

Managing the Community

jive

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Managing the Community

This guide includes information on creating and managing spaces, assigning permissions, and moderating content.

Making Simple UI Changes

Through a simple user interface, you can change the site-wide logo and colors. This guide describes the basic, point-and-click way to customize the site's user interface.

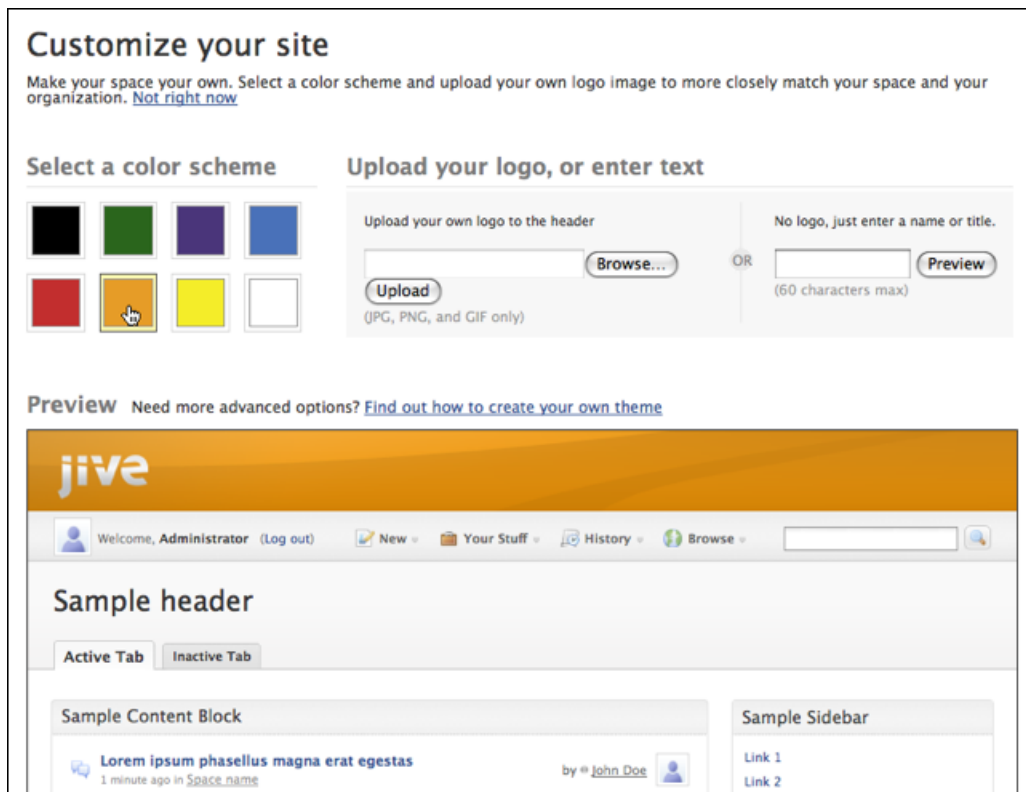
Note: To make the changes described here, you'll need administrator privileges. You'll need to be either a system admin or a space admin for the root space.

The basic changes you can make here are based on predefined schemes. If you're looking for a way to write your own themes and are ready to edit source code, be sure to read *Customizing the UI with the Theme Resource Kit* and *Advanced Theming Topics*.

Choosing Site Colors and Logo

To make Jive SBS a better fit for you, you'll likely want to change the color scheme and the logo that appear across the entire site. As an administrator, you can do this easily without logging into the admin console. Jive SBS offers a simple way in the user interface to make basic site-wide customizations.

1. In the end user UI, click **Your Stuff > Customize Your Site**.
2. On the **Customize your site** page, under **Select a color scheme**, click the color you want to use. As you click colors, you'll see the preview in the lower half of the page update to show how the site will look with the color you chose.



The UI in the preview is "real," even including a few links that navigate to other parts of the application. You probably want to keep the preview as it is, so try not to click the links.

Also, notice the link, **Find out how to create your own theme**. If you're not able to get the look you want on this page, you can click the link to reach a page with more advanced options. There, you can get started editing source code to create your own theme. For more information see *Customizing the UI with the Theme Resource Kit*.

3. To replace the default logo, either upload a new logo image or enter text that should appear in the logo's place. If you upload an image, be sure to use a JPG, PNG, or GIF file.

Using an image with a transparent background will help ensure a cleaner look, with the background color showing through. The background behind the logo is designed to adjust to the size of the image you apply.

4. Click the **Preview** button next to your selection in order to update the preview.

If you enter a name or title instead of a logo image, you can undo the preview by deleting the text from the box and clicking **Preview** again.

5. Click **Apply Design** when you're ready to keep the changes you've made. If you want to get rid of the changes and go back to where the site was before you started customizing, click **Discard**. To reset the site back to the defaults it had when you got it, click **Reset Defaults**.

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.

In This Section

- A space is a place 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.

Designing Space Hierarchies

One of the first things you'll likely do when setting up Jive SBS 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 Jive SBS. 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 Jive SBS'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.
- 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 category 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 and Arranging Spaces

You can create spaces in either the end user UI or the admin console. In the admin console, you can also arrange the space hierarchy.

In the UI: Admin Console: Spaces > Management > Summary

Arranging Spaces

You can view and arrange the list of spaces in the admin console. The Space Summary page lists spaces in the full hierarchy and provides a way to create spaces or edit their settings.

On the Space Summary page, on the Browse tab, notice that you can drag spaces up and down to reorder the list. Although you can't change where a space is in the hierarchy by dragging it, you can change that with the Move button, as described below.

When you've selected a space in the list, you'll see four buttons: New, Edit, Move, and Delete (except for the the root space, which you can't move or delete).

- Click New to create a new space inside (hierarchically) the space you've currently got selected.
- Click Edit to edit the space's properties (see [Setting Space Name, Locale, and Allowed Content Types](#) (page 7)).
- Click Move to start moving the selected space to another place in the hierarchy. There, on the Move Space page, click the name of the space you want the selected space to be inside, then click Move Space.
- Click Delete to delete the space and all the content inside it. Before the space is deleted, you'll get a warning with notes about what deletion means, along with with a summary the amount of content inside the space you're deleting.

Creating a New Space

You can create a new space from either the admin console or in the Jive SBS 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 **New**.

- In the user interface, go to the space that will contain the new space. In the **Actions** list, click **Create a sub-space**.
2. On the **Create New Space** page, 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 **Space Display Name**, enter the text that will be used in URLs that access the space.
 5. Under **Permissions**, choose a default access scheme. Each of the options here represents a set of permissions that you'll be able to edit later if you want.
 6. Under **Types of content...**, select content types you want the space to support. People using the space will be able to see or create only the content type you specify.
 7. Click **Create**.

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.

Tip: If you're customizing a space overview page and you've seen another layout you like, you can just copy it for your own use. Click **Copy another space** to copy that layout as your own. You can then rearrange to suit your needs.

Quick Steps

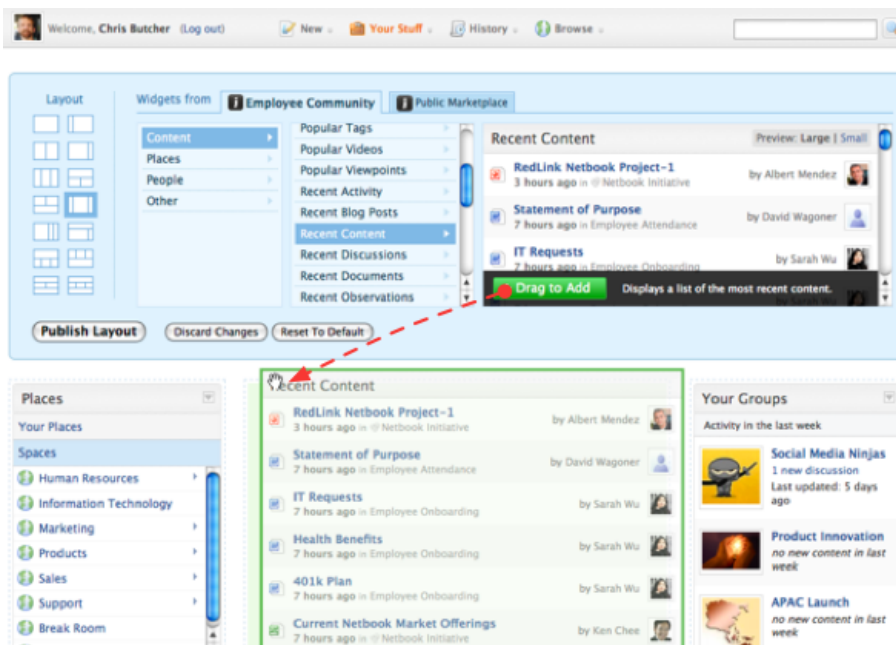
Here's the quick-and-easy look at designing a page with widgets.

1. To start customizing a page, go to the tab that will display your layout.
 - If you're personalizing the home page, this will be the **Your View** tab.
 - If you're customizing an overview page, this will be the **Overview** tab.

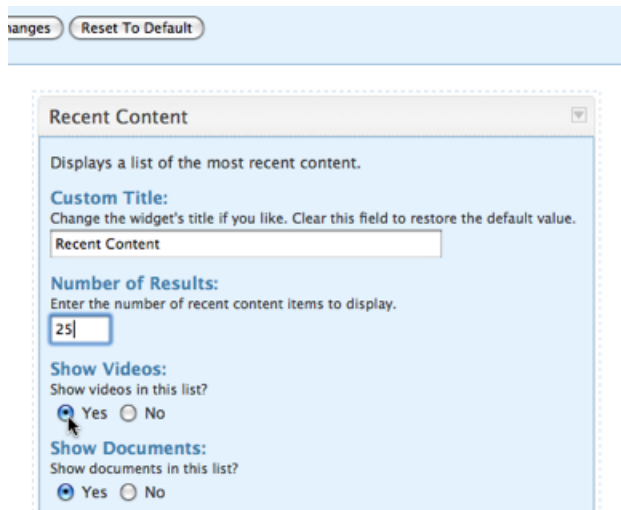
You'll get a layout screen with a set of widgets listed at the top and a default layout beneath it.

2. In the layout area beneath, find widgets you don't want displayed on the page and click their **Remove this widget** link (it's under the arrow in the widget's upper right corner).
3. In the widgets list above, find widgets you want and drag them onto the layout area.

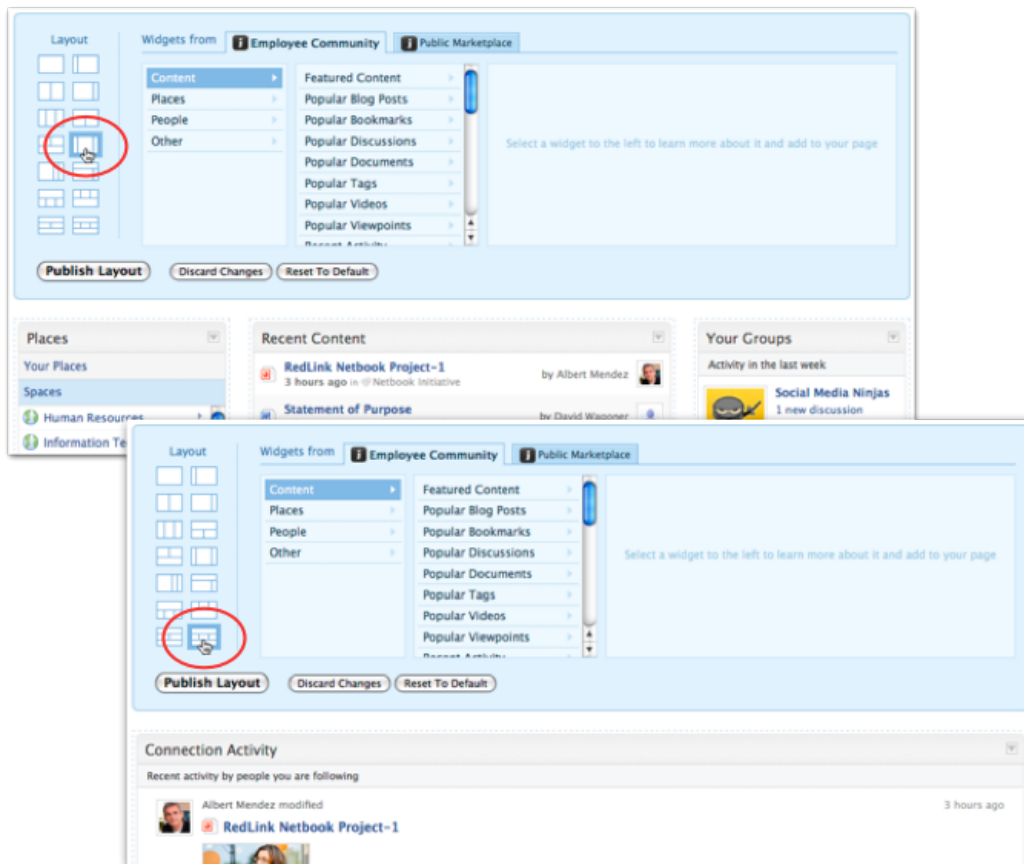
If you're connected to another community you're a member of, click the tab with that community's name to get a list of the widgets related to that community.



- Tailor a widget to your needs by clicking its **Edit this widget** link (it's under the little arrow in the widget's upper right corner).



- Click a layout to arrange your layout's columns.



- Repeat steps 2 through 5 until you have what you want, then click **Publish Layout**.

You'll probably spend a lot of time in your personalized page, but if you ever want to see the full view of content again, click the **All Content** tab.

Widgets Available

The following lists the widgets and the categories they belong to.

Space Overview

These widgets are available for administrators customizing a space's overview page.

Content		
Featured Content	Featured Video	Popular Blog Posts
Popular Bookmarks	Popular Discussions	Popular Documents
Popular Tags	Popular Videos	Recent Activity
Recent Blog Posts	Recent Content	Recent Discussions
Recent Documents	Recent Videos	Unanswered Questions
View Document	'	'

Places		
Projects	Spaces	'

People		
Recent Activity	Top Participants	'

Other		
Actions	Categories	Formatted Text
HTML	Latest Poll	Recent Bookmarks
RSS Subscription	'	'

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.

In the UI: Admin Console: Spaces > Settings > Space Settings

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).

Display name is the text displayed at the end of the space's URL in the browser's address bar. For some people, using the space's URL is a quick way to get to the space. (Note that you can't change the display name for the root space.)

Change the space's **locale** setting in order to set end user UI characteristics such as language, date format, and so on. Keep in mind that this locale setting applies to one of several locale scopes that can govern UI. For more on how the locale is chosen for display to the user, see *Locale Settings*.

Configuring Discussions for a Space

Within a space, you can configure discussion settings related to threads marked as questions. These settings govern how alerts should be sent for questions that remain unanswered.

In the UI: Admin Console: Spaces > Settings > Discussion Settings

Note: For application-wide discussion settings, be sure to see *Configuring Discussions Application-Wide*.

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. With this enabled, email will be sent to the people whose addresses you give in the **Email Addresses** box.

Specify an **open question age** value that makes sense for your community. If it's a very active community, you might want to make this shorter.

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. Having just one moderator can mean a bottleneck if that person becomes unavailable. 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 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 *Content Moderator* for more on what happens if moderators are deleted from the system.

You grant moderation permission in the admin console. For more on granting content moderation permission, see *Managing Space Permission Levels* and *Managing Space 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. You'll choose the scope you want by selecting the **change space** link on the Moderation Settings page.

In the UI: Admin Console: Spaces > Settings > Moderation Settings

For This Content	Choose This Scope in the Admin Console	Who Typically Moderates
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

For This Content	Choose This Scope in the Admin Console	Who Typically Moderates
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
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
Private messages	Root space (for all private messages)	Root space moderators
Videos in a space or project	Sub-space containing the content or project	Sub-space moderators
Videos in social groups	Root space (for all videos)	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."

You specify space approvers in the admin console as a setting for each space. For information on moderation, see [Moderating Content](#) (page 15) .

In the UI: Admin Console: Spaces > Settings > Document Settings

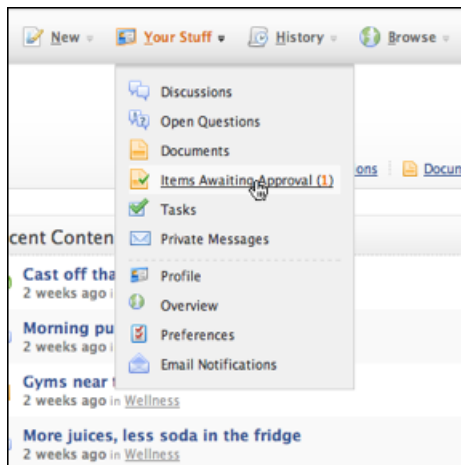
Setting Space Approvers

To set space approvers, type an approver's application username in the **Add User** box. You can also browse for users with the user picker. You can add more than one approver.

How Space Approval Works

Here's how the approval 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 the application.
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.

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.

In the UI: Admin Console: Spaces > Settings > Abuse Settings

For more on abuse reporting and moderation, see [Moderation Best Practices](#) (page 19) .

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.

In the UI: Admin Console: Spaces > Settings > Thread Archive Settings

Exposing Discussions on Another Site

You can expose certain discussions from your Jive SBS community through web pages that aren't part of Jive SBS 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 Jive SBS 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 Jive SBS community, 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](#) (page 11) .

In the UI: Admin Console: Spaces > Settings > Community Everywhere

Using Community Everywhere:

With Community Everywhere, you can embed discussion threads directly into existing news articles, blog posts or other content that would benefit from comments or discussions.

Instead of forcing users to leave your content to create a comment or view a discussion thread, you use Community Everywhere to enable users to log in or create an account and participate in discussions while on the page that contains your content.

This topic describes community everywhere, describing how you can set it up via the admin console and generate the script you'll use to embed access to discussions into your other content.

Community Everywhere embeds your discussion threads using JavaScript: first you enable Community Everywhere via the admin console, then you create a generate a unique key for each one of the articles you want to embed discussions on and finally you insert a JavaScript `<script>` tag into the pages that you want discussions to be shown.

Setting Up Community Everywhere:

Before you can use Community Everywhere, you must first enable it via the admin console.

In the UI: Spaces > Settings > Community Everywhere.

You can optionally choose to limit the sites that embed discussions by entering a comma-delimited list of referrers that should be allowed to embed discussions. Each of the referrer values must begin with `http://` or `https://`. You can also specify a user who will be used as the author of the threads that are generated by your content (note that users of your application will only be able to create replies / messages to threads which are generated automatically by Community Everywhere).

If you choose not to enable the Community Everywhere feature, the feature will display an error message stating that "Comments have been disabled by the system administrator." If a user attempts to use the Community Everywhere feature from a web site that you haven't explicitly allowed in the referrer list, the Community Everywhere feature will display an error message stating that "This site is not authorized to access the Community Everywhere feature."

Script Generator:

Once you have enabled the Community Everywhere feature, you use the Script Generator to create URLs that you can embed in your site. There are options for the amount of content you can show:

- **Display "Discuss This" Link:** Choosing this option will result in only a link back to your community to a thread created from this piece of content. If a user posts a reply message, the reply and any other messages will not be displayed with the content.
- **Display "Discuss This" Link and Recent Posts:** Choosing this option will show a link to your community to a thread created from this piece of content and will show the messages (if any) in the thread.
- **Display "Discuss This" Link, Recent Posts, and Comment Box:** Choosing this option will show a link to your community to a thread created from this piece of content, will show the messages (if any) in the thread and will show a comment box giving users the ability to create comments on the piece of content.

The Script Generator gives you four display options for the content generated from the choice you made about the content to display:

- **Number of Posts to show:** Enables you to choose the number of replies that will be displayed alongside your content. The default is to display all the replies. You can choose to limit the number of replies to five, ten, fifteen, twenty or twenty five replies.
- **Show Discussion Statistics:** Select this option to have Community Everywhere display the total number of replies and the date and time of the last reply. Sample: 2 message(s). Last at: Feb 28, 2007 12:48:36 PM
- **Open Link in New Window:** Select this option to have Community Everywhere force the opening of a new window when the user clicks on the "Discuss This" link.
- **Include Default Style (CSS):** Select this option to have Community Everywhere include style markup (via CSS) in the list of replies and comment box.

The Script Generator requires you to choose the space/community that you want the thread to be generated in and provides a button that gives you the ability to generate a unique key for each piece of content. After you've settled on all the options, you can copy and paste the text in the **Code** section of the admin console page into the HTML of the content that you want the Community Everywhere feature to be embedded in. See the **Usage** section below for more information.

Finally, the Community Everywhere feature gives you the ability to choose a custom title and description for the thread that is automatically generated by the system. You can do this by including two meta tags in the <head> of your document:

```
<meta name="jiveTitle" content="A discussion about Widget Foo"/>
<meta name="jiveDescription" content="Add your thoughts about the Widget Foo article below."/>
```

or by including a snippet of JavaScript code in your document:

```
<script language="JavaScript" type="text/javascript">
  var jiveTitle = "A discussion about Widget Foo";
  var jiveDescription = "Add your thoughts about the Widget Foo article below.";
</script>
```

Script Generator:

Once you have enabled the Community Everywhere feature, you use the Script Generator to create URLs that you can embed in your site. There are options for the amount of content you can show:

- **Display "Discuss This" Link:** Choosing this option will result in only a link back to your community to a thread created from this piece of content. If a user posts a reply message, the reply and any other messages will not be displayed with the content.
- **Display "Discuss This" Link and Recent Posts:** Choosing this option will show a link to your community to a thread created from this piece of content and will show the messages (if any) in the thread.
- **Display "Discuss This" Link, Recent Posts, and Comment Box:** Choosing this option will show a link to your community to a thread created from this piece of content, will show the messages (if any) in the thread and will show a comment box giving users the ability to create comments on the piece of content.

The Script Generator gives you four display options for the content generated from the choice you made about the content to display:

- **Number of Posts to show:** Enables you to choose the number of replies that will be displayed alongside your content. The default is to display all the replies. You can choose to limit the number of replies to five, ten, fifteen, twenty or twenty five replies.
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- **Open Link in New Window:** Select this option to have Community Everywhere force the opening of a new window when the user clicks on the "Discuss This" link.
- **Include Default Style (CSS):** Select this option to have Community Everywhere include style markup (via CSS) in the list of replies and comment box.

The Script Generator requires you to choose the space/community that you want the thread to be generated in and provides a button that gives you the ability to generate a unique key for each piece of content. After you've settled on all the options, you can copy and paste the text in the **Code** section of the admin console page into the HTML of the content that you want the Community Everywhere feature to be embedded in. See the **Usage** section below for more information.

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```
<meta name="jiveTitle" content="A discussion about Widget Foo"/>
<meta name="jiveDescription" content="Add your thoughts about the Widget Foo article below."/>
```

or by including a snippet of JavaScript code in your document:

```
<script language="JavaScript" type="text/javascript">
  var jiveTitle = "A discussion about Widget Foo";
  var jiveDescription = "Add your thoughts about the Widget Foo article below.";
</script>
```

Usage:

After you've completed the configuration steps mentioned above, you're ready to embed the Community Everywhere feature into your content. As described above, you can simply cut and paste the <script> tag in the text box into your page. As an example, let's say you had an article extolling the virtues of Widget Foo on your site:

```
<p>
  Widget Foo is the greatest tool on the planet. You should buy one now.
</p>
```

and you wanted to include a discussion form and replies below your content. You would go the admin console, enable Community Everywhere, choose the content and display options you wanted and click the "Generate New Key" button. You would then copy and paste the <script> tag into your content so that the end result would look something like this:

```
<p>
  Widget Foo is the greatest tool on the planet. You should buy one now.
</p>
<script language="JavaScript" type="text/javascript"
  src="http://our-community/everywhere/1801?community=2003&key=TGFu9V">
</script>
```

Fine-Tuning with Extended Properties

Extended properties are name/value pairs that configure particular aspects of a space. 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 Jive SBS.

In the UI: Admin Console: Spaces > Settings > Extended Properties

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

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 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 the community.

For more on moderation, see [Moderating Content](#) (page 15) .

In the UI: 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 the community.

Content moderators also have the ability to edit and delete documents, as well as make other changes. For more on moderation, see [Moderating Content](#) (page 15) .

In the UI: Admin Console: Spaces > Management > Document Management

Managing Categories

Categories are words or phrases through which people can add content to predefined groups. You define categories in a way that's specific to a particular place (a space or social group, for example). As you create categories, give thought to how the place's content should be grouped. You can optionally associate certain tags with the category. If you do, someone who uses those tags with content will see the category's name highlighted. This is a cue to consider assigning the content to the category.

By creating or editing categories, you can help ensure that content is organized in the best way for people using the space.

In the UI: Admin Console: Spaces > Management > Categories Management

To manage categories:

1. In the admin console, go to the **Categories Management** page.
2. To create a new category:
 - a. Click **Create New Category**.
 - b. Enter the new category's name and description.
 - c. Enter the tags that should be associated with this category. When people attempt to assign these tags, they'll be prompted to assign the associated category.
 - d. Click **Save**.
3. To edit an existing category:
 - a. Under **Categories**, locate the category you want to edit.
 - b. Click the category's edit icon.
 - c. Edit category properties as needed.
 - d. Click **Save**.

Merging Spaces

You can merge the content from one space into another space. This can be a useful way to remove spaces that are no longer needed *as spaces*, but whose content you still want to keep.

In the UI: Admin Console: Spaces > Management > Merge Spaces

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. The space you're merging from will be deleted as part of the merge.

Note: You can't merge the root space into another space.

To merge the content from one space into space:

1. In the admin console go to the Merge Spaces page. To get there, click the Spaces > Management tab. There, on the summary page, you'll need to select a space other than the root space (which can't be merged into another space).
2. In the list of spaces, click the name of the space you want to merge *from*.
3. Click Merge Spaces on the menu at the left. The Merge Space page displays a summary of content in the space you're merging.

4. On the Merge Space page, click the name of the space you're merging content *into*. This will begin the merge. The space you're merging from will be deleted as part of the merge.

Moderating Content

Someone assigned as a space's moderator can edit, approve or reject content before the content is published and visible to others.

In This Section

- Moderators review content and make decisions about its appearance to other people. This can include approving new content posts, editing or deleting content, moving it from one space to another, and deciding who can edit.
- Content that can be moderated includes discussions, documents, private messages, blog posts, and announcements.
- Moderators can moderate because they have access to content features that other people don't have. These features include links in the Actions list. A moderator also has access to a Pending Approvals page through a moderation link in their Your Stuff menu.
- A space approver isn't a moderator, but can do a kind of moderation because all documents in the space must be approved by them before being moderated or published for view by others.
- A system or space administrator designates someone as a moderator or space approver by assigning them the correct permissions in the admin console.
- A moderator's own content will show up in the moderation queue where moderation is enabled.
- Moderation settings aren't inherited. However, abuse reporting is a global setting that's inherited. Abuse reports are queued in the space moderator's moderation queue. If there's no moderator for that space, the report is queued at the root space level.
- A moderator for the root space moderates private messages, system and personal blog posts, and content in social groups.
- Blog post comments are moderated by the blog's owner.

What Is Content Moderation?

Moderation is essentially keeping an eye on content in a space — and taking action when it's needed — to help make sure that the content is appropriate. For example, if discussion posts in the space could become contentious, you might want to review them before they're visible to other people. The same could be true if content could contain sensitive information.

So what a content moderator includes the following:

- Approves or rejects content before it's visible to others. When moderation is on for content in a particular context, attempts to publish that content send the content to a moderation queue, where moderators can review it.
- Reviews abuse reports. When abuse reporting is on, people can click a Report Abuse link to tell moderators that a particular piece of content might be abusive. This could include content that has language inappropriate to the community.
- Acts on content as needed to adjust how content is available in the community.

Who Moderates What?

People assigned as moderators at the root space level moderate everything that doesn't have a containing space. They also moderate content from sub-spaces that don't have their own moderators assigned.

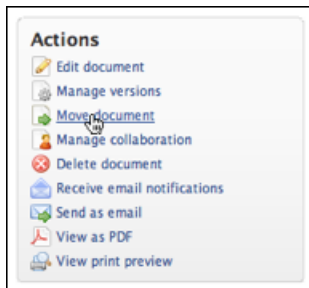
Moderated by Root Space Moderator (Content Without a Containing Space)	Moderated by Sub-Space Moderator (Content in Sub-Spaces)
All blog posts for system blogs and personal blogs.	Blog posts for the space blog.
All content in social groups, including documents, discussions, blog posts, and so on.	Documents in the space.

Moderated by Root Space Moderator (Content Without a Containing Space)	Moderated by Sub-Space Moderator (Content in Sub-Spaces)
Announcements in the root space.	Discussions in the space. You can moderate initial posts, reply posts, or both.
All private messages.	Announcements posted to the space.

Note: New user registrations can also be moderated. A user or group administrator moderates them, as described in *Moderating User Registration*.

Moderating a Single Piece of Content

As a moderator, you have access to a few commands for individual pieces of content that others don't have. Most of these commands show up as links in the Actions list (as shown in the following illustration); some appear on the content itself.



Here's a list of the kinds of things you can do, along with the kinds of content for which they're available.

Action	Content Type
Editing the content, such as to remove abusive language or sensitive information.	Discussion threads and replies, documents, and blog posts
Moving the content to another space.	Discussion threads, documents
Delete the content.	Discussion threads and replies, documents, and blog posts
Move the content to another space.	Discussion threads, documents
Branching the thread from a particular reply. When thread topics drift, you can branch the thread to create a new thread based on the "off topic" message.	Discussion threads and replies
Lock a discussion thread to prevent further posts.	Discussion threads
Manage collaboration for a document, deciding who should be able to edit it and whether someone must approve it.	Documents

What Happens When You Move Moderated Content?

An administrator enables moderation on a space by space basis. That means that it's possible that you'll find yourself in a situation where you're moving content between a context that's moderated and one that's not. Here are a few notes about what happens:

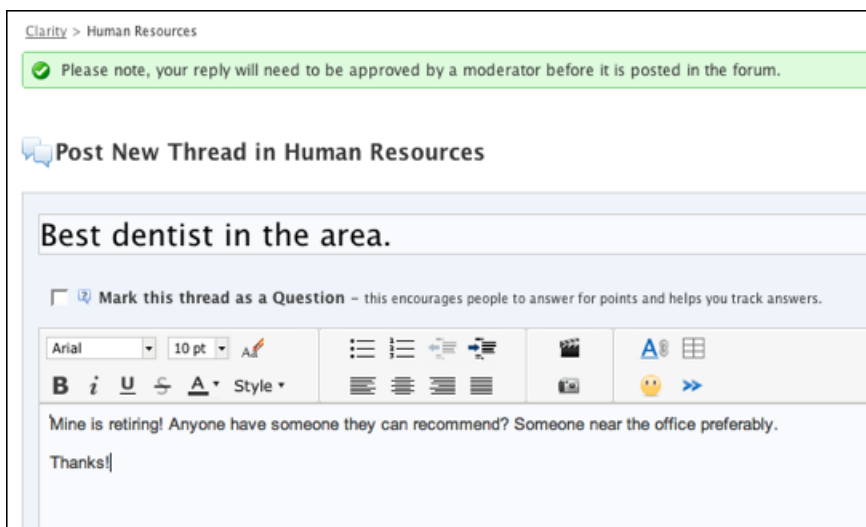
- If you move content from a social group to a space and both are moderated, unresolved posts continue to be moderated as group content. New posts are moderated as space content.
- If you move content from a moderated context to an unmoderated one, its posts will remain in moderator queues, but they will appear to people as if they were approved.

- If you move the content back into a moderated context from an unmoderated one, its content becomes visible (as if it has been approved) even though unresolved posts remain in their moderators' queues.

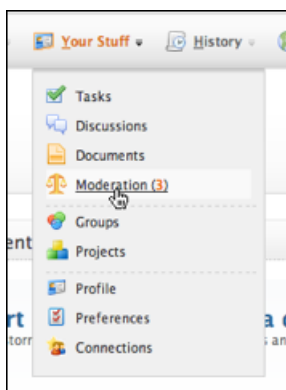
Reviewing Queued Moderation Requests

As a moderator, you'll have access to a list of requests for moderation. In contexts (spaces, social groups, and so on) where content is set for moderation, that content is sent to the moderation queue for approval before it's published for others to see.

For example, imagine that discussion threads are set for moderation in a space. When someone writes a discussion post, they'll see a message indicating that the content will need to be approved.



After they add the post, it will show up in moderation summary. You use the Moderation Summary page in Jive SBS to view the list of threads in the space that are waiting for moderation. You can reach that page by going to your profile (click **Your Stuff > Moderation**).



You'll see the list of items awaiting moderation as a **Moderation** tab on your profile. In the complete list you might have content reported for abuse and content awaiting moderation (either or both features might be enabled by an administrator). The following example shows a variety of items awaiting moderation.

Click the title to display editing options below

View or edit the content itself before approving or rejecting

Enter a note for other moderators

Filter pending items to make long lists easier to manage

Keyboard shortcuts save time by letting you quickly moderate messages without taking your hands off the keyboard to use the mouse. Use the up/down arrow keys to move between messages, S to show/hide the message body, A to accept and R to reject an item.

Notice at the right side of the page, you can filter the content listed, which can be handy when you've got a very long list. To moderate, simply take a look at each item and make a decision whether to:

- Approve the content, making it visible to other people using Jive SBS.
- Edit the content in context (you'll be taken to the content's editor, where where you can make changes).
- Reject the content, effectively removing it from the system.
- Leave a message for other moderators.

Note that comments on documents and blog posts aren't sent to the moderation queue. Instead, they're moderated by the content's author.

How Document Approval Fits Into Moderation

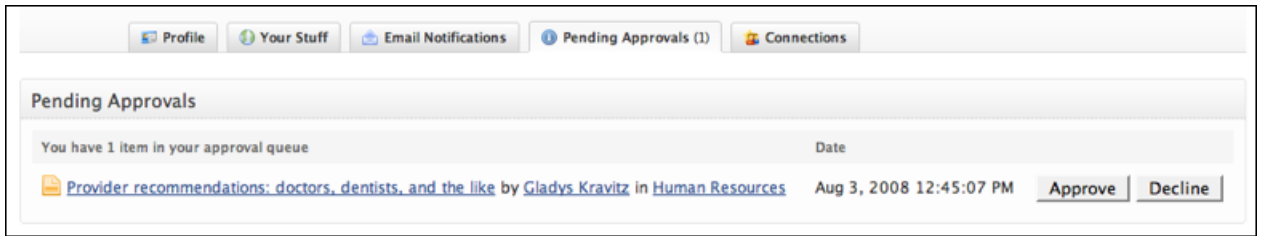
If an administrator assigns document approvers for a space, then they must approve the content before it even reaches the moderation queue. A space approver is like a moderator in the sense that their approval is required before the document can be published (they don't approve other kinds of content such as discussions or blog posts).

Here's how approval works:

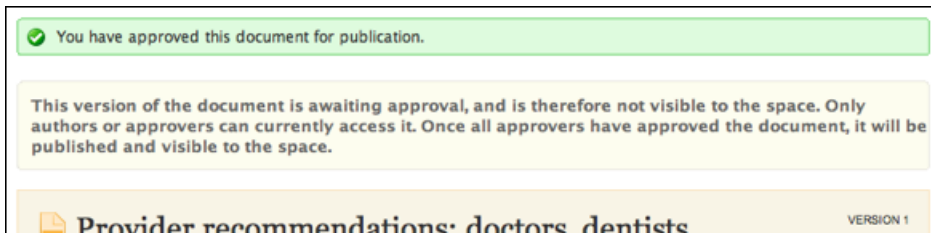
1. When someone has been assigned a space approver role, documents in the space are automatically submitted for approval before they can be published. If moderation is also enabled for documents in the space, then new documents must be approved before they're sent to the moderation queue.
2. After submitting a document for approval, the document page will display a status box showing the author a list of people who must approve. The author will also see the document listed on the **Your Stuff** tab of their profile as **Not Yet Approved**.



3. Approvers can reach their **Pending Approvals** list by clicking the menu **Your Stuff > Items Awaiting Approval**.



4. When an approver rejects a document, they're prompted to include a message to go with their rejection. That message is added to the document's **Author Discussion** area, where comments go under the document's content.
5. After someone rejects a document, it must be resubmitted (by anyone who can edit the document) for approval before it can be published.
6. If there are multiple approvers, all of them must approve a document before it can be published. When the last one approves the document, it is automatically published (or submitted for moderation if moderation is enabled).



Moderation Best Practices

As a moderator, you probably have more contact with more of the content than other people. You have an opportunity to talk with people who are posting content (or thinking about it). You can suggest guidelines that help keep the community humming along (and avoid problems that require a moderator's hand). Here are a few things you can do.

Try to moderate lightly — Instead, make the guidelines for discussions available and easily discoverable, then only moderate when a post is out of line or off topic.

Develop your usage policy — Design a usage policy to ward off abusive or inadvertent posts. Early warning can make a big difference, and can prevent people from having a negative experience. Make the consequences for unacceptable behavior clear. Some ideas for possible policy statements to include are:

- No profanity.
- Treat others with respect.
- Stay on topic.

When you enforce usage guidelines quickly and publicly (such as by removing or editing an offensive post), other community members are more likely to follow the guidelines.

Encourage people to report abuse — For discussions, Jive SBS includes a *report abuse* feature. When this is enabled (by a system administrator), a discussion thread includes a "Report Abuse" link in the Actions list and an "Abuse" link on each of the replies. When someone clicks an abuse link, the original post or reply is put into a moderation queue. A reported post can automatically be taken out of the thread when the number of users that report the post exceeds an administrator-specified number. The post is put into a moderation queue, and must receive moderator approval before it can be placed back into the thread.

Encourage people to mark replies as "Helpful" or "Correct" — This not only helps other people identify the content they need, but also identifies the responder as someone who might have useful answers.

Encourage people to tag content — Tags make content easier to find.

Understand the kinds of content that people use, and make suggestions where you think it might help — The following lists the main content types in Jive SBS, along with the roles moderators play.

	Document	Discussion	Blog Post
Description	People can type a text document using rich text formatting.	People can make suggestions and comments or ask questions that others can respond to.	People can post their views, observations, and analysis.
Use	Collect existing knowledge, document processes, create reports, best practices, and meeting notes.	Get feedback, report a problem, find a solution to a problem.	State an opinion, describe a solution, point to something interesting, ponder an idea.
Tone	Formal, third person.	Informal, first person.	Informal, first person.