Jv Jive Interactive Intranet

9.x Administrator Guide

Ideation

Aurea
Unlimited Possibility

Notices

For details, see the following topics:

- Notices
- Third-party acknowledgments

Notices

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Aurea global support

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

- Search the articles on the Aurea Knowledge Base for solutions to your issues.

- Search the product documentation and other product-related information that are also available on Support Central.

If you still cannot find a solution, open a ticket on Aurea Support Central. Information about the support organization is available on Support Portal as well.

You can also find the setup files on Support Portal.

For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our website.

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Jive Ideation overview

With Jive Ideation, community users can propose and vote on ideas. Community managers can configure how ideas are presented in the community, as well as manage the community's ideas in a variety of ways.

Ideation adds a new content type, Ideas, to Jive communities. You can see them on the main page and listed in the navigation menus. You can submit ideas and then vote on them. And votes are much easier to see and track than likes. Ideas also have stages, which you can customize to give your community insights into where ideas stand.

Jive Ideation empowers your community to share and collaborate on ideas.

For details, see the following topics:

- System requirements
- Supported browsers

System requirements

Here you can find system requirements for installing and using Jive Ideation.

Software requirements

Jive 9.0.0 or later.

Supported browsers

Jive works with most current web browsers. Note that if you need to use Content Editor features, such as cut and paste, script access to the clipboard must be enabled.

- Microsoft Edge* (Chromium-based).
- Apple Safari 8 and 9 (on Macs only).
- Mobile Safari on iPhone and iPad for iOS 8 and 9 and later. (For a browser-independent native iOS phone app, be sure to look for the Jive Daily Hosted app, if your community uses it, in the App Store.)
- Mobile Chrome on Android devices for Android 4.4 and later. (For a browser-independent native Android phone app, be sure to look for the Jive Daily Hosted app, if your community uses it, in Google Play.)

- Mozilla Firefox*.
- Google Chrome*.

* Google Chrome, Mozilla Firefox, and Microsoft Edge browsers are released frequently. Jive Software makes every effort to test and support the latest version.

Note: The recommended minimum screen resolution for desktop devices is 1024 x 768. Results may vary if you use zoom to adjust your view to levels other than 100%.

Important notes and restrictions

- Beta versions of web browsers are not supported, but they are quickly added to the supported list after they're formally released.
- Apps are not supported on mobile devices. These features may not work correctly on mobile devices.

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Administering Jive Ideation

Here you can find how to set up and configure Ideation for your community and how you can manage existing ideas.

For details, see the following topics:

- Setting up Jive Ideation
- Configuring Jive Ideation
- Managing ideas from Admin Console
- Importing and exporting ideas

Setting up Jive Ideation

The first step in setting up Ideation is installing the Ideation plugin if it is not already installed. And then you fine-tune Ideation setting for your community.

To set up Jive Ideation:

1. Verify whether the Ideation plugin is installed. In the Admin Console, go to **System** > **Plugins** > **Installed Plugins** and check if the idea-type-plugin plugin is present in the list.

   If you don't see the plugin, contact Support to obtain a license. Support can also help you find the appropriate plugin to download.

2. Install the plugin JAR file, as described in Installing Jive Ideation plugin on page 9.

3. Configure Jive Ideation as follows:

   a. Enable the Idea content type for new spaces, as described in Enabling Ideas by default in places on page 10.

      Each kind of place — space, group, or project — 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 enabled if they want to support new ideas in that place.

   b. If you've customized permissions for any spaces in which people can create ideas, review how permissions for those spaces are configured.

For example, you can create overrides for particular users, granting or denying specific permissions for certain content types. In this case, you also need to configure permissions for the Ideas content type. To do that, view permissions configuration for each space you might need to adjust.

For more information, see Managing space permissions in the Jive 9.x Community Manager Help.

c. Define the list of stage options that should appear on each idea, as described in Managing idea stages on page 12.

d. If required, provide custom fields to capture information about each that is relevant to your community, as described in Managing custom fields on page 14.

e. Set the number of points that votes are worth, as described in Configuring point scoring on page 11.

Installing Jive Ideation plugin

You can install the Jive Ideation plugin from the Plugins page of the Admin Console.

Fastpath: **Admin Console: System** > **Plugins** > **Add Plugin**

The Ideation plugin JAR file can be downloaded from the Jive Ideation Module page on Worx. You must also have a valid license to install the plugin.

Caution: After you add the Ideation JAR, you need to restart your Jive instance to make the plugin available.

To install the Jive Ideation plugin from the 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 file you downloaded.
3. Click **Upload** to add the plugin to your community.
4. Restart the application as root: `/etc/init.d/jive-application restart`.

Idea content type becomes available in the community.

Configuring Jive Ideation

Here you can find information on how you can configure ideas for your community.

Enabling Ideas by default in places

You can set the ideas feature so that when a new place is created, the ideas content type is enabled for the place.

Fastpath: **Admin Console: Ideas** > **Idea Settings** > **Properties**

Caution: After you enable ideas to places, you need to restart your Jive instance.

When someone creates a new place (that is space, group, or project), 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 — or editing — the place can still turn it off.

To enable Idea content type as default setting for places:

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **Properties** .

2. Select the **Ideas enabled by default** check box.

3. Click **Save**.

4. Restart the application as root: `/etc/init.d/jive-application restart`.

Allowing guest user posting

You can allow community users to post ideas anonymously as a guest.

Fastpath: **Admin Console: Ideas** > **Idea Settings** > **General**

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 setting enabled, users can post a new idea anonymously by selecting the **Create idea as a guest user** check box.

Also, you can hide the voting history so that users don't know who voted or how they voted. For more information, see

To allow guest user posts:

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **General** .

2. Under **Idea Creation**, select the **Allow registered users to post as guest users** check box.

3. Click **Save**.

Hiding voting history

You can hide the voting history to reduce the impact of the known history on new votes.

Fastpath: **Admin Console: Ideas** > **Idea Settings** > **Properties**

As people vote on an idea, their names (and how they voted) are 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.

To hide the list of who voted:

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

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **Properties** .

2. Under **Properties**, select the **Hide voting history** check box.

3. Click **Save**.

Configuring point scoring

You can set the number of points that an idea vote is worth.

Fastpath: **Admin Console: Ideas** > **Idea Settings** > **General**

Note that changing this setting after there are already ideas in the community adjusts scores for existing ideas.

To set the number of points for each vote:

• 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.

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **General** .

2. Under **Scenario**, in **Promoting an idea** and **Demoting an idea**, enter the number of points that should be awarded for promoting and demoting an idea.

3. Click **Save**.

Managing idea stages

Stages let users know where an idea is in its development lifecycle. You can customize the stages for what works best for your community and its ideas.

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

A brand new idea might be Active, for example, while an idea that turned into something just released could be Delivered. 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.

Default 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

Adding stages for ideas

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

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

To add a new stage:

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **Add Stage** .

   In **Sample Text**, you can see what the stage name will look like in the community.

2. In **Stage Name**, enter the stage name. It is the test visible to users when selecting stages for ideas.

3. In **Background Color**, specify the HEX color number or click **Select color** and choose a color for the box that surrounds the stage's name in content lists.

4. In **Text Color**, specify the HEX color number or click **Select color** to choose a color for the stage name's text.

5. Click **Save** to apply the changes.

A new stage is added to the community. If necessary, you can change its settings on the **Manage Stages** page. For more information, see Configuring stages on page 13 and Enabling, disabling, and deleting stages on page 14.

Configuring stages

You can define the stage name 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.

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

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.

For more information about adding stages, see Adding stages for ideas on page 12.

To configure a stage:

1. In the admin console, go to **Admin Console: Ideas** > **Idea Settings** > **Manage Stages** and find the stage you want to configure.

2. To set the stage as the default, click the stage's button in the **Default** column.

   This setting is applied to newly created ideas only.

3. To enable voting for an idea with a particular stage applied, select the check box for that stage in the **Voting On** column.

4. To set up how the stage should look in the community, click in the **Edit** column and specify the stage properties on the **Edit Stage** page.

   In **Sample Text**, you can see what the stage name will look like in the community.

   a) In **Stage Name**, enter the stage name. It is the test visible to users when selecting stages for ideas.
   b) In **Background Color**, specify the HEX color number or click **Select color** and choose a color for the box that surrounds the stage's name in content lists.
   c) In **Text Color**, specify the HEX color number or click **Select color** to choose a color for the stage name's text.
   d) Click **Save** to apply the changes.

Enabling, disabling, and deleting stages

You can enable a stage when the community is ready to use it or disable a stage when it shouldn't be visible. If a stage is not needed, you can delete it.

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

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 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, check the number the **Ideas** column on the Manage Stages page. The value there tells how many ideas have that stage currently applied.

To enable, disable, or delete a stage:

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **Manage Stages** .
2. Find the stage whose state you need to change.
3. To disable a stage, click   in the **Disable/Enable** column.

   A stage in use cannot be disabled. Check the number in the **Ideas** column to see how many ideas have that stage currently applied.

4. To enable the stage, click   in the **Disable/Enable** column.

5. To delete a stage, click   in the **Delete** column.

Setting idea's stage

You can change the stage of an idea when editing it.

Only the author of an idea, the owners and managers of the place the idea belong to, and the community managers can edit ideas.

To set an idea's stage:

1. Go to the idea in the community.
2. Click **Actions** > **Edit idea** .
3. Under **Stage**, select a stage for the idea.
4. Click **Publish**.

This moves the stage to the stage you selected.

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.

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

Note: Deleting a custom field removes all data corresponding to that field from the system. Other aspects of ideas are unaffected.

Available field types

A custom field can be one of several types. You should 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 using the Check box type (which people can select for "Yes") is more preferable than a Text type (where people would type "Yes").

The field types are available:

Text	A small box in which users can 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 user can choose only one.
Check box	One or more boxes from which a user can select any number.

Note that the Drop down, Radio button, and Check box types provide multiple selections. For each of these types, you can specify a list of options that people in the community should see when they're editing the field in an idea.

Adding custom fields

Adding a custom field for ideas in your community may help to get more information for ideas.

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

To configure a custom field:

1. In the Admin Console, go to **Ideas** > **Idea Settings** > **Custom Fields** .
2. Under **Add new field**, in **Field Name**, specify the name of the field as it must be displayed in the community.
3. In **Field Type**, select which kind of field this should be. If you selected one of the multiple-choice types (Drop down, Radio button, or Check box), specify the choices as follows:

For more information, see Managing custom fields on page 14.

    a) Click **Add Option** to add a new option and type the option title in the appeared box.

    b) Repeat Step Step 3.a on page 16 for all the options you want to add.

    c) Select the default option in the **Default?** column or click **Remove Default** to remove the default selection.

4. To make the field required, select the **Required** check box.

5. Click **Save Field**.

This adds the new field to your community ideas.

Managing ideas from Admin Console

You can access ideas from all community spaces from the Admin Console.

Fastpath: **Admin Console: Spaces** > **Management** > **Idea Management**

From the Admin Console, you can view a list of space ideas, from which you can edit or delete ideas. If you select the root space, you can view the ideas from all spaces. Besides, here you can restore ideas which were deleted from the User Interface or permanently remove them from your community.

Space owners can also edit or delete ideas when they are viewing them in the community.

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

Importing and exporting ideas

Jive Ideas can be imported or exported 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). And importing ideas is a great way to add a batch of ideas from data you have in another form.

Exporting ideas

Exporting ideas generates an Excel spreadsheet (.xls file) which is downloaded by your browser.

Note: Exported data can't be imported again in order to update the idea data it was exported from. Any data that's imported creates a new idea for each item imported.

XSL overview

The exported spreadsheet includes the following information for each idea:

- **ID**: The idea's unique ID in the application.
- **Title**: The title of the idea as seen on the interface.
- **Description**: The description of the idea as seen on the interface.
- **Score**: The idea score from voting. For more information, see Configuring point scoring on page 11.
- **Votes**: The number of votes (in both directions).
- **Comments**: Comments added to the idea by community users.
- **Watching**: The number of people who are watching the idea via notifications.
- **Stage**: The stage of the idea. For more information, see Managing idea stages on page 12.
- **Author Name**: The author of the idea.
- **Author Email**: The author's email.
- **Created Date**: The idea creation date.
- Other fields: If custom fields are available for ideas, they are included in the report. For more information, see Managing custom fields on page 14.

Exporting community ideas

To export all community ideas:

1. In the user interface, select **Your avatar** > **Export All Ideas** .

> **Note:** This option is available for community administrators.

2. Select which ideas you want to export by specifying the stage, score, and creation date range.
3. Click **Export** to export the ideas.

This exports the selected ideas from the community to an XSL file you can download to your computer.

Exporting place ideas

To export ideas from a place:

1. In the place, select **Manage** > **Export Ideas** .

> **Note:** This option is available for community administrators.

2. Select which ideas you want to export by specifying the stage, score, and creation date range.
3. Click **Export** to export the ideas.

This exports the selected place ideas to an XSL file you can download to your computer.

Importing ideas

Importing ideas into the community is possible from CSV files.

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 generate from programs, such as Microsoft Excel.

Data that you import always creates a new community idea for each item in the CSV file. Consequently, if you import a CSV made from a spreadsheet that you exported, you create duplicates of the ideas if they're still in the community. For more information about exporting ideas, see Exporting ideas on page 16.

CSV file structure

Only three fields are used for new ideas: title, description, and stage. The rest of the data in the CSV file is ignored.

The first line of the CSV files must include the following headers, separated by commas. The second and the following lines must each include fields of an idea for export, separated by commas.

For example, a CSV file for importing ideas may look like this:

```
subject,body,stage
The first idea,Idea 1 description,Active
The second idea,Idea 2 description,In Progress
The third idea,Idea 3 description,Coming soon
```

You can download an example CSV file here: ImportExample.csv.

Importing ideas

Before you start, you must prepare a CSV file with the ideas you want to import.

To import ideas:

1. Go to the place in the community where you want to import the ideas.
2. Click **Manage** > **Import Ideas** .
3. Under **Choose a CSV file to upload**, click **Browse**.
4. In the dialog box, select the prepared CSV file, and then click **Open**.
5. Click **Upload File**.
6. Match the **Title**, **Description**, and **Stage** to the categories in your CSV file.

   For example, you might have the `subject`, `body`, and `stage` categories in your CSV file. In this case, you need to map as follows:

   - **Title** > `subject`
   - **Description** > `body`
   - **Stage** > `stage`

7. Check at the example list of data beneath the mapping to ensure that the values there are what you want to be imported into the idea fields.

8. Click **Accept**.

9. On the **Import Ideas** page, check the ideas to be imported and clear the check boxes for the ones you don't want to import.

   You can also edit any of the ideas you import by clicking **Edit** next to the idea.

10. Click **Import Selected Ideas**.

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

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Using Jive Ideation

Here you can find information about using ideas in the community.

For details, see the following topics:

- Ideas in Jive
- Creating ideas
- Voting on ideas
- Idea stages
- Keeping track of ideas

Ideas in Jive

An idea is a type of content that you or others can create and vote on. If your community members vote positively, an idea gets more points; if they vote negatively, points are taken away.

Creating an idea is a lot like creating a document. You give your idea a title and then type in its description. As with documents, you can format the idea's content with the content editor. For more information about creating ideas, see Creating ideas on page 20.

Creating ideas

When you've got an idea to share with the community, you create it the same way you create other content.

To create an idea:

1. Click [pencil icon] > **Idea** .
2. In **Idea title**, specify the title of your idea.

   When you're typing, you might get a list of ideas with similar titles. This is a chance for you to avoid posting an idea that's already in the community. If you see something that looks similar, you should take a look at it before you save your idea.

3. Type your idea into the area under the title.

   You can use formatting just as you would for other content.

4. To attach the files you need, click **Attach**, select the file, and then click **Open** for each file you want to attach.

5. Enter any special information that may be required in your community.

6. Choose the location in the community where you want to put your idea.

   For example, you could put it in a space, group, or project related to the idea. Note that some places might not have the idea feature enabled.

7. If your community allows it, you can create your idea anonymously by select the **Create idea as guest user** check box.

   This is used to ensure that your name isn't associated with the idea in the community and don't affect other user voting.

8. Under **Tags**, specify the tags to make searching for the idea easier.

9. Under **Categories**, apply categories to make searching and keeping track of the idea easier.

10 If required, add more authors to the idea. Select **Advanced Options** > **Add authors** > **Allow specific people to edit this idea** , then select one or more users to be added as authors.

11 Click **Publish**.

The idea is created in the place you selected.

Voting on ideas

When you vote on an idea, the idea points are increased or decreased depending on your vote.

For example, a vote in favor of the idea (up arrow) could give it 5 points. And a vote against the idea (down arrow) could give it -5 points, that is, deduct 5 points. The point value is set up by your community administrator. You can vote up or down as many times as you want; your last vote is saved until you change it and your vote counts only once.

To vote on an idea:

• Click **Vote up** or **Vote down** below the idea's title.

Note that some stages may not support voting. For example, you may not be able to vote on an idea in the Delivered stage. This is determined by your community administrator.

Where to vote

You can vote on an idea from several locations:

• The Activity stream: Click **Show more** on the idea item to see the voting arrows.

• Your Inbox: Click on the idea item to see the voting arrows.

- The idea's page: Get there by clicking on an idea in the Activity stream or browsing for an idea and clicking on it (**Browse** > **Content: All** > **Ideas**).
- An Overview page of a place: The large versions of the Recent Ideas and Top Ideas widgets.

Voting and status points

As with other things you do in the community — creating content, responding to discussions, and so on, — your actions on ideas contribute points to your overall status points in the community. If you aren't familiar with your status points, you can view them on your profile page.

Depending on how your community is configured by your administrator, you may earn status points for the following:

- Creating ideas
- Commenting on ideas
- Voting on ideas

Typically, you earn more points for creating ideas and less for commenting or voting on them.

Idea stages

Stages are a quick way to see the current development state of an idea.

For example, an idea could be Active, Delivered, or In Progress. An idea's stage is assigned in the community by a system, space, or group administrator or owner.

Depending on how the community is set up, some stages may not support voting. For example, you may not be able to vote on an idea in the Delivered stage. This is determined by your community administrator.

Here are a few idea stage examples along with possible meanings:

- Active: The idea is actively being voted on.
- Delivered: The idea has been delivered to its intended audience.
- In Progress: The idea is being developed.

Your community's stages and meanings may be different.

Keeping track of ideas

For a quick overview of the community's ideas, you can use tools such as idea lists, widgets, and feeds.

Browsing ideas

- To see all of the ideas in your community, go to **Your avatar** > **Your Content** > **All** and select **Ideas**.
- To see a list of ideas in a specific place, go to the place **Content** tab, and then select **Ideas**.

Using idea widgets

Note: We do not recommend that you use widgets and widgetized Overview pages in your community. For more information, see Understanding pages in places in the Jive 9.x Community Manager Help.

You can consider using an ideas widget in any spaces, projects, or groups you own. The Top Ideas and Recent Ideas widgets make it easy for others to view lists of ideas and vote on them.

- The Top Ideas widget displays a list of the ideas that are getting the highest scores in the community.
- The Recent Ideas widget shows the ideas that were created most recently.

For more information about adding widgets, see Designing Overview pages for places in the Jive 9.x Community Manager Help.

Use feeds for ideas

As with other content in the community, you can get feeds (such as RSS feeds) for ideas. By subscribing to a feed of ideas in a particular project, for example, you get updated information whenever an idea in that project is updated.

You subscribe to feeds using an RSS reader. To subscribe to feeds for ideas:

1. Go to the **Content** tab for a place in the community and select **Ideas**.

2. At the bottom of the page, click **Get a feed of this content**.