

Managing Spaces

If you're a space or system administrator, use this guide to learn about how to create and configure spaces, including setting up defaults for content and managing discussions and documents.

Note: In Clearspace Community, a "space" is known as a "community," but you can think of the two terms as interchangeable.

Summary

- A space is a container for content such as documents, discussions, and blogs. A space can also contain projects, polls, tags, and announcements.
- You typically structure spaces in hierarchy, in which some spaces contain other spaces (also known as "sub-spaces"). The hierarchy tends to mirror the organizational context of people using the space.
- You can customize a space's overview page using widgets.
- People with system admin or space admin permissions can create spaces. They can also grant people access to space features related to content or administration features.
- By default, people with system or space admin permissions for a space have those same permissions for spaces inside it (sub-spaces).
- You can assign content moderation permissions to someone, giving them the ability to edit, delete, and move content as needed. You can also turn on content moderation so that new content must be approved.
- You can set defaults for discussions and archive discussions.
- You can make discussions available for display on other web sites.

What Is a Space?

A space is a container for content such as documents, discussions, and blogs. A space can also contain projects (with tasks), polls, tags, and announcements. Typically, spaces are arranged in a hierarchy that reflects the organizational groups of people using Clearspace. For example, in a company the human resources department might have its own space, with sub-spaces for content related to benefits and recruiting.

The concept of a space is essential in Clearspace because spaces provide the context for organizing content, sharing information, collaborating, and generally getting things done. A space can reflect and support the distinctive characteristics of how the group using it interacts with each other. That includes who has access to the space, what content is allowed there, and how the content is exposed.

People can reach spaces from the Browse menu (although they'll only be able to visit a space that they have permission to view). A space's All Content page lists content and sub-spaces the space contains and provides links through which people can create new content. In practice, though, you'll probably find that it makes sense to customize the space's overview page to suit the needs of group of people using the space.

Space Administrator's Role

As a space administrator, you have access to features for a space you're administering. You can log in to the admin console to view and change settings for that space, although you can make some of those changes in the regular Clearspace user interface.

The following table lists things space administrators can do with spaces, along with where you'll find the user interface for doing that task:

Task	Location
Creating sub-spaces (page 3)	Admin console Space Actions list
Configuring allowed content and locale (page 4)	Admin console
Setting discussion defaults (page 5)	Admin console
Setting document defaults (page 7)	Admin console
Archiving discussion threads (page 8)	Admin console
Exposing discussions on another site (page 8)	Admin console
Setting content permissions (page 9)	Admin console
Setting admin and moderation permissions (page 9)	Admin console
Managing discussions (page 10)	Admin console
Managing documents (page 10)	Admin console
Managing tag groups (page 10)	Admin console Space Actions list
Merging spaces (page 11)	Admin console
Customizing the space overview (page 4)	Space Overview tab

Note: To get to the admin console, go to a URL of the following form: `http://<hostname>:<portnumber>/<context>/admin`

Designing Space Hierarchies

One of the first things you'll likely do when setting up Clearspace is create spaces and sub-spaces in hierarchies that reflect your group's functional areas or interests.

You'll likely find that you're defining spaces and their sub-spaces in ways that reflect how people organize themselves outside of Clearspace. For example, at a high level, spaces could reflect organizational divisions. Sub-spaces are likely to reflect organizational subdivisions, but they could also mirror areas of interest or other more informal boundaries. For example, you might create a top-level Sales space to reflect the sales department, then create sub-spaces such as Channel Sales, Business Development, and Direct Sales. Other criteria by which to define sub-spaces include functional area and topic.

As you define spaces, keep in mind the following:

- Before adding spaces to the system, you might want to collect information about roles for those who will have special permissions — such as blog authors, moderators, and so on. As you create spaces and sub-spaces using the admin console, you'll be prompted for this information.
- Each space and sub-space can have different sets of permissions, so you can control access and capabilities within a space. You can also expose portions of the space to external partners using Clearspace's permissions system.
- When defining spaces and sub-spaces, be sure to that the divisions and hierarchy are intuitive to people. You might start by looking at how people and teams are organized. You could also create a suggested space/sub-space hierarchy and get user feedback on it.
- Create a general, high-level hierarchy to start at first. Once people are involved, they'll refine the categorization using tags. As a general rule, larger numbers of spaces and sub-spaces tend to create silos and reduce the power of tagging and tag groups.
- Define spaces with the role of tags in mind. Spaces organize content, but over time tags will grow to constitute virtual groups to organize content also. As people apply tags to content, for example, a tag such as "personal" might come to mean "a blog post or document that isn't connected with the company's business." In other words, this is probably a better way to categorize "personal" posts than a "Personal" sub-space would be.
- Note that content can't be shared and tagged between discrete spaces -- only within the space in which it's created. Use a space to group multiple concepts or functional areas; use a tag group to group together discrete concepts within a space.
- For usability reasons, avoid creating a large number of spaces. With a large number of spaces, certain elements in the user interface can become difficult to use. These include lists (including dropdown lists) that display the names of all the spaces.
- Content from a sub-space isn't found when searching the space that contains it, nor is the contained content listed on the All Content page. You can show content for each sub-space with a widget when you customize the space's Overview page. You can also use the Recent Activity widget to show recent activity for all sub-spaces.

Creating a New Space

You can create a new space from either the admin console or in the Clearspace user interface. Whichever way you begin, you'll use the same steps to create the space.

1. Start creating the space.

- In the admin console, go to **Spaces > Summary**, then click the name of the space that will contain the new space. Click **Create New Sub-Space**.
 - In the Clearspace user interface, go to the space that will contain the new space. In the **Actions** list, click **Create a sub-space**.
2. In **Step 1**, for a **Space Name**, enter the name you want to appear for the space in the user interface.
 3. Enter a description that will appear in the user interface, such as a brief description of what the space is for.
 4. For **Display Name**, enter the text that will be used in URLs that access reach the space.
 5. In **Step 2**, choose a default access scheme. Each of the options here represents a set of permissions that you'll be able to edit later you if you want.

For more information on what you get with each of the access schemes, see *Permission Defaults for New Spaces* in *Managing Permissions*.

6. In **Step 3**, select content types you want the space to support. People using the space will be able to see or create only those kinds of content you specify.
7. Select **Create Space Blog** if you want to make a blog that's associated with the space. Note that you won't be able to create a space blog after you're done creating the space.
8. Select **Aggregate other blogs** in order to have content for those blogs appear in the new space.
9. In the last step, review your choices (click **Previous** if you need to change any), then click **Finish**.

Customizing the Space Overview

Each space features an Overview tab that you can customize using widgets. As shown below, you can drag widgets into the overview design space to add views on content in the space — or even from elsewhere on the Internet. For more on widgets, see *Customizing Pages with Widgets*, included in the Clearspace documentation.

Configuring Spaces

Setting Space Name, Locale, and Allowed Content Types

You can change a space's name and description if the space's focus changes. You can also change the display name, which is the name used in URLs that link to the space.

For sub-spaces, you can also set which content types the space supports. For example, by clearing the Documents check box, you'll effectively remove the Create a document link from the space's Actions list. It also means that people won't be able to select that space when choosing where to put a new document they're creating using the New menu. Such a change also applies to existing content. So if people have created documents in the space, then you clear the Documents check box to remove support for them, existing documents will no longer be viewable in the space (although they'll still exist).

Admin Console: Spaces > Settings > Space Settings

Setting Discussion Defaults and Alerts

You can set up discussions with behavior that best suits the space and the people using it. The settings you can make include:

- Setting the **number of replies that can be marked as "helpful."** You might want to keep this number small if you feel that a large number of helpful responses might dilute the meaning of "helpful." Also, keep in mind that Clearspace is designed to award status points for helpful answers; you can increase the value of these points by keeping the number small. On the other hand, increasing the number could encourage people to respond more frequently if they think it's more likely their response will get marked as helpful.
- Specifying whether **new discussion threads should be marked as questions** by default. You might want to have them be questions if your space is intended as a place where people go for answers (such as a support-related space). Contrast this with a space where people go to make suggestions or merely share information.
- **Enabling email alerts for open questions.** Choose "Enabled" to have an email sent when a thread marked as a question has remained open (unanswered) for the period of time you specify. You might want to enable alerts if you want to make sure that questions get prompt responses. If you enable this, be sure to enter the recipient's email address. (Note that alert emails will be sent only if your Clearspace instance has been configured for sending email by a system administrator.)

Admin Console: Spaces > Settings > Discussion Settings

Setting Up Moderation

You can set up moderation so that the people who are moderators have the ability to approve or reject any content that's under moderation. Setting up moderation is a two-step process: granting moderation permission to people who'll be moderators and choosing which kinds of content should be moderated.

Granting Content Moderation Permission

You can grant content moderation permission at a sub-space or root space level. You should consider having more than one moderator doing moderation wherever you need it. Here's why:

- Content set for moderation will remain unpublished (and invisible to the community) until it is approved.
- The moderation queue for a given context (root space, sub-space, and so on) is visible only to those who are granted content moderator permissions for that context. It's not visible to moderators of other contexts, for example.
- Existing moderation requests can't be routed to another moderation queue (say, from a sub-space to the root space) after they've been queued. They remain in the queue until they're resolved.
- People added as moderators in a given context won't see existing requests in that context's queue — only new requests. That means that requests need to be resolved by whoever was assigned as a moderator when the requests arrived.

You might see how having just one moderator can mean a bottleneck if that person becomes unavailable.

You do have a failsafe for *new* moderation requests, however. New requests are routed in the following order:

1. If content would be moderated at the sub-space level but there's no moderator there, it goes to the root space moderator's queue.

2. If content would be moderated at the root space level but there's no moderator there, it goes to the system administrator's queue.

This applies to new requests only. Existing requests won't be routed to the next queue up. Be sure to see the Content Moderation section of *Managing Permissions* for more on what happens if moderators are deleted from the system.

You grant moderation permission in the admin console at Spaces > Permissions > Admins & Moderators. For more on granting content moderation permission, see the Content Moderation section of *Managing Permissions*.

Choosing Content to Moderate

You choose content to moderate by using the admin console. *Where* you make those settings depends on *which* content you want moderated. For all, you choose types of content in the admin console at Spaces > Settings > Moderation Settings. But you'll choose a different scope by selecting the **change space** link on the Moderation Settings page.

For This Content	Choose This Scope in the Admin Console	Who Typically Moderates
Documents and discussions in a space or project	Sub-space containing the content or project	Sub-space moderators
Documents and discussions in social groups	Root space (for content in all social groups)	Root space moderators
Personal blog posts everywhere	Root space (for posts to all personal blogs)	Root space moderators
Blog posts specific to a space or project	Sub-space containing the blog or project	Sub-space moderators
Blog posts in a system blog	Root space (for posts to all system blogs)	Root space moderators
Announcements created at the root space	Root space (for global announcements)	Root space moderators
Announcements created in a sub-space or project	Sub-space in which the announcements will be created	Sub-space moderators
Private messages	Root space (for all private messages)	Root space moderators

Note About Space Blog and Personal Blog Content

Personal blog posts are moderated by the root space moderator; space blog posts are moderated by the space moderator.

Comments are moderated by either the designated moderator or the blog's owner (they'll both get requests for moderating comments). But comments and trackbacks are moderated only if the blog's owner sets up moderation for them. If they do, then comments and trackbacks will appear in moderation queues for both the owner and the root space moderator. The blog's owner can also moderate comments on their blog's Blog Management page.

Note About Social Group Content

Content in groups is moderated by the root space moderator. Unlike projects, social groups aren't "contained" by anything, so moderation requests are sent to the root space moderator's queue.

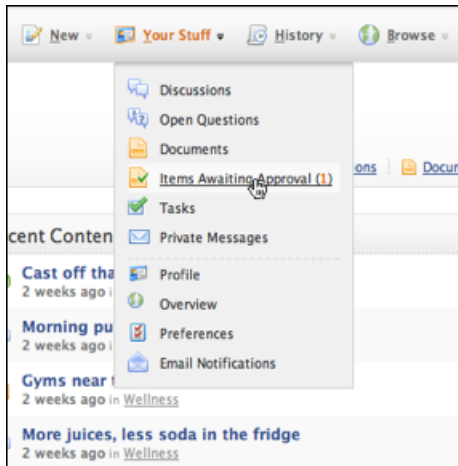
Content you can moderate in social groups includes documents, discussion threads (initial posts), and discussion messages (reply posts).

Setting a Space Approver

You can specify someone to approve all documents created in the space before they can be published and made visible to other people. With a space approver set, people will still be able to create new documents. Instead of being able to publish the document right away, however, they'll be able to "Submit for approval."

Here's how that process works:

1. Someone creates a document in the space.
2. Rather than being able to publish the document, the person will click a "Send for approval" button. Once they do, the document will go into an approval queue. The document isn't actually *sent* somewhere, but is marked for approval by Clearspace.
3. The space approver will know when something needs their attention by the highlighted color of their **Your Stuff** menu. The **Items Awaiting Approval** command will show the number of documents awaiting their approval, as shown here:



4. The link will take the approver to a Pending Approvals page on their profile. This page lists documents awaiting approval.
5. The approver can view the document, approve it, or decline approval. If they approve it (and if all other approvers approve it), it will be published. If they decline approval, they can enter an explanation for declining and the document will be sent back to the author as a draft. The author can edit and resubmit the document if they want to.

Note that a document can also have document-level approvers who've been designated through its Manage Collaboration page. All approvers must approve before a document is published.

Admin Console: Spaces > Settings > Document Settings

Setting Up Abuse Reporting

When abuse reporting is enabled, people will have access to a link through which they can report content as abusive. Content reported as abusive will be sent to a moderator's queue so that it can be evaluated. Abuse reporting is a system-wide setting — if it's enabled, it's on for every piece of content on which abuse can be reported.

For more on abuse reporting and moderation, see *Moderating Content*.

Admin Console: Spaces > Settings > Abuse Settings

Archiving Discussion Threads

You can "clean up" old discussion content by archiving it. When you turn archiving on for discussions in a space, you can specify how old a thread should be before it's archived and whether archived threads are deleted or moved to another space. For example, you could create a space that's expressly for the purpose of holding archived threads.

Admin Console: Spaces > Settings > Thread Archive Settings

Exposing Discussions On Another Site

You can expose certain discussions from your Clearspace instance through web pages that aren't part of Clearspace by using the Community Everywhere feature. For example, if you've got a web site that describes products offered by your company, you might want to expose discussions related to tips for using the products. Visitors to your product page would be able to view a link to discussions in Clearspace and optionally see recent posts as well as a box for adding a comment.

If you're wanting to encourage people to participate in your Clearspace instance, Community Everywhere can be a useful enticement. In the admin console, you can enable the feature, limit the sites that can use it, even generate the script code needed to add Community Everywhere links to web pages.

For more about Community Everywhere and how to set it up, see *Using Community Everywhere*.

Admin Console: Spaces > Settings > Community Everywhere

Fine-Tuning with Extended Properties

Extended properties are name/value pairs that configure particular aspects of a space. Many of these are tied to other settings in the admin console, so that changing the value in the console will change the value of the corresponding property. Generally speaking, you should leave properties unchanged unless you're asked to change it by Jive's support team. You might also change a system property value if the change is part of a larger effort to customize Clearspace.

Note: Names and values for system properties and extended properties are case sensitive.

Filtering and Formatting Content

Filters and macros both dynamically reformat the contents of messages, announcements and polls. Filters can be applied space-wide. They are similar concepts but filters can apply to the entire block of text and macros operate on a specific part (for example, {macro} will alter text in here{macro}). When editing the filters and macros for a

space, you first copy the global set of filters and macros that are in effect for your Clearspace instance. After you do that, you can separately turn components on or off as well as edit the settings for each.

Use filters. A filter dynamically formats message content before it posts to the space. Filters can be applied to discussions, document comments, and blog comments.

Apply a profanity filter. This filter automatically detects words in the profanity list and replaces them with ***. Use the list of common profanity terms from the Jive site as a starting point, then conduct a team-building exercise to augment this list. The profanity filter is the most commonly used filter; please consider using it.

Admin Console: Spaces > Settings > Filters and Macros

Managing User Access and Responsibilities

Use the Permission tab in the admin console to determine who has access to the space, and what they can do there. Permissions are divided into two categories: those governing what kinds of access people have to content in the space and those governing what access people have to administrative or moderation features.

Note that permissions are inherited by sub-spaces. So if you create a space inside a space, the new contained space will have the same permissions setup unless you change them.

If you expect that a space will be accessible to a well-defined group of people (such as those on a particular team), or that certain features will be limited to that group, then you might want to consider using (or creating) a user group. A user group is a way to group people's user accounts into a single group that you can then assign permissions for. It's easier than doing it for each person one at a time. A group admin creates user groups. See *Managing Users and Groups* for more information.

Setting Space Permissions

Space content permissions determine people's access with regard to what they can see and create in the space. This includes whether people can create documents, announcements, and polls -- even whether they can see the space at all.

For more information on setting these, check out *Managing Permissions*.

Admin Console: Spaces > Permissions > Space Permissions

Setting Admin and Moderation Permissions

Admin and moderation permissions determine what access a person has to administrative and moderation features. You can assign space administrators for the current space or its sub-spaces. You can also designate someone to be a content moderator.

See *Setting Admin and Moderator Permissions* in the *Managing Permissions* guide. For more on moderation, see *Moderating Content*.

Admin Console: Spaces > Permissions > Admins & Moderators

Managing Content in a Space

You have basic access to discussions and document in space from the admin console. A few of these features are also available in the Clearspace user interface.

Note that settings you make at the root level apply to all social groups. From the document- and discussion-management perspective, you can think of social groups as being contained at the root.

Managing Discussions

Content moderators also have the ability to edit and delete discussions, as well as make other changes. You can view a list of the discussions in the space, even edit or delete each. As a space administrator, you're also able to edit or delete discussions when you're viewing them in Clearspace.

For more on moderation, see *Moderating Content*.

Admin Console: Spaces > Management > Discussion Management

Managing Documents

You can view a list of the space's documents. From the list you can edit or delete each. As a space administrator, you're also able to edit or delete documents when you're viewing them in Clearspace.

Content moderators also have the ability to edit and delete documents, as well as make other changes. For more on moderation, see *Moderating Content*.

Admin Console: Spaces > Management > Document Management

Managing Tag Groups

By creating or editing tag groups, you can help ensure that content is organized in the best way for people using the space. Keep in mind as you work that the set of tags in space evolves in response to the way people use them.

Tagging is a way to apply keywords (of a sort) to content. When someone creates a new piece of content, they can apply tags that help capture what the content's about. Over time, as people apply the same tags to similar content, content is easier to find because it's grouped into a category represented by the tag. People can browse the tags to find content. (See the [Wikipedia definition of "tag"](#).)

Tag groups are a way to group tags so that all of the content associated with each of the tags is discoverable via the tag group. As a space administrator, you can create new tag groups in the admin console or from the space's overview in Clearspace. You edit existing groups in the admin console.

Here's a list of tag-related best practices to keep in mind:

- Encourage people to associate tags with content. This adds to the Clearspace search capability to making finding content even easier.
- Encourage people to use existing tags where possible. The Popular Tags list at the bottom of the document editing page lists these for the space in which the document has been created.

Admin Console: Spaces > Management > Tag Group Management

Merging Spaces

You can merge the content from one space into another space. You'll need to be a space administrator for both spaces in order to do this. Merging content moves all of the content into the destination space, mixing it with content that's already in the destination space.

Admin Console: Spaces > Management > Merge Spaces