

Jive Interactive Intranet

## Cloud User Guide

Using a Jive Community

# Notices

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For details, see the following topics:

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

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# Aurea global support

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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

## Using a Jive community

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*Here you can find information about navigating and using your community.*

For details, see the following topics:

- [Using community from mobile browsers](#)
- [Using News](#)
- [Creating custom streams](#)
- [Using Your View](#)
- [Finding people, places, and content](#)
- [Using social groups](#)
- [Using content](#)
- [Using projects and tasks](#)
- [Public and private communications](#)
- [Using Jive Apps](#)
- [Using external groups](#)

### Using community from mobile browsers

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

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

The following options are available from a mobile browser:

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

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**Read and interact with your streams and Inbox** You can browse through and interact with your streams, and read and respond to your Inbox items.

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

### Known issues

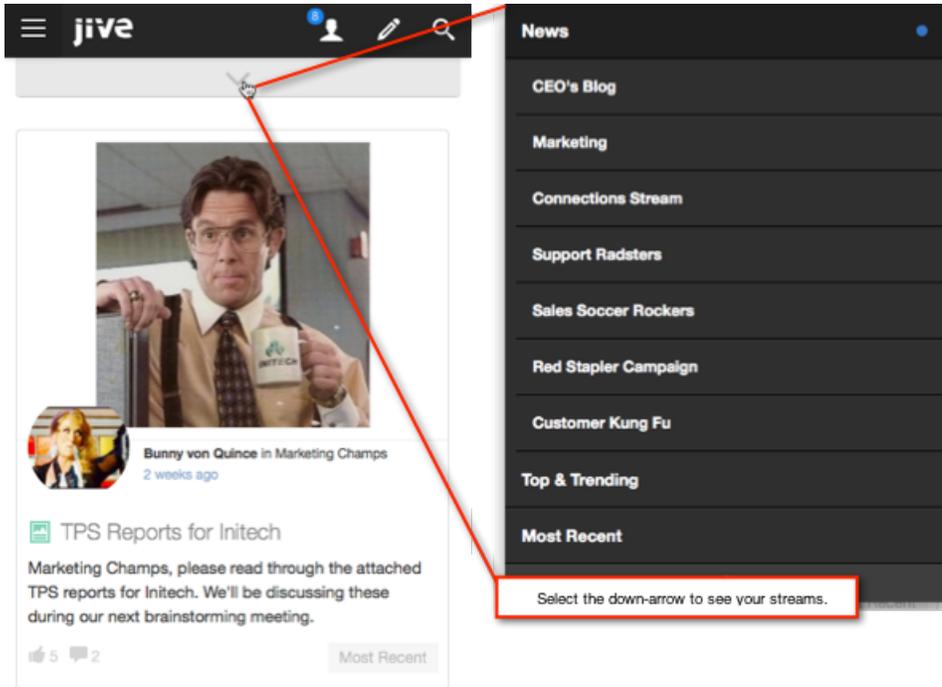
- The mobile browser does not work on Blackberry devices.
- Older Android browsers struggle with content creation. You can resolve this by upgrading your Android operating system and using Chrome to browse your community.

## Quick tour from a mobile browser

Here's a quick visual tour of navigating your community from the built-in browser on your mobile device (or a narrow desktop screen).

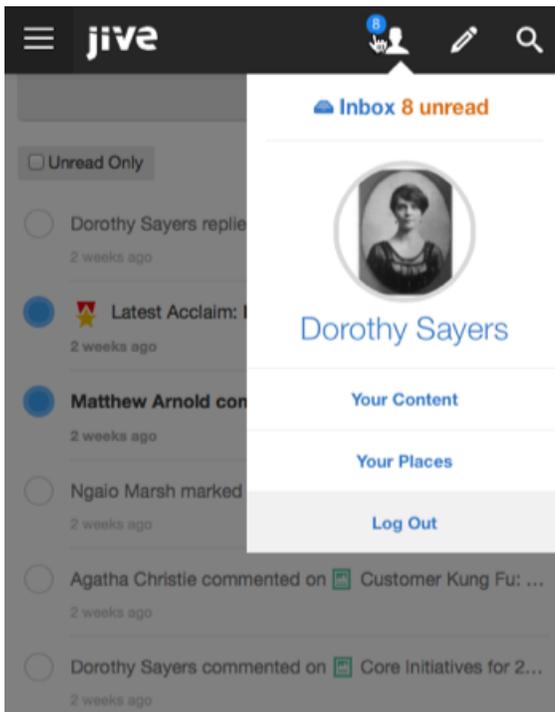
If you're totally new to Jive, refer to [Getting started](#) for a walk through the key tasks, such as posting a status update, connecting with colleagues, and joining a group. Otherwise, from your mobile device, enter the URL of your community into the built-in browser.

See what's new



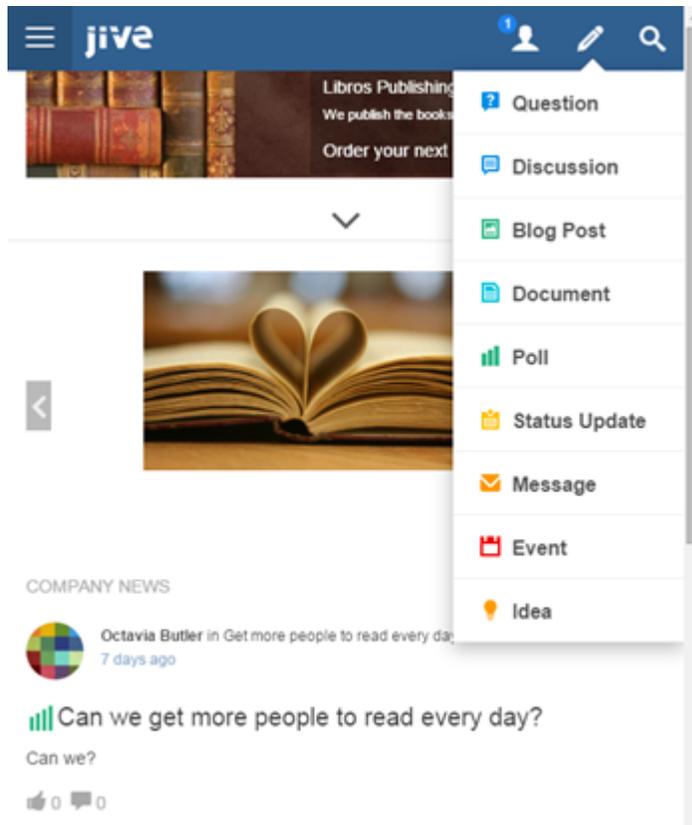
When you first log in using a mobile browser, you see the latest posting from News, as you see to the right. To see your streams, tap the down-arrow. You can go to any of them by tapping one.

Check out your Inbox



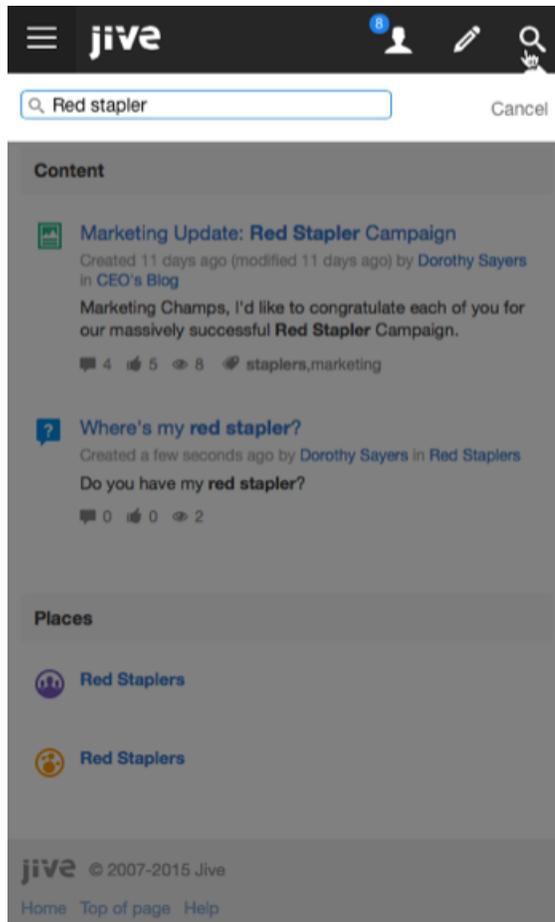
If you see a blue alert next to the person icon, you have something unread in your Inbox. You could also go to Your Content and Your Places from here. You could also log out from the community if required.

## Create content



You can create all kinds of content right from the mobile browser. You can publish it for specific people, in a place, or the entire community.

Find what you're looking for



You can search from your mobile browser by tapping the magnifying glass in the upper right corner. After you enter your search terms, click the down-arrow to filter by Content, People, or Places, and the time period of the last modification. Note that we decided that a narrow-screen search should be just about search, so you won't see Bookmarks or Recently Viewed Content taking up precious real estate here.

## Using News

The News page gives you an account of what is going on in your community. It features a variety of streams and tiles designed to bring you the latest news and information.

## Overview of News

*The News page is the central place for you to see what's happening in the community. The News page features a variety of streams designed to direct you to content, people, and places that pertain directly to you. You can*

also see your *Following stream*, any custom streams you have created, and the *All Activity streams*, which show recent activity from all over the community that you have permission to see.

You can see these streams individually by clicking the link to a stream in the stream menu at the top of the page and scrolling down the page, or you can use the main News page to overview the latest items in each stream in a combined block view. Each block has a header that shows what stream the item came from.

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**Note:** The News page responds to browser width by adjusting to fit all your streams so your main navigation menu may differ slightly from browser to browser or from screenshots in this Help. For example, you may see your News subscription streams listed individually or collapsed into a drop-down menu.

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You can pin any of the streams listed on your News page to either the News or Home button in the main menu, depending on how your community manager has set up the main navigation menu in your community. Just click the pin icon from the desired stream's page, and when you click Home or News from anywhere in the application, you are taken to the page you pinned. For more information, see [Pinning pages for quick access](#).

The News page also features a variety of tiles to help you find important people, places, and content quickly. The Trending Content and Trending People tiles are included by default but may be removed by your community manager.

Here's an overview of what you can see on the News page. For a quick visual tour of the News interface, see [News page interface](#) on page 15.

**News  
(top-level  
view)**

The News view aggregates and displays content posted in your News and Following streams. However, unlike your streams, the News page does not show content updates and comments in a stream view. Content that gets updated or interacted with is not moved to the top of the News view: this view shows *only new things*.

Content is pulled in and displayed in the News view in the order in which your streams are displayed to the right of News in the stream menu. Duplicated content is removed if it's already being pulled in from a higher-order stream. The content you've read (by clicking through to it either from your desktop or a mobile version of Jive) stays in News for two days before going away. The content you haven't yet read stays for ten days. Because the News streams are designed just for you, you won't see the same content pulled into the News view that other users see.

**News streams**

These are the streams you see listed when you expand the menu under News. These streams are created and managed by your community manager or people with Manage News Streams permissions. Because these streams are designed just for you, you may not see the same News streams or the same content in them that others see. For more information, see [Overview of News streams](#)

**All Activity: Top & Trending stream** This stream shows you the trending content in your community to get you a feel for what's happening right now.

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**Note:** Content items can be excluded from the **Top & Trending** stream. For more information, see [Removing content items from Top and Trending](#) on page 76.

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**All Activity: Most Recent stream** This stream shows you all community updates that you have permission to see as they are posted in real time. Scrolling through this stream can be useful for adding new people and content to your Following or custom streams.

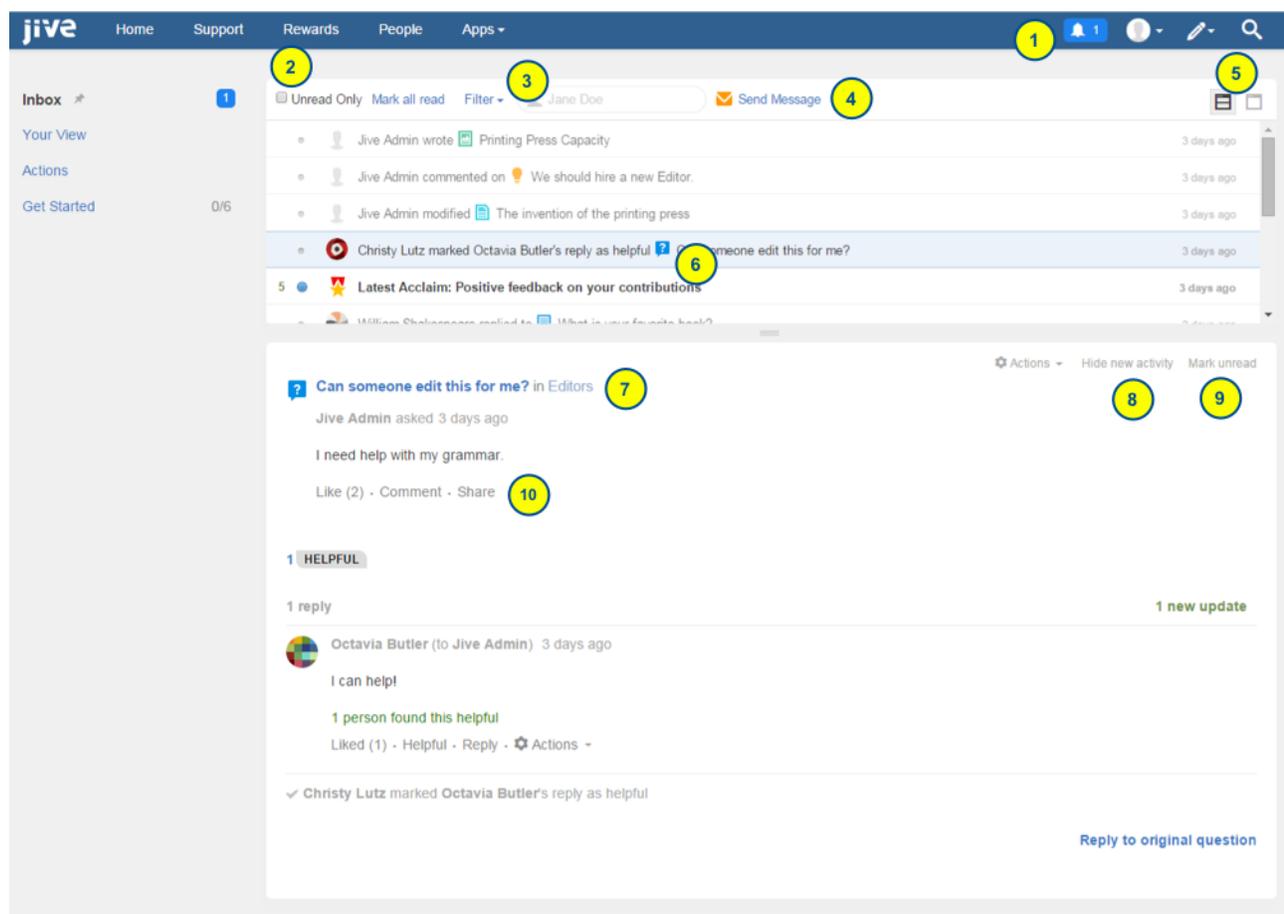
**Following** When you start following people, places, and content items, they are automatically added to this stream. Use this stream if you want to check in throughout the day but not create a lot of custom streams. This stream is included for you by default, and you can add to or delete content, people, and places from it.

**Your custom streams** If you've created any custom streams, you can see those listed to the right of Following. Custom streams can be a great way to keep up with the content, people, and places that matter most to you in your community. For some examples of custom streams which you might want to create for yourself, see [Examples of custom streams](#) on page 20.

## News page interface

Here you can find the visual overview of a News page.

Figure 1: How News page looks



- |   |   |
|---|---|
| 1 Click the unread message indicator to access your inbox.              | 6 Check out the different icons for message types.  |
| 2 View only unread items.   | 7 Click the content title to view the published version of the content.                   |
| 3 Filter by mentions, messages, or shares, or type a name to filter by. | 8 Click <b>Hide new activity</b> to stop receiving updates on that content in your Inbox. |
| 4 Message someone directly from your Inbox.                             | 9 Mark a message <b>unread</b> to remind you to revisit it later.                         |
| 5 Toggle between preview mode and list mode.                            | 10 Like, comment, or share content from the preview pane.                                 |

1. Listed first are any streams your community manager has curated for you.
2. The **All Activity** stream is a great way to see what's happening right now.
3. Activity indicator dots appear next to streams that have a new activity in them since you last checked.
4. Also listed here are streams that you create yourself to focus on the things you want to see.
5. Banner images might be pictures, or they might link to helpful places.

6. **Top & Trending** shows you the activity getting a lot of attention right now.
7. See how many likes and comments have been given to something right from the card view.
8. Following shows you the content generated by people, places, and content you are following. You can add to or remove items from this stream.

## Overview of News streams

News streams that are displayed on the News page are configured for you by your community manager and are designed to bring you the latest news from your organization, department, team, or product. Additionally, you can create your own custom streams to tailor the news.

Click **News** to find your News streams if they've been set up.

Because they are designed just for you, you may not see the same News streams or the same content in them that others see. For example, everyone in your community may see the CEO's Blog stream that shows the latest blog posts from your organization's CEO. However, only people in the Marketing department may have a stream called Marketing News that shows activity from the Marketing space.

Also, you might have a News stream based on your role in the community. For example, let's say everyone has a stream called What's New, but what is displayed there differs depending on the user's role. Or customers might see content pulled from the Special Promotions blog in their What's New stream, but vendors might see content pulled from the New Solutions group.

For more information about streams and how they work, see [Overview of streams](#).

## Creating custom streams

You can create your own custom streams to help you keep up with the content, people, and places that matter most to you in your community.

## Overview of streams

A stream shows you real-time updates of activity as people interact with content, people, and places in the community.

You can see streams on the News page and the Activity page of any place. Streams are updated when someone creates a document, replies to a blog post, posts a status update, and so on.

## Examples of activities which update streams

Here are some examples of activities that trigger new stream items for people, places, and content that you're following in a stream:

- Content: Someone modifies the content item, for example, edits, comments on, or replies to it.
- People: Someone posts a status update, creates a content item, or comments on a content item.
- Places: Someone updates content in the place, for example, publishes a new document, edits a blog post, shares content with a place, or comments on a document that lives in the place.
- Tags: Someone creates or modifies an item with a tag you're following in the stream, or adds the tag to a content item.

## Tracking new activity in streams

Here are some ways you can track new activity in your streams:

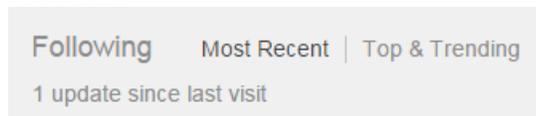
### Activity indicators

When there is new activity in your streams, such as likes, comments, edits, or new content, you can see an indicator dot next to the stream name on your News page. If you hover over the indicator, you can see the count of new activity for that stream since you last viewed it.



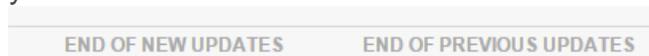
### Stream views

When you select a stream, you are viewing all activity, with the **Most Recent** content listed first. If you want to view only the content you are following in that stream, you should select **Top & Trending** to sort activity by the most active content since you last viewed the stream.



### Update lines

As you are scrolling through your stream, you can see the **End of New Updates** line, so you know when you've seen all the new activity for that stream. If you continue scrolling, you can see the **End of Previous Updates** line that shows you the updates from last time you checked.



## Streams to follow

Here are some streams you can view to follow activity in your community:

### All Activity: Most Recent stream

You can see all public activity that you have permission to see in this stream.

### Custom streams

You can create your own custom streams that show only the people, places, and content items you select.

For more information, see [Creating custom streams](#) on page 19.

### People and Place activity streams

Each person and place in the community has an activity stream. You can see yours under your profile, and places have a place-specific stream that shows up on place pages.

### News streams

News streams are those listed to the left of your custom streams. They were created by your community manager to help you see important content. For more information about how these streams work, see [Overview of News](#) and [Overview of News streams](#).

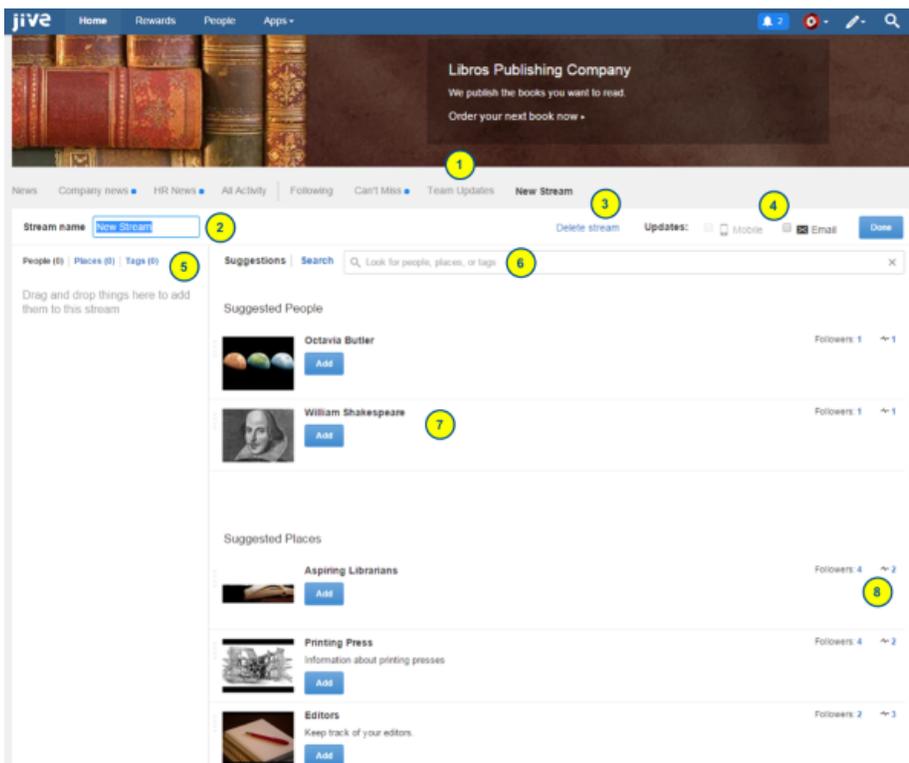
### Notifications about streams

You can also select your notification preferences by clicking **Your avatar > Preferences** .

## Custom streams interface

Here you can find the News page details.

Figure 2: How a custom stream page looks



1. See all your custom streams.
2. Give your stream a unique name.
3. Delete your stream, if you no longer need it.

4. Receive email or mobile updates about your streams.
5. View people, places, or tags you've added to a custom stream.
6. Search for more people, places, or tags to add.
7. Add people, places, or tags from the suggested lists.
8. See how many of your streams a person or a place is in.

## Creating custom streams

You can create your own customized streams if available in your community.

To create a custom stream:

1. On the News or Home page, click  to the right of the streams.  
You can see a two-column layout with suggested stream content on the right.
2. In **Stream name**, enter a name for this stream, for example, Water Cooler, New Products, or Team Activity.
3. Drag and drop items from the **Suggested People, Places, and Tags** in the right column to the left column, or use the Search box to find specific items you want to follow in this stream. For more information about how to find and follow useful things, see [Tips for finding things to follow](#) on page 22 or [Following tags](#) on page 52.
4. If you want to receive a notification every time there is a new item in this stream, select **Mobile** or **Email** (or both) under **Updates** at the top of the page.
  - The option to change your email notifications preferences may be unavailable in your community. For more information, see [Choosing between email and stream notifications](#).
  - We strongly recommend leaving **Email** cleared, which is the default; otherwise, your email notifications could get overwhelming pretty quickly.
  - Mobile notifications go to the Jive Mobile or Jive Daily: Intranet on the go app if you have it installed on your Android or iOS device. If you don't have one of these apps, mobile notifications don't have any effect.
5. To save this new stream, click **Done**.

You can add to, edit, or delete this stream any time you want. For more information, see [Updating custom streams](#) on page 23 and [Editing custom streams](#) on page 24.

## Examples of custom streams

Here are some examples of custom streams you might create, depending on your role in the organization or how you want to check in on community activity throughout the day.

### Strategies for creating streams

You should consider creating and organizing your custom streams based on the following strategies. You can try using a combination of these to develop the best approach for your unique needs.

- My stream** Create a stream where you follow yourself. This can help you get to your most-used items quickly.
- Priority streams** You can create streams for immediate, soon, and later items. You could check Immediate often and Soon occasionally. In Immediate, follow your high-priority people, places, and content items. In Soon, follow your less urgent people, places, and content items. This kind of organization can be good if you like to read some things later, but don't want to miss your high-priority things as they are posted.
- Content streams** You can create an Blog stream where you follow the blogs of the CEO, CTO, and VP of your department. For more information, see [Creating custom blog stream](#) on page 105.
- Can't miss** This stream can be convenient if you're in and out of the community a lot, and especially if you're out of the office for a few days. Add to this stream only critical items that you can't miss. Then, make sure to select **Email** or **Mobile** from **Updates** so that you receive notifications when activity happens in this stream.

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**Note:** The option to change your email notifications preferences may be unavailable in your community.

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- Team and Product streams** To these streams you can add the people you work with, the content you all are working on, and the places where your team most frequently posts. Or, create one good Team and Product stream to check throughout the day for updates from your team and the product you're working on.
- Following stream** When you start following people, places, and content items, they are automatically added to this stream. You can use this stream if you want to check in throughout the day but not create a lot of custom streams. This stream is included for you by default, and you can add to or delete content, people, and places from it.
- Tag streams** When you follow tags, you follow updates of the content which is marked with this tag. You can create an entire stream for one tag, or add tags to optimize your existing streams. If you're a QA Engineer, you might add the **#test** tag to your stream that already follows the QA Group.

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## Examples for creating custom streams

Here are more specific streams that you might create, depending on your role in the organization.

If you work in the Engineering department, you can create the following new streams:

- **Email Watches:** Follow critical items here and select **Email** or **Mobile** from **Updates** so that you receive notifications when activity happens in this stream. Use this stream wisely so that you don't create an email nightmare for yourself.

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**Note:** The option to change your email notifications preferences may be greyed-out and unavailable in your community.

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**Note:** You can also select your notification preferences by clicking **your avatar > Preferences** .

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- **Product A:** Follow everything related to one of the products you're working on.
- **Product B:** Follow everything related to another product you're working on.
- **Team:** Follow everyone on your team so that you stay current with their activities.
- **Research:** Follow things related to your next big product idea.
- **Awesome Blogs:** Follow blogs that you like.
- **Water Cooler:** Follow fun people, content items that are amusing, and community places where people organize social events.

If you work in the Accounting department, you can create these streams:

- **Customer Account A:** Follow everything related to one of the customer accounts you're working on.
- **Customer Account B:** Follow everything related to another customer account you're working on.
- **Team:** Follow everyone on your team so that you stay current with their activities.
- **Sarbanes-Oxley:** Follow people, places, and content items in your community related to Sarbanes-Oxley, so that you don't miss important new regulations or processes.
- **Latest Wins:** Follow the place where your latest wins are reported. You might also follow the VP of Sales and the blogs of Sales team members here.
- **Email Watches:** Follow critical items here and select **Email** or **Mobile** from **Updates** so that you receive notifications when activity happens in this stream. Use this stream wisely so that you don't create an email nightmare for yourself.

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**Note:** The option to change your email notifications preferences may be greyed-out and unavailable in your community.

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**Note:** You can also select your notification preferences by clicking **your avatar > Preferences** .

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If you work in the Sales department, you can create these streams:

- My Region: Follow everyone working in your region, plus all of the places you and they post most often.
- Marketing for Product A: Follow the people, places, and content related to the marketing of Product A.
- Customer Account B: Follow the people, places, and content related to the marketing of Product B.
- Exec Blogs: Follow the blogs of the CEO, CMO, SVP of Sales, and other leaders who matter most to you.
- Can't Miss: Follow critical items here and then make sure to select **Email** or **Mobile** from **Updates** so that you receive notifications when activity happens in this stream.

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**Note:** The option to change your email notifications preferences may be greyed-out and unavailable in your community.

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**Note:** You can also select your notification preferences by clicking **your avatar > Preferences** .

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- Comic Relief: Follow entertaining people and places where people post funny stories and videos.

## Tips for finding things to follow

Here are some tips for finding useful activity to follow in your community.

- Browse the content, people, or places that your co-worker or someone with similar interests follows by clicking **Places** or **People** on their profile page. This way you can quickly find things and people you should also follow.

It can also be helpful to look at their bookmarks. For more information about bookmarks, see [Using bookmarks](#) on page 52.

- Read the **All Activity: Top & Trending** stream on the News page to see what other people are excited about.
- Browse for items using the **People** browse in the main navigation menu or **Your Content** or **Your Places** in your user profile menu in the upper right.

Once you're browsing, type keywords into the filter box to narrow your results. For more information about filtering, see [Browse and filter content, people, and places](#) on page 47.

- Use Search to find things that interest you. To learn how search works, see [Using Spotlight search](#) on page 40.
- Try following a tag. Note that this can be tricky because people from all over the community assign tags, so you may not know how other people are tagging content, places, and people. For more information, see [Following tags](#) on page 52.

---

## Following people, places, and content

There are several ways to start following a piece of content, a person, or a place in the community. Here you can find how to start and stop following items.

### Starting following people, places, or pieces of content

To start following people, places, or pieces of content:

- Use people hover cards. From any stream you're reading, hover your mouse over a person's name or avatar, or the name of a place, and click **Follow**. You can then select the stream in which you want to follow the person or place.
- Use the Browse menus. Click **People** from the main navigation menu (may also be nested under the Browse button), or click **Your Content** or **Your Places** from the menu under your avatar, then browse for things to follow. You can also check the **Recommended** tab to see recommendations based on your individual activity and connections in the community. When you see an item you want to follow, click on its gear icon, and then **Follow**. Then select the stream in which you want to follow the content item, person, or place.
- Use the Search feature. Search for keywords of things that might interest you. When you find something you want to follow, click on the item. From there, click **Actions > Follow**. Then select the stream in which you want to follow the content item, person, or place.

### Stopping following people, places, or pieces of content

To stop following something, do one of the following:

- Go to the item, then click **Actions** and clear the **Following** check box. You can also clear check boxes for the streams from which you want to stop following the person, place, or content item. You will no longer see updates for that person, place, or content item in those streams. Those updates can still appear in the Most Recent stream, however, because that stream shows all public activity in the community.
- Go to the stream and click the edit icon above the stream. From here, click  next to the items in the left column that you want to remove from your stream.

## Updating custom streams

Quickly add content, people, and places to any of your custom streams and your Following stream using any of these methods.

---

**Tip:** If you are already following something in a stream, you can see the notation **Following in**. If you're not following it, it shows **Follow**.

---

## Starting following people, places, or pieces of content

To start following people, places, or pieces of content:

- Use people hover cards. From any stream you're reading, hover your mouse over a person's name or avatar, or the name of a place, and click **Follow**. You can then select the stream in which you want to follow the person or place.
- Use the Browse menus. Click **People** from the main navigation menu (may also be nested under the Browse button), or click **Your Content** or **Your Places** from the menu under your avatar, then browse for things to follow. You can also check the **Recommended** tab to see recommendations based on your individual activity and connections in the community. When you see an item you want to follow, click on its gear icon, and then **Follow**. Then select the stream in which you want to follow the content item, person, or place.
- Use the Search feature. Search for keywords of things that might interest you. When you find something you want to follow, click on the item. From there, click **Actions > Follow**. Then select the stream in which you want to follow the content item, person, or place.

## Editing custom streams

As your projects and interests change over time, so should your custom streams. Edit them to match what you need from the community at any given time. You can also delete a custom stream.

Your streams should change over time as you add and remove people, places, and content from them, depending on what you're working on and how your team, products, and tasks change over time. From any of your streams, you can hover over a place name or person's name and select **Following > Stop Following** or select the streams you want to follow it in. For content items, click the name of the item, and then select **Actions > Follow** and select or unselect the streams you'll see it in.

To edit a stream:

1. Select the stream and click .
2. Drag and drop items into the stream to follow them.
3. Click  to remove items from the stream.
4. When you're finished, click **Done**.

To delete a stream:

- Select the stream, then click  and confirm deletion.

## Items that appear in streams

You can review your stream content and understand why you are seeing something in a stream with these checks.

Here are some examples of activities that trigger new stream items for people, places, and content that you're following in a stream:

- Content: Someone modifies the content item, for example, edits, comments on, or replies to it.
- People: Someone posts a status update, creates a content item, or comments on a content item.
- Places: Someone updates content in the place, for example, publishes a new document, edits a blog post, shares content with a place, or comments on a document that lives in the place.
- Tags: Someone creates or modifies an item with a tag you're following in the stream, or adds the tag to a content item.

If you are seeing something in your stream that you don't think you are following, you should check if you follow:

- The person who posted the item?
- The place where the item was posted?
- This content item?

If you discover that you are following the person, place, or content item in your Following stream or any of your custom streams, but you don't want to, go to or hover over the person, place, or content and click **Stop Following**.

Your News streams (those listed when you click News) were created by other people, so you have to ask them about any unexpected content you see in your News streams.

A common question is why you're getting email notifications on activity you're not interested in. Note that each of your custom streams (those listed to the right of Following) has a configuration setting to enable or disable email notifications. For more information, see [Choosing between email and stream notifications](#).

## Choosing between email and stream notifications

You can receive notifications in Inbox and on email. Here you can find details about choosing when and how you want to be notified about new activity in your streams and when you don't.

### Stream and Inbox notifications

You can keep track of activity in your community without ever leaving the community page through notifications in your Inbox and through streams.

**Inbox notifications** When you collaborate on content in your community, you're automatically notified in your Inbox when updates are made to that content.

**Stream notifications** If there is content that you want to watch but have not directly collaborated on, you can follow it in a stream. When there is new activity in your streams, such as likes, comments, edits or new content, you can see an indicator dot next to the stream name on your News or Home page. If you hover over the indicator, you can see a count of new activity for that stream since you last viewed it.



---

**Tip:** Relying on these notifications can save you time and cut down on your emails.

---

### Email notifications

If you want to receive email notifications, do so prudently. You may find that you rapidly accumulate hundreds of email messages in a busy community, since you may get an email every time that stream is updated.

To receive emails in addition to Inbox and stream notifications,

1. Go to **your avatar > Preferences** .
2. Select **Yes** for **Receive email or mobile notifications when there is activity in the community?**.
3. Select **Email** next to your Inbox or streams.

---

**Note:** The option to change your email notification preferences may be unavailable in your community.

---

### Examples of email notification strategies

Here are some email notification strategies:

---

**Note:** The options to change your email and Inbox notification preferences may be unavailable in your community.

---

- Not receive any email notifications: You won't receive notifications on email. All update notifications you will receive in the community.
  - On your **Preferences** page, select **No** in **Receive email or mobile notifications when there is activity in the community?**
- Receive emails for the News Digest only. You can change the frequency that you receive this digest from the drop-down list. For more information, see [News Digest](#).
  - On your **Preferences** page, select **Yes** in **Receive notifications?**, and select **Email** for **News Digest**.
- Create an Email Watches stream and follow only critical items. This stream can be helpful when you're away from the community for a few days or if you want to watch something that you haven't directly collaborated on. For more information, see [Creating custom streams](#) on page 19.
  - On your **Preferences** page, select **Yes** in **Receive email or mobile notifications when there is activity in the community?** and select **Email** for that stream.
- Change the frequency of your email notifications. Instead of receiving an email for every update, you can receive a digest of updates.
  - On your **Preferences** page, select **Yes** in **Receive email or mobile notifications when there is activity in the community?** and select one of the summary options from the list next to your Inbox and streams.

## Customizing notifications

You can set notifications for your Inbox and any of your streams so that you receive an email or mobile app notification each time a person, place, or item posts an update or you have Inbox activity.

There are a few ways to set your notifications.

---

**Remember:** You can choose the frequency of these notifications from the drop-down list next to each Inbox or stream.

---

### When you're viewing or editing a stream

1. On the News (or Home) page, select the stream and click .
2. Select **Mobile**, or **Email**, or both from **Updates** at the top of the page.
3. Click **Done**.

---

**Note:** Mobile notifications appear in the  or Jive Mobile app if you have it installed on your Android or iOS device. If you don't have one of these apps, mobile notifications don't have any effect.

---

## From the unsubscribe link in the email

You can click the **unsubscribe** link in an email so you will no longer receive notifications. It switches the **Receive notifications?** option to **No** on your **Preferences** page.

## From your Preferences page

1. Go to **Your avatar > Preferences** .
2. Select **Yes** in **Receive email or mobile notifications when there is activity in the community?**.
3. Select **Email** or **Mobile** notifications for each stream and your Inbox, and select the frequency of notifications for each from the list.
4. Click **Save** when you're done.

---

**Caution:** When you select **All Activity**, you get an email every time that stream or Inbox is updated. We recommend leaving **Email** cleared or choosing one of the summary options; otherwise, your email notifications could get overwhelming.

---

For more information about notification settings, see [Notification Preferences reference](#) on page 28.

---

**Note:** The options to change your email and Inbox notification preferences may be unavailable in your community.

---

## Notification Preferences reference

Here you can find the description of preferences related to notifications about activities.

---

**Fastpath:** **You avatar > Preferences > General Preferences**

---

### Notification Preferences

- If you want to receive notifications on email or in the mobile app, you must set **Receive email or mobile notifications when there is activity in the community?** to **Yes**.
- If you want your email notifications to include the full text of the item you're being notified about, select **Include body of content in email**.

### Inbox Notifications

---

**Note:** The options to change your email and Inbox notification preferences may be unavailable in your community.

---

Notification for Inbox activity	When you select Email or Mobile
<b>Inbox: Activity</b>	Receive a notification when the content you created or participated in is updated.
<b>Inbox: Direct Social Actions</b>	Receive a notification when someone @mentions you, shares content with you, or sends you a message in the community. For more information about mentions, see <a href="#">Alerts for people, places, and content items</a> .
<b>Inbox: Alerts</b>	Receive a notification when you have a new task, a new follower, or a new skills endorsement.
<b>Inbox: Badges</b>	Receive a notification when you receive a new badge.
<b>Inbox: Moderation</b>	Receive a notification when you have content to moderate. This option is available if you're a content moderator.

## News & Stream Notifications

**Note:** The options to change your email and Inbox notification preferences may be unavailable in your community.

Notification for Inbox activity	When you select Email or Mobile
Custom streams created for you by community administrators	Receive a notification when a new activity is posted in custom streams created for you by your community administrators (if any).
<b>Following</b>	Receive a notification when a followed person, place, or item posts an update.
Custom streams	Receive a notification when a new activity is posted in custom streams you created for yourself (if any).
<b>News Digest</b>	Receive a summary of community news. For more information about the digest, see <a href="#">News Digest</a> .

## Using Your View

Your View lets you customize a page just for yourself, so that you can get to your most used items quickly.

You can change what you see from Your View whenever you want. For example, you might want to update Your View when you change projects or teams, or when you want to watch new things in your community.

- To go to Your View, click the  icon in the main navigation menu, and then click **Your View** in the left sidebar.

---

**Note:** You won't see Your View if your community manager has not enabled the feature.

---

## Setting up Your View as default on

Your View is pre-populated with a few tiles to get you started, but you can edit these or remove them altogether. You can also add new tiles that you select and configure to suit your specific needs.

Your View is your own page which you design and change for yourself, however and whenever you like.

- To go to Your View, click the  icon in the main navigation menu, and then click **Your View** in the left sidebar.

You can customize the Your View page with tiles. By default, you can see the following tiles in Your View:

- Frequently Viewed
- Latest Blog Posts (if blogs are enabled in your community)
- Trending Content
- Key Content and Places

To edit Your View:

1. Click **Edit page** at the upper right corner of the page to open it for editing.
2. To configure a tile, click the gear icon on them and change the tiles settings.
3. To move the tiles up and down on the page, click the up and down arrows on tiles.

---

To pin Your View to the  button:

- Click  next to **Your View** in the left sidebar.

Now, when you click the  button in the main navigation menu, you go right to Your View. This can be helpful if you design Your View with links to your most visited items.

## Adding tiles to Your View

You can add new tiles to Your View in a few steps.

Your View can contain tiles of several types. For more information on the tiles which you can use on here, see [Your View tile reference](#).

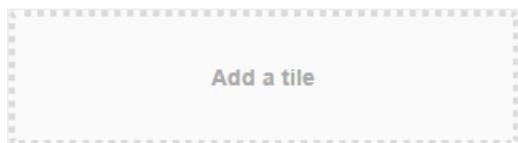
---

**Note:** The number of wide (that take 2/3 of the page) and custom (listed under the **External Add-ons** and **Custom Tiles** categories) tiles you can add to any Activity, Custom page or Your View is limited. For details, contact your system administrator.

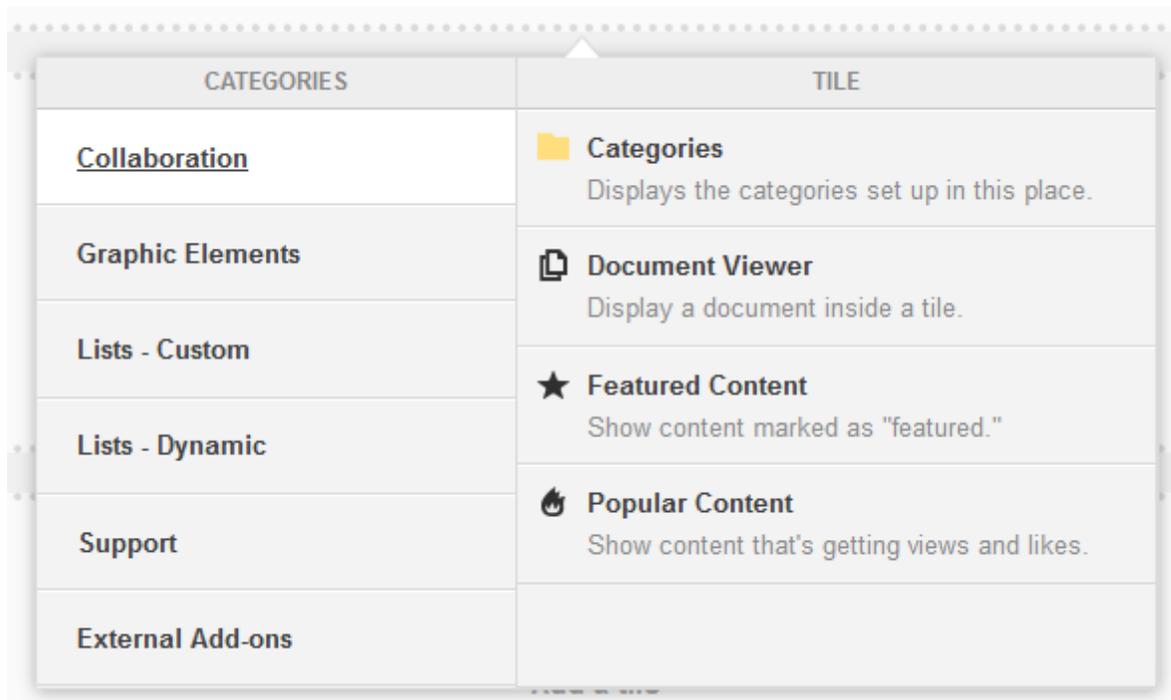
---

To add tiles to the Your View page:

1. Click the  icon in the main navigation menu.
2. Click **Your View** in the left sidebar to open the Your View page.
3. Click **Edit page** in the upper right corner to open the Your View page for editing.
4. Click **Add a tile**.



5. 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.

---

- 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.

- If required, adjust the tile position in the layout column by using the arrows in the upper right corner of the tile.
- Click **Save** to save the page changes.

With the changes saved, Your View displays the information you want to have on hand.

For more information about tiles, see [Using tiles](#).

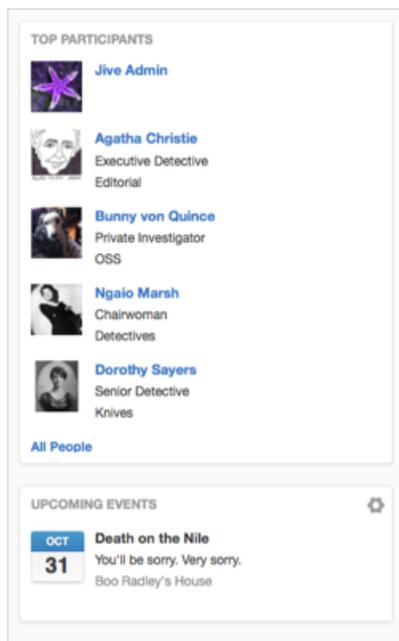
## Using tiles

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 3: 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](#).

## 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.

---

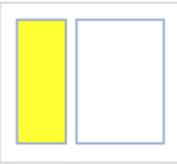
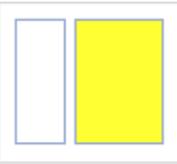


---

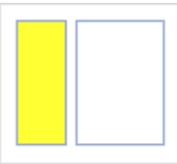
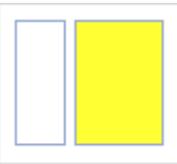
**Note:** The number of wide (that take 2/3 of the page) and custom (listed under the **External Add-ons** and **Custom Tiles** categories) tiles you can add to any Activity, Custom page or Your View is limited. For details, contact your system administrator.

---

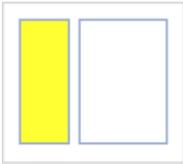
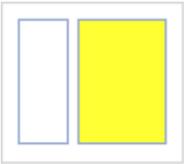
## Collaboration tiles

Tile	Description	Dependencies	 Narrow col- umn	 Wide col- umn
Document Viewer	Shows a full pre-view of a document you choose to display	Content added manually		
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually		
Key Dates	Shows selected dates for your team	Content added manually		

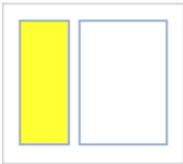
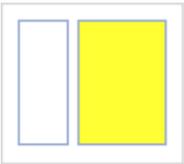
## Graphic Elements tiles

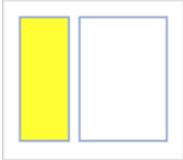
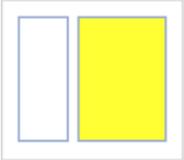
Tile	Description	Dependencies	 Narrow col- umn	 Wide col- umn
Gauge	Shows status on a gauge	Set manually		
Video (External)	Shows a manually selected video from an external, non-community source	Content added manually		

### Custom List tiles

Tile	Description	Dependencies	 Narrow col- umn	 Wide col- umn
Expandable Sections	Shows links to community content under collapsible headings	Content added manually		
Featured People	Builds a list of important people for your place	Content added manually		
Helpful Links	Builds a list of key links for quick reference. Links can be internal to your community or external URLs	Content added manually		
Key Content and Places	Displays a list of content and places that you can edit and manage yourself	Content added manually		

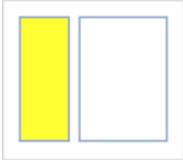
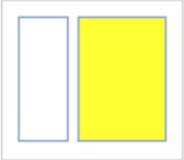
### Dynamic List tiles

Tile	Description	Dependencies	 Narrow col- umn	 Wide col- umn
Frequently Viewed	Shows the people, places, and content you visit most	Relies on an algorithm		
Latest Blog Posts	Shows the newest blog posts in your community	Content added manually. Blogs must be enabled		
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 <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result		
Tagged Content	Displays content that matches specific tags	Relies on content being tagged		
Trending Content*	Shows content that's attracting views and interactions	Relies on an algorithm		

\* Content items can be excluded from the **Trending Content** tile. For more information, see [Removing content items from Top and Trending](#) on page 76.

### 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 <b>Use this view in a tile</b> at the bottom of any People, Places, or Content browsing result		

# Finding people, places, and content

Jive includes several search features to help you quickly find what you're looking for, or just to browse through content, people, and places. You can use the topic in this section to understand which feature best suits your searching goal.

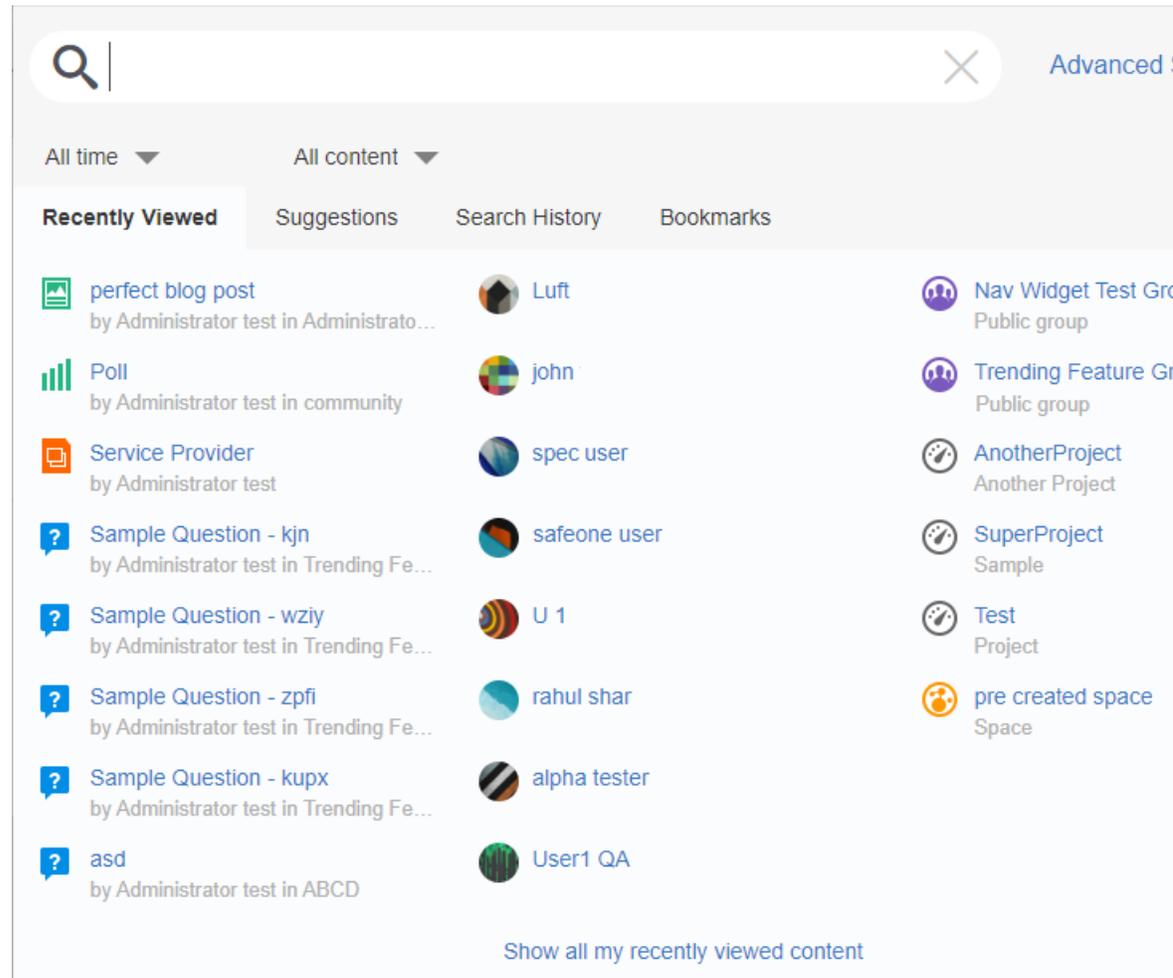
## Search and browse features

Here is an overview of Jive search and browse features. Note that as you interact in the community, Jive keeps track of your interests and connections and recommends relevant content, people, and places.

### Search for something specific by using keywords in the Spotlight search

Clicking  opens the Spotlight search. In order to initiate the search, you click on one of the suggestions or press `Enter`.

**Figure 4: Spotlight search**



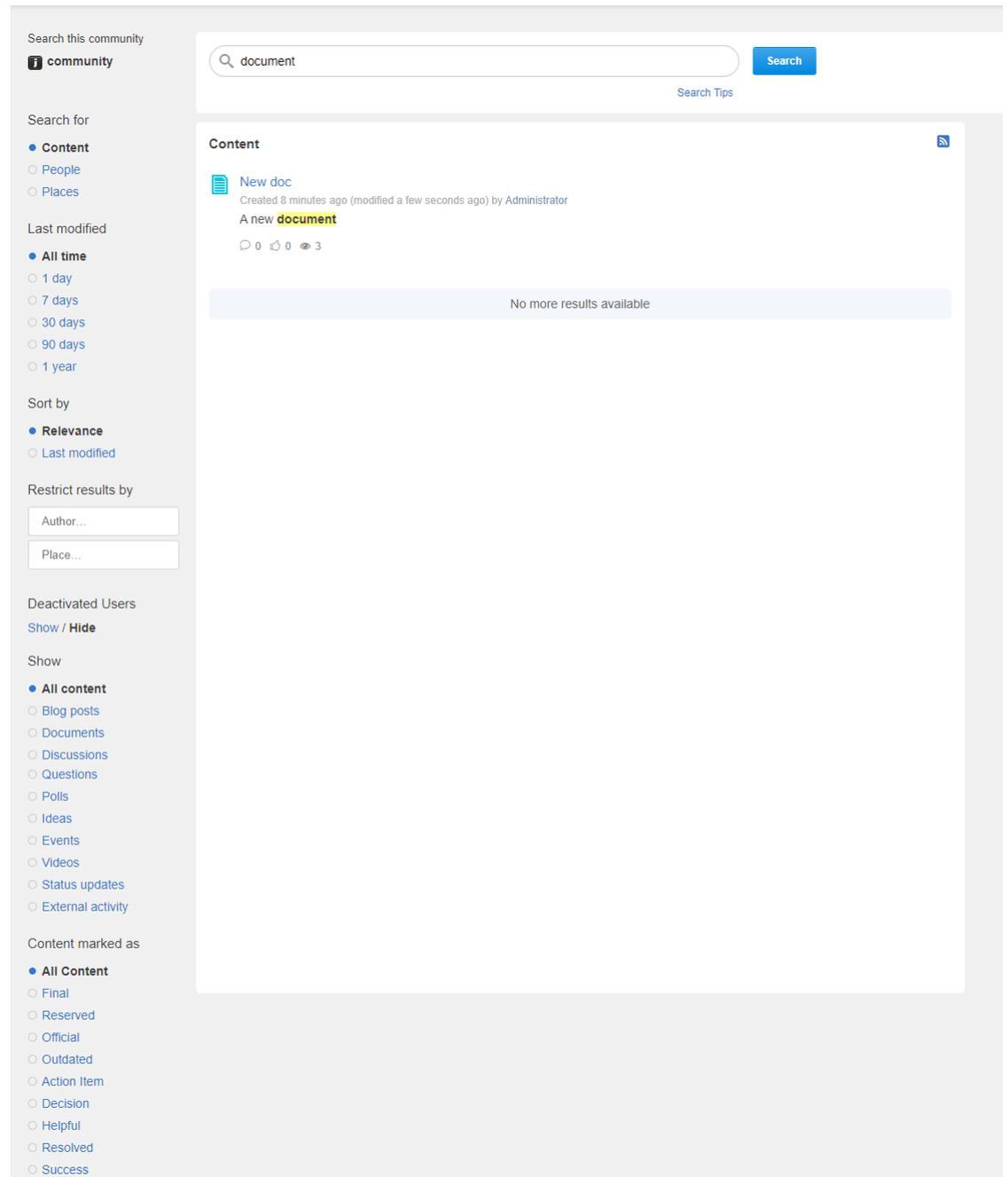
For information on using it, see [Using Spotlight search](#) on page 40.

If that is not enough, you can switch to the Advanced Search. Click **Advanced Search** in the Spotlight search to open the Advanced Search page.

### Search for something specific by using keywords in the Advanced Search

The Advanced Search page offers more options to refine your search than the Spotlight search and does not apply the wildcard, as it expects you to provide your detailed criteria for the most specific results. For example, here you can limit a document search by author or search for deactivated users.

**Figure 5: Advanced Search**



### Check your recently viewed items

To see your recently viewed items, click . This opens the lists of content, people, and places you recently visited on the **Recently Viewed** tab.

### Viewing your search history

- To see your latest searches, click  and then select **Search History**. You can find the last three keywords you searched.
- To see your Jive search history, click **Show all search history** under the searches list.

### Search for something within a place

If you know something is saved in a specific place, you can limit your search to just that place. First, go to the place. Then, type your keyword in the search box and select **click here to only show results for <this place>**.

And in the Advanced Search, you can search both the space and its subspaces (if any). Click **Advanced Search** from the search box, select a space in **Results by > Place** and select the search depth under **Subspace depth** to limit the search by the current space, its direct children, or all spaces under the hierarchy.

### Search for someone's content

If you know someone authored a document or participated in a discussion but can't remember any keywords from the discussion, go to the person profile and click **Content**. From there, browse through their recent content creations and discussions to find what you're looking for.

### Find places by categories

To find places marked with certain place categories, click **your avatar > Places > All**, and then click **Add Filter** and select a predefined place category from the **All** list.

This works only if your community manager set up place categories.

### Browse and filter content, people, and places

Click **People** in the top main navigation menu (it may be nested under the **Content** button), or in the menu under your avatar click **Your Content** or **Your Places**. In the opened page, use the left navigation pane to refine the results by how they relate to you. For more information on filtering, see [Browse and filter content, people, and places](#) on page 47.

### Bookmark useful content and use your bookmarks

You can bookmark any piece of content. You can find your most recent bookmarks later by clicking the Spotlight search at the upper right corner, and then clicking **Bookmarks**. To browse through all of your bookmarks, click **Show all my bookmarks**. From there, you can see the bookmarks of others by clicking the **Bookmarks** link in the left sidebar.

### Tag content to make it easier to find later

You can assign tags that act as keywords to existing or new content to do so for people who might search for it later. You can also assign tags to a status or document. For more information about tagging, see [Using tags](#) on page 51.

### Use recommendations

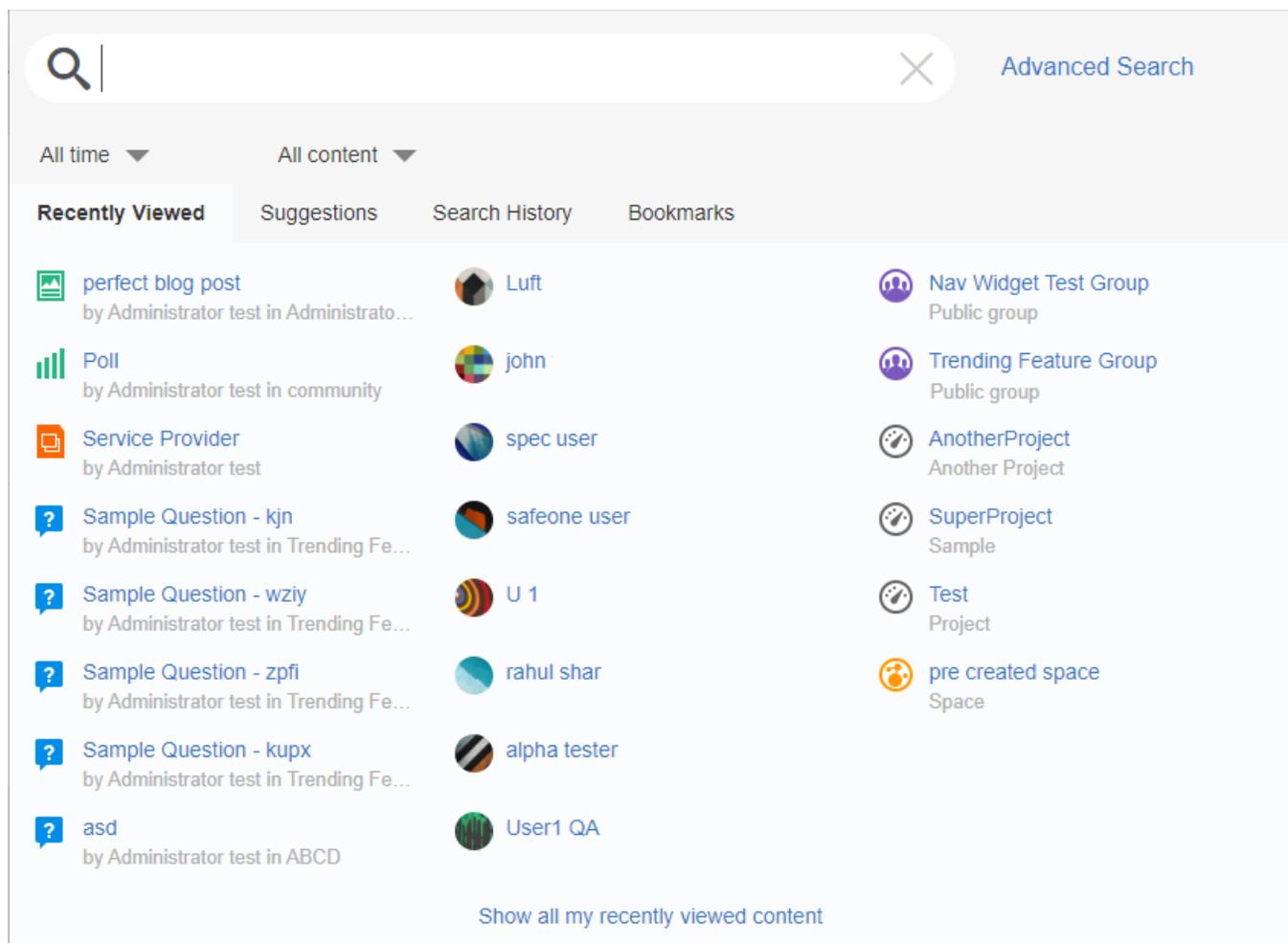
Jive includes a powerful "genius" feature that analyzes your business relationships, expertise, and areas of interest based on your behavior in the community. Jive uses that data to recommend relevant content, people, and places that you might be interested in.

not yet seen in the community. There are several places in the interface to see your recommendations, but a quick way to see them is to navigate to **Recommended** (in the main navigation menu) or to **Your Places** or **Your Content** (from the main navigation menu under your avatar). Then click **Recommended** in the left sidebar. For more information about using recommendations, see [Using your recommendations](#) on page 47.

## Using Spotlight search

The Spotlight search is an easy way to find almost anything that exists in your community. It also displays your activity history and bookmarked items. It can be quickly accessed by using  in the upper-right corner.

**Figure 6: Spotlight Search**



Before you enter a keyword to search, you can see some suggestions based on your recent activity:

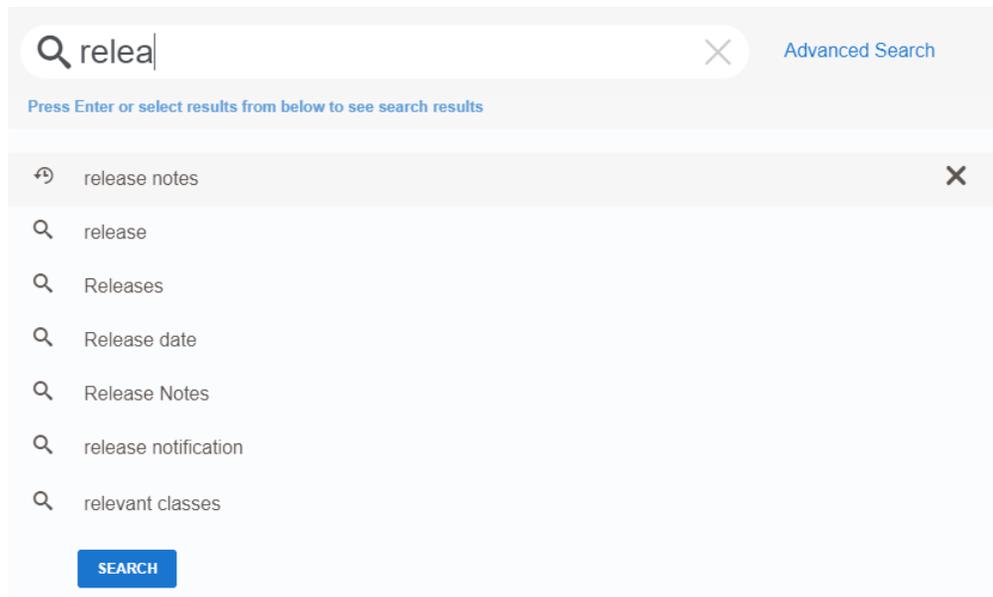
- The latest content items, people, and places you viewed on the **Recently Viewed** tab. Click **Show all my recently viewed content** to see more of your browsing history.
- Content items, people, and places you frequently visit on the **Suggestions** tab.

- Your latest searches in quick access on the **Search History** tab.
- Your latest bookmarks on the **Bookmarks** tab. For more information on using bookmarks, see [Using bookmarks](#) on page 52.

**Tip:** You can disable your History and Bookmarks from being displayed in the search by using the **Don't show history or bookmarks in search option** on the **Preferences** page.

And you get more suggestions when you start typing:

**Figure 7: Possible search suggestions when you type relea**



Here you can find details on using the Spotlight Search for the common search tasks.

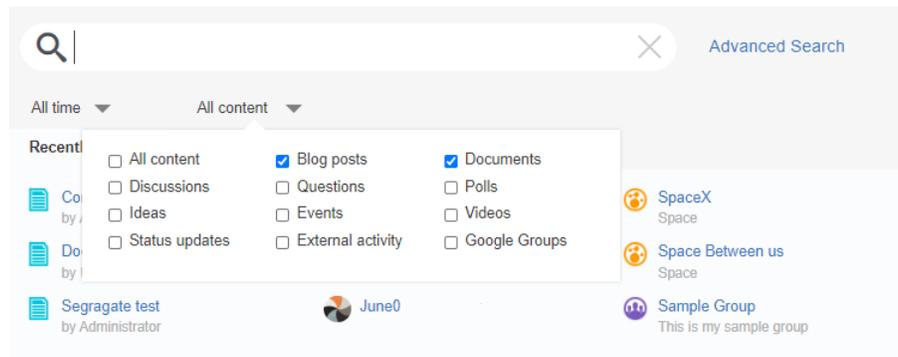
## Searching content items

To start searching, type the word, part of the word, or a phrase you want to search for and press `Enter` to initiate the search. Suggestions are displayed while you are typing the keyword and may be a good starting point for your search; to use one of them, select it and 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.

When searching for content items, you can narrow down the results with filters:

**Figure 8: Spotlight search and filters**



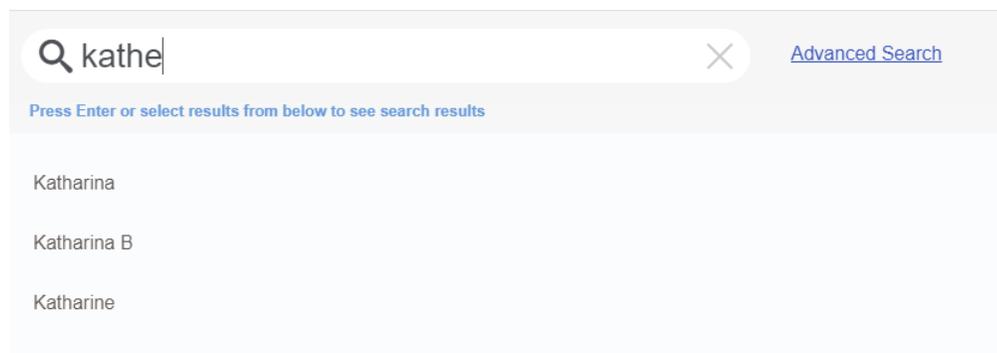
- With the time filter you get only items updated within the selected period of time: click **All time** and select the required period. If **All time** is selected, then search is not restricted by period (which is the default setting).
- With content filter, you can limit search to only certain content types: click **All content** and select the required type (or types) from the available list. If **All content** is selected, then search is not restricted by content type (which is the default setting).

If the Spotlight search does not return the results you need, you can click **Advanced Search** to see all matching results on the Advanced Search page. This page provides more filtering options to perform a more complex and refined search. For more information, see [Search rules](#) on page 44.

## Searching people

Start typing the name in the search box and check the suggestions as you type, then press `Enter` to initiate the search. You can search not only by name but also by other details, such as a user's e-mail or department.

**Figure 9: Search suggestions when searching for people**



A direct match is displayed as a card just under the search box. Any other results are displayed under **People** (if the match is fuzzy), **Content** (the items that are associated with the users), and **Places** (the places that are associated with the users).

If you don't see the user you are searching for, you can click **Advanced Search**. There you can search for a direct name match if necessary. And you can search for deactivated users only on the Advanced Search page.

## Searching for places

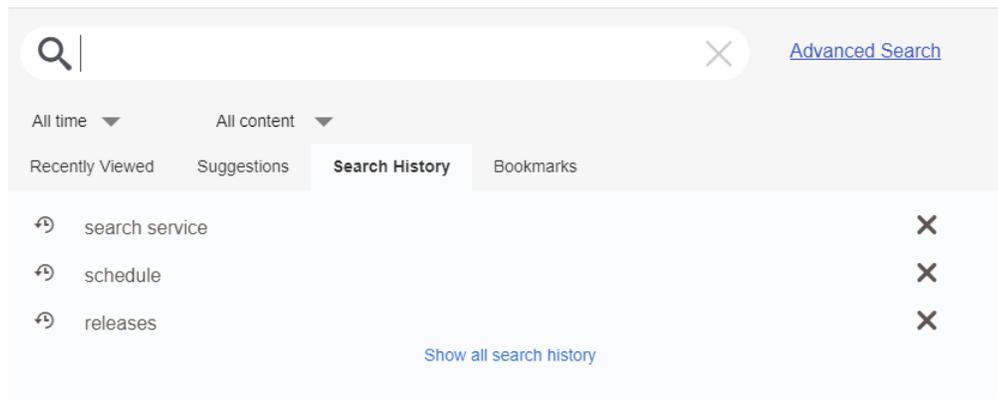
Start typing the place name in the search box, then press `Enter` to initiate the search. You can search also by place description or a content item you know to be in that place.

A direct match is displayed as a card just under the search box. Any other results are displayed under **Places** (if the match is fuzzy), **Content** (the items that are associated with the places), and **People** (who are associated with the places).

## Using search history

The **Search History** tab holds your last three search keywords for quick access.

**Figure 10: The Search History tab in the Spotlight Search**



And clicking on **Show all search history** opens your search history.

**Figure 11: A Search History page example**

Useful Links		Search History	
<a href="#">Bookmarks</a> <a href="#">Advanced Search</a>			
		Searched Keyword	Searched on
		↻ search service	May 07, 2020, 11:43 PM
		↻ schedule	May 07, 2020, 11:41 PM
		↻ test AND instances	May 07, 2020, 01:44 PM
		↻ account	May 07, 2020, 01:44 PM

You can remove any keyword from the list by clicking **X**.

## Search rules

You can use this search reference to get the most out of the search feature in Jive. These rules apply to all word search features in the application.

### Search for specific words

This is the most basic search mode and is also the default. Type your search terms and press `Enter` to see the most relevant content, people, or places for those specified words in any order.

### Search for someone's name

Searching for people is similar to searching for specific words. Note that you can't use phrase searching, wild cards, or field- and date-specific searching to find the names of people in the community.

### Search for phrases

If you enclose a phrase in quotes, your search returns only content where the words in quotes occur next to each other and in the same order. For instance, specifying `black cat` returns text where this phrase appears exactly as quoted, such as `our black cat brings us luck`, but does not return `the cat was hiding in the black box`.

---

**Note:** Content searches are case-insensitive. For example, entering any of `Jive`, `jive`, or `JIVE` returns content with any of the words `jive`, `JIVE`, or `jIve`. For both regular and phrase searches, we also match words that are very similar, but not identical.

---

### Search for content with words containing certain letter sequences

The wildcard character `*` matches any number of non-whitespace characters when it is placed at the end of a word or within a word in the query.

You can use the following examples to search for `multiplication` or `concatenation`. Note that Spotlight searches automatically use wildcards, even if you do not type `*` in the string.

<code>mult*</code>	Matches content containing the words <code>multiplication</code> , <code>multiple</code> , <code>multimodal</code> , <code>multitude</code>
<code>con*ion</code>	Matches content containing the words <code>contagion</code> and <code>concatenation</code>

---

**Note:** A wildcard cannot be used at the beginning of a word, and it can't be used as a standalone word.

---

## Limitations in searches for certain letter sequences

The search engine splits words into subwords and performs optional transformations on subword groups. Words are split into subwords with the following rules:

- Split on intra-word delimiters (by default, all non-alpha-numeric characters), for example, `Wi-Fi` `Wi, Fi`
- Split on case transitions: `PowerShot` `Power, Shot`
- Split on letter-number transitions: `SD500` `SD, 500`
- Leading and trailing intra-word delimiters on each subword are ignored: `//hello--there, dude` `hello, there, dude`
- Trailing 's are removed for each subword: `O'Neil's` `O, Neil`

Based on these rules, sometimes you may not get the results you are looking for. For example:

- If the name of an idea is `Ideatest`, this idea is not returned when you search for `test`.
- If the name of a document is `Summer0718photos`, this document is returned when you search for `0718` or `photos`. But it is not returned if you search for `07`, or `18`, or `phot`.

## Synonym searching

Your community may or may not support synonym searches, depending on whether your community administrator has enabled this feature. Ask your community administrator whether synonym searches are supported in your community.

If synonym searches are enabled, your searches return results for synonyms. For example, if you searched for `search tips`, the search engine would return any found results for `search tips` AND `find tips` because `search` and `find` are synonyms.

## Filtering results by date

You can filter the results to see only content items that have been updated within, for example, the last 30 days: Select the period from the list, and enjoy the filtered result.

The default setting is **All time**, which does not put any date range restriction on your search. The other available ranges are 1 day, 7 days, 30 days, 90 days, and 1 year.

## Compound expressions by using Boolean operators

The special keywords `AND`, `OR`, and `NOT` let you create logical expressions in your searches. When you search, you need to use these terms in capital letters to distinguish them from normal words. For instance, the word `And` in a search is interpreted as the word `and`, not the special operator `AND`.

The `AND` operator says that the search should return content containing both the search terms before and after the `AND` operator. The `OR` operator returns content if either one of the terms matches. The `NOT` operator excludes documents that contain (in the fields searched for) the search term after the `NOT`. You can't start a search with the `NOT` operator.

You can also use these operators with sub-queries enclosed in parentheses to create more complex expressions as shown in the following examples. If you don't add an operator to your search, search adds the `AND` operator between words for any type of search.

Consider the following examples of searching for a text fragment:

<code>"quick brown fox" OR rabbit</code>	Matches text containing the exact phrase <code>quick brown fox</code> or the word <code>rabbit</code> .
<code>quick brown fox</code>	Matches content containing the words <code>quick</code> , <code>brown</code> , and <code>fox</code> in any order. Search implicitly assumes the <code>AND</code> operator when an operator is not specified.
<code>(quick brown) AND (fox OR rabbit) AND NOT forest</code>	Matches content containing both <code>quick</code> and <code>brown</code> in any order, plus either <code>fox</code> or <code>rabbit</code> , but not containing the word <code>forest</code> . This example shows how you can use parentheses to group more than one word together as a regular (non-phrase) search and to specify the order of operations.

---

**Note:** The `NOT` operator can only be applied to simple terms, not compound sub-queries, and it cannot be used inside a sub-query.

---

## Special characters and operator words

The following characters and operator words are treated specially in the search syntax (separated by a single space):

**\* ( ) " AND OR NOT** You can't search for these characters and operators, because the application uses them for special search syntax. If you use these words in search text in a way that doesn't make sense to the application, the search engine ignores them. For example, an odd number of quote characters is ignored, and multiple asterisks next to each other are interpreted as a single wildcard (\*).

## Promoted search results

You may see some results marked as **Promoted** when you search. These results have been selected by an administrator to ensure that certain content is always associated with one or more search keywords, even if the keyword isn't actually in the content. For example, your site administrator may want users who type `Benefits` to always see the `Human Resources` page as the first result, even if there are many other pages with titles containing the word `Benefits`. If a result has been promoted, you may see it again farther down the results page.

## Using your recommendations

You can use the Jive recommendation features to find content, people, and places you might like to follow in your streams.

Jive includes a powerful "genius" feature that analyzes your business relationships, expertise, and areas of interest based on your behavior in the community. It then uses that data to recommend relevant content, people, and places that you have not yet seen in the community. The more you and others interact in the community, the better the recommendations you receive.

Depending on how your community manager has set things up, you may see some of these helpful tiles when cruising through your News streams:

- Recommended Content
- Recommended People
- Trending Content
- Trending People

You can also click on any of the browse menus (People, Your Places, and Your Content), and then click the **Recommended** tab on the left.

### Recommendations limitations

Jive recommendations obey all content permissions and do not recommend content that you don't have permission to view. Therefore, you may not see the same Trending Content or Trending People as others, depending on your content viewing permissions, when you logged in, and when the last data collection occurred.

Your Recommended Content, Recommended People, Trending Content, and Trending People all change based on your shifting interests, affinities, and even changes in the org chart.

### Excluded content

Content items can be excluded from the **Recommended** tab. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Browse and filter content, people, and places

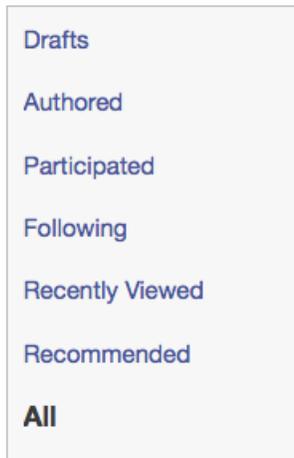
You can find the information you need by filtering as you browse content, people, or places.

The People link is in the main navigation menu only, but content or places you can start browsing by selecting **Your Content** or **Your Places** in the menu under your avatar.

## Using the filter keyword search

- Start by typing a keyword in the text box and waiting for the results to refresh.

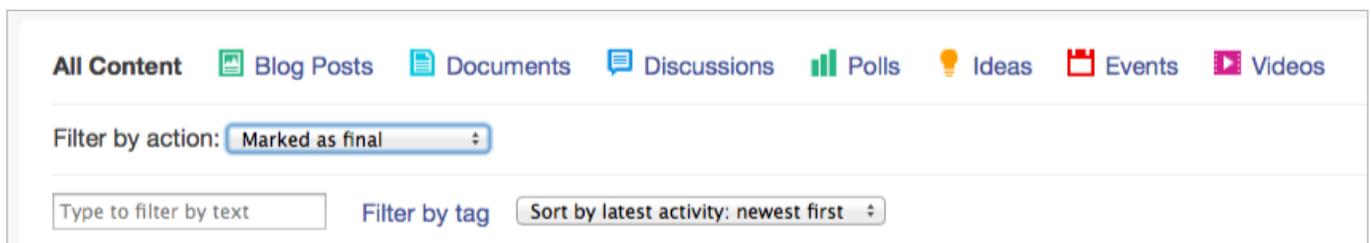
Note that every browse page includes a set of filtering tabs on the left and across the top which lets you refine your search criteria. For example, when you browse content, you can choose whether to browse everything or only content you authored or participated in as you can see in the following image.



The icons at the top of each browsed page let you filter by content type.

## Refining your filter results by type

You can limit your view by selecting certain types of information. For example, you can limit the searched content to discussions by clicking **Discussions** next to **All Content**. You can even filter by actions or outcomes marked on content. For instance, you can filter to see only content marked Official.



Similarly, place browsing can be narrowed to spaces, social groups, or projects.

You can use the keyword, tag, and filter options to refine your search even further. Note that tag filtering only works if the content is tagged.

---

For example, here are two ways you might look for last April's East Coast sales report:

- Select **Your Content** from the menu under your avatar, change the filter to **All**, and type **Sales Report** in the **Type to filter by text** box. Then click the arrow under "Sort by latest activity" and select **Sort by date created (newest or oldest)**. By default, the most recent results are shown first.
- Click **People** from the top navigation bar and type the Sales Director's name in the **Type to filter by text** box. If you don't know her name, try typing in "Sales Director." After you have located the person, click their name, and go to the **Content** tab. From there, select **Authored** from the left-hand menu and **Documents** from the top menu to show only the documents she wrote. You can filter these further by keyword or tag if she's an especially productive content creator.

## Making things easier to find

You can rely on these best practices to make things easier to find for yourself and others.

To help yourself and other people find the content that you create, try the following:

- Put the content in a place where it's likely to be discovered. For example, put it in a group that's open-access and of interest to your audience to attract the notice of community members who follow that group. Before you publish new content in a place, you can see how many people are following the place, and (if it's a group) how many are members.
- Bookmark content so that you and others can find it by browsing bookmarked items. For more information, see [Using bookmarks](#) on page 52.
- Apply tags to the content or add them in the body of the content by using the #, which is a hash or pound sign, and following it with the tag phrase, such as `#tagging_this`. Tags give other people a way to find things based on the ways your community thinks about them. You can follow tags in your streams. For more information about tags, see [Using tags](#) on page 51 and [Following tags](#) on page 52.
- As you collaborate on content, make sure you mark it appropriately. For example, if someone answers your question, mark the answer as Correct. If a document reaches a final state, mark it Final or Official. Other people can see these outcomes and use them to filter results when searching and browsing.
- You can make yourself easier to find by adding information to your profile that other people might be interested in. You can add your experiences to your expertise list. For more information about profiles, see [Setting up your profile](#).

## Labeling people to manage them around community

You can name and color code groups of people to make them easier to find when you browse or communicate with people as a group.

You can create labels to group your friends or connections, the people you follow. You might use this to group people from a certain location together. For example, if you have a New York office in your company, you can create a New York label. This helps you find people fast when you have a lot of connections. When you apply a label to multiple friends or connections, the label becomes a way to show only those with certain labels. Additionally, you can type the label name in when you're creating a direct message or adding collaborators on a document to automatically include all the people with that label.

To create a label:

1. Browse your friends or connections by clicking **People** and selecting **Following** on the left.

---

**Note:** You can only group and label people you're following.

---

2. Click **Create Label** in the left pane.
3. Select a color, type the name for the label.
4. Click **Save**.
5. Add someone to that new label group by clicking the gear icon on their profile card, and then clicking **Label People**.
6. Select the label that you want to apply to the person.  
You can remove the label by clicking it again to deselect it.
7. If you want to delete a label group later, click **Browse > Following**, and then click the **Delete** label icon that shows up when you hover the mouse over the label.

## Role badges

If your community administrator has activated role badges, then you can see small icons next to certain community user names.

A role badge is an icon used to indicate the roles or responsibilities of community users. You might use this to find someone who can answer a question or identify people whose answers you can count on. Hover your mouse over the icon to see the name of the role.

Here's a list of possible roles for the badges:

- Administrator
- Champion
- Employee

- Expert
- Moderator
- Support

## Using tags

Tags are keywords that you and others assign to content. Assigning tags to your content makes it easier for you and others to find later.

You can assign tags to new or existing content.

### Tagging a status update

- To tag a status update, type # followed by your tag.

For example, a status update of "Really enjoying that amazing #presentation about #XYZ customer" shows up in search results for "presentation" and "XYZ."

### Tagging content

#### Adding tags when creating or editing content

You can add tags when you create content: Enter tags into **Tags** before you **Post** or **Update**.

#### Adding tags to published content

To add tags to existing content, click **Edit Tags** at the bottom of the content editor and add your tags. Then click anywhere outside of the field to save.

#### Adding tags in the content editor

You can also add tags on-the-fly as you're editing content. To do this, type # (or click **# Tag**) followed by your tag phrase into the content editor.

For example, if you're writing about your competitor's new corporate branding, you could say, "Company X is resorting to Comic Sans. **#jumpingtheshark**."

### Tips for tagging

- Consider using any existing tags that appear in the suggestion box. Existing tags are often assigned to related content, so it's good practice to use them.
- Use an underscore between words, such as **sales\_report** or **employee\_benefits**.

---

**Note:** If you are tagging content that is being moderated by an admin, your tags may not show up right away because content updates may need to be approved.

---

## Following tags

You can follow tags to discover new areas where you can become involved and stay informed.

Tags can generate more participation and collaboration by helping people find your content. Create custom streams that include people, places, and tags so you can fine-tune the stream's content. Following tags in custom streams helps bring you relevant information from uncommon sources.

For example, if you're in the accounting department, you can add the VP of Finance and the Accounting Group to your Accounting stream. But also think about adding tags like #money, #pay, #taxes to direct content into your stream that you don't normally come across. For more information, see [Creating custom streams](#) on page 19 and [Examples of custom streams](#) on page 20.

To follow a tag:

1. Create a custom stream.
2. Search for relevant terms.
3. Click **Tags** to see all tags that relate to that search term.
4. Click **Add** to include tags in your stream.

---

**Note:** When you follow a tag, only content that's been tagged with that tag sometime in the previous 180 days shows up in your custom stream.

---

## Using bookmarks

Bookmarks help you keep track of your favorite content over long periods of time. You can bookmark content inside or outside of your community.

You can bookmark any content in the community, and sites outside of the community. When you want to look at that content again later, you can go to it quickly by clicking in the search box at the top of any page and selecting **Bookmarks**.

You can see a list of your recent bookmarks. Clicking **Show all bookmarks** at the bottom of the list lets you toggle between a complete list of your bookmarks – **Your** – and public bookmarks from everyone in the community – **All**.

---

**Note:** You won't see bookmarks created for content that you can't access, such as documents in a private group.

---

### Bookmarking content inside your community

To bookmark content stored inside your community:

- Go to the content item, and then click **Bookmark** in the right menu.

Created bookmarks have corresponding titles to easily be located for later use.

---

## Bookmarking sites outside of your community (external bookmarks)

---

**Note:** To enable external bookmarks, you need to file a support ticket with [Support](#). For more information, see [Getting started with the new Jive Support Portal](#) on Worx.

---

To bookmark sites outside of your community, you need to add the bookmarklet tool to your web browser. The bookmarklet tool allows you to bookmark external sites and bring them inside your community.

To install the bookmarklet tool:

1. Click Spotlight search, and then select **Bookmarks > Show all bookmarks** .
2. Under **Install Bookmarklet** in the left pane, click **Click to install**.
3. Drag the **Add Site** button onto your browser's toolbar.

To bookmark a site outside the community:

- Click **Add site to community** in your browser's toolbar and then add your notes and tags.

You can use the bookmarklet link to bookmark any content as you browse the Web. In other words, you don't need to be using Jive to save and share bookmarks in your Jive community.

You might also be interested in learning about Jive Anywhere, which allows you to socialize things in your Jive community that you've found on the Web or even in other applications. Your community may not include this additional module by default. For more information, see the Jive Anywhere Help.

## Can't remember people, place, or title?

Sometimes you can't remember the title, people, or place of something you know you saw. In that case, try this search method.

For example, you remember participating in a discussion during the last three months about how to increase customer survey participation, but you can't remember exactly the discussion title. Or maybe that was not a discussion, but a blog post?

Click  at the upper right and type in keywords, such as *customer survey*. Click **All content** and select **Discussions** and **Blog posts** under the search box because you don't need to see results from documents or polls or ideas. Then click **All time** and select **90 days** to get only items updated within the last three months.

If you get too many results, you can try clicking **Advanced Search** (this opens the Advanced Search page) and narrowing the results even more: by a possible author or a likely place.

## Using social groups

Social groups help you bring people together around shared interests, ideas, and projects. Here you can find how to create and manage social groups in Jive.

*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.

## Creating groups

Creating a group enables you to set up an area where like-minded people can put their heads together and share information on the group subject. You must have special permissions to create a group, which are set by your community administrator.

Before you create a group, you may want to consider the purpose of the group, what kind of information needs to be included, who will participate, and how people who need to know about it will find it. The way you name the group and the tags you assign to it are different ways you can make it available to people who might be interested in the group. For more information, see [Group creation options](#) on page 56.

---

**Important:** You can change the group URL when you are creating a group. You won't be able to change the URL after you create the group.

---

By default, groups use Activity pages with tiles as landing pages.

To create a group:

1. Click  > **Group** in the main navigation menu.

This opens the **Create Group** dialog box.

2. In **Name**, enter the name of the group.

The group name must be unique within the community. This name shows up at the top of the group page and at the end of the URL that links to the group. Also, it should be identifying the group within the community.

3. If required, in **URL**, change the group URL.

You can use this option to make a short URL for your group. The group URL must be unique within the community.

4. In **Description**, enter a brief description to appear in the group's main page.

---

You should add information on what the group is about in a way that attracts other people who might be interested in the group. For example, your RFP Collaboration group could say "Look for the latest RFP templates and materials here."

---

**Note:** This information is displayed behind the information icon  and on the Overview page if the group uses one.

---

5. Under **Group Type**, choose a group type.

You can granularly restrict access for viewing and editing content. For more information, see [Types of groups](#) on page 60.

6. In **Tags**, enter tags that can be used to find this group. To enter multiple tags, press `Enter` after each word or phrase.

Tags are words or short phrases that help other people find your group. For example, a Sales group might use the following tags: *RFPs*, *sales\_videos*, and *wins*.

7. In **Categories**, select the place categories to associate with the place.

The place categories are used to identify places while browsing. They are used to classify places and differ from content categories. This option is available if place categories are configured in your community.

8. If required, click **Advanced options** to expose more options and specify the following:

- **Overview page:** Specify whether you want to use a widget-based Overview page. This option may be not available in your community. For more information, see [Adding Overview 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](#).

---

- **Locale:** Select your default language for the group. The group also uses the time zone and date format commonly used in this region.

By default, your place uses an Activity page as its main page, with the option to add more custom pages. We recommend using an Activity page because it can be displayed on mobile devices and because it's more friendly to streaming content. If widgets are enabled in your community (not common), you may want to include an Overview page with widgets.

9. Click **Create Group**.

10. If required, in the **Invite People to Join** dialog box, add users who you want to invite to the group, and then click **Send Invitation**.

You only see this option for Private and secret (Private: Unlisted) groups.

The group is created, and the main page opens for your view. Now you can customize the group, as described in [Customizing your group](#) on page 57.

## Group creation options

Creating a group always starts with clicking Group in the Create menu, but it helps to understand the options that can help your group do what you want it to.

### Group landing page

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

### Advanced group creation options

In the following table, the asterisks (\*) note when this advanced option for place navigation might be unavailable. For more information on differences between Activity and Overview pages, see [Understanding pages in places](#).

**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](#).

I want to . . .	I should. . .	Can I change this later?
Collaborate in private by limiting who can see what's in my group, or even who can see that my group exists.	Choose a Private or Private: Unlisted (also known as Secret) group type during the initial setup. You can change this setting later. For more information, see <a href="#">Types of groups</a> on page 60.	Yes. Note that changing this setting changes the visibility setting for all the group's content.
Design a landing page that's optimized for a specific work purpose.	Create a group, then for the Activity page choose and configure a Place Template customized for the kind of work you want to do. For more information, see <a href="#">Place Templates for designing activity and custom pages for places</a> . Place Templates only apply to Activity pages.	Yes.
Design a landing page with widgets*	Select the <b>Overview page</b> check box under the <b>Advanced Options</b> during setup, and fill out a widget layout under <b>gear icon &gt; Overview Page</b> from the group page. For more information, see <a href="#">Designing Overview pages for places</a> .	Yes.

I want to . . .	I should. . .	Can I change this later?
Make more custom pages in the place for displaying information, not just a landing page.	Create the group, and then add the pages to your place afterward. See <a href="#">Adding custom pages to places</a> .	Yes.
Integrate external streams from Facebook, Chatter, or any other apps your community admin has enabled.*	Create the group, then click <b>Add a stream integration</b> when configuring the Activity page. For more information, see <a href="#">Adding tiles with external stream integrations to Activity page</a> .	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.
Store the place binary documents outside Jive, for example, in Box or SharePoint.	During place setup, after you preview the topic, edit the Activity page. External file storage is available if at least one storage provider has been set up by community administrators. For more information, see <a href="#">Using external file storage</a> .	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 this group a place for collaborating with people who aren't members of the community.	Make the group Private or Private: Unlisted, and select <b>Externally Accessible</b> . For more information, see <a href="#">External groups overview</a> on page 192	Yes. Changing the Externally Accessible setting will remove access by non-members, but their contributions will stay in the group.
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.

## Customizing your group

After you create a group, you can change it to suit your requirements.

- You can apply a place template to quickly populate the tiles on the Activity page of your group. The default template is Team Collaboration. For more information, see [Applying place templates](#) and [General place template reference](#).
- You can change the place image or the banner to configure the visual presentation of your place. For the detailed procedure, see [Customizing the group landing page](#) on page 58.
- To enable features, click **Gear icon > Configure activity page**. Click the Edit icon for the **Enabled Features and Content Type** tile. When it opens, you can select the types of content that your group will use. This list also controls what shows in the Content tab of the group, as well as what content types you can use to filter the Content tab.

- To set up external storage, click **Gear icon > Configure activity page** , and then click **External Stream Integration**. When it opens, you can select where the files in this group will be stored.

If your administrator has enabled a connection with an external storage provider such as Box, Dropbox, SharePoint, or Google Drive, you can set your group to synchronize document storage to that provider. Files that are uploaded to the group will be stored in external storage, rather than in Jive, and files can be added, deleted, or modified from either side.

---

**Note:** For Box users: Although you can connect an open group to a Box folder, only community members who have joined the group can see Box documents and have their comments reflected on the Box side. Because of this limitation, it's recommended to use the Box external storage only with Members Only (Public: Restricted), Private, or Secret (Private: Unlisted) Groups.

---

## Customizing the group landing page

If you're a group owner or administrator, you can customize your group's landing page so that it displays the information and images that you want visitors to see.

### Adding a banner and logo

To add a group logo and change the group banner to help brand your group's landing page:

1. Go to the landing page for your place and click the **Gear icon > Settings** .

---

**Note:** The **Edit** page will appear. You can make changes to this information now if you want, but it's not required right now.

---

2. Click **OK**
3. Click **Edit Banner** to customize the header.
4. Click the camera icon to select a new image to the header.
5. Click **Save**.

### Adding tiles or widgets to customize the page layout

- If you chose an Activity page, add tiles and external stream integrations, as described in [Adding tiles with external stream integrations to Activity page](#).

---

**Tip:** To make it even easier, assign a place template to get an Activity page with pre-configured tiles and layout, as described in [Applying place templates](#).

---

- If you chose an Overview page, change the layout of your widgets, as described in [Setting up Overview 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](#).

---

### Further customizing your landing page and making it express your group's purpose

- If you chose a tile-based Activity page, see [Place Templates for designing activity and custom pages for places](#) for more details about how to use it effectively.
- If you chose a widget-based Overview page, see [Designing Overview pages for places](#) for more 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](#).

---

## 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](#).

---

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](#).

---

**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](#).

### 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](#).

---

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.

## Types of groups

A group's type determines who can join, see content, participate, and invite new members.

Unlike spaces, which use permissions to determine access, social groups rely primarily on membership to determine access. Because groups do not exist inside spaces, they do not inherit any space permissions. Note that group owners and community managers can change the settings for a group after it is created.

Use the following tables to help you understand the different types of groups that can be created in the community. Most communities use the group scheme in the first table: if your community has enabled Group Membership Evolution, you'll see Public and Private as the main group types and should use the second table.

### If you have Members Only and Secret Groups

	<b>Secret</b>	<b>Private</b>	<b>Members Only</b>	<b>Open</b>
What is visible to non-members?	None	Group name only	All	All (no membership)
Who can see content?	Member	Member	Anyone	Anyone
Who can participate?	Member	Member	Anyone can interact with content and create discussions and questions. Only members can create other content types	Anyone
Who can invite new members?	Member or administrator	Member or administrator	Member or administrator	Anyone
Who can approve new members?	Administrator	Administrator	No membership	No membership

## If you have Public and Private Unlisted groups

	Private Unlisted	Private	PublicRestricted	Public
What is visible to non-members?	None	Group name only	All	All (no membership)
Who can see content?	Member	Member	Anyone	Anyone
Who can participate?	Member	Member	Anyone can interact with content and create discussions and questions. Only members can create other content types	Anyone
Who can invite new members?	Member or administrator	Member or administrator	Member or administrator	Anyone
Who can approve new members?	Administrator	Administrator	No membership	No membership

## Inviting people to join groups

As a group administrator or member, you can invite people to join the group. Note that if you're using Jive as an internal corporate community, people from outside the community might not be able to join your group.

You can find out about group members as follows:

**Count of members (and followers)**

Click  on the group's landing page.

**Who are members (or followers)**

Click on the **Followers** and **Members** links to be directed to the group's **People** page.

Any group member can invite any other user to join a group. If the group is public, then you can share the group with non-members. If the group is private or secret (also known as Private: Unlisted), the invited user must accept the invitation. A group administrator must then approve the request to join the group. If it was a group administrator who originally sent the invitation to the private or secret group, the approval is automatic. For more information on how a group's type affects the content visibility, participation, and invitation permissions for group members, see [Types of Groups](#).

To invite people to join your group:

1. Go to your group and select **Actions > Invite members** .
2. In the **Invite People** dialog box, enter the Jive user names or email addresses of people you want to invite. If you can't remember them, you can do two types of searches:

- To invite several people from your email address book, browse your contacts by clicking the browse icon. Select the people you want to invite, and then click **Add selected people**.

---

**Note:** You can also paste in a comma-, space-, or semicolon-separated list of addresses exported from your email application.

---

- To invite only those with certain skills, click **Search by skill** to browse people by their skills. Type in the skill you are looking for, or select a popular one. Select the people you want to invite, and then click **Add selected people**.
3. Under **Include a personal note**, edit the message you want potential group members to see with their invitation.
  4. Click **Send Invitation** .

The invitations are sent to the persons you specified.

## Managing pending invitations

As a group administrator, you can delete or resend invitations while managing group membership. This can be useful if you've got a lot of outstanding unanswered invitations.

To resend or delete invitations to the group:

1. Go to your group and select **Gear icon > Members** .
2. On the **Manage group members** page, click **Open Invitations** to view the pending invitations.
3. To delete pending invitations, select the invitations, and then click **Delete Invitation** in the tab menu.
4. To send invitations one more time, select the invitations, and then click **Resend Invitation** in the tab menu.

## Posting status update in groups

There may be times you want to limit your status update to only a specific group in your community. When you post a status update to a group, only members and people following the group see the update in their attention streams.

The status updates are displayed in the Trending Content tiles. If your group has an Activity page that includes the Recent Activity tile, the status update is displayed there as well. Note that you can exclude the status update from the Trending Content tiles and the Top & Trending lists in the News streams; for more information, see [Removing content items from Top and Trending](#) on page 76.

To post a status update for a group:

1. You can create a group update from either the News page or the group's Activity page.

---

**Note:** Some groups do not use Activity pages.

---

- **Activity Page:** Go to the Activity page for the group where you want the status update to display.
- **News:** Under **All Activity**, click **Change** next to your community name, and then select or type the name of the group from the group picker.

2. Type your status update in the **What's going on?** box next to your avatar.

3. Click **Post**.

## Enabling non-member content sharing

Private group owners can configure their private group so that group members can share specific documents and discussions with non-group members. This allows non-group members to help review or edit private group content but does not allow them to see any other content items that live in the group.

To enable this feature, your community manager first needs to enable non-member content editing for private groups in your community. For more information, see [Managing external groups](#) in the Community Administrator Guide.

You must be the group owner or administrator to enable non-member content editing.

To enable non-member content editing in a private group:

1. Go to the private group, and then click **gear icon > Settings** .
2. Click the pencil icon next to the group's name in the header.
3. Under **Group Type**, make sure that group type is set to **Private**.
4. Select the **Content Editing by Non-Members** check box.

If you don't see this option, you need to ask your community manager to enable non-member content editing in private groups.

5. Click **OK**, and then **Save** your changes.

Documents, discussions, questions, and uploaded files in a private group can be shared with the users who are not members of the group. For more information, see [Sharing content with non-group members](#) on page 63.

## Sharing content with non-group members

Documents, discussions, questions, and uploaded files in a private group can be shared with the users who are not members of the group. This is useful if you need a non-group member to help you review and edit a document or discussion.

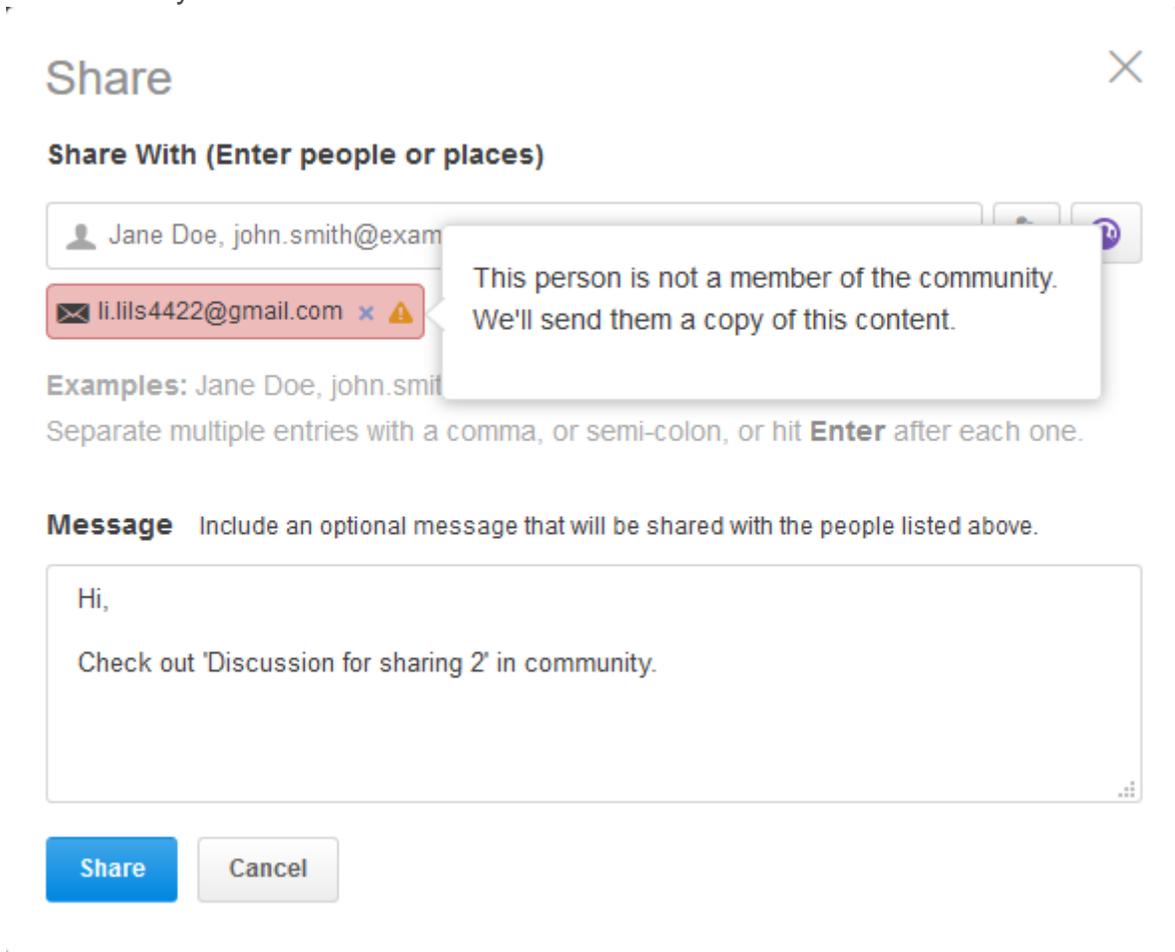
## Content sharing options

Non-member content sharing must be allowed for the group. The group owner or community administrator may need to enable this feature for you, depending on how your community is set up. For more information, see [Enabling non-member content sharing](#) on page 63.

With the feature enabled, you can share documents, discussions, questions, and uploaded files (when they are stored within the group). Besides, you can choose both community members and people outside of the community as recipients.

A content item can be shared as follows:

- PDF export: The selected content item is converted to PDF with comments included and sent by email.



## Share



### Share With (Enter people or places)

Jane Doe, john.smith@exam

li.lils4422@gmail.com x ⚠

This person is not a member of the community.  
We'll send them a copy of this content.

**Examples:** Jane Doe, john.smit

Separate multiple entries with a comma, or semi-colon, or hit **Enter** after each one.

**Message** Include an optional message that will be shared with the people listed above.

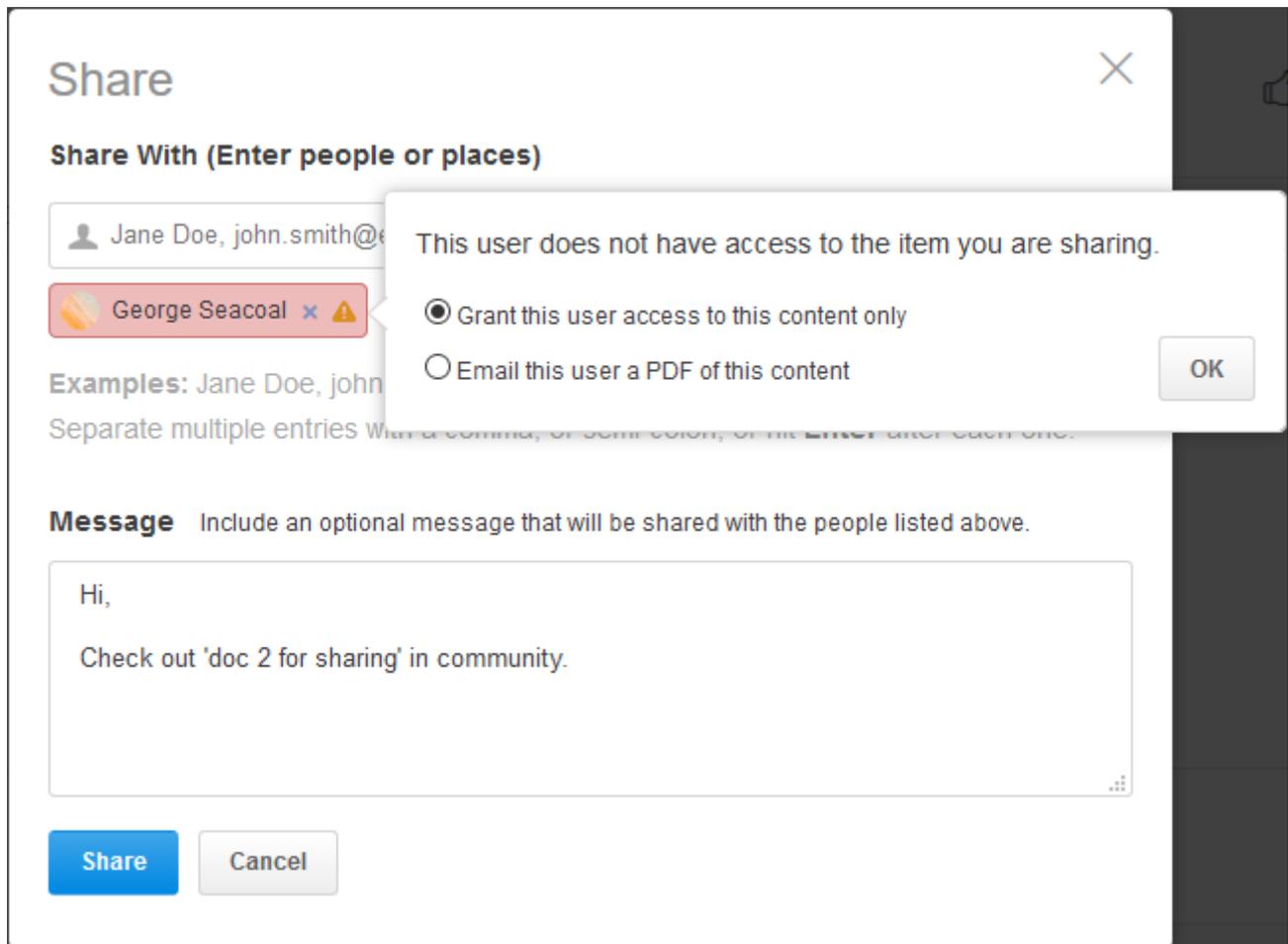
Hi,

Check out 'Discussion for sharing 2' in community.

Share

Cancel

- Co-authoring: The selected content item is made accessible to a community user for viewing and editing. The user effectively becomes a co-author of the content item.



**Note:** You can't share files that are stored in external storage, such as Google Drive.

How you can share a content item depends on whether you can edit this item or not.

If you are...	And the recipient is...	
	a community member but not a group member	not a community member
Group member and cannot edit the content item	<ul style="list-style-type: none"> <li>PDF export</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>
Group member and can edit the content item	<ul style="list-style-type: none"> <li>PDF export</li> <li>Co-authoring</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>
Group owner and cannot edit the content item	<ul style="list-style-type: none"> <li>PDF export</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>
Group owner and can edit the content item	<ul style="list-style-type: none"> <li>PDF export</li> <li>Co-authoring</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>
Community administrator with the Manage Social Group permissions	<ul style="list-style-type: none"> <li>PDF export</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>
Community administrator with the Full Access permissions	<ul style="list-style-type: none"> <li>PDF export</li> <li>Co-authoring</li> </ul>	<ul style="list-style-type: none"> <li>PDF export</li> </ul>

Note that in groups, documents and files can be co-authored by all group members, and both methods can be used for sharing. But questions and discussions can be co-authored only by their authors, other group members can share them only as PDFs.

## Sharing with non-group members

To share a document or discussion with a non-group member:

1. Go to the content item that you want to share.
2. Click **Share** in the menu.
3. Enter the name or email of the person with whom you want to share the item.

The user is added in a red box under the search box, and a notification with the sharing details is displayed.

4. If you have a choice for sharing, select one of the following and then click **OK**.
  - **Grant this user access to this content only:** Grants the selected user access for viewing and editing to the selected content item. The user becomes a co-author of the content item.
  - **Email this user a PDF of this content:** Converts the content item with comments to PDF and sends it to the selected user.

5. Under **Message**, type a note for the person.
6. Click **Share**.

You can see a green bar at the bottom of the screen letting you know the share was successful. You can also see an orange icon at the top that lets you know the item is visible to non-group members. You can click the provided link to see which non-group members the content item has been shared with.

## Sharing content with other places

*To make using the community easier for people who tend to focus on certain groups, spaces, or projects, you can share your content with their place even if you initially post it in another place. When you share content with a place, it shows up in that place's activity stream. Anyone following the place where the content is shared receives a notification in the stream.*

People who don't have access to the original content can not have access to the shared one either. For example, you post a Contact List document in the Human Resources group, and some Engineering managers have access to the Human Resources group, but they spend most of their time in their Engineering group. You could share the document with the Engineering group, which is open, and know that only the managers can search for and view the Contacts List document.

This feature is turned on by default in internal-facing communities.

To share content with multiple places:

1. Go to the piece of content you want to share, such as a document, blog post, or discussion.
2. Click **Share** in the menu.
3. Enter the name of the place you want to share the item with, or use the place picker to navigate to and select the place.
4. If required, add more places.
5. Type a note about the share in the **Message** box.
6. Click **Share**.

At the top, you can see the places it has been shared with so you can keep track. You can click the **x other places** link to see which other places the item has been shared with.

## 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
<b>Add tags</b>	Applies the same tags to all of the selected items.
<b>Add categories</b>	Applies the same categories to all of the selected items. You won't be able to select this if categories are not set up in your community.
<b>Set outcomes</b>	Applies the same outcomes, such as Outdated or Final, to all of the selected items.
<b>Move</b>	Moves all of the selected items to the new place you choose.
<b>Delete</b>	Deletes all of the selected items.

4. In the dialog box, review the list of items. If necessary, click **Remove** next to an item to remove the item from the list.
5. Click **Continue**. You may need to click another **Continue** depending on the option you selected.
6. Depending on the selected action, specify the settings or once again review the issue list.
7. Click **Continue**.

The selected action is performed, and the results are displayed in the dialog box.

8. Click **Close** to close the dialog box.

## Groups with external file storage

If your administrator has connected your community with an external storage provider such as Box, SharePoint, or Google Drive, you can take advantage of file storage and synchronization for groups where this is enabled.

Typically, the default is a binary storage archive on a server that's part of your Jive installation. When you create a group, you may have the option to connect it to a different storage provider than the default configured when your community was set up. Using external file storage means that when a user uploads a document, it's stored with a third-party file storage service instead of directly in Jive. Files can then be automatically synchronized in both directions, which means you can add or update them from either side. If the storage provider has comment functionality, comments are also synchronized with comments in the group.

---

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

---

## Groups with Box Storage

If your administrator has connected your community with a Box.com file store, you can take advantage of file storage and synchronization with Box for groups where this is enabled.

When a user uploads a document, it's stored in Box instead of the regularly configured binary storage location. Files are automatically synchronized in both directions, and so are comments and replies, so that users can interact from either the Jive side or the Box side.

---

**Attention:** Attachments are not stored in Box.

---

To take full advantage of the linkage, users should join the Box-linked group. This allows users to interact with Box-linked content under their own user accounts and synchronize comments correctly to the Box side. Otherwise, their interactions will be posted by a system user called the Jive Integration User, and their comments will not be visible on the Box side.

---

**Note:** Although you can connect an open group to a Box folder, only community members who have joined the group are able to see Box documents and have their comments reflected on the Box side. Because of this limitation, it's recommended to use the Box external storage only with Members Only (also known as Public: Restricted), Private, or Secret (also known as Private: Unlisted) Groups.

---

For more information, see [Box.com Integration](#) in the More Integrations Guide.

### Modifying files in Box

Files can be modified on the Box side by any user who has a Jive account and rights to the group-linked folder in Box. In addition, file comments made in Box are synchronized and displayed in the Jive group.

---

**Note:** There is a known limitation for files that have been deleted from Box, and then restored on the Box side. Restored files are not synchronized to Jive when they are restored. However, uploading a new version of the file to the Box side re-adds the restored version and adds the new version at the same time, resulting in two added files. Re-adding the file from the Jive side initially return a generic error, but the second upload attempt succeeds.

---

## Groups with SharePoint storage

If your administrator has connected your community with a SharePoint storage site, you can take advantage of file storage and synchronization with SharePoint for groups where this is enabled.

When a user uploads a document, it's stored in a SharePoint site instead of the regularly configured binary storage location. Files are automatically synchronized in both directions, as well as comments and replies, so that users can interact from either the Jive side or the SharePoint side. Users can also search inside the SharePoint site without leaving Jive.

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

## Groups with Google Drive storage

If your administrator has connected your community to a Google Drive storage site, you can take advantage of file storage and synchronization with Drive for groups where this is enabled.

When a user uploads a document, it's stored in Google Drive instead of the regularly configured binary storage location. Files are automatically synchronized in both directions.

For more information, see [Google Drive Integration](#) in the More Integrations Guide.

---

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

---

## Using content

Content takes up the major part of Jive, so learning to create, promote, and manage it effectively is a cornerstone of Jive collaboration.

## Creating content

You can create items of the types available in your community. You should choose a content type based on your collaborative goals.

To create a content item:

- Click , and then select the content type of the item.

For example, you can draft a discussion, question, document, or blog post.

---

**Note:** You may not see the Create menu () if your community manager disabled the feature.

---

Most collaborative activities occur in discussions, questions, and documents. Blog posts are typically used for viewpoint essays and other long-form communications that don't invite collaboration. For a more detailed analysis of the differences between these types of content, see [Differences between documents, blog posts, and discussions](#) on page 80.

### Private and public content

By default, the content you create is public in the community and searchable. The power of a community is that everyone in the community can benefit from shared content. However, in some cases, you may want to limit who sees content and who can collaborate on it with you. For more information about deciding who can see and collaborate on your documents, see [Using documents](#) on page 90. For more information about private discussions, see [Using discussions and questions](#) on page 87. You can also choose to publish your content in a private social group that limits content to approved members.

For more information about private and public content, see [Public and private communications](#) on page 182.

### Monitoring your content

You automatically follow all content that you create, so you receive an update notification in your Inbox whenever anyone responds to your content or changes it. This notification is updated whenever you or another user edit or comment on the content, or make another notable action. Note that if it is you who made the action, the notification is marked as read. And if the item has been updated by another user the notification is marked as unread, to attract your attention. If you have the **Unread Only** option selected, you will see only notifications about actions of other users. And if you do not want to receive notifications about this content item, click **Hide new activity** in the lower pane.

Note that you can delete any comments on your content if required.

For more information about Inbox, see [Tips for using Inbox](#).

### Updating or deleting your content

You can update any content item you created, as well as delete the content entirely.

## Using content editor

When you create or edit content, such as writing and formatting text, creating tables, embedding images and videos, and inserting links, you use the content editor built into Jive.

The editor includes many of the standard features of other word processing programs. You can access them by using either the icons in the interface or keyboard shortcuts.

Here are some features of the content editor you may want to explore.

### In-line @mentioning

To @mention someone while you are typing in the content editor:

1. Type the @ symbol (or click the @ button if it is available). A search dialog opens and suggests possible matches.
2. To narrow matches, use an underscore (\_) as a space. For example, @Mike\_D would match the Mikes whose last name begins with D.
3. Select the correct match from the list and note the new link in the content editor.

For more information about @mentioning, see [Alerts for people, places, and content items](#).

### Adding table of contents

The content editor includes a feature that automatically generates a hierarchical table of contents based on the headings in your content. When you insert the table of contents, the editor looks at the headings your content uses, including their levels (such as Heading 2 or Heading 3). Based on the heading levels, the editor creates links to the headings, indenting the links at similar levels.

- To insert the table of contents, click **More > Table of contents** .

While you're editing the content, the table of contents appears as an icon, as displayed in the screenshot below.



In the saved or published version of the content, the icon is replaced with a hierarchical list of links to headings in your content.

#### Working with tables

- [Adding and deleting tables](#)
- [Adding, duplicating, and deleting rows and columns](#)
- [Moving rows and columns](#)

## Working with tables

## Working with tables

The content editor table feature allows you to create and manipulate tables.

- To create a new table, click  > **Insert table** and select the number of rows and columns you want.
- To add, remove, or duplicate rows and columns, use the table menu to the right of the table or the  menu.
- To move around rows and columns, mouse over  and drag them as required.
- To merge cells, select the cells, then click  > **Cell > Merge cells** .
- To delete a table, click  > **Delete table** . The table is deleted.
- To format individual cells, rows, or columns, click  and then select the element whose properties you want to configure.

You can designate and format headers, change the color of text, lines, and background, and customize many other settings. Note that when you change the header setting while making changes in a column, only the header for that column changes, not all of the headers.

In addition, changing the color of text in properties changes the *default* text color setting for the selected cell, row, column, or table itself. To make text color changes that you don't want to apply as a default to the cell, row, or column, use the text color icon in the editor's toolbar.

When you are finished formatting your table, simply click away from it and continue editing your document.

## Using the spellchecker

The content editor includes a spellchecker that you turn on when you want to check the spelling. When you're ready to check the spelling in your document, click  . Misspelled words are underlined in red. You should click a misspelled word to view suggested alternate spellings and scroll down to select the best match.

Note that the spellchecker does not check spelling as you type. You must turn it on or off by clicking the spellchecker button. After you have made corrections, click the button again to recheck spelling.

Also, you can change the language used for spell checking by clicking the down arrow at the right side of  .

## Viewing code source for content

The content editor's Source Code feature allows you to edit your document in HTML. Click the < > link in the editor's toolbar when you want to write directly in HTML. When you're finished, you can toggle back to the default editor view by clicking **OK**. Clicking **Cancel** returns you to the content editor without making changes.

Some kinds of HTML markup can cause the site to be less secure. For this reason, certain HTML tags aren't supported by default. When you use these tags, Jive removes them before displaying the content. You can include them, and they are saved, but they don't render when someone views your content. Here's a list of what's not supported:

**Tags:** <embed>, <html>, <head>, <iframe>, <link>, <meta>, <object>, <script>, <style>

**Attributes:** action, class, method, on\* (such as onClick), \*src\*

## Using code syntax highlighter

The content editor's Syntax Highlighter feature allows you to mark text as code and specify the language so that it renders correctly in the saved and published versions of your document, blog post, or other content. This is useful to show code examples in your documentation. Supported code styles are Java, JavaScript, SQL, HTML/XML, CSS, PHP, Ruby, Python, C, C#, and C++.

- To apply the code formatting, click the **More > Syntax Highlighter**. The **Insert/Edit code sample** dialog box open where you can select the language-specific formatting and enter the code snippet. After you finish editing, click **Ok**.

Here are a few code examples.

SQL:

```
1 | UPDATE gelato
```

XML:

```
1 | <topic id="gelato">
2 | <section><title>Tin Roof</title>
```

## Working with links

When pasting internal URL in the default content editor, title will be automatically generated for that link. To include URL without having it automatically titled, use the **Insert URL** option. This way, the URL will be classified as independent link which you can modify to have its own title.

## 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** .

---

## Earning status points

When you create or respond to content in Jive, you earn status points in the community.

The success of the community depends on your contributions, so you are rewarded with points for getting involved. Over time, you develop a reputation for reliability and authority in your favorite areas. The more people participate, the more information that is available for the community as a whole. You can become a top participant in your community by earning status points.

### Checking your points

To find out how many points you have:

**Quick view** Hover over your name from anywhere in the interface. In the profile hover card, you can see your points and level listing, as well as any badges you have earned. For a more detailed view, click your name to go to your user profile.

Or go to a Latest Acclaim notification in your Inbox. Scroll down through the notification to see your points and how you rank in a list with other community users.

**Detailed view** Go to your user profile by clicking **your avatar > View Profile** or your name anywhere in the interface, and then click **Rewards**. There you can see a full listing of the badges you've earned, quests you've completed, your points total, and how many points you need to get to the next level.

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**Note:** In places, the Your Progress or Top Participants tile (which one you see by default depends on how your community is set up) shows your status points for your activity in that place only. You may notice that this tile shows different point levels depending on what place in the community you are looking at.

---

## Earning points

Because each community can be set up differently, you should ask your community administrator for details about status points. What activity is rewarded, status levels, badges, and points awarded may vary. Depending on how your community is set up, you may earn points and badges when you involve yourself in the following types of activity:

- Post a discussion or question, or respond to one
- Correctly answer a question
- Provide helpful information in the replies or comments of documents, discussions, and blog posts
- Create new documents
- Create new blog posts
- Complete new tasks in a project
- Create a new status update
- When someone likes your status update
- When someone shares your status update

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**Note:** When content is deleted, status points are also deleted.

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## Awarding badges and points

You can award other community members a badge to recognize their contributions, and even give them some of your status points.

If your community manager has enabled Jive Rewards, you can celebrate and thank other community members by awarding them badges, and optionally some of the status points you've earned yourself. Badges show up on the Rewards page, and the community member receives a notification that explains the reason.

To hand out a badge and optional points:

1. Go to **<your\_community\_url>/rewards**.

You can see the available badges at the top of the Badges tab.

2. Select a badge.

3. Start typing a person's name in **Give to**, and select their name. You can only give one person a badge at a time.

4. In **Add a personal message**, type a brief thank-you message, or explain why they're getting the badge.

For example, you could type "Thanks for answering so many customer questions!" This message is shown on the Rewards page and in the notification the user receives.

5. If you want to give points with the badge, move the points slider. Points are removed from your community total and added to theirs. Point levels affect leaderboards, but won't affect any missions that have already been earned.
6. Click **Give Badge**.

## Sharing content with other places

*To make using the community easier for people who tend to focus on certain groups, spaces, or projects, you can share your content with their place even if you initially post it in another place.*

*When you share content with a place, it shows up in that place's activity stream. Anyone following the place where the content is shared receives a notification in the stream.*

People who don't have access to the original content can not have access to the shared one either. For example, you post a Contact List document in the Human Resources group, and some Engineering managers have access to the Human Resources group, but they spend most of their time in their Engineering group. You could share the document with the Engineering group, which is open, and know that only the managers can search for and view the Contacts List document.

This feature is turned on by default in internal-facing communities.

To share content with multiple places:

1. Go to the piece of content you want to share, such as a document, blog post, or discussion.
2. Click **Share** in the menu.
3. Enter the name of the place you want to share the item with, or use the place picker to navigate to and select the place.
4. If required, add more places.
5. Type a note about the share in the **Message** box.
6. Click **Share**.

At the top, you can see the places it has been shared with so you can keep track. You can click the **x other places** link to see which other places the item has been shared with.

## Who can see my content

In Jive, people post content in places. This means that all content (such as discussions, documents, and blog posts) are published in a containing place (space, sub-space, group, or project). All places have visibility permissions (set by the place owners) that determine who can see the content posted in that place.

For more details on content visibility, see [Public and private communications](#) on page 182 and [Content visibility options](#).

## Creating hidden content

In addition, each user has their own personal container. Content that you set as **Hidden** before you publish it is stored in your personal container and is private to you. When you publish Hidden content, only you can see it as a content update in your streams; other users do not. For more information, see [Creating documents for yourself](#) on page 84.

## Limiting content to a few people

Alternatively, you can publish something in your personal container and select to show it only to **Specific People** whom you designate before you publish. In that case, only you and those other people can see the content and only those people can see it as a content update in their streams.

## Limiting content to multiple places

You can also publish in one place and share it with other places. As long as people have access to view the original content, they are also able to access it from the place you share it with. They can find it in the Content tab for that place.

## Limiting discussions and questions to a few people

Similar to other content types, you can publish discussions and questions so that only a few people can see them. For more information, see [Creating direct messages and private discussions](#).

## Saving a document or blog post as a draft

Another handy feature is Save As Draft which allows you to share a draft of a document or blog post with other users before you publish it. This is helpful for working together on a document or blog post before you publish it for a larger audience. Drafts are not visible in any streams. For more information, see [Saving drafts](#).

# Differences between documents, blog posts, and discussions

Documents, blog posts, questions, and discussions have different purposes and rewards. Here you find suggests ways to think about these content types.

## Documents

<b>Purpose</b>	Collaborate with others on a single document; capture information that should be available for a while; create a report, agenda, or meeting notes. For more information, see <a href="#">Using documents</a> on page 90.
<b>Format</b>	Most of the content is in the document itself; comments by readers and authors are appended.
<b>Style</b>	Somewhat formal, often in the third person.
<b>Stream updates</b>	Whenever the document is edited (and <b>Minor Update</b> is not selected), and whenever comments are added.

## Blog posts

<b>Purpose</b>	Express a point of view; call something to the attention of other users; make a proposal to get feedback from others; ponder an idea. For more information, see <a href="#">Using blogs</a> on page 103.
<b>Format</b>	Most of the content is usually in the initial post, with reader comments appended.
<b>Style</b>	Informal, usually in the first person.
<b>Stream updates</b>	Whenever comments are added. Edits to a blog don't trigger an update.

## Discussions

<b>Purpose</b>	Make a short observation or assertion to get feedback; report a problem. For more information, see <a href="#">Using discussions and questions</a> on page 87.
<b>Format</b>	Most of the content is in the form of replies to the initial assertion.
<b>Style</b>	Informal, usually in the first person.
<b>Stream updates</b>	Whenever replies are added, and whenever a reply is marked as Correct or Helpful.

## Questions

<b>Purpose</b>	Ask the community a question. For more information, see <a href="#">Using discussions and questions</a> on page 87.
<b>Format</b>	Most of the content is in the form of replies to the initial question.
<b>Style</b>	Informal, usually in the first person.
<b>Stream updates</b>	Whenever replies are added, and whenever an answer is marked as Correct or Helpful.

## Status update tips and tricks

Status updates let you interact with others in the community. You can also delete your own updates, see who liked them, see other people's updates, and several other activities.

<b>Interacting with others from status updates</b>	Comment on, share, follow, or repost a status update by clicking any of these commands in the footer of yours or other user's update.
<b>Limiting your status update to specific groups</b>	Share your update with only a specific group by clicking <b>Change</b> beneath the status box, and then selecting the group before you post. When you post a status update to a group, only members and followers of that group can see the update in their attention streams. If the Activity

page of the group includes Recent Activity tile, the status update is displayed there as well.

### **Deleting your status update**

Delete your own update by going to your Inbox and clicking on the time stamp in the update (for example, "posted 2 hours ago"). From the permalink page, click **Delete**.

Alternatively, you can delete an update by going to your user profile and clicking **Activity > Status Updates** . From there, click the update's time stamp, and then **Delete**.

### **Seeing who liked your status update**

Click the number next to **Like** in your status update to see the people who liked it.

### **Using tags in your status updates**

Insert one or more tags in your update by preceding keywords with a hash or pound sign (#) so that you and others can find the update more easily later. For more information, see [Using tags](#) on page 51.

### **Filtering by status updates**

Filter any of your attention streams by selecting **Filter > Status Updates**.

### **Seeing someone else status updates**

Click a person's avatar or name from any of your attention streams, or search for the person from the People finder or Spotlight search. Click on the person's name to go to their profile page, and then click **Activity > Status Updates** .

## **Categories of content**

Content categories associate content with keywords for easier searching later.

*Content categories* are words or phrases predefined by administrators within a particular place, such as a space or social group. If there are categories available in the place, it usually means that the place administrator has given thought to how that place content should be grouped. An administrator who creates a category can optionally associate certain tags with it.

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**Note:** Content categories are used only inside a single place and are different from the place categories that are used to tag and find groups, spaces, and projects.

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### **Applying categories**

To apply a category to a content item:

1. Open the content item for editing and scroll to the bottom.

Under **Categories**, you can see the list of categories that have been defined for the place of the content item.

2. Select the categories in which your content item seems to belong.
3. Click **Update** to publish the content item and assign the selected categories.

## Creating polls

You can use polls to get instant feedback on a question. A poll is a fast way to ask a multiple-choice question in the community.

When you create a poll, you define the question and the possible answers. For example, you could create a poll asking the community if your team should change a workflow process. A poll appears on the home page of the place in which it is created. As people respond to the poll, results are displayed graphically as colored bars. A person can vote only once in the poll.

### To create a poll

1. Click  > **Poll** .
2. In **Title This Poll**, enter a title for your poll.

The title appears above the list of options in the published poll, so you should use it as the poll question. For example, "Where should we have the holiday party?"
3. In **Choice 1** and **Choice 2**, enter answer options.

For example, choices for the holiday party poll might be, "In the office," "In a restaurant," "At someone's house," and so on. You can also add choices.
4. If required, add more choices by clicking **Add a Choice** and filling in a description for each choice.
5. Add a description to provide more information about the poll.

The description is displayed below the title, and above the options or the results, depending on whether the poll is completed.
6. Select where you want to publish the poll. To get wider participation, publish your poll to the entire community and then share it with people and groups who might be interested.
7. Under **Tags**, add tags to the poll for it to appear in searches.
8. If your poll will be published in a space, optionally select the categories to which this poll belongs.
9. To change the publish and end dates of the poll, do the following:
  - a. Under **Advanced Options**, select **Change voting options**.
  - b. Set the dates when you want to publish the poll (immediately or a specific date) and when you want voting to end (on a specific date, in a specified amount of days, or manually).
10. Click **Create Poll**.

The created poll appears in the place you have chosen.

### Excluding polls from trending lists

You can exclude your polls from the trending lists if necessary. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Events

Events allow you to schedule, discover, and RSVP to events from your Jive community or privately manage your own schedule. Events can be created in spaces, groups, projects, or your own personal container, like other content types.

For more information about events, see the [Jive Events Help](#).

## Creating documents for yourself

You can create a Hidden document to keep it private. Later, you can change the visibility to include other people if you need to.

If you don't want others to see your content, you can keep private documents, events, tasks, bookmarks, ideas, and uploaded files. You can either publish items as hidden or save as draft to ensure no one else can see it. For more information on which content types can be hidden, limited to specific people, or public, see [Content visibility options](#).

To create a document that is visible only to you:

1. Click  > **Document** or another content type.
2. When you finish editing, under **Publish Location**, select **Hidden** before you publish or save as a draft.

Similarly to documents, you can create other private content items.

To see your hidden content:

- Go to **Your Avatar > Your Content** in the main navigation menu, and then click **Authored** in the left sidebar.

From there, you can edit your content items and keep them hidden, or you could make it visible to other users by changing the visibility options before publishing. You can also filter content by type.

## Saving drafts

You can use the Save As Draft feature to quickly jot down and save your thoughts in documents or blog posts. Then, you can come back later to edit and publish your

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content. You can also collaborate with others on saved drafts before publishing them.

You can save blog posts and documents as drafts. This can be useful if you need time to finalize your thoughts before publishing something. Additionally, drafts are not visible in any streams.

### Creating and editing drafts

To save a blog post or a document as a draft:

1. Create and fill in a document or blog post.
2. Click **Save Draft**.

The document is saved as a draft and is not visible to anyone. You can find it on the **Drafts** tab of **Your Content**.

To edit a draft:

1. Go to **Your Avatar > Your Content** in the main navigation menu, and then click **Drafts** in the left sidebar to see your drafts.
2. If required, filter your Drafts results by documents or blog posts.
3. Click on the draft to edit the content.
4. Click **Publish** to save and publish the draft.

You can edit the content and save it again as a draft, or publish it.

### Collaborating on drafts

You can collaborate on drafts of blog posts or documents before you publish them or share an existing draft with other users.

To get people to collaborate on an existing draft:

1. Open the draft.
2. Click **Share** in the upper right corner of the page.
3. In the **Share** dialog box, select the people you want to share the post with and include a message for them.
4. Click **Share**.

The recipients are able to edit the draft and either save it as a draft or publish it.

## Using user profiles

Use your profile to express who you are to your community. If you have something you want the community to know about you, add it to one of the cards that can be found here.

Your profile also shows everyone what you've been working on, who you're connected to, the recognition you've been getting, and the groups you've most recently visited.

## Setting up your profile

Setting up your profile is the first step to participating in the community.

Your user profile provides community members with an easy way to learn about your skills and interests. Your profile shows up in search results when community members search for keywords contained in your profile. You can update your information at any time.

To set up your profile:

1. Go to **Your Avatar > Edit profile** in the upper right corner.
2. On the **Avatar** or **Photos** tab, change your avatar and manage your photos.

Your avatar and other photos let people see and recognize you in person. Your avatar lets community members quickly associate your comments and status updates with a simple visual cue.

3. On the **Profile Details** tab, fill in as much profile information as you like.

Note that your profile can be found when people search, so if you have professional roles or interests that would be useful for others to know about, you should include them. You may not be able to edit certain fields, such as username. Usually, the community manager sets up these fields for you.

4. On the **Privacy** tab, edit your privacy settings.

These control how different types of users see your profile. For more information on privacy settings, see [Setting up content visibility options](#).

5. Click **Finished**.

The profile is set up and becomes available in search.

## Adding and endorsing skills

You feature skills on your profile by adding them, and you endorse other user's skills by going to their profiles.

Skills not only provide more information about others in your community, but they also tag people with those skills, so when you search the community for users, you can filter by skills.

To add skills to your own profile:

1. Go to **Your Avatar > View Profile** to view your profile.
2. Under **Skills**, click **New skill** and type your skills.

Select a tag, or create a new one—just type a word or phrase and press `Enter` to turn it into a tag.

3. Click **Add** to save your skills.

To endorse the skills of another user:

1. Go to their profile.
2. Under **Skills**, click **Endorse** and type their skills.
3. Click **Endorse** to save the skills.

Community users need to accept new endorsements via an Inbox notification before they show up in their profile. You can see new skill alerts in your activity once community users approve endorsements. To back up an existing endorsement, click the plus sign next to the skill listed in their Skills card.

## Setting up content visibility options

If you're concerned about privacy, you can limit who sees different parts of your profile by editing your privacy settings.

To limit profile visibility:

1. Go to **Your avatar > Edit Profile** .
2. Go to the **Privacy** tab.
3. For each profile field, select who can view it.

Your community administrator may control who sees certain fields, such as those without a **Visible to** option.

4. Take a look at how others can see your profile by using the **Preview your profile** option in the upper right corner of the page.
5. Click **Finished** to save the changes.

## Using discussions and questions

Use questions and discussions to ask questions or introduce new ideas to the community.

Discussions and questions are a quick way to get an answer to a question or feedback on an idea. You can attach a file or insert an image, video, or code example into a discussion to better explain your question or idea.

### A questions or a discussion?

Here's the difference between these two content types:

**Discussions** A discussion can help you get feedback on your latest idea or assertion, for example, "The Accounting team needs feedback on the new expense reporting process" or "To fix or not to fix the old copier on the third floor..." These kinds of open-ended questions or ideas can encourage a good discussion in the comments. You or other users can mark any of the replies as the Decision, a Success, or for Action. For more information, see [Using Marking feature](#) on page 149.

**Questions** A question can help you get a quick answer to a burning question, for example, "Have you seen my red stapler?" or "How many pieces of

flair are required on our uniforms?" Anyone can jump right in to answer your question in the comments.

## Creating questions and discussions

- To start a new question or discussion, click  > **Question/Discussion** .

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**Note:** You may not see these options depending on how your community is set up.

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For either a question or discussion, you can attach a file or insert an image, video, or code example to explain your question or idea to the community better.

Later, if you want to transform a question or discussion into a document, you can save it as a document. For more information, see [Converting discussion or question threads to documents](#).

## Tips and tricks

- If you want to keep track of unanswered questions in a place, use the Unanswered Questions tile on the place's Activity page. For more information, see [Adding tiles to Activity page](#).
- If someone replies to your question or discussion with useful information, it's good practice to mark their reply as either Helpful (discussions and questions) or Correct (questions only). That way, others who have the same question or thought can quickly see which replies are the most useful. A Helpful reply is on the right track, while a Correct reply answered the question. Correct and Helpful answers earn status points for their creators. Note that only system administrators, place owners, and question authors can see the Correct Answer option. For more information about status points, see [Earning status points](#) on page 77.
- Tag discussions and questions, so that others can search for and benefit from them later.
- You can set discussion replies and content comments to be displayed all on one level (flat) or indented hierarchically (threaded). For more information, see [Flat and threaded views in discussions and questions](#) on page 89.

## Choosing where to publish discussions and questions

When you're ready to post the question or discussion, you need to decide how and where to make it visible. Carefully choosing a space or social group makes the question or discussion more visible to people who follow the place where you publish it. For example, publishing a question about technical support in the IT group can ensure the question is displayed in a stream for users who follow or belong to that group.

Your discussion or question also inherits the permissions of the place where you publish it. Therefore, publishing in a members-only group limits participation to people who are members of the group. If you want community users to be able to search for and stumble across your question, don't publish it in a private group.

On the other hand, if you need a question or discussion to be confidential, you could publish in a private group. You can also choose to publish your question or discussion only to specific people.

## Excluding discussion and questions from trending lists

You can exclude your questions and discussions from the trending lists if necessary. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Flat and threaded views in discussions and questions

You can set discussion replies and content comments to be displayed all on one level (flat) or indented hierarchically (threaded).

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**Note:** Replies to questions are shown in a unique order: the Correct Answer is always shown at the top, followed by replies with the most Helpful marks.

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### Discussion views

The flat and threaded views look like this.

#### Flat view

In *flat* view, you can see comments and replies chronologically in the order they were received, and there is no indentation between responses. This view can be helpful if you like to see comments in the order they were made. However, it can become difficult to follow conversations between people when a discussion is longer than a few comments.

The screenshot displays a flat view of a discussion thread. It features three replies, each with a user profile picture, name, timestamp, and response text. The replies are ordered chronologically. Each reply includes a 'Re: Accounting Offsite Ideas?' header and an 'Actions' dropdown menu.

- Dorothy Sayers** Oct 10, 2014 9:58 AM (in response to Ngaio Marsh)
  1. Re: Accounting Offsite Ideas?
 

I second Rose City Park. Great place and amenities.

Actions ▾
- Agatha Christie** Oct 10, 2014 9:59 AM (in response to Dorothy Sayers)
  2. Re: Accounting Offsite Ideas?
 

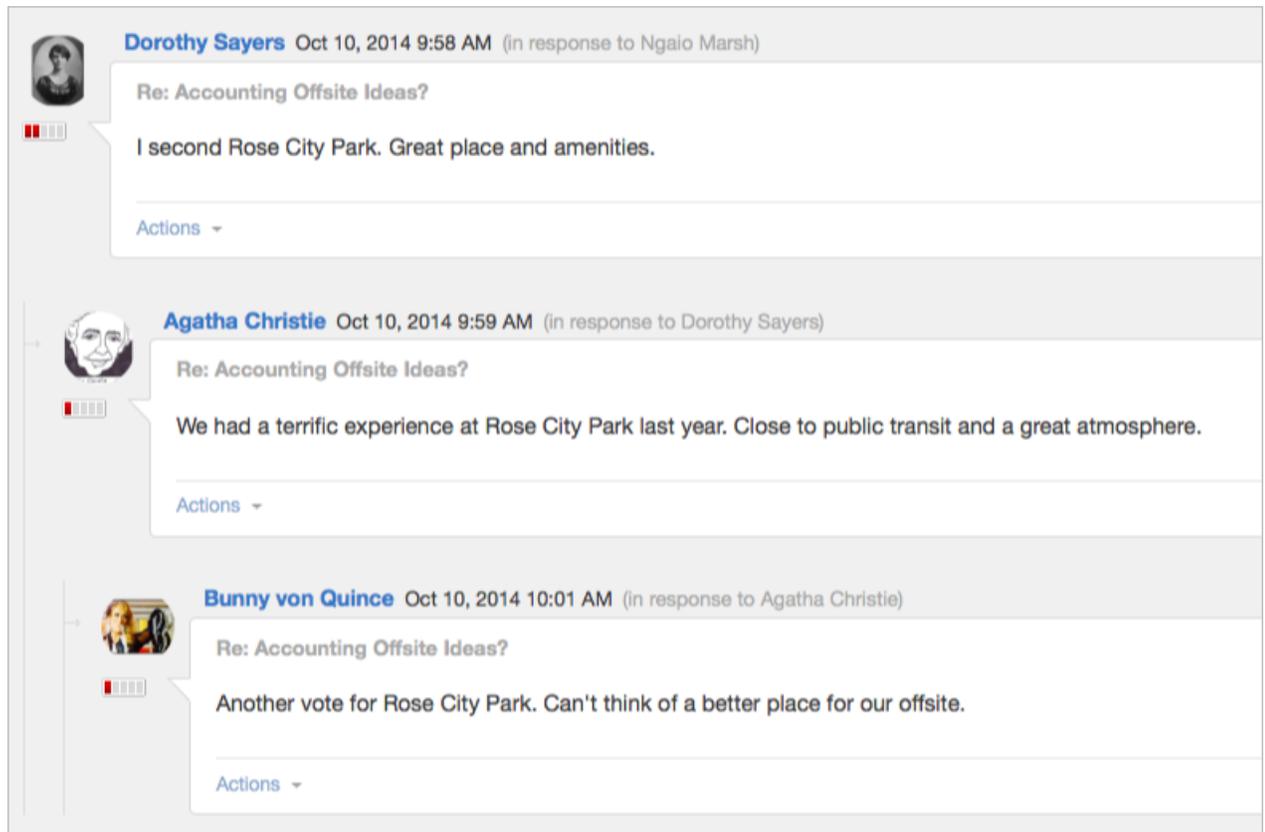
We had a terrific experience at Rose City Park last year. Close to public transit and a great atmosphere.

Actions ▾
- Bunny von Quince** Oct 10, 2014 10:01 AM (in response to Agatha Christie)
  3. Re: Accounting Offsite Ideas?
 

Another vote for Rose City Park. Can't think of a better place for our offsite.

Actions ▾

**Threaded view** In a *threaded* view, you can see which post a person is responding to because comments and replies appear indented beneath the post to indicate embedded replies or comments. This can help you follow conversations because responses remain associated together visually.



## Setting up discussion view

To set up your view style preferences:

1. Go to **Your Avatar > Preferences** in the upper right corner.
2. On the **General Preferences** tab, select your **Discussion View Style** and **Comment View Style**.
3. Click **Save** to save and apply the changes.

## Using documents

Jive is a powerful tool for creating and uploading documents, collaborating on them with others, and managing versions.

You can create documents in Jive or upload documents from outside of Jive, such as Microsoft Office documents or Adobe PDFs. Documents can be available for viewing or editing only by you, a group of people you designate, or the entire community. For more information about uploading external files to the community, see [Uploading files to Jive](#) on page 92.

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You can also view and manage the changes between versions of a document, including restoring a previous version so that it is the current version.

- To create a document, click  > **Document** and start writing.

### Choosing where to publish a document

When you're ready to save the document, you can decide how and where to make it visible.

Choosing a place, such as a space or social group, makes the document more visible to group members who follow the place where you publish it. For example, publishing your schedule document in the Sales Kickoff Planning group highlights your planning for anyone who's following that group in a stream.

Your document also inherits the permissions of the place where you publish it. Publishing in a private group, for example, limits the viewers of your document to the people who are members of the group. If you want community users to be able to search for and stumble across your document, don't publish it in a private group. On the other hand, if you need a document to be confidential, a private group could be the right place.

### Controlling who edits documents

Even when you publish your document in a public place, you can still control who can edit it. After you add the text for your document, scroll down the page and use the Collaboration Options to set the editing and commenting permissions. You can also specify that another user must approve the document before it is published. For more information, see [Document approval](#).

If you want to be the only one who can see your document, select **Hidden**. You can add more people as viewers or collaborators later if you change your mind.

### Managing versions

When a document has been edited and published multiple times, you can view and manage the differences between versions and delete specific versions, or restore a previous version so that it is the current version.

To manage a document's versions:

- Click **Version** to view a particular version, compare changes between versions, or restore a particular version.
- Click **Actions > Manage versions** to view the version history, restore a version to be the current version, or delete a version.

### Excluding documents from trending lists

You can exclude your documents from the trending lists if necessary. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Uploading files to Jive

You can upload a variety of files to the community to collaborate on them with others.

Depending on how your community manager has set up your community, you can upload a variety of external file types such as Microsoft Word documents and Adobe PDFs. After you have uploaded a Microsoft Word, Excel, PowerPoint or PDF external file, you can view and navigate through a preview view of its pages.

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**Note:** If you have Jive for Office, you can manage and sync the document with the community while working within Office (Windows only). For more information about this, see [Working with shared office documents](#) on page 94.

---

Uploading a file is a great way to include an externally-authored document or track its progress. For example, you can upload a Word document, then add collaborators so that it gets reviewed in Jive by other team members.

Be careful when uploading documents with proprietary fonts applied. Due to legal restrictions, these fonts cannot be imported with the document, and the unsupported fonts are replaced with the one of the supported. This sometimes causes texts formatted with proprietary fonts to look strange in Jive preview.

### Uploading a single file

To upload an external file to Jive:

- Click  > **Files** , then click to select the file you want or drag and drop it into the interface.

If your community manager has enabled the antivirus feature, there may be a slight delay while the file is being scanned for viruses. For more on where to publish, and controlling who edits, see [Using documents](#) on page 90.

### Uploading multiple files

You can use the same procedure to upload up to 50 files simultaneously. (Some communities may have a different setting). Files are named automatically based on their original filenames. However, you can edit the names afterward for greater clarity.

You don't need to worry about filling the activity stream with notifications or sending multiple email notifications when you upload more than one file. The notifications are bundled together into a single notification. If there are only a few, you can see previews of the files in the stream.

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**Note:** The Multiple File Upload feature does not work on Internet Explorer 9. You can only upload a single file at one go. To avoid this issue, it is recommended to use the latest version of Internet Explorer or another supported browser. For more information, see [Supported browsers](#).

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## Excluding files from trending lists

You can exclude your uploaded files from the trending lists if necessary. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Reserving files and documents

Marking an uploaded file or a document as Reserved indicates that someone is currently editing it so that other users shouldn't edit it until the Reserved badge is removed. It does not actually lock the file or document.

The Reserved badge provides important information about file status for anyone who can't use Jive for Office to edit and merge uploaded files, for example, Mac users. It can also be used to warn users of a published Jive native document that's not ready to be edited by other people yet. The Reserved badge doesn't prevent anyone else from editing, but it shows information about who is working with the item, making it easy for other people to check in with you before adding their own edits. Note that if you want to hide an in-progress Jive document before publishing it, you can just save it as a draft and share it with anyone you want to.

When an author or editor marks a file as Reserved, anyone can see who reserved the file and contact the person if they're unsure whether it's OK to proceed with editing. Anyone with the rights to edit a file or document also has rights to mark it as Reserved. When someone reserves a file, the author and anyone who has already edited the document receive an Inbox notification. You can filter content to find reserved documents, too.

## Differences in reserving Jive documents and uploaded files

<b>Jive native documents</b>	Jive already provide an indicator when someone has started editing a document. (However, note that the lock on the document while someone is editing only lasts ten minutes, and after that, it's possible to edit the document and overwrite another user's changes.) Mark as Reserved replaces the need to put "WIP" or another indicator in the title when a document isn't in a state where you'd like other users to contribute. It shows an author or editor's intention to keep working on the document undisturbed until the next time that the author publishes it.
<b>Uploaded documents</b>	Mark as Reserved warns users who don't use Jive for Office that publishing a new version could overwrite and invalidate a version someone is working on locally. (Windows users with Jive for Office have live merge capability and may not need this feature as much.) Marking a file as Reserved does not lock the document or prevent uploading another version. But any other user who clicks <b>Edit</b> with the intention of uploading a new file can see a message pointing out that the file is currently reserved for editing.

## Marking as Reserved

You can reserve a document or file to alert other users you're working on it. This doesn't lock the document, but it alerts other users that you are planning to update the item.

Reserving documents is especially useful if you're using uploaded files, but can't use the Jive for Office. The Reserved badge doesn't prevent anyone else from editing, but it shows information about who is working with the item, making it easy for other people to check in with you before adding their own edits. For more information, see [Reserving files and documents](#).

To mark a file as Reserved and remove to remove the marking:

1. Go to the document or file you want to reserve.
2. To mark the content item, click **Actions > Mark as Reserved** .

The Reserved badge is added at the top of the document.

3. To free the file for editing, use any of the following:

- Click **Unmark** next to the Reserved label on the document or file page.
- Publish the item. When you or anyone else publishes a new version, the Reserved badge is removed.
- Mark it as Final, Official, or Outdated. These markings override Reserved, and the reserved badge is removed.

## Working with shared office documents

*With Jive for Office, you can share your Office documents with others in your online community.*

*As you make changes to a shared document on your computer, Jive for Office synchronizes the document with the version that's visible in the community and provides real-time notifications to users working in the same document. The notifications tell users that content has changed and give them the option to incorporate the changes into their version using a merge tool. This keeps the content on the community up to date but also synchronizes comments, tags, and collaboration settings between the community and your document.*

This feature is supported for Microsoft Office running on Windows. For more information about supported Office versions, see the [Jive for Office Guide](#) or the [Jive for Office 365 Guide](#).

If you have the appropriate permissions, you can edit everything but the content of a shared document in the community. In the community, you can edit descriptions, tags, and categories, and you can use an Office program to edit the document content.

---

## What you can do

With Jive for Office, you can upload Microsoft Office documents to your community, then keep changes to the document in sync while you work in Office.

In particular, with Jive for Office you can:

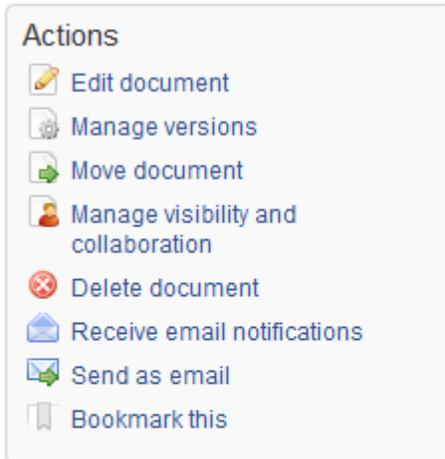
- Upload Office documents to your community without leaving Microsoft Office. When you upload a document, the community displays a preview of the document. However, the document must still be edited by using Microsoft Office.
- Use Jive in the Office toolbar ribbon to:
  - Change collaboration options to indicate who can edit the document in the community.
  - Create a document for your community.
  - View the currently published version of your local document in your community.
  - Share your document with others.
  - Check for updates to the document.
- Use the Dashboard to:
  - See who else is editing the document.
  - See how many people viewed the document, who created it, and who's contributed to it.
  - View, add, delete, and reply to comments.
  - View and add tags to help categorize the document in the community.
  - Edit the document's description.
  - View older versions of the document.
  - Rate the document and see how others rate it.
  - Browse files similar to the open file.
  - Take a look at more files created by the author.

## Getting Jive for Office add-on

*You need the Jive for Office add-on to share documents between Office applications and your community, which requires Microsoft Windows. If you don't have the add-in, you can get it when you're viewing an uploaded Office document in the community.*

To get the Jive for Office add-in:

1. In your community, go to an Office document.
2. To the right of your document, click the **Download Jive Connects for Microsoft Office** link as shown in the following image.



## Getting connected to your community

After you first install Jive for Office, it might not be completely set up to connect to the community you want to synchronize documents with. To connect, you need to provide your user name and password.

To get connected to your community:

1. In the **Jive** menu, click **Accounts**.
2. Click **Add** to add your Jive account.
3. Enter the **Community URL**, which is the exact URL that you use to navigate and login to your community.
4. Enter your Jive user name and password.

Now that you connected to your community, you can add documents to the community. For more information, see [Adding documents to community](#) on page 97.

## Adding documents to community

To have an Office document appear in the community, you can either add it using Jive Connects for Microsoft Office or upload the document from inside the community.

### Adding documents from the Microsoft Office side

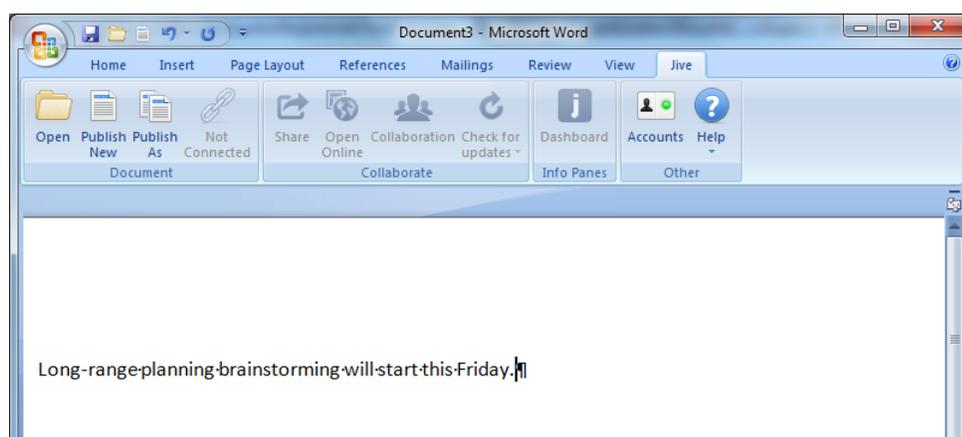
To add a document using Jive Connects for Microsoft Office:

1. Connect to the community. For more information, see [Getting connected to your community](#) on page 96.
2. Open or create a document in Microsoft Office.
3. Click **Jive > Publish New** as shown in the following image.

---

**Note:** Once the document is added to the community, clicking **Publish Update** uploads your changes to the community.

---



4. In the dialog box, navigate to the place in the community where you want to save the document.
5. In the **Document Name** box, enter the name at the bottom of the dialog box.

You can also add tags to help other users find your document in the community; provide an optional description; and decide who can edit your document. Also, you can change the local file location for your document by editing the **Store At** path.

---

**Note:** You don't need to save your document or changes to your document locally before publishing to Jive.

---

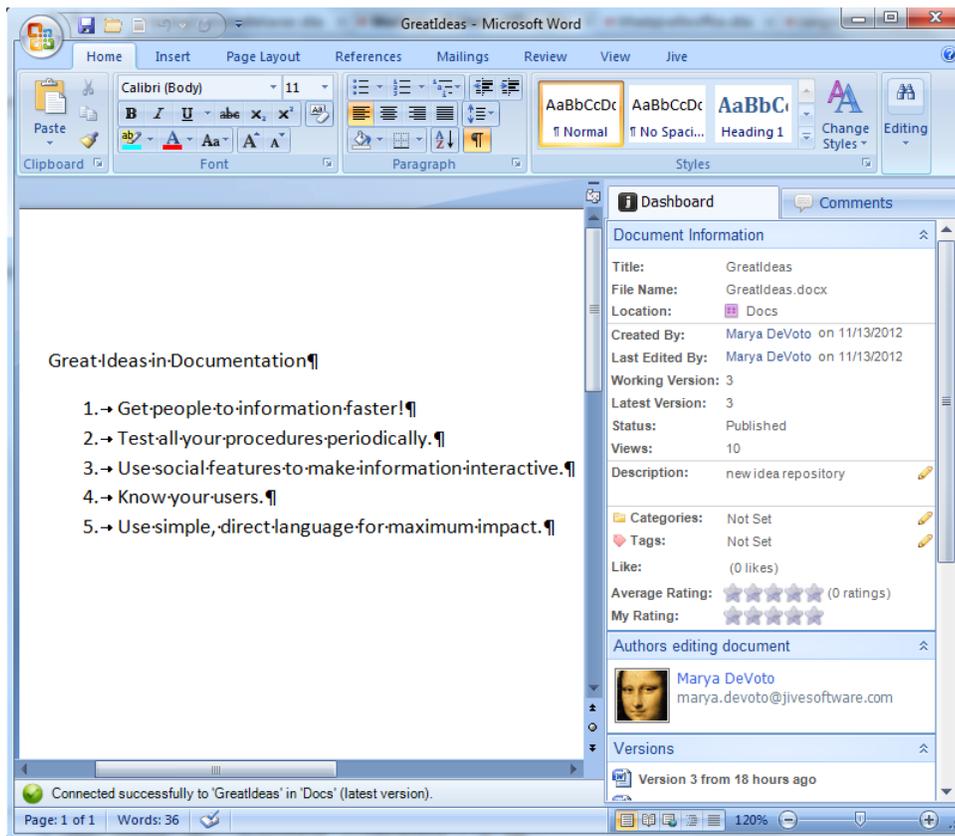
6. Click **Save**.

7.

You can synchronize the uploaded documents with the rest of the community. For more information, see [Keeping documents synchronized](#) on page 99.

**Attention:** When you add an Excel spreadsheet to a community, Jive for Office adds a hidden spreadsheet that contains a copy of the original spreadsheet with additional metadata. This copy is used to track changes and allow collaborative working on the spreadsheet.

Once the document is added to the community, you can click **Jive > Dashboard** to display a panel of information about the document, such as comments, ratings, and the current version number. The following image shows the Dashboard.



## Adding documents from the community side

To add a document from inside the community:

1. From your community, click  **(Create) > Document** .
2. Select **Upload a File**.
3. Select the location for your document.
4. Click **Choose File**.
5. Select the file from your desktop.
6. Click **Publish**.

Depending on the size of your document, it might take a few seconds to upload it.

---

## Create a new document from an existing one

To avoid a few steps, you can just upload an existing document and rename it as a new document to start fresh within the community. This creates a newly uploaded document in the community, leaving the previously uploaded document in the community as it was when you last synchronized. The new document will have the content of the previous one, but won't have its other properties, such as comments, collaboration settings, tags, and so on.

---

**Note:** Making a new document in this way leaves you with an Office document that has the same content, but without all of the community-related information. To get the previous Office document with that information, go to that document's page in your community and click the **Download** link beneath its preview.

---

To create a new document from an existing uploaded document:

1. In Office, open the document you want to start from.
2. Select **Jive > Publish As** .
3. In the dialog box, navigate to the place in the community where you want to save the document.
4. In the **Document Name** box, enter the new name at the bottom of the dialog box.
5. Click **Publish**.

## Keeping documents synchronized

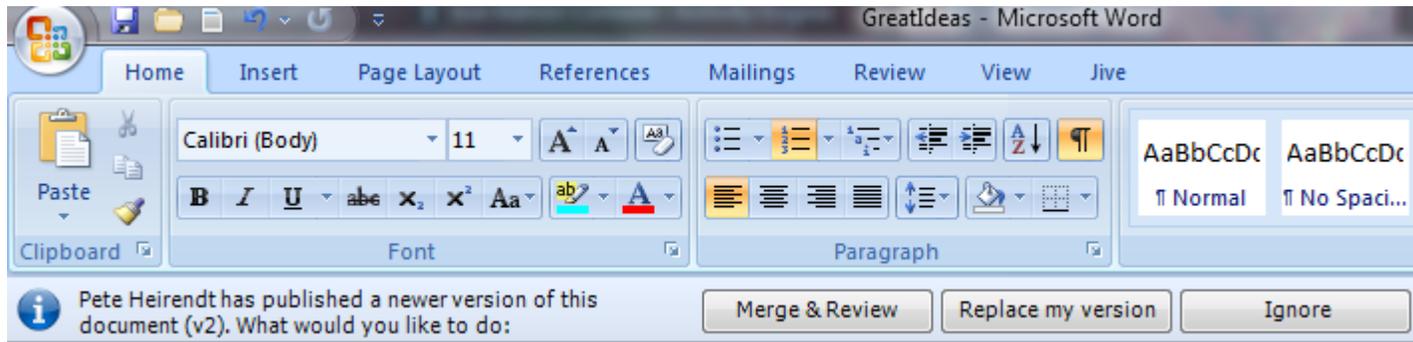
After you've connected your community to Office, Jive Connects for Microsoft Office keeps your documents synchronized with the community.

Jive for Office does the following:

- Updates the document preview in the community when you save changes to the document's content.
- Updates the Office document comments list with comments made in the community.
- Lets you see updates from others in your community and review them before using them.
- Keeps changes to community-related document properties in sync between the Office application and the community. When a change is made in one place, it shows up in the other. You can see the following properties in the Dashboard:
  - Tags
  - Categories
  - The document's title
  - The document's description
  - Revision activity
  - Document's state

To get document updates from the community:

1. When your document has been updated by someone in the community, you get a real-time pop-up notification. Alternatively, you can also click **Check for Updates**.



2. If there are no changes, a message tells you so. Otherwise, you can select how you want to deal with the changes:
  - **Replace my version** to accept the newer version, overwriting your own local changes. (You can also **Overwrite Local Version** from the Jive toolbar at any time if you want to discard your local work and start over with the published version.)
  - **Merge and Review** to review which changes you want to use.
  - **Ignore** to continue working without accepting or rejecting changes at this time.
3. When you're done working, save your changes so others in the community can see your recent changes.
4. If at any time you want to overwrite the current local document with the version on the community, click **Check for Updates > Overwrite local version** in the Jive toolbar.

## Working with document versions

*As you work on a document in Office, Jive Connects for Microsoft Office keeps track of changes, including community-related information such as comments. It can sync your changes with what's going on in the community with the click of a button. You can even view the changes that have been made since previous versions of the document while in Office. You can also save a previous version as the current one.*

---

The version management feature does its work in part by using the change tracking feature built into Office. That means that if you download a document that someone has made changes to, you might see revision marks placed there by the change tracking feature. The document is fine, but the revision marks can make it hard to read. You can hide the marks in the following ways:

- In Word 2007 or 2010, select the **Review** tab. In the **Tracking** group, select **Final** in the **Display for Review** menu to hide the changes.
- In Word 2003, locate the **Reviewing** toolbar. In the **Display for Review** menu, select **Final**.

### Work with document revisions

Jive Connects for Microsoft Office creates a new version of a document whenever you save changes to the document.

To view previous versions of a document:

1. Open a community document. You can see the dashboard on the right. If you don't, select Jive in the toolbar and click **Dashboard**.
2. Under **Versions**, if the version you want to see isn't visible, scroll down to display it. Previous versions are listed with the date and time when they were saved. If you hover over a version, you can see the name of the person who published that version.
3. From the list of versions, click the one you want to view.

---

**Note:** You can't save a previous version as the current one. To recover a previous version, open that version and publish it under a new name.

---

### Work with document activity

Jive Connects for Microsoft Office displays a list of activity related to the document. This activity includes versions saved and comments added. By clicking certain items in the activity list, you can add information to it. For example, you can view and add comments from the **Comments** tab.

To view document activity:

1. In Office, click **Jive** and then click **Dashboard**.  
In the **Overview** panel, you can see details about the document, such as when it was last edited and what version you're looking at.
2. Click the arrows next to tags, categories or description to add or edit this information and have it show up in the community.
3. In the **Comments** tab, click **Reply** to add a comment to the open document. These comments show up in the community as comments. For more information, see [Adding comments](#) on page 102.
4. You can also browse other documents that the author has created or documents similar to the open document.

## Adding comments

*When you comment on a document in Office or the community (as opposed to adding inline comments in the body of a document), your comments are synchronized and appear in both places. When you add inline comments in either location, these comments are visible where they are created, but are not synchronized or visible from the other location.*

There are two kinds of comments for shared Office documents:

- *Document comments* are like those people make elsewhere in the community. People can usually comment on shared documents just as they comment on other kinds of documents. These are added in the community or in Office. You can see these in Office when you go to **Jive > Dashboard** and then click the **Comments** tab.
- *Inline comments* appear in the document itself. An inline comment is a way to add a comment to a particular part of the document. When you add an inline comment in the community, it shows up in the community on the **Inline Comments** tab at the bottom of the document, as well as in the document preview, but is not visible in Office. Inline comments you create in Office can be seen in the **Review** tab when you select **Final Showing Markup** in the Tracking group, but cannot be seen in the Jive community.

To add a document comment:

1. In Office, go to **Jive > Dashboard** , and then click the **Comments** tab.
2. Type your comment.
3. Click **Add**.
4. You can also click **Reply** to reply to an existing comment or **Delete** to delete an existing comment.

## Adding collaborators

You can add collaborators to work on your Office documents.

By default, when you use for Office to add a document to your community, the document's collaboration options are set as follows:

- Only you can edit the document when you save to your personal container.
- Anyone can edit it when you save it to an open place.

You can change these defaults to fit the document needs.

---

To change collaboration options:

1. On the **Jive** toolbar, click the **Collaboration** button.
2. In the dialog box, select the option to set who can edit:
  - **Specific people**: Only the people whose names you choose can make changes. If you select this, begin typing the person's name in the box beneath **Specific people**. When their full name appears, click it to add it to the list.
  - **Just you**: Only you can make changes to the document's content.
  - **Anyone**: Anyone in the community can make changes.
3. Click **Update**.

## Using blogs

Use blog posts to express ideas or opinions and get community feedback. If you've got something to say, you can write it in a blog.

- Use your blog to express opinions, call attention to noteworthy items you've seen (such as an article on the Internet), or make proposals.
- Because other people can comment on your blog posts, they are a great way to pitch ideas that could impact the team or the organization. Of course, you can comment on other people's blog posts, too.
- Your community might include several blogs, for example, "Bill's Blog" (with posts from Bill) or "The Human Resources Blog" (with posts from people in the HR department). Your administrator can also create personal blogs and associates them with particular people or teams.
- If you want to see some of the blogs in your community, go to **Your Avatar > Your Content**, select **All** on the left, and then click **Blog Posts**.

You can see the latest blog posts from around the community.

### Adding blog posts

To start a new blog post:

- Click  > **Blog post** and write a post.

If you haven't created a blog before, you get a choice between setting up your own personal blog and posting in a blog belonging to a particular place. Place blogs typically relate to the subject matter of a group or space.

After you've written some content and decided where to publish it, you can also decide whether to publish it right away by clicking **Publish**, or whether to schedule it for a later date. Select **Schedule when this post gets published** and then select the time and date you want.

## Managing blogs

When you manage your blog or your place blog, you can create new posts, view and post comments, import content from an external blog into your Jive blog, subscribe to your blog's comments, and set other options.

To manage your blog:

1. Go to **Your Avatar > View Profile** .
2. Click **Content** and click on your blog's name to go to your blog's home page.

---

**Note:** You may not see your blog if you haven't created any blog posts.

---

3. Click **Manage** in the Actions list on the right.
4. Use the options in the right sidebar to manage your blog.

If you are a place owner, you can manage your place's blog, too. From your place's landing page, go to the **gear icon > Blog** .

## Designing blog posts

You can choose to arrest visual elements for your blog post, including images and an enlarged initial capital.

Some blogs are more word-focused and others are more image-packed. However, you can use the following information and best practices to help make your blog posts look good:

- Include a banner image at the top. If you choose a wide image, you can select which part is displayed by using the Background Position controls while you're selecting the image. The image scales to the size of the browser or screen and fills the banner area, so you can see some variation in how the banner is presented. An image 1200 x 500 pixels typically works well.
- If you want to use a decorative initial capital, select **Enlarge the first letter in the blog post**.
- Change the size of inline images by using drag and drop. To return an image to its original size or change its alignment in relation to the text, click the image and then the image icon.

### Excluding blog posts from trending lists

You can exclude your blog posts from the trending lists if necessary. For more information, see [Removing content items from Top and Trending](#) on page 76.

## Importing content into blogs

If you have content from another blog that you want to bring into your Jive blog, you can import it. Jive supports blogs in the Movable Type format.

If you've got a blog in Jive, you can import content from your other blogs. You need to first export content from those blogs into the Movable Type import format. Some blogging tools support this option.



This option may be not unavailable in your community. For more information, see [Customizing notifications](#).

## Images and collections in places

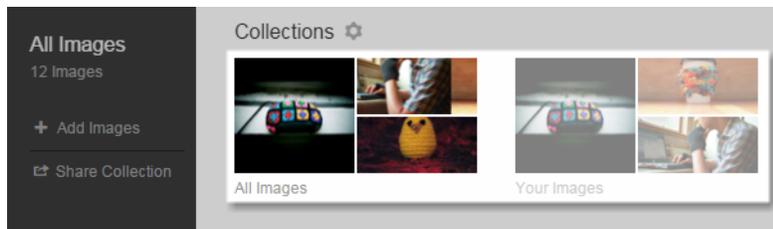
*Jive places can be more engaging with sharing and saving sets of images through collections. From the **Images** tab, you can view all of a place images, gather images into collections for viewing together, and share collections with others.*

A *collection* is a group of images in a place that is gathered on filters and sorting that you select.

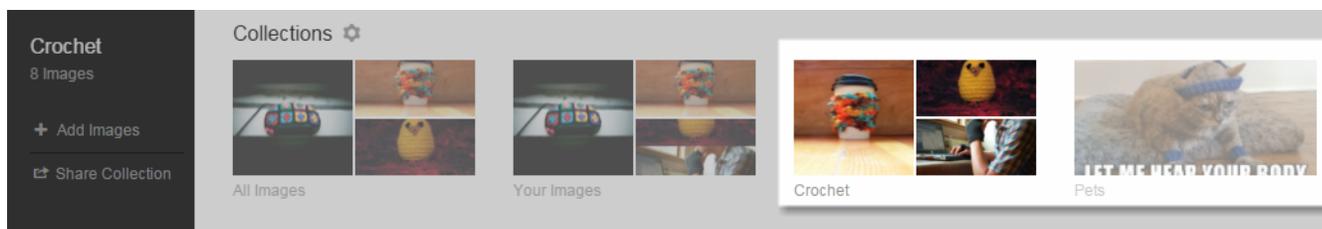
### Viewing images and collections

When you select the **Images** tab, you see the place images and collections.

- The **All Images** collection is displayed when you select the **Images** tab. You can see the **Your Images** collection, which includes any images that you added to the place in the library.



- Select an image from the center of the page and use the right and left arrows to start scrolling through the collection.
- The library at the top of the page shows the available collections. The **All** and **Your Images** collections are gathered by default.
- You can choose a different collection from the library to view the images in it.
- If you are a place owner, you can create and save a collection, and it is added to the collections library. For more information, see [Creating and editing image collections](#) on page 108 and [Saving collections](#) on page 112.
- The collections in the library are created and saved by the place owners, except for **All Images** and **Your Images** collections.



- Images appear in the **Images** tab when they are uploaded to a place. For more information, see [Adding images to places](#) on page 107.

## Restrictions

- Only uploaded images appear in collections. Images added through the insert image icon in the content editor; images attached to content; and images added to tiles, widgets, or banners will not appear in **Images** and cannot be used in collections.
- The **Images** tab can display no more than 200 images to avoid browser performance issues.

---

**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](#).

---

## Adding images to places

If you have create permissions in a place, you can add images to it. Once you add an image to a place, you and other place members can view it and use it in collections.

---

**Tip:** Collections are based on an image's tags, categories, and author, so it's a good idea to tag and categorize your images when you add them.

---

To add images to a place:

1. You can add images to a place in one of the following ways:
  - From the **Images** tab of the place: Select **Images** > **Add Images** .
  - From the Edit menu: Select  > **Files** .
  - From the Actions menu: Select **Actions** > **Files** .

This opens the **Upload Files** dialog box.

2. **Click to select files** to browse to the image or drag and drop the image file.

---

**Note:** You can upload multiple images at once. To bulk upload, select or drag and drop multiple files before moving onto the next step.

---

3. Add tags and categories to your image.

If you are uploading multiple images at once, any tags and categories you select are applied to all images you are currently adding.

---

**Note:** Tagging images and adding that tag to the collection's tag filters may help you to quickly gather images to a collection.

---

Your image or images are automatically displayed in any collections that are gathering the tags and categories you selected. They also appear in the **All Images** collection.

Now you can manage the uploaded images. For more information, see [Creating and editing image collections](#) on page 108, [Sharing collections](#) on page 111, and [Managing collections](#) on page 113.

- To add an image to a collection, add a matching tag or category to the image and the collection.
- To remove an image from a collection, remove the tag that is shared by the image and the collection.
- To delete your image from your community, select **Delete** from the **Actions** menu of the image.

## Creating and editing image collections

You can organize the place images into collections to share with other place members if you have view permissions for the place. You can also select an existing collection and change the filters and sorting.

You need to add images to a place and tag or categorize them before you can create a collection. Collections can be created by filtering by tags or categories. Collections use image tags, categories, and author.

---

**Tip:** Tagging and categorizing your images when you add them let you use them in collections. For more information, see [Adding images to places](#) on page 107.

---

---

**Note:** Only uploaded images appear in collections. Images added through the insert image icon in the content editor; images attached to content; and images added to tiles, widgets, or banners will not appear in **Images** and cannot be used in collections.

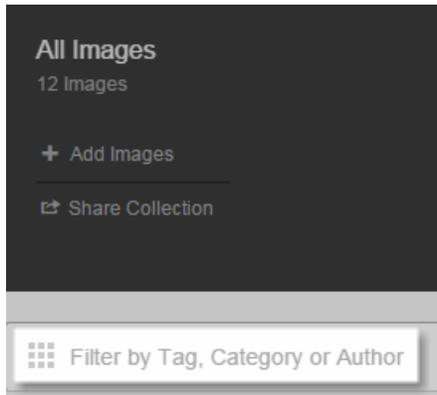
---

To edit an existing collection, select that collection from the **Collections** library at the top of the page first.

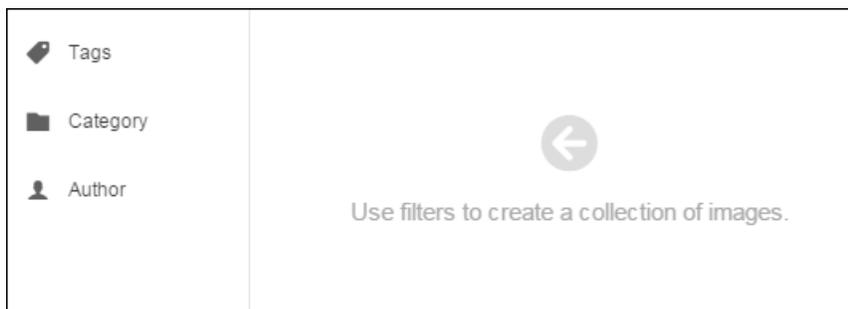
To create a new collection:

1. Add images to your place by using **Images > + Add images** .

2. Once you see a few images on the **Images** tab, then click in the **Filter by Tag, Category or Author** area.



3. From the menu, you need to filter all of the existing images before creating your collection. Select tags, category, and authors until you've added filters that produce the set of images you want.

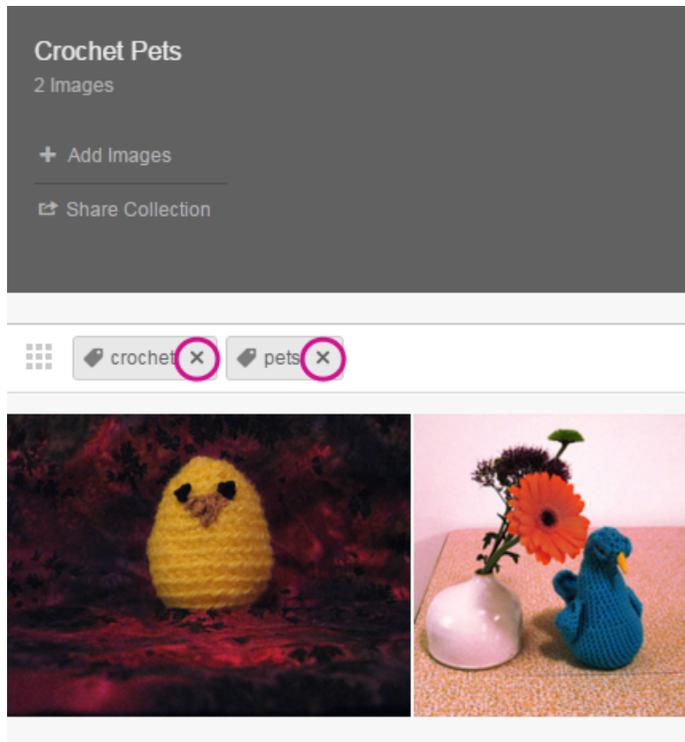


---

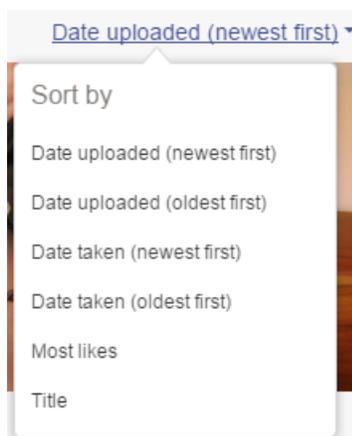
**Note:** Each collection can have only one category and one author. If you select a new category or author, it will replace the current one.

---

4. Remove any existing filters that you don't want to use.



5. If you want, select a different sort order from the **Sort by** drop-down menu.



By default, collections are sorted by **Date uploaded (newest first)**.

With the collection created, you can share your collection with other community members. For more information, see [Sharing collections](#) on page 111.

---

If you are a place owner, you can save your new collection, too. For more information, see [Saving collections](#) on page 112.

---

**Tip:** If you don't have permission to save a collection, share the collection in a message to yourself to view it later. For more information, see [Sharing collections](#) on page 111.

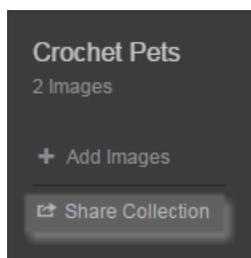
---

## Sharing collections

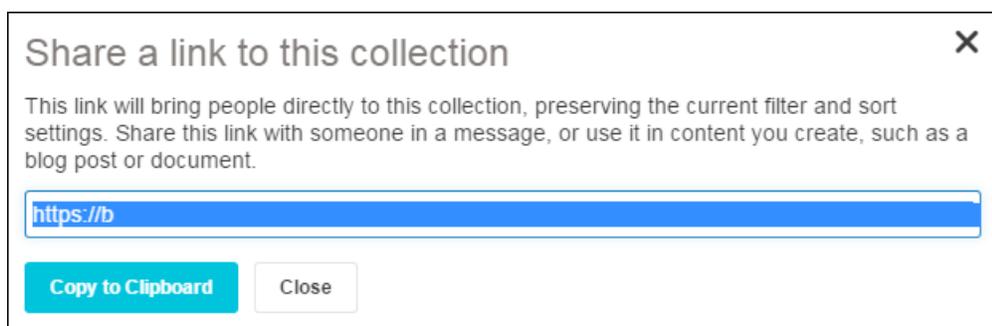
If you have view permissions for a place, you can share any of the saved collections displayed in the **Collections** library on the **Images** page as well as sharing new collections that you create.

To share a collection:

1. Select the collection that you want to share or create a new collection, as described in [Creating and editing image collections](#) on page 108.
2. Click **Share Collection**.



3. Click **Copy to Clipboard** to copy a link to your new collection.



4. Paste the link into any Jive content to share your new collection.

---

**Remember:** If you share your collection with community members who do not have view permissions to the place you shared your collection from, they are not able to view the collection.

---

## Saving collections

If you are a place owner, you can save collections for displaying on the place **Images** page in the **Collections** library.

Each place can feature 30 custom collections.

---

**Attention:** If you don't see **Save Collection** when creating a collection, then you aren't a place owner and can't save collections, or you have reached the maximum number of collections. You can still share your collection [Sharing collections](#) on page 111.

---

To save a collection:

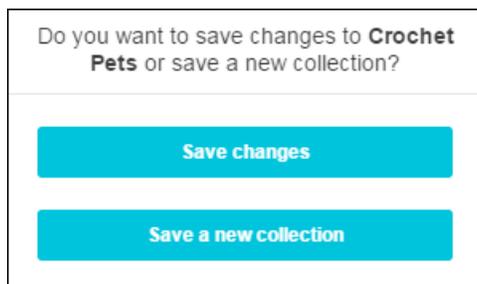
1. Create a new collection as described in [Creating and editing image collections](#) on page 108.
2. Click **Save Collection**.

---

**Note:** If you are unable to click **Save Collection**, then you have reached the maximum number of collections. If you want to save another collection, you need to delete one of the existing collections.

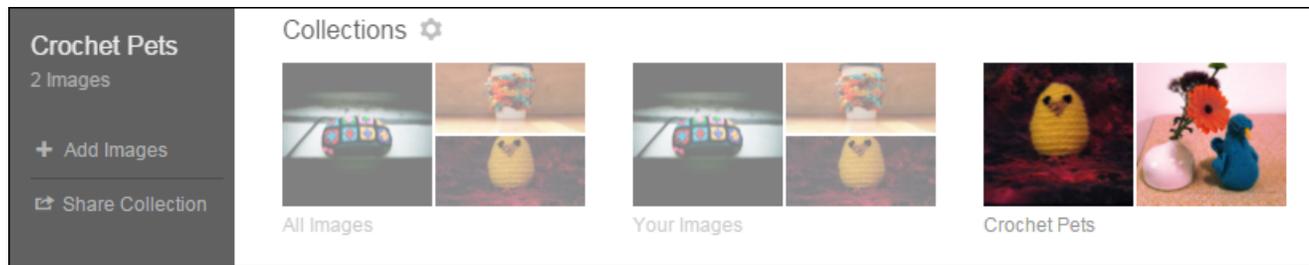
---

3. Select **Save changes** to update the collection with your new one or select **Save a new collection** to make a new collection.



4. If you are saving a new collection, enter a name for your new collection and click **Save Collection**.

Your new collection is displayed in the **Collections** library, after the other saved collections. You can change the order that collections are displayed, as described in [Managing collections](#) on page 113.

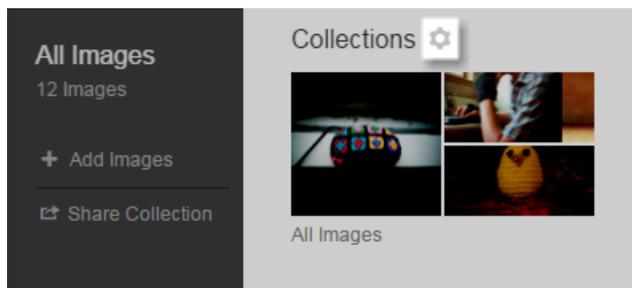


## Managing collections

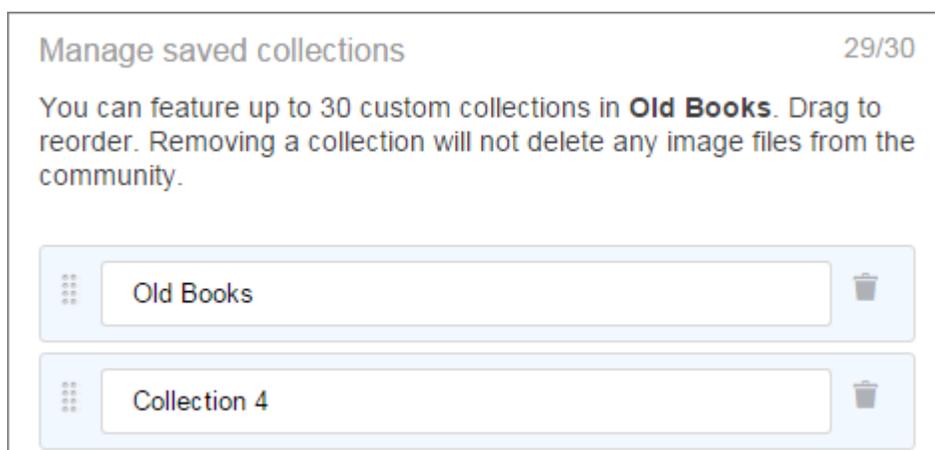
If you are the place owner, you can rename, reorder, and delete collections.

To manage your place collections:

1. Go to the **Images** tab of your place.
2. Select the gear icon next to collections.



You are directed to **Manage saved collections**.



3. Select the collection you want to change.

---

**Restriction:** You don't see the **All Images** and **Your Images** collections here since they cannot be renamed, reordered, or deleted.

---

4. To rename the collection, enter the new name.
5. To change the viewing order of the collections, drag and drop the collections until they are in the order you want.
6. To delete a collection, click  next to the collections.

---

**Note:** Deleting a collection does not delete the images in it.

---

7. Click **Save** when you are done making changes.

## Videos in Jive

Videos are one of the highly sought out ways to communicate and distribute information. Jive supports uploading your videos and embedding videos from other video services. And you can insert video within content or comments, or add them by using .

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*.

## Adding videos

You can insert a video in a comment, add it to content, or create one using  to publish a video in the community.

Generally, you follow these steps to add a video:

1. Click  > **Video** (to create a standalone video) or click  when you are adding a comment or a content icon (to insert an inline video).
2. Then you can:
  - a. Upload a new video: Click **Upload**, then add the video details and publish it.
  - b. Embed a video from another site: Click **Embed**, then enter the video URL and import the video.
  - c. Embed a video from the community: Click **Browse <community> Videos**, then find and select the one you want to add. This works for adding video to comments or other content items.

These steps are described in detail in the following articles.

## Uploading standalone videos to the community (with )

Use  to create new standalone videos  for your community. It can contain either an uploaded video or a link to a video from another site.

These videos are published as the Video content type  and are visible when you browse community content as separate content items.

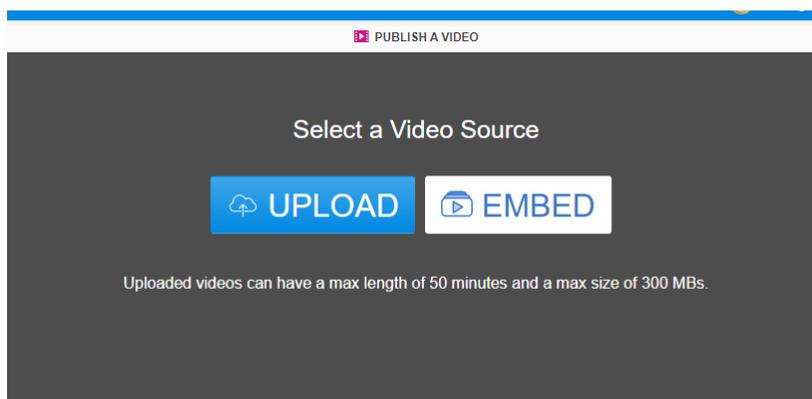
For more information about the requirements for video files, images for thumbnails, and caption / transcription files, see [Supported video providers and formats](#) on page 145.

To create a standalone video by using :

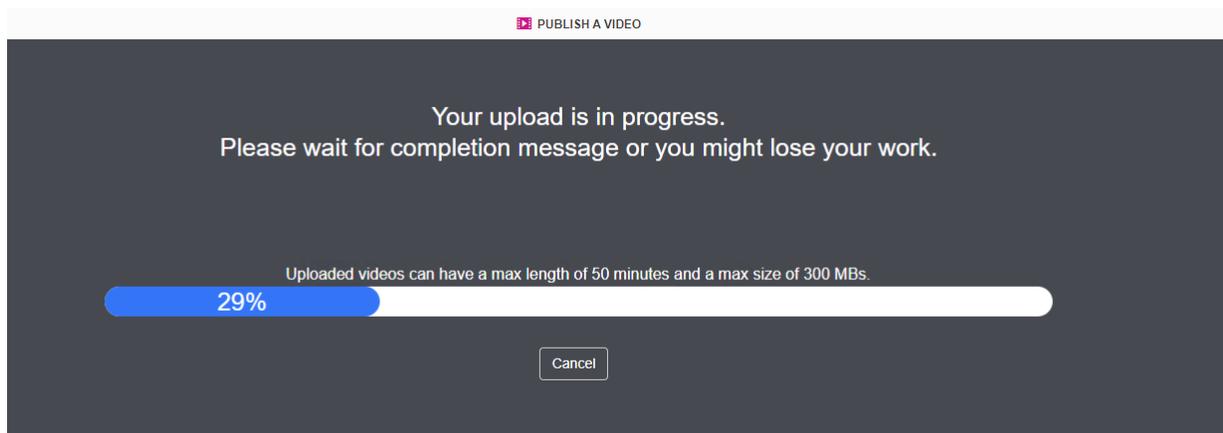
1. In your community, click  > **Video** .

The **Publish a Video** page opens.

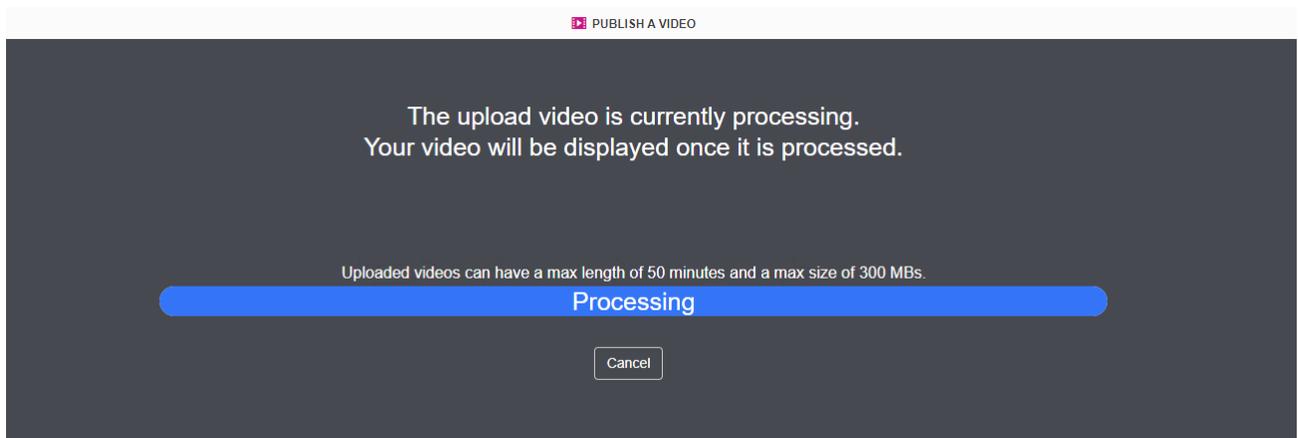
2. Under **Select a Video Source**, select **Upload**. Browse for the video on your machine, select the file, and then click **Open**.



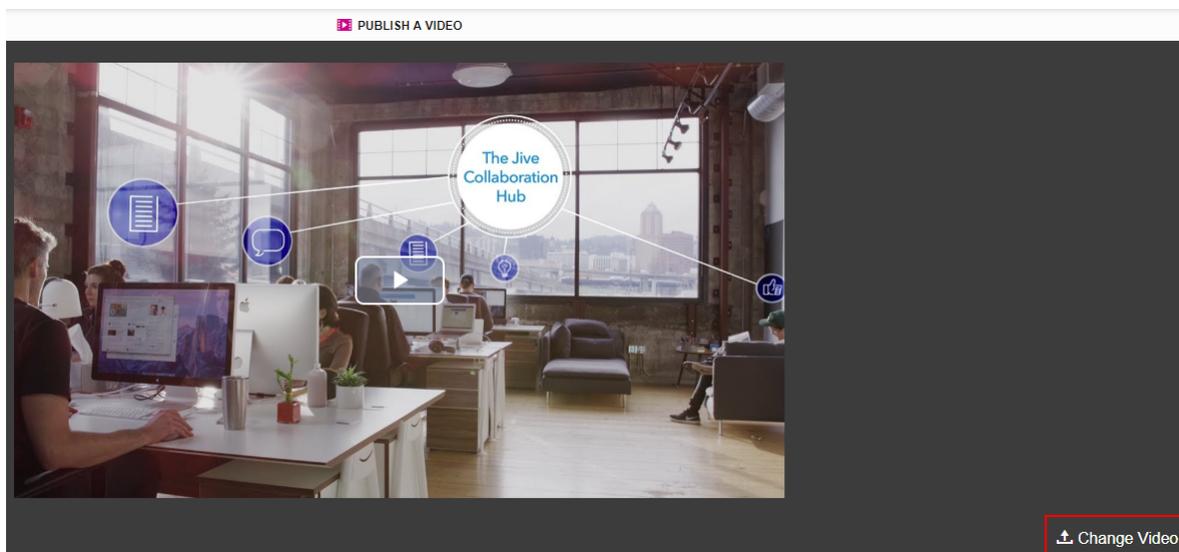
The video is uploaded to the community and then prepared for storage. You won't be able to publish the video until the process is completed.



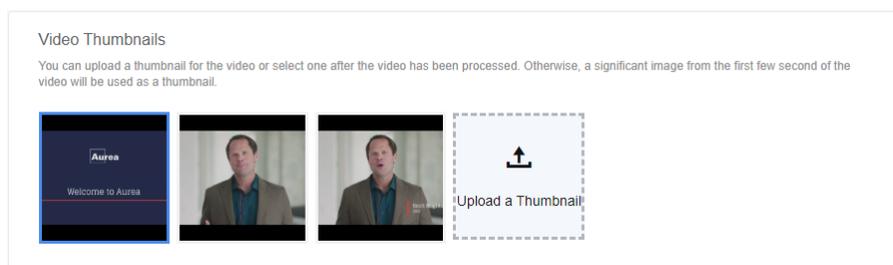
Once the video is uploaded, the next processing stage starts. At this time the video is encoded for storage and playback and three thumbnails are auto-generated.



3. If you want to change the video file, wait until the video becomes viewable and click **Change Video** on the right, and then repeat Step Step 2 on page 115.



4. Add a title and description for the video.
5. Under **Publish Location**, select where you want to publish the video.  
Note that you cannot publish a video only for yourself.
6. Under **Tag This Video**, specify the tags for this video.
7. Under **Categories**, select the categories.  
The category selection depends on the publishing location.
8. Under **Video Thumbnails**, click on one of the available images to be used as the video cover.

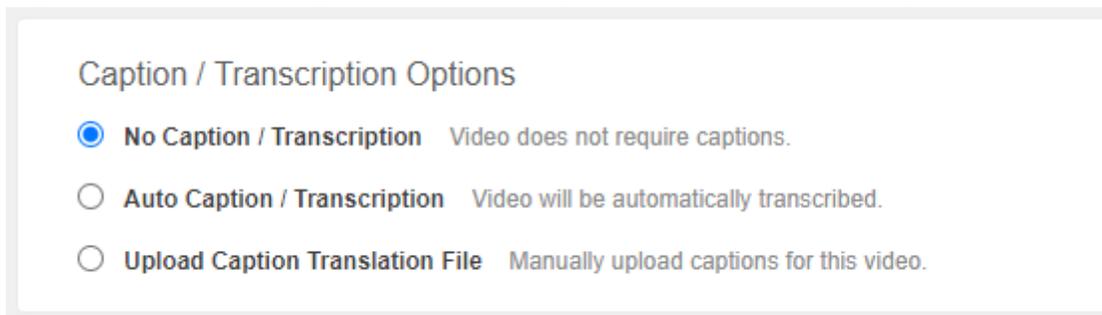


You can select one of the auto-generated thumbnails or upload your own (click **Upload a Thumbnail** and upload the desired cover image). You can upload multiple images, but only the image you select will be used as the thumbnail – it is framed with a blue outline. In the example above, the first image is selected. Other uploaded images are discarded when you save the video.

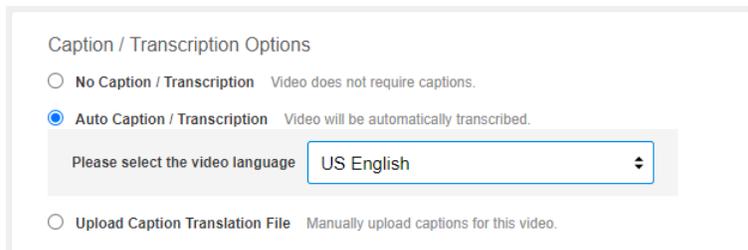
By default, the video thumbnail should be at least 640 pixels wide with the file size less than 2 MB in one of the supported formats: JPG (.jpeg, .jpg), static GIF (.gif), BMP (.bmp), PNG (.png). Animated GIFs are not supported. For the best fit, it should be rectangular with a 4:3 ratio. Images with other proportions are automatically adjusted to fit.

9. Under **Caption / Transcription Options**, choose one of the options for caption / transcription:

- If you don't need captions / transcriptions, choose **No Caption / Transcription**.



- If you want to have captions / transcriptions auto-generated and select the original video language from the list, choose **Auto Caption / Transcription**.



**Note:** If auto-generating captions / transcriptions is disabled, you won't see this option but you can upload prepared captions / transcriptions anyway.

- If you want to use prepared caption / transcription files in one or several languages, choose **Upload Caption Translation File**. Then upload the caption / transcription files marking each with the language it has been designed for.

Caption / Transcription Options

No Caption / Transcription Video does not require captions.

Auto Caption / Transcription Video will be automatically transcribed.

Upload Caption Translation File Manually upload captions for this video.

Captions format files supported: .vtt,.dxfp,.scc,.srt,.ttml,.sami

caption\_1.vtt X French

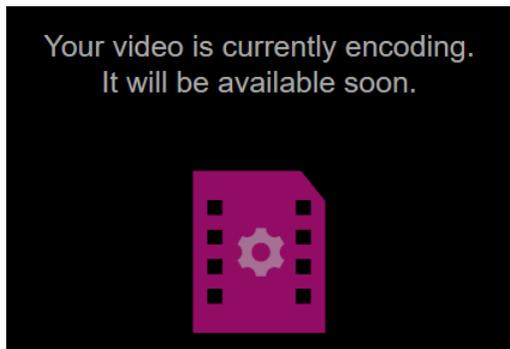
Choose a file X Select Caption Language

[Add Another Caption / Transcription](#)

### 10 Click **Publish**.

Note that this button is unavailable until the video is fully uploaded.

When you click publish, you start the next – *complex* – stage of the video processing. During this stage, the speech in the video is converted to text and translated to the required languages. Processing may take some time; the video duration, the number of captions to be generated, and the general service availability may affect the overall time.



Which files are auto-generated depends on your community configuration. If translations are enabled for your community:

- If you selected **Auto Caption / Transcription**, Jive generates all caption / transcription files for the languages configured for translations.

Later you can download the autogenerated caption / transcription file, edit it in a text editor, and upload it back.

- If you selected **Upload Caption / Translation File** and uploaded one or more custom caption / transcription files, Jive generates files for all languages configured for translations.

If translations are disabled for your community:

- If you selected **Auto Caption / Transcription**, Jive generates only caption / transcription file for the source language of the uploaded video.
- If you selected **Upload Caption / Translation File** and uploads one or more custom caption / transcription files, Jive keeps the uploaded files only and does not generate any additional translations.

After the processing is finished successfully, the video appears in News and activity feeds. The video also appears in searches, and you can search not only the title and description but also captions / transcriptions if they are available for the video.

For detailed information about uploaded standalone video processing, see [About Jive Video provider](#) on page 142.

## Embedding standalone videos to the community (with )

Use the create menu  to embed videos from other sites as new standalone videos  for your community.

These videos are published as the Video content type  and are visible when you browse community content as separate content items.

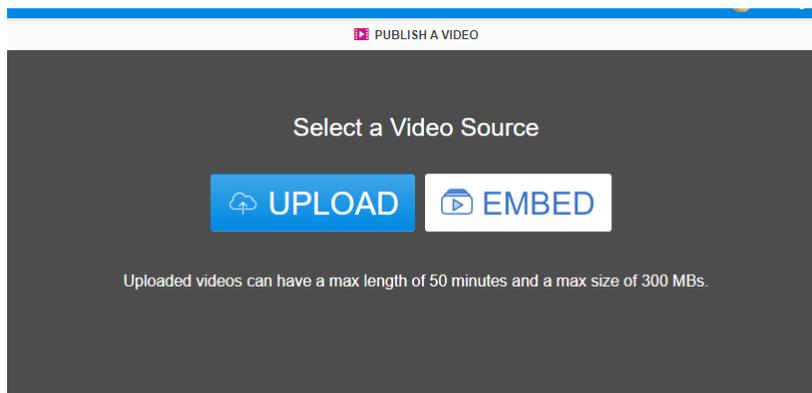
For more information about the requirements for video files, images for thumbnails, and caption files, see [Supported video providers and formats](#) on page 145.

To embed a standalone video from another site by using :

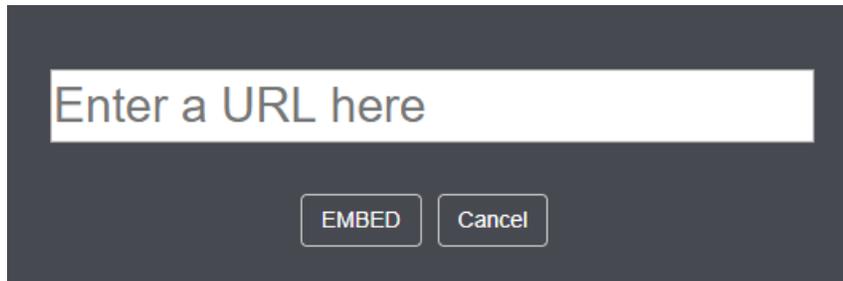
1. In your community, click  > **Video** .

The **Publish a Video** page opens.

2. Under **Select a Video Source**, click **Embed**.

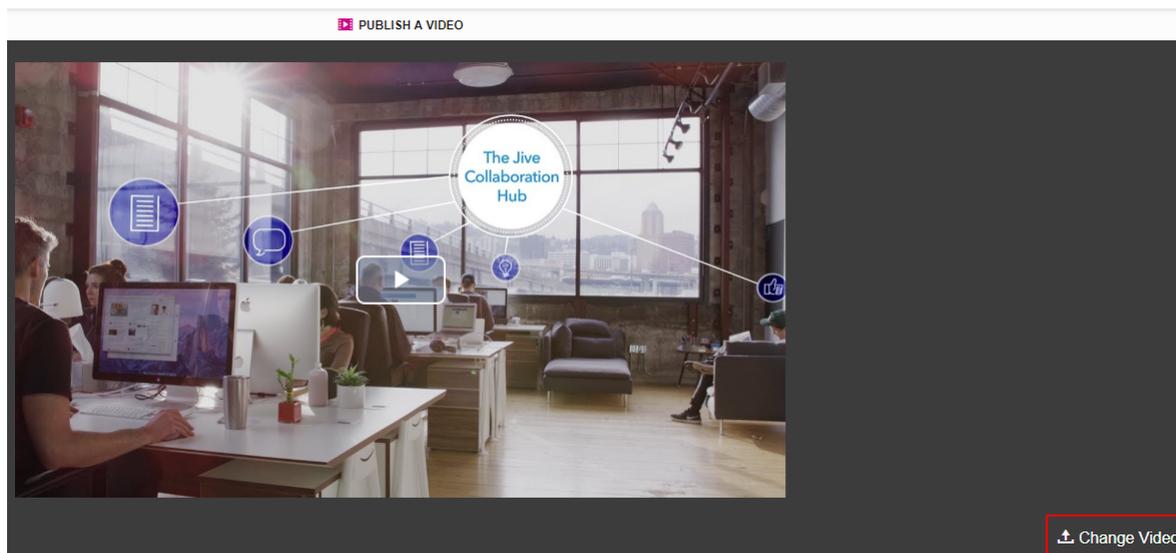


3. Enter the URL of the video you want to add and click **Embed**.



The video is displayed and you can check it before publishing.

4. If the URL is incorrect or you want to embed another video, click **Change video** on the right and repeat Steps Step 2 on page 119 and Step 3 on page 119.



5. Add a title and description for the video.
6. Under **Publish Location**, select where you want to publish the video.  
Note that you cannot publish a video only for yourself.
7. Under **Tag This Video**, specify the tags for this video.
8. Under **Categories**, select the categories.  
The category selection depends on the publishing location.
9. Click **Publish**.

The video becomes available immediately after you publish it.

### Inserting inline videos into content items and comments

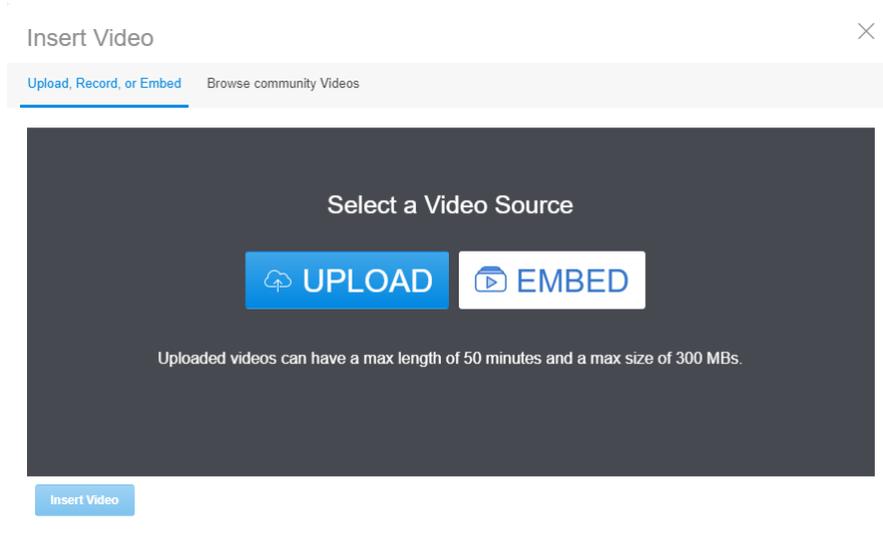
You can add a new or existing video to a content item or a comment or reply in your community.

Unlike standalone videos, uploading inline videos does not support caption / translation functionality. This means that you won't be able to auto-generate or add a custom caption / translation file to an uploaded inline video. Instead, you can publish

To add a video in comments or content:

1. In the toolbar of the content editor, click .

The **Insert Video** box opens.



2. To upload a video:

- a) Select the **Upload, Record or Embed** tab at the top of the box.
- b) Click **Upload**, browse for the video on your machine, select the file, and then click **Open**.

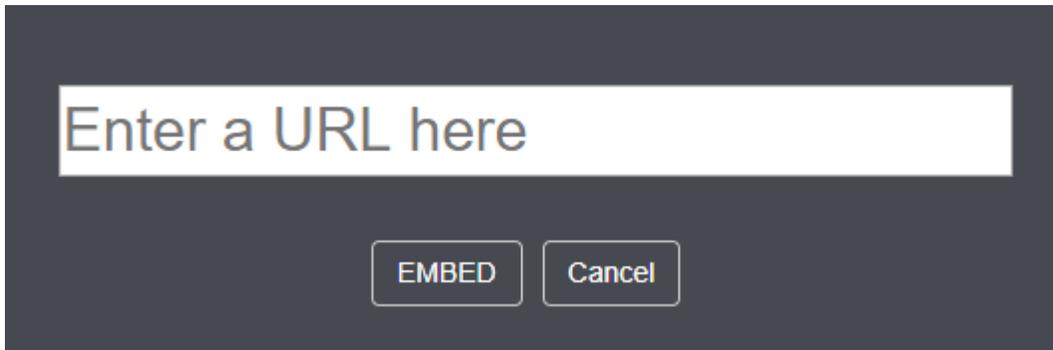
This starts the video uploading.

- c) If you want to change the video (if, for example, you uploaded a wrong file), wait until the uploading finishes, click **Change video** on the right and repeat Step Step 2.b on page 121.
- d) After the upload completes, click **Insert Video** to add a video.

The dialog box is closed and the video is added to your comment.

3. To embed a video from another site:

- a) Click **Upload or Embed** at the top of the box, then click **Embed**.
- b) Paste the URL of the video and click **Import Video**.



c) After video import completes, click **Insert video**.

The dialog box is closed and the video is added to your comment.

4. To embed a video from the community:

a) Click **Browse <community> Videos** at the top of the box.

b) Find the video you want to add.

By default, the list contains all available videos, both standalone and embedded into other content or comments. You can list through the pages by using arrows at the bottom of the box.

## Insert Video

Upload or Embed

[Browse vi Videos](#)

Type to filter by text

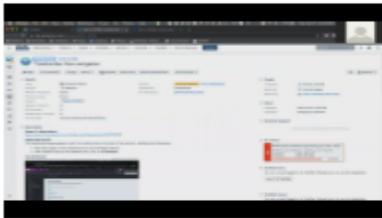
Length

Creation ▲

Created by:

Anyone ▾

### ACTA



15 days ago

Administrator

### Demo

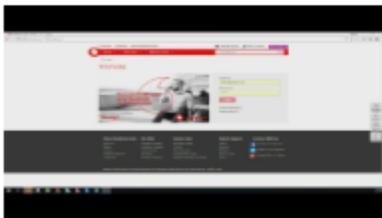


16 days ago

Administrator

Summ

### TEST



16 days ago

Administrator



[Insert Video](#)

You may find the following filtering and sorting options useful to find the necessary one:

<b>Type to filter by text</b>	Filters the results by the text you type. The search is done through all available video metadata. This filter also removes all embedded videos from the list.
<b>Length</b>	Sorts the videos by their duration.
<b>Creation</b>	Sorts the videos by the time when they were created.
<b>Created by</b>	Filters the list by author: you ( <b>Just me</b> ) or anyone in the community ( <b>Anyone</b> ).
<b>Created in</b>	Filters the list by where it is published: in the space you are in (by place name) or anywhere in the community ( <b>Anywhere</b> ).

c) Once you have found the video, click on it, and then click **Insert Video** at the bottom of the box.

The dialog box is closed and the video is added to your comment.

5. Once you see your video in the comment, you can click **Add comment**, **Publish**, **Create Document**, or **Post**.

## Viewing videos

Here you can find an overview of the options available when viewing videos.

The options listed here apply to uploaded videos: standalone, inline, and standalone embedded as inline. Depending on the community configuration, the video settings, and how they were uploaded, some of the options may be unavailable.

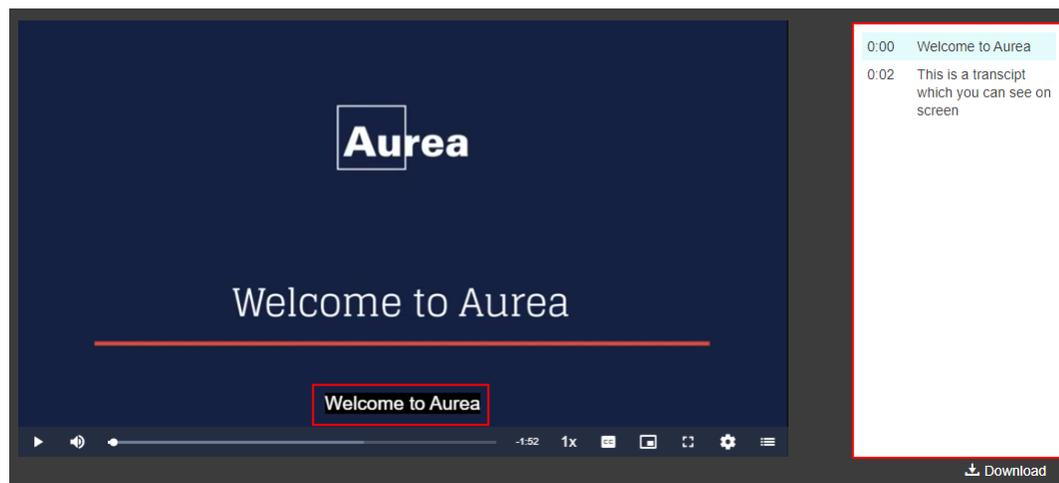
Videos embedded from third-party providers, such as YouTube or Vimeo, use the functionality of the video source, and the experience with such videos differs.

## Viewing videos with captions and transcriptions

If a video has captions / transcriptions, you can view it with captions or transcriptions (or both) turned on.

Captions appear on the video itself, while transcripts appear next to the video. You can select if you want to view a video with captions or transcriptions (or both) and the languages and the languages they should be displayed in.

**Figure 12: A video with captions and transcription turned on**



To turn captions on:

- While viewing a video, click  and select a language from the available list.

To turn captions off:

- While viewing a video, click  and select **Captions off**.

To toggle transcriptions:

- While viewing a video, click .

To change the transcription language:

- While viewing a video, click  and select a language from the list.

How captions look in the video player can be additionally configured.

## Changing the video quality

By default, videos are played with the best quality fitting for the device you are using and the capacity of your internet connection.

To change the video quality:

- While viewing a video, click  and select the desired quality.



- Select **auto** to return to the default setting.

### Changing playback speed

You can choose to watch videos at faster or slower speeds.

To adjust playback speed:

- While watching a video, click **1x** and select the desired speed.



### Viewing at fullscreen

Viewing a video on fullscreen is more comfortable at times.

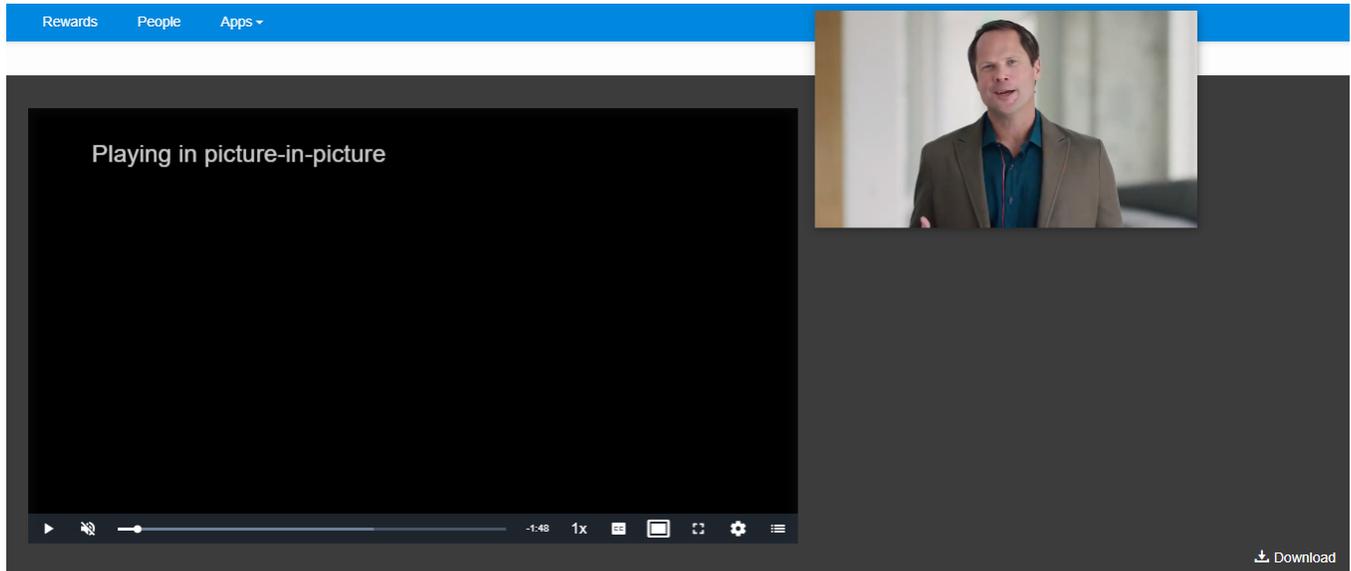
- While viewing a video, click  to switch to the fullscreen mode.
- To switch back, click  or press `Esc`.

## Viewing in the picture-in-picture mode

With picture-in-picture enabled, you can continue viewing a video while switching to another document or application.

The video is played in a special mini box. It stays on top of all other documents and applications and you can drag it to any place on your screen.

**Figure 13: Picture-in-picture mode on**



To switch to the picture-in-picture mode:

- Open a video and click  and drag the miniaturized video to a place on your screen where you'll comfortable watching it.

To turn the picture-in-picture mode off:

- Click  on the miniaturized video OR
- Click  on the video tab.

## Configuring captions in the video player

Captions are displayed over a video and at times you may want to configure them to be comfortable to read.

To configure captions:

1. While viewing a video, click  and select **caption settings**.

**Figure 14: Caption settings**



2. Specify color and opacity for the caption text, text background, and window.  
In the example above, the text color is set to yellow, the background color to red, and the window color to cyan.
3. Specify the size, edge style, and type for the font.  
In the example above, the text size has been increased, the edge style set to raised, and the font type changed to monospace.
4. Click **Done** to save the changes and continue watching the video.

---

**Note:** These settings apply only to the video you are currently viewing.

---

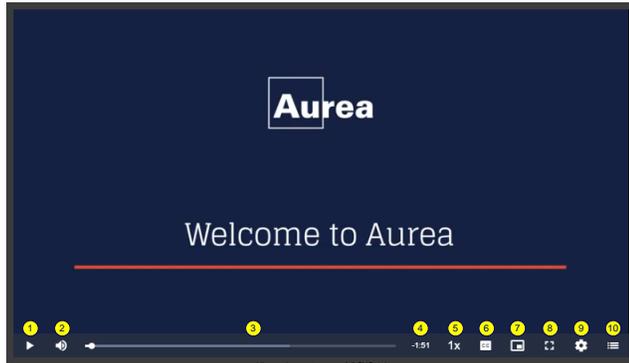
To restore the default settings:

1. While viewing a video, click  and select **caption settings**.
2. Click **Reset** to restore the settings.
3. Click **Done** to save the changes and continue watching the video.

## Jive video player interface

Here you can find the details of the video player.

**Figure 15: Video player overview**



- (1) **Play/Pause** Toggles video playback.
- (2) **Volume/Mute** Adjusts the volume for the player. You can also mute it completely.

**Figure 16: Adjusting volume**



- (3) **Video track** Shows which part of the video you are viewing.
- (4) **Video duration** Shows the time before the video end. In this example, the video would end in 1 minute 51 seconds.
- (5) **Playback rate** Toggles video playing speed. You can speed videos up or slow them down as required. The normal speed is 1x.

**Figure 17: Adjusting the playback rate**



- (6) **Captions** Toggles captions and allows configuring how captions are displayed.

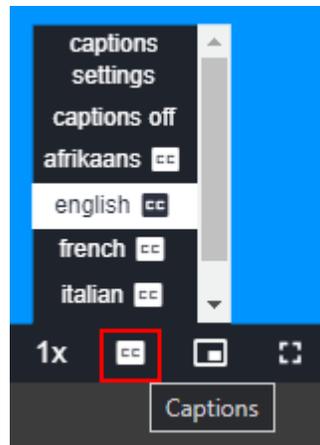
With captions enabled, the video would look like this:

**Figure 18: Captions example**



You can turn on captions in one of the available languages (if any), turn captions off completely (**captions off**). You can also configure how captions are displayed in the interface by clicking **caption settings** and adjusting the settings.

**Figure 19: Selecting captions**



With the caption settings, you can make them easily readable for you. In the example below, the font is changed and its size is increased, the text and background are colored to make the text stand out. And you want to restore the default, click **Reset**.

**Figure 20: Caption settings**

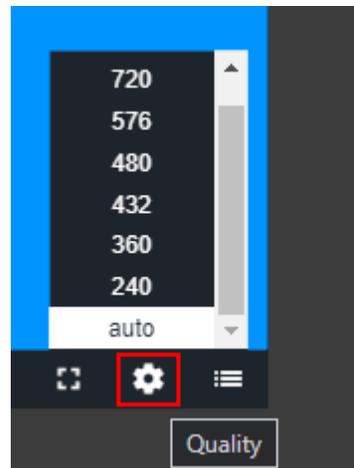


(7) **Picture-in-picture** Toggles picture-in-picture mode when you can switch to another document or application while still viewing the miniaturized video.

(8) **Fullscreen / Inline** Toggles the fullscreen mode. Click the button again or press `Esc` or `F11` back to the normal-sized video.

(9) **Quality** Toggles the quality of the video.

**Figure 21: Adjusting video quality**

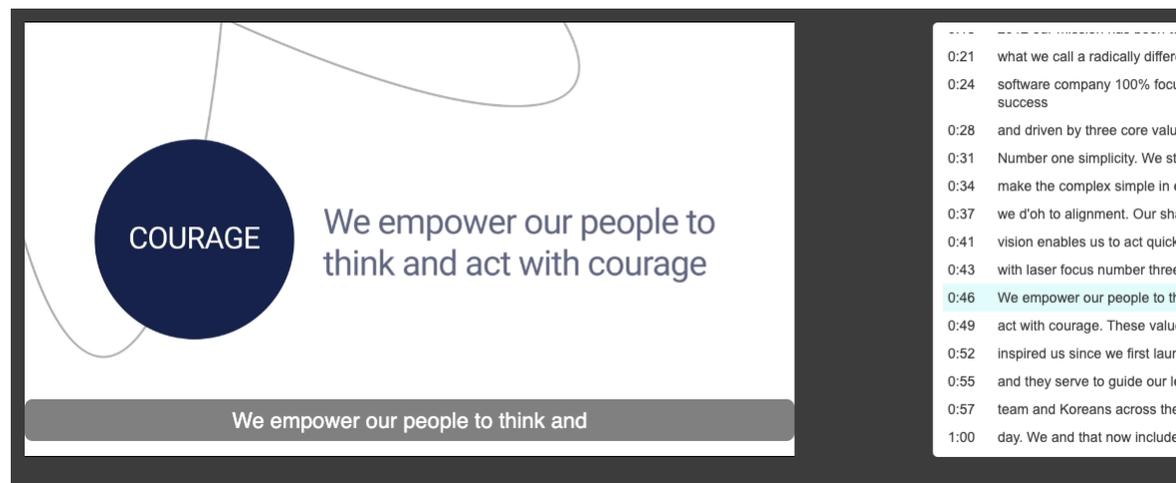


With the **auto** setting enabled, the playback is adjusted to the best quality based on your screen resolution and the internet connection speed. You can select a setting manually if you want to.

**(10)  
Transcription**

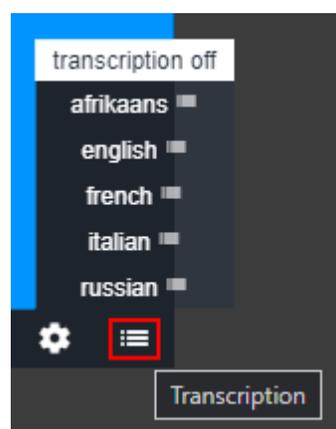
Toggles transcriptions.

**Figure 22: A video with transcription**



You can select which language you want to use or turn them off completely.

**Figure 23: Selecting a transcription**



## Editing standalone videos

If you created a video and then found that you need to change it – add a better thumbnail, for example – you can edit the video.

Standalone uploaded videos can be edited similarly to other content types. You can change the video, title and description. Additionally, for uploaded videos, you can choose another thumbnail and add or replace caption / transcription files.

Editing uploaded videos has some notable distinctions. The video may be processed anew even if you do not upload a new video file; this is required to correctly update all content files and metadata of the video. Until the processing is completed (which may take some time), the video will be available only by its direct URL. Besides that, even though the version counter is updated when you save the changes, Jive does not keep previous versions of the video content, including the video itself and its related files. That is, you will not be able to restore any of the previous versions for a video. For more information on video processing when editing uploaded videos, see [About Jive Video provider](#) on page 142.

---

To edit a video:

1. Open the video  you want to edit.
2. Click **Edit**.
3. Make the desired changes.
4. Click **Update**.

The video becomes available once the processing is finished.

## Downloading videos

You can download standalone uploaded videos and their captions / transcriptions as long as you have permission to access the videos.

You can store community videos on your mobile device or computer – for example, for use when you are not connected to the internet. You can only download standalone uploaded videos – that is, videos uploaded from  > **Video** > **Upload a Video** . Videos are downloaded in the MP4 (.mp4) format.

You can also download caption / transcription files that are available for the videos. A video can have a file in every language supported for captions / transcriptions in your community. Captions / transcriptions are downloaded in the WebVTT (.vtt) format.

Note that video downloads may be forbidden in your community. In this case, you won't see the downloading link when viewing videos.

---

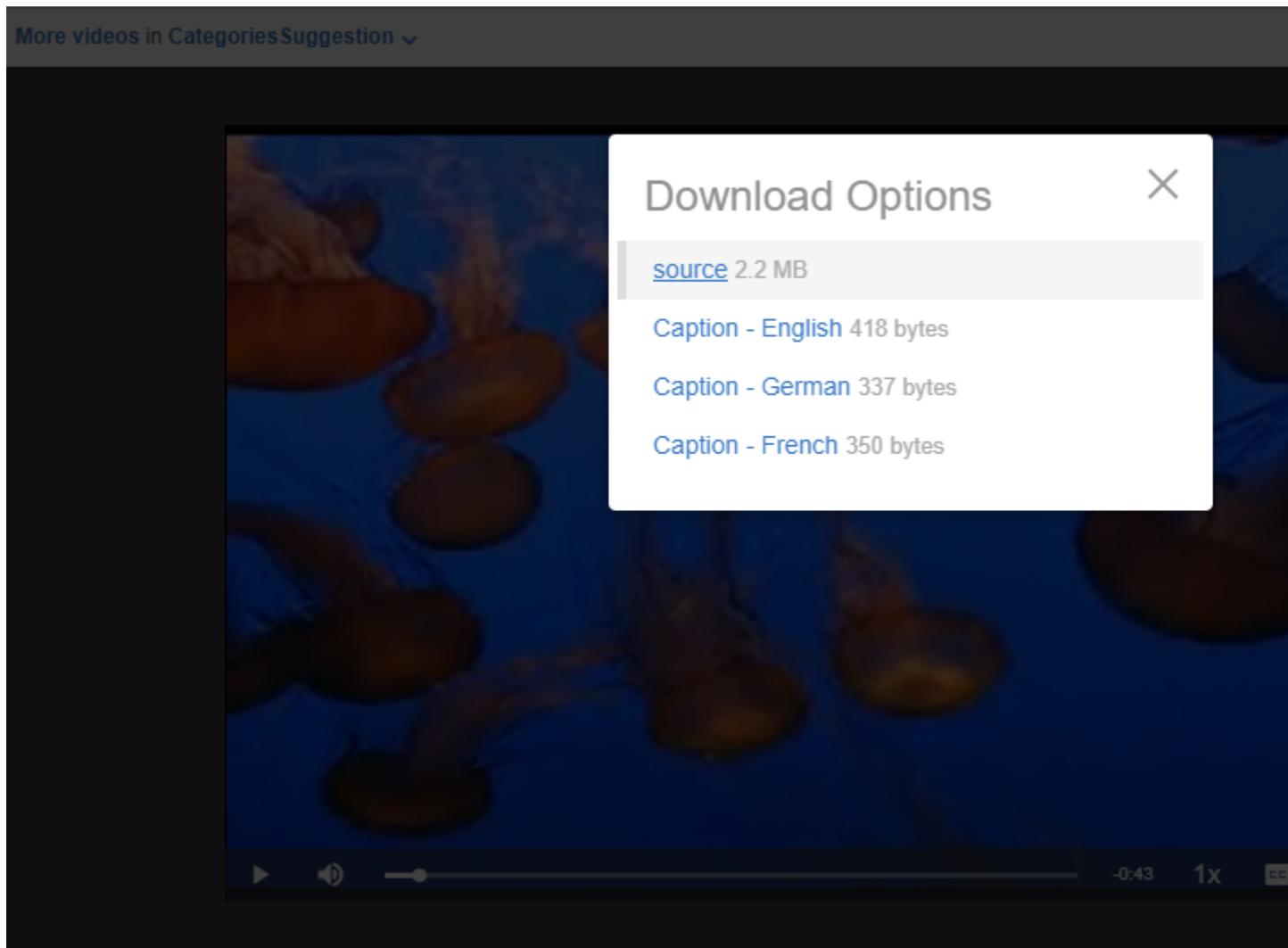
**Important:** Jive is migrating from the Perceptive Media provider to the Jive video provider. Options and configuration relevant only for the Perceptive Media provider are marked with <sup>(Perceptive)</sup>. They will be removed once the migration is finished.

---

To download standalone uploaded videos:

1. Go to the video you want to download.

**Figure 24: Downloading Options**



2. To download the video, click **Download > source** to the right of the video, and then select where to save the file.
3. To download captions / transcriptions, click **Download > Caption - <language>** for every language you need, and then select where to save the file.
4. To download the video<sup>(Perceptive)</sup>, click **Actions > Download video**, and then select where to save the file.

The selected files are downloaded to your computer.

## Captions / transcriptions in standalone uploaded videos

A video can have a caption / transcription in every language supported for captions / transcriptions in your community, maximum one file for each language. Here you

can find details on adding captions / transcriptions to videos and using them when watching videos.

Jive Video provider support captions / transcriptions that convey what is being said in the video. In the video player, captions are displayed over the video while transcriptions – next to it. Some of the options described here may not be available in your community due to custom community configurations.

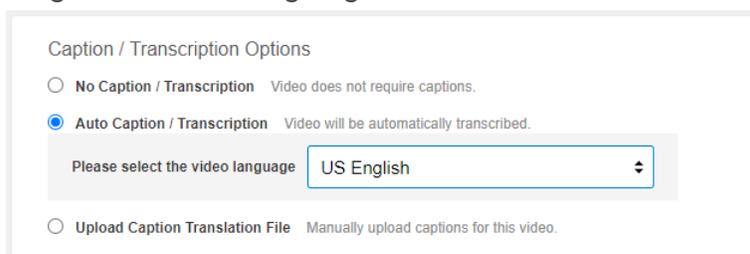
Note that embedding videos from third-party providers, such as YouTube or Vimeo, employs another process and the experience with such videos differs.

## Adding and changing captions / transcriptions

You can add captions / transcriptions to standalone videos when uploading a new video or later when editing it. You can also choose to generate captions / transcriptions by using speech recognition technology.

To add or replace captions / transcriptions to an uploaded video:

1. If you are uploading a new video: Upload a new standalone video by using  > **Video** .
2. If you are editing an existing standalone video: Open the video and click **Edit**.
3. Choose one of the options for adding or changing captions:
  - If you want to have captions / transcriptions auto-generated and select the original video language from the list, choose **Auto Caption / Transcription**.



Caption / Transcription Options

No Caption / Transcription Video does not require captions.

Auto Caption / Transcription Video will be automatically transcribed.

Please select the video language

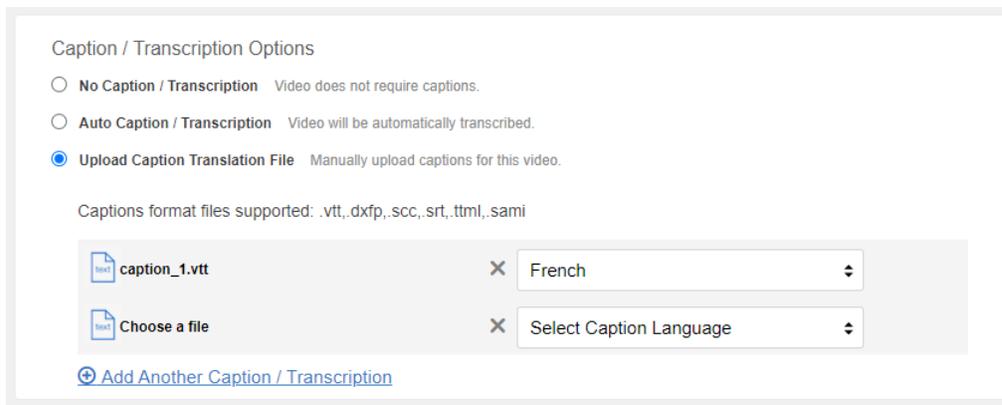
Upload Caption Translation File Manually upload captions for this video.

---

**Note:** If auto-generating captions / transcriptions is disabled, you won't see this option but you can upload prepared captions / transcriptions anyway.

---

- If you want to use prepared caption / transcription files in one or several languages, choose **Upload Caption Translation File**. Then upload the caption / transcription files marking each with the language it has been designed for.



4. Click **Publish** / **Save** to save the video.

After you save the changes, the video undergoes the complex processing, and captions / transcriptions are updated or generated per your choice.

Which files are auto-generated depends on your community configuration. If translations are enabled for your community:

- If you selected **Auto Caption / Transcription**, Jive generates all caption / transcription files for the languages configured for translations.

Later you can download the autogenerated caption / transcription file, edit it in a text editor, and upload it back.

- If you selected **Upload Caption / Translation File** and uploaded one or more custom caption / transcription files, Jive generates files for all languages configured for translations.

If translations are disabled for your community:

- If you selected **Auto Caption / Transcription**, Jive generates only caption / transcription file for the source language of the uploaded video.
- If you selected **Upload Caption / Translation File** and uploads one or more custom caption / transcription files, Jive keeps the uploaded files only and does not generate any additional translations.

For more information on how videos are processed, see [About Jive Video provider](#) on page 142.

## Viewing videos with captions and transcriptions

If a video has captions / transcriptions, you can view it with captions or transcriptions (or both) turned on.

Captions appear on the video itself, while transcripts appear next to the video. You can select if you want to view a video with captions or transcriptions (or both) and the languages and the languages they should be displayed in.

**Figure 25: A video with captions and transcription turned on**



To turn captions on:

- While viewing a video, click  and select a language from the available list.

To turn captions off:

- While viewing a video, click  and select **Captions off**.

To toggle transcriptions:

- While viewing a video, click .

To change the transcription language:

- While viewing a video, click  and select a language from the list.

How captions look in the video player can be additionally configured.

## Configuring captions in the video player

Captions are displayed over a video and at times you may want to configure them to be comfortable to read.

To configure captions:

1. While viewing a video, click  and select **caption settings**.

**Figure 26: Caption settings**



2. Specify color and opacity for the caption text, text background, and window.  
In the example above, the text color is set to yellow, the background color to red, and the window color to cyan.
3. Specify the size, edge style, and type for the font.  
In the example above, the text size has been increased, the edge style set to raised, and the font type changed to monospace.
4. Click **Done** to save the changes and continue watching the video.

---

**Note:** These settings apply only to the video you are currently viewing.

---

To restore the default settings:

1. While viewing a video, click  and select **caption settings**.
2. Click **Reset** to restore the settings.
3. Click **Done** to save the changes and continue watching the video.

## Downloading captions / transcriptions

You can download captions / transcriptions of a standalone uploaded video as long as you have permission to access the video.

You can download any or all available caption / transcription files. If you need to make changes to auto-generated captions, you can download the caption file and edit it before uploading it back to your video.

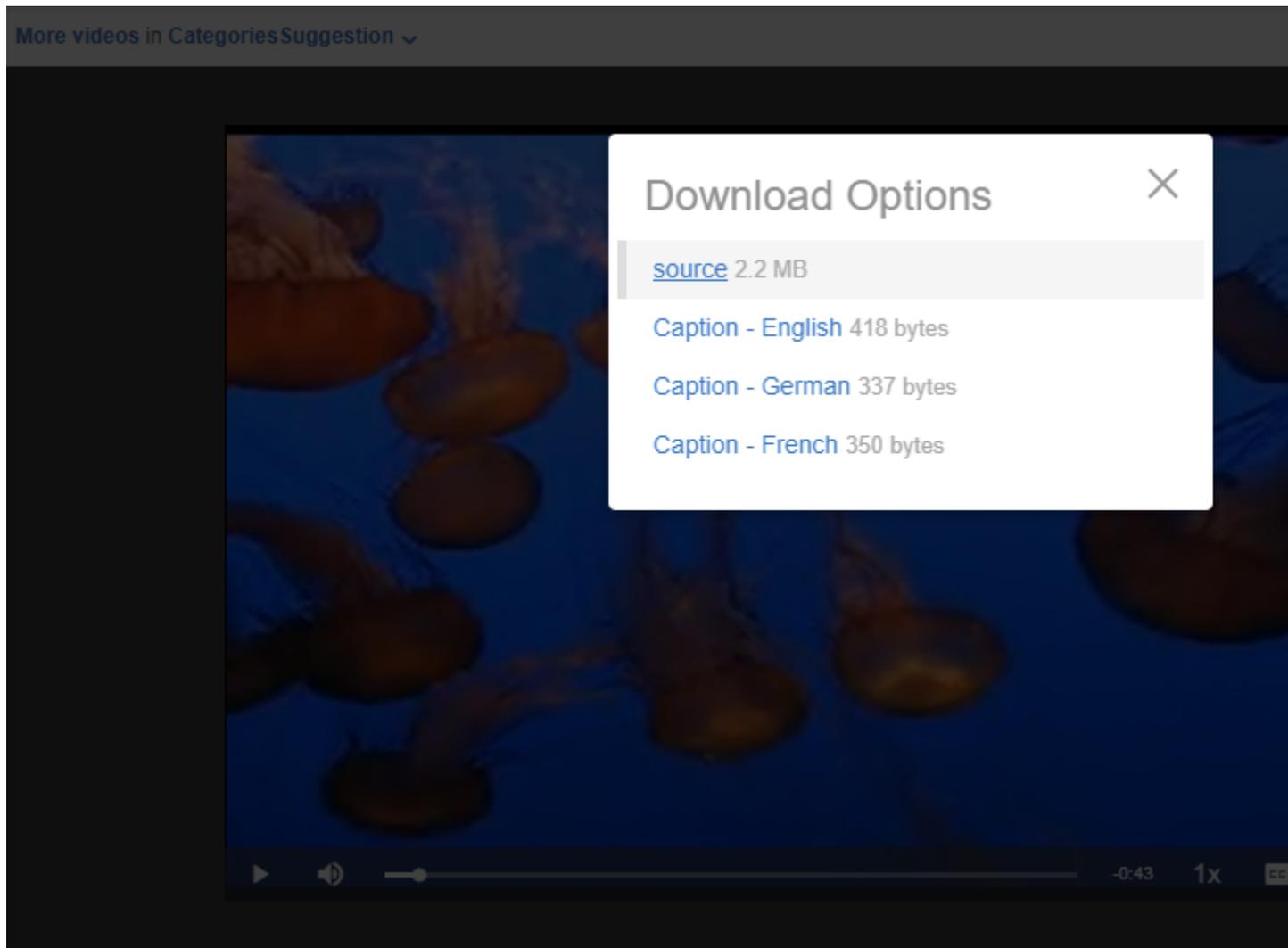
Caption / transcription files are downloaded in the WebVTT (.vtt) format.

Note that video downloads may be forbidden in your community. In this case, you won't see the downloading link when viewing videos.

To download the caption / transcription files of a video:

1. Open the video.
2. For every language you need, select **Download > Caption - <language>** to the right and specify where to save the file.

**Figure 27: Downloading Options**



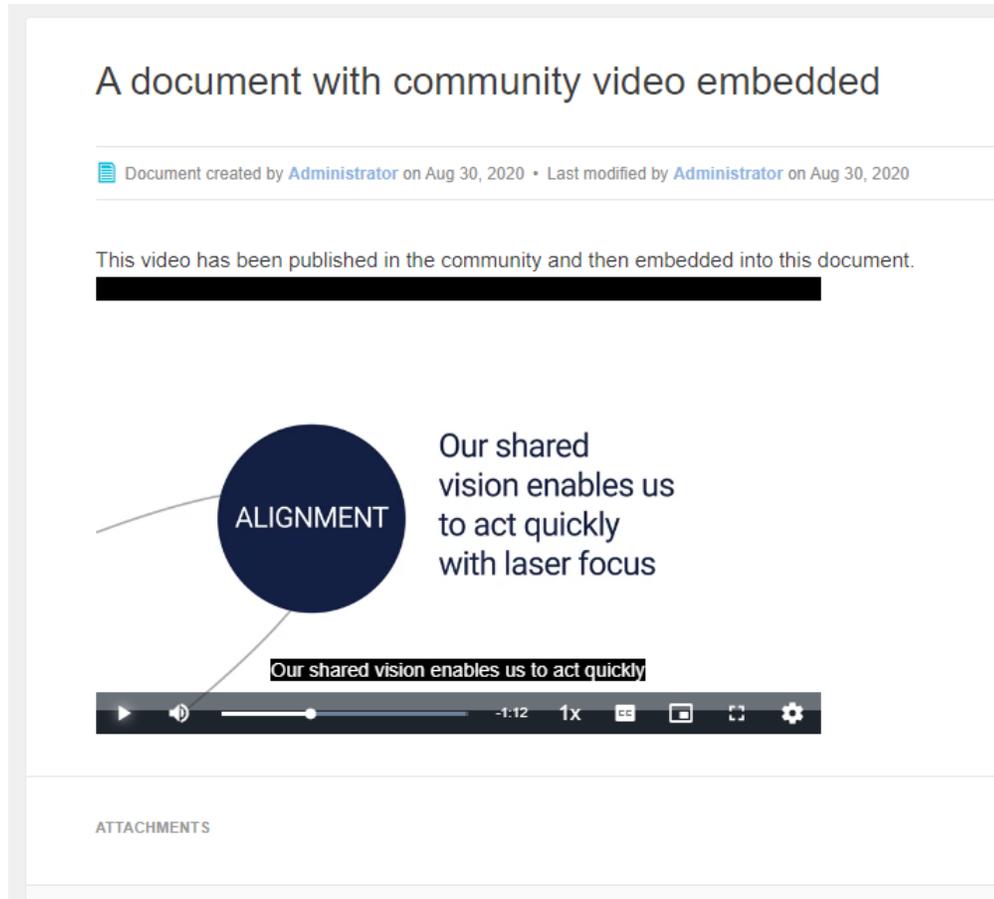
The selected files are downloaded to your computer.

### **Captions in inline videos**

*If you need to have captions in an inline video, you can upload it as a standalone video, and then insert it into your blog post or document.*

Adding captions / transcriptions to uploaded inline videos in content items and comments is not supported. At the same time, an uploaded standalone video amounts to a separate item that can be embedded into other content items similar to how you can embed a YouTube video. When embedded, such videos can be played with captions enabled.

**Figure 28: A community-published video that is embedded in a document**



For more information about embedding community-published videos, see [Inserting inline videos into content items and comments](#) on page 120.

## Featuring videos in places

If you featured a video in your place, the users see the featured video in the Featured Content and Featured Video tiles and widgets on the place pages.

You need to be the place owner or administrator to feature the videos.

To feature a video:

1. Go to the place.
2. Click **Videos**.
3. Select either the video you want to feature or **Video** under  and upload a new video.

4. Under **Actions**, click **Add to featured content**.
5. If you no longer want a video to be featured, you can select **Remove from featured 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](#).

---

## Removing videos from Top and Trending

If you do not want your video feature in the trending lists of your community, you can remove this video from the global lists.

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. For more information, see [Removing content items from Top and Trending](#) on page 76.

### To remove a video from Top and Trending lists

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

### To add a video to Top and Trending lists

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

## Deleting videos

If required, you can delete uploaded videos.

When you delete a video, all video content, including the video file itself and the related metadata, is deleted. You will not be able to restore a deleted video.

To delete a standalone video:

1. Open the video  you want to delete.
2. Click **Actions > Delete** , then confirm your decision.

The video is deleted.

To delete an embedded video:

1. Open the content item or comment in which the video is embedded.
2. Click **Edit**.
3. Select and delete the video.
4. Click **Update**.

The content item or comment is updated accordingly.

## 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.

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

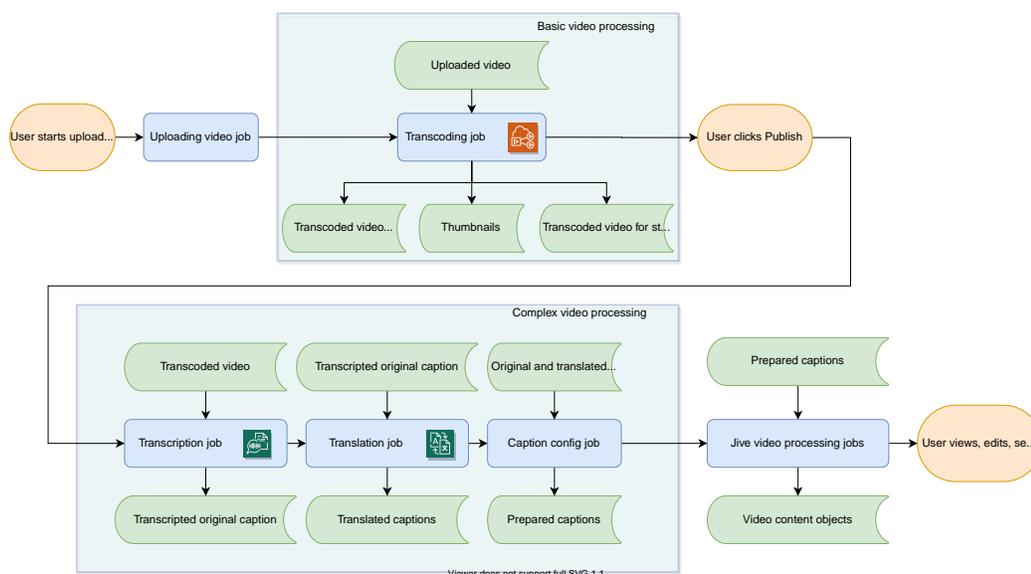
### Formats and limitations

You can find information about supported video and caption / transcription formats at [Supported video providers and formats](#) on page 145.

## How videos are processed: Uploading new standalone videos

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

**Figure 29: 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.

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](#) on page 134 and [Inserting inline videos into content items and comments](#) on page 120.

### 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.

## 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 <sup>(Perceptive)</sup>. 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 142.
- Perceptive Media for uploaded videos <sup>(Perceptive)</sup>

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

<b>Supported video formats</b>	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. These settings may be adjusted for your community. For the details, contact your community administrator.
<b>Supported caption / transcriptions file types</b>	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. These settings may be adjusted for your community. For the details, contact your community administrator.
<b>Supported image formats for thumbnails</b>	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. These settings may be adjusted for your community. For the details, contact your community administrator.

## Supported formats for uploaded videos <sup>(Perceptive)</sup>

<b>Supported video formats</b>	AVI, MOV, WMV, MP4, MPEG, FLV, 3GP, and 3G2
<b>Supported video codecs</b>	All of the popular MPEG-4 variants like DivX, XviD, H.264, 3IVX, MSMPEG4, and Windows Media 9
<b>Supported audio codecs</b>	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

## Video FAQ

Use these frequently asked questions to help you better understand Jive videos.

<b>When adding a video to a comment, will I see all videos when I browse Jive videos?</b>	When you insert a video into content, reply or comment by clicking <b>Browse &lt;community&gt; Videos</b> , you can choose from all videos published to the entire community, shared with you, or published to places you have access to, such as a private group
---	---

you belong to or a space you have permission to view.

**Should Your avatar > Your Content > Videos show all of the videos I've uploaded?**

No. You only see standalone videos  here that you've uploaded by using the create menu (). When you upload videos into content types, they do not show up in **Your Content** except as part of that content type.

**Can I mark videos as private?**

Video permissions are consistent with content type permissions. When you publish a video to a private place, it is only available to members of that place. If you publish a video to a select few users, only they are able to view that video.

**Can I embed videos from the Kaltura video platform?**

Yes, if your administrators allowed embedding videos from the platform. Note that the URL of the embedded video must include the `kaltura.com` part in order to pass validation for the Kaltura platform.

**Is there a reason why the same video may take different amounts of time to encode or complete the advanced processing work (transcription and translations)?**

If you attempt to upload the same video twice and notice a variance in the time it takes to encode, transcribe or translate it, that is impacted by the queue for AWS services at that time. This encoding time should not vary too significantly but there might be minor discrepancies when uploading the same video more than once.

**Is there a delay between my video being playable and when captions / transcriptions and translations become available?**

Yes. There is initial basic processing that transcodes your video so it can be played. Then there is secondary, complex processing that's required before automatic transcriptions and translations become available. Processing takes some time before an uploaded or edited video becomes available. For more information, see [About Jive Video provider](#) on page 142.

**Why are my thumbnails missing after publishing the video?**

Even if you upload several images for a custom thumbnail, only the image you've selected (framed with a blue outline) is saved and used. Other images are removed from the system.

## Copying content

You can copy a document as a new document, discussion, or blog post.

---

**Restriction:** You must be able to edit the document you want to copy.

---

Copying documents streamlines quite a few use cases, such as the following:

- Copy documents to different places if you want to push out a clean version and empty comments. This is great for posting release communications to different audiences, such as customers and partners.
- Use a document as a template that can then be used again and again to easily recreate documents. This is useful for processes in a company, or templates with agencies. For more information, see [Creating templates](#) on page 148.
- Work privately with your team and then push out a clean copy to the Support Center or even as a blog post to the News stream.
- Use ghost blogging where the ghostwriter authors the initial version. The publishing author does a copy-document on the initial version to publish it under their name.

To copy a content item:

1. Go to a document you can edit.
2. Click **Actions > Create a Copy** to open the **Create a Copy** dialog box.
3. Select the content type for the copied item from the available types.

The available options may differ if the place where the original document is stored does not support some of them, or you don't have permission to publish a particular content type there.

4. Click **Create a Copy** to create a copy of the document.
5. Edit the new item.

Note that the title, body, and tags have all been pulled in from the original document. You can edit all of these, as well as change the place for the content before publishing.

6. When you're finished editing, click **Publish**.

The new item is created based on the source item.

If you want to create a template from a document, see [Creating templates](#) on page 148.

## Creating templates

You can use the Create a Copy feature to create templates for yourself or others to use.

For example, you might want to create a baseline RFP for your salespeople to use that they can edit and add to before publishing it as a new RFP.

---

**Restriction:** You must be able to edit the document you want to copy.

---

To create a template:

1. Go to a document you can edit.
2. Click **Actions > Create a Copy** to open the **Create a Copy** dialog box.
3. Select the content type for the copied item from the available types.

---

The available options may differ if the place where the original document is stored does not support some of them, or you don't have permission to publish a particular content type there.

4. If you want to use the item as a template, copy the link provided under **Create a Template**, and then click **Cancel** to close the dialog box.

You don't need to publish a copy of this document.

5. Paste the link anywhere in the community, for example, in the Helpful Links tile in a place that you own.

When a user clicks the link, they are taken to the template (based on your original document) that they can edit and publish. They can change the title, body text, tags, and place of the new item; all of these are optional. If they make no changes at all, the new content is published exactly like the original but with a number inside square brackets in the title.

## Using Marking feature

You can turn a conversation into a real business decision or collaboration success story.

Collaboration and discussion are free-form in your community, but decisions and official versions should be marked clearly. The Marking feature allows you and others to mark items for Action, as a Success, and so on. Visual badges for these states let others know which document is Final, which comment became the Decision, or who has Action items as a result of the discussion.

You and other users can mark the replies or comments of:

- Blog posts
- Discussions
- Questions
- Documents

In addition, users with edit permissions on top-level items can mark the items as Final, Official, Outdated, Success, or for Action.

Your community manager may limit this feature to specific users and configure which marking options are available in your community.

## How Marking adds value

Here's an example of how to effectively use the Marking feature in your community.

Let's say the VP of sales has just published a discussion called "Possible Hotels for Sales Kickoff." In the post, she has included a list of hotels that are available, their amenities, and the pros and cons of each. She ends her post by @mentioning the Sales Kickoff group and inviting comments and opinions about the hotels. Over the next few days, over fifty comments are posted to the discussion.

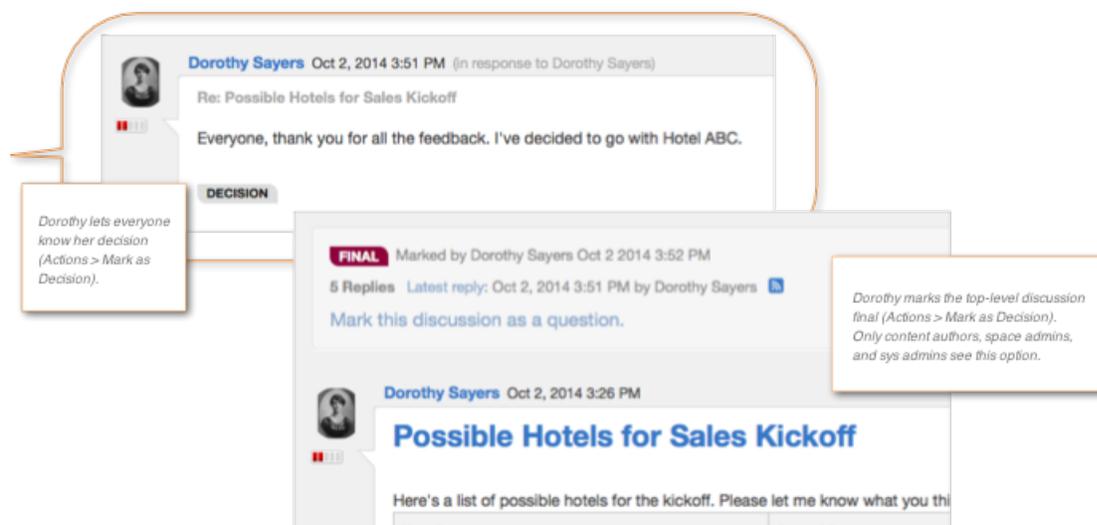
Here's what happens:

1. Two new hotels are suggested. Different thread participants mark those comments for **Action** ( **Actions** > **Mark for Action** ) and ask the commenters to provide the hotels' availability, amenities, and pros and cons. Those comments now have **Action Item** badges on them. You can click the badge to see any notes included with the action item.
2. The receptionist replies that she has dealt with Hotel ABC and highly recommends it.

The screenshot shows a Jive community thread titled "Possible Hotels for Sales Kickoff" by Dorothy Sayers on Oct 2, 2014 at 3:26 PM. The thread content includes a table with columns "Hotel" and "Amenities". Below the table, there are several replies:

- Agatha Christie** (Oct 2, 2014 3:33 PM): "Re: Possible Hotels for Sales Kickoff. I have some thoughts about Hotel Quince. We had a conference there one year and everyone loved it."
- Ngaio Marsh** (Oct 2, 2014 3:35 PM): "Re: Possible Hotels for Sales Kickoff. I loved my experience with Hotel ABC. They were professional at every turn."
- Bunny von Quince** (Oct 2, 2014 3:36 PM): "Re: Possible Hotels for Sales Kickoff. May I suggest Hotel France?" This reply has an **ACTION ITEM** badge. A callout box notes: "Agatha marked this reply for action and asked Bunny for details about Hotel France (Actions > Mark for Action)."
- Agatha Christie** (Oct 2, 2014 3:38 PM): "Re: Possible Hotels for Sales Kickoff. How about Hotel Portland, have we thought of them?" This reply has an **ACTION ITEM** badge. A callout box notes: "Dorothy marked this reply for action and asked Agatha for details about Hotel Portland (Actions > Mark for Action)."

3. The two new hotels that were suggested are now included in the list, and those actions have been resolved by their owners ( **Action Item** > **Resolve** ).
4. Based on the receptionist's and others' positive comments about Hotel ABC, the VP of sales decides that it's the best hotel for the Sales Kickoff. She adds a final comment to the thread explaining her decision and then marks it as the **Decision** ( **Actions** > **Mark as Decision** ).
5. Now, the VP marks the entire discussion as **Final** to let future readers know that the post has been discussed and decided on. At the top of the discussion, the **Final** badge is now displayed.



## Who can mark and unmark?

Different types of users have different permissions to mark and unmark items. The following tables list who can do what for comments, replies, and top-level items, as well as other rules of marking.

### For comments and replies

	Who can mark	Who can unmark	Requirements / options	Mark dependencies	Can Comm Mgr globally disable?
Mark as Decision	All users	Original marker, editor of top-level item	Note is required	None	Yes
Mark for Action	All users	Not available	Note is required, share is optional	Unmarking moved to Resolved list	Yes
Mark as Resolve	All users	Original marker, action participant	Note is required	Unmarking moved to Action item	Yes
Mark as Success	All users	Original marker, editor of top-level item	Note is required	None	Yes

	Who can mark	Who can unmark	Requirements / options	Mark dependencies	Can Comm Mgr globally disable?
Mark as Helpful	All users	Original marker, editor of top-level item	None	None	No
Mark as Correct	Editor of top-level item	Editor of top-level item	Only available on questions	None	Yes

Editors are users with permissions to edit the top-level content item. These users can see the Edit option in the Actions menu of the right sidebar when viewing the content item.

#### For top-level items (blog posts, discussions, questions, and documents)

	Who can mark	Who can unmark	Requirements / options	Mark dependencies	Can Comm Mgr globally disable?
Mark for Action	All users	Not available	Note is required, share is optional	Unmarking moved to Resolved list	Yes
Mark as Resolve	Original marker, action participant	Original marker, action participant	Note is required	Unmarking moved to Action item	Yes
Mark as Success	All users	Original marker, editor of top-level item	Note is optional	None	Yes
Mark as Final (discussions and documents only)	All users	Original marker, editor of top-level item	None	Mutually exclusive with Official and Outdated	Yes
Mark as Outdated (discussions, questions, and documents only)	All users	Original marker, editor of top-level item	URL is optional	Mutually exclusive with Official and Final	Yes
Mark as Official (discussions, questions, and documents only)	All users	Original marker, editor of top-level item	None	Mutually exclusive with Final and Outdated	Yes

	Who can mark	Who can unmark	Requirements / options	Mark dependencies	Can Comm Mgr globally disable?
Mark as Reserved (documents only)	All users	Original marker	Available on documents only	None	Yes
Mark as I have the same question (questions only)	All users	Original marker	Available only on questions	None	No
Mark as Assumed Answered (questions only)	Editor of top-level item	Editor of top-level item	Available only on questions	None	No

Editors are users with permissions to edit the top-level content item. These users can see the Edit option in the Actions menu of the right sidebar when viewing the content item.

## Searching for marked content

Marks are ranked differently in search results and have varying visibility options. The following tables list the visibility and searching options of marks for comments, replies, and top-level items.

### For comments and replies

	Appears in Searched?	Search rankings influenced?	Appears in content, people, places browse UIs?	Has a dedicated tile?	Can Comm Mgr globally disable?
Mark as Decision	Yes	Positively	Yes	Yes	Yes
Mark for Action	Yes	None	Yes	Yes	Yes
Mark as Resolve	Yes	None	Yes	Yes	Yes
Mark as Success	Yes	Positively	Yes	No	Yes
Mark as Helpful	No	None	Yes	No	No
Mark as Correct	No	None	Yes	Yes	Yes

**For top-level items (blog posts, discussions, and documents)**

	<b>Appears in Searched?</b>	<b>Search rankings influenced?</b>	<b>Appears in content, people, places browse UIs?</b>	<b>Has a dedicated tile?</b>	<b>Can Comm Mgr globally disable?</b>
Mark for Action	Yes	None	Yes	Yes	Yes
Mark as Resolve	Yes	None	Yes	Yes	Yes
Mark as Success	Yes	Positively	Yes	No	Yes
Mark as Final (discussions, questions, and documents only)	Yes	Positively	Yes	Yes	Yes
Mark as Outdated (discussions, questions, and documents only)	Yes	Negatively	No	No	Yes
Mark as Official (discussions, questions, and documents only)	Yes	Positively	Yes	No	Yes
Mark as Reserved (documents only)	No	None	Yes	No	Yes
Mark as I have the same question (questions only)	No	None	No	No	No
Mark as Assumed Answered (questions only)	No	None	No	No	No

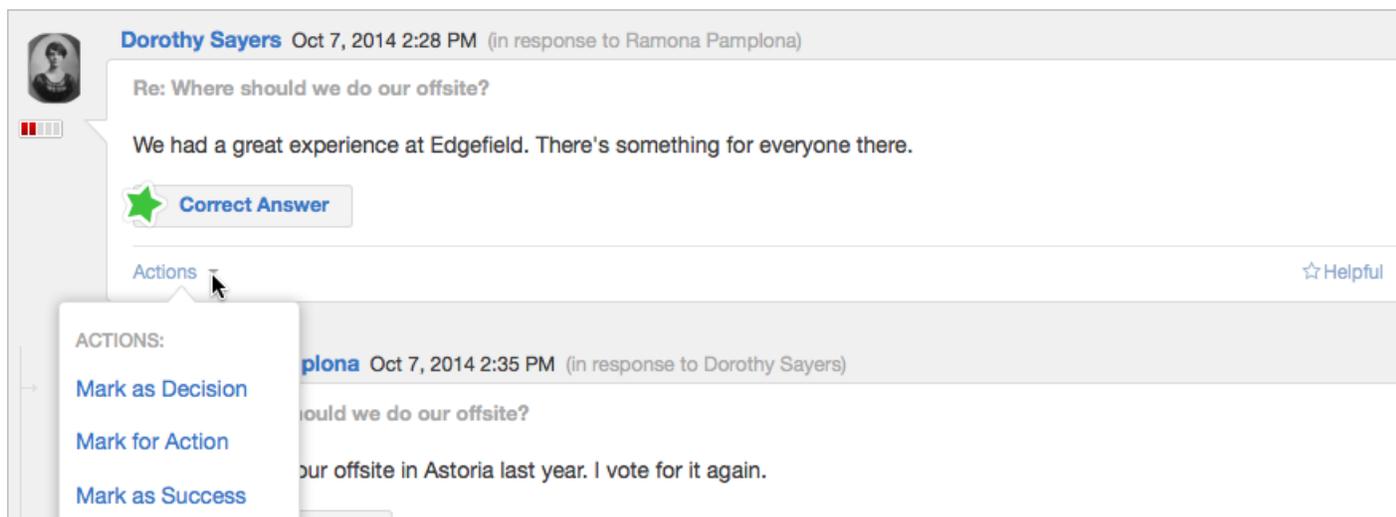
**Marking comments and replies**

You can mark the comments or replies of discussions, documents, or blog posts in places where you have permission to comment or reply. After you mark an item,

you see a badge on it. This helps others quickly see what has been decided on or a success, for example.

To mark a comment or reply:

1. Go to a discussion, question, document, or blog post and read through the comments or replies.
2. Select the mark you want.



The options are listed in the table below. You may not see all of these depending on how your community manager has set up the marking feature. For more information, see [Marking options for comments and replies](#) on page 156.

Options	Description
<b>Actions &gt; Mark for Action</b>	This mark shows others that this comment or reply needs action. You can mark for action for yourself this or, optionally, bring in other participants and leave them a note describing what you need them to do.
<b>Actions &gt; Mark as Decision</b>	This mark shows others that this comment or reply is a Decision. Note that there can be more than one comment or reply marked as Decision.
<b>Actions &gt; Mark as Success</b>	This mark shows others that the comment or reply was a collaboration success story for your community.
<b>Helpful</b>	This mark lets others know that this comment or reply contains helpful information.
<b>Correct Answer</b>	Only system administrators, place owners, and discussion authors can see the Correct Answer mark option and only on questions.

Note the new badge on the comment or reply. If you change your mind later, just click **Unmark** on this same item.

## Marking options for comments and replies

You can mark a comment or reply Helpful, Correct, Decision, Success, for Action, or Resolved. You may see all or only some of these marking options, depending on how your community manager has configured this feature.

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**Note:** The Marking feature is different from Tasks, which are a formal way to assign work tasks to people. For more information, see [Mark for Action or assign a task?](#).

---

When you mark a comment or reply, a badge appears that displays its state (for example, Helpful or Decision). These badges are visual indicators only; they do not prevent anyone from further commenting or marking any comments or replies as a Decision, Helpful, Resolved, Success, or for Action.

To see who marked the comment or reply and when, click its badge.

You may see all or only some of the following marking options, depending on how your community manager has configured this feature.

<b>Mark for Action</b>	<p>Choose Mark for Action to assign an action to yourself, and, optionally, bring in others. When you bring in others to help, note that doing so doesn't assign the Action item to them; it sends a notification to their Inbox about the action item. From there, they can Take Ownership of the action item.</p> <p>The Action Item badge on the comment or reply lets readers know that the item has been assigned to someone. Other users may Mark for Action other comments or replies as well.</p> <p>For more information on how to resolve your actions, see <a href="#">Resolving action items</a> on page 163.</p>
<b>Resolve</b>	<p>Choose Resolve on an Action (whether you own it or not) when you have completed the action. This lets others know that you've taken care of the issue.</p>
<b>Mark as Decision</b>	<p>Choose Mark as Decision to let others know that this comment or reply is the Decision or one of the Decisions. Other users may mark other comments or replies as the Decision as well.</p>
<b>Mark as Success</b>	<p>Choose Mark as Success to let others know that this was a collaboration success story for your community.</p>
<b>Helpful</b>	<p>Click Helpful to let others know that this comment or reply contains helpful information.</p>
<b>Correct Answer</b>	<p>Only system administrators, place owners, and discussion authors can see the Correct Answer mark option and only on questions.</p>

There can be only one Correct Answer. In addition, your community manager may disable this feature altogether.

## Marking top-level items

You can mark a top-level item (a blog post, discussion, question, or document) if you have edit permissions for it.

To mark a top-level item:

1. Go to the discussion, question, document, or blog post for which you have edit permissions.
2. In the **Actions** menu, select the **Mark as** option you want.

You may see not all or any of these depending on how your community manager has set up the marking feature.

Note the new badge at the top of the content item. If you change your mind later, you can always **Unmark** from the right side of the badge box.

For the list of marking options, see [Marking options for top-level items](#) on page 157.

## Marking options for top-level items

You can mark a top-level item (a blog post, discussion, or document) if you have edit permissions for it.

---

**Note:** The Marking feature is different from Tasks, which are a formal way to assign work tasks to people. For more information, see [Mark for Action or assign a task?](#).

---

You mark a top-level item from its Actions menu. You don't see this menu if you don't have edit permissions on the item.

After you mark a top-level item, a badge appears that displays its state (such as Final or Outdated). These badges are visual indicators only; they do not prevent anyone from further commenting or marking any comments or replies as a Decision, Helpful, Resolved, Success, or for Action. If you want to prevent further replies on a discussion or question, click **Lock** under the Actions menu.

You may see all or only some of the following marking options, depending on how your community manager has configured this feature.

<b>Mark for Action (discussions, questions, documents, and blog posts)</b>	Choose Mark for Action to assign the item to yourself or others. The Action Item badge lets others know that the content item is being reviewed.
<b>Resolve (discussions, questions, documents, and blog posts)</b>	Choose Resolve on an Action when you have completed it. This lets others know that you've taken care of the issue.

**Mark as Final (discussions, questions, and documents)**

Choose Mark as Final to let others know that the conversation is complete and no further discussion is encouraged. If you mark something Final, you cannot also mark it Outdated or Official.

**Mark as Official (discussions, questions, and documents)**

Choose Mark as Official to let others know that this is the official version of this item. This can be helpful for policies and company-wide communications such as the 2014 Holidays in an HR space or the company's Mobile Purchasing Policy. If you mark something Official, you cannot also mark it Final or Outdated.

**Mark as Outdated (discussions, questions, and documents)**

Choose Mark as Outdated to let others know that this is old information and no longer valid. This can be helpful for old procedures, policies, and processes such as 2011 Health Plan Coverage or Engineering Intern Projects 2012. If you mark something Outdated, you cannot also mark it Final or Official.

**Mark as Reserved (documents and uploaded files)**

Marking an uploaded file or a document as Reserved indicates that someone is currently editing it, so other users don't edit it until the Reserved badge is removed. It does not actually lock the file or document.

**Mark as Success (discussions, documents, and blog posts)**

Choose Mark as Success to let others know that this was a collaboration success story for your community.

**I have the same question (questions only)**

Choose this to let others know you have the same question. You see this only on questions that do not yet have a reply marked as the Correct Answer or Assumed Answered.

**Mark as Assumed Answered (questions only)**

Choose this to let others know that the question is assumed answered. You see this only on questions that do not yet have a reply marked as the Correct Answer.

## Mark for Action or assign a task?

You should understand the differences between Mark for Action and creating tasks and the best ways to use these features.

**Actions** Mark for Action is part of the Marking feature and allows you to assign content items to yourself for action, or invite others to review them and take ownership. Typically, you should use Mark for Action in an informal, on-the-fly manner when you're discussing something. For more information, see [Using Marking feature](#) on page 149.

**Tasks** Tasks are a formal way to assign and track tasks for yourself or others (  > **Task** or **Actions** > **Tasks** > **Create a task** ). You can assign the task a deadline and associate it with a project, such as Sales Kickoff January 2015, or save it as a personal task for yourself. All tasks that are associated with a project are displayed on the Tasks tab of the project. For more information, see [Using projects and tasks](#) on page 177.

## Mark as Decision or Correct Answer?

Understand the differences between Decisions and Correct Answers and the best ways to use these features.

**Decisions** Mark as Decision is designed to help you take control of a conversation in the comments section of a discussion, document, or blog post. Users can easily Mark as Decision, or Mark for Action to send it to someone else for review.

The Final and Official marks for a top-level item (discussion, question, document, or blog post) are additional ways to let users know that a decision has been reached and no further discussion is needed.

More than one comment or reply per discussion, document, or blog post may be marked as a Decision, Success, or for Action.

Note that you may see all, some, or none of these marking options, depending on how your community manager has configured this feature.

**Correct Answers** When the Correct Answers feature is enabled, only system administrators, place owners, and discussion authors can see the Correct Answer option on questions. There can be only one Correct Answer per question.

This feature is not limited to a certain type of space or group, but it is most useful in places that are specifically designed to answer questions quickly, such as a customer support space or a human resources group.

Community managers cannot configure the Helpful option. It is always available.

## Reserving files and documents

Marking an uploaded file or a document as Reserved indicates that someone is currently editing it so that other users shouldn't edit it until the Reserved badge is removed. It does not actually lock the file or document.

The Reserved badge provides important information about file status for anyone who can't use Jive for Office to edit and merge uploaded files, for example, Mac users. It can also be used to warn users of a published Jive native document that's not ready to be edited by other people yet. The Reserved badge doesn't prevent anyone else from editing, but it shows information about who is working with the item, making it easy for other people to check in with you before adding their own edits. Note that if you want to hide an in-progress Jive document before publishing it, you can just save it as a draft and share it with anyone you want to.

When an author or editor marks a file as Reserved, anyone can see who reserved the file and contact the person if they're unsure whether it's OK to proceed with editing. Anyone with the rights to edit a file or document also has rights to mark it as Reserved. When someone reserves a file, the author and anyone who has already edited the document receive an Inbox notification. You can filter content to find reserved documents, too.

### Differences in reserving Jive documents and uploaded files

**Jive native documents** Jive already provide an indicator when someone has started editing a document. (However, note that the lock on the document while someone is editing only lasts ten minutes, and after that, it's possible to edit the document and overwrite another user's changes.) Mark as Reserved replaces the need to put "WIP" or another indicator in the title when a document isn't in a state where you'd like other users to contribute. It shows an author or editor's intention to keep working on the document undisturbed until the next time that the author publishes it.

**Uploaded documents** Mark as Reserved warns users who don't use Jive for Office that publishing a new version could overwrite and invalidate a version someone is working on locally. (Windows users with Jive for Office have live merge capability and may not need this feature as much.) Marking a file as Reserved does not lock the document or prevent uploading another version. But any other user who clicks **Edit** with the intention of uploading a new file can see a message pointing out that the file is currently reserved for editing.

## Marking as Reserved

You can reserve a document or file to alert other users you're working on it. This doesn't lock the document, but it alerts other users that you are planning to update the item.

Reserving documents is especially useful if you're using uploaded files, but can't use the Jive for Office. The Reserved badge doesn't prevent anyone else from editing, but it shows information about who is working with the item, making it easy for other people to check in with you before adding their own edits. For more information, see [Reserving files and documents](#).

To mark a file as Reserved and remove to remove the marking:

1. Go to the document or file you want to reserve.
2. To mark the content item, click **Actions > Mark as Reserved**.

The Reserved badge is added at the top of the document.

3. To free the file for editing, use any of the following:

- Click **Unmark** next to the Reserved label on the document or file page.
- Publish the item. When you or anyone else publishes a new version, the Reserved badge is removed.
- Mark it as Final, Official, or Outdated. These markings override Reserved, and the reserved badge is removed.

## Managing your action items

Understand how to resolve, add participants, and manage your Actions.

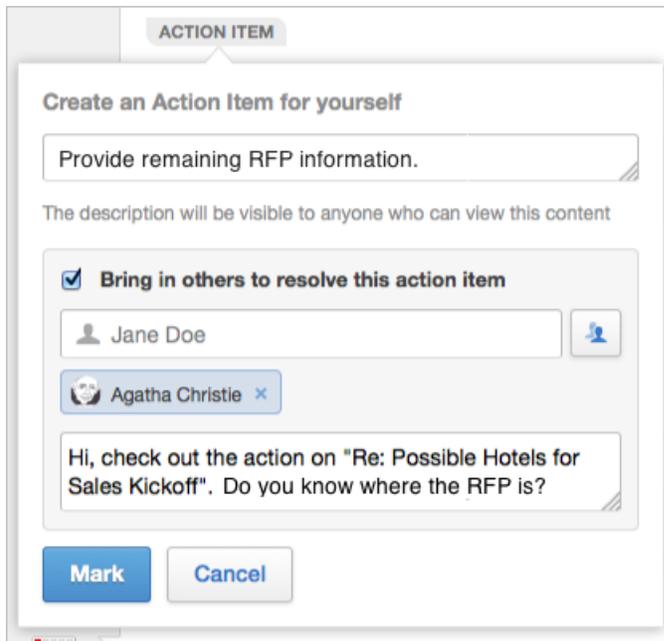
### Adding participants to action items

You can add participants to items that have been Marked for Action for you. This is a way to get help on an action item.

Bringing in other people on your Action Item notifies them that you need help and gives them the opportunity to Resolve the issue or Take Ownership of the action. Note that adding participants does not assign the action to them. For formal task management, you may need to use the task functionality. For more information about the differences, see [Mark for Action or assign a task?](#)

- To add participants to an existing action item that you own:
  - a) Go to the content item that is marked for action.
 

You can go to the item by searching for it or looking at your list of **Action Items** under the **Actions** tab in Inbox.
  - b) Click the **Actions** or **Action Item** badge.
  - c) Click **Add Participants** or .
  - d) Select the users you want to add to this action item.
  - e) Leave a note describing what you need.



The note shows up only in the participant's Inbox, so it should let them know specifically what you need from them, for example, Provide remaining RFP information.

f) Click **Mark**.

The new participants see an alert in their Inbox, along with your note. They can then **Resolve** or **Take Ownership** of the item.

- To add participants while creating an action item:
  - a) Go to the item and click **Actions > Mark for Action** .
  - b) Add a general description of the action that anyone in the community will be able to see when they click the Action Item badge, for example, Provide remaining RFP information.
  - c) Select **Bring in others to resolve this action item**.
  - d) Select the users you want to add to this action item.
  - e) Leave a note describing what you need.

**ACTION ITEM**

Create an Action Item for yourself

Provide remaining RFP information.

The description will be visible to anyone who can view this content

**Bring in others to resolve this action item**

Jane Doe

Agatha Christie

Hi, check out the action on "Re: Possible Hotels for Sales Kickoff". Do you know where the RFP is?

Mark Cancel

The note shows up only in the participant's Inbox, so it should let them know specifically what you need from them, for example, Provide remaining RFP information.

f) Click **Mark**.

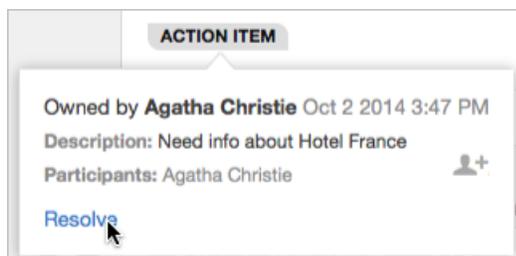
The new participants see an alert in their Inbox, along with your note. They can then **Resolve** or **Take Ownership** of the item.

## Resolving action items

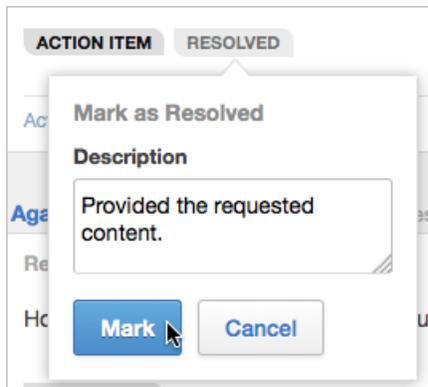
You can resolve action items and leave a note explaining why you are resolving it. The author of the top-level item and owners of an action item have permission to resolve action items.

To resolve something that's been Marked for Action:

1. Go to the item.
2. For comments or replies, click the **Action Item** badge and select **Resolve**.



3. Add a note explaining why you are resolving the Action and click **Mark**.



This note is visible to others, so it's helpful to describe how you resolved the action.

The Resolved badge appears on the content item.

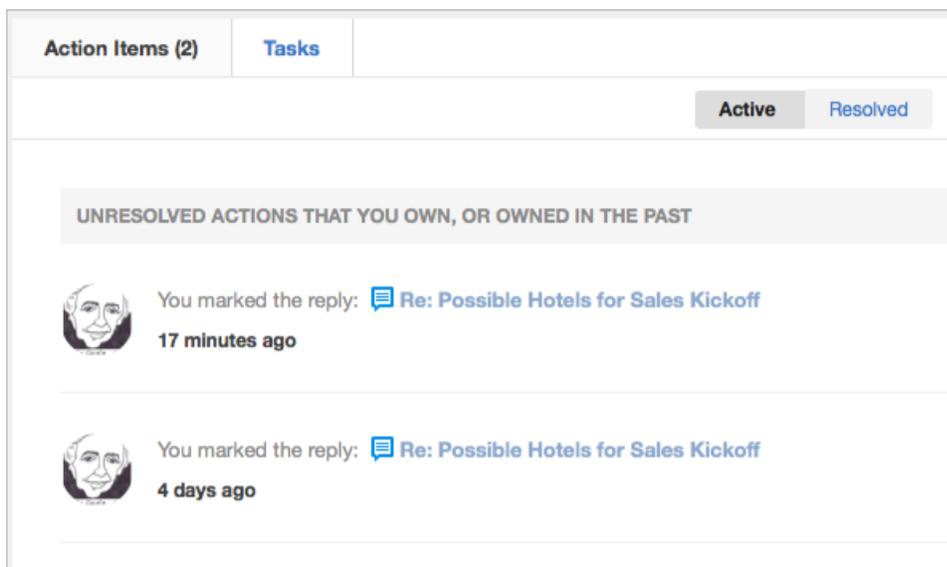
### Managing your action items

You can manage items that have been Marked for Action for you from the **Actions** tab of Inbox.

To manage Action Items that you own:

1. Go to  > **Actions** .

On the **Action Items > Active** tab, you can see a list of items awaiting Action from you.



2. You can do any of the following:

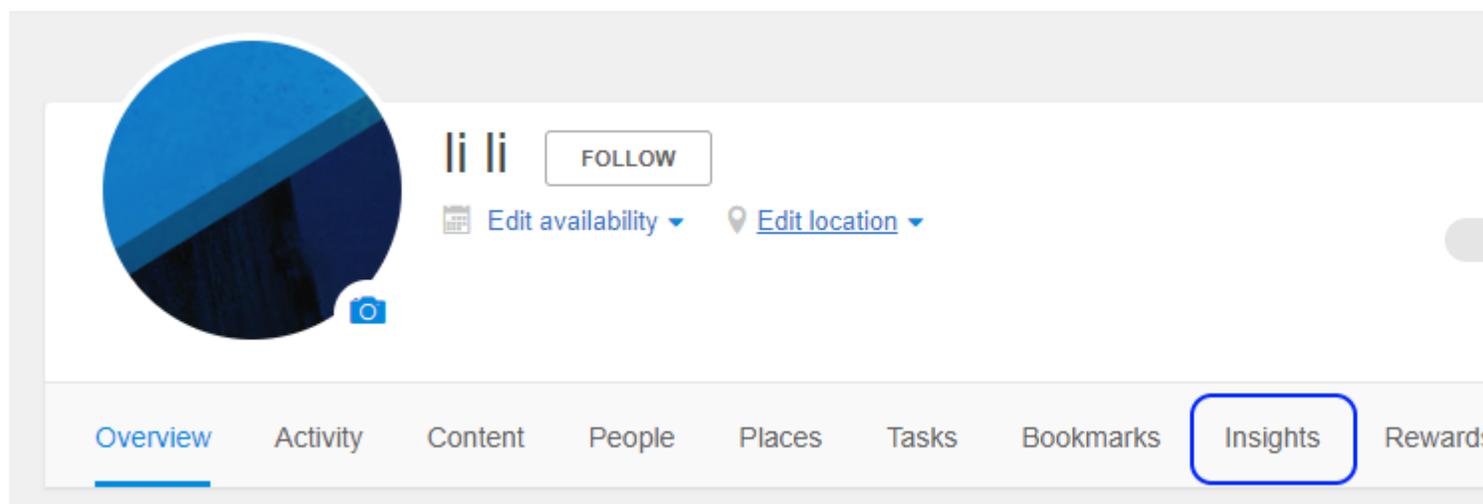
Marking Option	Description
<b>Resolve</b>	Add a description of your resolution so that others know what you did that resolved the item. When you Resolve an item, it is moved from the <b>Active</b> list to the <b>Resolved</b> list. If required, you can unresolve the item from the <b>Resolved</b> list.
<b>Add more people to the item ( Resolve &gt; View Conversation &gt; Add participants )</b>	Add other participants to this Action and leave them a note describing what you need. They can then Resolve or Take Ownership of the item.
<b>Go to the action item to review it in context by clicking on its title</b>	Lets you review the full conversation. From there, click the <b>Action Item</b> badge and <b>Resolve</b> the item or <b>Add Participants</b> to bring in more people on this item.

## Using Personal Insights

You can use Personal Insights to gain visibility into your community contributions.

Personal Insights provide analytics for the content you have created for your community. We derive this data from your event activities in your community and base it on any activity that you have engaged in. You can use this feature to gauge how the community responds to your content and to see your activity all in one place.

- To find your Personal Insights, click **Your avatar > View Profile** , and then click **Insights**.



**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.

## Making your content more engaging

*It may seem obvious that good, clear writing draws people in. Writing well takes practice. Getting people to actually open your blog post requires it to stand out as it whizzes by the community. Improving your writing and getting readers to read your content are ways you can better your Personal Insights.*

Here are a few tips you can use to grab your audience's attention:

- Write clearly using catchy, descriptive titles.
- Become familiar with your community, and keep them in mind when you write.
- Be consistent. By writing a blog post every Monday, people will learn to look for it.
- Let your personality shine through! People want to learn your insights.
- Read it out loud. You can catch the snags that detract from your writing flow.

As you gain the attention of your community, think about how to get people to interact with your content. Start with a clear idea of what you need from readers. If you have a specific question, ask it! If your community supports polls, you could also link to a poll, asking people to participate. If you have something specific to communicate, state it early on, so people don't miss the point.

You should also find someone to review your content, especially if you think it's perfect. Hint: It's usually not perfect, even for the pros. Hearing someone's perspective on your writing helps you remove anything that distracts from your point, which gives it impact.

For more tips on writing, check out these classic books:

- The Elements of Style by William Strunk Jr.
- On Writing: A Memoir of the Craft by Stephen King
- On Writing Well: The Classic Guide to Writing Nonfiction by William Zinsser

## Reaching your community

Personal Reach, Global Impact, and Sentiment summarize your effect on the community, how well you contribute, and reactions to your contributions using data from the past 12 months.

You can use these tools to continuously improve how you present content to the community. You might strive to increase your numbers or to get a positive sentiment. Here's help interpreting the values:

**Personal Reach** Shows the percentage of community members seeing your content using mobile devices and the web.

**Global Impact** Shows how the community reacts to your content by looking at their social actions, such as bookmarks, comments, likes, shares,

and views. Personal Insights uses averages over the past 12 months to calculate this number.

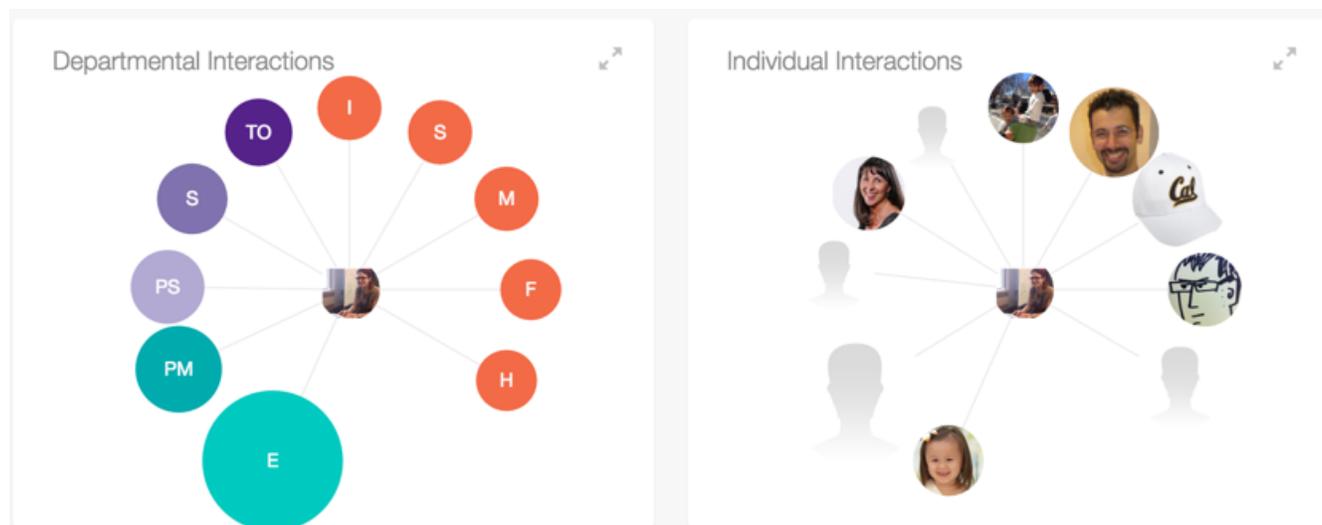
### Sentiment

Shows how well your content resonates with your community. Content can achieve Neutral, Good, or Excellent sentiment based on social action and views. Personal Insights uses averages over the past 12 months to calculate this value.

## Understanding interactions

To calculate your interactions, Personal Insights uses your social actions with other community members and averages those using weighted metrics.

Personal Insights derives the metrics from your different social interactions, giving activities like sharing an object a higher weight than commenting. You can either see your interactions with other individuals or with entire departments.



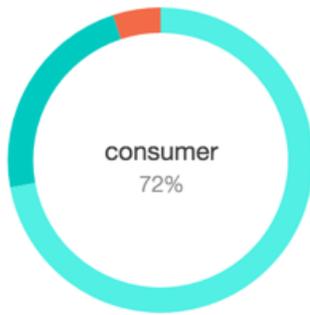
## Characterizing profile type

Your overall profile type status and pie chart are based on the level of different participation types that you engaged in during a month.

Personal Insights determines the participation type for a given day, based on the classifications established in the Events mapping document and then reports back the percentage of time you were Contributing, Consuming, or Participating for a given month. You can find the Events mapping document [Engagement Analytics Events Classifications - Participation Ladder and Engagement Ladder](#) on Worx.

For example, consider a 30 day period. In the 30 days, the first 20 days the user was classified as a participant, and the next 10 day the person was classified as a contributor. The display should say "Participating 66.67%", the pie chart would have two pie charts - Participant 66.67% and Contributor 33.33%.

Profile Type



## Visualizing your personal impact

*The Personal Impact section of your Personal Insights lets you see your monthly tally of content created, likes given, content shared, views received, likes received, and helpful answers received. Content includes docs, blog posts, discussions, questions, polls, ideas, comments, tasks, uploaded files, and status updates.*

You can try changing the way you blog or add images to your documents and see if reactions change. Maybe you get more likes when you announce a big project, but more comments when documenting a process. Try to figure out why certain blog posts are more popular than others. Have fun with it!

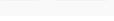
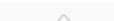


## Tracking popular content

Popular content is content that evokes the most reactions. You can sort content by the top 20 most views, comments, likes, or shares.

The rank is based on the absolute count of a given metric. For example, the Top 20 commented items ranked on the number of comments per document.

- Click a header in the popular content table to sort by a particular interaction and see the top 20 items in that category.
- Check out **View Trends** to see the sparkline, which represents a view for the entire year.

Popular Content	View Trends	Views	Comments	Likes	Shares
 Current Docs Test Instances		616	4	1	1
 Tech Professionals Needed to Help Skills Building @ New Avenues		563	18	11	5
 Advice for a kid who wakes up in the middle of the night?		419	0	0	10
 Problem Children (Identifying Gaps in API Documentation)		375	17	5	2
 Bespoke Wine Club (That Delivers)		258	5	6	0
 How do you look out for your top 5 Jivers?		250	0	3	0
 Which Old Docs Should We Keep?		246	14	1	1
 Please Review SP Online Web Parts Docs		238	0	0	0
 Editing the Docs Landing Page		218	1	2	1
 Docs To Dos		188	0	2	1
 Storage device for visual media and music?		182	0	1	1

## Using Impact Metrics

Use Impact Metrics to gain insight on how documents and blog posts are received by the community, including their Global Reach, Impact, and Sentiment.

Additionally, if your community is connected to Cloud Analytics, you can see more features, such as:

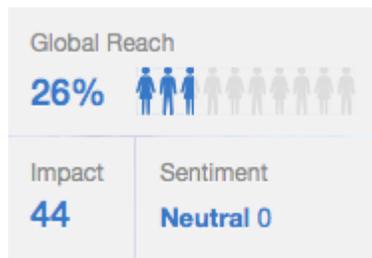
- Impact metrics for discussions
- Number of subscribers
- List of top departments
- List of top referrers
- Number of emails generated by your content

## Understanding Impact Metrics

There are two views of Impact Metrics: summary with a metrics overview and detailed that provides details to the summary.

The summary view highlights the calculated metrics for global reach, impact, and sentiment. Content in private and secret groups shows viewers instead of global reach. The detailed view provides calculated metrics shown in the summary plus an email metric, a graph of social actions that contribute to the metrics, and details about viewers and referrers.

The summary view of calculated metrics can be found in the sidebar of your published content:



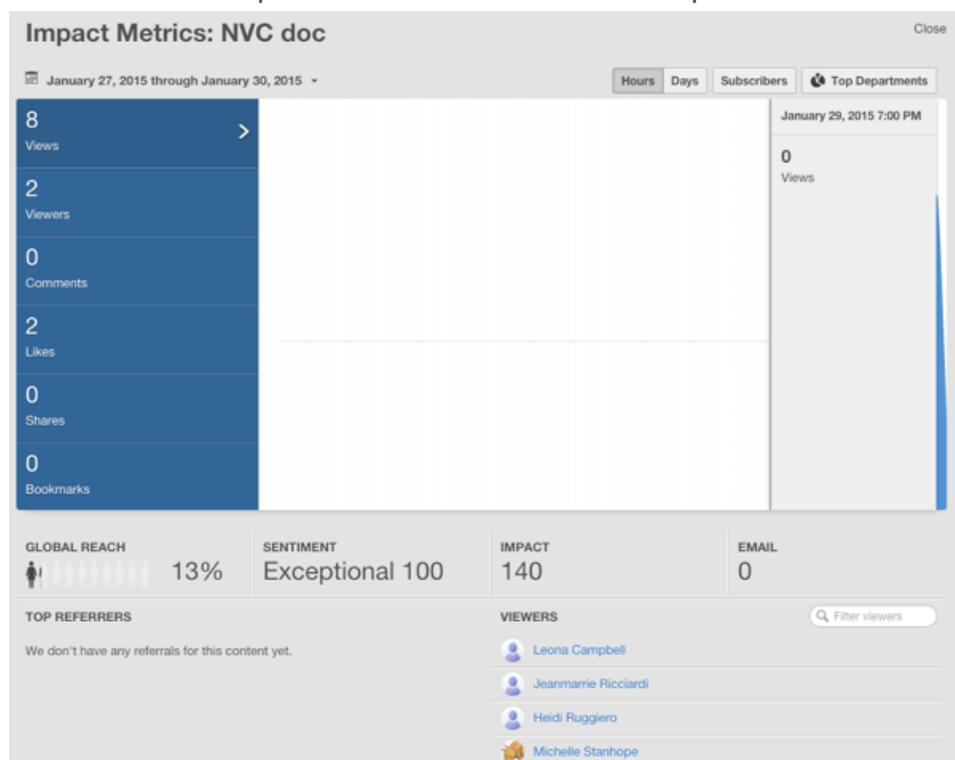
When you click **View More**, you see the detailed view of Impact Metrics. For more information on the detailed Impact Metrics, see [Using detailed view](#) on page 171. The following calculated metrics are available for supported content type:

- Global Reach** Conveys how widely viewed your content is in your community. We use a calculation based on the number of registered users and include web and mobile views only. This calculation does not include those following content via email.
- Viewers** In private groups, you see Viewers instead of Global Reach. These are the unique viewers who have looked at your content.
- Impact** Shows how your audience reacts to your content by looking at their social actions, such as Bookmarks, Comments, Likes, Shares, and Views.
- Sentiment** Indicates how well your content resonates with your audience. Content can achieve Neutral, Good, or Excellent sentiment based on social action and views.

For more technical information on how impact metrics are counted and how you can use them to your advantage, see [Deep Dive: Impact Metrics](#) on Worx.

## Using detailed view

In the sidebar of your content items, where you see the calculated metrics, click **View More** to open the detailed view of Impact Metrics.



The Impact Metrics detailed view shows a graph with the number of Views, Viewers, Comments, Likes, Shares, and Bookmarks of your content by date. It also gives you the calculated metrics, which are the global reach, impact, sentiment, and email. For videos, Impact Metrics shows more specific details, such as an average duration of the view and retention.

Use these metrics to see how your content is being received in the community.

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**Note:** Some features described in this topic are only visible for communities which use Cloud Analytics.

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### General metrics

**Global Reach** Conveys how widely viewed your content is in your community. We use a calculation based on the number of registered users and include web and mobile views only. This calculation does not include those following content via email.

**Viewers** In private groups, you see Viewers instead of Global Reach. These are the unique viewers who have looked at your content.

**Impact** Shows how your audience reacts to your content by looking at their social actions, such as Bookmarks, Comments, Likes, Shares, and Views.

**Sentiment** Indicates how well your content resonates with your audience. Content can achieve Neutral, Good, or Excellent sentiment based on social action and views.

**Report Dates** You can adjust the report dates in the upper left corner of the detailed Impact Metrics graph. Either enter a custom date range that focuses on a specific period of time, or select a pre-configured report period that shows the first 7, 30, or 60 days of publishing the content.

---

**Note:** Impact Metrics are real time, so expect to see new viewers right way.

---

**Daily or hourly data** When you click **daily** or **hourly** and then hover over the graph, you see data for more specific chunks of times.

**Show Only Subscriber Metrics** If your community has the News enabled, then you can click **Subscribers** to see how many of the viewers clicked through to view this content from their News stream. When News is disabled, you will not see the **Subscribers** button.

**Data by Department** If you want to look at which departments have the most Views, Viewers, Comments, Likes, Shares, and Bookmarks, then click **Top Departments** in the top right of the detailed Impact Metrics graph.

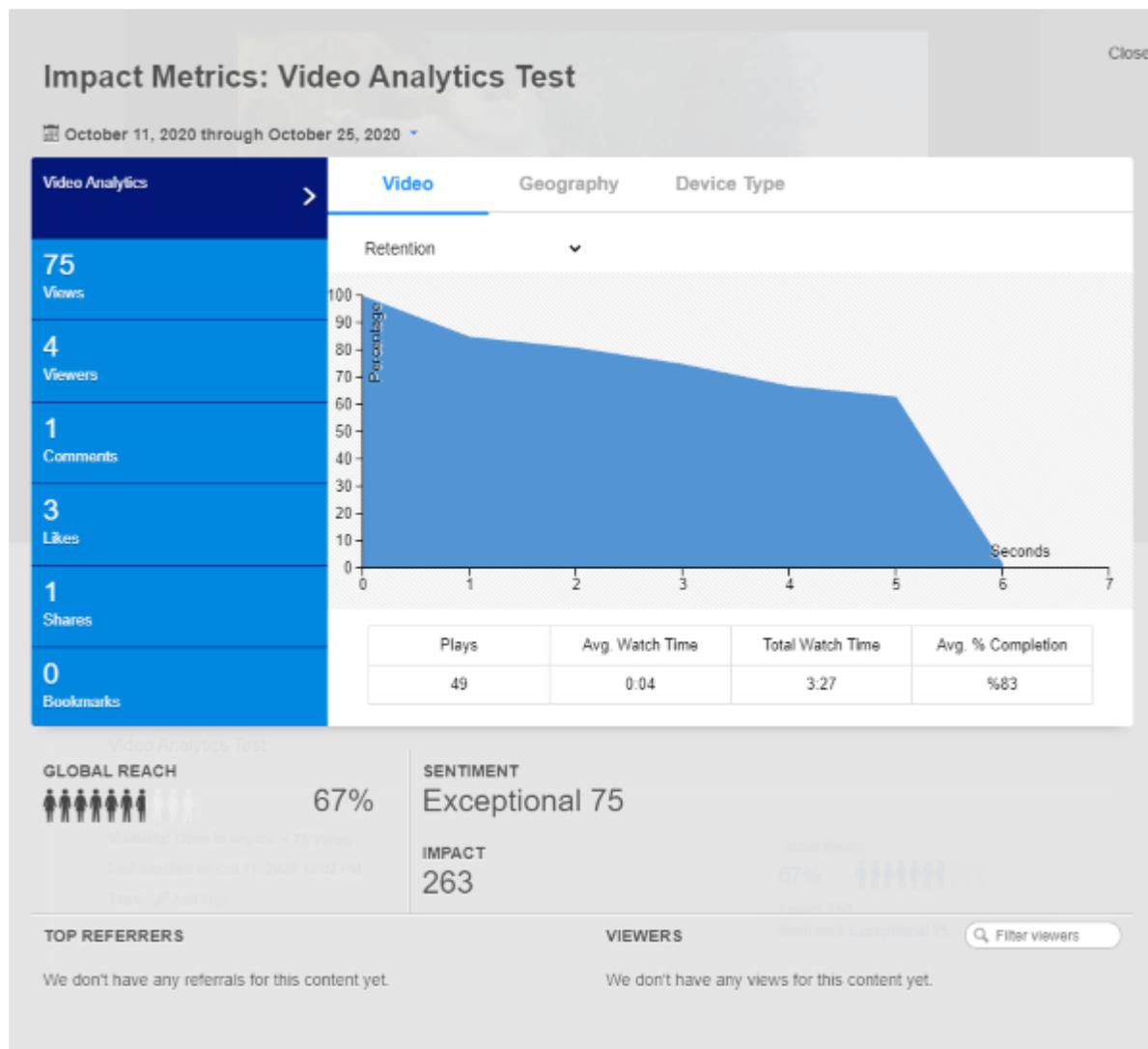
**Email** Counts how many email notifications occur when one of the following events happen:

- Use @mention in content, comments, or replies.
- Share content.
- Add collaborators to content.
- Reply to discussions, or comment on blog posts, videos, or documents.
- Create content when someone who follows you has email notifications enabled.

**Viewers and referrers** Viewers tell you who's looking at your content, and top referrers tell you who's generating interest in it. For more information, see [Who is viewing and referring your content?](#) on page 175.

## Video-specific metrics

Figure 30: Impact Metrics of a video



The **Video** tab shows how people watch your video:

### Average view duration

The average watch time metric shows the average time the video has been watched.

Average watch time = the time the video has been watched in the selected period / the total number of unique users

The **Video Analytics > Video > Avg. Watch Time** graphs show the values for the selected period. And the table underneath shows the average view duration for all time the video exists.

### Play rate

The Plays metric shows how many times the video has been played. In this, plays are different from views: views count the openings of the video page, while plays count the times user started watching the video, including replays.

The Play count is increased once a user hits Play on the video

The **Video Analytics > Video > Plays** graphs show the values for the selected period. And the table underneath shows the total plays in the selected period.

**Audience retention**

The retention metric shows how viewers watch your video. Do they watch till the end or stop in the middle?

Retention shows the number of plays for a video moment as a percentage of the total number of video plays.

The **Video Analytics > Video > Retention** graph shows the values for the selected period.

Just because a viewer didn't get to watch your video completely, that doesn't mean that they didn't engage with it. They may have found the answer they searching for or leave the video for later.

**Total Watch Time**

This metric shows the total time the video has been played after its creation.

Total Watch Time = all time the video has been played

**Avg. % Completion**

This metric shows which part of the users watched the video till its end. This value is counted for all time the video exists.

Avg. % Completion =

The **Geography** tab shows playback locations where people are engaged. This may be especially relevant for geographically spread communities.

**Where the video was played**

The graph under **Video Analytics > Geography > Heat Map** visually demonstrates where you where the video is played the most – or the least.

The number of users from a country (by IP) who played the video

**Playback locations versus watch time**

The tables under **Video Analytics > Geography > Top Performing Countries** present you the total views by country and the average view duration based on where the video was played.

The **Device Type** tab segment views by device.

**Views by device**

Jive segments all views by device type: desktop, mobile phone, or tablet. If the device cannot be recognized the view is counted under *unknown*.

For more technical information on how impact metrics are counted and how you can use them to your advantage, see [Deep Dive: Impact Metrics](#) on Worx.

## Where are the Impact Metrics for this?

If you don't see impact metrics for a content type, you either don't have permission to view them, or they're not available to that type of content.

Authors and a few others can use Impact Metrics as a way to measure how the content is received by the community.

---

<b>Who can see impact metrics for documents, discussions, and videos?</b>	The content author and everyone with admin rights can see the Impact Metrics. When you publish the metrics to everyone, then everyone who can view the content can see the Impact Metrics for it. For more information, see <a href="#">Publishing Impact Metrics to everyone</a> on page 176.
<b>Who can see Impact Metrics for blog posts?</b>	The content author and the group or space owner can see the Impact Metrics. When you publish the metrics to everyone, then everyone who can view your blog post can also see the Impact Metrics for it. For more information, see <a href="#">Publishing Impact Metrics to everyone</a> on page 176.
<b>What types of content show Impact Metrics?</b>	Blog posts, documents, discussions, questions, and videos show Impact Metrics.

## Who is viewing and referring your content?

You can find out who's viewing and who's referring your content by looking underneath the detailed Impact Metrics graph.

### Viewers

If enabled in your community, find out who has viewed your content when you look under the Impact metrics graph in the detailed view. Only the standard access user can see this viewers panel, and external contributors can never see it. From the Viewers panel, you can search for viewers based on first name, last name, and title.

### Top referrers

If enabled in your community, see whose referrals gained new viewers to your content. It's under the detailed view of the Impact Metrics graph. You also see how many viewers have been referred by that user. Only the standard access user can see this viewers panel, and external contributors can never see it.

## Improving your impact

Improve your Impact, Global Reach, and Sentiment by sharing your content with either the entire community or just a few colleagues.

Consider your audience when posting or sharing content. If you're posting something that only Sales need to pay attention to, then post it to the appropriate Sales group. If you already posted your content in a place where it's not getting the attention you need, then you can move it, or try @mentioning the appropriate group or users in your status update to get the right people to see your content.

When you share content with the right set of people, you can really improve your impact. Sharing with users who interface with a lot of people can make your content much more visible – if these users interact with it, it shows up in **Top & Trending**. For example, many managers and executives are superstar users because people who report to them pay attention to what they do.

## Publishing Impact Metrics to everyone

You can expose Impact Metrics to everyone who has permission to view your content.

When you're ready to show everyone the Impact Metrics on your content:

1. Go to the sidebar and hover over the calculated metrics.
2. Click the pencil edit icon when it shows up.
3. Select **Make these Impact Metrics public**.

## Translating content

You can translate content that you and other community members created, without leaving your Jive community.

If Content Translation Service is enabled in your community, you can see a **Translate** link in the **Actions** menu of published content, including comments.

- To translate the user-generated content into your default language, click **Translate**.



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**Note:** Your default language is the language that your Jive application is in. You can view your default language by clicking **Your Avatar > Preferences** and looking under **Language**. For more information, see [Supported languages](#).

---

- Comments are translated separately. Go to the comment you want to translate, and click **Translate**.



- If you want to translate into a language other than your default, click the drop-down arrow next to **Translate** and select a language from the list that appears.



- After content is translated, **Translate** changes to **Undo Translation**. Select that link, leave the page, or refresh the page to return the content to its original language.

**Tip:** The **Translate** link translates user-generated content only. If you want to use Jive in a different language, change your default language by clicking **Your Avatar > Preferences** and selecting a different **Language**.

---

## Using projects and tasks

Projects and tasks are a great way to turn collaboration into action and track your progress.

A project is a great way to give collaborative work a context that is time-based and outcome-based. With a project, you collect content in a way that focuses user work along with a schedule toward a specific goal. You can then create and assign people tasks and sub-tasks associated with the project to make sure everything gets done.

### Overview of projects and tasks

Jive projects provide lightweight project management with tasks, due dates, checkpoints, and notifications.

A project can contain various content types, including tasks. You can create tasks, assign them to people, set due dates, and mark them as complete. Once you enter all the tasks for a project, you can edit or delete them, add sub-tasks, set up email notifications on tasks, and mark tasks complete. As with other content, you can assign tags to tasks.

You can add checkpoints to a project as a way of making sure your project is proceeding on track. A checkpoint is a named place in the schedule, and it's often used as a point at which to make a decision about what to do next.

To help you manage your project progress, Jive provides visual cues that snapshot the project. On a project's home page, you get a checkpoint timeline that shows where your checkpoints are between the project's start and finish, and where the current date falls on the timeline. A project calendar captures task due dates and checkpoint dates in a traditional calendar style.

### Creating projects

You can create and configure projects for collaborative work.

If you use the checkpoint and status functionality for tracking project tasks, you can use the old-style Overview page rather than using the Activity page in the place template format. The widgets in the Overview page more effectively support projects at this time.

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**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](#).

---

To create a project:

1. Click  > **Project** .

2. In the dialog box, select a location for the project.

Projects are associated with a place, such as a space or a group. The place you choose determines who can see and collaborate on the project.

3. In **Name**, specify an identifying name for the project.

4. In **Description**, enter a brief description.

The description appears in the user interface.

5. In **Project Start Date** and **Project End Date**, specify the project duration.

You should use the target date for completing the project.

6. If necessary, change the project owner in **Project Owner**.

The default owner is the person creating the project.

7. In **Tags**, specify tags that can be used to find this project.

8. If available, in **Categories**, select the place category of the project.

The place categories are used to identify places while browsing. They are used to classify places and differ from content categories. This option is available if place categories are configured in your community.

9. To enable the Overview page, click **Advanced Options** and select the **Overview page** check box.

By default, your project uses an Activity page as its main page 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. This option is available if widgets are enabled in your community.

10 Click **Create Project**.

The project is created.

11 If you are using the Activity page, apply a place template to this project, as described in [Applying place templates](#).

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**Note:** The default template is Team Collaboration. For more information, see [General place template reference](#).

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The project is created and you can add tasks to it. For more information, see [Creating tasks](#) on page 179.

Additionally, you can further customize the project. For more information, see [Place Templates for designing activity and custom pages for places](#).

## Deleting projects

When you delete a project, you remove the entire project, including its content, from the system. You cannot undo a project deletion.

When a project and its content are deleted, the links and @mentions to the deleted project are replaced with the "The specified item was not found" message. To avoid this, you can archive the project instead of deleting it. For more information, see [Archiving projects](#).

To delete a project:

1. Go to the project and click **gear icon** > **Delete project** in the upper right corner.
2. Confirm the project's deletion by clicking **Delete**.

The project and all its content are deleted from the application.

## Creating tasks

You can create personal tasks for yourself or assign tasks for others and associate them with projects.

Note that you can create tasks that are unassigned to a project only for yourself. These tasks are called personal, and they are available only for you. If you want to create tasks for other users, you must assign them to projects.

To create a task:

1. From the main navigation menu, click  > **Task** .
2. In **Description**, provide a brief overview of the task.
3. In **Project**, select a project for this task.

The default selection is **None**, which means it is a personal task for yourself and only visible by you. You cannot create personal tasks for other people. By default, the task is assigned to you.

4. To assign the task to someone else, click "x" next to your avatar, and then select the user to whom the task must be assigned.
5. In **Due Date**, enter the date you want this task to be completed by.

The default due date is tomorrow.

6. If you want to use the content editor to describe the task and add tags to it, click **Advanced** and fill in the necessary details.
7. Click **Add Task** to add the task.

Tasks assigned to projects are displayed on the project **Tasks** page. Personal tasks appear on the **Tasks** page of the user.

## Managing tasks

You can edit a task, add a sub-task, delete a task, and follow it in a stream. You can do this from either your personal task list ( **Your Profile > Tasks** ) or a project's task list ( **Project > Tasks** ).

To manage tasks:

1. To view your tasks, including your personal tasks and project tasks, go to **Your profile > Tasks** .
2. To view project tasks, go to **Project > Tasks** .
3. To view task details, click **Show details** next to the task.

This opens the task description and the task menu.

4. Select one of the available actions: edit a task, add a sub-task, delete a task, or follow it in a stream.

## Completing tasks

There are two ways to manage and complete tasks: through your personal tasks list or the tasks list associated with a project.

1. To view your tasks, including your personal tasks and project tasks, go to **Your profile > Tasks** .
2. To view project tasks, go to **Project > Tasks** .
3. Select the check box to the left of the task you want to complete.

You can briefly see the task with a line through its text before it disappears completely from the list. If you want to see the completed tasks, select the **Include completed** check box under **View**.

## Importing and exporting tasks

Tasks can be transferred between Jive projects and other tasks management tools. Jive uses comma separated values (CSV) files to import or export task data in bulk.

### Importing tasks

Tasks can be imported into Jive projects from CSV files with commas used as separators. You can map the columns in a CSV file to the Jive task fields after the file is uploaded to Jive.

A template of a CSV file can be found [here](#).

To import tasks into a Jive project:

1. Export the information from your other project management tool, saving it as a CSV file with commas used as separators.
2. Go to your project in Jive and click **Import/Export Tasks** in the **Actions** list.

3. On the **Import/Export Tasks** page, under **Import tasks from a CSV file**, click **Browse** to locate the CSV file you exported, and then click **Upload File**.

After the file is uploaded, the page shows the column titles for Jive tasks (such as **Description Field**, **Assigned To Field**, and **Due Date Field**), with dropdowns that list column titles found in the CSV you're uploading.

4. Use the dropdowns to map a different CSV column title to each of the titles in the Jive project.

This determines where the information goes in the Jive project. The page displays a preview using the information found in your CSV file.

5. Click **Proceed** to accept the mappings.
6. Clear check boxes for those items you don't want to import.
7. If necessary, click the **Edit** link for a task to edit task information before you import it.
- 8.

The imported tasks are linked to the project.

## Exporting tasks

Tasks can be exported from Jive projects into CSV files with commas used as separators.

To export tasks from a Jive project to a CSV file:

1. Go to your project in Jive and click **Import/Export Tasks** in the **Actions** list.
2. On the **Import/Export Tasks** page, under **Export tasks to a CSV file**, specify exporting options:
  - a) Select which tasks should be exported: **All** or **Incomplete tasks only**.
  - b) Select if **Username** or **First/last name** should be used.
  - c) Select if the CSV file should be encoded for Microsoft Excel.
3. To export only some of the filtered issues, click **Choose Tasks**, clear the check boxes for the tasks you don't want to export, and then click **Export Selected Tasks**.
4. To export all filtered issues, click **Export**.

The CSV file with the exported tasks is downloaded to your computer.

## Mark for Action or assign a task?

You should understand the differences between Mark for Action and creating tasks and the best ways to use these features.

**Actions** Mark for Action is part of the Marking feature and allows you to assign content items to yourself for action, or invite others to review them and take ownership. Typically, you should use Mark for Action in an informal,

on-the-fly manner when you're discussing something. For more information, see [Using Marking feature](#) on page 149.

**Tasks** Tasks are a formal way to assign and track tasks for yourself or others (  > **Task** or **Actions** > **Tasks** > **Create a task** ). You can assign the task a deadline and associate it with a project, such as Sales Kickoff January 2015, or save it as a personal task for yourself. All tasks that are associated with a project are displayed on the Tasks tab of the project. For more information, see [Using projects and tasks](#) on page 177.

## Public and private communications

To enjoy the full power of Jive, we recommend keeping discussions and documents public whenever possible. The following topics describe the visibility options for content, as well as the security of the application for users.

### Security of content and activities

Your organization has deployed Jive to provide a place for you to get your work done by contributing to and collaborating in the community. Your activity in Jive is safe and secure.

Your company owns your activity in the community, just as they own your activity in your company email program. For more information on who can see your content and how visibility works in Jive, see [Content visibility](#) on page 182 and [Content visibility options](#).

#### Related information

If you're concerned about the security of Jive and want to get a deeper understanding of how your information is protected, see the security overview on the Security page on the Jive Software website at <http://www.jivesoftware.com/social-business/engage-employees/technology/security/>. Alternatively, you can see [Jive Security](#) in the Community Administrator Guide.

### Content visibility

The visibility of the content depends on the place where you published it. Different places have different visibility permissions.

In Jive, people post content in places. This means that all content (such as discussions, documents, and blog posts) is published in *containers*. A container can be a space, sub-space, group, project, or your own personal content. All places have visibility permissions set by the place owners that determine who can see the content posted in that place.

While it's best to keep things public whenever possible so that other community users can benefit from all of the content pieces (such as discussions or documents), there are times you may want to publish things only for yourself or a handful of other people. In addition, you may want to keep entire categories of content private, for example, accounting or human resources information. In that case, you can create a space or group with the content visibility options that you need. For more information about permissions, see [Managing Permissions](#) in the Community Administrator Guide.

For more information about the security of the community, see [Security of content and activities](#) on page 182.

## Content containers

Here you can find the types of containers in which you can publish content in the community.

### Your personal content

Your personal container is where you can store your documents and other content types that are hidden or limited to specific people. Your personal tasks are also stored here.

To see your content that is limited to only you or specific people:

1. Go to **Your Avatar > Your Content > Authored > <Document type>** .

This opens your personal container where you can find the content items of different types and filter them.

2. Select **Filter by personal content** to see content pieces available only to you.

A dark lock icon next to the item indicates it is limited to you; a light lock icon next to the item indicates it is limited to you and the other designated people.

You can find your personal tasks on your profile page or in the project. For more information, see [Managing tasks](#) on page 180.

### Groups

Different types of groups have different content visibility permissions. For more information about the various options, see [Types of groups](#) on page 60.

To view the content of a group:

- Go to the group and open the **Content** tab.

You can filter the content by type to view, for example, discussions or documents.

## Spaces

Spaces have complex content visibility options that are set up by the owners of the space. Also, spaces can be configured to contain some content types. For example, you may not be able to create a discussion in Space A, but you can in Space B. You can see the allowed content types on the **Content** tab of the space.

- Go to the space and click the **Content** tab.

You can filter the content by type to view, for example, discussions or documents.

## Sub-spaces

By default, sub-spaces inherit all of the content visibility permissions of their containing parent space.

- Go to the sub-space and click the **Content** tab.

You can filter the content by type to view, for example, discussions or documents.

## Projects

Projects inherit all of the content visibility permissions of their containing parent space or sub-space.

- Go to the project and click the **Content** tab.

You can filter the content by type to view, for example, discussions or documents.

## Content visibility options

You can limit to selected people the visibility of content that you create, or hide it completely from other people. Here is a reference of the visibility options of all content types.

### Content visibility reference

Here you can find details on who can see content items in various places in the community and which content types cannot be hidden.

#### Your personal content

##### Documents and uploaded documents

- **Description:** When you publish a document as **Hidden**, it is stored in your personal container and is private to you.
- **Are streams updated?:** You can see a stream update when you publish, but other users cannot.
- **To set the item as Personal:** Before you publish the document, set its visibility to **Hidden**. For more information, see [Creating documents for yourself](#) on page 84
- **To find the item later:** Go to **Content > Authored > Documents**, and then select **Filter by personal content**. The dark lock icon next to the document indicates it is limited to you.

##### External bookmarks

- **Description:** Your private bookmarks are stored in your personal container and are private to you.
- **Are streams updated?:** You can see a stream update when you save the bookmark, but other users cannot.
- **To set the item as Personal:** Go to  > **Bookmark** and paste in the external URL. Then, select **Make this bookmark private** and save it.
- **To find the item later:** Click the Spotlight search and select **Bookmarked > Show all bookmarks**. In the main navigation menu, filter by **External URL**. The dark lock icon next to the bookmark indicates it is limited to you.

##### Personal tasks

- **Description:** You can assign yourself personal tasks so that no one else can see them.
- **Are streams updated?:** You can see a stream update when you publish, but other users cannot.
- **To set the item as Personal:** Go to  > **Task** and select **Project > None (personal task)**.
- **To find the item later:** Go to **Actions > Tasks**. In the Project menu, select **Personal**.

#### Content limited to specific people

### Documents and uploaded documents

- **Description:** When you publish a document limited to **Specific People**, it is stored in your personal container and is private to you and the other people you designated.
- **Are streams updated?:** You and the other specified people see a stream update when you publish, but other users cannot.
- **To set the item as Personal:** Before you publish the document, set its visibility option to **Specific People**.
- **To find the item later:** Go to **Content > Authored > Documents** and then select **Filter by personal content**. The light lock icon next to the document indicates it is limited to you and the other people you designated.

### Discussions and Questions

- **Description:** When you publish a discussion or question limited to **Specific People**, it is stored in your personal container and is private to you and the other people you designated.
- **Are streams updated?:** You and the other specified people see a stream update when you publish, but other users cannot.
- **To set the item as Personal:** Before you post the discussion or question, set its visibility option to **Specific People**.
- **To find the item later:** Go to **Content > Authored > Discussions/Questions** and then select **Filter by personal content**. The light lock icon next to the item indicates it is limited to you and the other people you designated.

### Messages

- **Description:** You can send one or more other users a private message.
- **Are streams updated?:** Messages are listed in the Inbox. They do not appear in streams.
- **To set the item as Personal:** Go to  > **Message** and select the persons to whom you want to send the message.
- **To find the item later:** Go to **Inbox**. In the Filter drop-down menu, select **Messages**.

### Content that you cannot hide

- Blog posts.
- Discussions.
- Questions.
- Polls.
- Status Updates. However, you can limit your status update to a group if you want to limit its audience. For more information, see [Posting status update in groups](#) on page 62
- Projects.

## Setting up content visibility options

If you're concerned about privacy, you can limit who sees different parts of your profile by editing your privacy settings.

To limit profile visibility:

1. Go to **Your avatar > Edit Profile** .
2. Go to the **Privacy** tab.
3. For each profile field, select who can view it.

Your community administrator may control who sees certain fields, such as those without a **Visible to** option.

4. Take a look at how others can see your profile by using the **Preview your profile** option in the upper right corner of the page.
5. Click **Finished** to save the changes.

## Creating direct messages and private discussions

By using messages and private discussions, you can limit your audience to only the people you want.

Messages and private discussions show up in the Inbox of only the people you send them to. These are useful features, but the power of Jive is that nearly all topics in the community can be helpful to others, so try to keep things public whenever possible.

To send a message to someone, do one of the following:

- In your Inbox, click **Send Message**.
- Select  > **Message** .
- Click **Message** from the top of any of your attention streams.
- Hover over the person's name in any of your attention streams and click **Message**.

After your message is sent, the receiver can see it in their Inbox. From there, the receiver can respond directly.

To create a private discussion:

1. Click  > **Discussion** to create a discussion, then enter the title and details of the discussion.
2. Select **Specific People** under **Publish Location**.
3. Select the participants you want to include in the discussion.
4. When you're finished drafting the discussion, click **Post**.

Only the participants you selected can see a discussion notification in their Inbox. From there, they can respond to the discussion.

## Saving drafts

You can use the Save As Draft feature to quickly jot down and save your thoughts in documents or blog posts. Then, you can come back later to edit and publish your content. You can also collaborate with others on saved drafts before publishing them.

You can save blog posts and documents as drafts. This can be useful if you need time to finalize your thoughts before publishing something. Additionally, drafts are not visible in any streams.

### Creating and editing drafts

To save a blog post or a document as a draft:

1. Create and fill in a document or blog post.
2. Click **Save Draft**.

The document is saved as a draft and is not visible to anyone. You can find it on the **Drafts** tab of **Your Content**.

To edit a draft:

1. Go to **Your Avatar > Your Content** in the main navigation menu, and then click **Drafts** in the left sidebar to see your drafts.
2. If required, filter your Drafts results by documents or blog posts.
3. Click on the draft to edit the content.
4. Click **Publish** to save and publish the draft.

You can edit the content and save it again as a draft, or publish it.

### Collaborating on drafts

You can collaborate on drafts of blog posts or documents before you publish them or share an existing draft with other users.

To get people to collaborate on an existing draft:

1. Open the draft.
2. Click **Share** in the upper right corner of the page.
3. In the **Share** dialog box, select the people you want to share the post with and include a message for them.
4. Click **Share**.

The recipients are able to edit the draft and either save it as a draft or publish it.

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## Awarding badges and points

You can award other community members a badge to recognize their contributions, and even give them some of your status points.

If your community manager has enabled Jive Rewards, you can celebrate and thank other community members by awarding them badges, and optionally some of the status points you've earned yourself. Badges show up on the Rewards page, and the community member receives a notification that explains the reason.

To hand out a badge and optional points:

1. Go to **<your\_community\_url>/rewards**.

You can see the available badges at the top of the Badges tab.

2. Select a badge.
3. Start typing a person's name in **Give to**, and select their name. You can only give one person a badge at a time.
4. In **Add a personal message**, type a brief thank-you message, or explain why they're getting the badge.

For example, you could type "Thanks for answering so many customer questions!" This message is shown on the Rewards page and in the notification the user receives.

5. If you want to give points with the badge, move the points slider. Points are removed from your community total and added to theirs. Point levels affect leaderboards, but won't affect any missions that have already been earned.
6. Click **Give Badge**.

## Using Jive Apps

*Jive Apps are available in your community to help you get your work done faster and more effectively. For example, an app could help you and your team to arrange travel and schedules. An app could remind you to get up and stretch as you are working. An app could send a notification when your expenses have been approved.*

*Apps work within your community and can use its features directly as well as pull in third-party systems to bring additional functionality.*

## Overview of Jive Apps and app actions

You can use Jive Apps to accomplish focused tasks, integrate with other systems, or provide new functionality to your Jive experience.

Jive Apps are lightweight applications that are hosted by Jive or a third-party, which means you don't have to download anything to your computer and you are always looking at the latest version. When you install an app in Jive, you connect to it and enable it to access information that helps you work more effectively.

You can find Jive Apps when you click **Apps** at the top of your screen, where they always are when you're logged into the community. Some apps can bring in information from outside of your community, while others manage information within the community itself. You can also access some Jive Apps through extension points throughout the UI known as app actions.

Contact your Community Manager for acquiring additional Jive Apps.

### App actions

Apps can be used in other places beyond the **Apps** menu at the top of the screen. These additional app extension points are called *app actions*. An app action can appear in one of many different locations within the Jive UI: as a menu item in the **Create** menu (within the **Apps** section), in the sidebar when viewing a document (within the **App Actions** section), as a new tab in a group or project, when typing "!" while editing content. It is up to the Jive App developer exactly which of these extensions are accessible and exactly what action occurs when you select this action.

## Using apps in content

By using !App, you can bring links and images from a Jive App into your community so you can share them with others.

Similar to @mentions alert people and places, there's also a symbol you can use to invoke a Jive App from any discussion, blog post, document, or comment in Jive. Just type "!" and you see a list of installed apps.

When you create or comment on content in your community, you have the ability to !Apps. This is a way to share app artifacts with others. This enables you to generate a conversation about the app artifact or share it with people. If they don't have the app, they are invited to download it when they click the image or link.

To get content from a Jive App:

1. In the content editor, type the "!" symbol (or click the "!" icon if it is available).  
A search dialog opens and suggests possible matches.
2. Select the Jive App from the list and navigate to the image or content in the Jive App to produce a link.

## Troubleshooting and FAQs for Jive Apps

Here are answers to some specific questions about Jive Apps and how they work.

### **I have a problem with my app: what should I do?**

Jive Apps are supported by the developers who created them, just like apps you may have used on your smartphone or another mobile device. To get support for an app, select the App Settings button and select About. You'll be presented with a link to either the developer's support web site or a support email address.

### **I can no longer use my app: what happened?**

Sometimes apps become disabled when their data stream is interrupted, or when the app can't connect to the Internet. Your community administrator can also disable an app if she decides it's not appropriate for your community. Finally, for paid apps, billing issues like an expired credit card can result in the app getting temporarily disabled. If a paid app is disabled, we will no longer charge your credit card for app usage. In general, we try to give you detailed instructions on how to get your app started again. However, if you need some help troubleshooting, you should reach out to your community administrator.

### **I'm leaving my community: what happens to my information?**

If you leave your community, your credit card will automatically be disabled when your administrator turns off your access to the community. If you still see charges on your card please contact Jive directly at [app-billing@jivesoftware.com](mailto:app-billing@jivesoftware.com).

### **What happened to the Apps Market?**

You can now access Apps automatically when the Community Manager installs them into your community. However, if the Apps Market is enabled, you can also install apps from the marketplace. For additional documentation, refer to Apps Market information found in the [Jive 7.0 Community User Help](#). Contact your Community Manager for more information.

## Using external groups

You can use external groups to collaborate with users from outside your community.

When you create an external group, you can invite users from outside the community to work with community users. These groups usually serve a specific purpose, such as working on a project with a vendor. External contributors can see content only in groups they belong to.

The external contributor brings a fresh perspective and their expertise to an internal or employee community where you would usually suffer the pains of long email threads or time-consuming conference calls to get information from people outside your community. These users can provide quick answers, share files, and collaborate on documents.

## External groups overview

External groups provide an area where standard community users can work with people from outside the community, external contributors. Only secret or private groups can have external access.

You can use external groups to invite people from outside your community to collaborate with standard community users. For example, a user in a music label company's community could create a private group for a collaboration project they're working on. They could then enable external access to the group, invite the external artists who will be participating, and use the group to post schedules and communicate ideas. The external artists are limited to viewing and participating in this group only. They can't see anything else going on in the community.

Groups with external access are designated with visual cues such as either orange

**Externally Accessible** text or  the orange eye symbol that means people from outside your company are welcome in that group. You can find the following bright orange sign post at a group's home page.



## Creating external groups

When creating a group, you can select **Enable external access** to turn a community group into a place where standard users can invite external contributors to extend their communication and collaboration to the outside world.

For the details on group creation, see [Creating groups](#) on page 54.

To create a group with external access:

1. Click  > **Group** .
2. On the **Create group** page, enter the group name and details.
3. Select **Private** or **Private > Unlisted** for the group type.

External groups are limited to private and private unlisted groups to help protect community information.

4. Select **Externally Accessible** to allow external contributors to be invited to and join the group. Externally Accessible groups must be private or private unlisted . You may not see this option if it's not enabled for your community.
5. Click **Advanced** for more options.
6. Click **Create Group** .
7. If you see the **Invite People to Join** dialog box, then add a few users who you want to invite to the group, and click **Send Invitation**.

8. To manage group features and select the storage provider, select **Gear icon > Configure activity page** .

9. Click the gear icon in the Enabled Features and Content Types tile.

10. Select or clear features for the group.

People will be able to create content items of the types you select.

11. If available, you can select a storage provider for storing your uploaded files.

12. Click **Apply**.

13. Click **Save**.

The group is created and the user you invited can start using the group.

## Who are external contributors?

An external contributor can join a secret or private group when invited into the group by a group member. External contributors can view and participate only in that group. They cannot see any other community content or activity, and they can only join a maximum of 20 groups.

You can securely invite someone from outside your community to participate in an externally accessible group. The standard community user can only see external contributors when they belong to the same group.

	<b>Private: Unlisted group (Secret)</b>	<b>Private group</b>	<b>Public: Restricted group</b>	<b>Public group</b>
Can group members invite external contributors?	v*	v*		
What is visible to an external contributor who is not a group member?	None	None	None	None
Can external contributors see content?	Only a group member	Only a group member		
Can external contributors participate?	Only a group member	Only a group member		

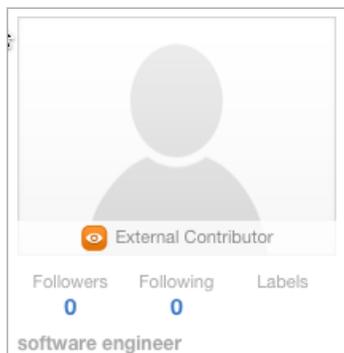
	Private: Unlisted group (Secret)	Private group	Public: Restricted group	Public group
Can external contributors invite new group members?	v*	v*		
Who approve secret and private group members?	Group administrator	Group administrator	n/a	n/a

\* Group administrators must approve invitations to private or private unlisted groups. Inviting an external contributor doesn't automatically grant access to a group. The external contributor has then to accept the invitation.

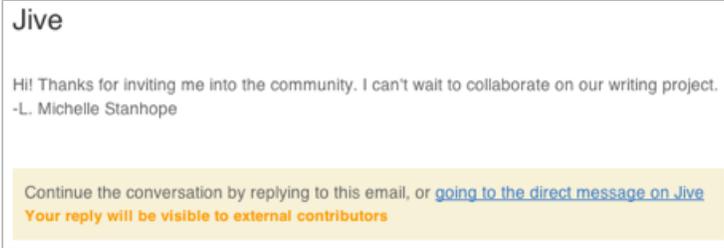
## Differentiating between external contributors and standard users

You can always tell the difference between standard community users and external contributors because external contributors have either an orange icon or orange text near their name.

Whether you are searching for users, browsing through community activity or looking at someone's profile card, you can spot the external access symbol that helps you identify external contributors.



An email notification also clearly indicates when you're replying to an external contributor.



## Inviting external contributors

When you belong to a group with external access, use the email addresses of users you want to invite from outside your community to participate.

To invite external contributors to join an external group:

1. Go to the group's main page.
2. Select **Actions** > **Invite members** .
3. Enter the email addresses of people you want to invite. To invite several people from your email address book, you can export a comma-, space-, or semicolon-separated list of addresses from the email application and paste them in.
4. Edit the message you want potential group members to see with their invitation.
5. Click **Send Invitation** .

## What can external contributors see?

External contributors can't see everything in the community because they are limited to the content in their groups and a few other restrictions.

External contributors can see:

- Groups they have joined
- Content and projects within those groups
- Other users who are also members of those groups

External contributors **cannot** see:

- Spaces or projects besides those in their groups
- Community Overview page found when you click **Home**
- Global or public content, such as status updates, public bookmarks, or public documents and discussions
- Apps, but they can see images embedded by apps within their groups

## What is unavailable to external contributors?

External contributors can use the community similarly to a standard user with the following exceptions:

- Update their status.
- Create public discussions and documents.
- See and work with private messages; only unauthorized messages are seen.
- See or use Jive Apps. External contributors cannot see or launch Apps or App Actions.
- Use Connects Services. External contributors also cannot see Connects Services in their user's Preferences page.
- See or use the Tools page, so they can't download modules like Outlook, Office, and Jive Anywhere.
- Access public external URL bookmarks or social bookmarking. External contributors can create and view internal bookmarks of Jive content.
- Become group owners.

## Contributing to community as external user

*A company may invite you to join one of their groups and become part of their online community so they can work closely with you, making you an external contributor.*

*Becoming an external contributor is a way to collaborate in a community on a limited basis. As an external user, you can view content and participate only in the group you belong to.*

Once you accept an invitation to join a community's external group, you can begin contributing to that group. For more information, see [How to begin contributing to community](#) on page 196.

## How to begin contributing to community

When you first join a community's external group as an external contributor, you can begin participating by accepting invitations, setting up your profile, and addressing your actions.

### Accepting group invitations

The first thing that you should do when you sign into the community is to accept any group invitations. You'll be doing all of your work in groups, so accepting invitations is how you can see group content and activity.

- Go to **Home > Actions** and then accept group invitations that you see under **Pending**.

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**Note:** You can only belong to a maximum of 20 groups, so choose wisely!

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## Setting up your profile

Your user profile provides community members with an easy way to learn about your skills and interests. Your profile shows up in search results when community members search for keywords contained in your profile. You can update your information at any time.

## Checking out your actions

When you are assigned something to do, such as a task or something that's been Marked for Action for you, you can see an alert next to Actions in the left sidebar. For more information, see [Using Marking feature](#) on page 149.

Use the following quick tips to use Actions effectively:

- Click **Action Items** to see a list of your Action Items. From here, you can Resolve them, or bring in other participants. To see the Action Items you have already resolved, click **Resolved**.
- Click **Tasks** to see a list of tasks assigned to you, which you can sort by project. To see the tasks you've completed, select **View: Include completed**. For more information, see [Using projects and tasks](#) on page 177.

## Customizing email notifications

You can take advantage of custom email notifications if you feel like you might miss something important when you're not signed in. For more information, see [Customizing notifications](#).

## Setting up your profile

Setting up your profile is the first step to participating in the community.

Your user profile provides community members with an easy way to learn about your skills and interests. Your profile shows up in search results when community members search for keywords contained in your profile. You can update your information at any time.

To set up your profile:

1. Go to **Your Avatar > Edit profile** in the upper right corner.
2. On the **Avatar** or **Photos** tab, change your avatar and manage your photos.  
Your avatar and other photos let people see and recognize you in person. Your avatar lets community members quickly associate your comments and status updates with a simple visual cue.
3. On the **Profile Details** tab, fill in as much profile information as you like.  
Note that your profile can be found when people search, so if you have professional roles or interests that would be useful for others to know about, you should include them. You may not be able to edit certain fields, such as username. Usually, the community manager sets up these fields for you.
4. On the **Privacy** tab, edit your privacy settings.

These control how different types of users see your profile. For more information on privacy settings, see [Setting up content visibility options](#).

5. Click **Finished**.

The profile is set up and becomes available in search.

## What else can external contributors do?

Jive is a place where you can build your network, come together as a team, share files, collaborate on documents, and get answers fast.

The group you belong to looks forward to hearing your ideas, and they need your expertise to get work done. Think of the group as a 24-hour hotline where you can communicate your concerns and give your opinion. You can write documents and get input from all the experts without taking notes or sifting through long email chains.

## Using your Inbox

Your Inbox shows the activity that's most you-centric – the information that's sent directly to you and has your name on it. This automatically includes @mentions, replies to discussions you're participating in, content people share with you, your latest acclaim, new follower notifications, and direct messages.

Use the following tips and tricks to get the most out of the Inbox:

- You can use the **Filter** menu in Inbox to sort the view to @mentions, messages, notifications, or shares.
- You can filter Inbox by participant by entering a user name in the box. You can see only the items that include this person as a participant.
- Manage your unread communications and follow-ups by using the blue dot next to messages you haven't read yet and clicking **Unread Only** to see only the messages marked with the blue dot.
- When you click the **Split View** icon in the top right of the Inbox stream and then select a message, you can see the content of the message in the lower pane and the list of messages in the upper pane.
- Get rid of activity on any item that no longer interests you by clicking **Hide new activity** in the lower pane of the split-pane view. The current activity stays in your Inbox, but you'll see no more update alerts for that item. For more information about notifications, see [Customizing notifications](#).

## Discovering documents and discussions (and other content), commenting and collaborating

Exchange ideas when you participate in discussions, questions, and documents:

- To comment on a content item, you should click **Add a Comment** or **Reply** at the bottom of a document, blog post, question, or discussion. You can reply to an individual message in a thread or the original post. Everyone reading the thread sees your response.
- Documents have owners who control whether you can change the content of the document, comment on it, or view it. You may be able to see documents that you don't have permission to comment on or participate in. If you think you should be

able to comment on a document and you can't, contact the author and ask for permission.

- If you can edit a document, you can see **Edit** near the **Actions** menu.
- A comment or a reply may have a badge showing Decision, Action Item, or Success. These badges help you avoid endless discussion and quickly determine the state or outcome of the conversation. For more information about marking, see [Using Marking feature](#) on page 149.
- Comments and replies may also be liked or marked as helpful. These are tallied for reporting activity in places or the entire community.
- A badge shows others how helpful someone has been to you. To give someone a badge, go to their profile page and click **Actions > Give Badge** .

### Using attention streams

You can see streams on the News page and the Activity page of any place. Streams are updated when someone creates a document, replies to a blog post, posts a status update, and so on.

### Objectives of external contributors

*As an external contributor, you are a crucial part of a community that needs your input. You may not be a community member, but someone in the community invited you because they knew you'd add value. The benefit of being an external contributor is that you only see the parts of the community that affect you. You don't have to worry about seeing anything you shouldn't.*

Your role is to help the community reach outside of its circle and to share knowledge, so that you and other group members can work together successfully and efficiently. You can feel free to ask questions in your groups and to post and comment on documents and discussions. When you become part of the conversation, you improve how work gets done.