

The Jive logo consists of the word "jive" in a lowercase, bold, sans-serif font. The letter "j" has a distinctive hook that extends downwards and to the left.

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Administering Jive Ideation

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Administering Jive Ideation

Getting Started with Jive Ideation

With the Jive Ideation module, your community can better manage the ideas that make a difference to the community and its work. This section describes how to configure and use Jive Ideation.

Getting Set Up

Getting up and running with Jive Ideas is pretty simple. This topic should get you started.

Installing the Plugin

Contact Account Support to obtain a license for enabling this feature, and then you can download Events plugin JAR file from [Jive Integrations in the Jive community](#).



Note: After you install the Ideation JAR, you'll need to restart Jive for the ideas feature to become available.

To install the Ideation JAR file:

1. In the Admin Console, go to **System > Plugins > Add Plugin**.
2. Under Install a New Plugin, click **Browse** to select and open the plugin JAR you downloaded.
3. Click **Upload** to add the plugin to your community.
4. Apply a deployment license that enables you to use the feature by going to **System > Management > License Information** in the admin console. For more about managing licenses, see "Managing the Deployment License" in the core Jive documentation.
5. Restart the application as root: `/etc/init.d/jive-application restart`.

Configuring Basic Settings

Here are a few things you might want to do:

- Enable the idea content type for places in which ideas should be created. Each kind of place -- space, group, and so on -- can specify what kinds of content are allowed in it. Before people start using ideas, administrators for those places should confirm that the Ideas content type is selected if they want to support new ideas in that place. You should also set the default for new spaces (see [Enabling Ideas By Default in Places](#)).
- If you've customized permissions for any spaces in which people can create ideas, be sure to take a look at how permissions for those spaces are configured. For example, if you've created overrides for particular users, granting or denying certain permissions for certain content types, then you'll want to make sure that permissions for the Ideas content type is what you want it to be. To do that, view permissions configuration for each space you might need to adjust.
- Define the list of stage options that should appear on each idea. See [Managing Idea Stages](#).

- Decide whether your ideas should provide custom fields to capture information about each that's relevant to your community. See [Managing Custom Fields](#).
- Set the number of points that votes are worth. You'll find more information at [Configuring Idea Point Scoring](#).

Enabling Ideas By Default in Places



Fastpath: Admin Console: Ideas > Idea Settings > Properties

You can set the ideas feature so that when a new place (such as a space, project, or group) is created, the ideas content type is enabled for the place. Ordinarily, when someone creates a new place, they can choose which content types can be created in the new place -- this setting turns that on by default for ideas. The person creating the place can still turn it off at that time.

Keep in mind that enabling ideas for spaces, or for a particular space, will also turn on permissions for ideas there. If permissions for a space have been customized, such as through user overrides that grant or deny particular permissions, you should take a look at permissions for the space to ensure that they are as you'd like them to be. For more information, see the permissions documentation on creating user overrides.

In the admin console on the Ideas Properties page, select the **Ideas enabled by default** check box, then click **Save**. You'll need to restart the Jive application for the changes to take effect.

Configuring Jive Ideas

Allowing Guest User Posting



Fastpath: Admin Console: Ideas > Idea Settings > General

You can allow community users to post ideas anonymously as a guest. Posting as a guest can be useful when people in the community might be influenced in their voting by knowing who is posting. With this enabled, new ideas will display a check box through which someone can post anonymously. You can also [hide the voting history](#) so that users don't know who voted or how they voted.

To allow guest user posts, go to the Idea Settings page in the admin console and select **Allow registered users to post as guest users**.

Hiding the Voting History for Ideas

As people vote on an idea, their names (and how they voted) will be added to a list of who voted. This list is displayed on the idea's page. You can configure ideas so that the list of names isn't displayed for each idea. You do this in the admin console.



Fastpath: Admin Console: Ideas > Idea Settings > Properties

To hide the list of who voted:

- In the admin console, on the **Properties** page for ideas, select the **Hide voting history**.

Configuring Idea Point Scoring



Fastpath: Admin Console: Ideas > Idea Settings > General

You can set the number of points that an idea vote is worth. Note that changing this setting after there are already ideas in the community will adjust scores for existing ideas.

To set the number of points:

- In the admin console, on the General page for configuring Ideas, enter the number of points that should be awarded for promoting or demoting an idea. Demoting an idea always removes the number of points you specify, so you don't need to add a minus sign to make it a negative number.

Managing Idea Stages

Stages let users know where an idea is in its development lifecycle. A brand new idea might be "Active," for example, while an idea that turned into something just released could be "Delivered." You can customize the stages for what works best for your community and its ideas. You can remove or rename the stages included by default, and configure how they appear to people in the community. You can also add your own stages.

In the community, administrators set stages by setting an idea's stage while editing the idea. You manage the available stage choices available from the admin console.



Fastpath: Admin Console: Ideas > Idea Settings > Manage Stages

The idea feature comes with a default set of stages you can use. The default stages include the following:

- Active
- Already Offered
- Archived
- Coming Soon
- Delivered
- For Future Consideration
- In Progress
- Partially Implemented
- Under Review

You can rename, delete, and reconfigure the default stages. For information on adding your stages, see [Adding an Idea Stage](#).

Configuring a Stage

You can define what a stage is called and how it appears to people in the community. You can also set which of the available stages should be the default, and which stages allow voting for ideas on which the stage is set.

Choosing the right background and text color for stage name display can help people in the community more easily scan lists of ideas to find the ideas they're looking for.



Fastpath: Admin Console: Ideas > Idea Settings > Manage Stages

To configure a stage:

1. In the admin console, on the Manage Stages page, find the stage you want to configure.
2. To set the stage as the default (it will be applied to new ideas), click the stage's button under Default.
3. To enable voting for an idea with a particular stage applied, select that stage's **Voting On** check box.
4. To set up how the stage should look in the community, click the stage's **Edit** icon.
5. On the Edit Stage page, enter values for the following:
 - Stage Name -- Enter the text that should appear in the dropdown where an administrator assigns the stage.
 - Background Color -- Click **Select color** to choose a color for the box that surrounds the stage's name in content lists.
 - Text Color -- Click **Select color** to choose a color for the stage name's text.
6. Click **Save**.

The Sample Text value shows what the stage name will look like in the community.

Enabling, Disabling, or Deleting a Stage

You can enable a stage when the community is ready to use it. Disable a stage when it shouldn't be visible to people in the community, or delete it when you know the community won't need it again.

Note that you can't disable or delete a stage that is currently in use by an idea. Before disabling or deleting the stage, you'll need to edit each of the ideas on which it's currently applied, selecting another stage for the idea. To see whether a stage is currently in use by ideas, take a look at the Ideas column on the Manage Stages page of the admin console. The value there tells how many ideas have that stage currently applied.



Fastpath: Admin Console: Ideas > Idea Settings > Manage Stages

To enable, disable, or delete a stage:

1. In the admin console, on the Manage Stages page, find the stage you care about.
2. Perform the action you want:
 - To enable or disable a stage, click the stage's icon under Disable/Enable.
 - To delete a stage, click the stage's icon under Delete.

Setting an Idea's Stage

If you're an administrator, you can set an idea's stage when you're editing the idea.

To set an idea's stage:

1. Navigate to the idea in the community.
2. At the top of the page, click **Edit**.
3. Under Stage, select the idea's new stage.
4. Click **Update**.

Adding an Idea Stage

You can add stages that capture your community's view of lifecycle phases.

You add new stages through the admin console. After you add the stage, you can configure it as described in [Managing Idea Stages](#).



Fastpath: Admin Console: Ideas > Idea Settings > Add Stage

To add a new stage:

1. In the admin console, on the Add Stage page, enter information as follows:
 - Stage Name -- Enter the text that should appear in the dropdown where an administrator assigns the stage.
 - Background Color -- Click **Select color** to choose a color for the box that surrounds the stage's name in content lists.
 - Text Color -- Click **Select color** to choose a color for the stage name's text.
2. Click **Save**.

The Sample Text value shows what the stage name will look like in the community.

Managing Custom Fields

Through custom fields, you can have ideas display fields that are customized for your community. For example, you could create a dropdown field that lists specific areas of interest to your community -- people would select the area to which their idea applies.

You add a custom field through the admin console.



Note: Deleting a custom field will remove from the system all data corresponding to that field (other aspects of the idea are unaffected).



Fastpath: Admin Console: Ideas > Idea Settings > Custom Fields

Field Types Available

A custom field can be one of several types. Choose a type that best suits the kind of information the field will capture. For example, if the field will contain the answer to a "yes or no" question, then you're probably better off using the Check box type (which people can select for "Yes") than a Text type (where people would type "Yes").

The field types you can choose include:

- Text -- A small box in which to type a brief amount of text.
- Text area -- A larger box for typing larger amounts of text. In this box, the text wraps and the box itself can be made larger or smaller by the person typing in it.
- Drop down -- A collapsible list of values from which a person can choose only one.
- Radio button -- A set of option buttons from which a person can choose only one.
- Check box -- One or more boxes from which a person can select any number.

Configuring Types With Multiple Options

Unlike the text types, the drop down, radio button, and check box types provide multiple selections, which can make them a little more complicated to set up. That's because for each of these types, you're often specifying a list of options that people in the community should see when they're editing the field in an idea.

Here are the basic steps:

1. While editing or adding a field, select one of those field types from the **Field Type** dropdown.
2. Under **Add options for this custom field**, click **Add Option** to add a new entry.
3. In the box provided, type the name of the option as it should be displayed in the community.
4. For each additional option you need, click **Add Option** and type its name.
5. When you have a complete list of options, find the one that should be the default field (applied for newly-created ideas), then click its **Default** button.
6. When you're done adding options, click **Save Field**.

Adding or Configuring a Custom Field

To configure a custom field:

1. In the admin console, on the **Custom Fields** page,
 - To work with an existing field, find the field you want to configure, then click its **Edit** icon. Below the list of fields, under **Edit custom field**, notice that the settings for the field you chose to edit are displayed.
 - To add a new field, under **Add new field**, simply start by typing the field's name.
2. Edit custom field settings to make the changes you want:
 - Field Name -- The field's name as it will be displayed in the community.

- **Field Type** -- The kind of field this should be -- a text box, a dropdown list, a set of radio button options, and so on. For information on configuring the types that display multiple options, see [Configuring Types with Multiple Options](#).
- **Required** -- Select this to require people in the community to give this field a value before they can save the idea.
- **Options** -- If you've chosen a field type that supports multiple options (such as radio buttons), you can configure the options here. For information on configuring the types that display multiple options, see [Configuring Types with Multiple Options](#).

Managing Jive Ideas

You can view a list of a space's ideas, from which you can edit or delete ideas. As a space owner, you're also able to edit or delete ideas when you're viewing them in the community.

Content moderators also have the ability to edit and delete ideas, as well as make other changes. End users are not able to delete ideas.



Fastpath: Admin Console: Spaces > Management > Idea Management

How do I import or export ideas?

If you're an administrator, you can import or export ideas between a place in the community and a spreadsheet program such as Microsoft Excel. You might want to export ideas to create charts from Excel, such as a pie chart that shows how ideas are distributed among stages). Importing ideas is a great way to add a batch of ideas from data you have in another form.

Exporting ideas

Exporting ideas will generate an Excel spreadsheet (.xls file) that's downloaded by your browser. Think of this as a one-way trip -- exported data can't be imported again in order to update the idea data it was exported from. Any data that's imported will create a new idea for each item imported.

The spreadsheet that's generated when you export will include the following information for each idea (most of which are pretty self-explanatory):

- **ID** -- the idea's unique ID in the application.
- **Title**
- **Description**
- **Score** -- the idea's score from voting.
- **Votes** -- the number of votes (in both directions).
- **Comments**
- **Watching** -- the number of people who are watching the idea via notifications.
- **Stage**
- **Author Name**

- Author Email
- Created Date
- Other fields -- if other fields are available for ideas, they'll be included in the report.

Community administrators can export all ideas from the community by clicking the triangle next to their name and then **Export ideas**. Owners of spaces, groups, or projects can export ideas from the spaces, groups, or projects that they own by going to the place and clicking **Manage > Export ideas**.

Importing ideas

Community administrators and owners of spaces, groups, and projects can import ideas to a community space from a spreadsheet or a database. You import the data as a comma-separated values (CSV) file, which you can easily generate from programs such as Microsoft Excel.

Of the data that you import, only three kinds of information will be used for the new ideas: each idea's title, description, and stage. The rest of the data in the CSV file will be ignored.

The CSV format should be as follows, with the names of the imported fields at the top. Only the following headers are valid: subject/title, body/description, and stage.

```
subject,body,stage
Idea 1,Idea 1 body,Active
Idea 2,Idea 2 body,Active
Idea 3,Idea 3 body,Active
```

Data that you import always creates a new community idea for each item in the CSV file. (For example, if you import a CSV made from a spreadsheet that you exported, you'll create duplicates of the ideas if they're still in the community.)

To import ideas:

1. Go to the place in the community where you want to import the ideas.
2. Click **Manage > Import ideas**.
3. Click **Browse**, select the CSV file, and then click **Open**.
4. Click **Upload File**.
5. Match the Title, Description, and Stage to the categories in your CSV file.

For example, you might have Subject, Notes, and Phase categories in the CSV file that you'd map as follows:

- Subject > Title
 - Notes > Description
 - Phase > Stage
6. Take a look at the example list of data beneath the mapping to ensure that the values there are what you want imported into that idea field.
 7. Click **Accept**.

If there aren't any errors in the imported data, new ideas will be created for the data you're importing. If there are errors in the data, you'll be prompted to either enter new data that fixes the error or simply clear the checkbox for that entry so that an idea isn't created from it.