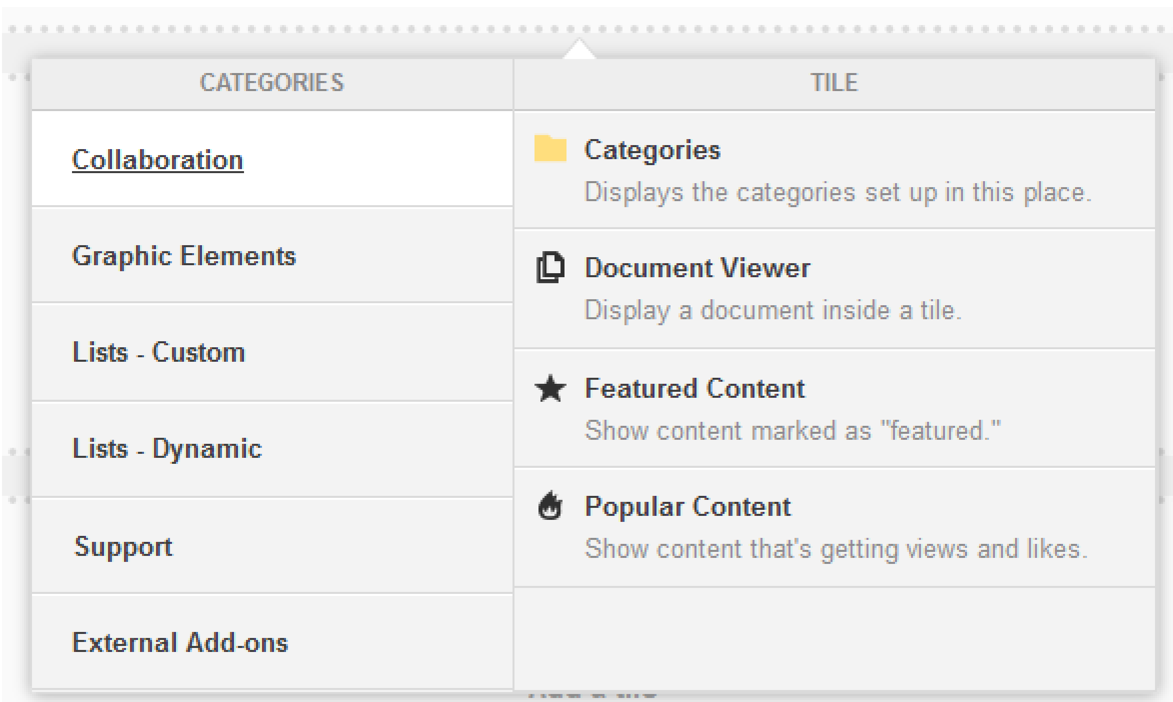
To add tiles to the place Activity page:

1. In your place, click the **Gear icon** > **Edit activity page** to open the Activity page for editing.

Alternatively, you can click the **gear icon** > **Settings** or click the **info icon** > **Edit** to open the **Edit Group** page, and then click **OK** to edit the Activity page.

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 **Gear icon** > **Edit activity page** to open the Activity page for editing.

   Alternatively, you can click the **gear icon** > **Settings** or click the **info icon** > **Edit** to open the **Edit Group** page, and then click **OK** to edit the Activity page.
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 and Tile reference.

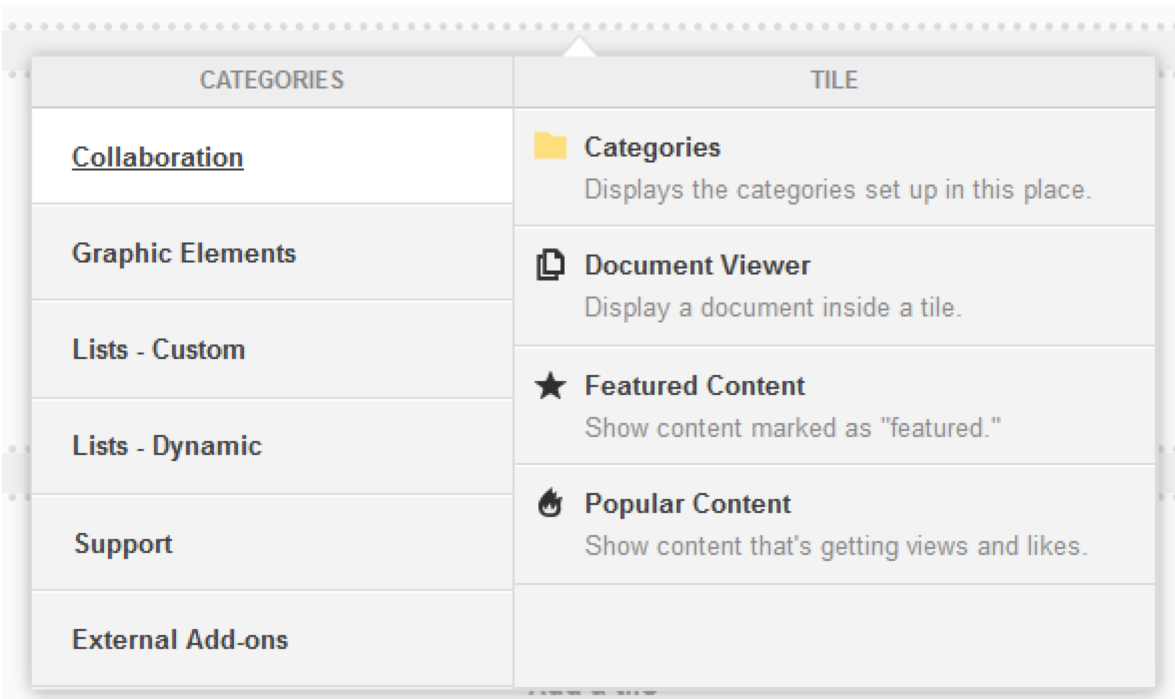
Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

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, rename, or hide links to pages in the navigation bar of a place by configuring its page navigation.

You need to be able to edit a place to manage place navigation.

To reorder, edit or hide links in the place navigation menu:

1. In the place, click the **gear icon** > **Navigation** to open the **Configure Navigation** dialog box.
2. To reorder pages, drag and drop the page lines to where you want to see them on the place navigation menu.

   Note: The first page on the list is the landing page of the place.

3. To hide pages, click for all pages you want to hide from the place.
4. To show hidden pages, click for all pages you want to show in the place.
5. To rename a custom page, click , enter a new page title, and then click .

   You can only edit custom page names and not names of other pages like Activity or Overview.
6. Click **Apply** 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** > **Gear icon** > **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 **Gear icon** > **Edit activity page** to open the Activity page for editing.

   Alternatively, you can click the **gear icon** > **Settings** or click the **info icon** > **Edit** to open the **Edit Group** page, and then click **OK** to edit the Activity page.

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 265.

3. Click **Save** to save them to the current template.

   Note: Custom pages you add are not saved within the template.

4. Click **Manage** > **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.

A new global template is added to the Community Templates list. For more information, see Theming community on page 24.

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 **Gear icon** > **Settings** , and then click **Cancel** in the **Edit space** dialog box to enter the edit view of the place.
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 270) 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 267. For more information about data tiles and the information they're based on, see Place tile reference.

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	Leaderboard 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 Leaderboard 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 Leaderboard 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	Leaderboard 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	Leaderboard Key Dates	Documents Status Updates (in groups only)	Public	event, stream

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 Leaderboard 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 Leaderboard 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	Leaderboard 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	Leaderboard Featured Content Popular Content	Blogs Documents Status Updates (in groups only)	Public	success_stories, win

Other place template reference

Other place template category contains the Pre-hire Collaboration for externally-facing communities.

Place Template	Tiles	Features	Default Type	Default Tags
Pre-hire Collaboration	Featured People Key Content and Places Helpful Links Action Items Key Dates	Discussions Polls Blogs Documents Ideas Projects Videos Events Status Updates	Private (Unlisted) and Externally Accessible	pre-hire

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 Leaderboard 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
R&D Planning	Action Items Popular Content Leaderboard 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 Leaderboard Key Content and Places Gauge	Documents Discussions Status Updates (in groups only) Projects	Private	request_for_proposal, rfp
Competition	Featured People Leaderboard 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	—

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.

Tiles support in

The tiles you add to pages are displayed in the 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.

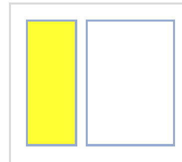
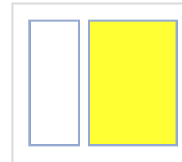
Note: This page is not supported by Jive Daily: Intranet on the go.

Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

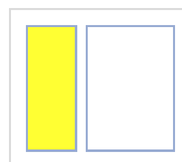
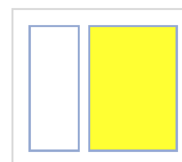
Collaboration tiles

Tile	Description	Dependencies	Narrow column	Wide 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		

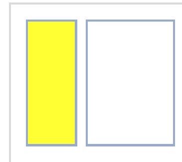
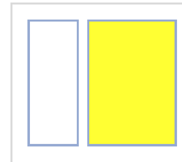
Graphic Elements tiles

Tile	Description	Dependencies	 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

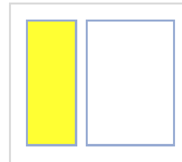
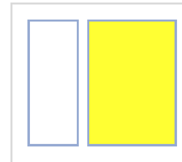
Tile	Description	Dependencies	 Narrow column	 Wide column
Expandable Sections	Shows links to community content under collapsible headings	Content added manually		
Featured People	Builds a list of important people for your place	Content added manually		
Helpful Links	Builds a list of key links for quick 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
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		
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 **Use this view in a tile** 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		

* Content items can be excluded from the **Trending Content** tile.

Support tiles

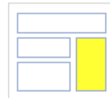
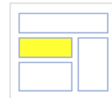
Tile	Description	Dependencies	 Narrow column	 Wide column
Helpful Links	Build a list of useful links for quick reference. Links can be internal to your community or external URLs.	Content added manually		
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click **Use this view in a tile** at the bottom of any People, Places, or Content browsing result		

News page tile reference

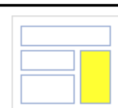
Here is a complete list of the tiles available on the News page of your community.

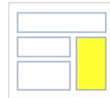
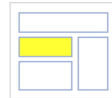
Tiles are split by category, similar to tiles arrangement in the UI. Some tiles can be available in more than one category.

Collaboration tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 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				

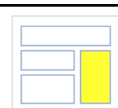
Graphic Elements tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
Hero Image	Provides a key image with a link and call to action as a header for your News page	Content added manually				
Banner	Adds a series of linked images with text to promote important content	Content added manually				

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Carousel	Links a rotat-ing image carousel to crucialdestina-tions	Content added manually				
Create an HTML Tile	Adds HTML	Content added manually				*
Image Gallery	Creates a slideshow with images and captions	Content added manually				
Video (Exter-nal)	Shows a manu-ally 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: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

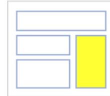
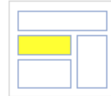
Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Expand-able Sec-tions	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important peo-ple for your place	Content added manually				

Tile	Description	Dependencies	Narrow column	Widecol-umn	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				

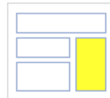
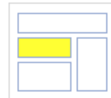
Dynamic List tiles

Tile	Description	Dependencies	Narrow column	Widecol-umn	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				
Leaderboard	Shows the top point earners in the community.	Internally-facing communities only				
News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on content from the News streams				

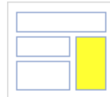
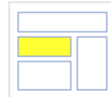
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
Similar Places	Shows places with the same tags	Relies on content being tagged				
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click **Use this view in a tile** at 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*	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				

* Content items can be excluded from the **Trending Content** tile.

Support tiles

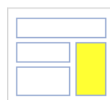
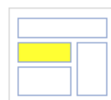
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
Ask a Question	Finds a previously asked or answered question, or gives the ability to ask a new one	Relies on content query. Configure to select content types and places to query				
Helpful Links	Builds a list 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 **Use this view in a tile** 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 cus-tom user expe-rience by in-serting HTML content into a tile for your place	Content added manually				*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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 peo-ple 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 304. 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.

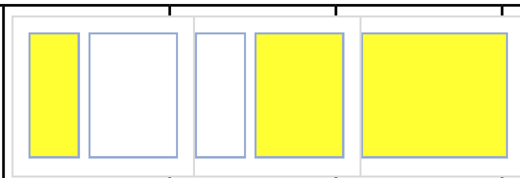
Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

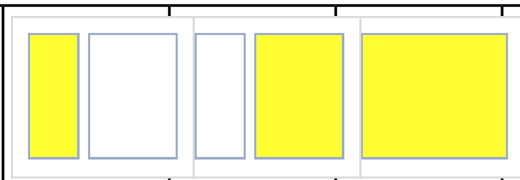
Your tiles

Tile	Description	Dependencies
Your Custom Tile Name	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 Creating Custom tiles on page 304.

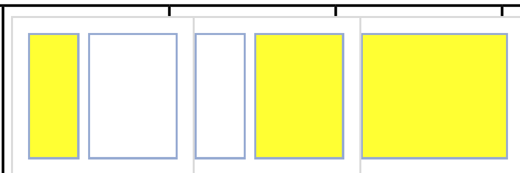
These tiles are not supported by Jive Daily: Intranet on the go.

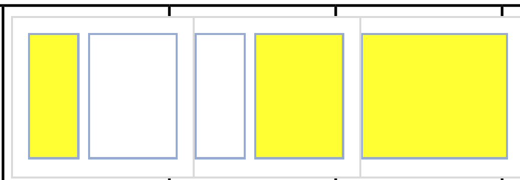
Collaboration tiles

Tile	Description	Dependencies	 Narrow column	Widecol-umn	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	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	Custom page only	
Finalized Content	Shows content that has been marked Final	Relies on content being marked as Final				
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				

Tile	Description	Dependencies	 Narrow column	Widecolumn	Jumbo column	Jive Daily support
Popular Content	Shows content that's getting views and likes	Relies on content getting viewed and liked		Custom page only	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

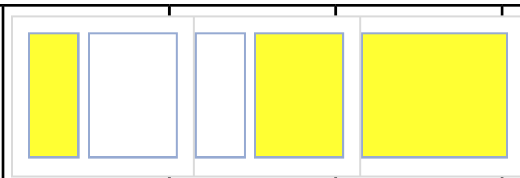
Tile	Description	Dependencies	 Narrow column	Widecolumn	Jumbo column	Jive Daily support
Banner	Adds a series of linked images (up to 5) with text to promoteimportant content	Content added manually			Custom page only	
Carousel	Link a rotating image carousel to crucialdestinations	Content added manually			Custom page only	



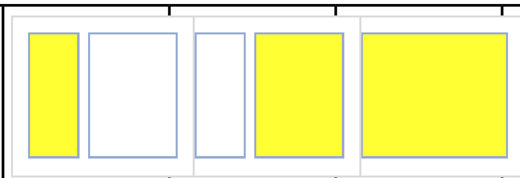
Tile	Description	Dependencies	Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually			Custom page only	*
Gauge	Shows status on a gauge	Set manually				
Image Gallery	Creates a slideshow with images and captions	Content added manually			Custom page only	
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually			Custom page only	
Video (Featured)	Display a video from anywhere on the Internet	Content added manually		Custom page only	Custom page only	

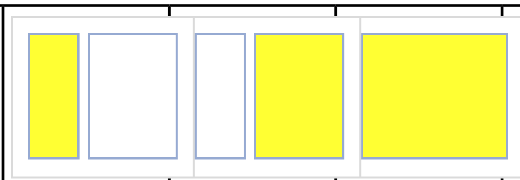
* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

Custom List tiles

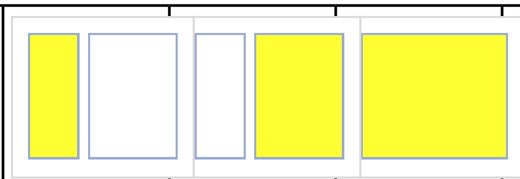
Tile	Description	Dependencies	 Narrow column	Widecolumn	Jumbo column	Jive Daily support
Categories	Display content in selected categories	Relies on categories configured in the current place		Custom page only	Custom page only	
Content Sets	Shows community content inside a tile, in a browse sequence you design. For more information, see Using Content sets and Content Sets tiles on page 311	Content added manually		Custom page only	Custom page only	
Expandable Sections	Shows links to community content under collapsible headings	Content added manually			Custom page only	
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	Widecolumn	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 questions that include a reply marked as Correct Answer or Assumed Answered		Custom page only	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	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			Custom page only	



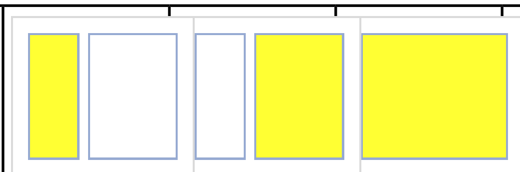
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Leaderboard	Shows frequentcontributors to the place	Populated when activity happens in the place. Note that this tile uses the same information as the status levels in your community				
Popular Content	Shows content that is getting views and likes	Relies on content getting viewed and liked		Custom page only	Custom page only	
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 **Use this view in a tile** at the bottom of any People, Places, or Content browsing result			Custom page only	
Tagged Content	Displays content that matchesspecific tags	Relies on content being tagged				



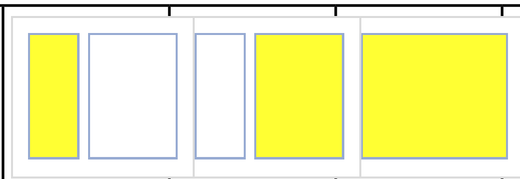
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Trending Content*	Displays content with the most views and interactions	Relies on views, likes, and shares		Activity page only		Activity page only
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on questions that do not yet have a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	

* Content items can be excluded from the **Trending Content** tile.

Support tiles

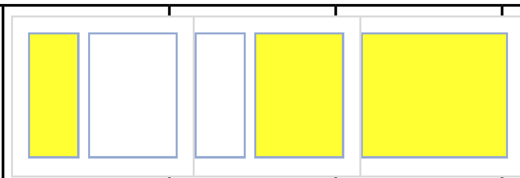


Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Answered Questions	Displays a list of questions that have been answered in the place	Relies on questions that include a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	
Ask a Question	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			Custom page only	



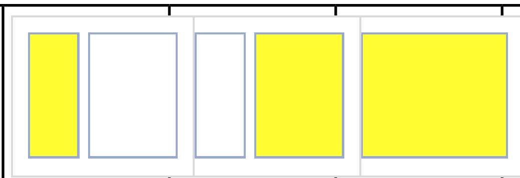
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Helpful Links	Build a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click **Use this view in a tile** at the bottom of any People, Places, or Content browsing result			Custom page only	
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on questions that do not yet have a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	

External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	Widecolumn	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 page only	*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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			Custom page only	
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			Custom page only	

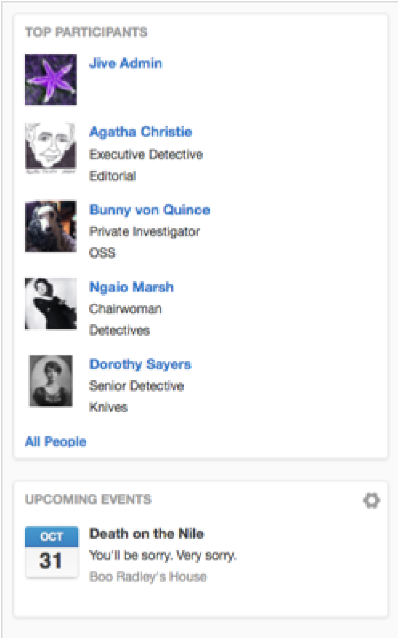
Using tiles

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.

Two useful tiles that you can choose are the Top Participants and Upcoming Events tiles:

Figure 10: 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.

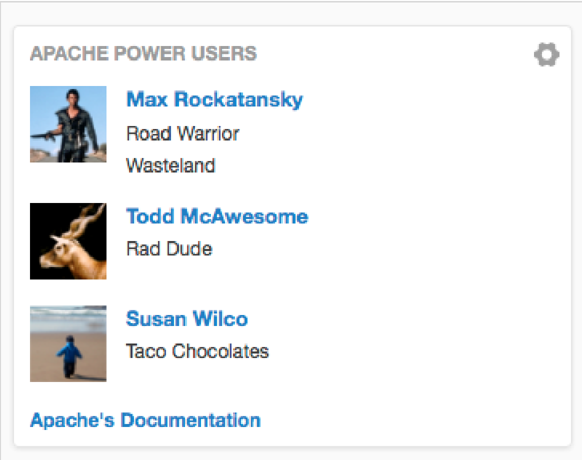
- You can use a tile as is or customize it to display specific information. For more information, see Place Templates for designing activity and custom pages for places on page 261.

Creating Custom tiles

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:

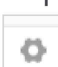
Figure 11: Example of a custom tile



To create a custom tile, first you add a tile, and then configure it to include the links you want to feature:

1. In the place, open the page where you want to add a tile for editing by clicking the **Gear icon** > **Edit <page title>** .
2. In a narrow column, click **Add a tile**.
3. Under Categories, select **Custom Tiles**.
4. Choose the kind of tile you want:

Options	Description
Create a Content or Place tile	Use this tile if you want to create links to specific content items and/or places in your community.
Create a People tile	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.

5. In **Title**, enter the tile a name.

   The tile name should describe the tile's content, such as Accounting Superstars or Engineering Docs.

6. Click **Add Content or Place** to add the links to the content, people, or places that you want this tile to display.
7. 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**.

8. Select the security type for this tile. The available options may differ depending on your permissions:

Options	Description
Lock tile contents	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. 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.
Save as global tile for others in the community to use	Only users with Manage Community permissions see this option. All place owners in the community are able to use this tile. If the tile is locked, all place owners are able to use the tile but not edit it. 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.

9. 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 an mobile devices, depends on the community and tile settings.

For the whole community, HTML tiles are available by default. If you need to change the settings, you should contact Jive support.

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 307.

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`.

Creating custom HTML tiles

You add a tile and then add your custom code to it to create your custom tile.

For more information about Custom HTML tiles, see Overview of Custom HTML tiles on page 306.

To create a Custom HTML tiles:

1. In the place, open the page where you want to add a tile for editing by clicking the **Gear icon** > **Edit <page title>** .
2. Click **Add a tile**.
3. Under **Categories**, select **Graphic Elements**.
4. Under **Tiles**, select **Create an HTML tile**.
5. In the **Your HTML** dialog box, provide your HTML code.
6. To upload files for the tile, click **Manage Files** and upload the necessary files.
7. 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.

8. If the tile responsive and the HTML code is mobile-friendly, under **Mobile Friendly** select **Yes**.
9. If the tile is not responsive, under **Mobile Friendly** select **No**.
10. Click **Preview** to see how the tile looks like.
11. Click **Submit** to enter the tile to the page.
12. Click **Save** to save the page changes.

The HTML tile is added to the page.

Creating Super List tile

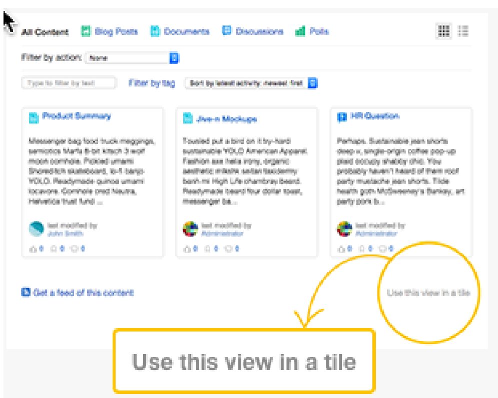
The Super List tile displays a filtered list of content, people, or places. You create the filter link, and then paste it into your Super List tile to get the results.

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. In the place, open the page where you want to add a tile for editing by clicking the **Gear icon** > **Edit <page title>** .
5. In either a wide or narrow tile, click **Add a tile**.
6. Select **Lists - Dynamic** > **Super List** .
7. Paste the link into the **Paste filter link here** box.
8. If you pasted a link to filtered content, choose one of the following options:

Options	Description
Basic list	Use this view to show title, author, and post date
Detailed list	Use this view to show title, snippet of content, and, if available, number of comments, replies, likes, and views.

Options	Description
Rich Preview	Use this view to show original content author avatar and name, post date, content icon and title, a thumbnail of an image (if available), snippet of content

9. You can change the title and the number of items to display.
10. Click **Apply** to save the tile settings.
11. 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, you can which place should be searched, specify the default content type you want them to search, and specify the default location for the users to create their questions if they find no results.

To add and configure an Ask a Question tile:

1. In the place, open the page where you want to add a tile for editing by clicking the **Gear icon** > **Edit <page title>** .
2. In either a wide or narrow column, click **Add a tile**.
3. Select **Support** > **Ask a Question** .
4. Optionally, change the title, default text in the search field, and the **Submit** button text.
5. Specify the place where Jive should search for the question, or select **All places**.

   You could limit their search to the place where the tile lives, or open it up to a community search.
6. In **Number of type-ahead search results**, enter a number from 1 to 25 that represents how many type-ahead results you want users to see.

   The user can click **See all results** to open the filtered search page.
7. If you want to restrict the results to specific content types, select them.

   For example, this is useful if you only want to show questions or discussion related to the search.
8. Under **Post Questions to**, select the place where the user's question should be posted, or select **Let the user choose the place**.

   You might want to guide the user to use a specific place, but they can always change this if they need to.

9. Click **Save Properties** to the tile settings.
10. 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. In the place, open the page where you want to add a tile for editing by clicking the **Gear icon** > **Edit <page title>** .
2. Click **Add a tile**.
3. Under **Lists - Dynamic**, select either the **Answered Questions** or **Unanswered Questions** tile.
4. 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.

5. In **Sort by**, select whether you want the **newest** or **oldest** questions to display first in the list.
6. 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.

7. When you're finished configuring the tile, click **Save**.
8. 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 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.

Tiles support in

The tiles you add to pages are displayed in the 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

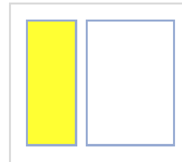
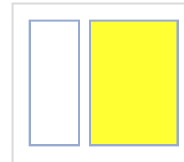
Here's a list of the tiles available on a Your View page.

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

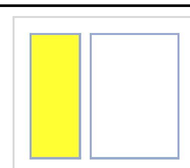
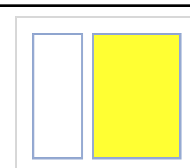
Note: This page is not supported by Jive Daily: Intranet on the go.

Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

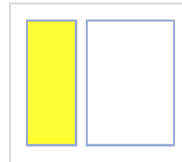
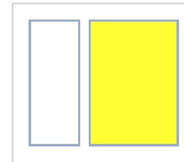
Collaboration tiles

Tile	Description	Dependencies	 Narrow column	 Wide 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		

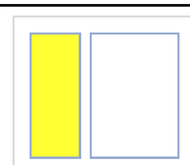
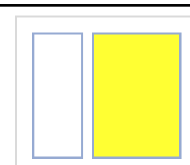
Graphic Elements tiles

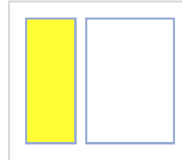
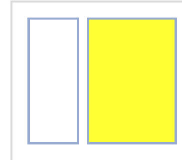
Tile	Description	Dependencies	 Narrow column	 Wide column
Gauge	Shows status on a gauge	Set manually		
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually		

Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Wide column
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		

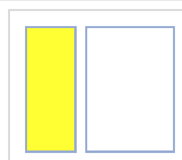
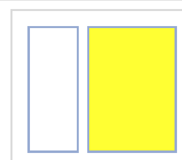
Dynamic List tiles

Tile	Description	Dependencies	 Narrow column	 Wide column
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		
Recently Viewed	Shows the people, places, and content you viewed recently	Relies on an algorithm		

Tile	Description	Dependencies	 **Narrow column**	 **Wide column**
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 **Use this view in a tile** 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		

[*] Content items can be excluded from the **Trending Content** tile.

Support tiles

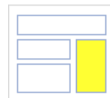
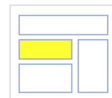
Tile	Description	Dependencies	 **Narrow column**	 **Wide column**
Helpful Links	Build a list of useful links for quick reference. Links can be internal to your community or external URLs.	Content added manually		
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click **Use this view in a tile** at the bottom of any People, Places, or Content browsing result		

News page tile reference

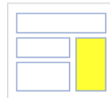
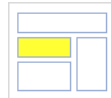
Here is a complete list of the tiles available on the News page of your community.

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

Collaboration tiles

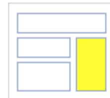
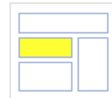
Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Document Viewer	Shows a full preview of a document you choose to display	Content added manually				
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external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

Graphic Elements tiles

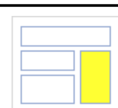
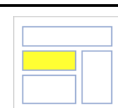
Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Hero Im-age	Provides a key image with a link and call to action as a header for your News page	Content added manually				
Banner	Adds a series of linked im-ages with text to promote im-portant con-tent	Content added manually				
Carousel	Links a rotat-ing image carousel to crucialdestina-tions	Content added manually				
Create an HTML Tile	Adds HTML	Content added manually				*
Image Gallery	Creates a slideshow with images and captions	Content added manually				
Video (Exter-nal)	Shows a manu-ally selected video from an external, non-community source	Content added manually				

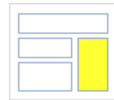
* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

Custom List tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Expand-able Sec-tions	Shows links to community content under collapsible headings	Content added manually				
Featured People	Builds a list of important peo-ple for your place	Content added manually				
Helpful Links	Builds a list of key links for quick refer-ence. Links can be internal to your commu-nity or external URLs	Content added manually				
Key Con-tent and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually				

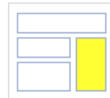
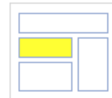
Dynamic List tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Dai-ly sup-port
Featured Quest	Shows the us-er's progress as they com-plete 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				

Tile	Description	Dependencies	 Narrow column	 Widecolumn	 Jumbo column	Jive Daily support
Leaderboard	Shows the top point earners in the community.	Internally-facing communities only				
News	Displays news headlines from the community that are pulled in from each of the News streams	Relies on content from the News streams				
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 **Use this view in a tile** 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*	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				

* Content items can be excluded from the **Trending Content** tile.

Support tiles

Tile	Description	Dependencies	 Narrow column	 Widecol-umn	 Jumbo column	Jive Daily support
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 **Use this view in a tile** at the bottom of any People, Places, or Content browsing result				

External Add-Ons tiles

Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually				*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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 304. 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.

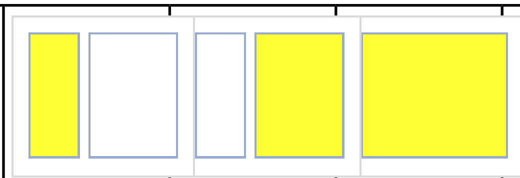
Note: The total number of wide and custom tiles you can add to any Activity, Custom page or Your View is limited. For more information, see Planning customized community pages.

Your tiles

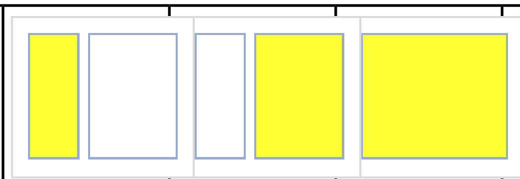
Tile	Description	Dependencies
Your Custom Tile Name	Any custom tiles you have created are listed here	You must first create a New Content, People, or Places tile to see the Your Tiles option under Categories. For more information, see Creating Custom tiles on page 304.

These tiles are not supported by Jive Daily: Intranet on the go.

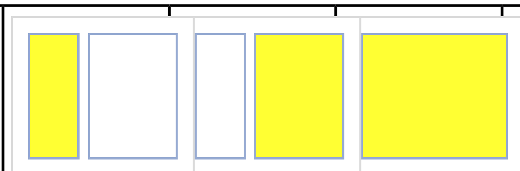
Collaboration tiles

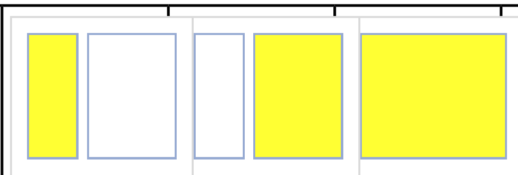


Tile	Description	Dependencies	Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Action Items	Tracks the content that needs follow-up actions	Relies on content being marked as Needs Action				
Categories	Displays content in selected categories	Relies on categories configured in the current place		Custom page only	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	Custom page only	
Finalized Content	Shows content that has been marked Final	Relies on content being marked as Final				
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				

Tile	Description	Dependencies	 Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Popular Content	Shows content that's getting views and likes	Relies on content getting viewed and liked		Custom page only	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

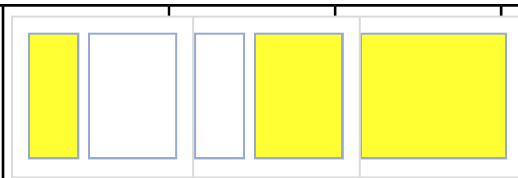
Tile	Description	Dependencies	 Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Banner	Adds a series of linked images (up to 5) with text to promoteimportant content	Content added manually			Custom page only	
Carousel	Link a rotating image carousel to crucialdestinations	Content added manually			Custom page only	



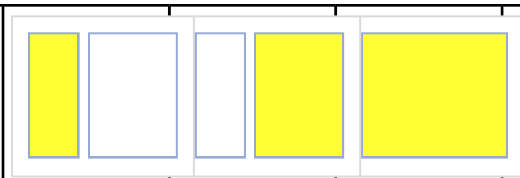
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Create an HTML Tile	Creates a custom user experience by inserting HTML content into a tile for your place	Content added manually			Custom page only	*
Gauge	Shows status on a gauge	Set manually				
Image Gallery	Creates a slideshow with images and captions	Content added manually			Custom page only	
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually			Custom page only	
Video (Featured)	Display a video from anywhere on the Internet	Content added manually		Custom page only	Custom page only	

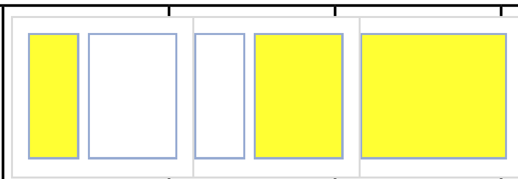
* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

Custom List tiles

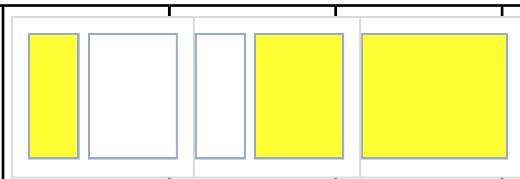
Tile	Description	Dependencies	 Narrow column	Widecolumn	Jumbo column	Jive Daily support
Categories	Display content in selected categories	Relies on categories configured in the current place		Custom page only	Custom page only	
Content Sets	Shows community content inside a tile, in a browse sequence you design. For more information, see Using Content sets and Content Sets tiles on page 311	Content added manually		Custom page only	Custom page only	
Expandable Sections	Shows links to community content under collapsible headings	Content added manually			Custom page only	
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	Widecolumn	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 questions that include a reply marked as Correct Answer or Assumed Answered		Custom page only	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	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			Custom page only	



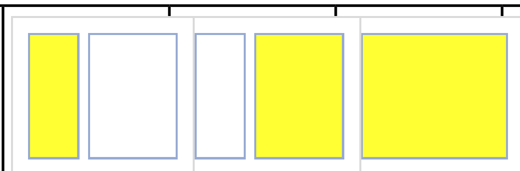
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Leaderboard	Shows frequentcontributors to the place	Populated when activity happens in the place. Note that this tile uses the same information as the status levels in your community				
Popular Content	Shows content that is getting views and likes	Relies on content getting viewed and liked		Custom page only	Custom page only	
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 **Use this view in a tile** at the bottom of any People, Places, or Content browsing result			Custom page only	
Tagged Content	Displays content that matches specific tags	Relies on content being tagged				



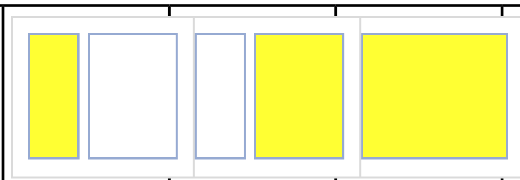
Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Trending Content*	Displays content with the most views and interactions	Relies on views, likes, and shares		Activity page only		Activity page only
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on questions that do not yet have a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	

* Content items can be excluded from the **Trending Content** tile.

Support tiles

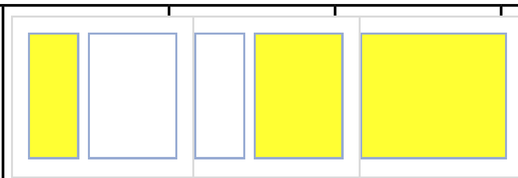


Tile	Description	Dependencies	Narrow column	Widecolumn	Jumbo column	Jive Daily support
Answered Questions	Displays a list of questions that have been answered in the place	Relies on questions that include a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	
Ask a Question	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			Custom page only	



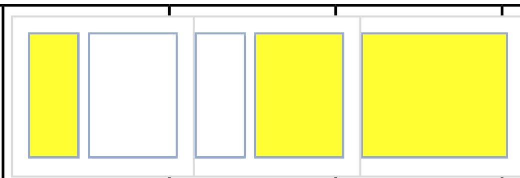
Tile	Description	Dependencies	Narrow column	Widecol-umn	Jumbo column	Jive Daily support
Helpful Links	Build a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually				
Super List	Shows an updated, filtered view of content, people, or places	Relies on a query: click **Use this view in a tile** at the bottom of any People, Places, or Content browsing result			Custom page only	
Unanswered Questions	Displays a list of questions that have not yet been answered in the place	Relies on questions that do not yet have a reply marked as Correct Answer or Assumed Answered		Custom page only	Custom page only	

External Add-Ons tiles

Tile	Description	Dependencies	 Narrow column	Widecolumn	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 page only	*

* The configuration of each Custom HTML tile defines if it is available on Jive Daily: Intranet on the go. For more information, see Using Custom HTML tiles on page 306.

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			Custom page only	
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			Custom page only	

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

Note: You must have widgetized Overview pages enabled in your community. To enable widgets in your community, you need to contact Support. For more information, see Getting started with the new Jive Support Portal on Worx.

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 343. For the steps for customizing overview pages, see Setting up Overview page on page 335.

A good starting point for thinking further about designing Overview pages is the Extreme Makeover: Widget Edition blog post on Worx.

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 Place Templates for designing activity and custom pages for places on page 261.

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

You can have Activity, Overview, and custom pages enabled for your place. The leftmost page in the place navigation menu becomes the landing page of your place. For more information about changing the order of items in the menu, see Managing page navigation in places on page 267.

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 333.

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 **Gear icon** > **Settings** . The **Edit Group** page opens.
2. Click **Advanced Options** .
3. Select the **Overview page** check box.

   Note: When widgets are enabled, you can use an Overview page in addition to an Activity page. By default, the Overview page is set as the landing page for the place. You can change this by using page navigation, as described in Managing page navigation in places on page 267.

4. Click **OK**.
5. 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.

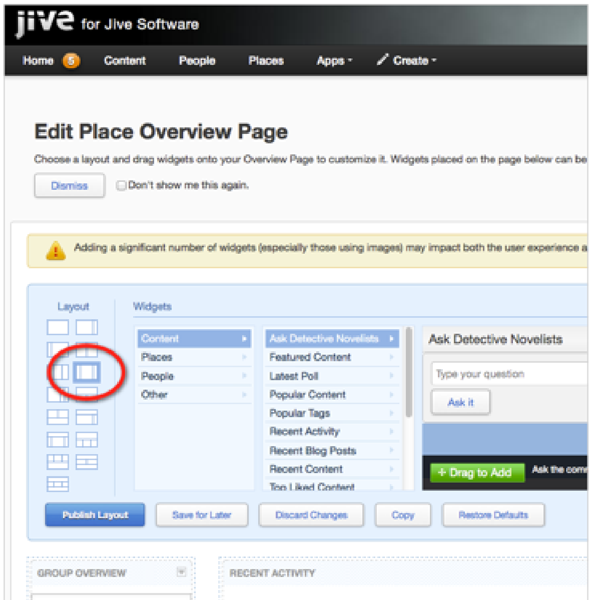
Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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.

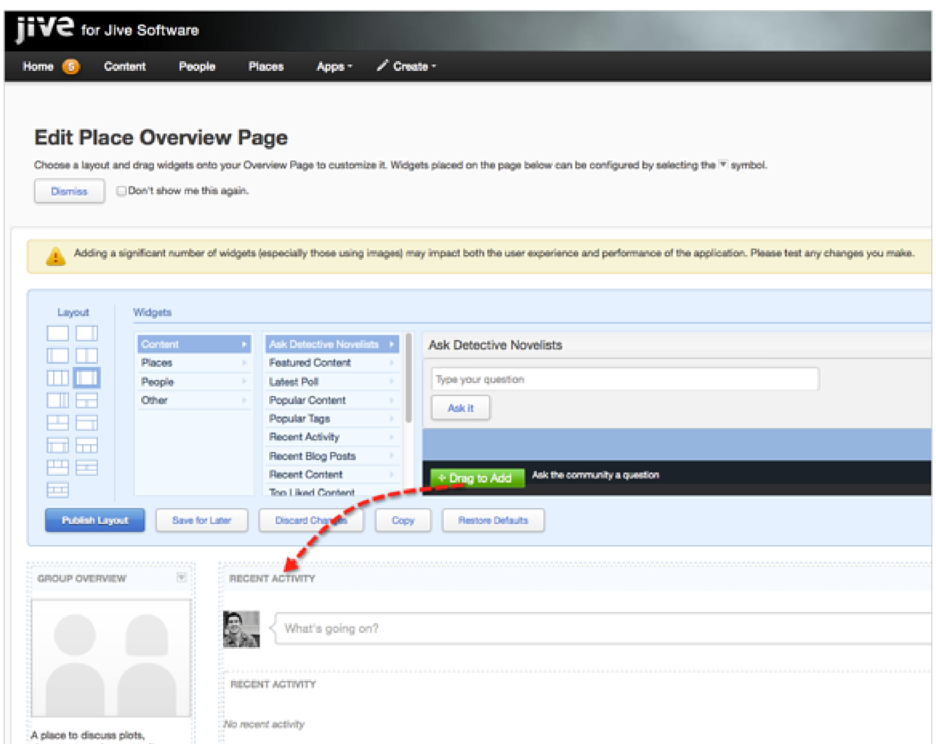
To customize the Overview page of a place:

1. In your place, click the **Manage** > **Overview page** .
2. Under **Layout**, select the layout for the page.



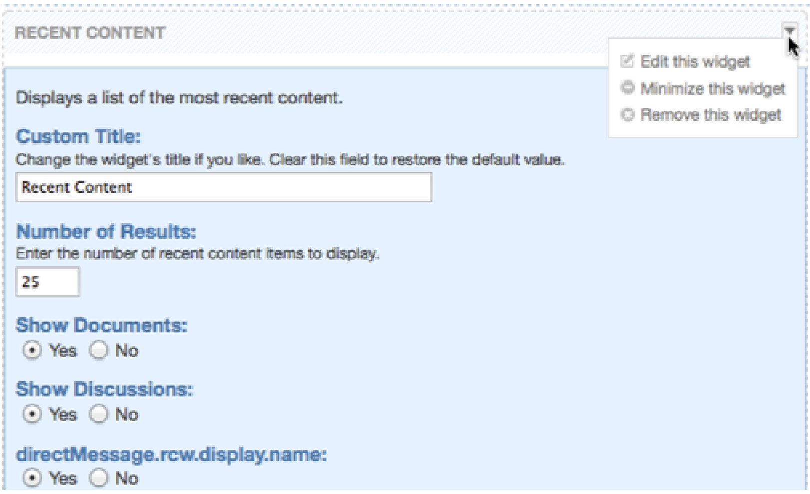
Note that the available widgets depend on the layout you selected.

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 336-Step 5 on page 337.
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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 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 question 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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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
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.

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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 342.

: 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.

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"/>
```

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.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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
GroupOverview	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.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 333.

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 question in the place	All
Event Calendar	Displays upcoming events for the space or group in a calendar format	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, `http://yourcommunity/version/events/1000`. In this case, the ID is 1000	All
Featured Content	Shows the featured content (place owners can designate content items to feature).	All
Featured Video	Shows a featured video	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, questions, 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	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
Recent Ideas	Displays the recent ideas of the place.	All
Recent Videos	Displays the recent videos.	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

Name	Description	Used In
Tagged Event	Displays the most recent event that uses a specific tag that you define.	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 questions in the current place that 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.	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

Name	Description	Used In
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

Name	Description	Used In
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

Name	Description	Used In
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 `<button>` class	All
Image Navigation	Displays a clickable menu of images and captions linked to locations you select	All

Name	Description	Used In
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 Enabling Social Media sharing on page 131	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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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.

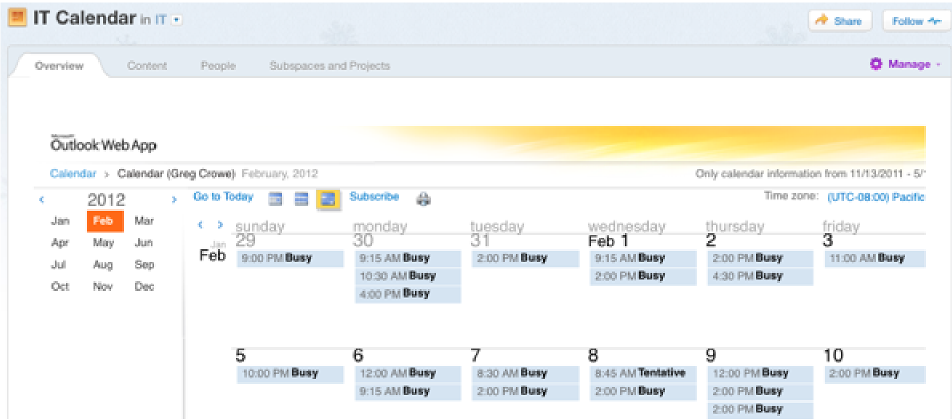
Note: You cannot share calendars contained in public folders. A shared calendar must be a user mailbox.

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:

Figure 12: Shared Exchange calendar



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 **Gear icon** > **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
Add tags	Applies the same tags to all of the selected items.
Add categories	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.
Set outcomes	Applies the same outcomes, such as Outdated or Final, to all of the selected items.
Move	Moves all of the selected items to the new place you choose.
Delete	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 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 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. 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 350.

To manage social group or project categories:

1. Go to your group or project.
2. Select **Gear icon** > **Categories** to open the **Manage Categories** dialog box.
3. To add a new category, do the following:
   a. Click **Add new category** to open the **Add new category** dialog box.
   b. In **Name**, specify the category name.
   c. In **Tags**, specify the related tags. You can apply this category to popular place tags by selecting the **Apply this new category to all content using the suggested tags?** check box.
   d. Click **Save**.
4. To edit a category, click  next to the category, change the settings, and then click **Save**.
5. To change the order of categories, use arrows next to categories to move them in the list.
6. To delete a category, click  next to the category.
7. When you're finished making changes to categories list, click **Finished**.

The categories you've set up become available to the users of your place.

Managing content categories from 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 350.

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) 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.

Arranging space hierarchy

You can view the list of spaces and organize the space hierarchy in the Admin Console.

Fastpath:

- **Admin Console** > **Permissions** > **Spaces**
- **Advanced 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. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Spaces**
   - **Advanced Admin Console** > **Spaces** > **Management** > **Summary**
2. To create a new space, select the parent space for the new space and then:
   - Click > **Add a Subspace** .
   - Click **New** in the Advanced Admin Console

   For more information, see Creating new spaces from the Admin Console on page 358.
3. To edit space properties, select the space and then:
   - Click > **Edit general information** .
   - Click **Edit** in the Advanced Admin Console

   For more information, see Setting up general space settings on page 361 and Renaming the root space.
4. To change the order of subspaces of a space, drag-and-drop the subspaces.
5. To move a space to another parent space, select the space and then:
   - Click > **Move Space** .
   - Click **Move** in the Advanced Admin Console

   After that, select a new parent space in the dialog box, and click **Move Space**.
6. To delete a space and all content inside it, select the space and then:
   - Click > **Delete Space** .
   - Click **Delete** in the Advanced Admin Console

   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. If you delete a space that includes subspaces, all subspaces are deleted as well. Also note that deleting a space make take some time.

Renaming the root space

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

Fastpath:

- **Admin Console** > **Permissions** > **Spaces**
- **Advanced Admin Console** > **System** > **Settings** > **Space**

To change the name of the root space in the Admin Console

1. Go to **Admin Console** > **Permissions** > **Spaces** .
2. Click > **Edit general information** next to the name of the root space.

   The root space is the top one in the list; it's called `community` by default.
3. In **Name**, enter the community name.
4. Optionally, in **Description**, enter the community description.
5. Optionally, in **Locale**, specify the default community locale.

   The default locale is `Inherit [English]`.
6. Click **Save Changes**.

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

To change the name of the root space in the Advanced Admin Console

1. Go to **Advanced Admin Console** > **System** > **Settings** > **Space** .

   This opens the **Space Settings** page.
2. 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

By default, the Activity page is used as the main space page. It uses tiles to present information. In some cases, you can also enable the Overview page that uses widgets instead of tiles.

Advanced space creation options

In the following table, the asterisks (*) note when this advanced option for place navigation might be unavailable.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 Place Templates for designing activity and custom pages for places on page 261. Place Templates only apply to Activity pages.	Yes.
Design a landing page with widgets*	Select the **Overview page** check box under the **Advanced Options** during setup, and fill out a widget layout under **gear icon** > **Overview Page** from the group page. For more information, see Designing Overview pages for places on page 333.	Yes.
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 Adding custom pages to places on page 262.	Yes.
Integrate external streams from Facebook, Chatter, or any other apps your community admin has enabled.*	Create the group, then click **Add a stream integration** when configuring the Activity page. For more information, see Adding tiles with external stream integrations to Activity page on page 265.	Yes, but keep in mind that some external stream types cannot be disconnected from the group except via a Support call.
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.

I want to. . .	You should. . .	Can I change this later?
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 Using external file storage on page 135.	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 spaces from the Admin Console

Creating several spaces quickly is easy 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** > **Permissions** > **Spaces**
- **Advanced Admin Console** > **Spaces** > **Management** > **Summary**

Note that if you creating a new space in the Admin Console, the content type settings are copied from the parent space. You can you can redefine them later. For more information, see Setting up allowed content types for spaces.

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 Place Templates for designing activity and custom pages for places on page 261.

To create a space from the Admin Console

1. Go to **Admin Console** > **Permissions** > **Spaces** .
2. To create a new space, next to the name of the space that will contain it click > **Add a subspace** .

   This opens the **Space Creation: <parent space>** page where you can specify the space details. The parent space is listed for reference.
3. 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**, specify the text to be used in space URLs if you want to change the default one.

6. If you want the to have the same access scheme as the parent space, then select **Inherited** under **Permissions** and then click **Create**.

   This creates a new space with the permissions inherited from the parent space.

7. If you want to customize the access scheme, than select **Custom** under **Permissions**.
8. Choose one of the following options as the staring point for further permissions configuration:
   - **Use inherited permissions as a starting point**: The new space will have the same permissions as the parent space.
   - **Use default space permissions as a starting point**: The new space will have the same permissions as the default (root) space. Note that the space is only assigned the same permissions as the root space but won't inherit them.
   - **No permissions, start with a blank slate**: The permissions won't be set for any user group or account.

     The permissions are not selected for the default user groups **Everyone** and **All registered users** as well.

9. Click **Create - Then Define Permissions**.

   The space is created with the specified settings and the space page where you can define the space permissions is opened for editing. For more information about setting up space permissions, see Managing space permissions on page 390. For details on settings up for user groups and individuate user accounts, see Setting up user group permissions for spaces on page 394 and Creating user overrides for spaces on page 396.

To create a space from the Admin Console

1. Go to **Advanced Admin Console** > **Spaces** > **Management** > **Summary** .

   This opens the **Space Summary** page.

2. Select the **Browse** tab.
3. Click the name of the space that will contain it, then click **NewCreate a subspace** next to it.

   This opens the **Create New Space** page where you can specify the space details. The parent space is listed for reference.

4. In **Space Name**, enter the space name to appear in the user interface.
5. In **Description of space**, enter a description to appear in the user interface, such as a brief description of what the space is for.
6. In **Space Display Name**, specify the text to be used in space URLs if you want to change the default one.
7. Under **Content**, select the content types you want to be available in the space.
8. If you want the to have the same access scheme as the parent space, then select **Inherited** under **Permissions** and then click **Create**.

   This creates a new space with the permissions inherited from the parent space.

9. If you want to customize the access scheme, than select **Custom** under **Permissions**.

10. Choose one of the following options as the staring point for further permissions configuration:

   - **Use inherited permissions as a starting point**: The new space will have the same permissions as the parent space.
   - **Use default space permissions as a starting point**: The new space will have the same permissions as the default (root) space. Note that the space is only assigned the same permissions as the root space but won't inherit them.
   - **No permissions, start with a blank slate**: The permissions won't be set for any user group or account.

     The permissions are not selected for the default user groups **Everyone** and **All registered users** as well.

11. Click **Create - Then Define Permissions**.

   The space is created with the specified settings and the space page where you can define the space permissions is opened for editing. For more information about setting up space permissions, see Managing space permissions on page 390. For details on settings up for user groups and individuate user accounts, see Setting up user group permissions for spaces on page 394 and Creating user overrides for spaces on page 396.

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 Place Templates for designing activity and custom pages for places on page 261.

Important: We do not recommend that you use widgets and widgetized Overview pages (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

Note: Creating several spaces quickly is easier from the Admin Console, as described Creating new spaces from the Admin Console on page 358.

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 350.

   ---
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.
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 Place Templates for designing activity and custom pages for places on page 261 and Designing Overview pages for places on page 333.

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** > **Permissions** > **Spaces** , then > **Edit general information**
- **Advanced 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 45.

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.

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 123.

Option	Description
Enable Email Alerts	Indicates if an email sent when 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 **Email Addresses** box.
Open Question Age	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.
Email Addresses	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 440.

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.

Caution: Cloud instances do not have the Full Access role. Therefore, you should assign more than one person to the Global Moderator role.

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 Reviewing content moderation requests on page 450.

For the charts of abuse rules for content types and comments to content see Abuse for Contained Content Types on page 364 and Abuse for comments on content on page 365.

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 on page 442.

Table 23: Chart of abuse rules for comments on content

<table>
<tr><th></th><th>Polls</th><th>Documents</th><th>Discussions</th><th>Blog posts</th><th>Videos</th><th>Ideas</th><th>Status updates</th></tr>
<tr><td>Root container</td><td>1. Global moderator
2. Full access</td><td colspan="2">Cont type not available</td><td>1. Global moderator
2. Full access</td><td colspan="2">Cont type not available</td><td>1. Global moderator
2. Full access</td></tr>
<tr><td>Open andmember social groups</td><td colspan="6">1. Global moderator 2. Full access</td><td>Cont type not available</td></tr>
<tr><td>Private and secret social groups</td><td colspan="6">1. Full access</td><td>Cont type not available</td></tr>
<tr><td>Spaces and subspaces</td><td colspan="6">1. Space moderator 2. Global moderator 3. Full access</td><td>Cont type not available</td></tr>
<tr><td>Projects</td><td colspan="6">1. Space moderator 2. Global moderator 3. Full access</td><td>1. Global moderator
2. Full access</td></tr>
<tr><td>Your personal content</td><td colspan="3">• If visibility is All, then 1. Global moderator 2. Full access
• Otherwise, 1. Full access</td><td>1. Global moderator
2. Full access</td><td colspan="2">• If visibility is All, then 1. Global moderator 2. Full access
• Otherwise, 1. Full access</td><td>Cont type not available</td></tr>
</table>

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 on page 442.

Table 24: Chart of abuse rules for comments on content

<table>
<tr><th></th><th>Poll comments</th><th>Document comments</th><th>Discussion replies</th><th>Blog comments</th><th>Video comments</th><th>Idea comments</th><th>Status comments</th></tr>
<tr><td>Root container</td><td colspan="7">1. Global moderator 2. Full access</td></tr>
<tr><td>Open andmember social groups</td><td colspan="7">1. Global moderator 2. Full access</td></tr>
<tr><td>Private and secret social groups</td><td colspan="7">1. Full access</td></tr>
<tr><td>Spaces and subspaces</td><td colspan="6">1. Space moderator 2. Global moderator 3. Full access</td><td>Cont type not available</td></tr>
<tr><td>Projects</td><td colspan="6">1. Space moderator 2. Global moderator 3. Full access</td><td>1. Global moderator 2. Full access</td></tr>
<tr><td>Your personal content</td><td colspan="3">If visibility is All, then 1. Global moderator 2. Full access
Otherwise, 1. Full access</td><td>1. Global moderator 2. Full access</td><td colspan="2">If visibility is All, then 1. Global moderator 2. Full access
Otherwise, 1. Full access</td><td>Cont type not available</td></tr>
</table>

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 368.
2. Generate the HTML code to be used on another site, as described in Generating script for Community Everywhere on page 368.
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 370.

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 368.

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 replies.
- **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 370.

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 368 and Generating script for Community Everywhere on page 368, 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. We recommend that you leave properties unchanged unless you're asked to change it by Jive's support team.

Note: Names and values of extended properties are case-sensitive.

Managing Content Permissions

You can manage global permissions for content features, such as polls and announcements, for the whole community and, if required, set up separate content permissions for individual spaces.

The community's landing page includes global permissions for actions like managing announcements, which is typically seen by everyone at one time or another. The landing page in your community, can be a great place to put things that should be visible to everyone. In other words, when setting global permissions, keep in mind 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. See About Home Page Permission Levels for the list of levels you can grant.

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 Home Page Permissions page of the admin console. See About Home Page Permission Levels for the list of levels you can grant.

Configuring community content types

You can define which content types users are able to create, such as blog posts, discussions, and documents. Here you can determine the settings for the whole community.

Fastpath: > **Content** > **Content Types**

You choose some or all of the available types for your community.

Note: If you would want to change the settings later, deselecting a content type does not remove existing content from your community, it only prevents people from creating new content of that type.

For more information about settings up content types for specific spaces, see Setting up allowed content types for spaces.

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. You can enable some of the content types and hide others from users. In space actions, the links for the hidden content types are removed.

For example, you can hide Documents, and the users won't be able to select and create Documents in the space. Also, the Document link in space Actions will be hidden.

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).

From this page you can set up content types only for a space you select under **change space**. The default content type settings for the whole community you can set from **Admin Console** > **Content** > **Content Types** . For more information, see Configuring community content types.

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 440.

Note that questions are listed with the discussions.

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 440.
- 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 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 350.

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 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.

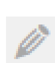
As a place administrator, you define categories in a way that's meaningful inside the particular place. As you create categories, think about how the place's content should be grouped. You can add up to 30 categories to a place.

Additionally, you can associate tags with categories. 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 350.

To manage social group or project categories:

1. Go to your group or project.
2. Select **Gear icon** > **Categories** to open the **Manage Categories** dialog box.
3. To add a new category, do the following:
   a. Click **Add new category** to open the **Add new category** dialog box.
   b. In **Name**, specify the category name.
   c. In **Tags**, specify the related tags. You can apply this category to popular place tags by selecting the **Apply this new category to all content using the suggested tags?** check box.
   d. Click **Save**.
4. To edit a category, click  next to the category, change the settings, and then click **Save**.
5. To change the order of categories, use arrows next to categories to move them in the list.

6. To delete a category, click next to the category.
7. When you're finished making changes to categories list, click **Finished**.

The categories you've set up become available to the users of your place.

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: **Advanced 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 *private unlisted* 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 Cloud User Help.

For more information about working with a community as external contributor, see Contributing to community as external user in the Cloud 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** > **Permissions** > **Social Groups**
- **Advanced 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 107.

To give users permission to create an externally accessible group:

1. Go to the configuration page:
    - **Admin Console** > **Permissions** > **Social Groups**
    - **Advanced Admin Console** > **System** > **Settings** > **Externally Accessible Groups**
2. Assign specific users or user groups the permission to **Create externally accessible groups**. For more information, see Permissions for external groups on page 376.

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 Cloud User Help.

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 Groups**
- **Advanced Admin Console** > **System** > **Settings** > **Externally Accessible Groups**

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 405. For more information about managing user groups, see Managing user groups on page 414.

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. Go to the user group configuration page and create a new user group for the users who must be able to create externally accessible social groups:
   - **Admin Console** > **Permissions** > **User Groups** , then click **Create New User Group**
   - **Advanced Admin Console** > **People** > **Management** > **Create User Group**

   For more information, see Creating user groups.
2. Go to the social group permission configuration page and assign the **Create externally accessible group** permissions to the user group created in Step 1 on page 377:
   - **Admin Console** > **Permissions** > **Social Groups**
   - **Advanced Admin Console** > **System** > **Settings** > **Externally Accessible Groups**

   For more information, see Setting up social group permissions for user groups on page 407.

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 416.

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:

1. Go to the social group permission configuration page:
   - **Admin Console** > **Permissions** > **Social Groups**
   - **Advanced Admin Console** > **System** > **Settings** > **Externally Accessible Groups**
2. Assign the **Create externally accessible group** user override to the users.

   For more information, see Configuring user overrides to social groups on page 408.

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 95.

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.

System Administration	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. You can't break out the bundled permissions in the administrative area (as you can with space permissions). For more information, see Managing System Administration permissions on page 384.
Spaces	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 Managing space permissions on page 390.
Blogs (global)	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 402.
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 405.
Content	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 and other content permissions on page 409.

Other Content 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 and other content permissions on page 409.

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	• View • Create • Comment
Documents, Blog Posts, Events, Ideas, Polls, and Videos	• View • Create • Comment
Avatars	Create up to five avatars*
Profile Images	• View • Create • Create up to 10 images*
User Profile Fields	• Edit and view all fields except the Mobile phone number field • Mobile phone number field: Edit and view, but only Connections can view this by default

* 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 pagecontent. For more information, see Managing user groups on page 414.
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 384 and Overview of space permission levels on page 391.
   b) Assign one or more access permissions, as described in Setting up permissions for user groups on page 383. 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 383. 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 414.

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 375.

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** > **Permissions** > **User Groups** , then click **Create New User Group**
- **Advanced 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 416.

To create a user group:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **User Groups** , then click **Create New User Group**
   - **Advanced Admin Console** > **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 pixel 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 416.
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 416.
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 is 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.

This is a general overview of the steps you should take to assign permissions to a user group. You can find the detailed procedures in other documentation sections.

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 **Select Permissions**.
   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.

This is a general overview of the steps you should take to configure user overrides. You can find the detailed procedures in other documentation sections.

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 Administrators**
- **Advanced 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.

Full Access	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.

Manage Community	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.
Manage System	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.
Moderate Content	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 Moderation on page 440 section.
Manage Users	This permission level allows the users to manage the users of the application. For more information, see Managing user accounts and user groups on page 413.
Manage Groups	This permission level allows the users to create and manage user groups, such as for assigning permissions. For more information, see Managing user accounts and user groups on page 413.
Manage News Streams	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 Customizing News page on page 47.
Manage Support Center	This permission level allows the users to configure the Support Center layout by adding sections and places, designing the background, or changing the header text. This permission is only useful if you have the Support Center enabled, which can be done by creating a case with Support. For more information, see Managing Support Center on page 35.

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 25: Overview

Console page	Manage communi-ty	Manage system	Moderate content	Manage users	Manage groups
Overview			Ø		

Table 26: System

Console page	Manage communi-ty	Manage system	Moderate content	Manage users	Manage groups
System > Management					
All pages			Ø	Ø	Ø
System > Settings					
All pages			Ø	Ø	Ø
System > Moderation					
ModerationConfigura-tion			Ø		Ø
Config Spam Preven-tion			Ø	Ø	Ø
Spam Link Domain WL			Ø	Ø	Ø

Table 27: Spaces

Console page	Manage communi-ty	Manage system	Moderate content	Manage users	Manage groups
Spaces > Management					
All pages		Ø	Ø	Ø	Ø
Spaces > Settings					
All pages		Ø	Ø	Ø	Ø

Table 28: Blogs

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
Blogs > Management					
All pages			Ø	Ø	Ø
Blogs > Settings					
All pages			Ø	Ø	Ø

Table 29: People

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
People > Management					
User Search			Ø		
Create User			Ø		Ø
Group Summary			Ø	Ø	
Create Group			Ø	Ø	
User Relationships			Ø		Ø
Org Chart			Ø		Ø
People > Settings					
Avatar Settings			Ø	Ø	Ø
Ban Settings			Ø		Ø
Directory Server Settings			Ø	Ø	Ø
Forgot Username			Ø	Ø	Ø
Guest Settings			Ø	Ø	Ø
Hover Card Settings			Ø		Ø
Login Security			Ø	Ø	Ø
Org Chart Settings			Ø	Ø	Ø
Password Reset			Ø	Ø	Ø
Profile Image Moderation			Ø	Ø	Ø
Profile Settings			Ø		Ø

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
Registration Settings			Ø	Ø	Ø
Single Sign On			Ø	Ø	Ø
Status Level Settings			Ø	Ø	Ø
Terms and Conditions			Ø	Ø	Ø
User Status Update Settings			Ø	Ø	Ø

Table 30: Permissions

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
All pages			Ø	Ø	Ø

Table 31: Mobile

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
All pages			Ø	Ø	Ø

Table 32: Add-ons

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
All pages			Ø	Ø	Ø

Table 33: Video

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
Preferences			Ø	Ø	Ø

Table 34: Events

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
General			Ø	Ø	Ø

Table 35: Ideas

Console page	Manage community	Manage system	Moderate content	Manage users	Manage groups
All pages			Ø	Ø	Ø

Setting up administrative permissions for user groups

You can assign groups of users the system administrator permissions.

Fastpath:

- **Admin Console** > **Permissions** > **System Administrators**
- **Advanced Admin Console** > **Permissions** > **System Administration Permissions**

To set up administrative permissions for user groups in the Admin Console:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **System Administrators**
   - **Advanced Admin Console** > **Permissions** > **System Administration Permissions**
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 391.

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 380.
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 405.

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 397.
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 398.

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 405.

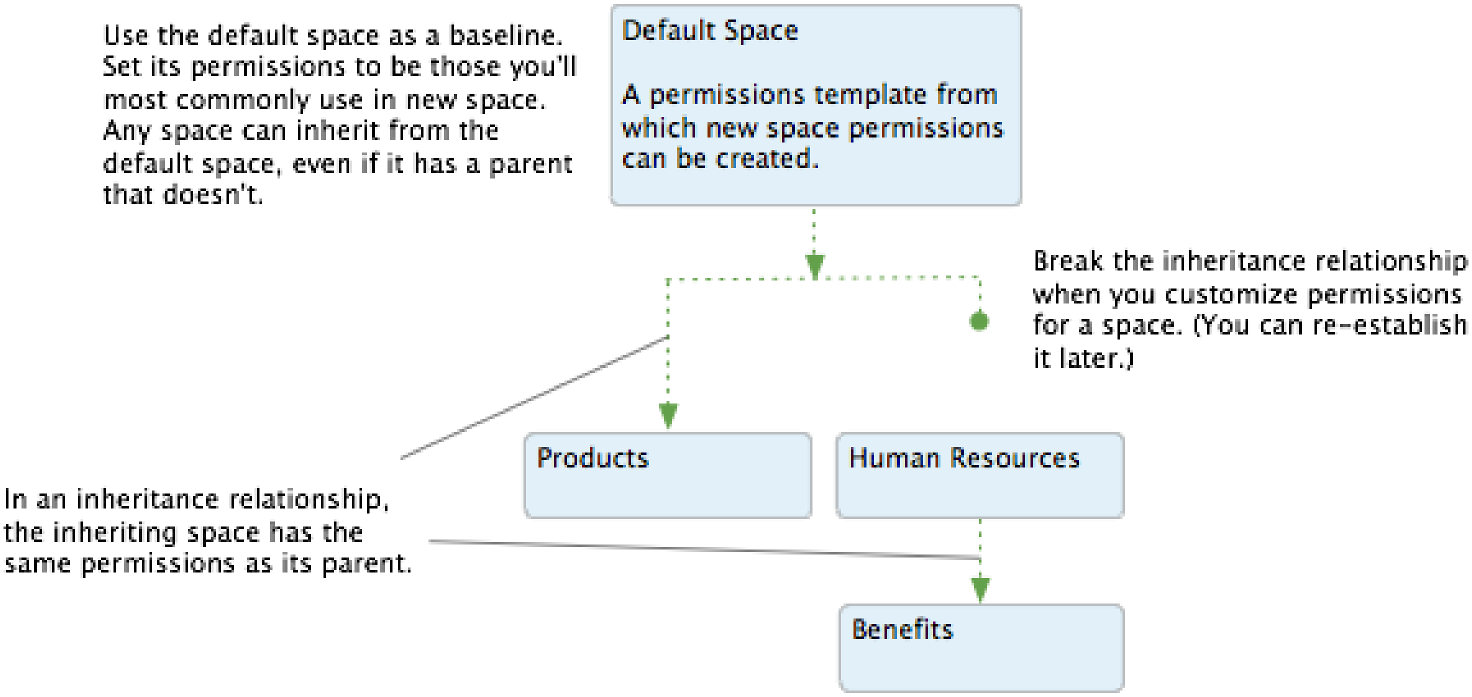
How spaces inherit permissions

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 a 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** > **Spaces**
- **Advanced 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.

The root space permissions are applied to all top-level spaces which inherit the settings and are used as the default setting when creating a new space. For more information on setting up permissions, see Overview of permission assignments on page 380.

To customize root space permissions:

1. Go to the configuration page:
    - **Admin Console** > **Permissions** > **Spaces** , then click  > **Configure permissions** next to the name of the root space.

      The root space is the top one in the list; it's called `community` by default.
    - **Advanced Admin Console** > **Permissions** > **Space Permissions** , then click **Edit default space permissions**.

This opens the **Default Space Permissions** page where you can set up the default permissions for the community.

2. Set up permissions for user groups.
   a. On the permissions page, under **Groups with access**, review permissions to user groups.
   b. To assign permissions to a user group not yet added:
      a. Click **Add group**.
      b. Enter the name of the user group to you want to add.
      c. Under **Select Permissions**, select the default permission level for the group.

         You can choose one of the default permission levels or click **View/edit custom level** and define custom permissions for the group.
      d. Click **Add Group**.

   The group is added to the list and the group members are assigned the configured permissions.
3. Set up permissions for individual users.

   Attention: We recommend creating and employing user groups with necessary permissions instead of assigning permissions for individual users.

   a. Under **User Overrides**, click **Create a user override**.
   b. 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.
   c. Click **Set exception**.

      This opens the **Set exception** dialog box.
   d. Under **Access and administration**, select the general permission level, and then select permissions for user.
   e. Click **Save** to save the changes.

   The permissions are applied to the selected user immediately.

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** > **Spaces**
- **Advanced 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 397 and Custom permission levels and user overrides for spaces on page 398. 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. Go to the configuration page:

   - **Admin Console** > **Permissions** > **Spaces** , then click > **Configure permissions** next to the name of the space.
   - **Advanced Admin Console** > **Permissions** > **Space Permissions** and select the space under **View and edit a space's permissions**.

   This opens the space's page.

2. Click **Customize this space's permissions** to start customizing space permissions.

   This option is available until the space inherits permissions from the parent place. If the space permissions are customized you will see a **This space is using a custom permission scheme** message.

3. 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) Under **Select Permissions**, select the default permission level for the group.

      You can choose one of the default permission levels or click **View/edit custom level** and define custom permissions for the user group.

   d) Click **Add Group**.

   The selected permissions are granted to the user group.

4. 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) Under **Select Permissions**, select the default permission level for the group.

      You can choose one of the default permission levels or click **View/edit custom level** and define custom permissions for the user group.

   d) Click **Save**.

   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** > **Spaces**
- **Advanced 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. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Spaces** , then click  > **Configure permissions** next to the name of the space.
   - **Advanced Admin Console** > **Permissions** > **Space Permissions** and select the space under **View and edit a space's permissions**.

   This opens the space's page.
2. Click **Re-establish permission inheritance to <space name>** and click **Apply** to confirm.

The inheritance from the parent place is re-established, all permission customizations of the child space are removed, and the permissions from the parent place are applied to the space.

Creating user overrides for spaces

You can create an override for an individual user of a space.

Fastpath:

- **Admin Console** > **Permissions** > **Spaces**
- **Advanced Admin Console** > **Permissions** > **Space Permissions**

To grant a particular set of permissions to an individual, you create a user override. An override can be used if:

To create a user override for a space:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Spaces**
   - **Advanced Admin Console** > **Permissions** > **Space Permissions**
2. Click **Customize this space's permissions** to start customizing space permissions.

   This option is available until the space inherits permissions from the parent place. If the space permissions are customized you will see a **This space is using a custom permission scheme** message.
3. Under **User Overrides**, click **Create a user override**.
4. 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.
5. Click **Set override** to view the permissions you can assign.
6. 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.
7. 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** **Admin Console** > **Permissions** > **Spaces**

Additionally, you can also add your own levels, as described in Custom permission levels and user overrides for spaces on page 398.

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 398.

Space permission level	Access granted
Administer	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
Moderate	Read and write all content types, edit other user content
Create	Read and write all content types
Contribute	Comment on commentable content types and reply to questions and discussion threads
View	View content
Discuss	Read and write in discussions and questions, contribute on all other content types. This permission applies only for a space's own content.
No Access	Only applicable when creating a user override. Use this to prevent access to the space and no entitlements are set

Note: Shared content always inherit its own place's permission. For example, shared content from a private place may not be visible for other users with different permissions.

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** **Admin Console** > **Permissions** > **Spaces**

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 36: Access Granted for Each Content Type Permission Level

Content Type Permission	View	Create	Reply	Comment	Rate	Vote
Create						
Create (for discussions and questions)						
Contribute		Ø				
View		Ø	Ø	Ø	Ø	Ø
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 37: Access settings available for each content type

Content Type	View	Create	Rate	Comment/Reply	Additional
External Object					
Discussion and question					
Poll					Vote
Blog Post					
Document					
Video					
Content share			Ø	Ø	
Idea					
Event					Insert Image

The following options are also available for customization.

Table 38: Additional access settings

Option	Access Granted
Create Project	Create a project in the space
Create Announcement	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 39: Manage space settings

Option	Access Granted
Full Control	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
Moderate	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 440.

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 Admin Console** > **Permissions** > **Permission Levels** .

For more information about custom space permission levels, see Custom permission levels and user overrides for spaces on page 398.

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.

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 Advanced Admin Console. For more information, see Managing blogs on page 125.

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 Managing space permissions on page 390.
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 Managing social group permissions on page 405.
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 Managing space permissions on page 390.

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** > **Blogs**
- **Advanced 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. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Blogs**
   - **Advanced Admin Console** > **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 **Select Permissions**.
   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** > **Blogs**
- **Advanced 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:

To set up overrides for global blogs to individual users:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Blogs**
   - **Advanced Admin Console** > **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 Groups**
- **Advanced 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
View social group	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 **Group** from the **New** menu in the user interface.
Create group (public)	Create a new a public or members only social group.
Create group (private)	Create a new private or secret (also known as private unlisted) social group.

Permission	Access granted
Manage social group	Manage any social groups.
Create externally accessible group	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 Groups**
- **Advanced 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. Go to the social groups configuration page:
   - **Admin Console** > **Permissions** > **Social Groups**
   - **Advanced Admin Console** > **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 **Select Permissions**.
   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 Groups**
- **Advanced 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:

To set up overrides for social groups to individual users:

1. Go to the social groups configuration page:
   - **Admin Console** > **Permissions** > **Social Groups**
   - **Advanced Admin Console** > **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:

- On the Group Activity page: **gear icon** > **Settings** > **Non-Member Content Editing**
- **Advanced Admin Console** > **System** > **Settings** > **Non-member Content Editing**

To enable non-member content editing for private groups in your community:

1. Go to the configuration page:
   - On the Group Activity page: **gear icon** > **Settings** > **Non-Member Content Editing**
   - **Advanced Admin Console** > **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 Private: Unlisted, also known as secret, 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 and other content permissions

The Other content 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 (including the Home page) in your community. For more information, see Understanding pages in places on page 257.

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 409.

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
Create announcement	Create announcements that appear on the Home page
Create poll	Create polls at the system level
Vote in polls	Vote in polls created at the system level
Create video	Create and upload videos in their personal containers
Rate videos	Rate the videos that they can access
Comment on videos	Comment on the videos that they can access
Create and Repost status updates	Create their own status updates and repost someone else's update
Like status updates	Like status updates of other users, which affects their status points
Comment on updates	Comment on other user status updates
View status updates	Allows users to view updates that others post
Insert status update images	Add images to their update as an attachment
Insert comment images	Add images to comments on updates
DM/Sharing user override	Override the DM/Sharing connection requirement
Create Attachments	Create attachments on content
Insert images	Insert images into content
Customize Site	Customize site appearance (theming)

Permission	Access Granted
Manage Slideshow Carousel	Manage the slide show displayed in a carousel widget used on the community's Home page and Overview pages
Save JavaScript	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: Advanced Admin Console > **Permissions** > **Other Content Permissions**

To set up permissions for user groups to Home page and other content types:

1. In the Advanced 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 **Select Permissions**.
   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** > **Content**
- **Advanced 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:

To set up overrides for the Home page and other content types to individual users:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **Content**
   - **Advanced Admin Console** > **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

Page	Description	Who can customize
GroupOverview	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 378.

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 420.

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 414.

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 92.

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.

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 92.

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** > **Permissions** > **User Groups** , then click **Create New User Group**
- **Advanced 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 416.

To create a user group:

1. Go to the configuration page:
    - **Admin Console** > **Permissions** > **User Groups** , then click **Create New User Group**
    - **Advanced Admin Console** > **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 pixel 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 416.
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 416.
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 is 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.

Fastpath:

- **Admin Console** > **Permissions** > **User Groups**
- **Advanced Admin Console** > **People** > **Management** > **User Group Summary**

If you want administrators 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 administrators 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. You can manage group administrators only from the Advanced Admin Console.

Note that unless they have access to the Admin Console, users won't know which user groups they're a part of.

Adding members and administrators to user groups

To add members and administrators to an existing user group:

1. Go to the configuration page:
   - **Admin Console** > **Permissions** > **User Groups**
   - **Advanced Admin Console** > **People** > **Management** > **User Group Summary**
2. To add members, in the **Admin Console**:
   a. Click > **Manage group members** next to the group from which you want to add or delete members.
   b. Under **Add Members to <user group>**, use the search box or people picker to select users whom you want to add as group members.
   c. Click **Add selected users**.

   The users you've selected are added to the group and you can see them in the **Group Members for <user group>** list.
3. In the Advanced Admin Console:
   a. Click the group name or **Edit** next to the group.
   b. Click **Edit** next to administrators or members depending on which you want to add or edit.
   c. Add members to the group by typing their name in the **Add Member** box, then clicking the **Add selected users** 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.
   d. 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.

Removing members and administrators from user groups

To remove members and administrators from an existing user group:

1. In the Admin Console, go to the configuration page:
   - **Admin Console** > **Permissions** > **User Groups**
   - **Advanced Admin Console** > **People** > **Management** > **User Group Summary**
2. To remove members, in the **Admin Console**:
   a. Click > **Manage group members** next to the group from which you want to add or delete members.
   b. Under **Group Members for <user group>**, select the **Remove** check box next to the members you want to remove.
   c. Click **Remove selected**.

   The users you've selected are removed from the group.
3. In the Advanced Admin Console:
   a. Click the group name or **Edit** next to the group.
   b. Click **Edit** next to administrators or members depending on which you want to add or edit.
   c. Under **Group Members for <user group>**, select the **Remove** check box next to the members you want to remove, and then click **Remove selected**.
   d. Under **Group Admins**, select the **Remove** check box next to the administrators you want to remove, and then click **Remove**.

   The users you've selected are removed from the group administrators.

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

---

Fastpath: Advanced 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 Advanced 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.

Configuring banning

The banning feature allows you to prevent users from accessing the community.

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 ban specific actions of a user; for more information, see Managing interceptors on page 155.

For each person you ban, you set a ban level that determines whether you're banning them from logging in or merely posting content. You can also set the duration of a ban. Additionally, you can leave a record for other administrators by adding a comment, such as a note about the reason you banned the user.

Fastpath: Admin Console: People > **Settings** > **Ban Settings**

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 202.

Ban a user account

Through the Ban User Account tab, you can ban someone by specifying their user-name.

Configuring user's banning

To ban a user:

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**.

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 92.

Creating user accounts with the Admin Console

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** > **Add Users**
- **Advanced 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 92.

To create a new user account:

1. Go to the configuration page:
   - **Admin Console** > **People** > **Add Users**
   - **Advanced Admin Console** > **People** > **Management** > **Create User**
2. 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: **, / ? & #**

   Note that some communities are preconfigured to use a user email address as their username.
3. In **Email**, enter the email address of the person.
4. In **User Type**, specify if this person is a regular user or an external contributor.
5. 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.
6. 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 202.
7. If you want to create this user and finish up user additions, 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 421.
8. If you want to create more user accounts after this one, click **Create and Create Another User**.

   The user account is created and the page's fields are cleared for you to create one more user account.

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** > **Search Users**
- **Advanced Admin Console** > **People** > **Management** > **User Search**

To view a user account summary or edit it:

1. Go to the configuration page:
   - **Admin Console** > **People** > **Search Users**
   - **Advanced Admin Console** > **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 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.

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 426.

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.

Fields 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 414.

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 175.

User properties

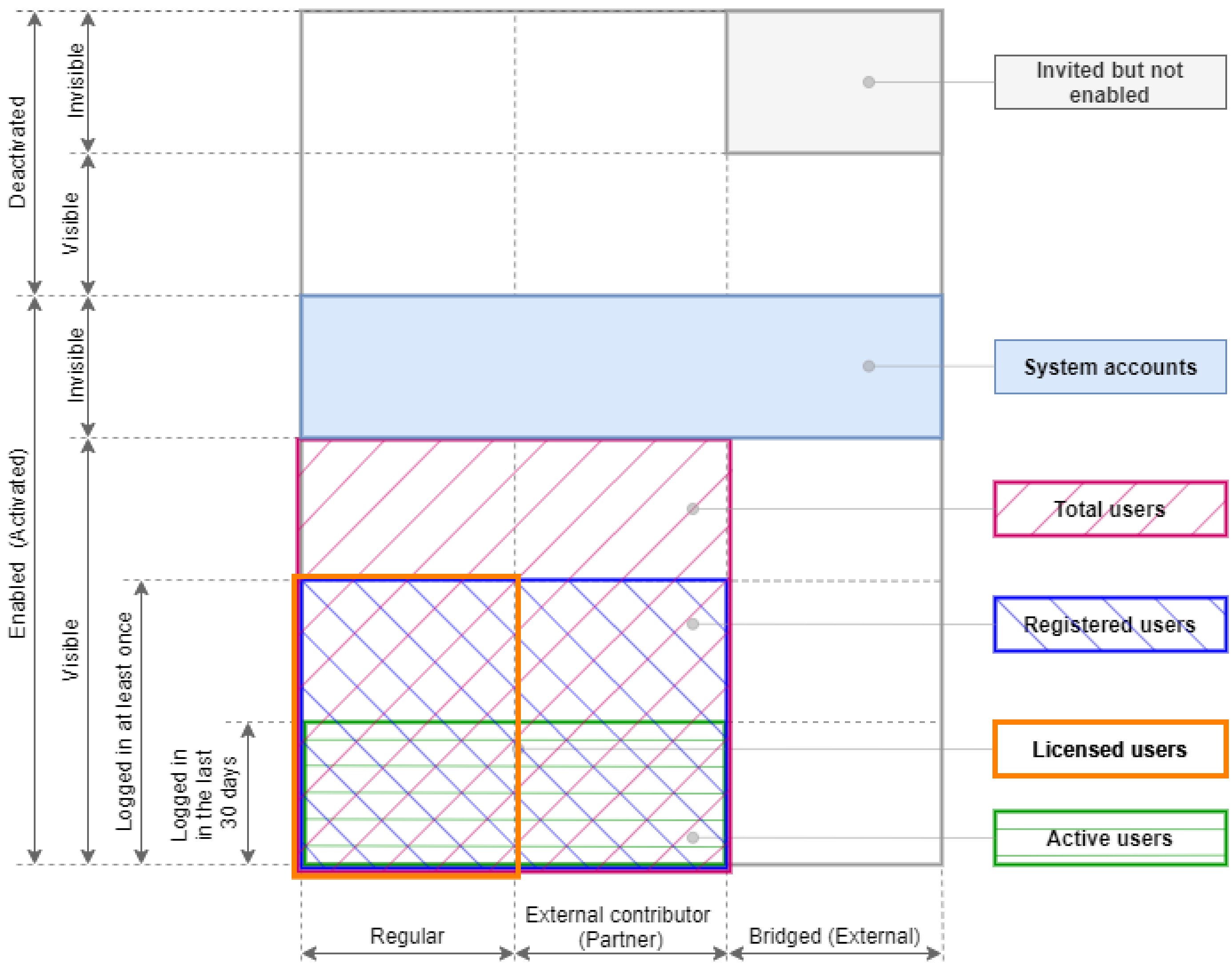
User properties are simple name-value pairs that developers can use to work with the user account in their code. User properties are often used as a way to keep track of extra information about the user account. A user can have multiple properties. When you're working with properties, remember that entering the name and value for an existing property will update that property's value to the one you entered.

User account characteristics and groups

Each user account in Jive has its characteristics. Jive uses them to identify different accounts groups for accounting purposes. You can also find these groups and characteristics across various Jive components and reports, such as the Admin Console, JCA, community analytics, and posted reports.

Figure 13 on page 424 shows the accounts characteristics and the main groups we use to classify all user accounts. Each of these is described in details below.

Figure 13: User account characteristics and groups



Account characteristics

We classify user accounts as follows:

Account type: regular, external contributor, or bridged	**Regular**: These are user accounts registered within your community. **External contributors**: Users who are not part of your community but are provided access to specifically defined groups. For more information, see Using external groups in the Cloud User Help.

	Note that previously external contributor accounts have been referenced as *partner* accounts. **Bridged**: User accounts from other Jive communities bridged to your community. For more information about bridging, see Connecting communities with bridges on page 230. Note that previously bridged accounts have been referenced as *external*.
Activated (enabled) or deactivated	**Activated** accounts can be used to interact with the community – log in, view and collaborate on content, manage users, or do any other tasks. Note that if an LDAP server is used to manage user accounts for your Jive community, you may see a large number of activated accounts as a result of user sync which may not represent the number of users actually using the community. **Deactivated** accounts are kept in the system but are inert and cannot be used to access the community. At the same time, the content that is associated with the account remains until the account is deleted. For more information, see Deleting and de-activating user accounts on page 426. Activated accounts can be also referenced as *enabled* and deactivated accounts as *disabled*.
Visible or invisible	Account **visibility** defines whether or not an account is visible from the front-end of Jive. This property is used with system administration and service accounts, such as the built-in *admin* user account. You can check the visibility of a user account through the Person Service API endpoint.
Logged in and logged in within the last 30 days	**Logged in** here means that the account has been used to log in to the community at least once. Additionally, we separate accounts that have been used to **log in within the last 30 days** to determine active community users.

Account groups for accounting purposes

Keeping in mind the characteristics above, we classify users as follows:

Total users	*Activated (Enabled) Visible* users that are not *Bridged*.
Registered users	*Activated (Enabled) Visible* users that are not *Bridged*, and have *Logged in* at some point in time.
Active users	*Activated (Enabled) Visible* users that are not *Bridged*, and have *Logged in* at some point *in the last 30 days*.
System accounts	*Activated (Enabled) Invisible* accounts created for administrative purposes. System service accounts are typically generic accounts utilized for purposes other than for accessing the community. For example, the built-in *admin* account is a system account.

Licenses are counted only for **registered visible active user accounts with at least one login**. You can find a detailed report on the License Usage page in the Admin Console. For more information, see Viewing user licenses on page 459.

User account statuses

Each user account is assigned a particular status that defines its registration status. Here you can find the list of possible statuses.

Invited	A community has sent an invitation to an unregistered person including the person's email in the message. This status is available if invitations are enabled in the community. For more information, see Configuring self-service user registration.
Awaiting moderation	The user account has at least the minimum necessary data and is awaiting moderation if account moderation is enabled in the community. For more information, see Setting up user registration moderation on page 452.
Approved	The user account in this status has successfully passed moderation if account moderation is enabled in the community.
Rejected	The user account in this status has failed moderation if account moderation is enabled in the community.
Awaiting validation	This status shows that the user's email is not confirmed if the email validation is enabled in the community. For more information, see Configuring self-service user registration.
Validated	This status shows that the user has their email validated if the email validation is enabled in the community.
Registered	After a user logs in to the community for the first time the account status
None	This status is used for the user accounts that do not belong to any other status, such as the system accounts.

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.

Fastpath:

- **Admin Console** > **People** > **Search Users**
- **Advanced Admin Console** > **People** > **Management** > **User Search**

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.

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 to the community. For more information, see Configuring banning.

To delete or deactivate a user account:

1. Go to the configuration page:

   Fastpath:

   - **Admin Console** > **People** > **Search Users**
   - **Advanced Admin Console** > **People** > **Management** > **User Search**

2. Find the user account you want to delete in the list and click on the user name.

   This opens the user properties page.
3. To deactivate the user account, click **Deactivate User**.

   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.

Configuring self-service user registration

You can configure the application so that new users can create their own accounts and invite others to join the community.

Fastpath:

- **Admin Console** > **People** > **User Registration**
- **Advanced 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.

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 169.

To enable and configure user self-registration:

1. Got to the configuration page:
    - **Admin Console** > **People** > **User Registration**
    - **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
2. Under **User-Created Accounts**, select the **Allow users to create their own account** to enable self-registration, 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.

- **Admin Console** > **People** > **User Registration**
- **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**

User-Created Accounts

Setting	Description
Allow users to create their own account	With this check box selected, user-created accounts are enabled, and registered users can invite others to join via email. For more information, see Inviting people to community on page 46. 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.
Require email address validation for users creating their own account	With this check box selected, self-registering users must validate their email. You can change the email template as described in Editing email notification templates on page 202.

Setting	Description
Use Enhanced Registration Flow	With this check box selected, self-registering users can complete account creation before being approved by an administrator. This setting enables a simplified form with only required fields. If you have guest access enabled, users who complete the form can be directed to continue navigating the site while waiting for registration approval.
Enforce Community Domain list	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.
Allow new external contributors to create their own account when invited by email to an externally accessible group	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 Managing external groups on page 375.

Security

Setting	Description
Registration Moderation	With this enabled, new requests appear on the moderator page in the community (**Moderation** > **Pending Items** .) If you have a user administrator, that person must approve or decline requests; otherwise, the system administrator gets those requests. For more information, see Setting up user registration moderation on page 452.

New Account Settings

Use the following table to configure user account settings.

Setting	Description
Password Strength Check	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.
Human Input Validation	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 simply 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.

Setting	Description
Email Validation Settings	With this feature enabled, the application sends an email to the person registering at the address they provided. You can edit the contents of the template used for the email. By default, the email includes a link that the person must follow to prove that the email address they gave is a valid one. This is another means to discourage false registration.
Welcome Email Settings	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.
Fields displayed at registration	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 Configuring user profile templates on page 436.

Configuring password settings

You can give people the ability to change or securely reset their own passwords and define the strength of each password.

Fastpath:

- **Admin Console** > **People** > **User Registration**
- **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
- **Admin Console** > **People** > **Password Reset**
- **Advanced Admin Console** > **People** > **Settings** > **Password Reset**

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.

To enable and configure password reset:

1. Go to the **User Registration** configuration page:
   - **Admin Console** > **People** > **User Registration**
   - **Advanced Admin Console** > **People** > **Settings** > **Registration Settings**
2. Under **Security**, in the **Password Strength Check** section, specify how strong each user password must be.
3. In the **Human Input Validation** section, select **Enabled** to present a captcha.

4. Click **Save Settings**.
5. Go to the **Password Reset** configuration page:
    - **Admin Console** > **People** > **Password Reset**
    - **Advanced Admin Console** > **People** > **Settings** > **Password Reset**
6. Under **Password Resetting Status**, select **Enabled**.
7. Click **Save Settings**.

Additionally, you can to configure the template of the email confirming the password reset. For more information about setting up email templates, see Setting up email on page 201.

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 92.

Configuring the Org Chart

The Org Chart shows the organizational relationships as a diagram making it easier for users to understand relationships between people. You can enable or disable the Org Chart in the Admin Console.

Setting up the Org Chart includes the feature setup and the user relationship configuration. By default, the Org Chart is enabled.

When you set up the feature, you define how the Org Chart should work in the community, in the Advanced Admin Console. For more information, see Setting up the Org Chart on page 432. And after you configure organizational relationships, users can see a graphical representation of their places in the organization structure, including their manager and coworkers. For more information, see Defining organizational relationships on page 432.

Setting up the Org Chart

The Org Chart shows the organizational relationships as a diagram making it easier for users to understand relationships between people. You can enable or disable the Org Chart in the Admin Console.

Fastpath: Advanced Admin Console: People > **Settings** > **Org Chart Settings**

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.

To enable and configure the Org Chart:

1. In the Advanced 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.

Defining organizational relationships

After you've set up the org chart, users will see a graphical representation of a user's place in the org chart, including their manager and coworkers, on a user's profile page.

Fastpath:

- **Admin Console** > **People** > **Org Chart**
- **Advanced Admin Console** > **People** > **Management** > **Org Chart**

To add organizational relationships

1. Go to the configuration page:
   - **Admin Console** > **People** > **Org Chart**
   - **Advanced Admin Console** > **People** > **Management** > **Org Chart**
2. Under **Create a user relationship**, enter the team leader and the team member usernames.

   You can type the usernames or browse and search a list of users to add users.
3. Click **Add** to add the relationship.

The relationship is added immediately and appears under **View relationships**. You can select how many items should on the page in **Items per page** — 15, 30, or 50. Additionally, 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**.

Besides that, the relationships of a particular user are displayed on the Org Chart on the user profile page.

To remove organizational relationships

1. Go to the configuration page:
   - **Admin Console** > **People** > **Org Chart**
   - **Advanced Admin Console** > **People** > **Management** > **Org Chart**
2. Under **View relationships**, find the relationships of by the username of one the user.

   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.

The relationship is removed immediately from the **View relationships** list. Besides that, it is removed for both affected users on the Org Chart on the user profile page.

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 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. 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.

Fastpath:

- **Admin Console** > **People** > **Global Profile Settings**
- **Advanced Admin Console** > **People** > **Settings** > **Global Profile Settings**

A user must have at least Manage System permissions to configure the profile fields.

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 436.

By configuring settings in the **Featured Profile Fields**, **Other Profile Fields**, and **Availability and Location** sections you can 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 using the Header Profile Fields and Other Profile Fields sections, see Configuring user profile templates on page 436.

Table 40: User Profile Fields settings

Setting	Description
Name Visibility	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: • Users see their full names on their profile page. • The administrators with Manage Groups or higher permissions see the full names on the user profile pages. For more information about permission levels, see Overview of System Administration permission levels on page 384.
Profile Image Visibility	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.
Creation Date Visibility	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.
Last Login Date Visibility	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 41: Other Options settings

Setting	Description
Allow Profile Images	Select **Yes** 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.
Allow Banner Image	Select **Yes** to allow people to allow users to use a banner image on their profile.
Show Full Name by Default	Select **Yes** 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 **Name Visibility** field, you can allow users to customize the visibility of their name.

Setting	Description
Show Full Name in User Mentions	Select **Yes** 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 **Name Visibility** field, you can allow users to customize the visibility of their name.
SkillsandEndorse-ments	Select whether you want to enable both skills and endorse-ments, enable only skills, or disable both. Skills are how users tag their own profile and endorsements are the tags others give users.
EmailNotifications	Select whether you want to enable email notifications, disable them completely, or let users decide for themselves. By de-fault, users can change their Notification Preferences by going to on their preferences page in the **Receive email or mobile notifications** field (**User Avatar** > **Preferences** > **General Preferences**). If you enable or disable email notifications, the users can see the **Receive email or mobile notifications** field but are not able to edit it.

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** > **Global Profile Settings**
- **Advanced Admin Console** > **People** > **Settings** > **Global Profile Settings**

A user must have at least Manage System permissions to configure the profile fields.

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 **Availability and Location** and **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 **Featured 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 them0, see Letting users control their own settings on page 434.

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 437. 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** > **Global Profile Settings**
- **Advanced Admin Console** > **People** > **Settings** > **Global Profile Settings**

A user must have at least Manage System permissions to configure the profile fields.

To create a custom profile field for user profiles:

1. Go to the configuration page:
   - **Admin Console** > **People** > **Global Profile Settings**
   - **Advanced Admin Console** > **People** > **Settings** > **Global Profile Settings**
2. Click **Create New Field**.

   This opens the **New Profile Wizard** page.
3. **Choose 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 (**LanguageDisplay Name**), 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 **Global Profile Settings** and **Profile Settings** pages.

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: Advanced 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 436 and Letting users control their own settings on page 434.

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 362.
- If you're trying to set up abuse reporting, see Setting up abuse reporting on page 363.

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.

Content moderation	You can enable content moderation in a space and the projects it contains, and in the root space and all social groups (because 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 448.
Document approval	Document approval is different from content moderation in that document approvers can only approve documents in a given space. For information about approvals, see Setting up document approver in space on page 362.
User registration moderation	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 Setting up user registration moderation on page 452.
Profile image moderation	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 Setting up profile image moderation on page 453.
Avatar moderation	You can enable moderation for every user-uploaded avatar image. For more information, see Setting up user-uploaded avatar moderation on page 453.
Abuse reporting	When users report abuse, the reports are sent to a moderator. For more information, see Setting up abuse reporting on page 363.

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 442.

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 363.

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:

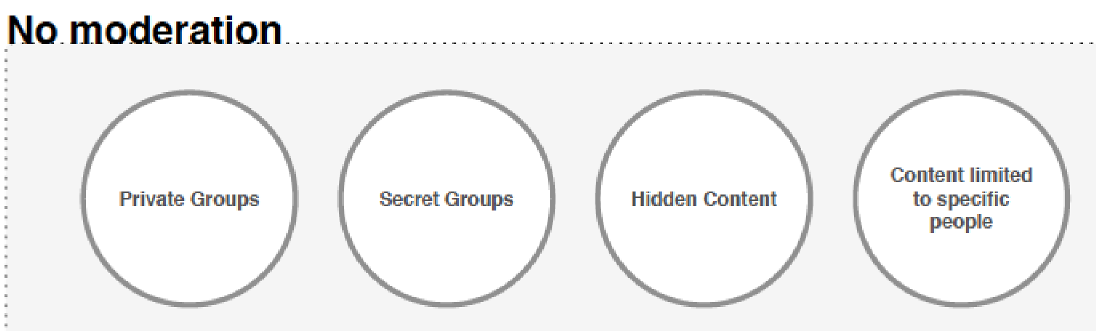
- The moderation queue for a given place is visible only to its moderators. It is not visible to moderators of other places.
- Content set for moderation remains unpublished and invisible to the community until the moderator approves it.
- Existing moderation requests cannot be routed to another moderation 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.



Note: Externally-facing communities (those serving customers, partners, and vendors), do not have the Personal Content (Hidden) feature.

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	**Permissions** > **Space Permissions** > **Moderate**
Global Moderator	**Permissions** > **System Administration** > **Moderate Content**
Full Access	**Permissions** > **System Administration** > **Full Access**

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 442.

Caution: We strongly recommend designating more than one moderator per place and more than one global moderator. For more information, see Moderation Best Practices.

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 42: Chart of moderation rules for contained content types

	Announcements	Polls	Documents	Discussions	Blog posts	Videos	Ideas	Status updates
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 sub-spaces	1. Space moderator 2. Global moderator 3. Full access							Content type not available

	Announcements	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	Content type not available	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 43: Chart of moderation 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						
Private and secret social groups	Cannot be moderated						
Spaces and subspaces	1. Space moderator 2. Global moderator 3. Full access						Content type not available

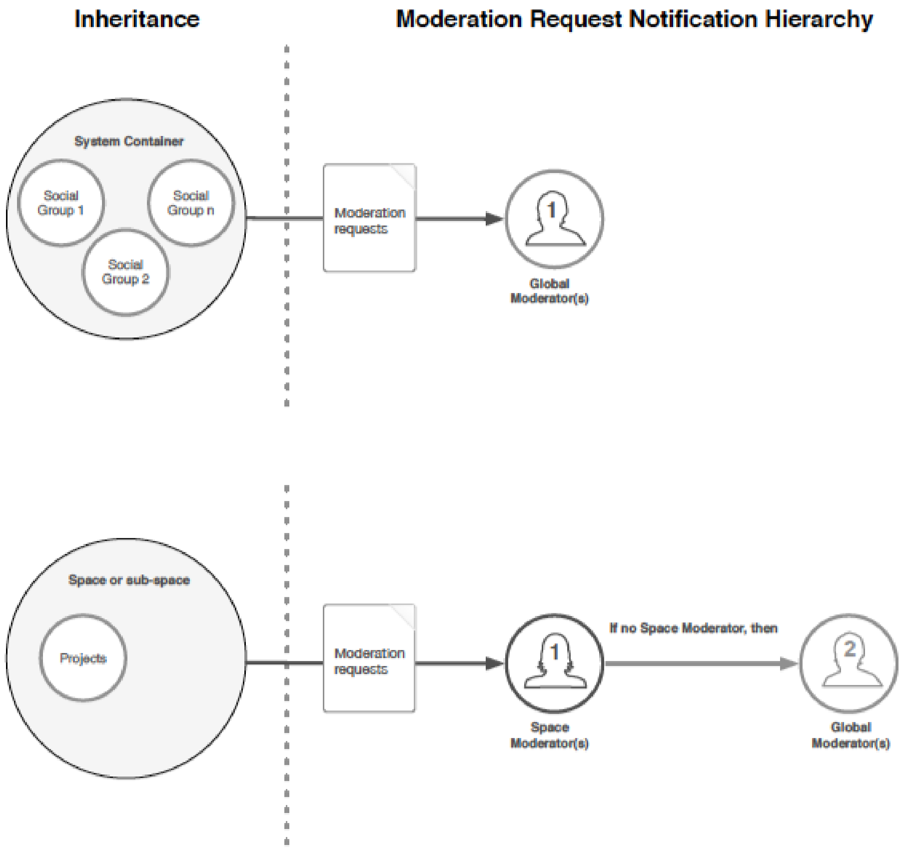
	Poll comments	Document comments	Discussion replies	Blog comments	Video comments	Idea comments	Status comments
Projects	1. Space moderator 2. Global moderator 3. Full access						1. Global moderator 2. Full access
Your personal content	Cannot be moderated unless Visibility = all, then 1. Global moderator 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 44: Chart of moderation rules for system-wide content types

	Avatar image	User registration	Profile images
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		
Spaces and subspaces	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 the Jive Community) and are moderated by global moderators.
- 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.

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 442 and Content that cannot be moderated on page 442.

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 440.

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.

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 on page 446.

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. For more information, see Moderator roles on page 442. For more information on setting up permissions, see Overview of permission assignments on page 380.

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. For more information, see Moderator roles on page 442.

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**.

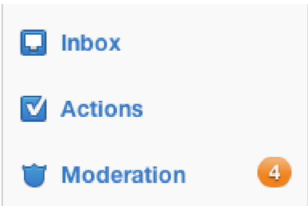
With moderation configured, the selected users or all users of the selected user group are able to view and moderate the specified content types for the specified space.

Reviewing content moderation requests

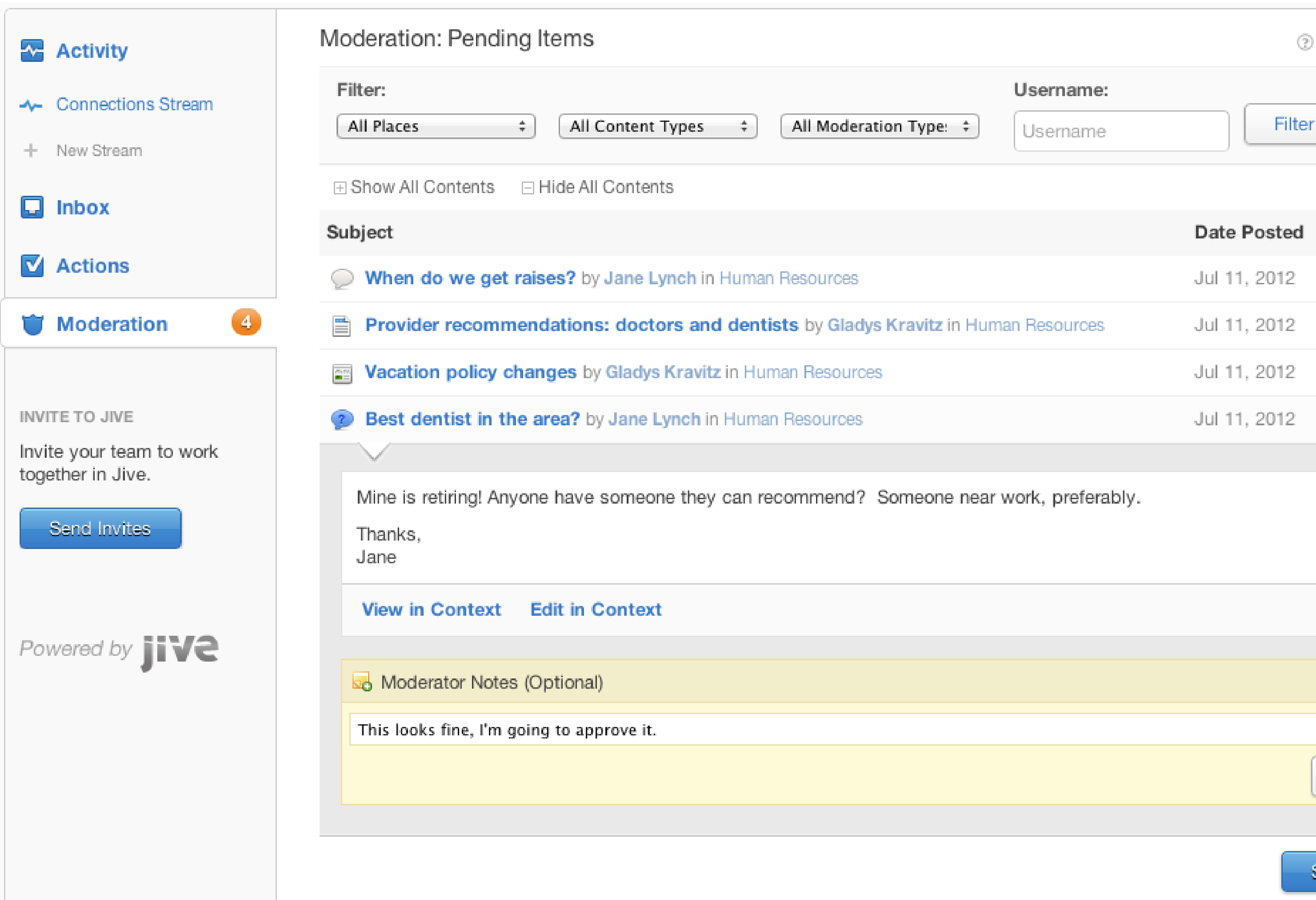
If you are a moderator for a place, you have access to a list of requests for moderation. You can view and accept or reject the content items which were sent for moderation.

In places where content moderation is enabled, the author of a piece of content sees 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 is sent to the Moderation queue for approval or rejection. Note that the author can still access the submitted content by going to **Content** > **Drafts** , where they can continue to make changes. As a moderator, you see only one item to moderate, no matter how many changes the author makes.



If there is more than one item awaiting moderation, you see a list in your Moderation queue in Inbox. For example, the list may contain 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 the community administrator. The following example shows a variety of items awaiting moderation:



Notice that you can filter the listed content. That can be helpful when you've got a very long list.

To moderate a content item, click on an item and make a decision to:

- **Approve the content**. This publishes the content in the community. You no longer see the item in your moderation queue.
- **Edit the content.** The content editor opens for you to make changes.
- **Reject the content.** This makes the content invisible to users. If you (or another moderator) reject the content, its author is notified via email. You can edit the template content of this email, as described in Editing email notification templates on page 202.

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 or 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. Note that all social groups are contained by the root space, so you see content items from groups on this page as well.

- **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.

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.
3. Under **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 442.

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 434.

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. For more information, see Setting up global content moderation on page 448.

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 Reviewing user-uploaded avatars on page 454.

Reviewing user-uploaded avatars

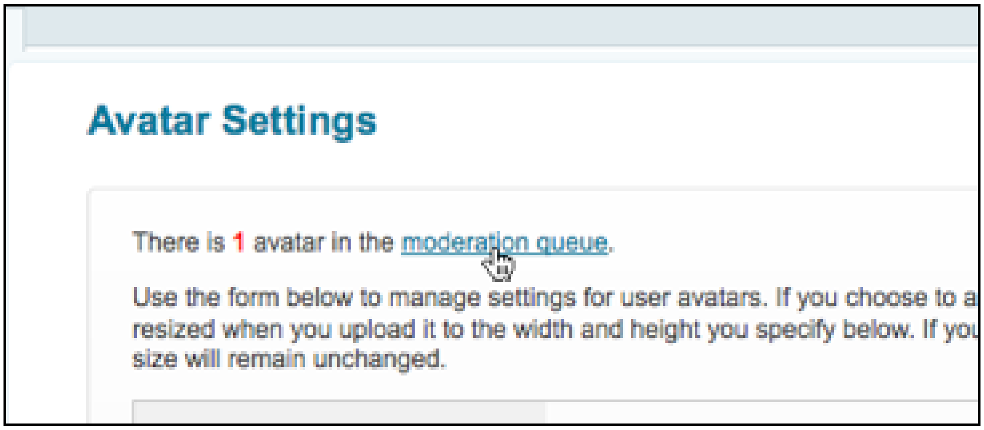
When you choose to have avatars moderated, a user uploading an avatar is notified by the interface that their avatar choice is pending approval. Once approved, the avatar becomes available for the user to designate it as their primary avatar.

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:

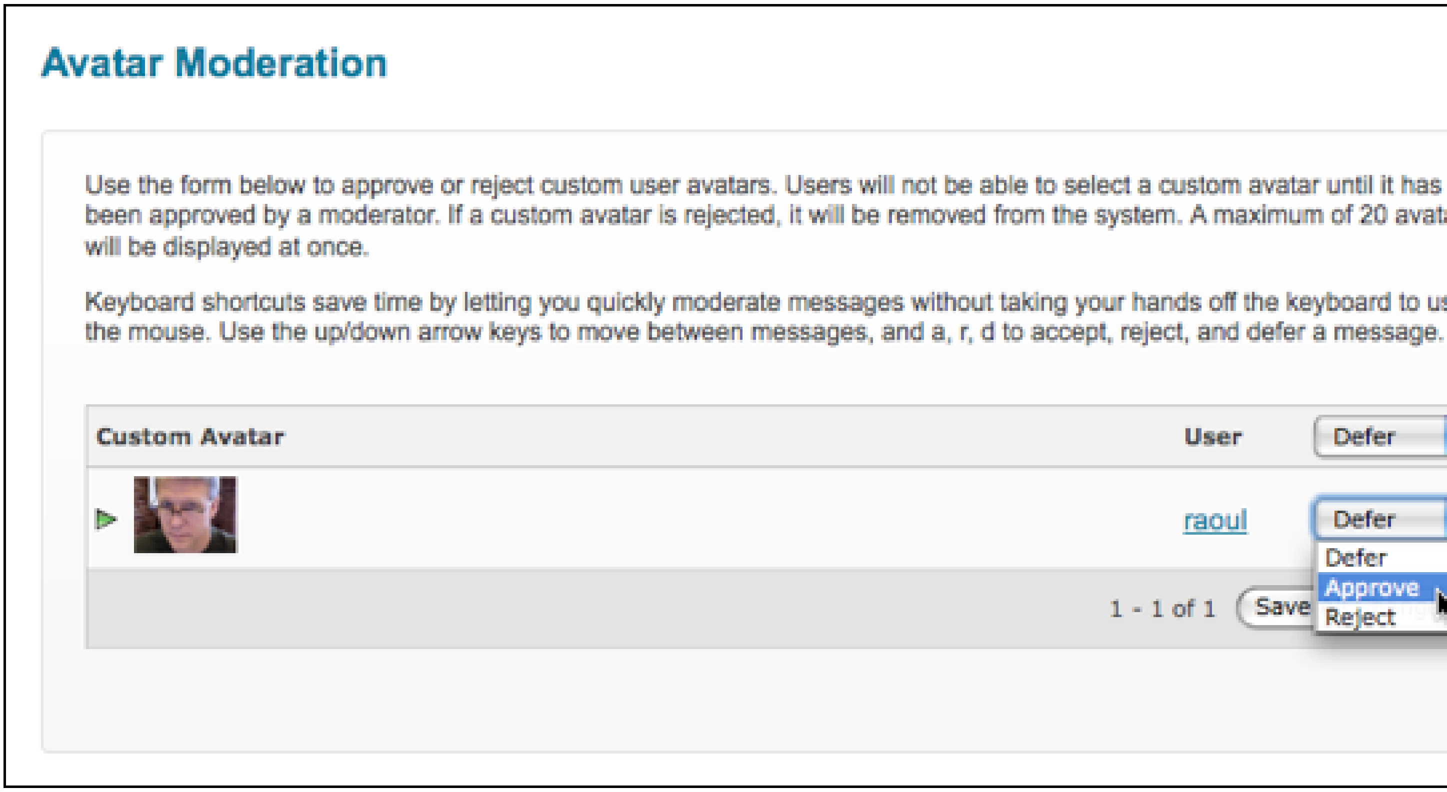
1. In the Admin Console, go to **People** > **Settings** > **Avatar Settings** .
2. Click **Moderation queue** to see the avatars which must be reviewed.



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 or a Jive Community) 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.

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 446.

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 442

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 155.

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** .

For information, see Moderation rules and notification hierarchy on page 442 and Moderation inheritance in groups and spaces on page 446 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 Reviewing content moderation requests on page 450.

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.

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:

- **Advanced Admin Console** > **System** > **Management** > **Audit Log Viewer**
- **Admin Console** > **Reports** > **Audit Log**

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 user licenses

You can check the overall number of user licenses on the reports page and use the CSV download to check which user accounts are counted towards licenses.

Fastpath:

- **Admin Console** > **Reports** > **License Usage**
- **Advanced Admin Console** > **System** > **Management** > **License Usage**

How licenses are counted

License metering is the point of reference for measuring and billing for registered users in the Jive platform. Registered users are measured by the count of users who have logged in at least once.

- Licenses are counted only for **registered visible active user accounts with at least one login**.
- Deactivated users are not included in the licensing count.
- External contributors are not included in the licensing count.
- System service accounts are not included in the licensing count.

For more information on the account types, see User account characteristics and groups on page 423.

Downloading report CSV

The License Usage report is available in the Admin Console.

Only community managers with the Manage System, Manage community, or Full access permission can view and access the report.

The license count is available immediately on the **License Usage** page but the report CSV with extended data is generated by request. The generated file is available until you (or another administrator) regenerate it. Thus, even if the report is available for download we recommend to regenerate the report to get the latest data.

To check the number of used licenses:

1. Go to the report page:
   - **Admin Console** > **Reports** > **License Usage**
   - **Advanced Admin Console** > **System** > **Management** > **License Usage**

The license count is immediately available in **Current License Usage**.

Note: Even if the report is available for download we recommend to regenerate the report to get the latest data.

To download a license usage report in the CSV format:

1. On the **License Usage** page, select which fields you want to include in the report:

Include additional profile fields check box	Report content
Cleared	Only the fields pertinent to license counting.
Selected	The full list of profile fields.

2. Click **Re-generate CSV Report** wait for the report file to be generated.

   Depending on the size of your community and the report contents, this may take up from several seconds to several minutes. Once the report is ready, the **Download Last CSV Report** button appears on the page. Note that this button is unavailable while the report is generated even if another administrator started the regeneration process.

3. Click **Download Last CSV Report** and save the generated file to your machine.

The report in the CSV format is downloaded to your machine.

Report contents

Reports are downloaded in CSV format. Each report includes details that allow you to determine which user accounts have active licenses and who owns these accounts. With this report, you can check, for example, if a particular user has an active license.

This report includes the profile fields which are defined for your community. Depending on the selection, you can download:

- *Basic report* that includes only the fields pertinent to license counting when the **Include additional profile fields** check box cleared.
- *Extended report* that includes the full list of the profile fields including the custom fields when the **Include additional profile fields** check box selected.

All date and time references are provided in the server time zone. For more information about account types and statuses, see User account characteristics and groups on page 423 and User account statuses on page 426.

Report fields

The following table lists the fields that can be included in the report. If your community has custom account fields configured they are listed after the main list.

Field	Description	Example	Basic	Extended
`License Use`	License usage by this user account. Possible values are `YES` and `NO`.	`YES`		
`User ID`	User account ID.	`2004`		
`Username`	Username of the user.	`a.bollen@community.com`		

Field	Description	Example	Basic	Extended
Account Enabled	Indicates if the user account is activated (enabled) or deactivated. Possible values are YES and NO.	YES		
Account Type	User account type. For more information, see User account characteristics and groups on page 423.	REGULAR		
Name	User full name.	Anne Bollen		
First Name	User first name.	Anne		
Last Name	User last name.	Bollen		
Email	The main email of the user.	a.bollen@community.com		
Last Logged In	Human readable date and time of the last user login, in the MM/DD/YYYY HH:MM format. If this field is empty the user never logged in to the community.	8/28/2019 19:08		
Member Since	Human readable date and time when the user account was created, in the MM/DD/YYYY HH:MM format.	6/16/2019 08:03		
Federated	Indicates if the user account is federated or non-federated. Possible values are YES and No.	NO		
Visible	User account visibility on the front-end UI. Possible values are YES and No. For more information, see User account characteristics and groups on page 423.	YES		
Status	User account status. For more information, see User account statuses on page 426.	registered		
Modification Date	Human readable date and time when the user account information has been updated, in the MM/DD/YYYY HH:MM format.	12/1/2020 20:03		
Initial Login Date	The date and time when the user logged in for the first time, in the MM/DD/YYYY HH:MM format.	8/1/2020 12:34		
Last Profile Update	Human readable date and time when the user account was last modified, in the DD/MM/YYYY HH:MM format.	4/24/2020 12:54		

Field	Description	Example	Basic	Extended
Avatar	Indicates if the user account has one or more avatar images added. Possible values are YES and No.	YES		
Profile Image	Indicates if the user account has one or more profile images added. Possible values are YES and No.	YES		
Title	Job title of the user.	Manager		
Department	Department of the user.	Marketing		
Mobile	Mobile phone number of the user.	+1-541-754-3010		
Biography	Biography as shared by the user.			
Company	Company the user is working at.			
Address	Contact address of the user.			
Phone	Main phone number of the user.			
Alternate email	Additional email of the user.			
Location	Location of the user in a short form. For example, this can show the user's town and country.			
Availability	Availability as set by the user.			
Facebook	Facebook account of the user.			
Hire Date	Human-readable date when the user has been hired.			
Home Phone	Home phone number of the user.			
Home Address	Home address of the user.			
Twitter	Twitter account of the user.			
LinkedIn	LinkedIn account of the user.			

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: Advanced 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. For more information, see Getting started with the new Jive Support Portal on Worx.

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 Advanced 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.