sitrion

Sitrion Social

Version 5.5

Administration Guide

7/25/2017

About usage of the names "NewsGator" and "Sitrion"

With the change of change of company name from NewsGator to Sitrion, the products have also undergone a name change. "Sitrion Social" is a bundled SKU that refers to what were formerly called Social Sites, News Stream, Video Stream, Spotlight and Enrich. New customers can only purchase this bundled SKU. Existing customers can still purchase the capabilities individually. The Internal Communication and Innovation solutions and the Engagement Scorecard are separate purchases for all customers. Customers who had licensed the Idea Stream module continue to get updates to that portion of the software. For simplicity for existing customers, the historical names are used to referred to the portions of the software which are now part of Sitrion Social (e.g. Spotlight, News Stream, Video Stream).

Introduction

This Administration Guide covers procedures for both technical administrators and business administrators. For example, the beginning of this guide, which describes administration of core functionality begins with some sections aimed at technical administrators, including "Turning on and configuring diagnostic logging", "Managing the Sitrion Social platform and installation" and "Section-by-section description of the NewsGator Social Platform Management page", all describing administrative procedures to be done via SharePoint Central Administration. Most of the sections that immediately follow these, such as "Community Functionality", "Web Part Deployment", "Global Functionality", and "Event Generation Outside Communities", contain instructions aimed at business administrators, where the administrative activities are conducted primarily within the SharePoint portal's user interface. The administrative instructions for each of the optional modules follow these, with a similar mixture of descriptions of technical and business administrative tasks.

This Administration Guide is part of a set of documents for using and managing Sitrion Social, covering both the core product and all optional modules. The total set of documents that describe the use of the NewsGator products are:

Sitrion Social v5.5 Administration Guide

Sitrion Social v5.5 Planning and Installation Guide

Sitrion Social v5.5 User Guide with Web Part Summary

Sitrion Social v5.5 Release Notes.

☞ It may be helpful to refer to some of the other documents listed above for more information. In many sections of this Administration Guide, we added a pointer so you know which document to turn to.

Modules add functionality to the Sitrion Social core. In version 5.5, the modules are:

News Stream: News Stream enables organizations to select an unlimited number and variety of blogs, articles, Twitter streams and other feeds. Individuals can customize their streams so they only see stories that match their interests. The stories can appear in the personal activity stream, on the WebPages, desiktops, mobile devices, and in Sitrion Social communities.

Enrich: Enrich is a learning and knowledge sharing platform. It allows employees to share information and peer experiences.

Spotlight: Spotlight automates the discovery of experts within an organization. It also recognizes experts through the award of merit-based badges. Spotlight helps employees find mentors or authorities who can answer urgent questions.

Video Stream: With Video Stream, end-users can easily upload, store and stream videos from a browser or mobile interface.   Videos become social objects that can be browsed, liked, commented-on, and shared with others.   Video Stream natively supports a broad range of encoding and streaming formats with it's own storage and streaming infrastructure.   In lieu of using Video Stream's native architecture, third-party enterprise video solutions like Kontiki and Azure Media Services (and others on a custom basis) can be used for encoding, streaming and storage.   Videos from third-party systems can be embedded in the stream including YouTube, Vimeo, SlideShare, Kaltura, Qumu and others.

Solutions add functionality to the Sitrion Social core. In version 5.5, the solutions are:

Innovation: The Innovation Solution supports the crowdsourcing, vettting and implementation of ideas with a rich set of metrics to manage and assess the innovation process.

Internal Communications: The Internal Communications solution provides a rich set of features for targetting and measuring the effects of communications.

Turning on and configuring diagnostic logging
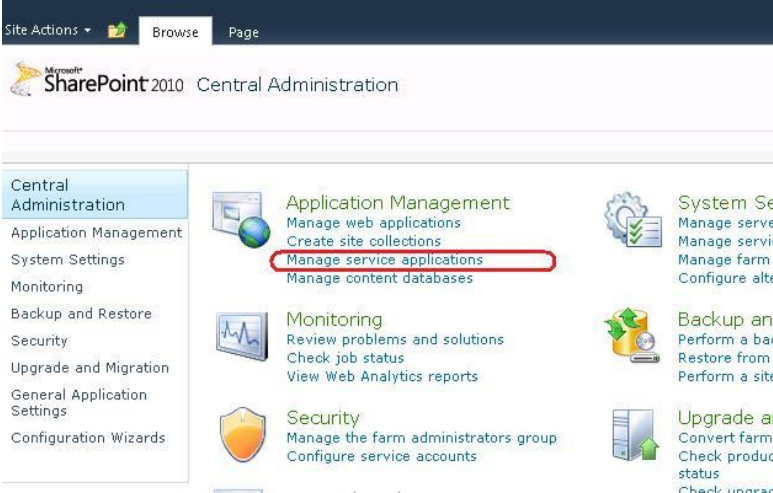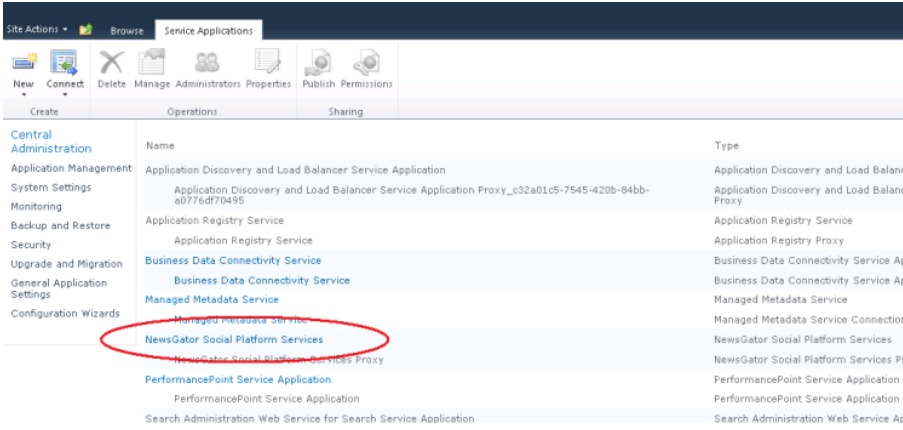
It is recommended to turn on diagnostic logging for Sitrion Social. For normal operation, it is recommended to set the logging level to "Warning"; for debugging, to "Information".

From Central Administration, click Monitoring, then Configure Diagnostic Logging. In the Event Throttling section, expand **NewsGator Social Sites** to see what the current logging levels are for Sitrion Social jobs and services. To change the levels, check **NewsGator Social Sites** (or the specific jobs and services underneath this that you want to change the logging levels for), then below this set the values you want for "Least critical event to report to the event log" and "Least critical event to report to the trace log".

Managing the Sitrion Social platform and installation

Apart from settings for any optional modules, much administration of Sitrion Social is centralized on a single page in SharePoint, the NewsGator Social Platform Management page. Turn to this page after install of Sitrion Social to check on the status of individual components of the installation, to troubleshoot problems with your installation, to reverse and/or reapply actions taken by the Sitrion Social installer, and to change the behavior of Sitrion Social.

Getting to the NewsGator Social Platform Management page

Action	Result
1. Open SharePoint Central Administration. 2. Under the **Application Management** area, click the **Manage Service Applications** link.	
3. Click on **NewsGator Social Platform Services**.	

This is the page you should see when you do the above:
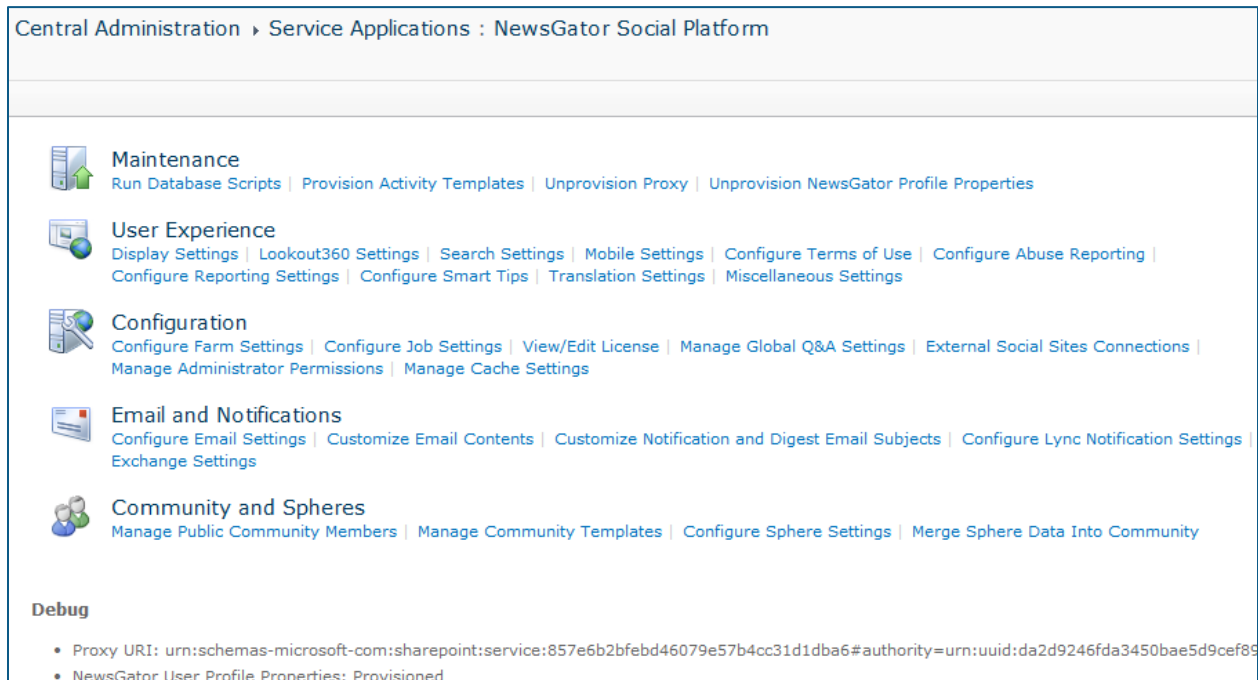
The top half of this page contains a collection of organized navigational links to pages with different administrative functions. None of these links takes an action.

The bottom half of this page contains information that can be useful when debugging system problems.

Configuring the behavior of Sitrion Social

You can adjust the length of time Sitrion Social keeps the data it records, using the Job Configuration section (refer to Job Configuration in the section-by-section breakdown below). In the Reporting Configuration section, you can block service accounts that are used as the author of activity stream items from appearing in aggregate reporting data. The Customize Email section lets you change the look of any of the emails that Sitrion Social automatically sends to users, and in the Miscellaneous Settings section you can turn on or off certain Sitrion Social behaviors.

Troubleshooting

Many sections on this page have some troubleshooting information to display. Just after completing a successful installation of Sitrion Social, everything on this page will show as provisioned or enabled, with the possible exception of the Email Handler, which is optional during install (not opting for it removes the ability to add to conversations by replying to conversation alert emails). If you find on this page any of these are not provisioned/enabled, you have the opportunity to reprovision on this page. You'll also see connection strings listed for the services database and report database in the Debug section, and also a report of a successful response from the backend proxy in the Debug section. Finally, you can check on the status of your license in the License Configuration section, to see if your organization's usage of Sitrion Social has exceeded your allotted number of users, or if your organization's license has passed its expiration date. More details on each of these areas are provided in the section-by-section breakdown below.

Repeating or undoing installation steps

Many parts of the NewsGator Social Platform management page allows you to repeat portions of the Sitrion Social installer without having to rerun the installer, and with a level of precision not afforded by the installer. In some cases you can also undo specific things the installer implemented. The License Configuration section gives you access to the

same settings you make on the License Key page of the installer, and that are applied during the Set License task on the Installing page. The Service Application Proxy section lets you repeat or undo the Provision Social Service Application Proxy task, that is done on the Installing page of the installer. The next few pages of this document, "Section by Section Description of the Newsgator Social Platform Management Plan", describe four sections.

What's described in Database Maintenance, Activity Templates, NewsGator user Profile Properties, and Email Handler allow you to repeat what is done in the Provision Social Service Application task, and in the latter three cases, undo a portion of it. These are selected on the Installation Option Selection page of the installer. More details on each of these are provided in the section-by-section breakdown below.

Section-by-Section Description of the NewsGator Social Platform Management Page

Maintenance section

Each of the links in the Maintenance section actually bring you to the same adminstrative page:

Upgrade Platform section

This is the same message that appears in red in the main management page as pictured above when there is a version discrepancy announced in red that needs to be resolved by clicking the Upgrade link to the right. Once resolved, this message will no longer appear. If you've deployed Sitrion Social using the Sitrion Social installer, you can expect to never see this section.

Service Application Proxy section
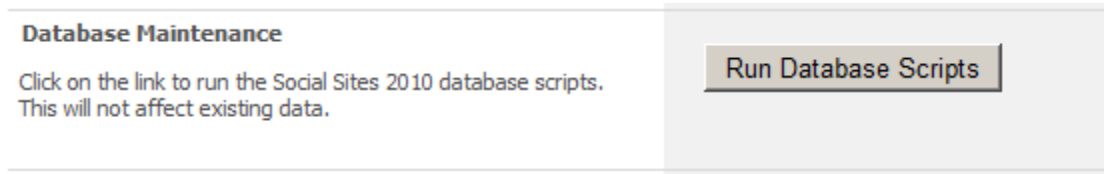
The Social Service Application Proxy is an essential component of Sitrion Social, without which SharePoint front-end servers cannot communicate with the NewsGator Social Service Application. It is initially provisioned during the Provision Social Service Application task in any install or upgrade of Sitrion Social.

If NewsGator web parts are displaying error messages where they should be displaying data, and/or if you see warnings in your SharePoint server's application event log referring to communication problems with the NewsGator Social

Service Application or the NewsGator Social Service Application Proxy, go to the Debug section of the NewsGator Social Platform management page (explained in detail below) and look for the "Debug from backend proxy" result. If it does not show a successful response, try reprovisioning the proxy by clicking the Provision button in this section. If successful, the Proxy URI should be displayed below the button, as pictured above.

If the Social Service Application Proxy is already provisioned, you will see an Unprovision button here, and the Proxy's URI will be displayed. While it is possible to create a configuration in which front-end to back-end communication occurs without this proxy provisioned, in supported Sitrion Social configurations this proxy is essential for that communication to occur, so it is not recommended to unprovision the proxy (unless you reprovision it shortly thereafter).

Database Maintenance section
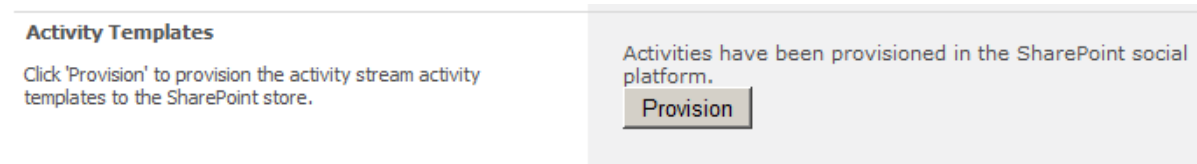
When you are installing or upgrading Sitrion Social, during the Provision Social Service Application task, scripts are run to create or update the database schema and stored procedures. If you are having problems with your Sitrion Social installation, and errors are showing in your event log such as stored procedures that are missing parameters, or columns not existing in certain tables, you'll want to try running your database scripts to fix these problems.

To rerun them, come to the Database Maintenance section and click the Run Database Scripts button. When the scripts have completed, you'll see the message "Database successfully upgraded" appear beneath this button.
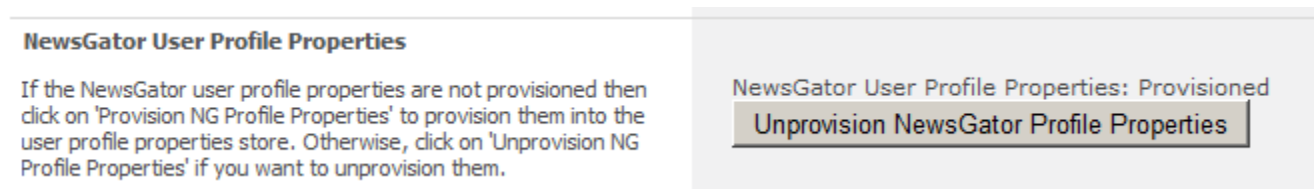
Activity Templates section

SharePoint 2010 provides users with an activity stream, which alerts users to the activity of other users in the system. SharePoint 2010 does not report on all types of user activity, however. Sitrion Social adds many additional types of activity to the SharePoint activity stream by provisioning activity templates to the SharePoint social platform. This is initially done during the Provision Social Service Application task in any install or upgrade of Sitrion Social.

If you believe that you are only seeing the standard SharePoint activity types in users' activity streams and none of the activity types added by Social Sites, come to this section of the NewsGator Social Platform management page. If properly provisioned, you should see a message like "Activities have been provisioned in the SharePoint social platform", as pictured above. Otherwise, click the Provision button to add these activity types.

NewsGator User Profile Properties section

Each SharePoint user has a profile in SharePoint containing information particular to that user. NewsGator adds properties to the standard SharePoint user profile to hold additional information to allow Sitrion Social to customize each user's experience. These properties are added during the Provision Social Service Application task in any install or upgrade of Sitrion Social. (In version 1.0, the only property added is a setting to allow or disallow notification emails.)

If NewsGator profile properties don't appear in SharePoint user profiles, come to this section of the NewsGator Social Platform management page and look at the status of the NewsGator User Profile Properties. If not provisioned, you should see a "Provision NG Profile Properties" button. Click it to add NewsGator properties to user profiles. The status should change to "Provisioned" if successful.

If you prefer not to expose the NewsGator-added settings and properties in SharePoint user profiles, you can remove them by clicking the "Remove NG Profile Properties" button in this section.

User Experience section

Display Settings page

Preferred Lookout URL

The Preferred Lookout URL setting is useful when there is more than one Lookout page set up in a particular SharePoint environment. When this is the case, it can be ambiguous which of these Lookout pages to access when the Lookout link is clicked in either the Lookout 360 bar or in the SharePoint 2013 Suite Link Bar. Enter here the URL of the instance of the Lookout page that your organization would like to be linked to.

Setting the color of the Lookout page

The Lookout page color can be specified on the Display Settings page:

Click on the Color box to see a selection of default colors:

To choose one of the eightteen preset colors, click the box displaying that color.

To use a preset as the base for a custom color, drag the mouse over it, then edit the text in the Hex text box. This takes a standard hex color code, so that the first pair of hex characters represents the level of red in the custom color; the second pair of hex characters represents the level of green; and the third pair represents the level of blue.

Edit the text to the desired value, then press ENTER to complete the color customization. Click **Save** at the bottom of the page to apply this color to the user interface. It can take a few minutes before this change can be seen in the UI.

Applying Lookout's "tile style" to all Sitrion Social web parts

Clicking the **Apply to Other Sitrion Social Web Parts** checkbox will both apply the selected color to other Sitrion Social web parts and enable a "tile style" for those web parts. This gives a consistent look and feel across all of Sitrion Social including the Lookout page. *Tile style is not supported for users with Internet Explorer 7. If your organization has Sitrion Social users for whom Internet Explorer 7 is the only browsing option, you should not enable this setting*.

Click **Save** at the bottom of the page to apply this look and color to the user interface. It can take a few minutes before this change can be seen in the UI.

Applying Lookout's "tile style" color to the SharePoint title bar

Clicking the **Apply to SharePoint Title Bar** checkbox will change the SharePoint title bar to the same selected color that is set to be used in Lookout. This option has been added to allow for more consistent and flexible branding. Click **Save** at the bottom of the page to apply this color to the user interface. It can take a few minutes before this change can be seen in the UI.
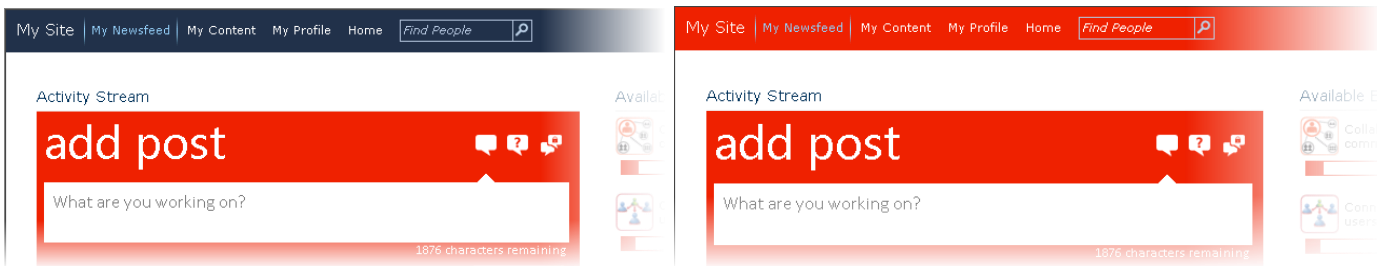
CSS and JavaScript Loading Control

On the same page, admins can choose to specify CSS and JavaScript they would like to load to make it easier to create consistent custom experiences across Sitrion Social web parts. The CSS and JavaScript files specified here load on any page containing NewsGator web parts, and load after NewsGator's CSS and JS, so that your customizations will supersede NewsGator's.

Controllable post length

The goal of this feature is to let companies set the default amount of text that should be displayed before the "show more" link is inserted. This allows companies who want to have the stream be more of a scanning experience to shorten the starting view of posts.

The setting for this is in the "Newsfeed Settings" section of the Display Settings page.

It's important to remember that many times @ targets can happen early in a post, so setting to very short display lengths (under 250 characters) is not recommended. In early testing, 300 – 500 characters worked well for many users.

Lookout360 Settings page

Lookout360 is a toolbar that is placed at the top of web pages to let users post, monitor and respond to stream items from any page. It has configuration to turn it on across a SharePoint farm via Central Admin, and it can also be implemented on other web pages (e.g. a legacy intranet site) via JavaScript. The goal is to provide users with the count of unviewed items from most of their tiles, an easy way to view the items from their tiles and respond to them,

and an easy way to post to the stream. Though the feature is called Lookout360, the displayed name can be changed in Central Admin. Below are a couple screenshots.
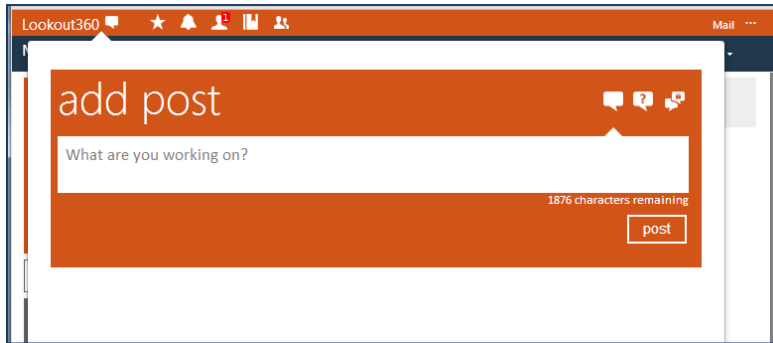
The first screenshot shows that users can create microblogs, questions and private messages from this control. The second screenshot shows that users can view counts from tiles they have configured in Lookout, see the items for those tiles, and respond to them.
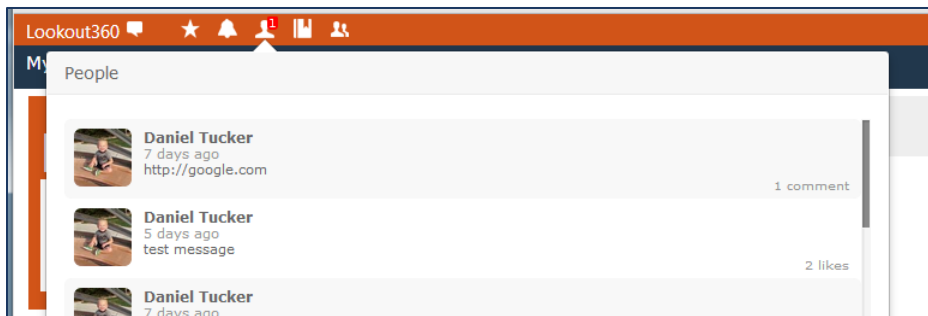
The toolbar also allows significant customization including choosing links to display and layout. The toolbar requires IE8 or higher (this is what allows it to work across multiple different web sites securely).

Lookout360 has extensive controls in Central Admin to configure it. All the settings are found in the "Lookout360 Settings" menu in the User Experience section of the NewsGator Social Platform service.
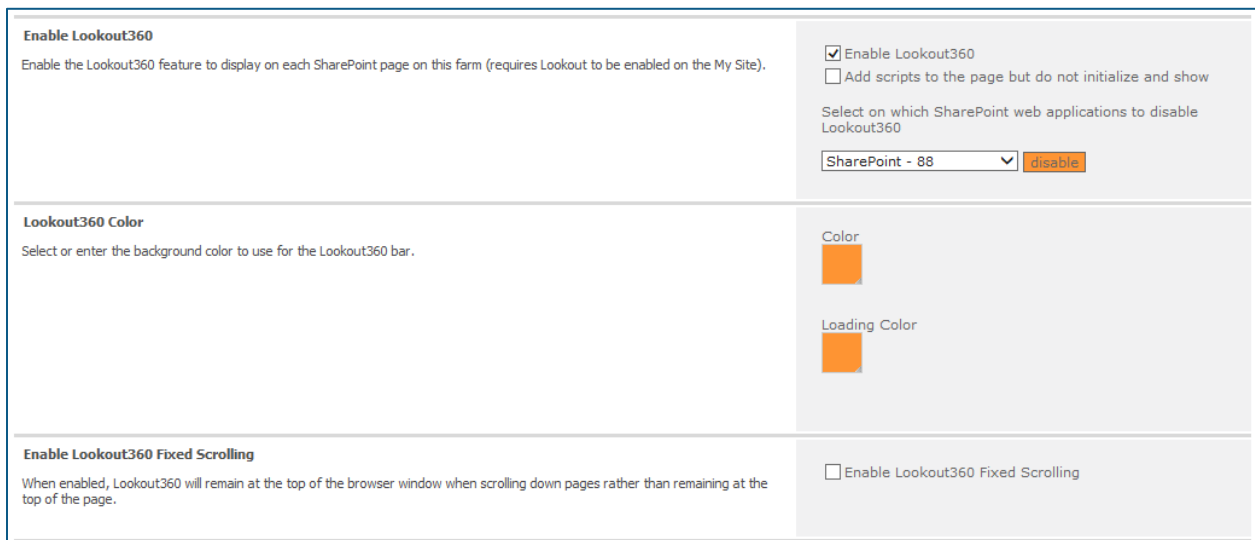
The first section of settings (**Enable Lookout360**) controls whether and where Lookout360 shows. The top setting, **Enable Lookout360**, turns on Lookout360 across your SharePoint farm. This will cause the toolbar to display on nearly every page (excluding some administrative and editing pages.)

The option **Add scripts to the page but do not initialize and show** is so that customers can more easily take advantage of the functionality in the Lookout 360 code for their own custom development (e.g. using just the Lookout360 search capability).

You can prevent the Lookout360 bar from appearing on certain web applications using the **Select on which web applications to disable Lookout360** dropdown.

The next section, **"Lookout360 Color"**, allows you to pick the background color that the Lookout360 bar will have while it is loading, and to pick a separate color for it to have after it has completed loading. Choosing a different loading color will give users a clear visual cue on when Lookout 360 has completed loading.

The color control allows picking from a few preset choices or entering a hex code for a specific color.

Below is an example of what users will see. In this example, green is selected for loading while orange is selected for display.
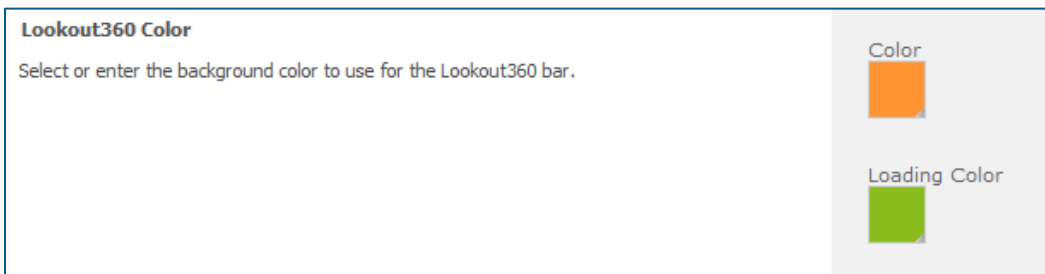
This results in a brief display of a green bar as the Lookout360 bar is loading at the top of a page.

This is quickly followed by the actual orange Lookout360 bar.

The **Enable Lookout360 Fixed Scrolling** setting keeps the Lookout360 toolbar on the screen, always visible to the user, regardless of whether the user has scrolled down the page or not. This fixed scrolling behavior can be helpful if you think users will frequently be scrolling down the page but still wanting access to the toolbar. Note that this setting is

really only important for deploying this to sites besides SharePoint – on SharePoint, this behavior happens automatically.

The next three controls allow specifying text to display for title and tooltips.

The next controls determine whether the post control displays, whether the search box is visible, the positioning of elements on the bar, and display of additional links within the bar.

Beginning in the 5.2 release, a new option has been added in the Lookout 360 settings in Central Admin. The Lookout360 Additional Navigation Links Display causes the additional links to show in column on click versus being laid out horizontally on the bar.

When the dropdown title is specified, the Lookout 360 bar now displays with a single title entry. Clicking this provides the user with a dropdown displaying all the specified navigation links.
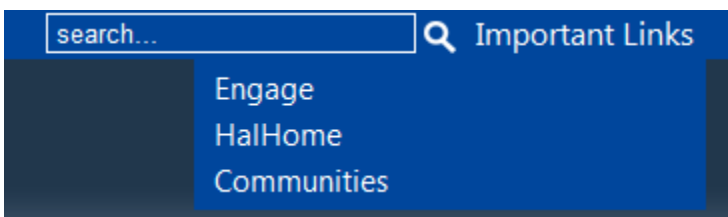
Note: The implemented behavior here is an on-click behavior to display the dropdown. If a customer wants an "on hover" behavior to show the dropdown list, it can be done with a simple javascrcipt/css customization.

The last two settings control how frequently the toolbar checks for updates (default is two minutes) and provide a way to localize the display name and the tooltips.

Search Settings page

Search in Lookout needs inputs to specify where the links in the search results take the user to find more content results or more people results.

Administrators also need to specify a search service application and search scope to be used.

Mobile Settings page

Click **Mobile Settings** to get to the Mobile Settings page where you can manage the behavior of mobile clients. These settings will impact the iPhone and Android clients, but not the Windows 8 or Windows Phone 8 clients.

There are two distinct kinds of mobile clients: native mobile clients (the type typically downloaded from an App Store), and the Lookout Mobile Web interface that is accessed via the browser on a smartphone. Most smartphones are able to use both types of client. Each type has its own section of settings on this page, described below.

Native Client Mobile Settings

The first section of settings applies to native mobile clients (the type typically downloaded from an App Store).
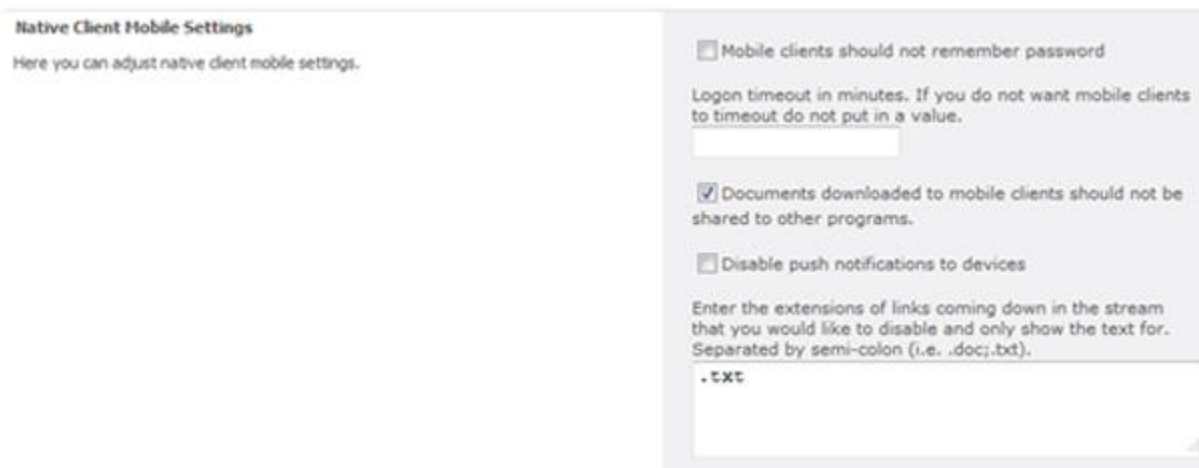
With "**Mobile clients should not remember password**" turned on, mobile clients are forced to forget the user's password. This means that users will need to re-enter the password each time they want to use the client. With this setting turned off, clients can store the user's password locally so that users won't need to re-enter their password.

With a number value in the "**Logon timeout in minutes**" box, client applications will be caused to log out after the number of minutes specified. When left blank, client applications will not be caused to time out.

Checking "**Documents downloaded to mobile clients should not be shared to other programs**" will limit abilities users have to work with or view downloaded files on their smartphones.

In iPhone/iOS, normally users can view a document from within the NewsGator client app, where they will also have an option to open it in another app. With this setting on, iOS users will only be able to view the documents they find in the stream from within the NewsGator client.

In Android, the NewsGator client app does not allow viewing of documents within the app, so they can only be viewed by opening in another program. With this setting on, Android users are therefore completely prevented from viewing the documents they find in the stream.

The checkbox to "**Disable push notifications to devices**" will stop those notifications which users choose to receive in Sitrion Social from also being pushed to the iPhone and Android clients. If left off, individual users will still have the opportunity to choose to disable push notifications to their client by changing a setting on their client application.

The "**Enter the extensions of links …**" file extension box allows administrators to specify which types of files should not be linked in the activity stream on the mobile phone. They do this by specifying the file extensions (such as .docx) of those types of files. This is another mechanism to limit users' abilities to interact with files stored on SharePoint. For files of one of the specified types, mobile client users will still see the file name in an activity stream item (for example, that someone just uploaded a new Word document), but there will be no link to that file (like you would see normally in such an activity stream item).

After making changes, click the **Save** button at the bottom of the page to put your changes into effect.

Lookout Mobile Settings

The two settings in the Lookout Mobile Settings section control a title and color of the top bar in the mobile-browser-based Lookout Mobile web interface. These do *not* affect the header color in any of the native client apps.

Lookout Mobile Settings
Here you can adjust lookout mobile settings.

Enter a title to be displayed in the header.
Hal Lookout

Select a color for the header. You may also enter a custom hex color.

The title setting is intended to give a simple branding experience to help users know this interface is part of their broader intranet / Sitrion Social deployment. For example, at NewsGator, the intranet is named "Hal", so here we use "Hal Lookout" as the title in the mobile browser.

The color option gives a simple way to make the header color match a standard color you use on your intranet.

After making changes, click the **Save** button at the bottom of the page to put your changes into effect.

Terms of Use Configuration page

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use | Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

You can require users to agree to your terms of use before they can make use of the Activity Stream web part. (Note: "terms of use" are sometimes alternately referred to as "terms and conditions". You may use the expressions interchangeably, but here they are referred to as "terms of use".) When terms of use are enabled and the user has not agreed to the most recent version in her language, the Activity Stream will display a message.

Activity Stream

⊗ You must accept the Terms of Use before using this Web Part.

Click here to read and accept the Terms of Use.

When the user clicks the link, the terms of use display in an overlay window. Accepting the terms enables Activity Stream functionality. Rejecting them keeps the message displayed.
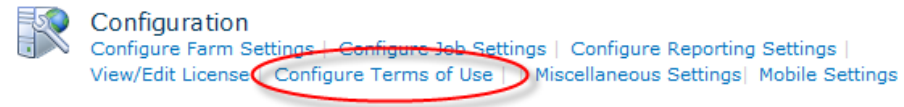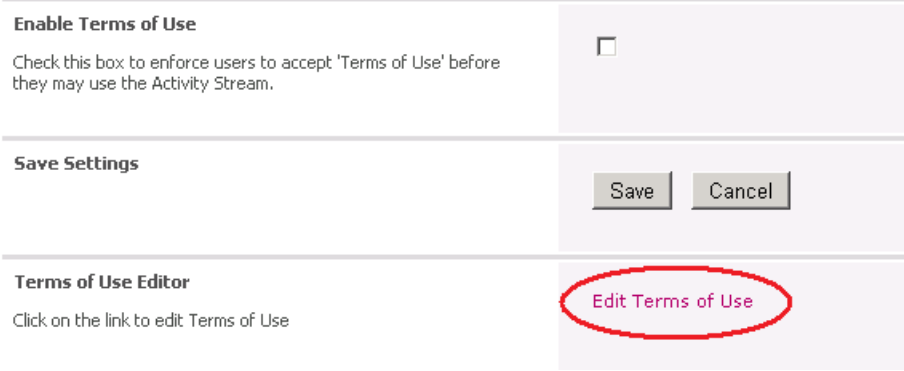
⚠ IMPORTANT: The terms of use shown by default in the application are for example purposes only. Consult your legal team to create your own terms of use, and put these in place before activating this feature.

This section will review the following procedures for activating and maintaining your own terms of use:

- Creating a new English – US version of your terms of use
- Creating terms of use in other English variants or non-English languages
- Activating the terms of use feature

Creating a new English – US version of your terms of use

When activated, the Terms of Use feature requires a US English version of the terms of use, as this is the version that will be used by default for users in all languages and cultures, for whom you have not provided a specific terms of use in their language. A US English version is provided out-of-the-box, but is intended only as an example. Consult your legal team to produce your own, and then replace the example version with your own by following the steps below.

Action	Result
1. From the Social Platform Management page, click **Configure Terms of Use**.	Configuration Configure Farm Settings | Configure Job Settings | Configure Reporting Settings | View/Edit License | Configure Terms of Use | Miscellaneous Settings | Mobile Settings
The Terms of Use configuration page appears. 2. In the **Terms of Use Editor** section, click on **Edit Terms of Use**.	**Enable Terms of Use** Check this box to enforce users to accept 'Terms of Use' before they may use the Activity Stream. **Save Settings** [Save] [Cancel] **Terms of Use Editor** Click on the link to edit Terms of Use — Edit Terms of Use
The Terms of Use version list appears. Out-of-the-box, this will contain only the en-US (English – United States) version. 3. Click **Edit** next to the en-US version of the Terms of Use.	This is a list of Terms of Use versions by culture. Click "Edit" to select a record for editing. To create a new Terms of Use record click here |	Culture	Version	Version Date (UTC):
---	---	---	---
Edit	en-US	1	9/20/2010 11:46:17 PM	
The page for viewing the selected terms of use appears. 4. Click the **Edit** link at the bottom.	Please review Terms of Use information below. To return to the list of Terms of Use click here Culture Info Name: en-US Version Number: 1 Version Date (UTC): 9/20/2010 11:46:17 PM Html Content: **Terms of Use** *Please read the following terms of use. Select I accept if you agree to them or I decline computing features here if you do not accept the terms.* **Overview** The social computing features enabled here are meant to enhance productivity and enh... a private community will only be seen by members of that community. Tags that you or comments, please be aware that those items may be seen by many people in man... By clicking I accept, you agree that you have read, understand and agree to these ter... Edit Delete
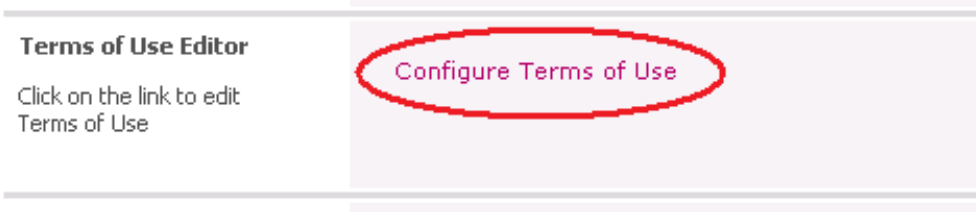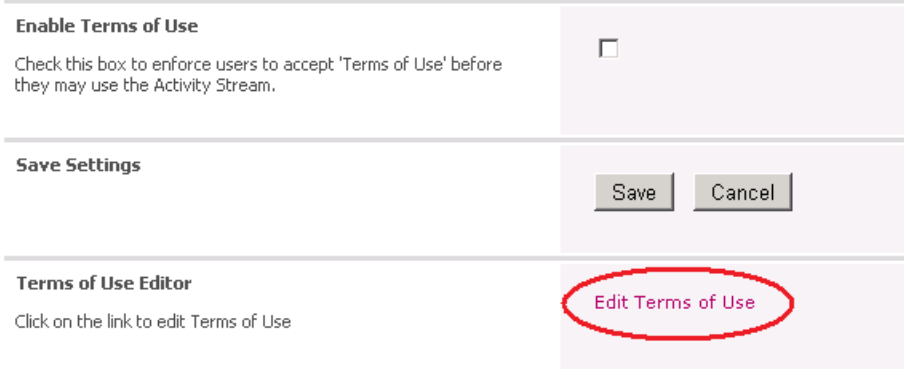
The page for editing the selected terms of use appears.

5. Make your desired changes in the Html Content section, then Click the **Update** link at the bottom. If you decide to abandon your edits, click the Cancel link at the bottom, or the return link near the top.

Please review Terms of Use information below. Click Update to save a new version of Terms Cancel to exit edit mode.

To return to the list of Terms of Use click here

Culture Info Name: en-US

Version Number: 1

Version Date (UTC):   9/20/2010 11:46:17 PM

Html Content: *

```
<div>
    <div>
        <h2>Terms of Use</h2>
        <i>Please read the following terms of use.
if you agree to them or I
```

```
                        or tagging something may be seen anywhere i
organization. This helps people
```

Update Cancel

You are returned to the Terms of Use version list. Notice that the version has been incremented automatically for the en–US language/culture.

This is a list of Terms of Use versions by culture. Click "Edit" to select a record for editing.

To create a new Terms of Use record click here

	Culture	Version	Version Date (UTC):
Edit	en-US	2	9/22/2010 12:58:35 AM

Creating terms of use in other English variants or non-English languages

You can simultaneously have terms of use in multiple languages. To create terms of use in different languages, just specify the appropriate language and culture code when creating a new terms of use using the steps below. The languages supported by Sitrion Social, with their culture codes, are as follows:

- de-DE   German (Germany)
- en-US   English (United States)
- es-ES   Spanish (Spain, International Sort)
- fr-FR   French (France)
- it-IT   Italian (Italy)
- pl-PL   Polish
- ja-JP   Japanese (Japan)
- ko-KR   Korean (Korea)
- pt-BR   Portuguese (Brazil)
- ru-RU   Russian (Russia)
- tr-TR   Turkish (Turkey)
- zh-CN   Chinese (Simplified, PRC)

- zh-TW   Chinese (Traditional, Taiwan)

Action	Result
1. From the Social Platform Management page, click **Configure Terms of Use**.	**Terms of Use Editor** Click on the link to edit Terms of Use *Configure Terms of Use*
The Terms of Use configuration page appears. 2. In the **Terms of Use Editor** section, click on **Edit Terms of Use**.	**Enable Terms of Use** Check this box to enforce users to accept 'Terms of Use' before they may use the Activity Stream. ☐ **Save Settings** Save Cancel **Terms of Use Editor** Click on the link to edit Terms of Use *Edit Terms of Use*
The Terms of Use version list appears. Out-of-the-box, this will contain a default Terms of Use in ten different languages. 3. Click **"To create a new Terms of Use record click"** at the top.	This is a list of Terms of Use versions by culture. Click "Edit" to select a record for editing. To create a new Terms of Use record click <table><tr><th></th><th>Culture</th><th>Version</th><th>Version Date:</th></tr><tr><td>Edit</td><td>de-DE</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>en-US</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>es-ES</td><td>1</td><td>9/30/2011 4:47:30 PM</td></tr><tr><td>Edit</td><td>fr-FR</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>it-IT</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>ja-JP</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>ko-KR</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>ru-RU</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>zh-CN</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr><tr><td>Edit</td><td>zh-TW</td><td>1</td><td>9/30/2011 10:18:21 AM</td></tr></table> Cancel

The page for entering a new terms of use appears.

4. Select the culture code of the language in which you'll be creating a Terms of Use in the **Culture Info Name** dropdown.

5. Enter the terms of use for your chosen culture in the **Terms of Use Text** field.

6. Click the **Save** link at the bottom to save your new terms of use.
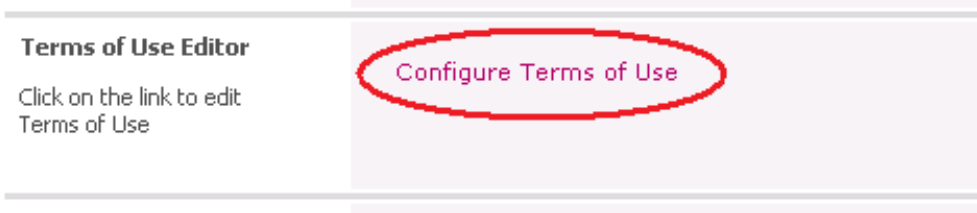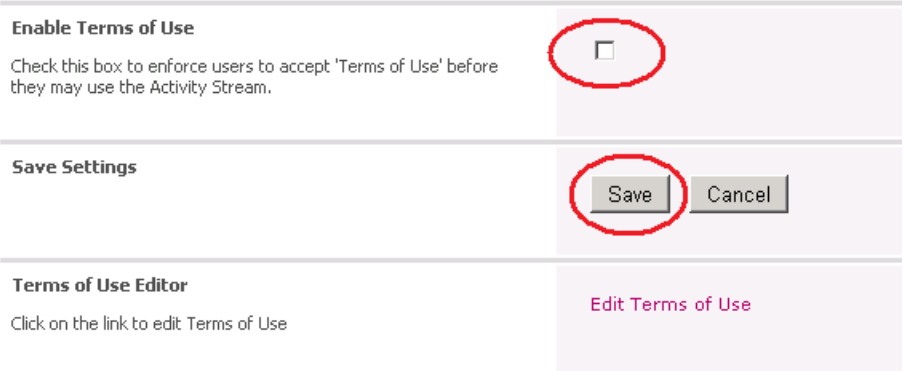
Making different language versions of the terms of use available

If you have, or have created, a terms of use in an alternate language, there are some steps to take before users will be able to see the terms of use in the alternate language.

1. The terms of use feature must be active (see **Activating the terms of use feature**, below).
2. The SharePoint language pack for the user's language must be installed.
3. On the site containing your activity stream web part, you must go to the Site Settings page and click Language Settings, then check the box for the user's language under the Alternate Languages section.
4. The user herself must then go to the site, and from her personal menu must open "Select Display Language" and then choose her preferred language. The terms and conditions will then display to the user in the user's chosen language.

Activating the terms of use feature

Once you have set up your Terms of Use in all language variants to your satisfaction, you must enable the feature to prompt users to accept the terms to continue using the activity feed.

Action	Result
1. From the Social Platform Management page, click **Configure Terms of Use**.	**Terms of Use Editor** Click on the link to edit Terms of Use Configure Terms of Use
The Terms of Use configuration page appears. 2. Check the box in the **Enable Terms of Use** section. 3. Click Save in the **Save Settings** section.	**Enable Terms of Use** Check this box to enforce users to accept 'Terms of Use' before they may use the Activity Stream. ☐ **Save Settings** [Save] [Cancel] **Terms of Use Editor** Click on the link to edit Terms of Use Edit Terms of Use

Abuse Reporting Configuration page

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use |
Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

Abuse reporting is an optional feature that allows users to report stream activities as being abusive or offensive. Turn it on by clicking the Configure Abuse Reporting link to get to the Abuse Reporting Configuration page, then checking the **Enable Abuse Reporting** box:

Enable Abuse Reporting

Check this box to enable users to report stream activities as being abusive or offensive.

☑

Enable Anonymous Abuse Reporting

Check this box to make abuse reports anonymous. Leaving the box unchecked will cause the reporting user's name to be sent with the report.

☐

Abuse Report Receiver

Enter the e-mail address which will receive abuse reports. If this is left blank, abuse reports will not be sent.

briank@newsgator.com

Save Settings

[Save] [Cancel]

Besides choosing to turn on this capability, the other settings are whether the reporter to be anonymous or public and what email address should get the abuse report emails.

When this is enabled, a user may report an item as abusive by choosing "Report" from the pull-down control on an activity stream item. When they do, a dialog appears to collect their reason for reporting the item.

Brian Kellner: back to working on my #beta #release #notes - #beta will be out tomorrow

about 2 hours ago   Like   Comment

Hide all Microblogging

Report

The reporting form tells the user whether their report is anonymous or not.

When the user submits this report, a confirmation dialog is displayed and an email is sent to the address specified in Central Admin.
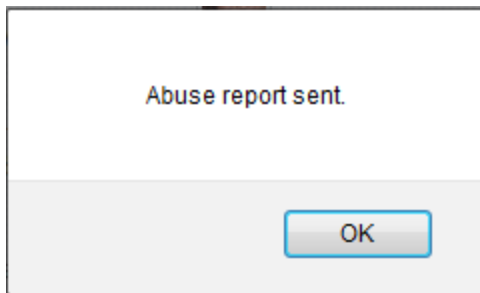
The notification email contains a link to the View page so that the item can be deleted (hidden from display) if necessary.
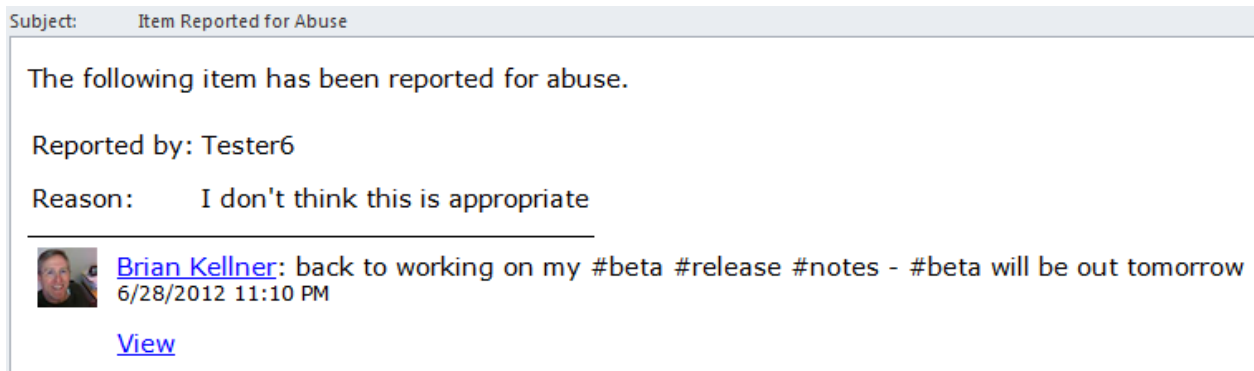
Reporting Configuration page

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use |
Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

Click **Configure Reporting Settings** to get to the Reporting Configuration page.

Any service accounts used as authors of activity stream items will appear as actual users with large activity counts in the NewsGator Top Users Activity report, unless you specify these accounts to be excluded from these reports.

In the **Report User Exclusion** section, enter any such accounts. If you have deployed the optional News Stream module, you should include the News Activity Author account as specified in the News Stream Options screen of the Sitrion Social installer (see Sitrion Social Install Guide for details), and also in the management page of the NewsGator News Stream Services service application, News Activity Settings section (see the *Administration* section in the News Stream module portion of this guide for details).

Report User Exclusion

This will allow you to add users to be excluded from the report displays.

Web Application: **http://sp2010app01:88/** ▾

Service HAL RSS ;

OK   Cancel

Configure Smart Tips page

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use | Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

Click **Configure Smart Tips** to get to the Configure Smart Tips page.

	Priority	Title	Description	Alias	Threshold	Assembly Name	Class Name	Enabled	
✚	1	Profile Picture Missing	Produces a tip if the user has not specified a profile picture.	ProfilePic		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.ProfilePicTipProvider	☑	
✚	2	"Ask Me About" Missing	Produces a tip if the user has not specified any "Ask me about" tags.	AskMeAbout		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.AskMeAboutTipProvider	☑	
✚	3	"Interests" Missing	Produces a tip if the user has not specified any "Interests" tags.	Interests		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.InterestsTipProvider	☑	
✚	4	No Recent Microblogs	Produces a tip if the user has not posted a microblog in this many days.	Microblog	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.MicroblogTipProvider	☑	
✚	5	No Recent Questions	Produces a tip if the user has not posted a question in this many days.	Question	30	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.QuestionTipProvider	☑	
✚	6	Few Colleagues	Produces a tip if the user has fewer colleagues than this.	Colleague	5	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.ColleagueTipProvider	☑	
✚	7	Few Followed Communities	Produces a tip if the user is following fewer communities than this.	Community	5	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.CommunityTipProvider	☑	
✚	8	No Recent Picture Uploads	Produces a tip if the user has not uploaded a picture in this many days.	PictureUpload	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.PictureUploadTipProvider	☑	
✚	9	No Hashtag Usage	Produces a tip if the user has not posted a microblog with a hashtag in this many days.	Hashtag	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.HashtagTipProvider	☑	
✚	10	No @ Target Usage	Produces a tip if the user has not posted a microblog with an @ target in this many days.	Targeting	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.TargetingTipProvider	☑	
✚	11	Few "Likes" on Posts or Questions	Produces a tip if the user has not "liked" a microblog or question in this many days.	LikeEvent	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.LikeEventTipProvider	☑	
✚	12	Few "Likes" on Comments or Answers	Produces a tip if the user has not "liked" a comment or answer in this many days.	LikeMeta	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.LikeMetaTipProvider	☑	
✚	13	No Recent Private Messages	Produces a tip if the user has not posted a private message in this many days.	PrivateMessage	30	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.PrivateMessageTipProvider	☑	
✚	14	No Recent Answers	Produces a tip if the user has not answered a question in this many days.	Answer	10	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.AnswerTipProvider	☑	
✚	15	No Follow-ups	Produces a tip if the user has not marked an item for follow-up.	FollowUp		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.FollowUpTipProvider	☑	
✚	16	No Polls	Produces a tip if the user has not posted a question with a poll.	Poll		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.PollTipProvider	☑	
✚	17	Never Used Mute	Produces a tip if the user has not muted an event.	Mute		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.MuteTipProvider	☑	
✚	18	Many Unread Notifications	Produces a tip if the user has more unread notifications than this.	Notification	50	SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.NotificationTipProvider	☑	
✚	19	No Idea Submissions	Produces a tip if the user has never submitted an idea.	IdeaSubmit		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.IdeaSubmitTipProvider	☑	
✚	20	No Idea Votes	Produces a tip if the user has never voted on an idea.	IdeaVote		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProviders.IdeaVoteTipProvider	☑	

Save   Cancel

Sitrion Social ships with twenty default tips defined. Administrators can enabled or disable a particular tip, adjust the tip's priority, adjust a threshold value if appropriate, and edit or add descriptive text for the tip. Clicking the edit icon in the right column gives access to these controls.

✚	4	No Recent Microblogs	Produces a tip if the user has not posted a microblog in this many days.	Microblog	30	☑	💾 ✖
✚	5	No Recent Questions	Produces a tip if the user has not posted a question in this many days.	Question	30	☑	

The tip priority is used to control the order in which users see tips. When the job runs to send out tips, it analyzes the tips in priority order. In the example screenshot above, "profile picture missing" is the highest priority tip. So the job will first look at each user to see if they should get this tip. A user should get this tip if she does not have a profile picture uploaded and she has not received this tip in the last week (to avoid just repeating the same tip over and over). If a user either already has a profile picture uploaded or has received this tip recently, Sitrion Social will look at the second highest priority tip to see if that should be sent to the user. In this way, setting the priority of tips allows each company to focus guidance on particular areas before guiding users on other areas.

NOTE: As of the 5.1 release, only one active tip is considered each day. All users who meet the threshold value for that tip will get it. The next day, the next active tip will be evaluated. After the full list has been processed, the job will start over with the first active tip.

The threshold value applies for some types of tips. The description text tells how the threshold value will be used. In the example, the tip will only be sent if the user has not added a microblog for 30 days. Disabling a tip means that it will never be sent. Clicking the disk icon saves changes – the red circle with the X cancels changes. IMPORTANT NOTE: You must click "Save" at the bottom of the page to save all your final changes when you are done.

The plus icon on the left side of the page allows editing the message for a specific tip.

⊟	1	Profile Picture Missing	Produces a tip if the user has not specified a profile picture.	ProfilePic		SocialSites.Core.ApplicationServices	SocialSites.Core.ApplicationServices.SmartTips.TipProv

	Culture	Message	Default	
	en-US	Adding a profile picture is a great way to help people connect your name with your face	☑	📝 ✖
	de-DE ⌄		☐	✚ ✖

You can change or add to the default text in English or add text for any of the other supported languages for Sitrion Social. The default checkbox indicates which language to display if no language preference is specified by the user. Links are automatically added to certain types of tips when there is a known place to direct the user (as shown in the example below).
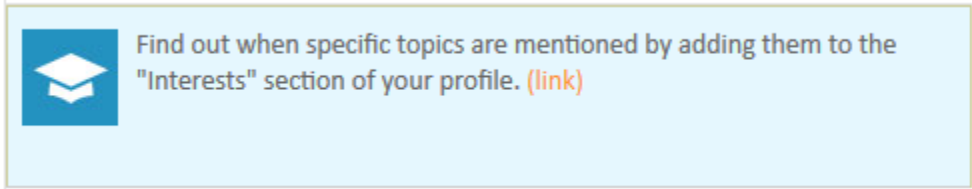
If you want to add a link that takes the user to the Settings dialog, you can put in a link to any page that has the personal activity stream and add the query string ?ngsettings=1. So a link like this http://[SERVERNAME]/Lookout.aspx?ngsettings=1 can display the settings dialog.

NOTE: As of the 5.2 release, you can use this link to give users direct access to the settings dialog: http://[ServerName] /_layouts/ng/pages/usersettings.aspx

IMPORTANT NOTE: You need to click the Save at the bottom of the page to save these settings as well.

Customers can add their own tip providers to check for additional conditions. The UI for adding a provider requires filling in several fields.

Priority Title	Description	Alias	Threshold	Assembly Name	Class Name

Save   Cancel

The code to evaluate a particular custom tip is the customer's responsibility. Basically anything can be covered here so long as the code can tell whether a particular user does or does not need that tip.

Translation Settings page (SharePoint 2013 / 2016 only)

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use |
Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

Background

While the user interface of Sitrion Social is translated into many languages, the content in the activity stream is in a single language. Sitrion Social provides the ability to use a Microsoft service to translate activity stream items into other languages. This capability allows for both immediate translation of an individual activity stream item when a user chooses it or automatic translation of all the content. Because some translation services cost money (see below), companies may choose to configure differently (note: It is possible with custom development to use a service besides a Microsoft service to perform the translation.)

For SharePoint 2010, this is no longer available as of 2017-03-31 due to Azure DataMarket and Data Services being retired by Microsoft.
For SharePoint 2013 / 2016, administrators will need to provision the SharePoint Machine Translation Service Application.

When translation is enabled (procedure described below), activity stream items will have a translate menu with all available languages. This will translate the individual item when a user selects the language as shown in the screenshot below.
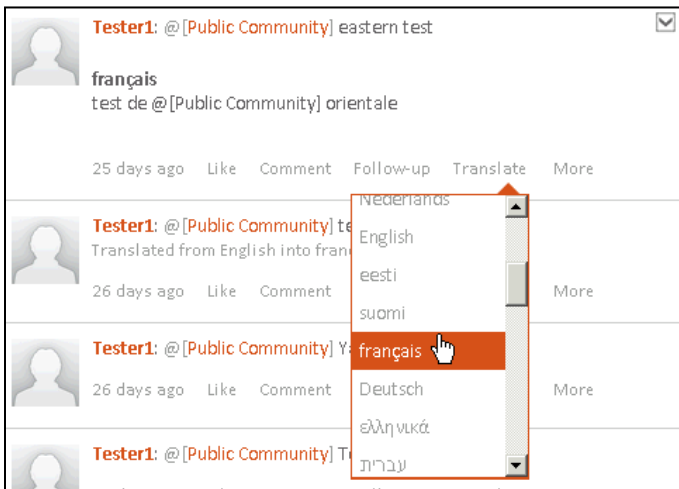
Enabling Translations

Click **Translation Settings Page** to get to the Translation Settings page.

On this page, the admin can select languages to "automatically" translate content into. When one or more languages are selected, a NewsGator Translation timer job will be created that runs every 15 minutes by default. This will take all the items from the last 14 days that have not been translated and will translate them – storing the translated versions.

When one or more languages are selected for automatic translation, the user will be able to select them from their activity stream settings.
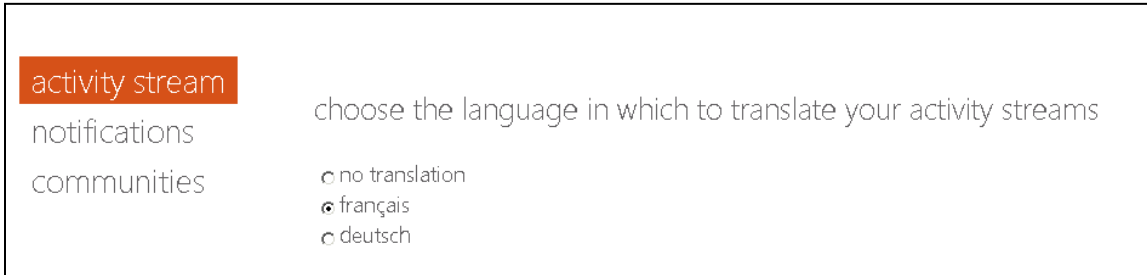
When a language is selected here, the user's stream will still use the language of the site for the UI elements. However, items that have been translated will display their text in the translated language:

Items that have not yet been translated will simply display in their original language.

Office 365 Bridge (SharePoint 2013 only)
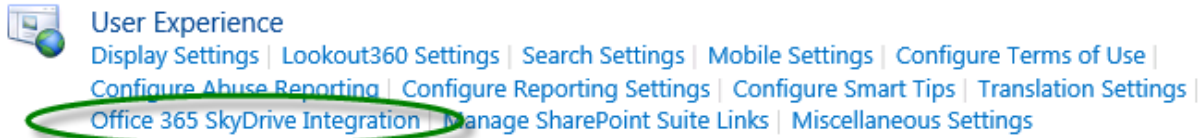
NOTE: As of May 2015, this feature is no longer supported.

Manage Suite Bar Links (SharePoint 2013 only)
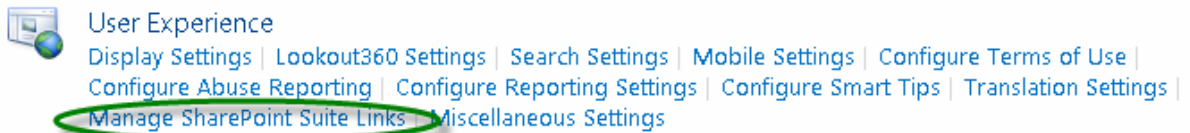
Click **Manage SharePoint Suite Links** to get to a page that allows hiding and/or adding links to the SharePoint 2013 Suite Links bar when the NewsGator Lookout Suite Link Bar farm feature is enabled.
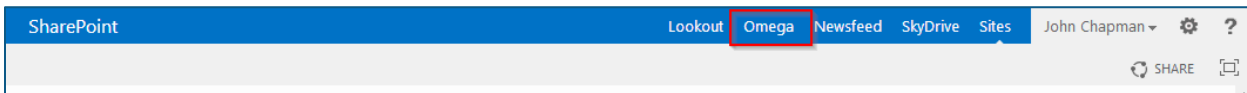
Hide SharePoint Suite Links

Hidden Suite Links will not display in the SharePoint Suite Links bar when the NewsGator Lookout Suite Link Bar farm feature is enabled.

☐ Hide Lookout

☐ Hide Newsfeed

☐ Hide SkyDrive

☐ Hide Sites

Add SharePoint Suite Links

These links will be added to the SharePoint Suite Links bar whent the NewsGator Lookout Suite Link Bar farm feature is enabled. Links marked "Render Before Default Links" will display prior to the default SharePoint links (Newsfeed, etc.). Otherwise links will display after the default SharePoint links.

Display Title	Link	Before Default
Remove Omega	https://omega.corp.newsgator.com	✔

Display Title

[   ]

Link

[   ]

☐ Render Before Default Links

[Add Link]

[Save]   [Cancel]

NOTE: Some customers wanted the ability to use the custom Sitrion SharePoint Suite Links in every farm controlled from 1 farm. To support this, the SuiteLinks configuration has been moved to the FarmConfiguration table. This will allow the parent farm to set the links, and then a consuming farm to use them. In this scenario, the parent farm must be on 2013. (This capability is only available starting in the 5.2 release)

Miscellaneous Settings page

User Experience
Display Settings | Lookout360 Settings | Search Settings | Mobile Settings | Configure Terms of Use |
Configure Abuse Reporting | Configure Reporting Settings | Configure Smart Tips | Translation Settings | Miscellaneous Settings

NOTE: As of the 5.2 release, a new setting has been added at the top of this page to allow the Sitrion ONE mobile client to be used as a client for the Sitrion Social platform. In the 5.2 release, there are specific capabilities in the Sitrion Social software to make it easy to use the Sitrion ONE client for social uses cases. First, there is a setting in Central Admin in the Miscellaneous Settings page.

Sitrion ONE Integration

Integration options for the Sitrion ONE cloud platform and mobile clients

☑ Create Social Cards in Sitrion ONE

Checking this box causes Sitrion Social to send data to the Sitrion ONE cloud service to create cards for users whenever new microblogs or questions are added to the stream. Users with the Sitrion ONE client will see these cards whenever they log in with the ONE client.

Checking this box also causes the Sitrion Social server software to update these cards as comments or answers are added. The card stored in the Sitrion ONE cloud has the three most recent comments, so the card gets updated as new comments are added.

Lastly, the 5.2 release includes code that looks at the users notification settings and sends push notification messages to the Sitrion ONE mobile client if the setting to send cards is on, the user has opted in for push notifications, and some event in the stream related to a microblog or question triggers a notification the user has selected. Note that this ties into the notification channels setting in that, if a user has disabled a particular notification for sending mobile push messages, neither the Sitrion Social mobile client nor the Sitrion ONE mobile client will get a push notification for that case.

Click **Miscellaneous Settings** to get to a page with several different Sitrion Social behavior options (screenshot only shows top portion of page):
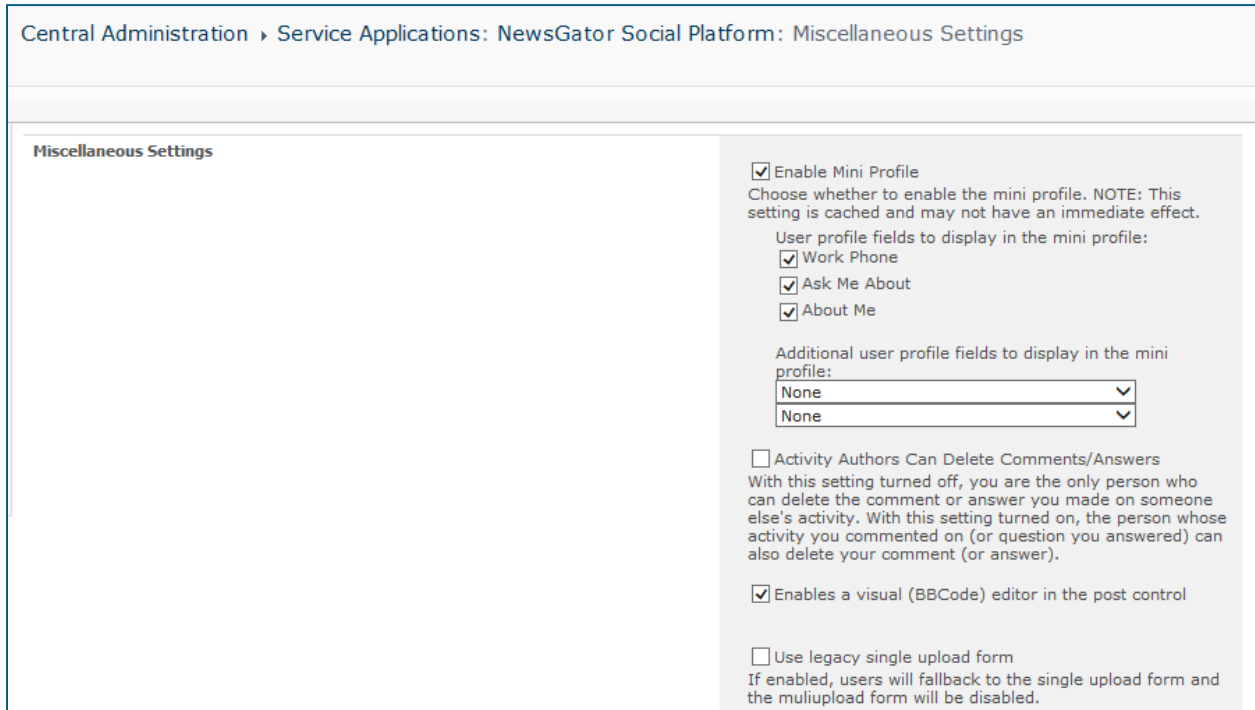
After making changes to any setting, click the **Save** button at the bottom of the page to put your changes into effect. Due to caching, users may not immediately see the behavioral changes.

Enable Mini Profile
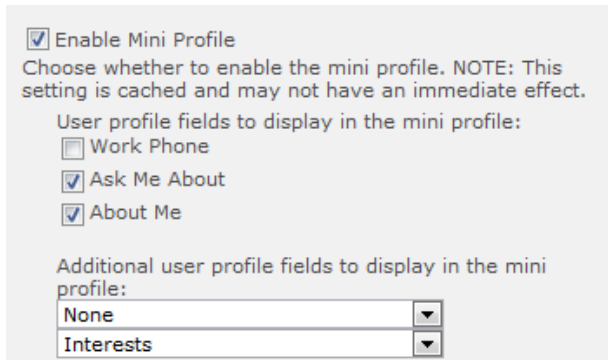
With "**Enable Mini Profile**" turned off, when you leave your mouse pointer over a user's name or picture in the NewsGator activity feed, a tooltip will appear displaying that user's name.

With "**Enable Mini Profile**" turned on, when you leave your mouse pointer over a user's name or picture in the NewsGator activity feed, a small window pops up containing basic profile information for that user, as in the picture below. This window is referred to as that user's "mini profile". From here you can send that user an email, open the full profile of this user, or open the full profile of any of the common colleagues pictured.
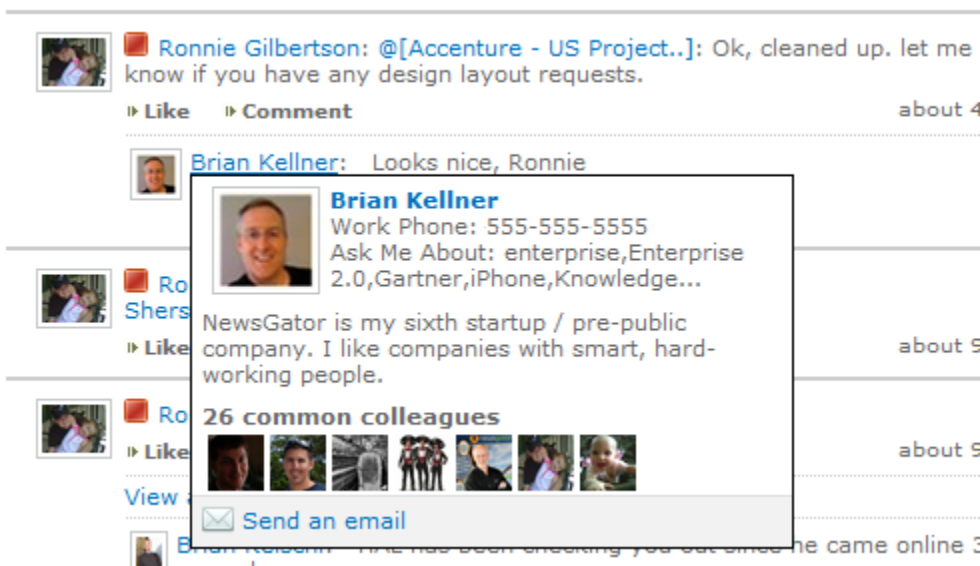
Configure the Mini Profile

Administrators can choose to not include any of the three default fields (work phone, ask me about, and about me) as well as add up to two fields from the user profile to include in the display on the mini-profile card.
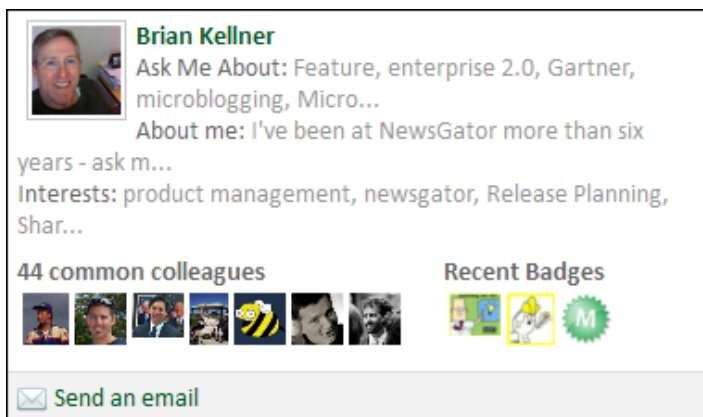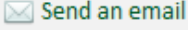
When the card is viewed, the additional fields are displayed at the bottom. (Note that to handle displaying of variable numbers of fields and fields of varying lengths, longer portions of text have to be truncated. Only the first 50 characters will be displayed. This also means that html cannot be displayed in the card even if users have added it to the selected fields.)

Activity Authors Can Delete Comments

With "**Activity Authors Can Delete Comments**" turned off, the only user who may delete a comment made on an activity feed item is the person who made the comment. The author of the event being commented on cannot delete the comments that have been made on that event.

With "**Activity Authors Can Delete Comments**" turned on, the author of an activity stream event can also delete any comment that has been made on their event.

Append User Full Name After @target

With "**Append User Full Name After @target**" turned off, @-targeted usernames in microblog posts appear as originally typed by the posting user (top example, below).

With "**Append User Full Name After @target**" turned on, the user's full display name is inserted automatically after any @-targeted username in a microblog post (bottom example, below).

Allow Users to Share Private Events

NOTE: As of the 5.1 release, private events may not be shared. So this setting is removed from Central Admin.

With "**Allow Users to Share Private Events**" turned off, there is no "Share" option in activity stream events that are private (e.g. events coming from private communities or private messages). This screenshot provides an example of the normal view of a private message:

With "**Allow Users to Share Private Events**" turned on, a Share option will now be available:

Enable visual editor in post control

This setting determines whether users will see controls for formatting in the posting box.
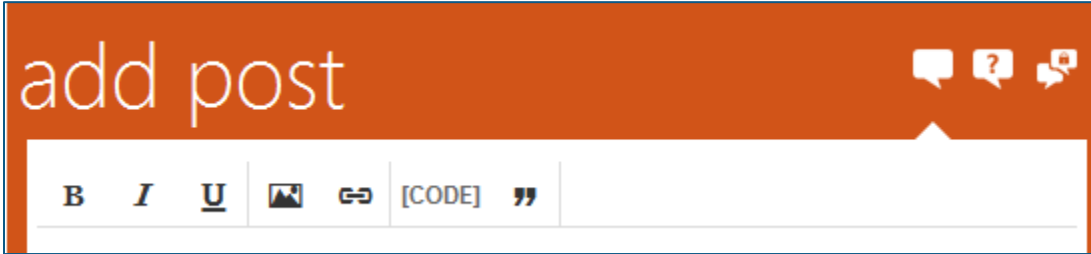
Post upload control options

In some environments, the multi-file upload control does not perform well (e.g. due to conflicts with the browser). To allow companies to control the user experience, there are now several settings.

The "use legacy single upload form" option switches off multi-file upload completely and reverts to the single file upload control. The other options allow administrators to disable specific parts of the multi-file upload control that may cause issues. The multi-file upload control will attempt to use all of these technologies, but may get stuck on one that should work but fails for some reason in the environment (e.g. Silverlight). By disabling this option, the control will switch to one of the other options.

Append Full Name after @ Target

This setting causes the name of targeted user to appear after the @ target string. It is useful when the @ target strings have no relationship to the user's actual name (e.g. @ad234vt7)

Use Full Name for @Targeting

The "**Use Full Name for @Targeting ...**" option is useful for organizations in which usernames are not correlated with the names of actual users. In those cases, the default Sitrion Social behavior of allowing @username to target a user is not helpful. While the autocomplete feature in the Activity stream web part can match based on having typed a portion of the preferred name, with "Use Full Name for @Targeting ..." turned off, the username is still pasted into the stream leading to posts that display things like "@1237JXY".

With "**Use Full Name for @Targeting ...**" turned on, Sitrion Social can target by using @(Preferred Name). If this pattern is entered, Sitrion Social will look to see if it matches only one user in the system. If there are multiple matches, it will only send a notification to a targeted user if the sender of the message has only one colleague who matches.

So, in the example above, if Brian has two colleagues named "Dan Larson", no notification will be sent. Otherwise the notification is sent to Dan Larson.

Enable hashtag suggestions

With "**Enable hashtag suggestions**" turned off, users are left to their own devices to decide when a word they type will make a suitable hashtag by which to index the post so that others may more easily locate it. In fact, not all users know that they can type the # sign and get suggestions on hashtags, and this important tool for making user content more visible to others may be underused.

With "**Enable hashtag suggestions**" turned on, Sitrion Social will provide suggestions to users as they type a post or response as to which words they should make into hashtags, and provide a single-click method for the user to make the conversion. As users type in microblogs or questions, suggestions appear below the entry area:
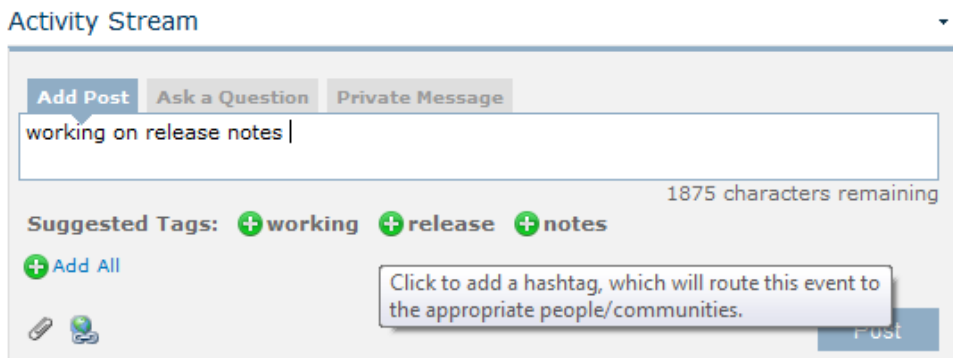
Mousing over the suggestions gives a tool tip to tell the user what clicking on the "+" symbol will do. When the user clicks, the hashtag is added in the post.

Clicking on "Add all" will add all the suggested hashtags. To limit potential performance impacts, only single-term hashtags will be suggested and the system only searches for matching terms after a space is typed at the end of a word.

Note: If you choose to use the setting which allows auto completion of hashtags based on the SharePoint metatag store, the ability to autocomplete will expire after the web page has been loaded for at least 30 minutes without refreshing. Refreshing the web page will reset the autocomplete behavior both for hashtag suggestions and auto completion of hashtags when a user types the # symbol.

Open hashtag page when filtering

With "**Open hashtag page when filtering**" enabled, users will always be taken to a full page view when clicking on a hashtag (versus filtering within the stream view). This full-page view has additional features such as options to add the tag to the users "ask me about" field and showing statistics on usage of the tag.

Include all users in autocomplete when @targeting

With "**Include all users in autocomplete when @targeting**" turned off, when a user types @ and part of a name, they'll get a list of potential matching people from among their colleagues. Nobody who is not a colleague will appear as an option.

With "**Include all users in autocomplete when @targeting**" turned on, when a user types @ and part of a name, they'll get a list of potential matching people from among all SharePoint users, including people who are not the user's colleague.

In this example screenshot, the user typing the @ symbol has only added two of these "Brian's" as a colleague.

Include all public discoverable groups in autocomplete when @targeting

With "**Include all public discoverable groups in autocomplete when @targeting**" turned off, when a user types @ and part of a name, they'll get a list of potential matching people from among communities and spheres which they are following only.
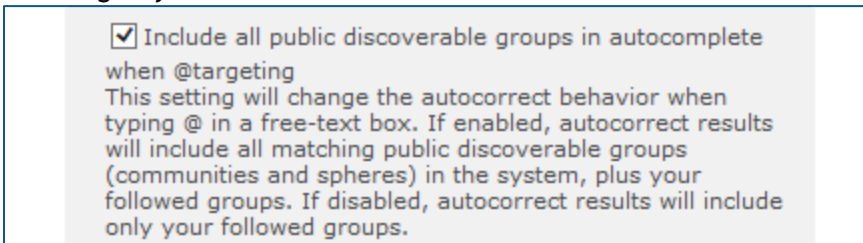
When this checkbox is selected, all public discoverable groups will autocomplete in addition to the groups the user is following. This functional only works if the feature to autocomplete all users is also selected.

Enforce preservation of activity event privacy

With "**Enforce preservation of activity event privacy**" turned off, a user can make a private activity stream item public by targeting it to additional people or communities, or by sharing to the same. Sitrion Social will caution the user against doing so, but it will not prevent them from doing it.

With "**Enforce preservation of activity event privacy**" turned on, activity items will retain its security scope. A user will be unable to show a message from a private community to a wider audience by sharing it with, or @-targeting it to, another person, sphere, or community.

In this example, a private sphere is added to a post.

Then a public community is added to the same post.
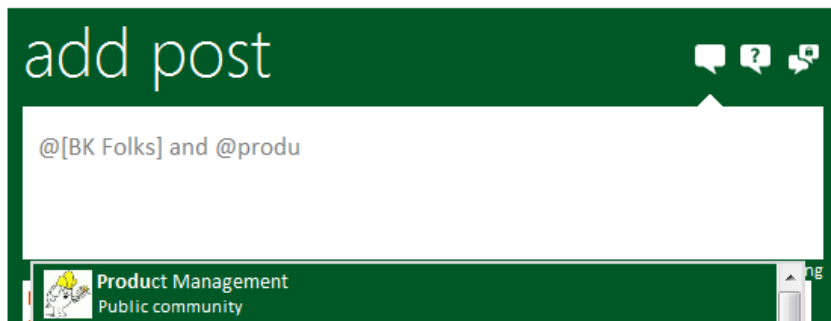
The user is told that this is not allowed and the post is blocked from being added to the stream.

Enable editing microblogs, questions, comments and answers

With "**Enable editing microblogs, questions, comments and answers**" turned off, there is no Edit option on any user-created Activity Stream content.

With "**Enable editing microblogs, questions, comments and answers**" turned on, users will see the Edit option in the upper right corner menu of microblogs or questions which have not yet had comments or likes added to them.

For compliance reasons, Sitrion Social keeps a copy of the original item as it was created. So clicking "Edit" actually marks the original item as deleted in the database and creates a new item with the same starting text already populated.

Editing a comment or answer works the same way.

Enable editing of microblogs and questions AFTER comments or likes have been added

Before 5.2, the only time editing was allowed on a microblog or question was before any like or comment was added. With this feature, companies can decide if they want to allow posts to be edited even if there are already likes, comments or answers on them. The setting which enables this behavior is in the Miscellaneous Settings section.

☑ Enable editing microblogs, questions, comments and answers.
Turning this setting on will allow users to edit microblogs, questions, comments and answers that they have authored.

☑ Enable editing microblogs and questions AFTER comments or likes have been added.
This allows users to edit microblogs and questions that they have authored AFTER comments and likes have been added. NOTE: Editing must also be enabled for this to take effect.

Note that the new setting to allow editing after comments or likes have been added requires that you enable the broader setting above it to allow edits.

Enable link previews

☑ Enable link previews
If enabled, typing in a link will display a preview with the option to include a thumbnail.

With "**Enable link previews**" turned on, when a user includes an URL while creating a microblog, Sitrion Social automatically looks for an image and summary to include in the resulting post. If found, the image and summary will be displayed to the author of the post while they are still constructing it. The author will have the option of excluding the image, or excluding the entire preview.

With "**Enable link previews**" turned off, no preview is provided of the page referenced by an URL in a post. Turning this setting off is useful for organizations which run SharePoint under https, because the image in the link preview will cause a mixed-content warning (http and https on the same page) to appear to many users of Internet Explorer, every time they view a post that contains a link preview.

Suggest Ahead Capabilities

The next two checkboxes only apply if you have configured an App Fabric Cache server (see Manage Cache Settings) and if you are running the Suggest Ahead job.

☑ Enable post suggestions as the user types
When enabled along side the SuggestAhead Feature, the user will be suggested possible matches to the current microblog or question entry.

☑ Enable community suggestions as the user types
When enabled along side the SuggestAhead Feature, the user will be suggested communities to target.

Both of these checkboxes are based on analyzing text as the user types and comparing with public questions and microblogs. Questions with answers from the last year are included as possible matches as well as questions without answers and microblogs from the last 30 days. Based on an initial language comparison, specific words are checked for matches (with hashtags getting more emphasis). If any questions or microblogs show a strong enough match, either those specific posts or the communities referenced in those posts (or both if both boxes are checked) are displayed to the user as shown in the screenshot below.

add post

I want to enforce that community members #notifications

+Add people to this conversation

9944 characters remaining

Suggested Tags: ⊕want ⊕community ⊕members

post

add destinations to your post:

+Product Management   +Product KnowledgeBase   +Private1   +Customer Stories +Services and Support

these posts may be similar to yours:

@[Product Management] how do I enforce that **#community** members get email **#notifications**

@[Product Management] Will #4.0 enable the ability to enforce community members to receive email **#notifications** on specific items?

@[Product Management] testing out a slight change in email notification subject. This should produce a notification which starts out by saying Community Microblog and then puts in the starting activity text. Because Dan put in a neat feature for hashtags, it should

Clicking on a community will add it to the "add people to this conversation" section as a target for the post. Clicking on a post will open it in a dialog box so the user can view the post and all comments.

Note that the Suggest Ahead job must be allowed to run to build suggestions, the cache must be enabled, these checkboxes must be selected, and the Suggest Ahead job must be run again to fill the cache with suggestions before users will see suggestions on their posts. If your Sitrion Social environment does not have a great deal of data, you may want to start with only community suggestions and enable post suggestions after you have more posts which are likely to be helpful.

Community Recognition

This setting determines if community owners will have access to create badges and badge rules at a community level. This only applies if the Spotlight module is installed.

> ☑ Enable Community-level Recognition
> When enabled, Community administrators can create badges and rules for Spotlight Recognition.

jQuery Settings

These settings control how jQuery behaves in Sitrion Social. You only need to use these settings if you are doing jQuery based development on SharePoint.

jQuery Settings

Section for customization of how jQuery is used.

☑ Enable jQuery Migrate
jQuery has created the jQuery Migrate plugin to simplify the transition from older versions of jQuery. The plugin restores deprecated features and behaviors so that older code will still run properly on jQuery 1.9 and later. Use the uncompressed development version to diagnose compatiblity issues, it will generate warnings on the console that you can use to identify and fix problems. Use the compressed production version to simply fix compatibility issues without generating console warnings.

☑ Enable jQuery Migrate development version
Use the uncompressed development version to diagnose compatiblity issues, it will generate warnings on the console that you can use to identify and fix problems. Disable this to use the compressed production version to simply fix compatibility issues without generating console warnings.

☐ Use your own version of jQuery
We require a minimum version of jQuery 1.10.2 to be used. If any other version is used you may see unexpected results in the UI. The version of your jQuery must be loaded a the top of the head tag for all our code to be initialized properly.

Image Proxy Settings

You only need to use these settings if you are setting up a proxy service for images. The typical reason for doing this is that your SharePoint environment runs under https and you have users sharing images from http sources. Sitrion can provide code for a proxy service that will take images from an http source and serve them as https to avoid users getting browser warnings about mixed security context. Contact Sitrion if you want to install this proxy. The installation instructions will include information on setting these values.

Pictor (picture proxy service)

Proxy service to transform url scheme to requested scheme plus other options for manipulating external anonymous images.

Pictor service url (example: pictor.domain.com)

Pictor API key

Pictor Secret

☐ Enable picture proxy service

Forbidden Words

Administrators can specify terms that cannot be posted to the stream from the Miscellaneous settings page on the NewsGator Social Platform Service.

Forbidden Words

These words are not allowed to be used during any sort of posting to the NewsGator activity feed. Separate multiple entries with a ';'. Multiple-word entries are not allowed in this list.

`purfle;`

When a user attempts to post a microblog or question containing this term, it will be blocked and the use will be informed the word is not appropriate.

add post

the word purfle is on the list of forbidden words

You cannot post with the word(s) 'purfle' in your text.

1850 characters remaining

post

Only single-word terms are supported in this feature.

Item-Level Discussions

In Sitrion Social, an item-level discussion is actually a sphere devoted to that item, centered on that item's URL. Each post in an item-level discussion contains within it a link to that sphere. When the item being discussed is not a SharePoint object, but rather a non-SharePoint web page or URL, this link to the sphere brings up a page displaying the discussion sphere on the right, and an iframe containing the web page being discussed on the left, as pictured here:
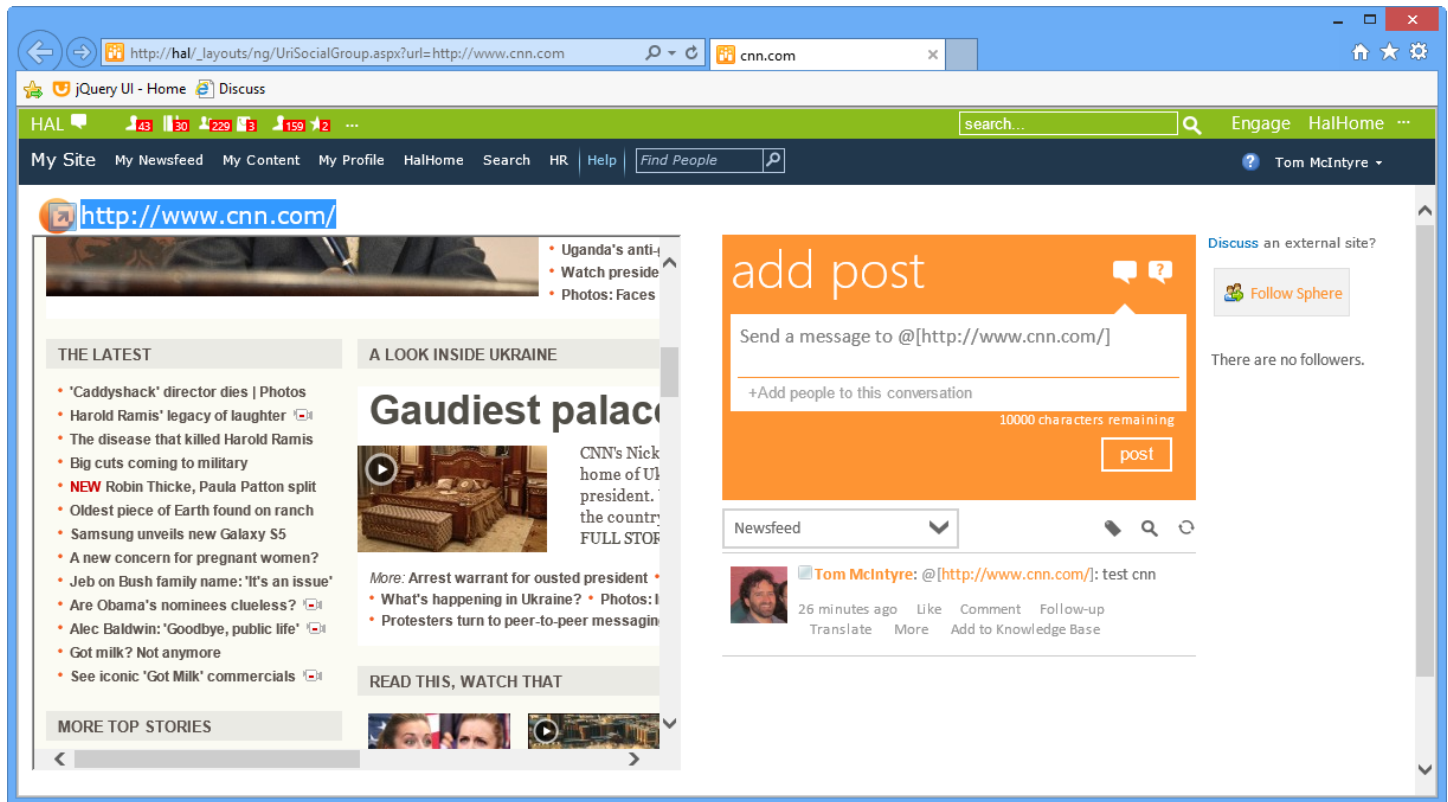
Item-Level Discussion Redirects

Some organizations would prefer to give a custom treatment to this page when used on an internal site. To allow for this, Sitrion Social has introduced the Item-Level Discussion Redirects settings at the bottom of the Miscellaneous Settings page.

Each row of these settings defines a way to modify the sphere URL so that it is redirected to the custom treatment. Only use as many rows as you need, and leave the rest blank. In the Match Regex field, put a regular expression that will match the set of URLs that you want to modify (and only those URLs). In the Substitution Regex field, use $0 to represent the matched portion of the URL, and add around this any text that you want in the replacement.

In the example pictured below, the Match Regex will match "http://www.cnn.com" and any text in the URL that comes after it. The Substitution Regex replaces this portion of the URL with the same text, but with "?Custom=true" appended.

Item-Level Discussion Redirects

A set of Regular Expression-based rules for specifying how to redirect from the item-level discussion page when the default functionality isn't desired.

Match Regex	Substitution Regex
http://www\.cnn\.com.*	$0?Custom=true
	$0
	$0
	$0

For the URL in the example picture above:

http://hal/_layouts/ng/UriSocialGroup.aspx?url=http://www.cnn.com

... this match regex matches the "http://www.cnn.com" at the end, and the substituion regex replaces this with "http://www.cnn.com?Popup=true". So when a user clicks the link to

http://hal/_layouts/ng/UriSocialGroup.aspx?url=http://www.cnn.com

they are actually taken to

http://hal/_layouts/ng/UriSocialGroup.aspx?url=http://www.cnn.com?Custom=true

The Match Regex is only evaluated when a user clicks an item-level discussion link. These settings do not affect any other kind of link that can be found in a Sitrion Social stream.

Saving the settings changes

After making changes to any setting on the Miscellaneous Settings page, click the **Save** button at the bottom of the page to put your changes into effect. Due to caching, users may not immediately see the behavioral changes.

Configuration section

Configuration
Configure Farm Settings | Configure Job Settings | View/Edit License | Manage Global Q&A Settings |
External Social Sites Connections | Manage Administrator Permissions

Configuring Farm Settings

Configuration
Configure Farm Settings | Configure Job Settings | View/Edit License | Manage Global Q&A Settings |
External Social Sites Connections | Manage Administrator Permissions

Click the Configure Farm Settings link in the Configuration section to get the identifiers of the farms in your environment, or to enable the NewsGator Social Harvester, and access settings related to the Harvester. The settings on the screen that displays apply to the local farm, and can be configured independently in a multi-farm configuration of Sitrion Social.

You can also access this page directly from Central Administration's Manage Service Applications page by clicking **NewsGator Social Platform Services Proxy**:

The following screen will display:

NewsGator News Stream Services   Newsgator

    NewsGator News Stream Services Proxy   NewsGator

NewsGator Social Platform Services   NewsGator

    NewsGator Social Platform Services Proxy   Social Ser

Search Administration Web Service for Search Service Application   Search Ad

Search Service Application   Search Se

When you are finished making changes to the settings on this page, be sure to click **Save** at the bottom.

Farm Identifiers section

The Farm Identifiers section displays for you the identifiers of the farms in your environment.

SharePoint NewsFeed Write-back Settings section

When write-back to the SharePoint Newsfeed is enabled, Sitrion Social will write social activities to the SharePoint User Profile My Newsfeed API. This will enable social content to display in the default SharePoint "What's New" web part on the My Site, and in the /_layouts/activityfeed.aspx endpoint. You would typically only do this when using the optional harvester feature of Sitrion Social, and you have some users who don't see any Sitrion Social functionality. Otherwise, using write-back is not recommended. NewsGator web parts and functionality do not read from this API, and will therefore be unaffected by turning on this setting.

NewsGator Social Harvester Settings section

⚠️ **WARNING**: The Harvester settings on this page should only be adjusted by a farm administrator. Accounts that have been granted Full Control on the NewsGator Social Platform Service's administrative permissions page will be able to access this page, however the UPA Activity Job will not respond to their changes made here.

SHAREPOINT 2013 NOTE: The "Harvester" job currently serves no function in SharePoint 2013 because the social events collected by SharePoint are integrated on display versus pulling them into the Sitrion Social database. The job is being left in the product, however, as we may choose to do more with it in SharePoint 2013 in the future.

.

To enable the NewsGator social harvester, check **Use NewsGator Harvester on this farm** and click **Save**. Note: New installations will have this enabled by default. It only needs to be activated for upgrades.

When this is done, **Disable UPA Activity Jobs on this farm** will be automatically checked and disabled. This is because the NewsGator social harvester takes over the tasks normally performed by this job, so they should not both run at the same time. Should you later decide to shut off the harvester, you must uncheck the option to disable the UPA Activity Feed Jobs (and click Save) to re-enable this job - it does not come back on automatically.

These settings changes must be repeated in every farm in your environment in which you want to run (or shut off) the Harvester.

Note: Though it should not be a problem, you may want to ensure the Health Analyzer rule called "Verify that the Activity Feed Timer Job is enabled" is disabled, or there will be a chance that the UPSA Activity Feed Job will become temporarily re-enabled. To find this, go to the Monitoring section of Central Administration, and under Health Analyzer, click "Review rule definitions". Then look in the "Configuration" category.

When turning on the harvester, be sure to set the **Minimum Event Date to Harvest** to today's date. If you set it to an older date, the harvester will put past events into users' activity streams, creating duplicates of events already put there by the UPA Activity Job.

About NewsGator Social Harvester

Enabling NewsGator Social Harvester provides many benefits and is recommended.

In Sitrion Social 2.0 and prior releases, the Microsoft Activity Feed Job collected all activity stream events from the User Profile Application changelog and the Social Metadata store. This meant that events such as Rating, Tagging by my colleague, Profile update, Note board post and Status Message appeared in the Activity Stream at a frequency determined by how often that job was running. Because of the structure of the SharePoint news feed tables, this also caused a side effect of not making it possible for Sitrion Social to know whether these events should be considered public. As a result, the Share and Comment controls were not offered on events gathered by the Microsoft Activity Feed Job.

By collecting and indexing all events, Sitrion Social with the Harvester running can now ensure consistent treatment of all these items. Additionally, companies who use the Sitrion Social database as their audit and logging repository now have all the SharePoint-gathered events captured as well.

For companies running multiple farms with User Profile Service Applications on all the farms, this creates an alternative to running the social data replication of the User Profile Replication Engine. Because Sitrion Social only needs the social data brought into the central farm where the Sitrion Social managed service application runs, this can mean substantially less replication of data among farms.

Taking advantage of the harvester: integrating hashtags and comments into SharePoint

When running the NewsGator social harvester, you will have the opportunity to activate two features that are not recommended for use when running the UPA Activity Job, as doing so introduces events into users' activity streams that are effectively duplicates. These features are activated in the **SharePoint Social Integration Settings** section of the farm settings page, pictured above. This section only appears on the Enterprise Service Farm; farm settings pages on consumer farms don't have this section. The settings here affect behavior system wide, but are included on this page because of their relationship with the harvester.

Using SharePoint tag store for auto completion of hashtags
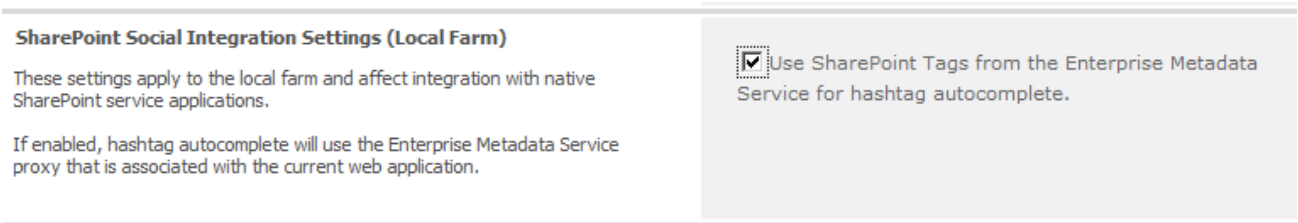
Organizations have two options for how hashtags get suggested to users. The default behavior uses terms found in the Interests and Ask Me About fields in the user profile as well as previously used hashtags. Alternatively, organizations can choose to use the SharePoint term store for auto completion of hashtags by checking the "Use SharePoint Tags from the Enterprise Metadata Service for hashtag autocomplete" option in the section pictured. The result of choosing this option is that users will get the same terms recommended to them for hashtags as they get as tag recommendations when using the SharePoint tagging UI.

SharePoint Social Integration Settings section
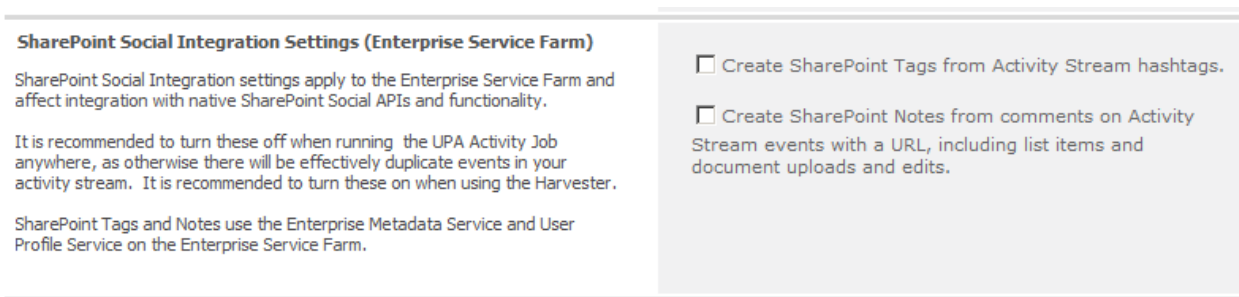
The **Create SharePoint Tags from Activity Stream hashtags** setting will cause any hashtags used in activity stream posts to be copied SharePoint as tags on the activity stream event. For example, in the microblog message below, the hashtag #Documentation is used.

And it shows up on the Tags and Notes portion of the My Profile page for the user who created the Microblog.

Importantly, when the harvester is in use, no new activity stream items are created from this (so that users don't both see the microblog event and a separate event that says "Brian tagged this 'Documentation'").

One will automatically integrate Sitrion Social hashtags into SharePoint as tags, and comments on activity stream events with an URL into SharePoint as notes on the item indicated by the URL
The **Create SharePoint Notes from comments on Activity Stream events with a URL** setting will cause comments made on activity stream events to be copied as notes on any associated list item, whose URL is included in the activity stream event. In the example below, a comment is added to the upload event for a new document.

This shows in the Tags and Notes portion of the My Profile page.

It also shows in the Notes portion when viewing the Notes control for the specific list item.

As with hashtags becoming keywords, when running the harvester the creation of these notes from comments does not generate new events in the activity stream.

Shortcuts to several admin pages for the local farm are also provided on this page.

Enforce Community Security

In some environments, when the Sitrion Social software checks with SharePoint to see if a user has access to a private community, SharePoint incorrectly responds that the user does not have access. In those environments, it is typically best to disable the security-checking part of the community processor job as it will result in incorrectly removing users from private communities.

Webtrends Integration

NOTE: As of the 5.2 release, this integration is no longer officially supported.

Shared Storage for Non-community File Uploads

NOTE: This feature is available starting in the 5.2 release.

By default, when users post to the activity stream outside of a community, any files they attach are stored in shared documents or shared pictures libraries in the user's My Site. In some organizations, these libraries do not exist, so users can only upload files into communities or paste links to files in other locations. With this feature, companies can specify a single, shared storage location that is used for all personal stream file uploads. The setting for this is in Configure Farm Settings.

The URL needs to go to the root of a site which has a document library and a pictures library that can be written to and read from by all your users. By specifying a URL here, you switch the system behavior from storing in the My Site libraries to storing in this site.

Job Configuration page

Click **Configure Job Settings** to get to the Job Configuration page. Use this page to adjust how much data Sitrion Social jobs are to process or retain.

When you are finished making changes to the settings on this page, be sure to click **Save** at the bottom.

The first settings in this page adjust the length of time Sitrion Social keeps the data it records. There are three types of data you can do this for, each with its own data retention period setting: activity records, activity notifications, and reporting data. The final setting in this section adjusts the number of user profiles that the digest email is sent to each time the job for it runs.

Activity records

Activity data will be kept indefinitely if the SharePoint Activity Feed Cleanup job is not on. When it is on, Sitrion Social will remove any activity data it created more than 14 days ago. To change the number of days Sitrion Social keeps this data, click "Configure Job Settings" in the Job Configuration settings section of the NewsGator Social Platform management page, then edit the Activity Retention field to the desired number of days, and click Save.

Reporting Data

> ⚠ While other retention settings are in days, note that the Reporting Data retention setting is in months.

The NewsGator reporting database replicates some of the data in the NewsGator social database each day in an overnight job. This data is useful for creating custom reports using your own reporting tools, and by doing so against the reporting database instead of against the social database, your reporting tools will not adversely impact users' social computing experience.

By default, data is kept in the reporting database for 24 months from the time it is first pulled in, before being purged. To change the number of months Sitrion Social keeps reporting data, click "Configure Job Settings" in the Job Configuration settings section of the NewsGator Social Platform management page, then edit the Reporting Data Retention field to the desired number of months, and click Save.

Activity notifications

Notification Retention

This is the number of days the NewsGator database will retain activity notifications.

`4`

Apart from alerting emails, each SharePoint user has a list of activity notifications accessible from within their Activity Stream web part. By default, Sitrion Social removes any such activity notifications that are more than 4 days old. To change the number of days Sitrion Social keeps activity notifications, click "Configure Job Settings" in the Job Configuration settings section of the NewsGator Social Platform management page, then edit the Notification Retention field to the desired number of days, and click Save.

> ⚠ The Notification Retention setting should never be greater than the Activity Retention setting. Doing so will lead to notifications that link to activity events that are no longer in the system.

Percentage of user profiles to process

Percentage of user profiles to process during digest job

This is the percentage of user profiles that will be processed during the run of an hourly digest job.

`5`

Among the Sitrion Social timer jobs is a job called "NewsGator Digest Job" that sends daily email digests to users. Each user receives a digest email customized for them, summarizing the last 24 hours' microblogging activity and tracked events across all that user's colleagues and communities. This job can be configured to run several times throughout the day, sending emails to only a portion of all users in the system on each run, until all the users in the system have received their email in the last 24 hours. This setting determines how big that portion is. At the default of 5 percent (pictured, with the job set to run once an hour), the job will complete sending digests to all users in 20 hours, and will likely have a period of 4 hours over which it sends no digest emails.

At the default timer setting of hourly, the ideal setting for this job is 5.

Colleague recommendation control

Number of user profiles to process during the recommendations job

This will determine the number of user profiles that will receive new colleague recommendations during the run of the daily recommendations job.

`500`

Because some environments contain very large numbers of user profiles, this control allows admins to limit the number of user profiles processed in each run of the colleague recommendation job.

Unanswered questions notifications job

Unanswered questions notification job

Q&A curators will receive a notification email for questions that have not been answered in the specified number of hours. Askers will receive a notification email prompting them to mark good answers after the specified number of hours.

Q&A curator notification time span in hours

`24`

Asker notification time span in hours

`24`

This job sends reminders both to curators (for questions which have not been answered) and to question askers (for questions where no answer has been marked as a good answer). These settings determine how long the job will wait for a question to remain unanswered before sending the notification to curators, and also how long the job will wait for a question with answers to have one marked as good before sending the notification to the asker. By default, the job runs each hour and the thresholds are set to 24 hours.

See **Answer Turnaround and Quality** below for a full explanation of these features.

Save Settings

When you are finished making changes to the settings on this page, be sure to click **Save** at the bottom.

License Configuration page

Configuration
Configure Farm Settings | Configure Job Settings | View/Edit License | Manage Global Q&A Settings |
External Social Sites Connections | Manage Administrator Permissions

The license key provided to you by NewsGator not only allows you to install and use Sitrion Social, but also determines how long you can use it, and how many users can use it. Use the License Configuration section to update your Sitrion Social license key, and check whether you are in compliance with your license.

Clicking "**View/Edit License**" opens a page that tells you when your license expires, and how many users you are licensed to have using Sitrion Social. To assist in determining whether you are in compliance with your license, it also tells you the number of users that have been active using Sitrion Social in the last 30, 60, 90, 180, and 365 days.

NOTE: There is no notification email sent by the system or message displayed in the activity stream if your number of active users exceeds your license profile count.

Active User Count License Report

NewsGator

Your license will expire on: Does not expire

You are licensed for Unlimited profiles.

Active user count in the last:

30 Days	60 Days	90 Days	180 Days	365 Days
107	110	114	121	124

[Update License] [Cancel]

Monthly Email

A monthly email report containing the above active user count license information will be sent on the first of each month to the email address saved below.

Send monthly email to: ▓▓▓▓▓@newsgator.com

[Save Email Address] [Test Email Address] [Cancel]

A user is considered "Active" for a date range if they have viewed any of the three default filters in the Activity Stream web part during that time range: My NewsFeed, Top News, or All Public Microblogs. As these are the only filters that may be used as the default for this web part, simply loading a page containing the Activity Stream web part will always update a user's active status. Accessing any of these filters from another UI, such as using the Sitrion Social Desktop application, will also update the user's active status.

If the end date of the license key is exceeded, the Activity Stream views throughout Sitrion Social will become disabled and will display a message to that effect, and nothing else. If you exceed the user limit of your license key, a notification will be displayed in Central Admin. If you are no longer in compliance, contact NewsGator for a new license key. You can update your license key after install without running the installer by clicking the Update License button on this page. This opens a dialog into which you may paste your new license key. Click Update to complete your license key update. The email does not include any special indication that the license count has been exceeded in any particular time range.

Some companies run Sitrion Social on an extranet where internal employees can interact easily with people from other companies. By entering the email domain of your internal users in the **Extranet User Exclusion** section, you can ensure the license counts shown above do not include any of your company's employees who are presumably licensed for Sitrion Social already, and only count external users.

Extranet User Exclusion

If this is an extranet environment enter the email domain of your internal users so they do not count towards your active users.

Email Domain: [   ]

[Save]

Manage Cache Settings page

The Manage Cache Settings page is accessible via a link on the Configuring Farm Settings page (see above):

Manage Cache Settings

Click on the link to manage cache settings. Cache settings apply to the local farm, and can be configured independently in a multi-farm configuration of Social Sites.

Manage Cache Settings

In the 2.x releases, Sitrion Social had the ability to use Memcached to store public stream items on distributed cache servers. That feature was subsequently discontinued. As of the 4.0 release, Sitrion Social is now supporting the use of the Microsoft AppFabric caching technology. This is intended to support the suggest ahead feature as well as improve overall performance of the default activity stream.

Cache Services Enabled

Select to enable caching services

SuggestAhead Caching
☐ Enable
Clear SuggestAhead Cache

Content Caching
☐ Enable
Clear Content Cache

The "SuggestAhead Caching" checkbox effectively activates or deactivates the Suggest Ahead feature (which shows you posts and questions that may be similar to the one you are still typing).

Check "Content Caching to cache the content in users' "My NewsFeed" filters in the Activity Stream web part.

Before you can enable the cache in Central Admin, you'll need to set up one or more cache servers and install the client on the farm servers.

Setting up the AppFabric Cache Server(s)

Download AppFabric 1.1 for Windows Server, which is available at http://www.microsoft.com/en-us/download/details.aspx?id=27115

We recommend that Appfabric Cache be installed on a server of its own with a minimum of 4 gigs of RAM.

Steps for installing Appfabric Caching Service on the Appfabric Cache Server

1. Open an administrator command prompt.

2. Run install: WindowsServerAppFabricSetup_x64.exe /gac /i CachingService

3. From Services set Startup Type for "AppFabric Caching Service" to Automatic

4. Start "AppFabric Caching Service" if not already. Startup may take a few minutes.

5. Open Caching Administration Windows Powershell

6. Start CacheClusters: Start-CacheCluster

7. Create NewsGator Cache: New-Cache -CacheName NewsGator (You can name the cache whatever you want - just record it, because you will need it later)

Installing the AppFabric Cache Clients

The Appfabric Cache Client must be installed on all farm servers that would access the cache. Steps for installing on these SharePoint Servers:

1. Open an administrator command prompt.

2. Run install: WindowsServerAppFabricSetup_x64.exe /gac /i CacheClient

If you do not see the following DLLs in the GAC after install:

- Microsoft.ApplicationServer.Caching.Client.dll
- Microsoft.ApplicationServer.Caching.Core.dll
- Microsoft.WindowsFabric.Common.dll
- Microsoft.WindowsFabric.Data.Common.dll

then you will need to add them manually to the GAC, after which a reboot of the server will be the easiest way to get Windows to recognize them. These DLLs can be retrieved from the AppFabric Program Files folder.

Sitrion Social Settings for AppFabric Caching

Now enter information that matches your cache configuration. If you used a different Cache Name be sure to use it here. Also enable the cache with either or both of the checkboxes at the top.

The next time the "NewsGator Suggest Ahead Builder Job" runs, the cache will be filled. You can get immediate results by manually running the job. You can also update the job frequency to every 15 minutes if you desire but we do not recommend running it more frequently than that.

In recent releases, additional controls have been added to allow you to fine-tine or troubleshoot cache performance. Each of these settings is fairly well explained in the UI. If you are attempting to setup and configure cache and these settings do not make sense, you should contact Sitrion Support.

The following sections were also added in recent releases and allow control of the client and the cache contents.

Finally, these settings were added to control security and transport communication properties.

Manage Global Q&A Settings page

Global Q&A curators

Each community can have people specified with a curator role to receive notifications. Clicking the Manage Global Q&A Settings link takes you to a page to specify people to receive notifications for questions which are not targeted at any communities and which have gone unanswered for the specified period of time. See **Answer Turnaround and Quality** below for a full explanation of the curation feature.

Use the people picker control to specify who will be your organization's global Q&A curators, then click "OK" to save.

Configuring the Expert Label

Members in communities can be designated as experts which gives them permission to mark answers as "good". Additionally, the expert label appears beside their name in answers to questions or comments on posts and a special expert icon appears with their profile picture.   Some environments prefer to not use the word "expert" as this carries a certain meaning or classification that is not intended by the system.   The Expert Label section allows the default to be overridden in the supported languages.

The example below shows that the default value for US English has been changed to "MVP".

To add one for French for example, specify an appropriate French label and select fr-FR for the culture. Click Add. (We would recommend using a short label as this will display beside a persons name on a post.)

The new French label will now replace the default French label.   Click Ok when finished adding expert labels for all relevant languages.   Labels can be deleted and will return to the default unless a new one is specified. Changing a label requires deleting and adding a new one.

External Sitrion Social Connections page

Click **External Social Sites Connections** to get to a page that enables you to connect an internal server running Sitrion Social with an external server running Sitrion Social.

For example, NewsGator has run an extranet server called "Engage" for quite a while. Having an isolated extranet server makes it much easier to work easily with customers and partners. This feature allows NewsGator employees to interact with Engage while working within the company's internal Sitrion Social environment. The diagram below illustrates the key concepts.
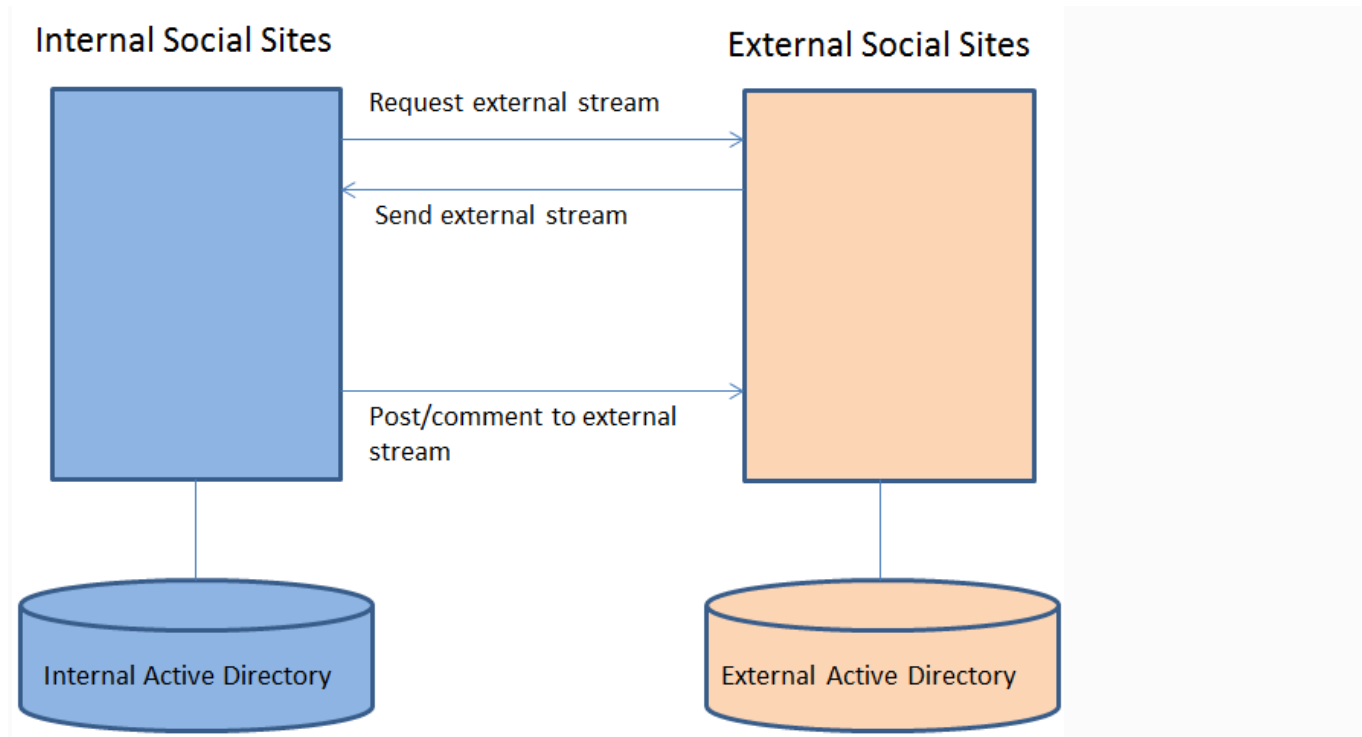
The user who is working on the internal Sitrion Social selects a filter (or tile) to view the activity stream on the external Sitrion Social. Based on configuration in Central Admin (detailed below), the requesting user's email address is securely sent to the external Sitrion Social. Based on passing the necessary security checks, the external Sitrion Social server sends back that user's activity stream data. The data is then displayed in the activity stream web part just like all other activity stream views. The user can comment, like, mark for follow-up, etc. and those actions are sent to the external server. Also, the user can choose to post when viewing this filter and the microblog will be posted on the external server. A limitation, however, is that file attachments cannot be included with any comment, answer, or post, nor are options available to add poll choices or a link to a SharePoint resource.

End users do not need to do any configuration to enable this. The only configuration steps are performed by the administrator in the **External Social Sites Connections** page.

On this screen, begin by adding a **Display Name** that will be used to identify the remote server's feed to the user in the Activity Stream web part's drop down filter. Add the URL of the remote server, using SSL by providing an URL beginning with "https" to ensure secure communication. Add the account name and password for the account to do the secure request from the external server. This account must have "Delegation and Impersonation" rights on the remote server's farm (see **Permissions for global capabilities** below for directions on granting this right to the account). The external server has to be configured to enable remote connections, after which the shared secret will be provided which must be entered on the consuming internal connection.

The Profile Property Mapping field is used to match a user's profile on the remote server to the same user's profile on the local server. WorkEmail is the default profile property used for this; profiles having the same WorkEmail property are considered to be the same person. You can change this so that the profile mapping is based on some other profile property. The selected field must be indexable by SharePoint search. Note that while most text fields should work, some text fields containing special characters like " – " may not return matches.

You may add as many connections to as many remote farms as you wish. Editing is not supported, however, you can delete a connection from the list of existing connections at the top of the page, and create the updated one instead.

The connections you have configured do not take effect until you check the **Enable remote connection** box at the bottom of the page, and click Save.

The two screenshots below give an example of how this can look. The first one shows a view where a user is actually logged into the extranet server and viewing the activity stream web part.
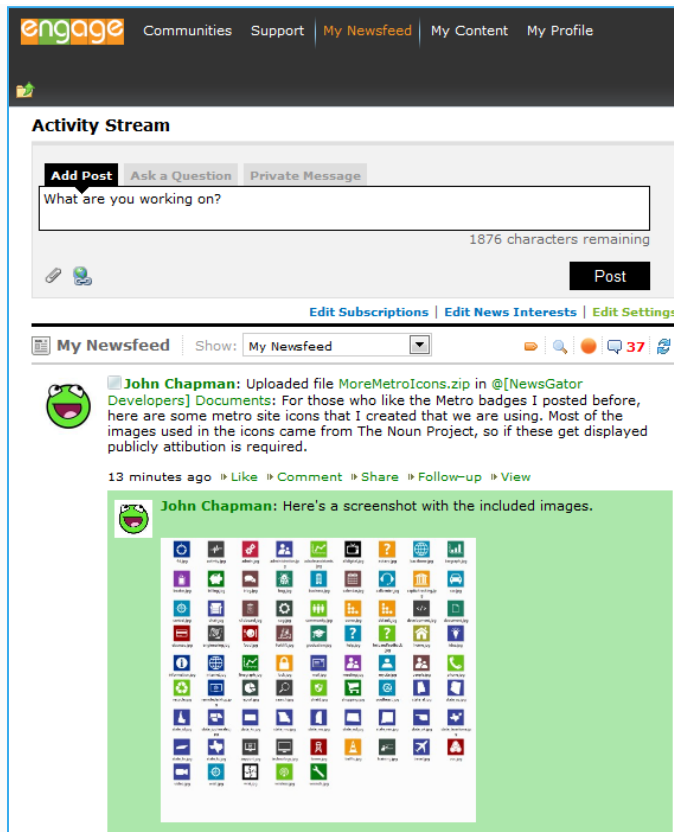
The screenshot below shows the same user looking at the activity stream web part on an internal server after selecting the extranet server in the "show" filter.
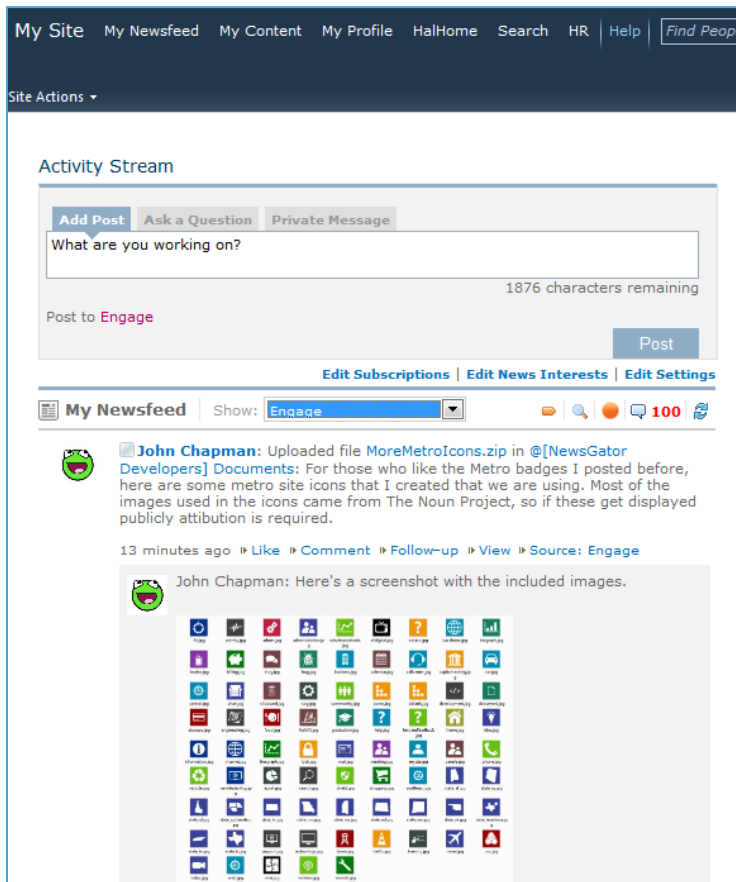
The same stream data is displayed here without the user needing to go to the external server.

Manage Administrator Permissions page

There are many distinct permissions for administering Sitrion Social that can be granted globally (see **Permissions for global capabilities** below for details). The UI in Central Administration for granting these permissions contains a people picker control for specifying the users who will receive admin permissions. Because the people picker control could not be used in Central Admin when companies were using claims backed by ADFS, setting permissions required workarounds. Beginning in version 3.5, the **Manage Administrator Permissions** page within the NewsGator Social Platform service allows picking users and applying permissions even if claims/ADFS is used.

The only additional step required when using this page is to specify at the top a web application that is associated with the Sitrion Social application. The choice of web application here is arbitrary, so long as it meets this condition.

For instructions on how to use the rest of this page, see the **Permissions for global capabilities** section below.

NOTE: The **Manage Cache Settings** page available from the Configuration section provides detailed control over AppFabric cache settings. Adjusting cache settings typically requires some experimentation and tuning to optimize for each customer environment. You can contact Sitrion for some pointers. For detailed AppFabric management information, please see Microsoft resources.

Email and Notifications section

Email and Notifications
Configure Email Settings | Customize Email Contents | Customize Notification and Digest Email Subjects |
Configure Lync Notification Settings | Exchange Settings

Configure Email Settings page

Click **Configure Email Settings** to get to a page for email infrastructure configuration.

Email Handler section

The Email Handler must be enabled for Sitrion Social to be able to receive and process inbound emails. Enabling this enables:

- Alert emails (that inform users of new microblog posts and questions of particular interest to them)
- Digest emails (that summarize the last day's activity stream for the user)
- Alert email replying (allowing users to comment or provide an answer by replying to the alert email)
- Posting a microblog or question by email

To use this last feature, see the section **Global Email Addresses for microblogging and asking questions**, below.

The Email Handler section will initially request a location to create a list. Clicking the Enable button will create the list, perform the necessary setup, and toggle the button to show the "Disable Internal Email Handling" option.

This Email Handler setting is the same as the Email List Website Location setting on the Installation Options Selection page of the installer. It is enabled during the Provision Social Service Application task in any install or upgrade of Sitrion Social.

These features use a set of SharePoint lists which may be located anywhere you desire within SharePoint. Simply add the URL of the site you choose in the Email Handler text box, then click Enable Email Features to enable inbound and outbound emailing features.

You may see a warning in the Email Handler section that the SharePoint Incoming Email feature is not enabled, or not configured correctly:

Warning: The SharePoint Incoming Email feature is not enabled, or not configured correctly. NewsGator Email Replies will not work until the SharePoint feature is configured.

Email Handler:http://squishy/my

[Delete Email Features]

If you see this warning, you can opt to delete email features using the button. If you don't, you must enable and properly configure SharePoint's built-in Incoming Email functionality in order for NewsGator's alert email replying feature to work, as it relies on this SharePoint feature. Configuring SharePoint Incoming Email is a complex topic; we recommend that you review Microsoft's Configure incoming e-mail (SharePoint Server 2010) documentation to help you through that process.

If you enabled this feature during install and you would like to turn it off, the button in this section will say "Delete Email Features". Click this to turn alert email replying off.

Override Notification Email Address section

Most customers will not need to use this section. Some customers need incoming emails to go to a different email address than the one that is created automatically by enabling the internal email handling. If you choose to click the checkbox and enter a new address, you will need to ensure that your email system will resolve that address back to the "Response" email address defined in the Email Aliases section. Otherwise, replies to notification emails will not create responses in Sitrion Social.

Notification Email Friendly Name section

This allows administrators to specify a name to appear as the sender for notification emails. If nothing is set here, the display name of the user who took the action will be used (this is the default).

Email Aliases section

This section allows you to specify different aliases for emails coming into SharePoint and Sitrion Social. You might use this if you wanted to create a shorter email address like mb@mycompany.com instead of microblog@mycompany.com

Email Settings section

Email digests will by default appear to have been sent by the user receiving the email. If this is undesired, enter a valid email address in the text box at the top of the Email Settings section, and future digest emails will appear to have come from this address instead.

All email notifications are disabled by default. Users can individually enable notification or digest email outputs. In Central Administration, two settings let administrators enable email notifications for all users if desired. Opting in will set all users who have never saved a preference in their user profile.

A user who has saved her profile with these options turned off before opt-in was enabled or who chooses to uncheck these settings on the profile after opt-in was enabled will be opted out and will not not get email notification even if the central opt-in settings are enabled.

NOTE: As of the 5.2 release, the opt-in settings have been reworked as described below.

The two pull-down settings will automatically turn on digest or instant email notifications for all new users respectively. This causes the functionality to start running as soon as the user is created. Users can turn these off as well as adjust specific behaviors (e.g. time of digest email, specific kinds of notifications). If the checkbox below the pull-down is selected, the setting is immediately applied to all users (including existing ones) when Save is clicked on this page. So if you wanted to ensure that all users had digest enabled and all new users have it enabled by default, you would select Yes and click the first checkbox.

The settings can work the opposite way to disable emails. If you set a pull-down to "No", new users will not have these features on by default. And if you check the box below a pull-down set to "No", you will turn off that functionality for all users when you click Save.

Daily Digest Content Limiting

Starting in the 5.2 release, it is possible for administrators to control what content is in the daily digest for users.

The daily digest before version 5.2 included all posts that were made within the last day or that got comments added within the last day. For some companies, this is a problem because some posts continue to get comments for many days which leads to large digest emails that are difficult for users to read. This feature allows an administrator to set a time limit for the creation date of a post. So now, all digest emails can be set to include only posts created within the last day, last 1.5 days, last 2 days, etc. The setting for this in Email Settings.
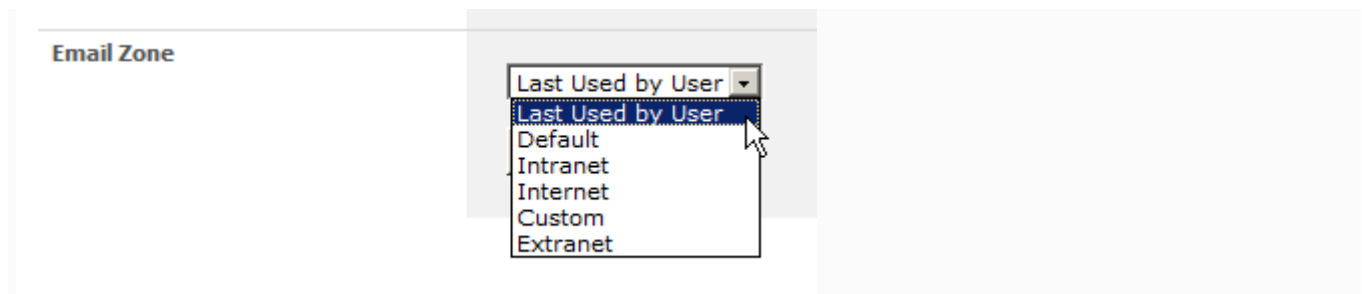
Email Zone section

The Email Zone section allows you to set what Alternate Access Mapping (AAM) zone is used in the URLs of links that are shown digest and notification emails. If your organization does not use AAM, you can leave this on one of the first two options, "Last Used by User" or "Default".

To have the URLs of links in digest and notification emails be the same for all users, select the AAM zone to be used in all email from among the last 5 choices - "Default", "Intranet", "Internet", "Custom", or "Extranet". Click Save to finalize your choice.

If using the same AAM zone in all users' emails will not work for your organization, select "Last Used by User", then click Save. With this option selected, Sitrion Social will keep track of, for each user, which AAM zone they used for accessing the Activity Stream web part, the last time they viewed it. It will use this recorded zone when constructing links in the digest and notifications emails that are sent to that user.

Embedded Images

When this setting is checked, images embedded in emails will be saved into SharePoint libraries and attempt to be shown within the body of the post created from the email in the stream.

Customize Email Contents page

The appearance of the emails generated by Sitrion Social can be customized to meet your business needs. The customization is done by modifying the XSLT files which Sitrion Social uses to format the data and add text to the output.

Note that once customized, upon upgrading to a future release, you will not automatically get new digest email features that NewsGator may add in that future release, because your customized XSLT will remain in use. You can remedy this after upgrade and get the new features by one of two methods:

1. Download the new standard XSLT using the **"Download XSLT"** button (see below) and apply your customizations to that;
2. Modify your existing customized XSLT according to the instructions in the Install Guide, **Updating (Upgrading) Sitrion Social** section, **Next Steps** subsection. Look for the entries titled **"If you upgraded from ... and had a customized Email Digest template"**.

To begin the customizing process, lick **Customize Email Contents** to get to the management screen pictured below:

Note that there are three types of email that you can customize on this page: **Activity Update** (also referred to as Instant Notification Email in some documentation); **Activity Digest** (sometimes referred to as the email digest or the digest email); and **News Stream Digest** (a digest available only if you have the optional News Stream module, containing news articles matching your RSS subscriptions and news interests). You can only customize one of these types of email at a time, so be sure to have selected the type you want to change in the **Email Type** dropdown at the top of this page.

All email types start with default templates for each of the supported languages. If you want to make a change to an email that needs to be repeated in all languages (e.g., change some default text), you will need to upload customized templates for each language you support.

The typical process for editing a template is:

1) Choose on this page which email type you wish to customize.
2) Use the Download XML button to get sample data (this is optional – you will only need this for changes related to transforming the data)
3) Use the Download XSLT button to get the default XSLT. This provides a starting point for your changes.
4) Edit the XSLT.
5) Upload your new XSLT to preview and ensure the output looks correct, using steps 1 and 2 in the Upload Template section.
6) Using steps 3 and 4 in the Upload Template section, save the uploaded new XSLT under the appropriate language (local).

Configurable Email Subjects

This feature allows administrators to choose the specific text in the subject for notification and digest emails. This is helpful for branding of the communications and fit with company culture. This also allows previewing the first message in a conversation within the subject line of notification emails regarding that conversation. The administration for this allows specifying text for each different language. The page for controlling this is accessed by clicking **Customize Notification and Digest Email Subjects** in the Email and Notifications section.

Note: As of the 5.4 release, new subjects exist for the new notification types (community blog, discussion and idea).

On this page, each type of email output is listed (for each language supported) along with the default pattern for the subject.

Customize Digest and Notification email subjects according to this legend:

Click Edit to create a Custom Value. Your Custom Value may include any of the replacement tokens {bracketed words} shown below that appear in the Original Value column for that row of the email subject you are customizing.
{ActivityText}: This gets replaced with a summary from the post itself, including hashtags.
{Date} - This gets replaced with the date in a culture-specific long date format, such as 2/23/2014 12:49:49 PM.
{Community} - This gets replaced with the name of the community in which the event occurred.
{OriginalUser} - This gets replaced with the name of the user who published the original event.
{User} - This gets replaced with the name of the acting user.

Filter By Culture: English (United States)

		Culture	Name	Custom Value	Original Value
Clear	Edit	en-US	DigestEmailSubject	Hal: Your Stream Summary for {Date}	Daily Activity Stream Summary: {Date}
Save	Cancel	en-US	EventNotificationAnsweredQuestion	Hal: {User} answered your question. Starting text:	{User} answered your question. Starting text: {ActivityText}
Clear	Edit	en-US	EventNotificationAnsweredSubscribedQuestion		{User} answered a question by {OriginalUser}. Starting text: {ActivityText}
Clear	Edit	en-US	EventNotificationAnsweredSubscribedQuestionNoPublisher		{User} answered a question. Starting text: {ActivityText}

Choosing "Edit" allows the admin to specify custom text. In the example above, the word "HAL" is being added to the front of the subjects as a way to distinguish from where the email originated. (Inside NewsGator, our intranet is called "HAL" and it's very helpful for us to differentiate these emails from emails coming from test or demo environments.) As pictured, the admin has clicked the "Edit" link in the second column of the row being edited, which has changed the first two links in that row to "Save" and "Cancel", and has opened an edit box in the Custom Value field with the "Original Value" text already populating it. The admin has then typed "Hal: " in front of the existing text, and is now about to click the "Save" link in the first column to commit these changes.

The replacement tokens {ActivityText}, {Date}, {Community}, {OriginalUser}, and {User} allow specifying parts of the subject line that change from email to email. You may not add any replacement tokens to your custom value that are not already used in the Original Value, as Sitrion Social won't know what to replace them with. You may, however, leave out any that you don't want to use (prior to version 4.0, you were required to use all the same ones that appear in the Original Value).

The {ActivityText} token only applies to instant notification emails and not to email digests. It applies to both instant notification emails and instant notifications received in the web UI, via the "bell" icon on the Activity Stream web part. It behaves a little differently in each place, showing more characters in the web UI than in email subject lines.

In notification email subject lines, the {ActivityText} token is replaced by the first 50 characters of the activity stream item, though ensuring to not break up words. This provides some indication to users as to the topic of the conversation. This is followed by up to 50 characters in hashtags, using the first 10 hashtags that aren't included in the first 50 characters.   For example, when configured like this:

Name	Custom Value
DigestEmailSubject	HAL Daily Activity Stream Summary: {Date}
EventNotificationAnsweredQuestion	{User} answered your question. Hal > {ActivityText}

… an email notification alerting to somebody answering your question may appear as follows:

In notifications in the web UI, the {ActivityText} token is replaced by the first 250 characters of the activity stream item, though ensuring to not break up words.

As of the 5.1 release, there is now a "{ReplyText}" token that can be used. This is appropriate for notifications based on comments and answers. This will show the starting text of the comment or answer when the subject is created.

Lync Notifications feature

Important Note: As of May 2015, this feature is no longer supported.

Exchange Settings page

To configure the optional email, calendar and task tiles in Lookout or to enable the ability for "follow-up" items to automatically become tasks, the connection to Exchange must be configured in the "Exchange Settings" portion of the Email and Notifications administration section.

> **Note**: Social Sites' Exchange integration features will only work for users that have a SIP in their user profile. For this reason, these features won't work in Forms-Base Auth (FBA) environments, but should work in ADFS environments.

Preparatory steps for Exchange Integration

Prior to configuring Sitrion Social's connection to Exchange, you may need to complete the following two preparatory steps to allow SharePoint the access it needs to Exchange:

1. If SSL is configured on the Exchange server for web service access, install into SharePoint the root authority certificate(s) for the issuer of the Exchange server SSL certificate.
2. Provide SharePoint with credentials needed for making web service calls to Exchange.

Here are the specific steps necessary to accomplish these two preparatory tasks:

1. *Install Exchange, root authority, and other certificates into SharePoint*
   By default, SharePoint has no root authority certificates installed. If SSL is configured on the Exchange server for web service access, the root authority certificate for the issuer of the Exchange server SSL certificate must be installed into SharePoint. The steps for this are broken down into two parts here: get the certificates, and install the certificates into SharePoint.

   Get the Certificates:
   A. On the SharePoint server, open Internet Explorer and browse to the Exchange Webmail URL.
   B. Near the Address Bar, click the Lock icon and select **View Certificates.**
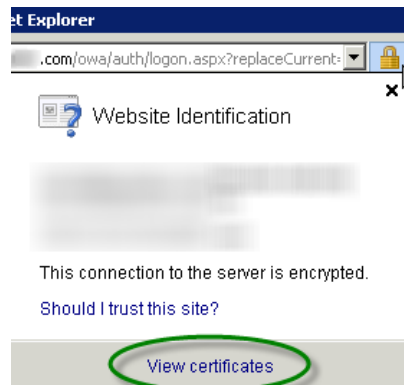
   C. In the Certificate popup, select the **Details** tab.
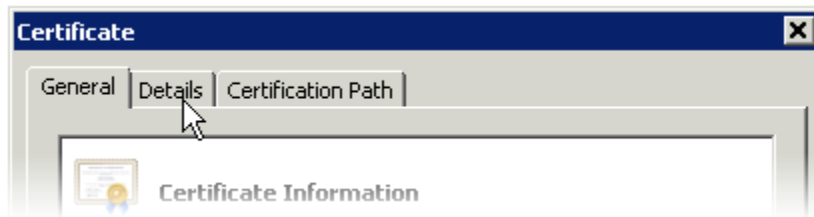
D. On the Details tab, click **Copy to File….**
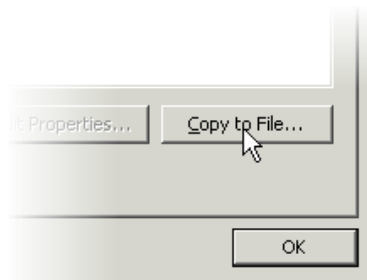
E. Export the certificate in the "DER encoded binary X.509 (.CER)" format to somewhere easily accessible.

F. Click the **Certification Path** tab.
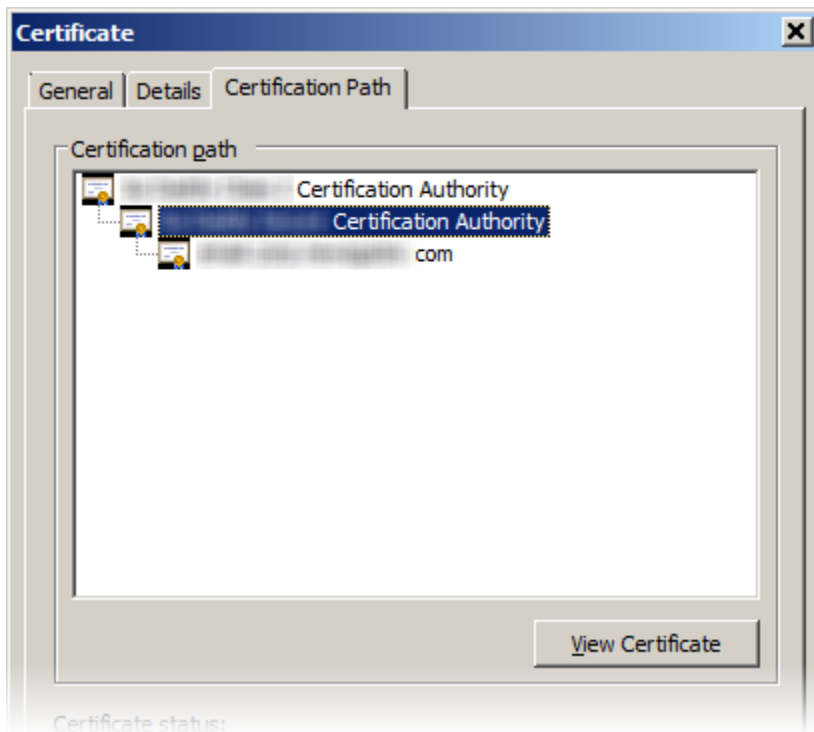
G. You've already exported the one listed on the bottom here. Click each of the other certificates in turn, clicking the **View Certificate** button for each when selected. New versions of the Certificate dialog should open for each.

H. Repeat steps C through E in each of the other certificate windows. You now have all the certs you'll need to install to SharePoint. Close all your certificate windows when done.

Install the Certificates:
A. Open SharePoint Central Administration

B. Go to Security > General Security and click **Manage Trust**
C. In the Ribbon, select **New.** The **Establish Trust Relationship** dialog appears:
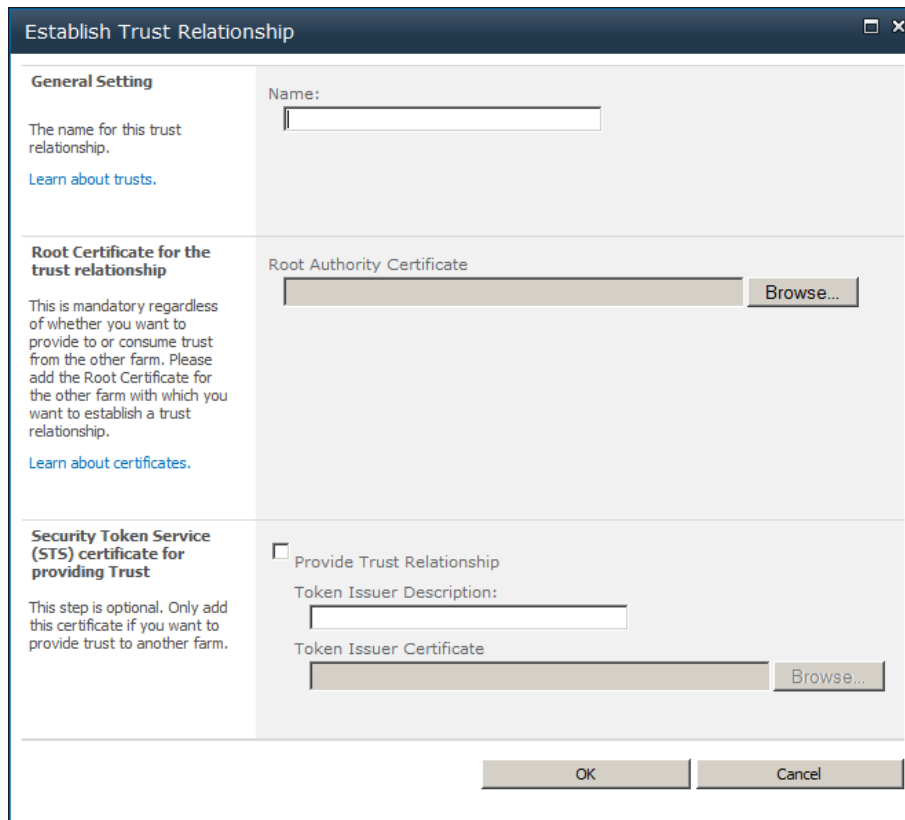
D. At the top, give the relationship a name.
E. In the next section, browse to the root certificate you exported above.
F. Leave the rest as is, and click **OK**.
G. Do this as well for all the other certificates you exported above. When finished, it should look similar to this:
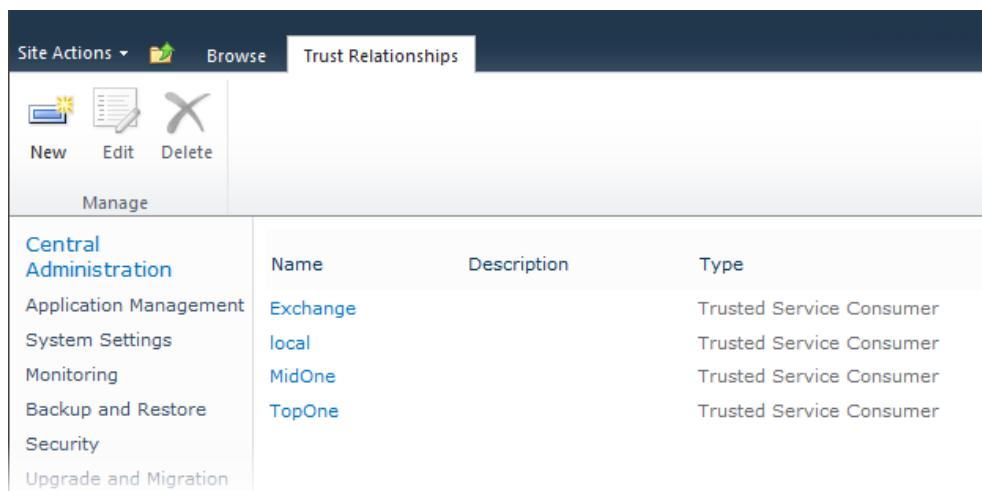
1) *Add credentials to the Secure Store Service Application*
Since the Exchange Managed API is making web service calls from the SharePoint backend, credentials must be explicitly provided when needed (they cannot be passed through from the current user's credentials), and therefore

must be stored in the Secure Store. In order for these credentials to work in production, the account provided must have Exchange Impersonation rights. It is recommended that you create a new Active Directory service account to be used exclusively for this purpose.

Set up service account:

A. A domain administrator will need to create a service account in Active Directory.
B. An Exchange administrator will need to open either the Exchange Management Console or the Exchange Control Panel (if your organization uses Exchange Server 2010) or the Exchange Administration Center (if your organization uses Exchange Server 2013).
C. Add the ApplicationImpersonation role to the service account. One way to do this is by creating a role group with the ApplicationImpersonation role, and with the service account as a member of the group.

Install the Certificates:

A. Open Central Administration.
B. Go to Application Management > Manage Service Applications and click the link for Secure Store Service (or whatever custom name you may have given yours).
C. If you have not yet generated an encryption key, it will ask you to Generate New Key on the ribbon.
D. Select New on the ribbon.
E. Enter a Target Application ID, something like "MyCompanyExchange". Take note of this because you will use this later when configuring the Exchange integration.
F. Set the Target Application Type to "Group".
G. On the fields page, leave "Windows User Name" and "Windows Password" as they are and click Add Field. For the new field set the name to "Windows Domain" and type to "Generic". (The field names must be like this and are case sensitive).
H. On the next page, set the Administrator to an account (usually the farm administrator) that will have the ability to change the credentials of the service account you'll use for Exchange impersonation, which you set up in the previous section. Set as the Members a group representing your Sitrion Social users … or at least those users who are to be able to use any of the Exchange integration features available in Sitrion Social.
I. After the Target Application is created, select the drop down menu on your target application and select Set Credentials.
J. Set the user name, password, and domain of the service account you created for Exchange Impersonation.
K. Select OK

Enabling Exchange Integration in Sitrion Social

With the above preparatory steps completed, you are ready to provide Sitrion Social the information it needs for Exchange integration. Click "Exchange Settings" on the NewsGator Social Platform Service Management page:

This opens the Exchange settings page:

- Check the top checkbox to enable the entire integration and start seeing Exchange email, calendar items, contacts, and tasks within Lookout and Lookout360. You can easily stop this exchange of data later by simply unchecking this box.
- Set the Target Application ID to the one you created in the "*Add credentials to the Secure Store Service Application*" preparatory step above (e.g. MyCompanyExchange).
- Set the Exchange Server compatibility version (e.g. Exchange2010_RTM)
- Enable Autodiscovery
- Add the web service URL

Click **Save** when done to commit your changes.

Enabling Automatic Creation of Exchange Tasks from Stream Items Marked for Follow-up

Checking the "Enable Follow-Up Task Creation" box at the bottom of the Exchange Settings page will cause an Exchange task to be created for the user when she flags a stream item for follow-up by clicking its "Follow-up" link. Un-selecting the "follow-up" flag in Sitrion Social causes the corresponding task to be marked as completed in Exchange.

Community and Spheres section

Managing the Public Community Members group

As of version 2.0, Sitrion Social allows you to specify what security principals should represent your "public" access. This is done in Central Admin in the NewsGator Social Platform Services management. The security principals you specify become part of a SharePoint group called **Public Community Members**. When a public community is created, this group is automatically added with read privileges. The creator can also easily opt to add this SharePoint permission group with contribute privileges, in addition to granting it permission using the normal SharePoint methods.

On installation, this group contains, by default, the highest level public principals that apply on your server. To change which security principals comprise this group, click **Manage Public Community Members** in the Community and Spheres section of the NewsGator Social Platform Management page.

This opens an edit box displaying the current security principals that comprise the Public Community Members group:
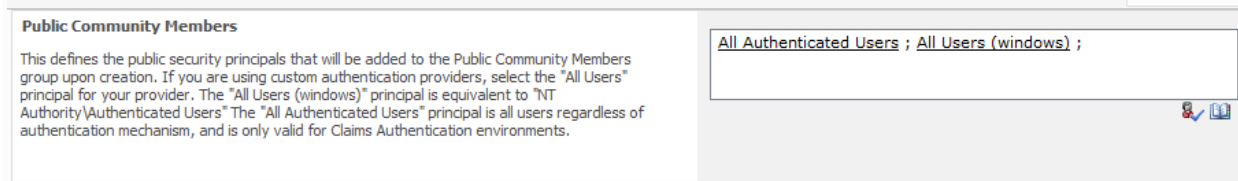
If you are using custom authentication providers, make sure you have in this box the principal that, for your provider, represents All Users. The "All Users (windows)" principal is equivalent to "NT Authority\Authenticated Users". The "All Authenticated Users" principal is all users regardless of authentication mechanism, and is only valid for Claims Authentication environments.

When adding principals to this list, these additions will also be automatically made in all existing instances of the Public Community Members group in existing site collections and sites. Removal of principals from this list will not be synchronized to existing instances of the Public Community Members group, and so if desired, removal of the principal from existing instances the group will have to be repeated manually in each site collection.

Managing Community Templates

Community and Spheres
Manage Public Community Members   Manage Community Templates   Configure Sphere Settings |
Merge Sphere Data Into Community

Saving an existing Sitrion Social community as a SharePoint site template will not work properly as a means of creating new communities. Sitrion Social instead provides its own means for creating templates for new Sitrion Social communities. This capability is found on the Manage Community Templates page, by clicking **Manage Community Templates** in the Community and Spheres section of the NewsGator Social Platform Management page. With a community template, you can pre-define what lists and tabs will be a part of a new community, and in what order.

Templates

Use the list to the right to configure the community templates.

Name	Date Created	Date Updated	Actions
Project	4/6/2011 8:13:00 AM		
Fun	4/8/2011 11:03:00 AM		
Department	4/8/2011 12:35:00 PM		
Standard	4/20/2011 4:57:00 PM		

Create New Template

Options

Use these options to configure the template requirements.

☐ All communities must use a template (only applies to new communities)
☑ Allow communities to change templates

The top checkbox in Options determines if all new communities must use a template. The lower checkbox determines if a community admin can switch to a different template after the community is created.

Clicking the "Create New Template" link will open up a screen that starts by letting you name and describe the template.

Name your template

Give your template a short and clear name, add an optional description, and select the intended language for the template.

Name:

Description:

Language: en-US

The next section lets you choose a template and configure settings for the Overview tab (if your template has one).

The bottom section allows you to control navigation links and to specify what lists (and corresponding tabs if your template uses tabs) will be in the community to start. It also allows specifying features that will be activated automatically when the community is created.

Disable SharePoint Quick Launch: This simply enables or disables the SharePoint quick launch (left navigation). This is a property on the SPWeb and can be modified through other standard ways as well (i.e. Site Settings > Tree View)

Replace SharePoint Top Links with Community Tabs:

- o If on 2010 and using our NewsGatorSkin masterpage: When on, this simply enables our tab control. When off, the traditional SharePoint header navigation is restored and can be managed using the standard SharePoint navigation controls
- o If on 2013 or on 2010 and NOT using the NewsGatorSkin masterpage: When on, the links in the traditional SharePoint header navigation are replaced with the links to the community tabs (still looks like SharePoint, just our community tabs are the links displayed instead of SharePoint's). When off, the header navigation links are managed by SharePoint.

To add a tab, select the type in the pulldown.

Then select the appropriate secondary choices (such as list type if you picked a list) and click Save

When you are done adding tabs and adjusting the order, make sure you click the Save Template button at the bottom of the screen.

Setting up Sitrion Social Spheres
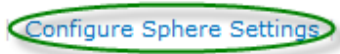
Spheres is an optional feature. Spheres allow conversations around a particular topic or with a particular group of people without the need for a community site to be created. You can choose to allow all users to create spheres on their own, which gives users a way to determine exactly who does and who does not get to be part of the conversation. Or you can opt to limit Sphere creation to a group of people whom you specify individually.

Spheres are much like communities without sites - they consist basically of a group of people and a topic. Like communities, they can be followed and unfollowed. They can be made public or private. They can be found the same way communities are found, listed among them in the Communities web part, or selected from the drop-down filter in the Activity Stream web part. They will be listed among the @-target autocomplete options for those who follow them. Clicking the name of the sphere in an activity stream item will even display a sphere view, where users can target new microblogs or questions to the sphere, respond to existing microblogs or questions, view the people following this sphere, choose to receive notifications for that Sphere, and choose to follow or stop following the sphere. An example of what the sphere view looks like:

To enable the Spheres feature, click the **Configure Sphere Settings** link in the Community and Spheres section of the NewsGator Social Platform Management page. This brings up a page with three option settings:

Check **Allow internal spheres** to enable use of spheres in your organization.

By default, all users will be able to create spheres. To restrict Sphere creation to a group of people you specify, uncheck **All users can create spheres**. When you do this, a People Picker control will appear, as pictured below. Use it to identify to Sitrion Social which users will have the right to create spheres.

NOTE: Glassboard integration is no longer supported. It is unlikely any of your users were using Glassboard integration, but you can choose to display a message to them to let them know it is no longer an option.

Click **Save** to commit all changes.

Creating and Following Spheres

When Spheres are allowed, the Communities web part gets a new link in addition to the sphere icon being added to the Activity Stream web part.

Clicking either the link or the icon in the Activity Stream web part displays a tabbed screen to allow management, discovery and potentially creation of spheres.

The Manage tab allows any user to easily stop following a sphere they have previously chosen to follow. If a user owns (created) any spheres, additional options are shown. The red "X" allows the owner to delete a sphere. This will cause it to stop displaying in any menu and stop letting users target messages to it. The data created in that sphere is not removed from the system. The "people" icon will allow an owner to edit the membership of a private sphere.

The "email" icon allows the admin to invite others to follow a sphere by creating an email like the one shown below.
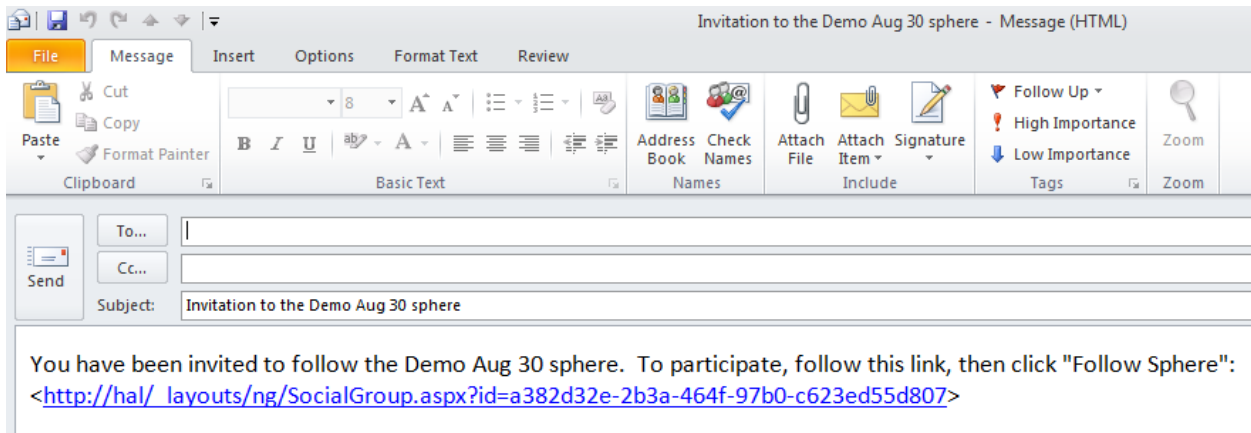
The Discover tab allows users view the Public spheres and choose to follow or stop following them. It also provides a search tool so users can find them by name.

The Create tab will only display for users who have the right to create to new spheres.

Creating Public Spheres

To create a public sphere, the user only needs to enter a name and click Create.
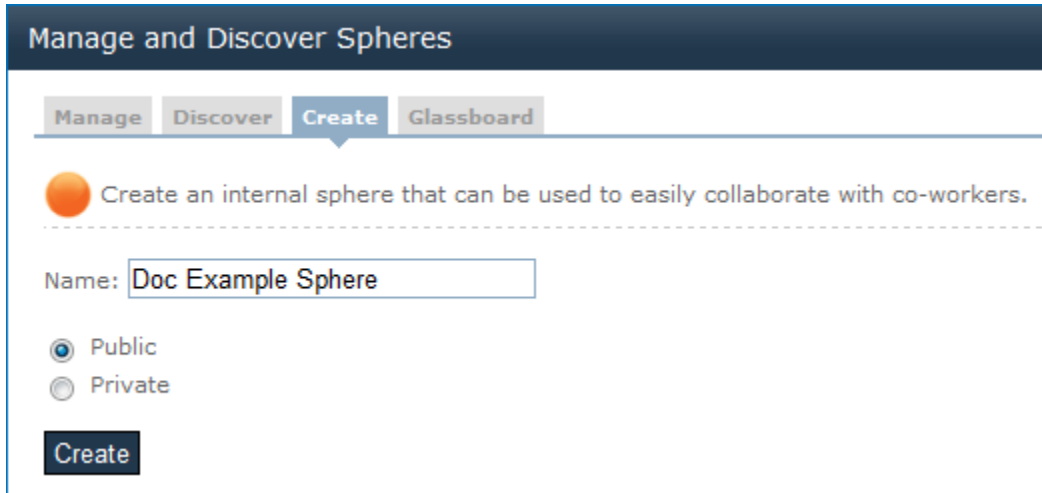
The screen responds with a successful creation message and the option to send email invitations.
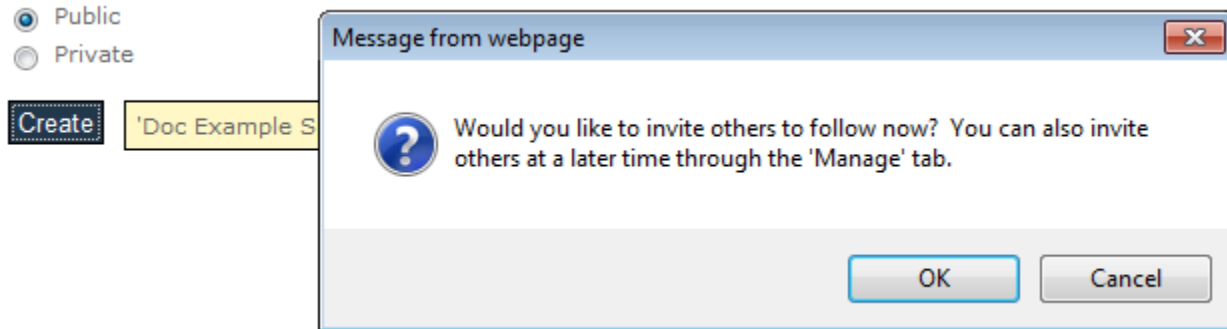
Clicking OK opens an email that makes it easy to invite others to join the Sphere.
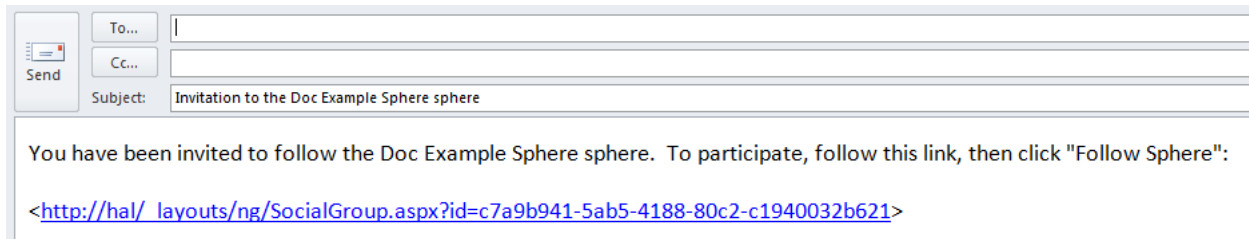
Creating Private Spheres

Creating a private sphere starts in exactly the same way.

In this case, however, the screen prompts you to add members to the sphere. Only the owner can add members to a private sphere.

After you have added the members you want, click the "Save" button. Private spheres will be visible in the "Manage" tab.

Activity Stream Glassboard Functionality

NOTE: As of SecondGear Software's acquisition of Glassboard from NewsGator in 2013, this functionality is no longer supported.

Merge Sphere Data Into Community

You may want to merge the conversation from a sphere into a community when that sphere has reached the end of its use (e.g. a sphere used for a project). Alternatively, you may have a sphere that is getting a lot of use and there is a need for additional functionality that comes with a community (document storage, wiki, discussion board, etc.). To merge the conversation from a sphere into a community, you need to first have a destination community created.

From the Merge Sphere Data Into Community screen, you select the sphere whose data you want merged. Then you select the target community into which you want to merge the data. If you pick a private community to merge the data into, you'll be asked to decide whether you want to give the sphere members access within the private community as shown below.

If you select a public community, the screen looks like this.

Upon completion a status message is displayed.

At this point, the sphere is no longer a valid @ target.
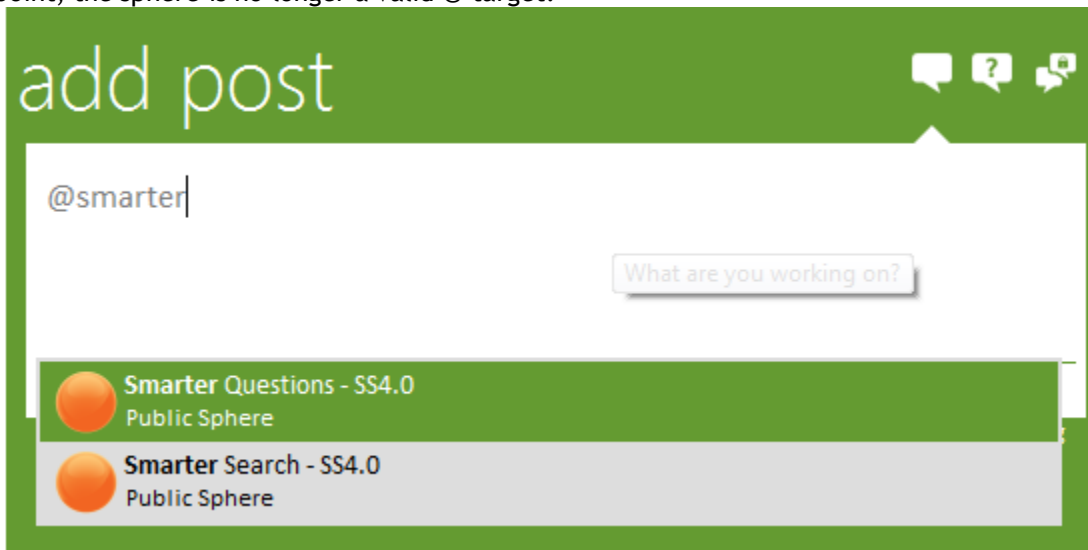
Should a user manually target the sphere by typing in the full @ name, the post will be automatically sent to the community as shown below.
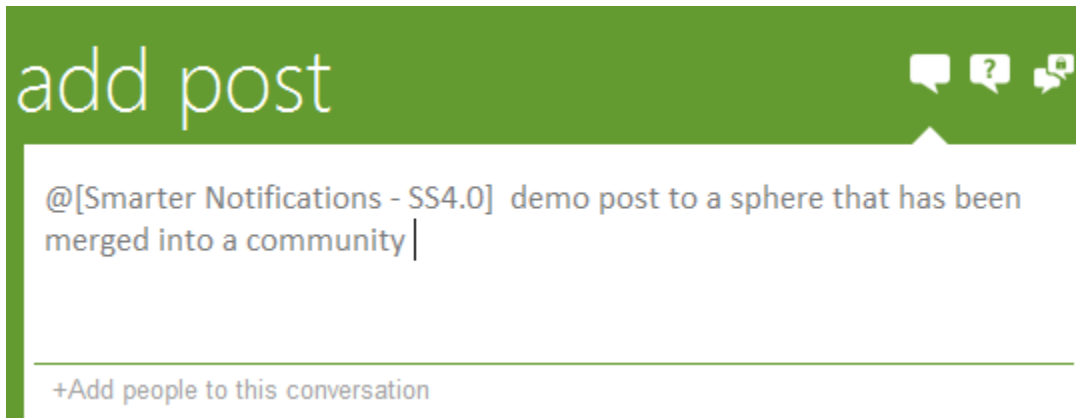
The sphere name typed in by the user still displays in the stream item to give context. Clicking on the sphere name when it is linked will now bring users to the community.
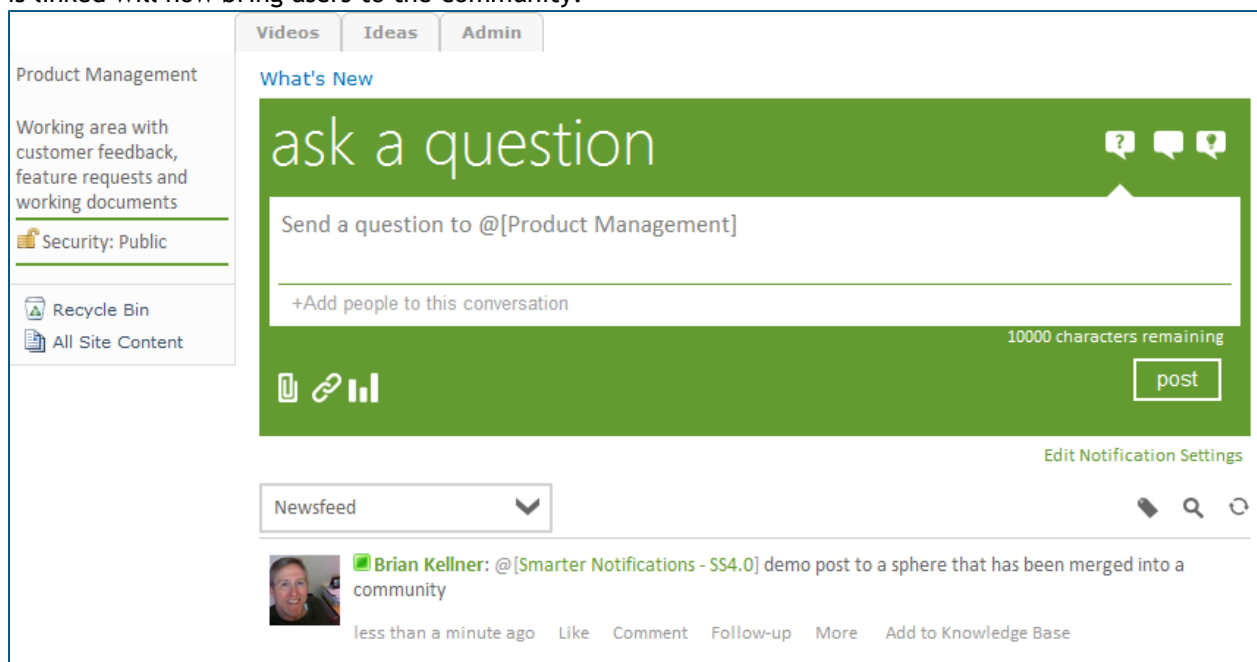
Data created in the sphere will not be counted toward community reporting or badging totals.

Debug section

Debug

- NewsGator User Profile Properties: Provisioned
- Activities have been provisioned in the SharePoint social platform.
- Database connection: Data Source=SQUISHY;Initial Catalog=NewsGator_SocialServices;Integrated Security=True;Enlist=False;Connect Timeout=15
- Report Database connection: Data Source=SQUISHY;Initial Catalog=NewsGator_Reporting;Integrated Security=True;Enlist=False;Connect Timeout=15
- Debug from backend proxy:Successful response from backend service application! Activities have been provisioned in the SharePoint social platform.

The debug section should be referenced when you see errors that cause you to suspect Sitrion Social is not able to connect to its social database, its reporting database, or its service application. Above is a depiction of the kinds of information and messages you'll see when these connections are all working; the databases are displaying their connection strings, and the service application proxy ("backend proxy") has a message indicating it responded. If these don't show, you are having a connection problem.

If the backend proxy is not responding, you may be able to fix it by following the instructions in the section above in this document titled "Service Application Proxy section".

Community Functionality

Communities allow collaboration around specific projects and topics, combining SharePoint list and library functionality with social streams in one place. Create public communities for open sharing across the company or private communities for select groups. Administrative reporting allows tracking of activity within the community.

Creating a community

In Sitrion Social, it is highly recommended to create all communities as sites and not as site collections. There are a few reasons for this:

- There is not a way to apply a community template to a site collection community.
- Community rollup capabilities work within a site collection but not across site collections.
- There have been some defects associated only with site collection communities, such as deleted ones still showing in web parts that list communities, and the Latest Blog Posts web part displaying bad links only when placed on a site collection community.

Instructions for creating communites by each of three means follow: by creating a new site, by creating a new site collection, and by converting an existing site.

Note on permissions inheritance

⚠️ *Warning*

> *Converting an existing site to a community will cause inheritance of permissions, if in use, to be broken.*

Every community is created with unique permissions - community sites, by default, do not inherit permissions from their parents. This is done because otherwise, users who are members of the top-level site in a site collection would be automatically made to follow every community created in the site collection. As a consequence, any existing site that inherits permissions from its parent that is then converted to a community by activating the NewsGator Community Web site feature will have that permissions inheritance broken. Administrators can manually re-establish permissions inheritance in such cases, if desired.

Converting an existing site into a community

A non-community site can be converted into a community using the Community Web feature. Start by going to the Site Settings menu for the site.
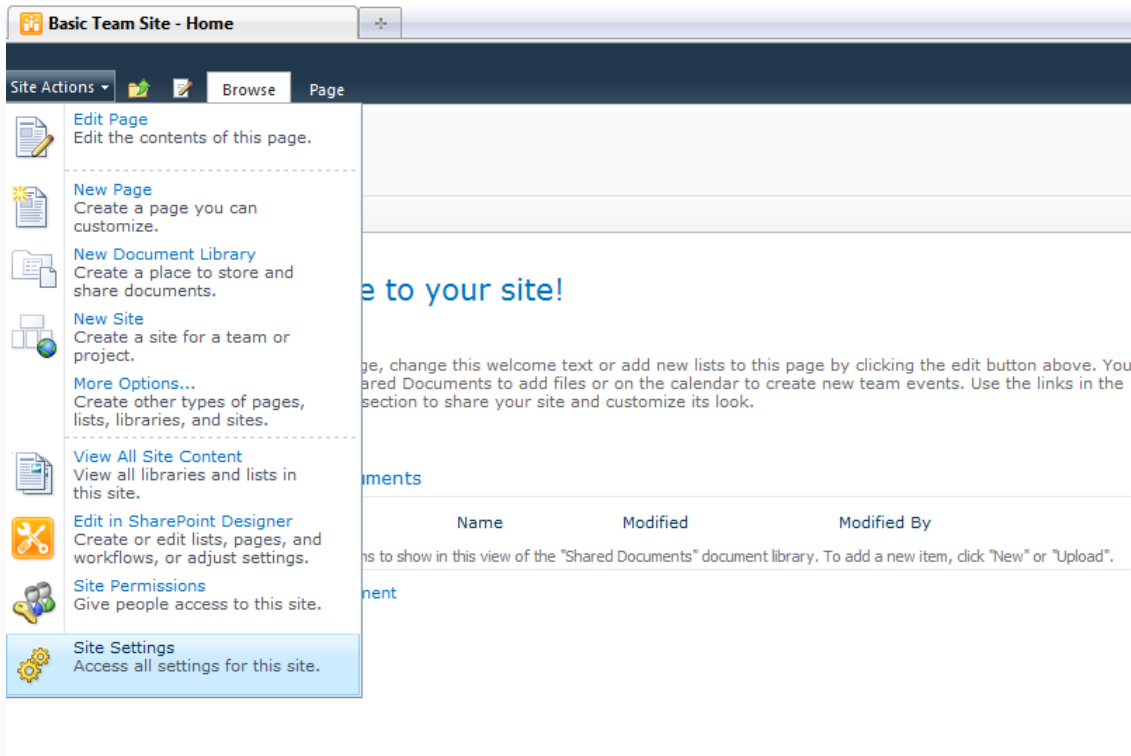
From here, click the Manage Site Features link.
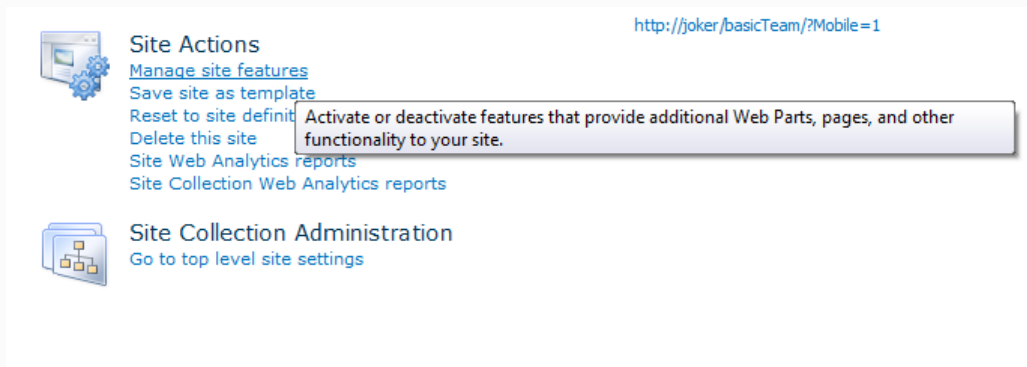
Activate the NewsGator Community Web feature. This will automatically activate the Web Context feature and the Social Newsfeed Integration feature. These are infrastructural features to capture events. More details on activating these features independently is provided in the Sitrion Social Administration Guide.
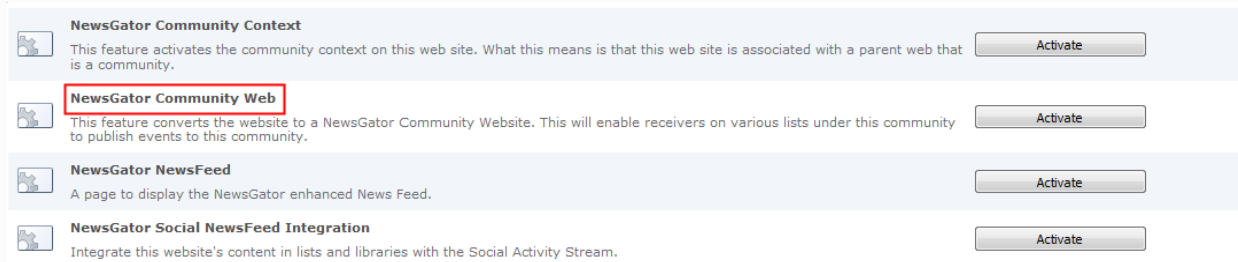
After this feature is active, the follow/stop following control and activity stream are automatically added to the front page of the team site.
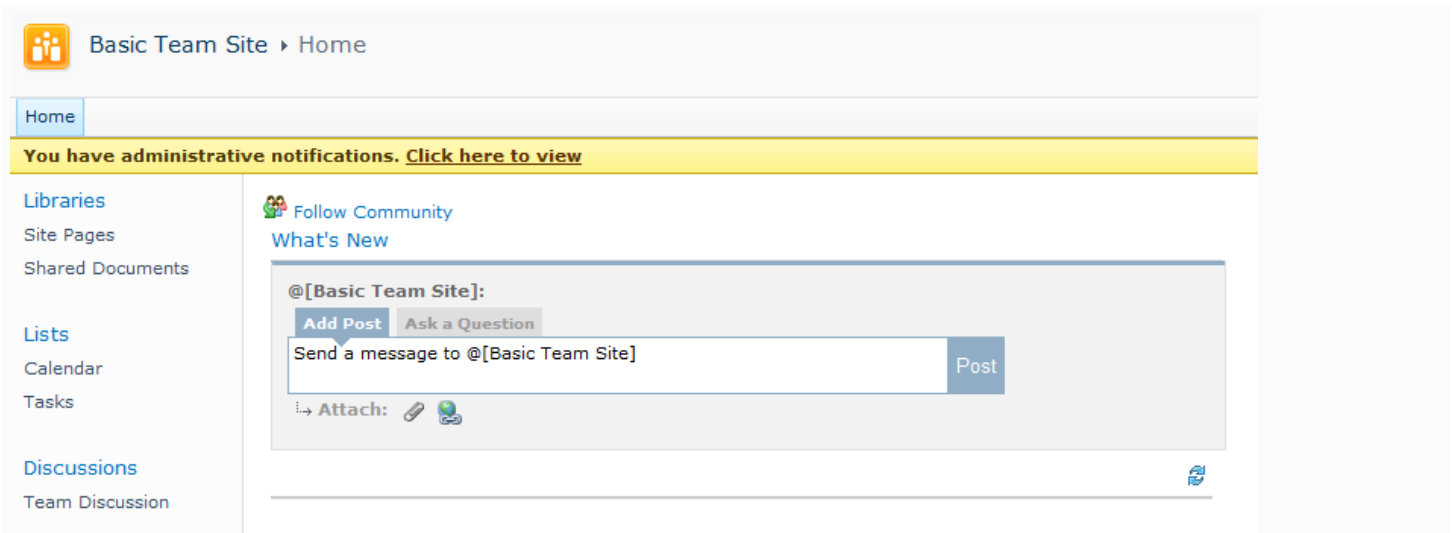
Any notifications will be displayed to site owners in the yellow message bar. Admins can customize the layout and add the community members part if thumbnails and access to a members page is desired.

Also, a link is included in the Site Settings page to get to a community administration page that provides the same functionality as the Admin tab does in a community created through the wizard and utilizing the NewsGator Master Page (see **Creating and setting up a brand new public community (site-level),** below).
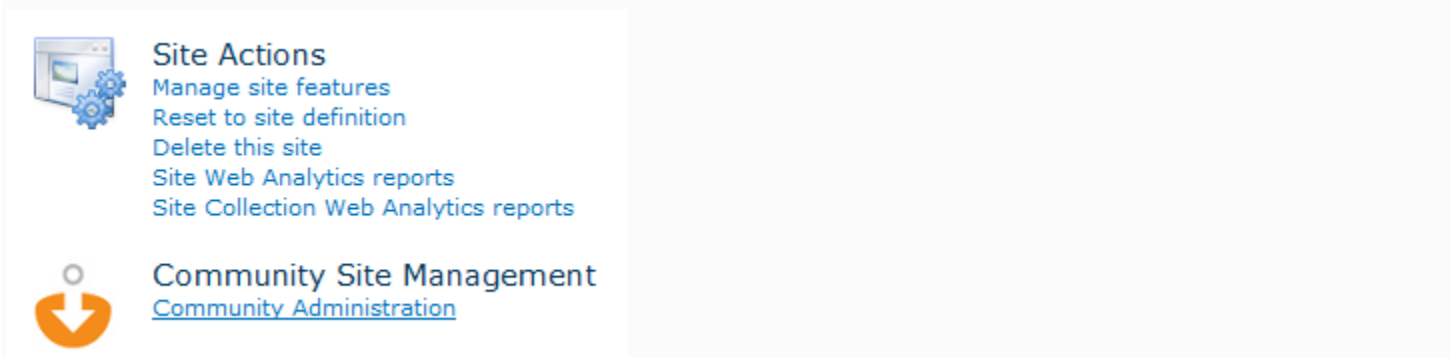
Creating and setting up a brand new public community (site-level)

> ⚠️ ***Warning***
>
> *Never create a community as a subsite of a My Site. Errors will occur when attempting to navigate to or follow such communities.*

.
Communities are created through the Community Creation Wizard or by activating the Community Web feature on an existing site.

The wizard begins via the normal SharePoint site creation choice.

Site Actions ▾

Browse | Page

Edit Page
Edit the contents of this page.

New Page
Create a page you can customize.

New Document Library
Create a place to store and share documents.

New Site
Create a site for a team or project.

More Options...
Create other types of pages, lists, libraries, and sites.

View All Site Content
View all libraries and lists in this site.

Edit in SharePoint Designer
Create or edit lists, pages, and workflows, or adjust settings.

Site Permissions
Give people access to this site.

Site Settings
Access all settings for this site.

On the following screen, the user selects the NewsGator Public Community option and enters a name and a URL.

After clicking Create, which screen appears next depends on whether templates have been defined (see **Manage Community Templates section** under **Section-by-section description of the NewsGator Social Platform Management page**, above, for instructions on defining templates). The view below shows a case where four templates have been defined, but community creators are free to create a community without a template.

Selecting a template will display community options depending on what was enabled in the template definition. Clicking "Click here to continue without a template" will display all community options. Had there been no templates defined, you would go directly to the screen displaying all community options. Filling out this community setup page is the last step of the community creation process. Due to this page have so many options, and being used in the process of creating other types of communities, it has its own section in this document, the **Community Setup Page** section below.

Creating and setting up a brand new private community (site-level)

> ⚠️ **Warning**
>
> *Never create a community as a subsite of a My Site. Errors will occur when attempting to navigate to or follow such communities.*

Communities are created through the Community Creation Wizard or by activating the Community Web feature on an existing site.

The wizard begins via the normal SharePoint site creation choice.
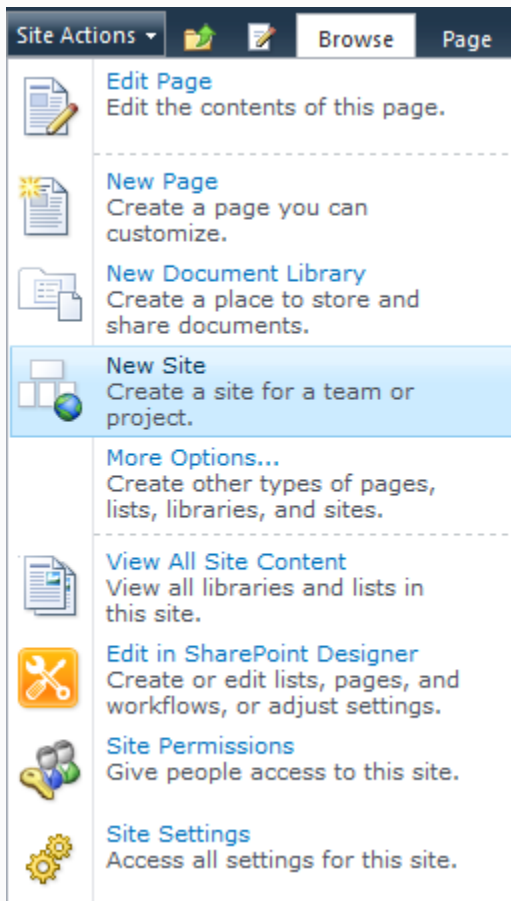
On the following screen, the user selects the NewsGator Private Community option and enters a name and a URL.
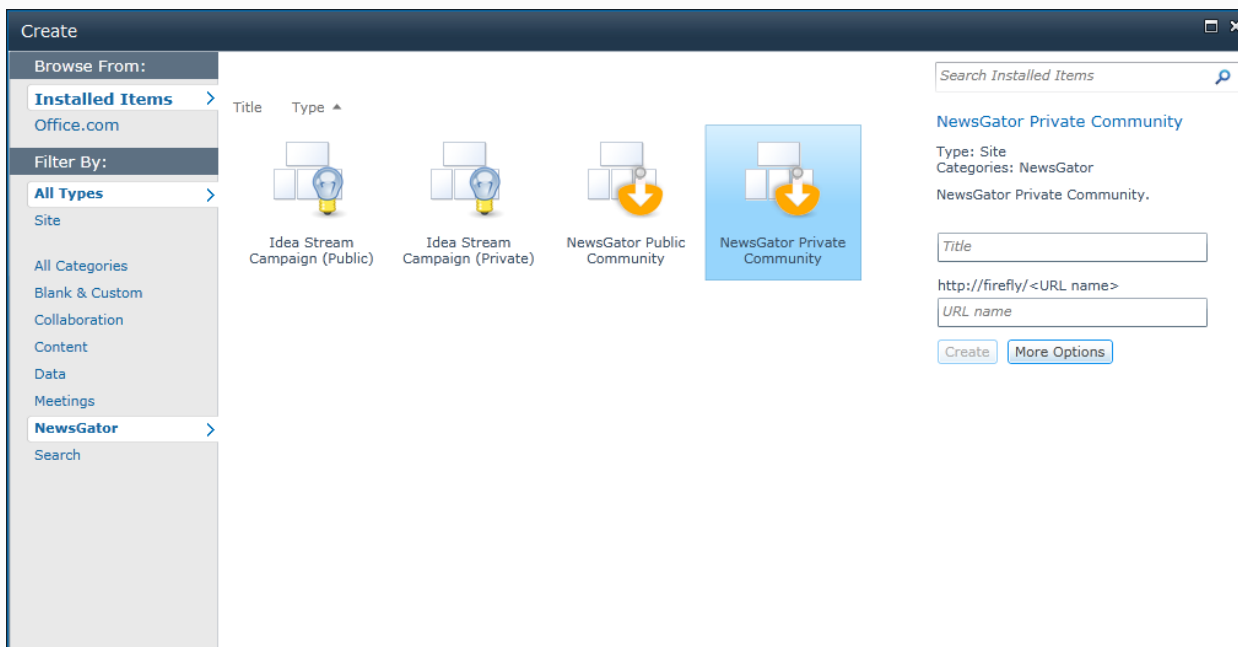
After clicking Create, a security page like the one shown below appears. This is the only step that is not included in the public community creation process. Note that if you make selections here that include the Public Community Members group, when your community is complete you will receive an admin notification that your community security settings don't match your choice of making a private community. (For more on the Public Community Members group, see **Public Community Members section** under **Section-by-section description of the NewsGator Social Platform Management page**, above.)

After clicking OK on the security settings page, which screen appears next depends on whether templates have been defined (see **Manage Community Templates section** under **Section-by-section description of the NewsGator Social**

Platform Management page, above, for instructions on defining templates). The view below shows a case where four templates have been defined, but community creators are free to create a community without a template.

Selecting a template will display community options depending on what was enabled in the template definition. Clicking "Click here to continue without a template" will display all community options. Had there been no templates defined, you would go directly to the screen displaying all community options. Filling out this community setup page is the last step of the community creation process. Due to this page have so many options, and being used in the process of creating other types of communities, it has its own section in this document, the **Community Setup Page** section below.

Creating and setting up a brand new community (site collection level)

In Sitrion Social, it is highly recommended to create all communities as sites and not as site collections. There are a few reasons for this:

- There is not a way to apply a community template to a site collection community.
- Community rollup capabilities work within a site collection but not across site collections.
- There have been some defects associated only with site collection communities, such as deleted ones still showing in web parts that list communities, and the Latest Blog Posts web part displaying bad links only when placed on a site collection community.

See the previous section for instructions on how to create a community as a site.

If you decide to create a community as a site collection, it is done by selecting a site collection template during the regular SharePoint site collection creation process. The screenshot below shows the template section for site collection creation.

Select **NewsGator Public Community** or **NewsGator Private Community**, depending on which community type you want.

Note: The Idea Stream entries are only present if the Idea Stream module is loaded.

After creating the site collection, your community will most likely look like the image below.
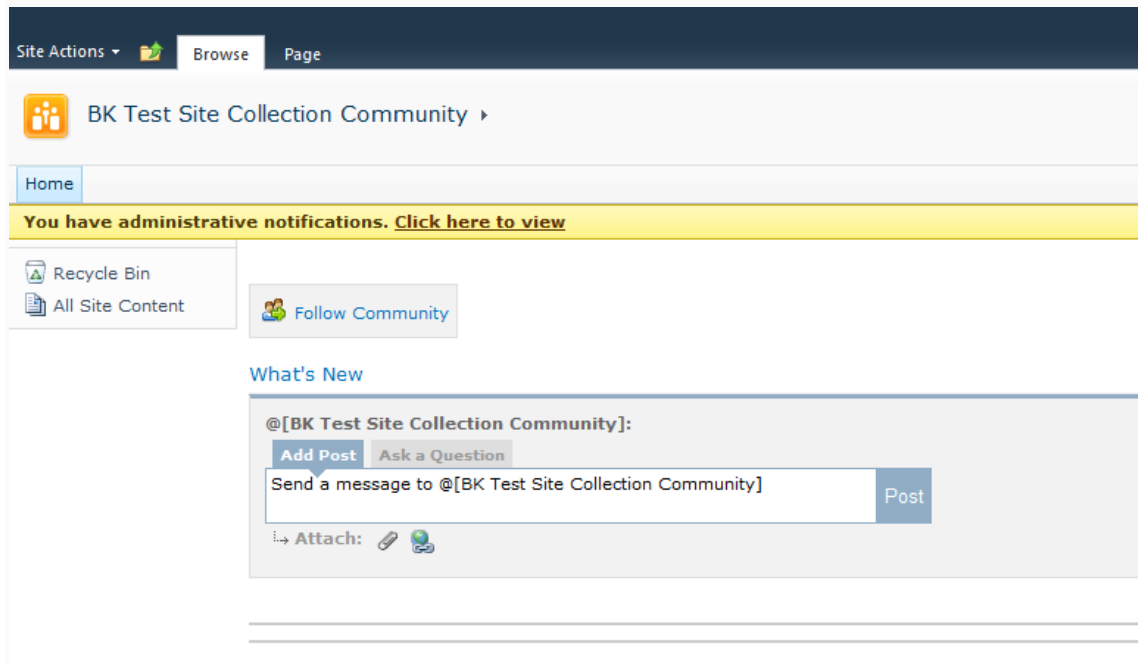
Click the link in the yellow notification bar to bring up any situations which you need to address.
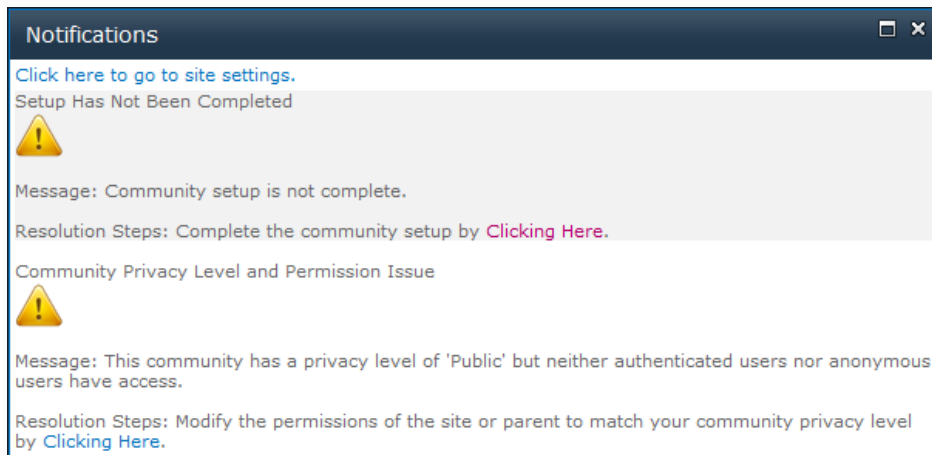
Note: You will always get the "Setup Has Not Been Completed" message when creating a community as a site collection using either community template in Central Administration. This is because, unlike when creating a community as a site, Sitrion Social does not gain control and therefore cannot automatically direct you to the community setup page. Completing this page is considered an essential part of creating a community, so you should always follow this recommendation to "Complete the community setup by Clicking Here".

This brings you to the community setup page. Filling out this community setup page is the last step of the community creation process. Due to this page have so many options, and being used in the process of creating other types of communities, it has its own section in this document, the **Community Setup Page** section below.

If on the community setup page you choose to enable the Sitrion Social default master page for communities, your site collection-level community will look just like a community created at the site level:
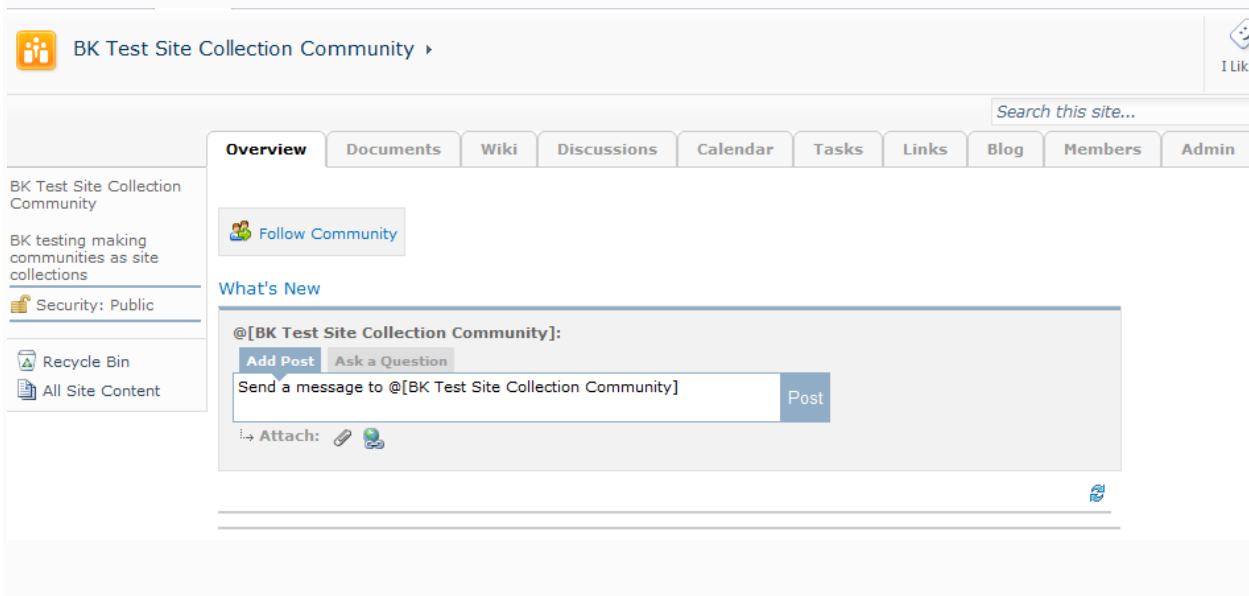
A tour through your new community

The screenshot below depicts a community created through this wizard and using the NewsGator Master Page.
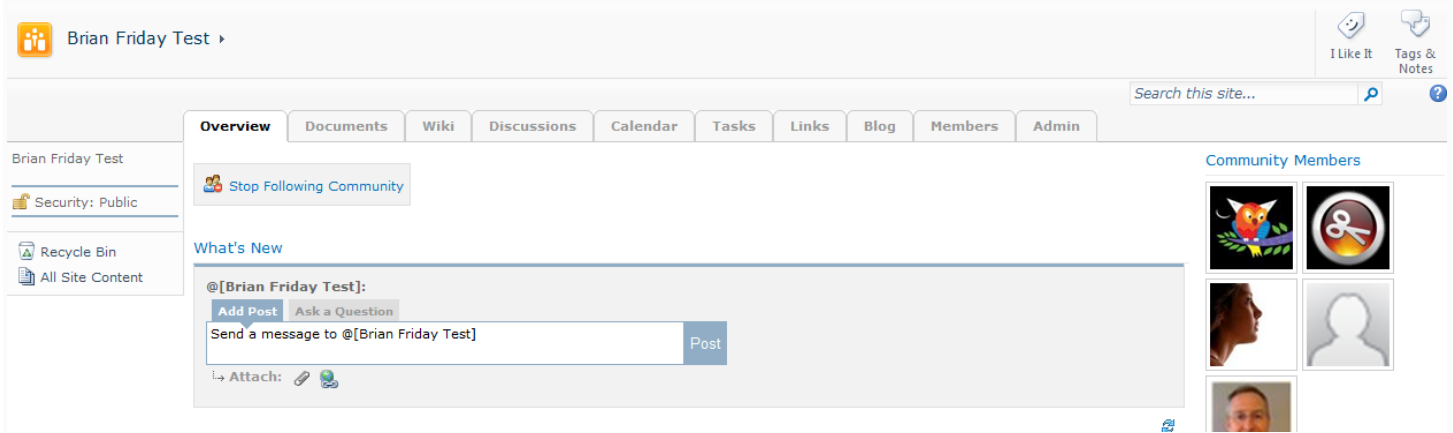
The majority of the functionality in the community is standard SharePoint capability. The **Overview tab**, **Members tab**, **Questions tab**, and **Admin tab** have additional functionality provided by Sitrion Social.

The Overview (default) tab

When you navigate to a community, the first tab you'll see is the **Overview** tab, like the one pictured above. This may go by another name if you chose to rename it during community creation, or if you later returned to the community setup page and changed it.

The **Follow / Stop Following** link above the Activity stream gives users an easy way to choose to follow this community.

The Activity Stream behaves just like the versions for My Newsfeed and My Profile. It shows actions taken in this community as well as microblog updates and questions targeted at this community with the @ control.

The community members thumbnail web part defaults to showing ten members (ordered by activity) but can be adjusted to more or fewer. It also provides a link to the members page.

The Members tab

The **Members** tab allows for searching and sorting of users. It also allows Site Owners to give individual users specific titles within the community, and to assign specific capabilities (Curator, MVP, and Moderator) as shown below.
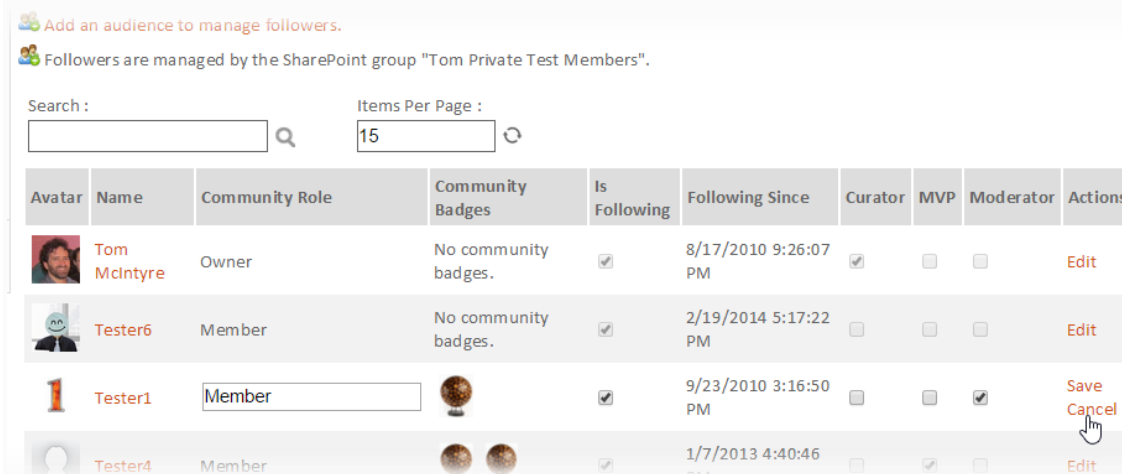
Beginning in version 3.5, site owners will see additional links atop this tab which describe the ways in which they may manage who is following the community (previously only available in the **Admin Links** section of the **Admin** tab):
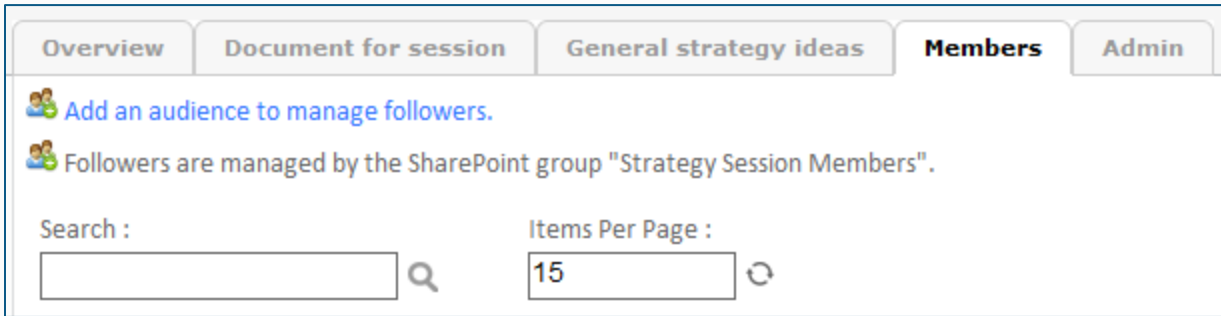
The **Add an audience to manage followers** link only displays if the owner also has the **Manage Audiences** permission on the NewsGator Social Platform Services service application. Use of this link is described in detail in the **Setting Community Followers Using SharePoint Audiences** section, below. If an audience has already been selected for managing community followers, then name of the audience will be displayed here instead, with a link to allow changing the audience selection.

Almost all communities will have a SharePoint group that is designated as the Members group. On such communities there will be a statement in the Admin Links web part giving the name of that community's Members group. Sitrion Social will cause anyone added to this group to be automatically followed to the community. Use of this group for managing followers is described in detail in the **Setting Community Followers Using the Default Members Group** section, below.

The Questions tab

The **Questions** tab in the community provides a center for discovering and managing the questions of the community. It presents a view of all questions which targeted this community, and allows users to enter questions here which are targeted to this community. It also contains a set of filters designed in part to make it easier to ensure the question and answer cycle is complete, with the filter "Unanswered" to help curators stay on top of questions that need answering, and the filter "Answered without Good Answer" to help curators and question askers give feedback to those who provided an answer..
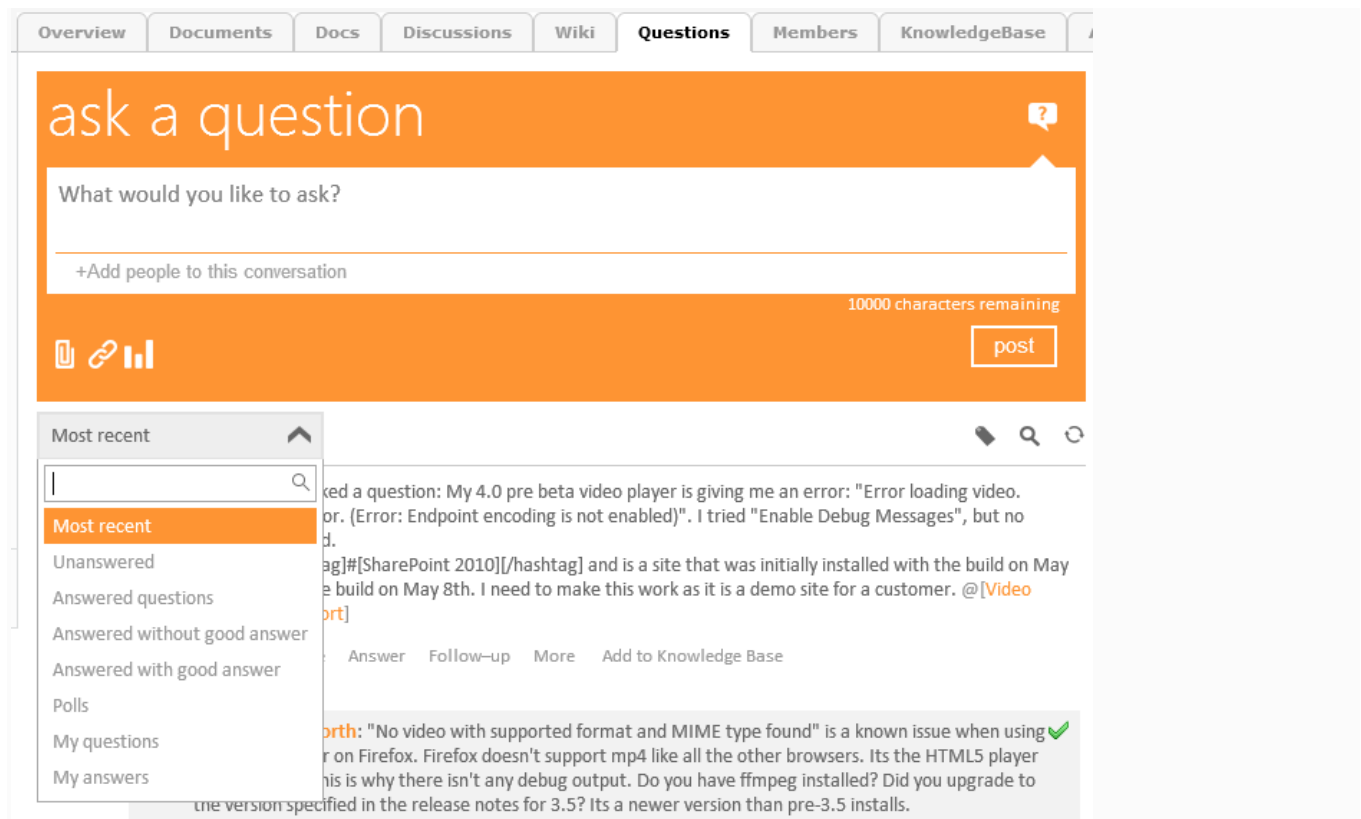
The tab simply links to the underlying Questions.aspx page, so if you are using a custom template for your communities, you may choose to link to this directly. When using the tabbed master page, you can add a new Questions tab or define one to be included in templates.
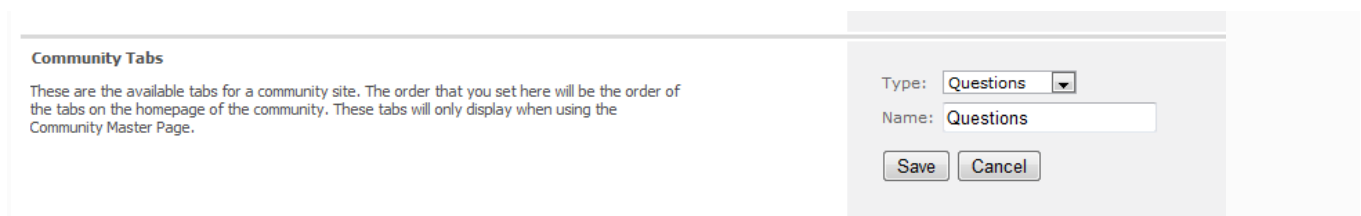
The Admin Tab

The Admin tab provides reporting and controls for community administrators.

The following chart summarizes each web part that appears on the Admin tab.

Admin-Based Web Parts	Why is it useful?	Example
Activity by Type	The Activity By Type web part helps you understand which type of activity has been most popular in the community for the last 90 days. When this web part is placed outside of a community, it shows data across the entire system.	
Activity History	Displays an historical trend line of the daily activity level in the community going back as many as 90 days. The display can be filtered by each event type, or show overall activity. When this web part is placed outside of a community, it shows data across the entire system.	
Top Users Activity Report	The Top Users Activity Report web part displays the most active people in the community based on the number of tracked actions that user has taken in the community over the last 90 days. This web part can also be useful on a community overview tab to recognize the most active contributors within the community in order to drive participation.	

Admin-Based Web Parts	Why is it useful?	Example
	When this web part is placed outside of a community, it shows data across the entire system.	
Export Report	In some cases, community owners may want to analyze the reporting data for their community in ways the other reporting web parts don't support. This web part allows exporting the data into csv format which can be readily used in Microsoft Excel for additional reporting. This web part is deployed by default on the Admin tab of communities. Clicking in the "from" or "to" boxes brings up a date selector control. After selecting the data range and clicking "export", your browser will prompt you to allow opening or saving a file. The data is provided in three main columns when viewed from a community. They show the date, user and type of action. Note: This export web part is also available on the global reporting page and there it exports data on a global scope.	
Admin Notifications	Notifies community admins of important issues that need to be resolved. When there are such issues, admins will see a yellow alert bar when arriving at the community, providing a link that pops up the same message will be found by viewing this web part on the Admin tab.	

Admin-Based Web Parts	Why is it useful?	Example
Quick Admin	This web part provides a community owner a way to administer the community's capabilities and other properties ("Go To Setup") and where community permissions can be changed ("Edit Membership").	**Admin Links** • Go To Setup • Edit Membership • Add an audience to manage followers. • Edit Classifications and Interests

The **Admin Links** web part is your launching point for community administration tasks. It may contain more links than the minimal ones shown in the above picture.

Admin Links

- Go To Setup
- Edit Membership
- Spotlight Administration
- Followers are managed by the SharePoint group "Video Stream Support Members". (Members of this group will auto-follow this community when the community processor job runs, unless they opt-out.)
- Social List Settings
- Edit Classifications and Interests
- Email Members
- Question and Answer Reports
- Community Engagement Scorecard

The **Go To Setup** link takes the admin back to the settings page that appears during the creation wizard (see **Creating and setting up a brand new public community (site-level)**, above).

Edit Membership takes the admin to the Members tab.

Spotlight Administration appears only when the Spotlight module is installed. It allows administration of community badges.

Add an audience to manage followers appears to you only if you have the Manage Audiences permission on the NewsGator Social Platform Services service application. Use of this link is described in detail in the **Setting Community Followers Using SharePoint Audiences** section, below. If an audience has already been selected for
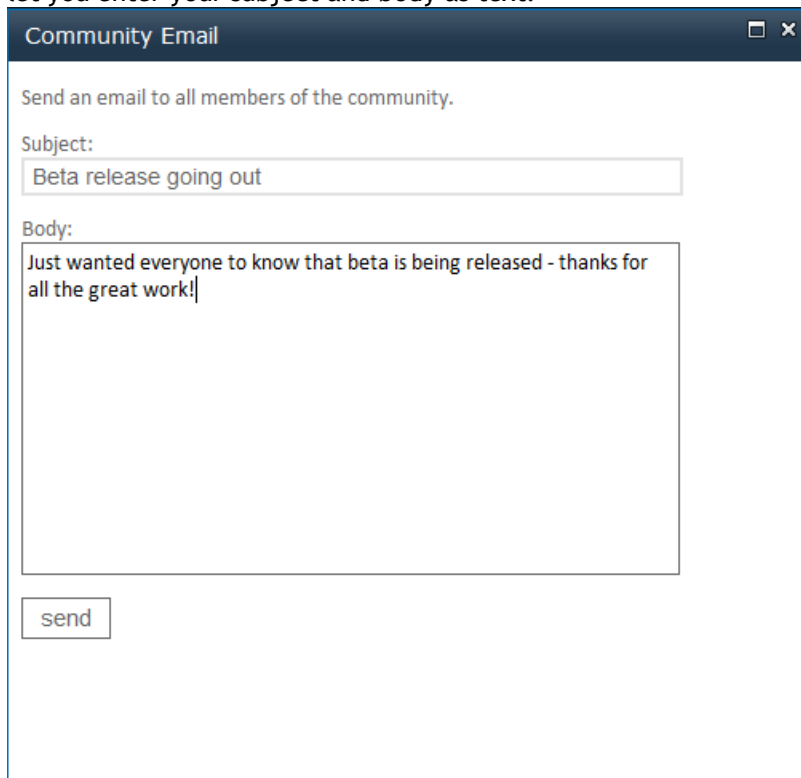
managing community followers, then name of the audience will be displayed here instead, with a link to allow changing the audience selection. As of version 3.5, this link also shows atop the **Members** tab.

Almost all communities will have a SharePoint group that is designated as the Members group. On such communities there will be a statement in the Admin Links web part giving the name of that community's Members group. Sitrion Social will cause anyone added to this group to be automatically followed to the community. Use of this group for managing followers is described in detail in the **Setting Community Followers Using the Default Members Group** section, below. As of version 3.5, this link also shows atop the **Members** tab.

Social List Settings is where you can configure what lists should create social activities in this site's newsfeed. See the "Selecting Which Lists and Libraries Create Events" section below for more details.

Edit Classifications and Interests opens a dialog that allows two types of tags to be connected with the community. These are described in detail in the **Community Interests** and **Community Classification** sections, below.

Email Members allows a community owner to call attention to something via email. Clicking this link opens a dialog to let you enter your subject and body as text.
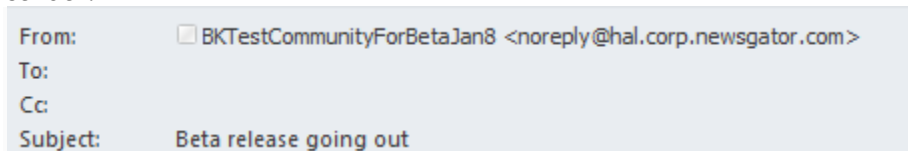
Clicking the "send" button causes an email to be sent with recipients as BCC addresses and with the community as the sender.

The **Question and Answers Report** will provide a rich set of statistics on question and answer activity in the community:

Question and Answers

Year	Month	New Questions	Average Time to First Answer (minutes) [1]	Average Time to First Good Answer (minutes) [2]	Unanswered	Answered	With a Good Answer	Answered in 24 Hours	Answered in 48 Hours	Answered in 96 Hours	Answered in 96+ Hours	Good Answer in 24 Hours	Good Answer in 48 Hours	Good Answer in 96 Hours	Good Answer in 96+ Hours
2012	June	5	5289	19	0.00 %	100.00 %	20.00 %	80.00 %	80.00 %	80.00 %	100.00 %	20.00 %	20.00 %	20.00 %	20.00 %
2012	July	26	8564	464	7.69 %	92.31 %	23.08 %	84.62 %	84.62 %	88.46 %	92.31 %	19.23 %	23.08 %	23.08 %	23.08 %
2012	August	29	549	823	13.79 %	86.21 %	34.48 %	79.31 %	79.31 %	86.21 %	86.21 %	27.59 %	31.03 %	34.48 %	34.48 %
2012	September	16	541	1642	0.00 %	100.00 %	50.00 %	93.75 %	93.75 %	93.75 %	100.00 %	37.50 %	37.50 %	37.50 %	50.00 %
2012	October	21	1342	2182	14.29 %	85.71 %	42.86 %	71.43 %	76.19 %	80.95 %	85.71 %	33.33 %	38.10 %	38.10 %	42.86 %
2012	November	18	968	1658	22.22 %	77.78 %	16.67 %	66.67 %	66.67 %	72.22 %	77.78 %	11.11 %	11.11 %	16.67 %	16.67 %
2012	December	10	103	494	30.00 %	70.00 %	30.00 %	70.00 %	70.00 %	70.00 %	70.00 %	30.00 %	30.00 %	30.00 %	30.00 %
2013	January	39	986	6095	5.13 %	94.87 %	28.21 %	84.62 %	87.18 %	92.31 %	94.87 %	15.38 %	17.95 %	17.95 %	28.21 %
2013	February	30	783	648	10.00 %	90.00 %	36.67 %	76.67 %	86.67 %	86.67 %	90.00 %	33.33 %	36.67 %	36.67 %	36.67 %
2013	March	23	210	150	13.04 %	86.96 %	43.48 %	86.96 %	86.96 %	86.96 %	86.96 %	43.48 %	43.48 %	43.48 %	43.48 %
2013	April	27	736	3923	11.11 %	88.89 %	37.04 %	77.78 %	81.48 %	85.19 %	88.89 %	18.52 %	18.52 %	33.33 %	37.04 %
2013	May	27	579	6106	7.41 %	92.59 %	22.22 %	77.78 %	85.19 %	92.59 %	92.59 %	18.52 %	18.52 %	18.52 %	22.22 %
2013	June	29	479	903	17.24 %	82.76 %	31.03 %	72.41 %	79.31 %	82.76 %	82.76 %	24.14 %	27.59 %	31.03 %	31.03 %
2013	July	30	979	1863	10.00 %	90.00 %	50.00 %	80.00 %	83.33 %	83.33 %	90.00 %	36.67 %	36.67 %	40.00 %	50.00 %
2013	August	28	365	1427	7.14 %	92.86 %	28.57 %	85.71 %	89.29 %	92.86 %	92.86 %	21.43 %	21.43 %	25.00 %	28.57 %
2013	September	43	483	442	11.63 %	88.37 %	25.58 %	76.74 %	86.05 %	88.37 %	88.37 %	20.93 %	25.58 %	25.58 %	25.58 %
2013	October	32	357	3746	15.63 %	84.38 %	21.88 %	81.25 %	81.25 %	81.25 %	84.38 %	12.50 %	12.50 %	15.63 %	21.88 %
2013	November	32	501	3718	9.38 %	90.63 %	28.13 %	87.50 %	87.50 %	87.50 %	90.63 %	18.75 %	21.88 %	21.88 %	28.13 %
2013	December	25	372	776	16.00 %	84.00 %	28.00 %	76.00 %	80.00 %	84.00 %	84.00 %	24.00 %	24.00 %	28.00 %	28.00 %
2014	January	3	2	0	33.33 %	66.67 %	0.00 %	66.67 %	66.67 %	66.67 %	66.67 %	0.00 %	0.00 %	0.00 %	0.00 %

Notes:
[1] Average only includes questions that have been answered. Since questions may get answered after the current month, answer time may span months.
[2] Average only includes questions that have good answers. Since questions may get marked as good answers after the current month, time may span months.

The **Community Engagement Scorecard** link will appear if the Engagement Scorecard solution has been installed. Please the Engagement Scorecord documentation for more details.

The **Admin Notifications** web part will display messages if Sitrion Social detects something amiss with the community. For example, you'll see a warning here when the SharePoint security of the site does not match the privacy type of the community. It might also inform you that setup of your community is not complete.

The **Activity By Type** web part shows the overall activity for the last 90 days by percentage in a pie chart view.

The **Activity History** and **Top Users Activity Report** web parts are linked. By default they show the trend line for all event types in the community and the top users by total events for the last 90 days. Changing the filter on the Event Statistics part to a specific event type will show the trend line for only that kind of activity as well as the top users for that activity.

Communities automatically capture events for the following types of lists and libraries. If one of these lists/libraries is added after the community is created, changes in it will still cause events in the activity stream.

- Documents
- Pictures
- Links
- Tasks
- Contacts
- Calendar
- Wiki
- Announcements
- Discussion
- Blog (Note: If a blog post requires approval, it will never generate an event. Blog posts which are directly published after writing do create events.)

The Community Moderator Role

In many cases, companies want to have people who manage the social settings for a community but who do not have the ability to change SharePoint settings (things like editing pages or changing permissions). Historically, this was not possible as these capabilities were granted by giving SharePoint site owner permissions, which permits both. By granting some community members the moderator role it is possible to only give specific rights for managing the social settings, without granting site admin capabilities.

Moderators are specified by having an existing a community owner or a moderator edit a user row on the Members tab.

Avatar	Name	Community Role	Community Badges	Is Following	Following Since	Curator	MVP	Moderator	Actions
	Tester2	Member	No community badges.	☑	Monday, January 07, 2013 4:39:07 PM	☐	☐	☐	Edit
	Tester1	Member	No community badges.	☑	Tuesday, August 17, 2010 9:27:39 PM	☐	☐	☑	Save Cancel

Moderators can also give people the "curator" and "mvp" designations on this page.

Moderators can remove posts from displaying in the community stream.

Brian Kellner: @[Product Management]: just an example post

more example testing

and more

less than a minute ago   Like   Comment   Follow-up   Translate   More   Add to Knowledge Base

Report

Remove from community

Remove Product Management from my digest emails

Moderators have access to the Admin tab in a community and access the following links as well as viewing the reporting web parts.

Admin Links

- Edit Membership
- Spotlight Administration
- Edit Classifications and Interests
- Email Members
- Question and Answer Reports
- Community Engagement Scorecard
- Configure Audience Targeting for Tabs
- Social Email Microblogs
- Social Email Questions

NOTE: As of the 5.3 release, moderators can also pin posts in the community activity stream.

Configuring a community

Nearly all configuration options for a community are available from one of the following four pages:

- The **Site Features page** for the community site (accessible via Site Actions > Site Settings > Manage site features)

- The **Members tab** of the community (in untabbed communities this can be accessed via the **See All Members** link in the **Community Members** web part)

- The **Admin tab** of the community (in untabbed communities this can be accessed via Site Actions > Site Settings > Community Administration)

- The **Setup page** for the community (accessible via the top link in the Admin tab)

We'll begin with the Setup page, as it is part of the community creation process, and it holds the most settings.

Community Setup Page

The community setup page is accessible by going to the Admin tab of a community and clicking the Go To Setup link at the top of the Admin Links section:
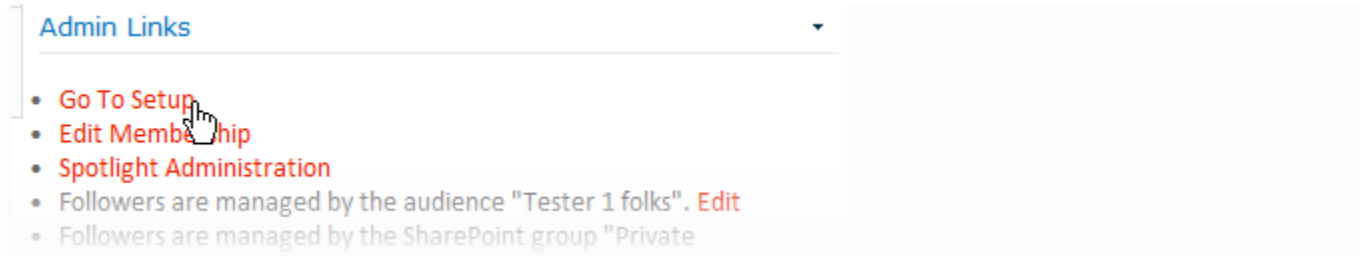
(If there are no tabs in your community, you can access the Admin tab by opening the Site Actions menu, choosing Site Settings, and clicking the **Community Administration** link.)

This displays the following page:

Community Name	Public And Discoverable
This is the name of the community. This name must be be unique.	

Privacy Level	Public ▾
This is the recommended privacy level for this community.	☑ Enable public contribute rights
NOTE FOR PRIVACY LEVELS:	
Private: Only Followers will see activities in their activity stream, and users will only be able to Follow from this site.	
Public: Users will be able to follow this site regardless of their SharePoint permissions, and activity events will be public within the activity stream, through search and colleague newsfeed relationships.	

Read Only	☐ Allow only administrators to post to this Community
Activate this setting to prevent anyone that is not a community administrator from creating microblog posts in this community. With this mode enabled, site administrators may not be able to target this community in microblogs created outside of the current site.	

Disable Follower Controls	☐ Disable Follow and Unfollow Controls
When this is selected, user actions to follow or unfollow the community are hidden and disabled, and the followers will be managed by the default members group and optionally an associated audience.	

Discovery	☑ Discoverable
Let users find this community in community recommendations and community search results, regardless of privacy settings.	

Incoming Email	☐ Enable publishing incoming email to the activity stream.
Activating this setting will create mailboxes for incoming email to be published to the activity feed for the community.	

Master Page Selection	⦿ SharePoint Default
This allows you to select which master page to use for the site. It will also allow you to upload your own custom one.	◯ Community Master Page (with tabs)
	◯ Custom Master Page
	[ ] Browse...

Overview Tab	Overview
This will allow you to rename the Overview tab.	

Community Tabs and Navigation

These are the available tabs for a community site. The order that you set here will be the order of the tabs on the homepage of the community. These tabs will only display when Replace SharePoint Top Links With Community Tabs is enabled.

☑ Disable SharePoint Quick Launch
☑ Replace SharePoint Top Links With Community Tabs

	Enabled	Name	Type
Edit ✖ ▲ ∨	☑	Shared Documents	Document Library
Edit ✖ ^ ∨	☑	Wiki	Wiki Page Library
Edit ✖ ^ ∨	☐	Discussions	Discussion Board
Edit ✖ ^ ∨	☐	Calendar	Calendar
Edit ✖ ^ ∨	☐	Tasks	Tasks
Edit ✖ ^ ∨	☐	Links	Links
Edit ✖ ^ ∨	☑	Blog	Blog
Edit ✖ ^ ∨	☑	Members	Members Tab
Edit ✖ ^ ▼	☑	Questions	Questions

New

Event Receivers

This allows you to choose which lists have our news feed integration event receivers enabled.

Enabled	Name	Type
☑	Documents	Document Library
☑	Shared Documents	Document Library
☑	Shared Pictures	Picture Library
☑	Wiki	Wiki Page Library
☑	Workflow Tasks	Tasks

[OK]   [Cancel]

After completing all options on this page according to the instructions below, click **OK** at the bottom of the page to commit all your selections, and to create any tabs/lists you added in the **Community Tabs and**

Navigation section. You can return to this page later to reconfigure any choices you made. The following sections explain each setting on this page in the order in which they appear, top to bottom.

Privacy Level setting

When creating a public community the privacy level is pre-set to Public, and this will result in the Public Community Members group being automatically added to the community, if it would not have otherwise inherited this group from a parent site with at least read privileges. (See **Public Community Members section** under **Section-by-section description of the NewsGator Social Platform Management page**, above, for more on this group and how to configure it.) The Public Community Members group is not added to private communities. Checking the **Add public contribute rights** box ensures Public Community Members gets contribute permissions instead of just read permissions.

If you change the privacy level from Public to Private, upon completion of this page you'll be redirected to a security page on which you can define which users will have Visitor, Member, or Owner permissions in the community.

An action that a user takes in a Public community will show to all members of that community AND all people who are following that user as a colleague. An action taken in a Private community will ONLY show to followers of that community (People who have access to that Private community's site can view the events for that community on the community activity stream without following).

Limiting Microblog and Question Posting to Admins

Some communities are established primarily to get a message out. When communities have very broad lists of followers (for example communities which have everyone in the "all company" distribution list), companies may choose to prevent end users from sending microblogs or questions to everyone in the community. Communities have a setting to only allow community admins to post messages. This setting (Read Only) is on the community's Setup page (accessible via the "Go To Setup" link on the Admin tab).

When this setting is enabled, community administrators can still post to the community.

However, non-admins will see no input box on the community overview page.

Also, users who are not administrators cannot send messages to the community by using the @ from the activity feed. If a non-admin types in "@[DemoForDocsJan29]", that will simply be treated as text, not sent to the community, and not linked in the activity stream.

Note: This setting does not affect SharePoint permissions on the lists and libraries in a community. If users are still able to contribute to them, activity stream events will be created when new documents, wikis, blogs, etc. are created. Similarly, enabling features such as inbound email or ideas will created means for users to add events to the stream.

Removing Follow / Unfollow Options

In some cases, a company may need users to follow a particular community and not have the option to unfollow. Also, in some cases, the followership of a particular community is exactly defined by something like a distribution list. In this case, it doesn't make sense for other users to follow even if the community is public. A setting on the Setup page for a community (accessible via the "Go To Setup" link on the Admin tab) allows a community administrator to implement this choice.

Enabling this setting removes the Follow Community control. Here is the community with the control visible.
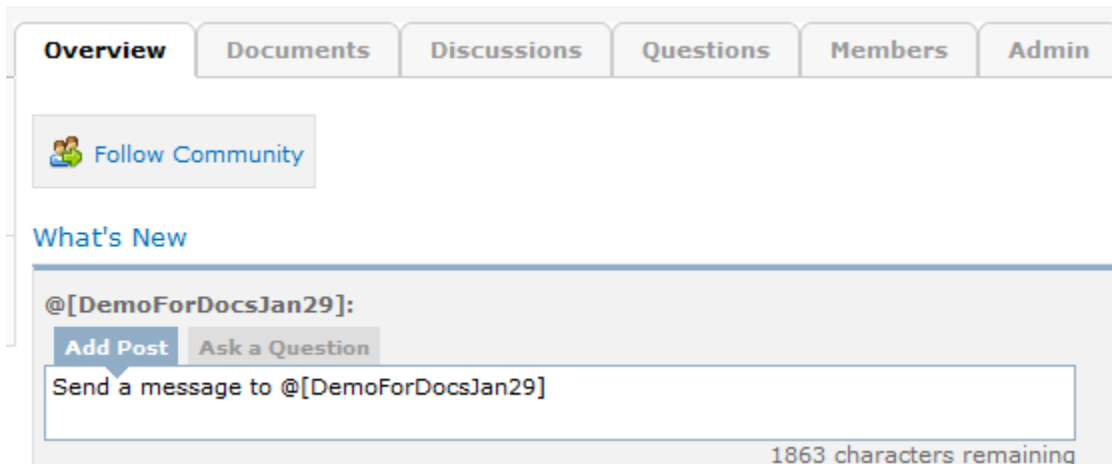
This screenshot shows what the community looks like with the control disabled.
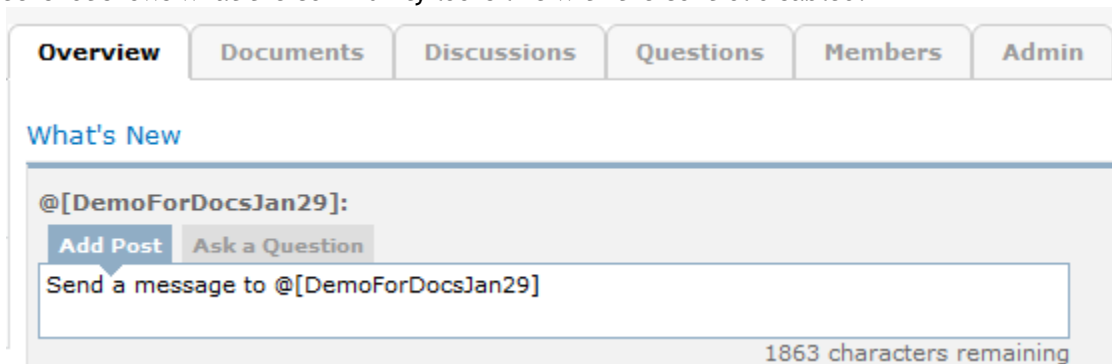
Turning this setting on also removes follow and unfollow options from other displays. For example, here is the view in the Recently Created Communities web part when follow/unfollow is disabled for the demo community.

Discoverability setting

The Discoverable setting lets you control whether this community will be displayed in recommendations, search results and on the My Profile page if the My Discoverable Communities page is deployed. This setting does not affect SharePoint search indexing the site nor does it affect which users will see actions performed within the community.

Inbound Emails for Communities

In addition to global emails (see **Global Email Addresses for microblogging and asking questions**, below), individual community owners can enable inbound microblog and question addresses for their specific community. The setting for this is in the Incoming Email section of the community's Setup page:
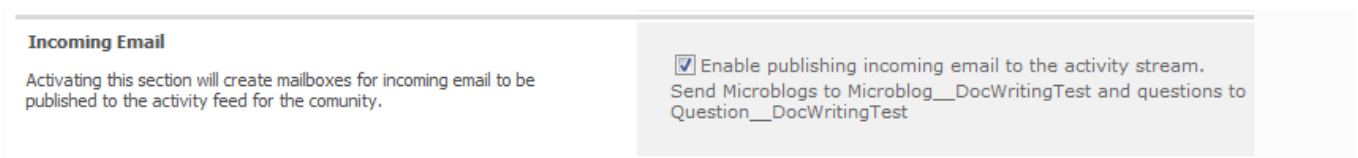
When this is enabled by checking the **Enable publishing incoming email to the activity stream** checkbox, announcement lists are created within the community and given specific email addresses. The community admin can make these addresses easily available to users by adding the Vcard web part to the community site. This part presents the addresses for the community.

VCard

Download Question VCard

Download Microblog VCard

Users click the links to add the addresses to their contact lists like any other Vcard.
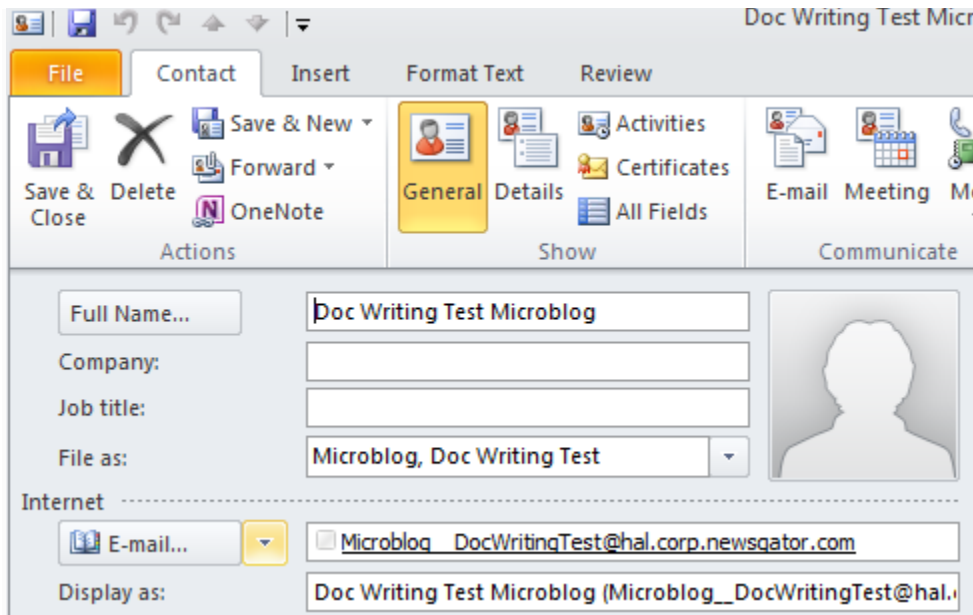
To email the community, the user simply selects the address and sends the email.

The result is just like sending to the global address, but the message will target this specific community.

Master Page Selection

In the Master Page Selection section, you can choose a default SharePoint master page, the tabbed master page provided with Sitrion Social (**Community Master Page**) or your own master page.

Overview Tab name setting

In the Overview Tab section, you can rename the landing tab for the community (the default tab displayed when navigating to the community site).

Setting to default posts to questions instead of microblogs

You can change the post control in any community so that when a user first arrives at the community site, it shows them the option for posting a question instead of defaulting to the option for making a microblog post. This is a potential benefit to users who do not understand that Sitrion Social has special support for getting their questions answered, and that they're more likely to get a high quality timely answer when creating a question post than when creating a regular micro-blog post.

To change to post control to default to question posts, go to the Admin tab of the community and click the "Go to Setup" link to get to the community Setup page. Find the **Default Post Control Action** section (pictured here) and select "Ask a Question". Be sure to click **Save** at the bottom of the Setup page to commit your change.
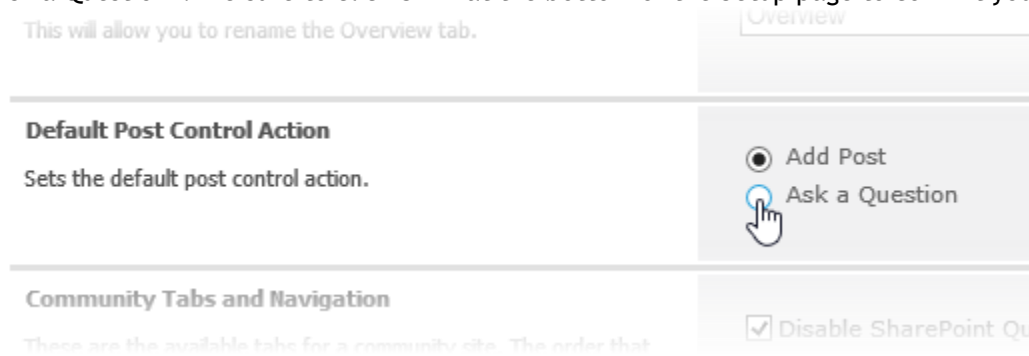
Having done this, the community's post control should now look like this, with the question option on the left:

Users can still post a regular microblog post by first clicking the speech balloon icon to the right of the question balloon icon.

Disable SharePoint Quick Launch

The top option in the Community Tabs and Navigation section allows you to disable the quick launch links that appear on the leftmost side of the community page.

On the left below is what the community looks like when these are not suppressed; on the right below, what you see when **Disable SharePoint Quick Launch** is checked.

"Tab" Navigation Using SharePoint Master Page

As part of the work to make Sitrion Social work well for both SharePoint 2010 and SharePoint 2013, Sitrion Social version 3.5 introduced a navigation option for communities that puts the links to the site contents horizontally across the top of the community site without requiring the use of the Sitrion Social master page.

With **Replace SharePoint Top Links With Community Tabs** checked and the SharePoint master page in use, you'll see links to the different pages in the community site in the upper SharePoint navigation:

With **Replace SharePoint Top Links With Community Tabs** unchecked and the SharePoint master page in use, you'll see the normal SharePoint navigation links:

To see the regular Sitrion Social community tabs, you must have the master page set to **Community Master Page** and also **Replace SharePoint Top Links With Community Tabs** must be checked.

Community Tabs enablement and positioning

Checking an **Enabled** box next to any tab in the Community Tabs and Navigation section means that tab will be included in your community. The typical tab corresponds to a single list or library in the community. The up and down arrow controls only apply if the Community Master Page has been selected. Tabs will appear in the order chosen here. If something other than the Community Master Page has been selected, checking the **Enabled** box next to a tab will result only in the corresponding list or library being created (no tab results). The exceptions are the Members and Questions tabs, which are custom Sitrion Social tab types that don't result in any list being created.

Additional tabs can be added during creation (or after the community has been established) by clicking the **New** link at the bottom of this section. Alternatively you can just modify one of the existing tab options by clicking the **Edit** link next to it. Either one of these actions changes the view to appear as follows:

There are four tab type options: **List**, **Link**, **Member**, and **Questions**.

With **List** selected, you'll see the **Available List Types** dropdown, pictured here. If you choose any of the specific list or library types shown here, that list will be created upon completion of this page (when you click **OK** at the bottom of the entire page; *not* when you click Save here, which just saves your configuration choices). The tab will display the new list. If you choose Select Existing List, another dropdown appears, displaying only those lists that already exist in the community:
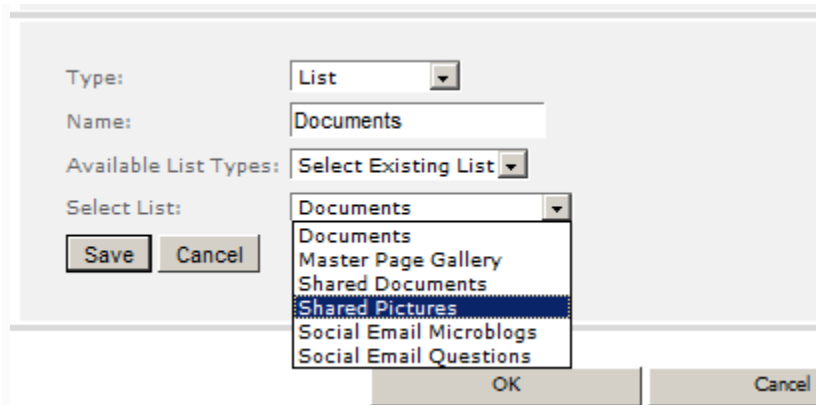
The tab will display the list you select here.

With **Link** selected, you'll be prompted for an URL. Clicking the resulting tab will redirect your browser to whichever URL you provide here.

With **Member** selected, the resulting tab will be a community members tab (see **Using and administering your new community**, below, for more on this tab type).

With **Questions** selected, the resulting tab will have an input for questions and present a compact display of all the questions (and only the questions) asked in the community.

When your selections are done, click **Save**. This does *not* create the tab; it does return you the view that lists all the tabs you've configured.

Selecting Which Lists and Libraries Create Events

In the Event Receivers section of the community's Setup page, a community owner can choose whether each list or library in her community creates events when users add new items:

What lists should create social activities in this site's newsfeed?

Publish Social Activities	List Name	Allow upload from activity stream	Default document library for uploads	Default picture library for uploads
☐	Content and Structure Reports			
☑	Form Templates	☑	☐	☐
☐	NewsGator Knowledge Base			
☐	Reusable Content			
☐	Site Assets	☑	☐	☐
☑	Site Collection Documents	☑	☐	☐
☐	Site Collection Images			
☐	Site Pages			
☑	Style Library	☑	☐	☐
☑	Workflow Tasks			

☑ Enable social activities for new lists of basic types.

[OK] [Cancel]

The lists and libraries in that community are shown, and the community owner can choose to enable or disable event creation for each of them. This is helpful if a particular library has tons of activity that is overwhelming the stream. NOTE: This page is now called Social List Settings (see section below on file upload control).

This page will also check for lists that have more restricted access. The intent is to provide community administrators with a warning so that they do not inadvertently select a list for social activities to which not all members can access resulting in confusion among the community members.

 Warning: All users in this site will see messages for new items created in Content and Structure Reports, but not everyone in this site can view this list.

 Warning: All users in this site will see messages for new items created in Form Templates, but not everyone in this site can view this list.

However, in some very large communities with complex list permission configurations, this permission check can cause the page request to timeout. As a workaround for these special situations, the community administrator can append the query string parameter ?unsafe=true to the end of the request (eg: /_layouts/15/ng/listsettings.aspx?unsafe=true). This will bypass this security check.

A status message on the list itself lets site owners know that events will not be created from the list:
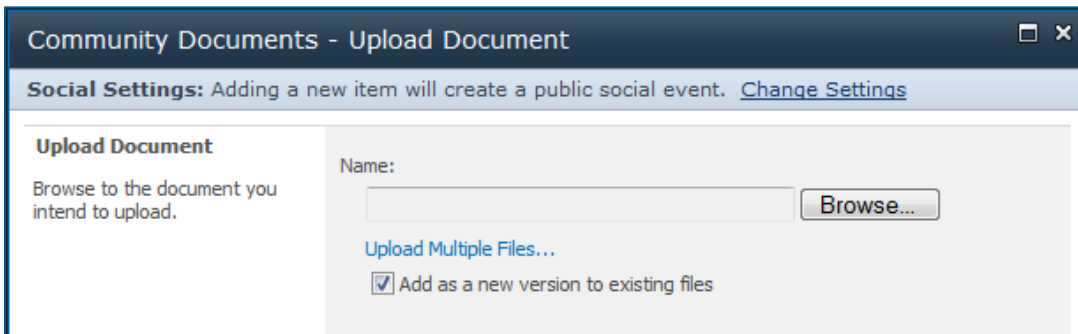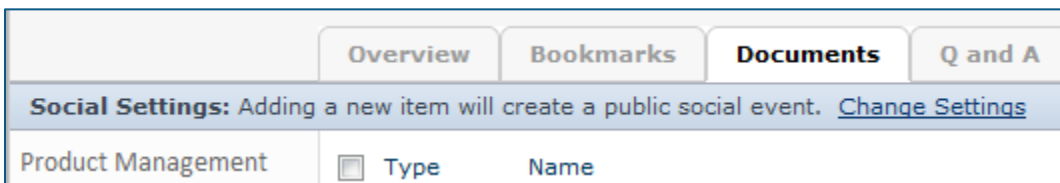
This message is useful if a list has different security than the rest of the community or if the event receivers have been unexpectedly deactivated for some reason. It also gives easy access to turn on or off event creation on the list via a **Change Settings** link.

Events from custom lists and other standard list types can also be enabled. Below is an example of a custom list in the Social List Settings:
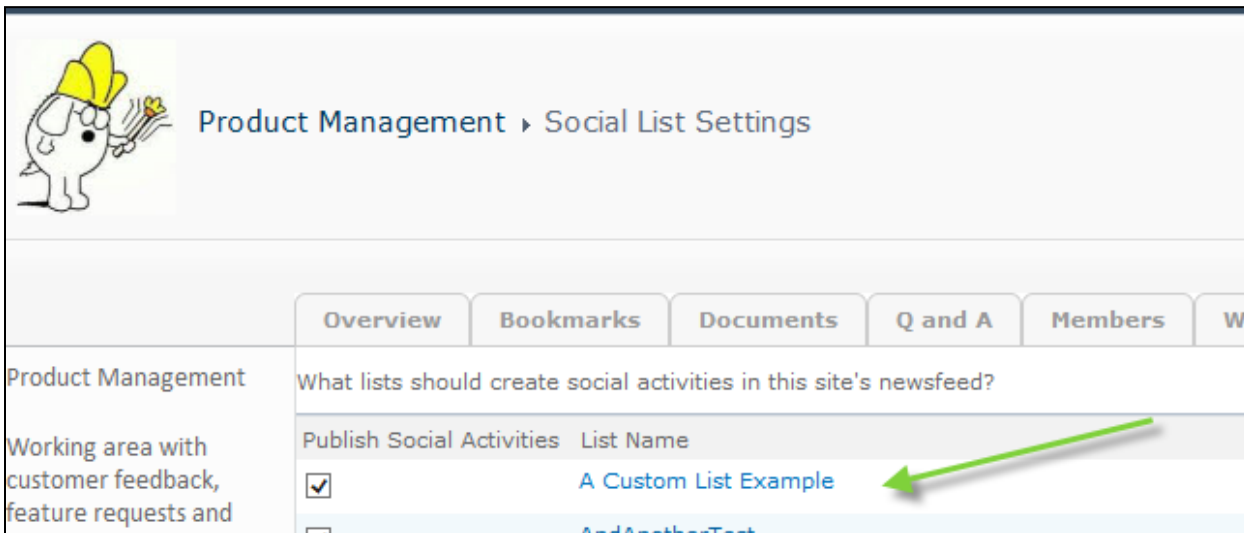
Once the "publish social activities" setting is on, activity stream items are created for new entries in the list. These events have the normal consolidation behavior for new list events in a community, so they may not appear in the stream for 30 seconds. This also means that if multiple list items are created in a short period, they are consolidated into a single event. Here is an example of an event from a custom list:
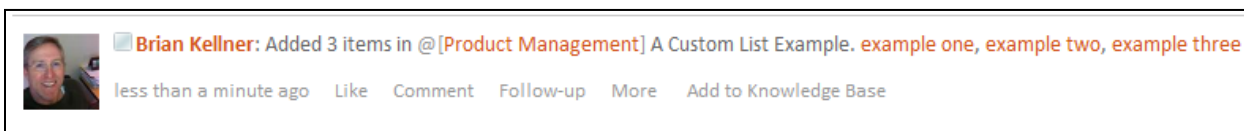
Setting Community Followers Using the Default Members Group

Community owners can determine if the community has a default members group from the Admin tab or from the Members tab of the community. This group can be used to manage who follows the community.

Users added to the default members group will be automatically made to follow to the community. Users may subsequently choose to unfollow the community, and that decision will be respected even though the user remains in the default members group.

Users removed from the default members group will be automatically unfollowed from the community, unless that user chose on their own to follow the community at any prior point in time.

If an audience is also being used to manage followers (see the **Setting Community Followers Using SharePoint Audiences** section below), the user who has not chosen on their own whether to follow or unfollow will remain a follower so long as they are in either one of the default members group or the audience. They must be removed from both to be unfollowed.

Note that regardless of any of the above, a user is always unfollowed from the community if it is found that they no longer have any site permissions to access it.

Automatically Subscribing Members to Notifications

Notifications for communities can make them extremely powerful for things running projects. Community administrators can opt-in users to these notifications. Once a user chooses to disable one of these notification types, they will no longer receive the notifications.

The control for this is on the Setup option on the Admin tab for a community.

Each type of notification can be enabled individually. If you have an existing community, it's a good idea to let users know that you're turning this on and direct them to either the community page or their notifications settings page if they want to disable the notification.

When this functionality is turned on, existing users will have the setting updated when the community processor job runs (typically hourly). New users will have the notification setting applied immediately.

NOTE: In recent releases, additional settings have been added to default more notifications on for all users as well as showing users the notifications settings upon following a community.

The top four checkboxes each turn on a different kind of notification email for each user who follows this community. The bottom checkbox causes the notifications options to display below the post box when a user follows the community.

Setting Community Followers Using SharePoint Audiences

Frequently, companies will want to set the followers of a community based on some other group defined in the company. Often this will be a distribution list or an Active Directory security group, but it could also be based on particular profile properties. SharePoint has a structure called an Audience that can be defined using any of these three criteria, and Sitrion Social can use audiences to set and maintain the followers of a community. Some common uses for this feature are making communities that map to departments or adding all company members to a community.

The ability to use this feature is tied to Manage Audiences permission on the NewsGator Social Platform Service in Central Admin (see screenshot below).
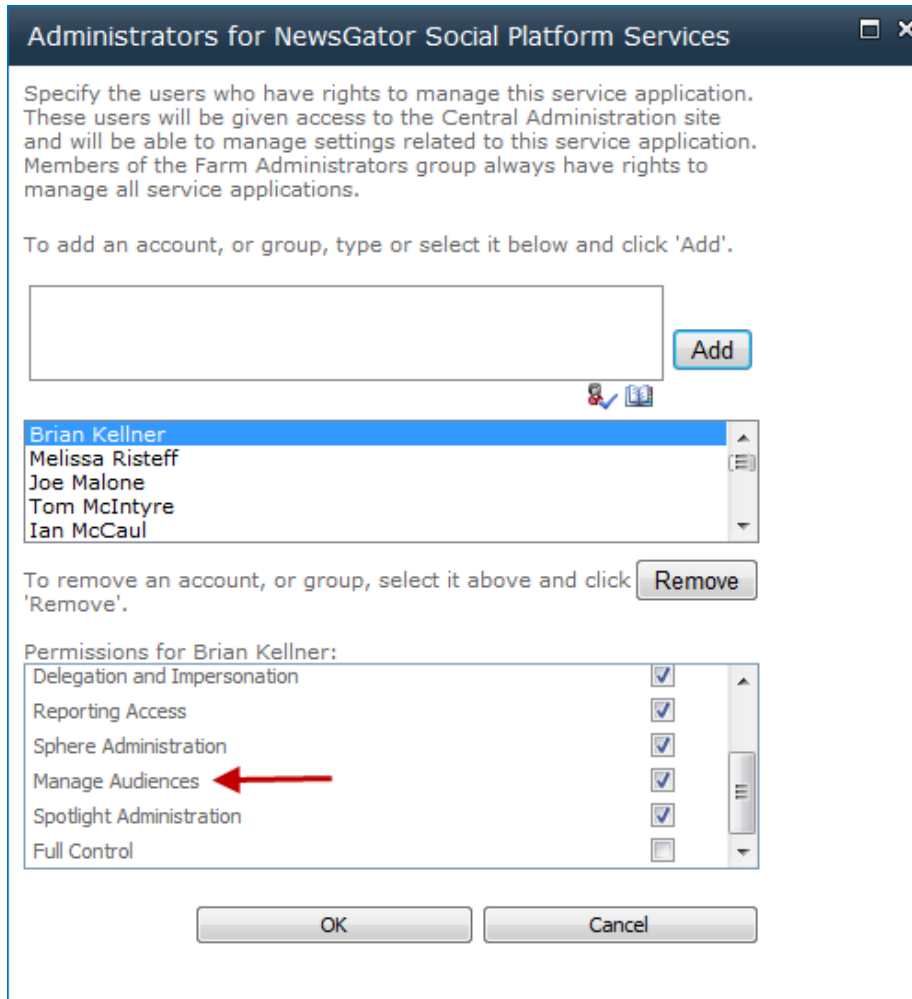
Community owners with this permission will see the link to enable this capability is located on the Admin tab.

Clicking "Add an audience to manage followers" brings up these choices:

The top drop-down control will let you choose an existing audience if one has already been defined that meets your needs. If you leave this set at "Create new", you can define the intended audience below by giving it a name, a description, and then selecting a security group or distribution list.

Clicking "Save" creates the audience and applies it to the community.

Members of the audience will be set as followers of the community at this point. If the community is a private community, you'll also see an announcement that a SharePoint security group based on the audience has been created and has been granted rights to the community (contribute and read rights). On an ongoing basis, SharePoint will re-compile the audience to reflect changes in the distribution list (or AD group or profile properties). The NewsGator Audience Processor job will check for updates in the audience and make the same changes (add or remove followers) to the community, and in the case of a private community, add and remove users to the security group that is based on the audience (this also requires the Community Processor Job to run subsequently).

Setting Which Libraries May be Used to Store Stream Attachments

In communities that have multiple document and/or picture libraries, members who post with attachments are able to select which of the community libraries will hold the attachment. They make this selection from a dropdown box that appears just below where they specify the file to attach, and that lists available libraries.
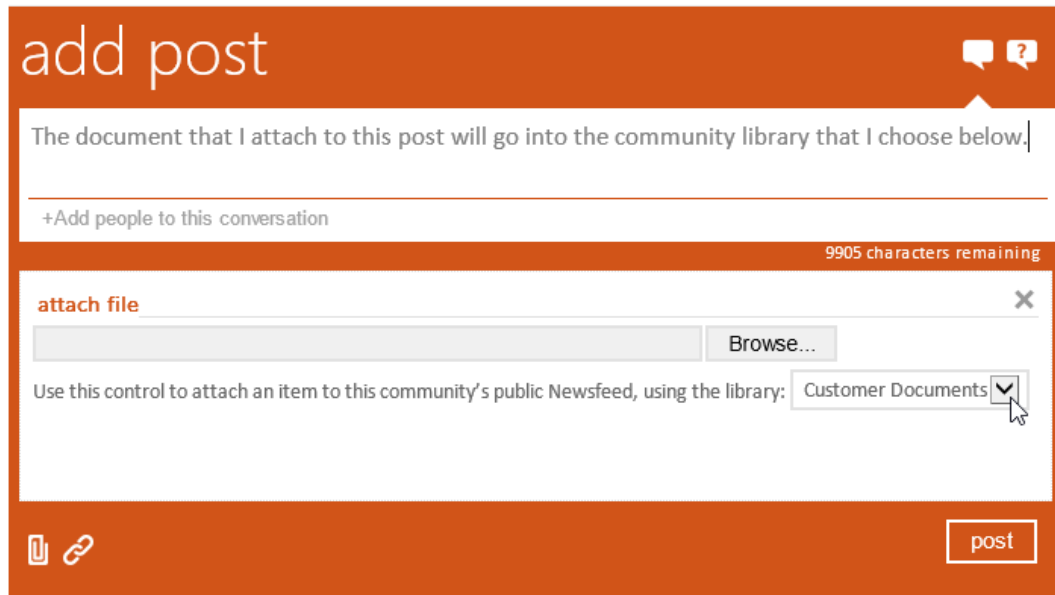
Not all users will see all the community's libraries listed in this dropdown. For one, a library won't show in this list to any user that doesn't have permission to save to it. Additionally, community admins may choose to prevent some libraries from appearing in this list to anyone at all. They do this by clicking the "Social List Settings" link on the Admin tab of their community (the Admin tab can always be reached by clicking the "Community Administration" link on the community's site settings page):
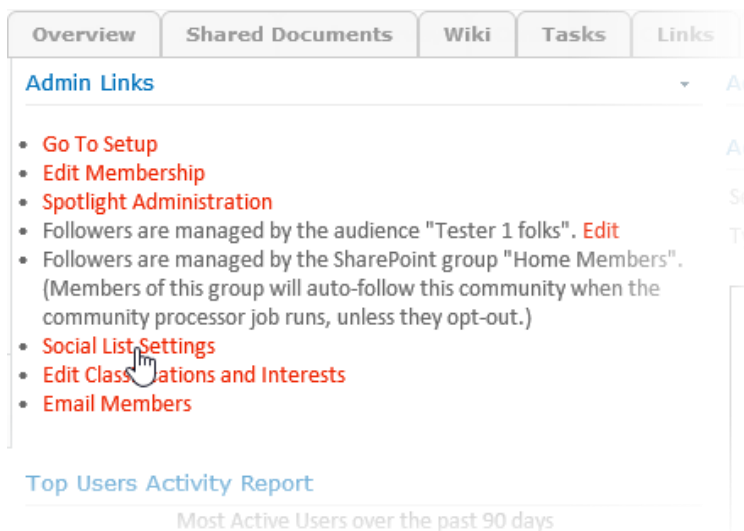
The page that appears shows all the lists in the community, libraries and non-libraries alike. Only libraries, however, will have checkboxes providing the option to "Allow upload from activity stream". These are all checked by default. Unchecking this box for any library will cause that library to no longer appear as an option in the dropdown for selecting where an attachment will be stored.

It is recommended to keep at least one document library checked, and at least one picture library checked. This way, a library of the appropriate type can always be selected, for both picture and non-picture files. (To assist the user with selecting an appropriate type of library, the library that the dropdown is set to will change from a document library to a picture library automatically when the user specifies a picture file for attachment.)

NOTE: No extra configuration is required to ensure users are prompted for any metadata required by the library they selected. If there is a form prompting for metadata when users upload items directly to the library (which occurs whenever there are required data fields to be filled out), then that same form is automatically displayed after the user posts a message with an attachment destined for that library.

NOTE: In later releases, this page now includes options to specify which library should be the default choice in the dropdown for the post dialog for document and for picture uploads. In the release notes, it originally specified that "publish social activities" must be enabled for a library to be visible in the drop-down list of choices. That is no longer true – any library selected in the "allow upload" column will show in the drop down.

Community Interests

Communities can be given **Interests**, a list of terms which functions for a community very much like the Interests profile property functions for users. Public items in the activity stream that have these terms as hashtags will automatically show up in the community activity stream view (even if they weren't targeted at this community).

The following example shows how to set up a community with "Documentation" as an interest, and the resulting effect this will have on the activity stream view in the community. Within the community Admin tab, click the **Edit Classifications and Interests** link:

This opens a simple dialog. In the bottom half of this dialog, type the word "documentation", and then click Save:

Notice in the pictured example, an autocomplete option is provided for the tag "documentation", as this tag is already in the system.

Next, a user (who is not necessarily part of the community) posts a general microblog update from their My Site containing the hashtag "#documentation":

This update displays in the community because the #documentation hashtag matches the community interest, even though this update was not targeted at the community:
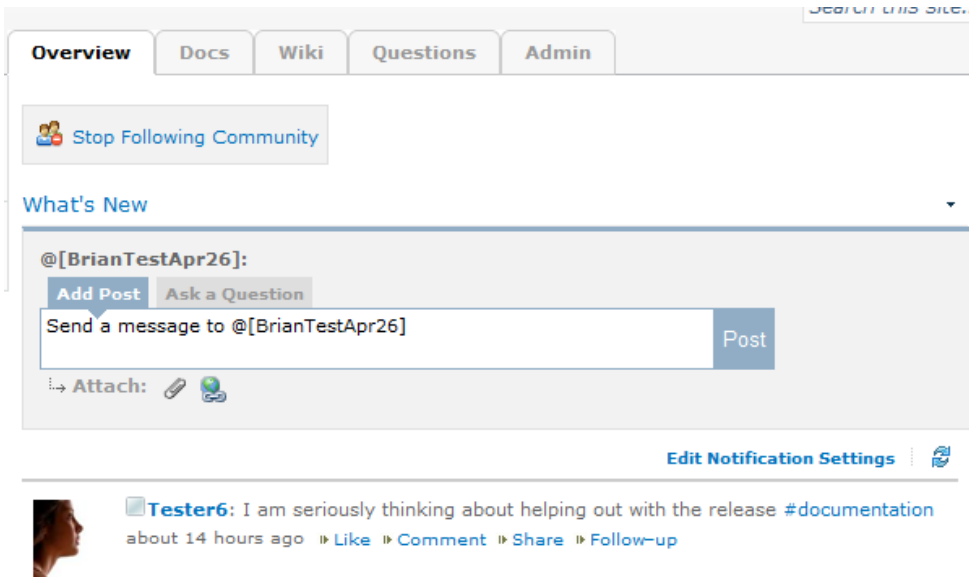
Community Classification

Communities can be classified by applying categorization tags to them. To do this, within the community Admin tab, click the **Edit Classifications and Interests** link:
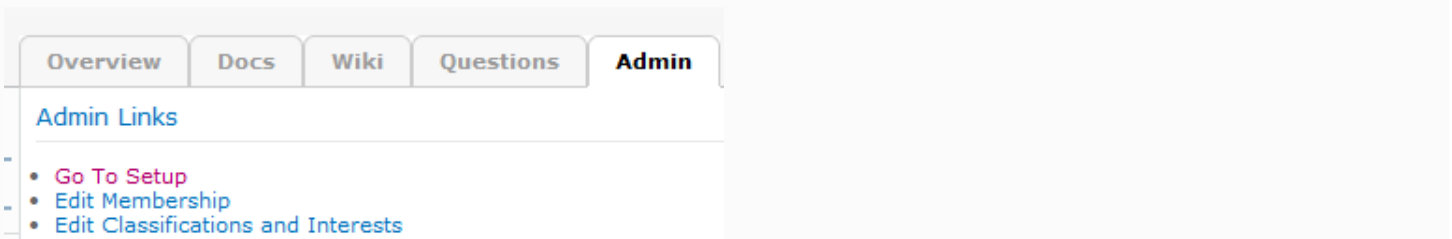
This opens a simple dialog, the top half of which is depicted here. Enter a list of classifications separated by semicolons in this box, and click Save.

Communities sharing the same or related tags can then be displayed together by deploying the **Community Discovery by Tags** web part (available under the **Newsgator Social** web part grouping) and configuring it to list communities of

only a particular category, or matching one of a list of categories. Shown here is how to configure the web part to list only communities categorized with "department":
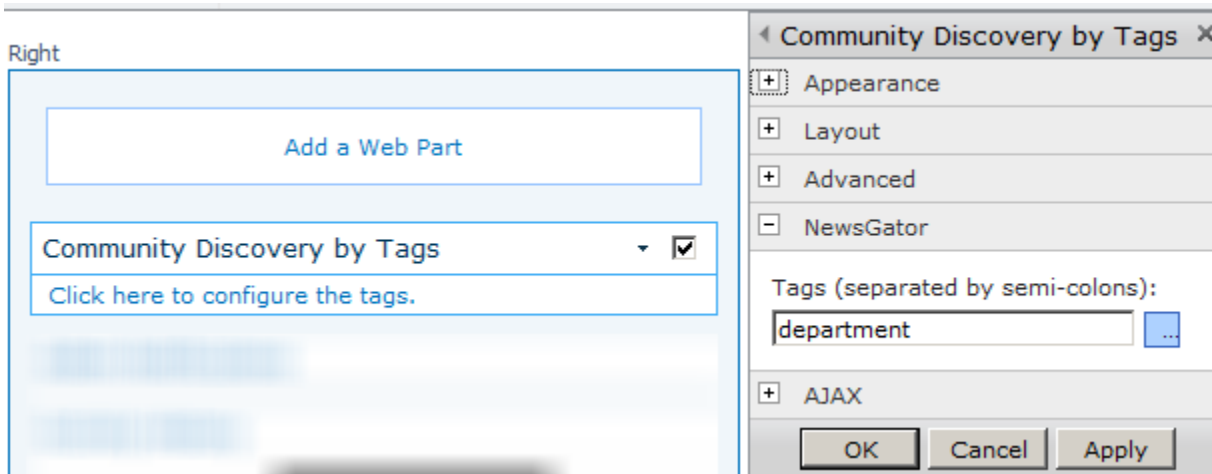
You'll want to also expand the Appearance section and provide a custom title. In the following picture, the web part has been configured with a custom title of "Departmental Communities":
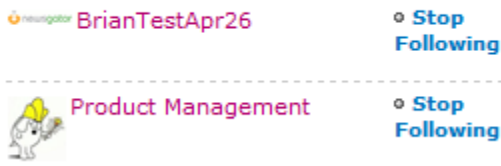
Follow / Stop Following Integration Point

Some companies like to add actions that occur when a user chooses to follow or stop following a community – for example they may want to display a message that welcomes the user and suggests certain actions. Sitrion Social has a javascript integration point to support this.

To bind to the event that is triggered whenever a user joins or leaves a community, write your own javascript code that looks something like this:

$(NG.Events).bind("<triggerName>", function(event, args) { alert(args.currentTarget); });

where <triggerName> = "joinCommunity" or "leaveCommunity" and args holds the original event - args will ONLY have a value when the user is joining a community from outside the community.

If this event is not bound, it will simply move on as if it's not there.

Optional Community Features

Once a community is created, Admins have access to some additional features through the Manage Site Features option.

Enabling rating on all community lists

The **NewsGator Ratings Feature** will enable ratings on all non-hidden lists within the community (versus going to each list and enabling them individually).

Enabling individual document following

The **NewsGator Document Following** site feature provides users the option to follow any individual document within the site. This feature is available in both community and non-community sites.

Frequently, users may want to see if a particular document has changed but not care about an entire document library. SharePoint 2013 implemented a "follow a document" behavior that creates events which Sitrion Social can display in the activity stream. For SharePoint 2010, Sitrion Social includes a feature to let users do the same thing. To take advantage of this, users select the "Follow Document" option from actions menu for the document, when viewed in the document library. Users can come back at any time to stop following the document from the same control.

After a user has selected a document to follow, edits on that document show up both as an activity stream item and as a notification. (By contrast, edits on documents in communities the user follows will show in their activity stream, but without producing a notification.)

Adding tag and note/comment display on community lists

The **NewsGator Keywords Feature** will add a "Tags and Notes" column on the standard tabular list view of non-hidden lists within the community (for Documents, Wikis, Tasks, etc.).
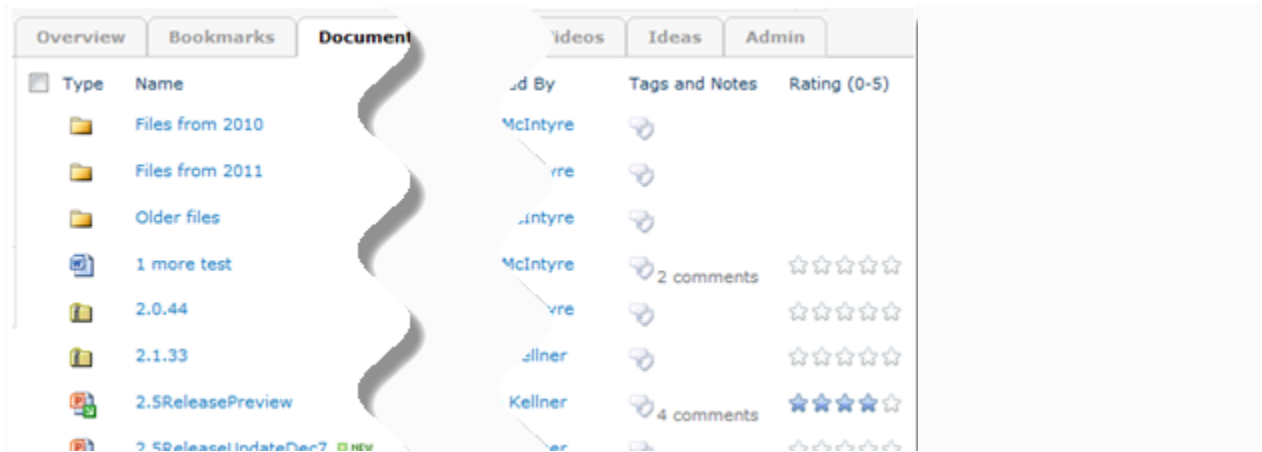
Clicking on the "tag and note" icon in this column brings up the control to view all the tags and comments on the item and to add more. This makes it much easier to add social data to your document and list libraries, and to view the same. (Another easy way to add notes to a list item is if your organization has opted to have comments on list item add or edit events in the activity stream automatically become notes on the list item. See **SharePoint Social Integration Settings section** under **Configuring Farm Settings**, above.)

When displayed in a document library or wiki library, the Tags and Notes column also tells how many notes each document has (referring to them as comments). This makes it easy to find the document-centered discussions in a document library.

Pulling sub-site activity into the community stream
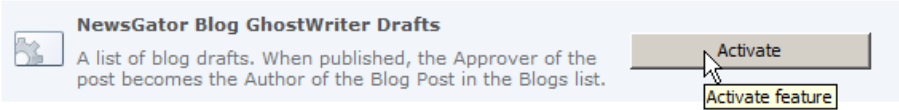
The **NewsGator Community Context** feature allows an administrator to include any sub-site within the context of the Community. This means that events on lists within the sub-site will generate activity stream items.
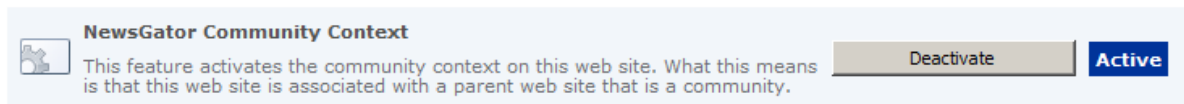
Blog "Ghostwriting"

In many organizations, a leader may have another person draft a blog post. The leader then reviews, edits (if necessary) and approves the blog post. The point of this exercise is to let an organizational leader express views and let users within the organization respond to those views. The "ghostwriter" feature makes this process easier.

To activate this feature, you must access the site features page of the blog site and activate the **NewsGator Blog GhostWriter Drafts** feature.

1. Go to the community tab that hosts your blog site.	
2. When on the blog tab, click **Site Actions**, then **Site Settings**.	
3. Click **Manage site features** on the settings page.	
4. Click the Activate button by the **NewsGator Blog GhostWriter Drafts** feature.	

When this feature is enabled, a new drafts list is added. The original author creates the new blog post in this drafts list. When the draft is saved, the "on behalf of" field can be completed.
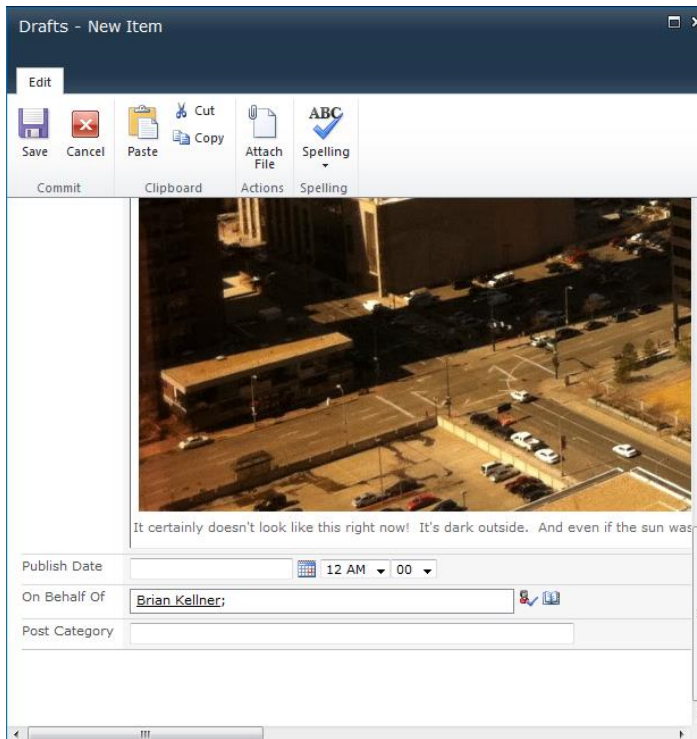
A notification email and a stream event are sent to whomever is specified in the "on behalf of" field.
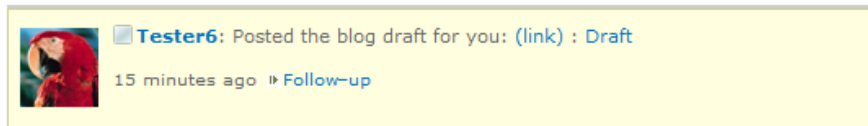
Note: The author can also specify categories (tags) for the blog post in the draft saving screen without having to add them to a separate list in advance.

When the approver goes to the drafts list, all the draft posts are displayed.
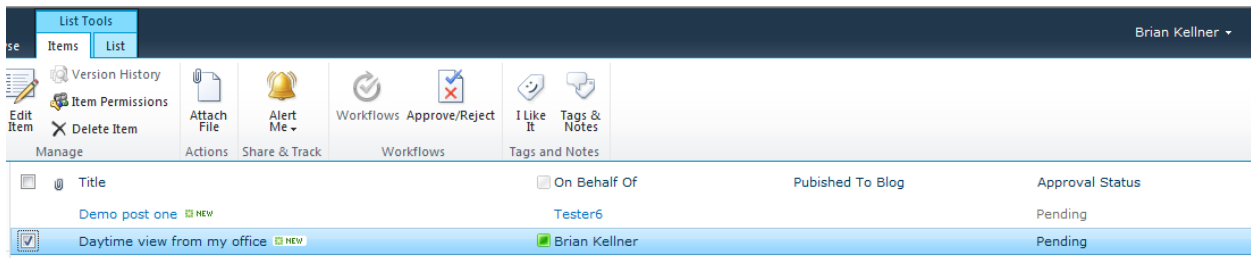
After selecting the post, clicking the "Approve/Reject" button gives the option to approve the post. When the post is approved, it is published as being written by the approver. This means that both the blog post and the activity stream event for creating the blog post are shown as being done by the approver.

Moderating a Community

Removing Items from a Community's Stream

A community owner can choose to hide an activity stream item that is displaying in her community. Sitrion Social still provides the ability for a user to delete their own items, and it allows some users to be granted global delete rights. This capability means that a community owner can "delete" any item that is displaying in her community activity stream. The user must do this from the community activity stream part. In the example screenshot below, a post was created by Tester6 and is being deleted by Tester9 within the Product Management community.
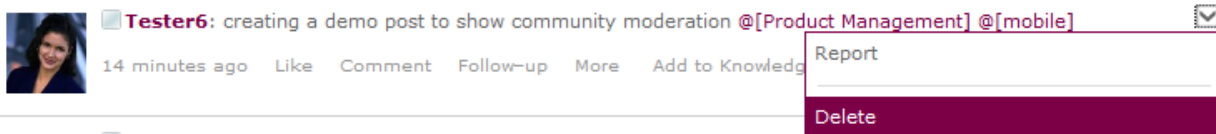
Pinning Items to the Top of a Community's Stream

A community owner can choose to pin one or more activity stream items to the top of the community stream. The control for this is in the "more" menu on the activity stream item. Only community owners (and moderators starting in 5.3) will see this option, and it only appears for items that do not appear in other community's streams. (Note that an item may appear to be targeted to only one community, but if it contains a hashtag that has been declared as an interest of another community, it will appear in that other community's stream and thus will not be available to pin.)

When an item is pinned to the top of the community stream, it gets special styling so users understand why it does not move down the stream.
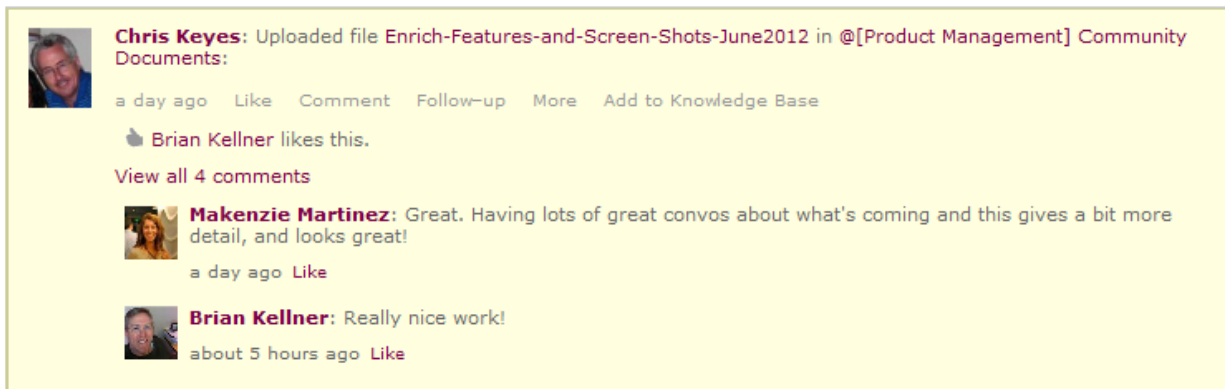
The item will stay pinned to the top of the stream until it is "unpinned" from the "more" menu.
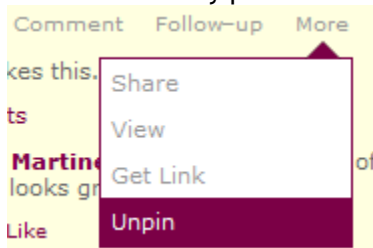
Even though the item is pinned within the community activity stream, a user viewing it from the Lookout page or the personal activity stream web part will not see the item pinned in those places.

Answer Turnaround and Quality

To ensure users get answers to their questions in a timely manner, users can be declared to be a curator and/or a community expert.

A **curator** is a user who receives emails alerting to questions that have been unanswered. Curators can be specified at both a global level (for questions not directed to any community) and for each community.

An **expert** is a user who is visually identified to all users as an expert within that community. This identification appears in any response they give in the community stream, and also on their mini profile card.

The same person can be declared both a curator and an expert, and it is often desirable to do so.

There is also the implicit role of a question **Asker**. After a question receives a response and then a configurable length of time goes by, the person who asked the question (the "Asker") will receive an email prompting them to indicate which answers are good answers. They can mark an answer as a good answer directly from this email and also from digest and notification emails. Marking answers as good answers helps with answer quality and provides recognition to the answerer.
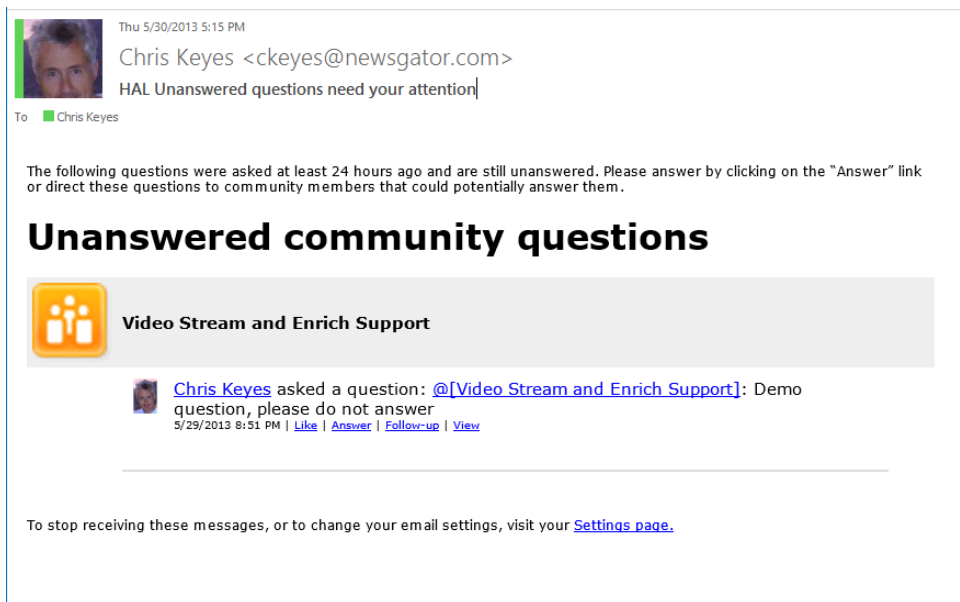
Curators, experts, and question askers all can mark an answer as good. This helps to ensure answers get "closed out" with a good answer.

The following chart summarizes these three roles.

	Curators	Experts	Askers
Identified in their responses and in mini profile as an expert		X	
Receives unanswered questions email	X		
Receives email prompt to mark answers as good			X
Can mark answers as good answers	X	X	X

Examples

Here is a sample unanswered questions digest that a community curator would receive:
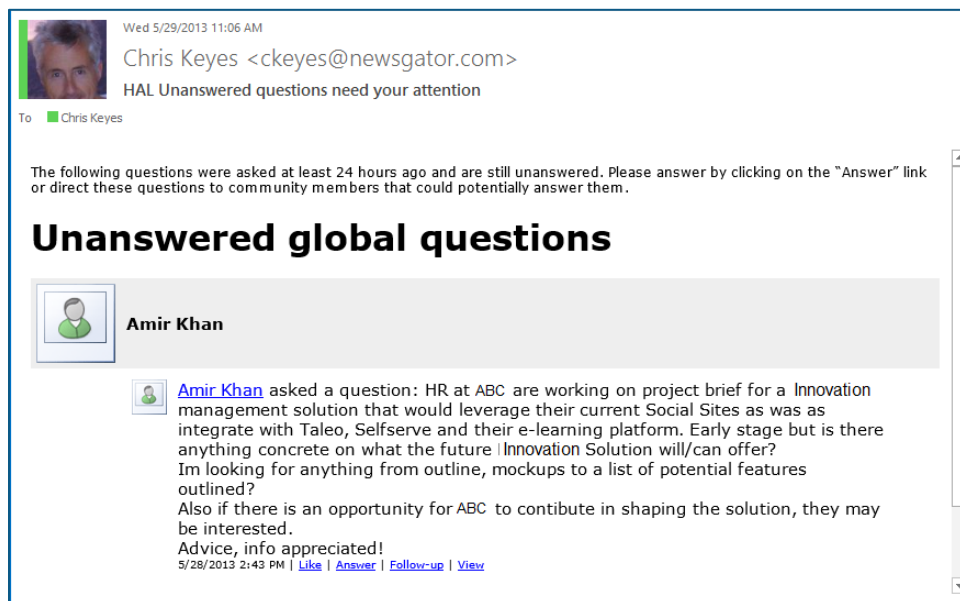
Here is a one that a global curator would receive, for questions that have no community:

Here is a sample email to a question asker prompting them to mark answers as good answers:

When a community expert answers a question (or adds a comment), the expert label (Olympic-like medal) is visible on their avatar. The bolded text "(Expert)" also appears just after their name:

The profile mini-card shows which communities the person is an expert in:

Granting Curator and Expert Roles

Community curators and experts are designated from the Members tab in communities by the community owner. The "Edit" link on the far right must be clicked before the boxes granting these statuses can be checked.

Avatar	Name	Community Role	Community Badges	Is Following	Following Since	Is Curator	Is Expert	Actions
	Christian Boult	Owner	No community badges.	✓	Thursday, April 11, 2013 9:53:29 AM	✓	✓	Edit
	Nate Hollingsworth	Member	No community badges.	✓	Monday, April 8, 2013 9:51:36 AM	✓	✓	Edit

Global curators can be specified in Central Administration (Service Applications > NewsGator Social Platform > Manage Global Q&A Curators) as seen below. See the **Manage Global Q&A Curators page** section earlier in this guide.

Setting the Notification Email Timing

The notification process has configurable parameters to determine both how quickly to notify the curators and how quickly to notify the original asker of the question to have them identify the good answers. These can be edited on the Jobs Configuration page time (see **Configure Job Settings** above).

Unanswered questions notification job

Q&A curators will receive a notification email for questions that have not been answered in the specified number of hours. Askers will receive a notification email prompting them to mark good answers after the specified number of hours.

Q&A curator notification time span in hours

```
24
```

Asker notification time span in hours

```
24
```

Opting out of reminder emails

Individual users can opt out of receiving these email notification messages. The options are found in their Settings dialog, by going to the **notifications** tab within this dialog and then clicking **digest**. The first option is only visible for users who are curators in at least one community.

activity stream

notifications

news

subscriptions

digest instant

on/off

☑ receive 24-hour digest email

questions

☑ receive unanswered questions emails (q&a curators)

☑ receive a reminder email to mark answers as good

SharePoint Workflow Integration

To make it easier to interact with Sitrion Social from SharePoint Workflow, workflow actions are available that can be used from SharePoint Designer. This lets administrators do things like post events to the activity stream based on a SharePoint workflow. This capability supports SharePoint Designer 2010 working on SharePoint 2010. Support may be extended for SharePoint 2013 Designer in the future.

You need to work in SharePoint Designer to take advantage of these capabilities. In the example below, we're sending a message in the activity stream to a reviewer based on an attribute of a list item when it is created.
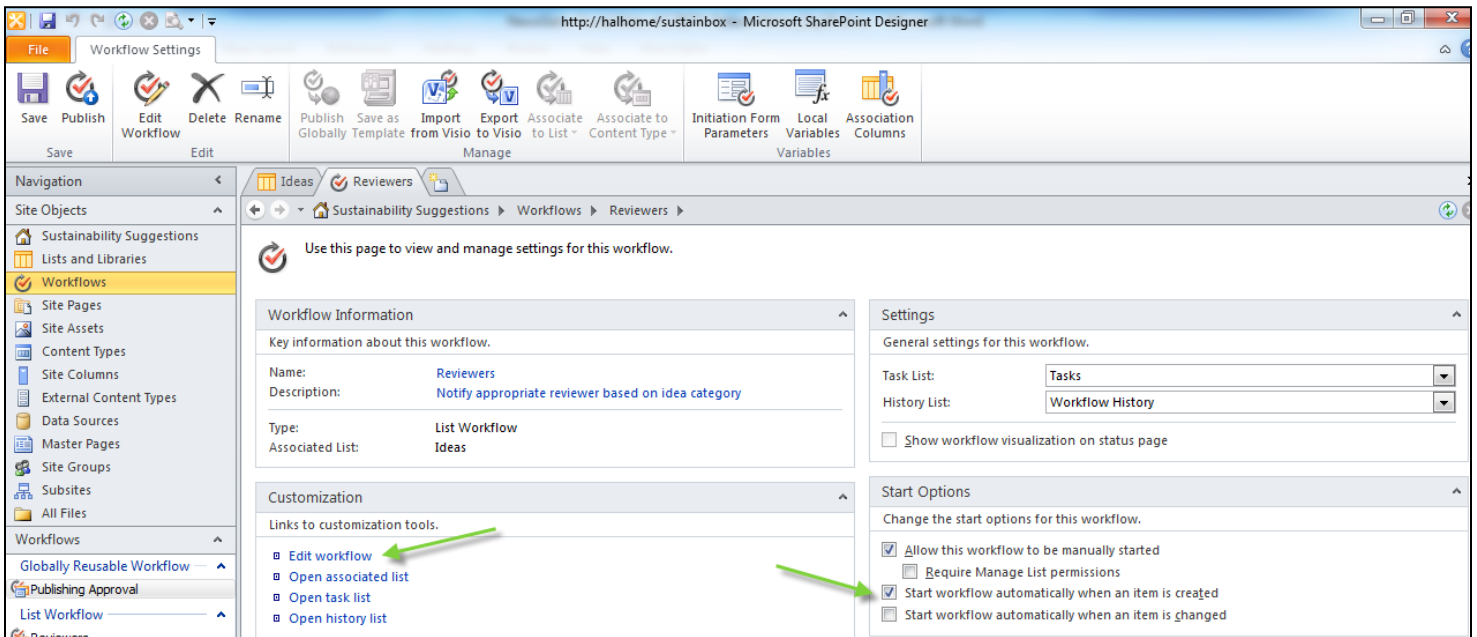
This specific use case is to notify a person of a new suggestion (part of the Innovation Solution functionality) that needs to be reviewed. Each suggestion idea has a Category field, so depending on the value the user picks when they create the idea, we want to send a different reviewer a notification.

Setting up the condition part of the workflow is no different than any other SharePoint workflow.
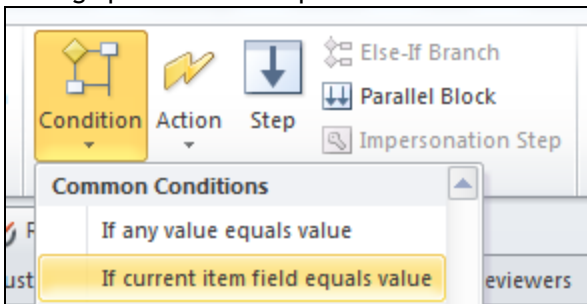
So in this case, we're picking ideas about environmental impact.
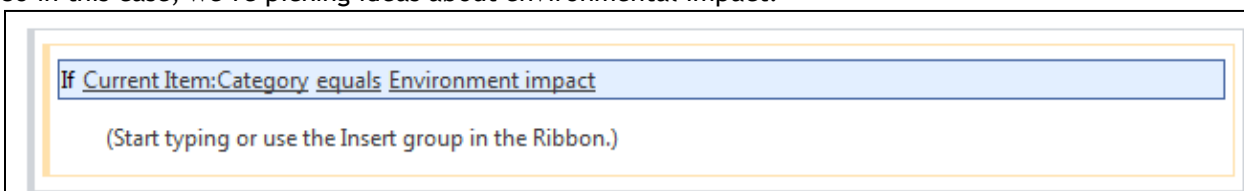
When we go to select actions, we can see a new set of NewsGator options.
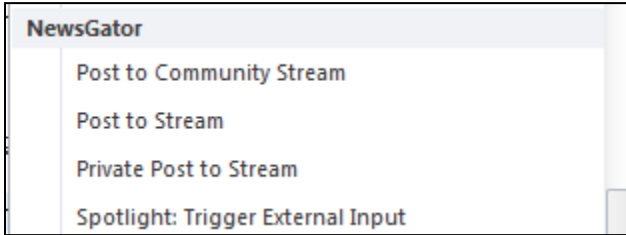
If we select the "private post to stream" option, it looks like this.

Clicking on "this text" we can specify simple text or use the string builder to put together the whole message.
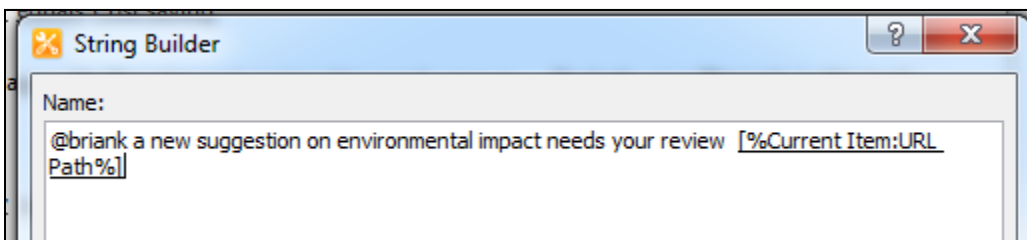
Workflows are saved and published like normal. Then when a new idea is added that is about Environmental Impact, our reviewer gets a private message in the activity stream.
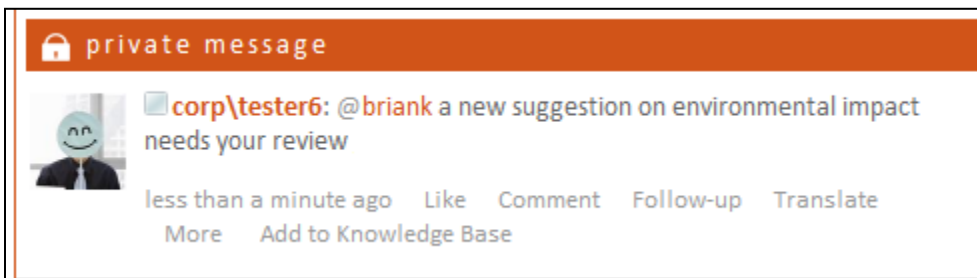
Note: As of the 5.3 release, two new capabilities may be available for community owners. If the customer has the internal communication solution installed, there will be a "Manage Meetings" link visible in the Admin tab that gives access to the "Townhall Meeting" functionality. See the 5.3 Release Notes for full documentation.

As of the 5.3 release, all communities now have the "Archive" control available from the Setup page.

Archive Community

In many cases, when a community has reached the end of its useful life, customers want a standard way of closing it down. The archive feature automatically sets the community in a state where it is effectively hidden. This feature does not change the SharePoint site related to the community. If your standard process includes deleting the site or modifying the lists and libraries, you can still perform those steps manually.

The archive control is located at the bottom of the community setup page.

Archive Community

Archive this community if it should no longer be used. This cannot be reversed.

Archive

OK

Clicking the "Archive" button brings up a confirmation dialog.

archive community? ✕

this will archive the community. users will no longer be able to follow or target messages to this community. this should only be done if the community will never be used again. this cannot be reversed. do you still want to archive this community?

yes   cancel
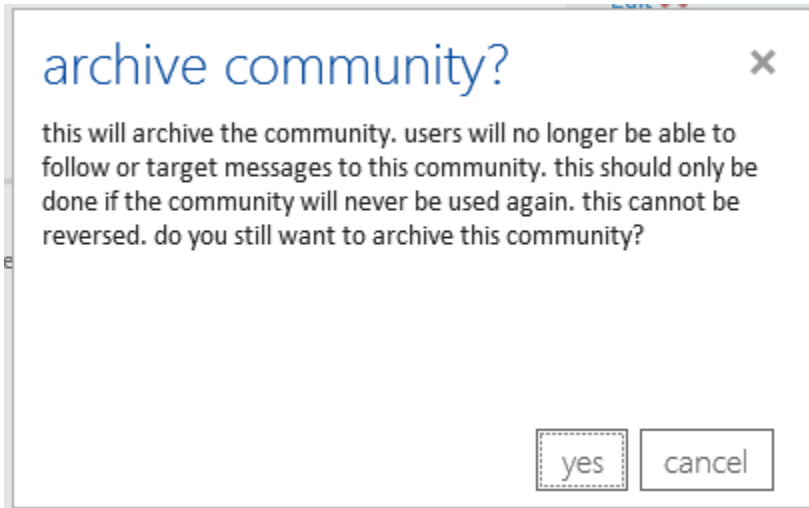
Confirming this dialog causes the following things to happen:

-       Unfollow all users

-       Remove any notification subscriptions (daily, instant for new microblogs, etc)

-       Set the community to not discoverable

-       Disable the follow and unfollow controls

-       Set community to "read only" mode

-       Prevent audience-based syncing from re-adding members

-       Prevent targeting the community

-       Mark the community as "archived" to allow it be screend out of engagement scorecard reports

Spheres Functionality

Configuring a Sphere

Sphere membership and other settings for a sphere can only be edited by the owner of the sphere. A sphere may have only one owner at any given time. Initially the owner is the person who created the Sphere. If the owner has the **Sphere Administration** permission in the NewsGator Social Platform service, that owner can give up ownership of the sphere by transferring that ownership to somebody else.

Transferring Sphere Ownership

Spheres owners that have the **Sphere Administration** permission in the NewsGator Social Platform service can transfer ownership of their spheres to someone else by following the instructions in **Administration of Sphere Ownership**, far below.

Setting Sphere Followership Based on a SharePoint Audience

This capability is almost exactly the same as described above for communities, however both public and private spheres can have followers set via SharePoint Audience. The ability to do this is still controlled by the "Manage Audiences" permission on the NewsGator Social Platform Service.

The creation flow for spheres has been changed slightly. The first step is to choose a public or a private sphere.

If a public sphere is chosen, the options for adding followers are notifying people via email or using an audience. If the Audience option is chosen, the same choices for selecting or creating an audience as seen in a community are displayed.

NOTE: In the 5.1 release, there is now an option for the person who is creating a sphere to automatically be set to following the sphere when it is created.

Note that the other community options (read only and disable follow/unfollow) are also shown here. These choices work the same as described above for communities. They can be adjusted after the sphere is created from the manage options for the sphere. In all other respects, the process for selecting or creating an audience works the same as described above.

If a private sphere is selected in step one, the flow is identical except the alternate option to using an audience is to select members individually (the same mechanism allowed when spheres were originally released in version 2.1).

The management tab for spheres reflects these capabilities. Clicking on a private sphere that uses a distribution list displays these options.

Name	Create Date ⌄	Owner	Action
PrivSphereForDocsJan29	1/29/2012	Brian Kellner	❌ 👥 **Stop Following**

☐ Allow only owners to post to this Sphere
☐ Disable Follow and Unfollow Controls
Select an audience to manage followers:
DemoTrain25Monday ▾

Save | Cancel | Remove Audience

Similarly, a public sphere using a distribution list shows the same options.

Note: Public communities that do not use distribution lists for membership do not have the options to be set to "read only" or to not show the follow/unfollow links.

Lookout Page

☞	FIND MORE INFORMATION:
	Sitrion Social v5.5 User Guide with Web Part Summary
	Sitrion Social v5.5 Release Notes

Enabling the Lookout Page

The Lookout page can only be deployed within the My Site. This is so that other features within Sitrion Social will know where to find the Lookout page. To deploy, go to the site collection features page of your My Site site collection and activate the feature below to add the Lookout page. (Deactivating this feature will delete the Lookout page from the My Site site collection.)

Setting the My Site link to display the Lookout Page

Because Lookout is meant to be used by end users as a primary starting page, it makes sense to redirect the standard My Sites link to go to it. To make Lookout the home page of your My Sites, browse to it (http://{MYSITE}/Lookout.aspx). Then on the Page ribbon, select **Make Homepage**.
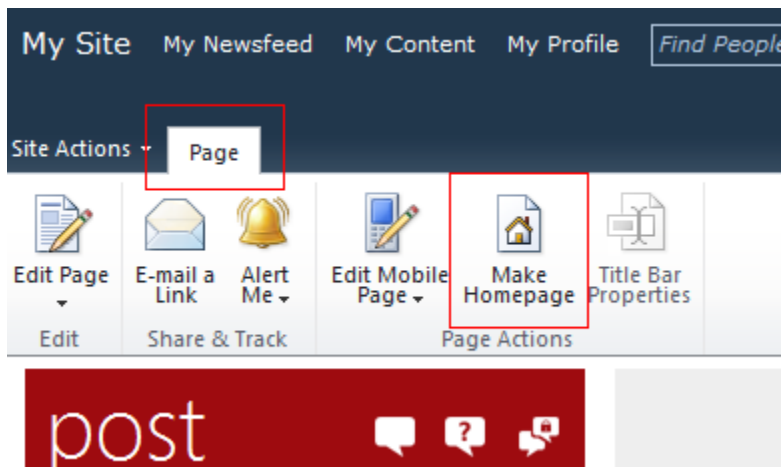
Assigning Lookout Tiles to Groups of Users using Tile Sets

The Lookout interface gives users a great deal of control over the activity stream. By default, Lookout starts users with several tiles to help them take advantage of the capabilities. The Tile Sets capability was created because different kinds of users can require different kinds of starting configurations, and because administrators may want to use Lookout as a channel to deliver important information.

Tile Sets are defined by audience (SharePoint audiences may, in turn, be defined based on email distribution lists, active directory security groups, or SharePoint user profile properties). One tile set may be applied to each audience. The feature is designed for a complete tile set to be defined for each audience and not to have users in multiple

audiences for which you've defined tile sets. If a user is a member of multiple audiences which have tile sets defined, the first tile set will be applied and the rest will be ignored. If a user already has several tiles selected, the new tiles in the tile set will be added at the top of the tiles on the left side. Otherwise, the tile set will be the complete set of tiles for the user.

Tile Sets can be created by users with the **Manage Dashboards** permission on the NewsGator Social Platform service application in Central Admin (see the **Permissions for global capabilities** section below for details on how to grant this permission). These users will see an "admin" link on the Lookout page:
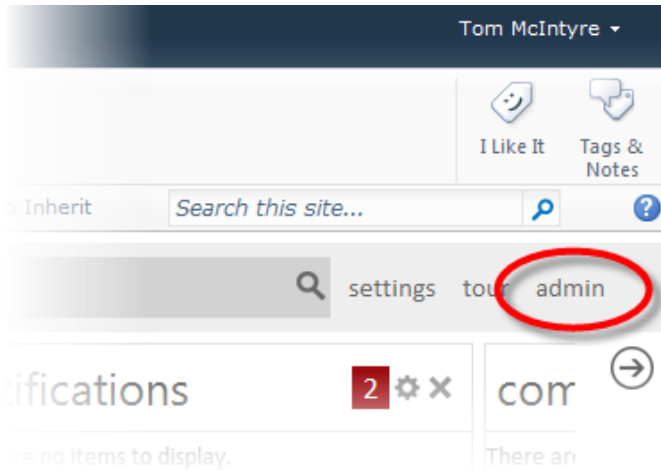
Clicking this link displays a dialog with the option to add or edit a tile set.

To begin creating a new tile set, click "**add**" in the navigation control at the top of this dialog. This allows selecting the related SharePoint audience and picking a title for the tile set (which defaults to the audience name). Click the **add** button below to create the new tile set. The tile set is not ready for use yet; you must still specify some tiles to go into it.
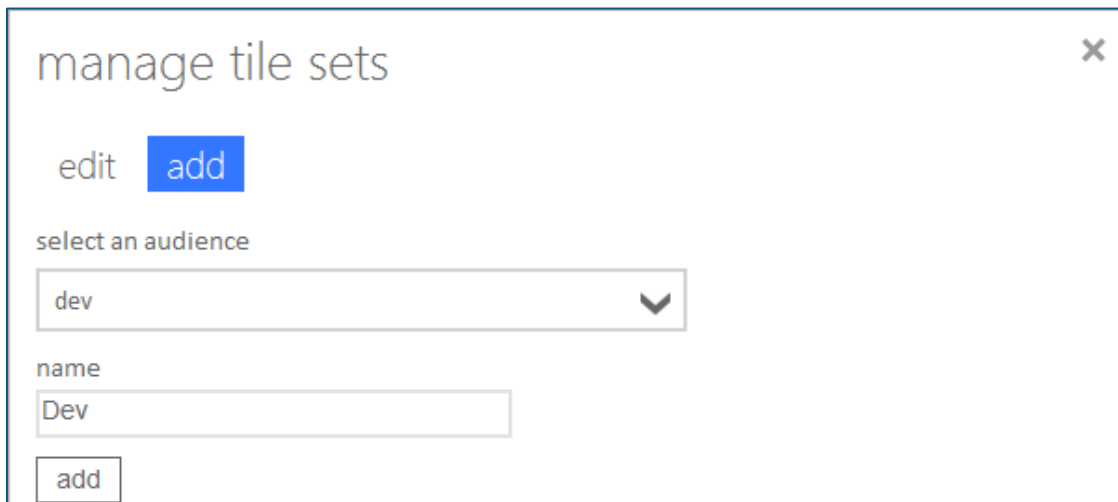
Editing a tile set allows selecting the tiles that will be included within it. Click "**edit**" in the navigation control at the top of this dialog to see the tile sets that are available for editing. The **update** button is for committing edits to the tile set name only; all other edits here are applied instantly without needing to click "update".
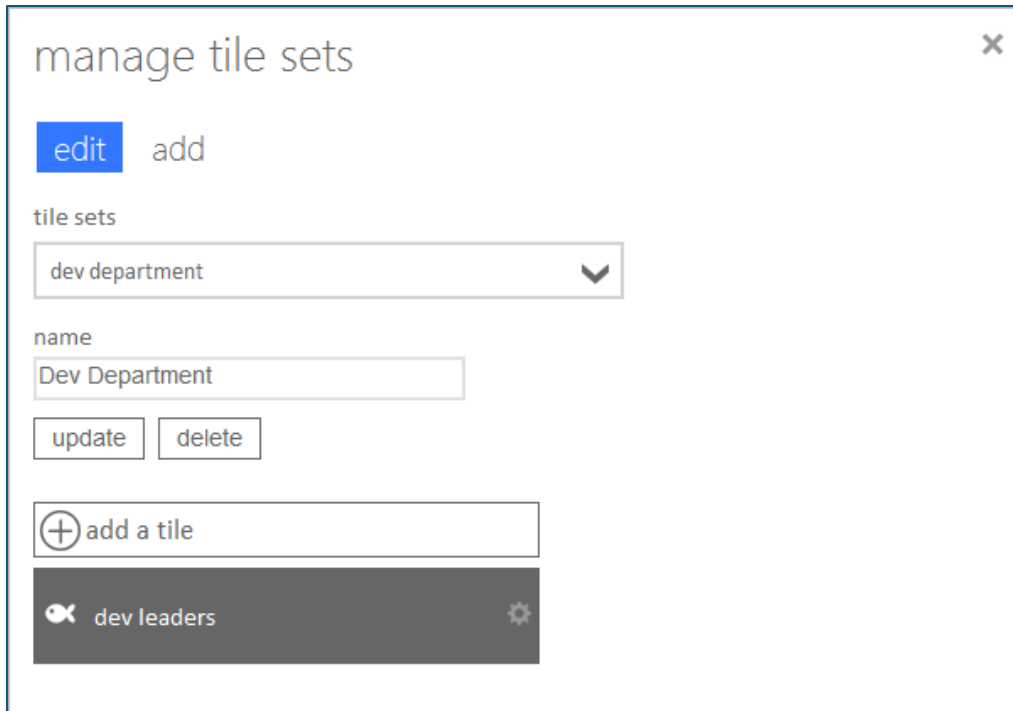
Tiles will be added for the user in the order listed in the tile set, and are listed in the order in which you create them. After creation, a tile set tile may be edited or deleted by clicking its gear icon. (To escape from this options menu without making changes, re-click the gear icon.)
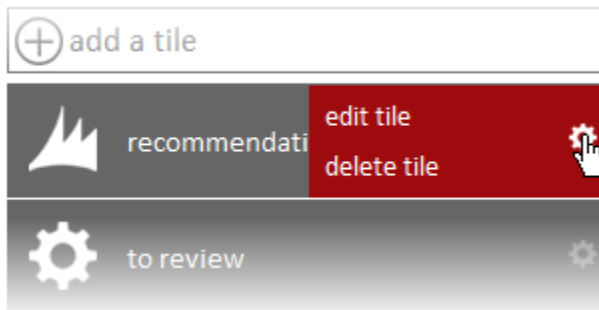
While being created or edited, a tile set tile may be specified as "locked". This means that the user cannot remove or edit that tile.

In addition to adding the tiles, each tile may have some types of configuration allowed. For example, if a "person tile" is added, then the people who are being followed can be defined for this tile. For subscription tiles, if feeds have been subscribed to the same audience that the tile sets is defined for, those feeds will automatically be added to the subscription tile.
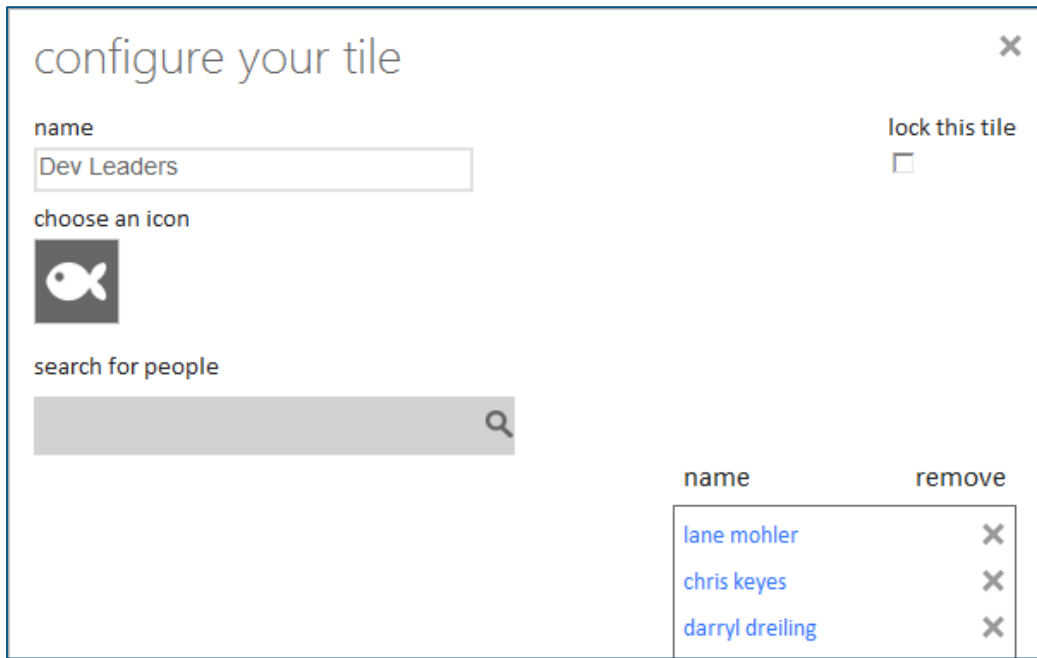
NOTE: In later releases, the word "tile" was changed to "stream" based on usability testing.

Web Parts on Lookout

In some companies, there is a need to ensure certain information is always visible. To meet this need, in all versions since 4.0 of Sitrion Social, the Lookout page supports adding web parts in one of two zones (either to the left or to the right of the main stream).
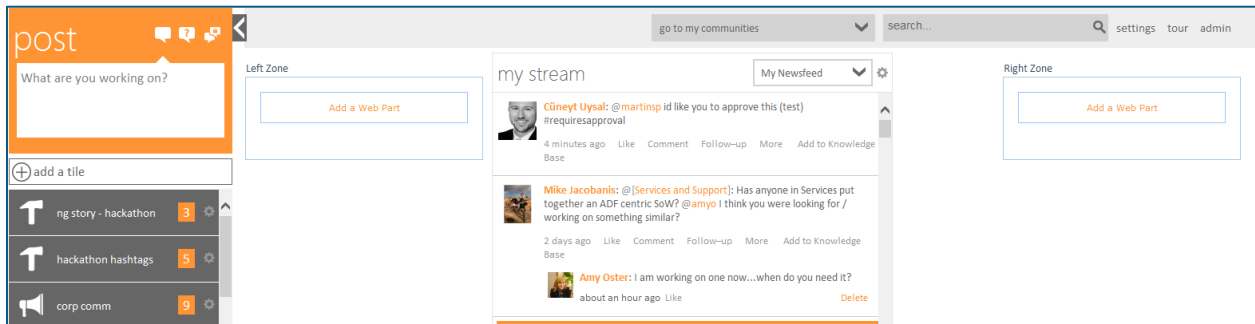
Below is an example with the Spotlight Leaderboard web part added in the right zone.
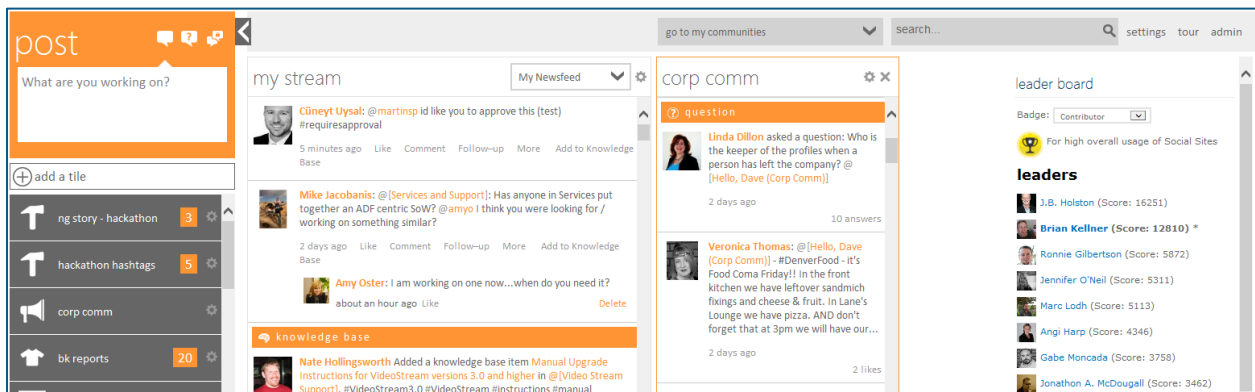
Lookout Mobile Web

Lookout Mobile Web provides many of the same features as the main Lookout Page in Sitrion Social. The main goals are to let users view and respond to stream items as well as posting microblogs, questions and private messages.
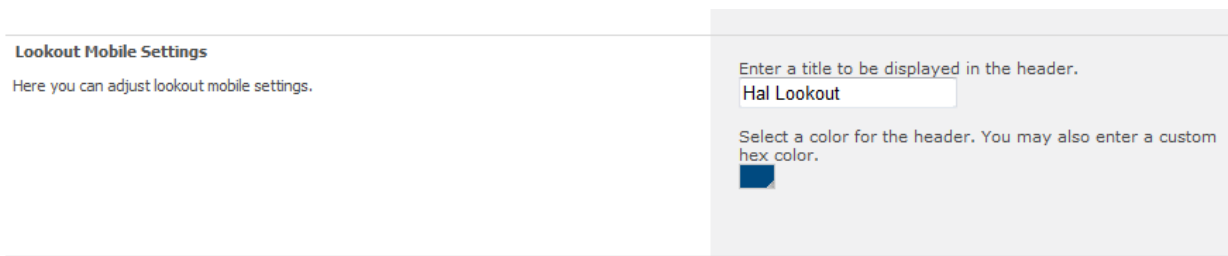
The Lookout Mobile Web interface is an HTML5 solution aimed at those users who are unable to leverage the Sitrion Social Sites native mobile apps for whatever reason. Your Lookout Mobile Web site is bundled with Sitrion Social server and can be accessed from a mobile browser at https://[your sitrion social instance]/_layouts/mobile/ng/

Lookout Mobile Administration

Setting up the Sitrion Social Icon

Lookout Mobile Web has two settings. They are accessed in Central Admin by going to the NewsGator Social Platform Service and selecting Mobile Settings. The settings at the top of the page refer to native mobile clients.

The title setting is intended to give a simple branding experience to help users know this interface is part of their broader intranet / Sitrion Social deployment. For example, at NewsGator, the intranet is named "Hal", so here we use "Hal Lookout" as the title in the mobile browser.

Lookout Mobile Settings

Here you can adjust lookout mobile settings.

Enter a title to be displayed in the header.

Hal Lookout

Select a color for the header. You may also enter a custom hex color.

The color option gives a simple way to make the header color match a standard color you use on your intranet.

Integration with Other Web Pages

Using JavaScript to embed a three-function social control on web pages

Some organizations want to extend the reach of social features beyond SharePoint. Sitrion Social includes a simple way to do this. By inserting two lines in a web page, a social section can be displayed that lets users note, tag and share the page into the activity stream. These two lines just need to have the SharePoint server where Sitrion Social is installed specified.

<div id="ngSDFrame" SPUrl="http://[SERVERNAME]" height="300px"></div>

<script src="http:// [SERVERNAME]/_layouts/ng/script/sdinit.js" type="text/javascript"></script>

When the page is displayed, a three-tab control is displayed (in the bottom-right in this example).

As shown in the screenshot, the Share function supports auto-complete to allow targeting this page to specific colleagues and communities. Sharing creates an event in the activity stream with the URL of this page and any comment added by the user when she shares.

The Notes and Tags functionality interact directly with SharePoint in the same way that the built-in browser favorite from the Tags & Notes page on the user profile works. When a user adds a note, it is stored directly in SharePoint connected to the URL of the web page. The five most recently added notes will display below the note entry box.
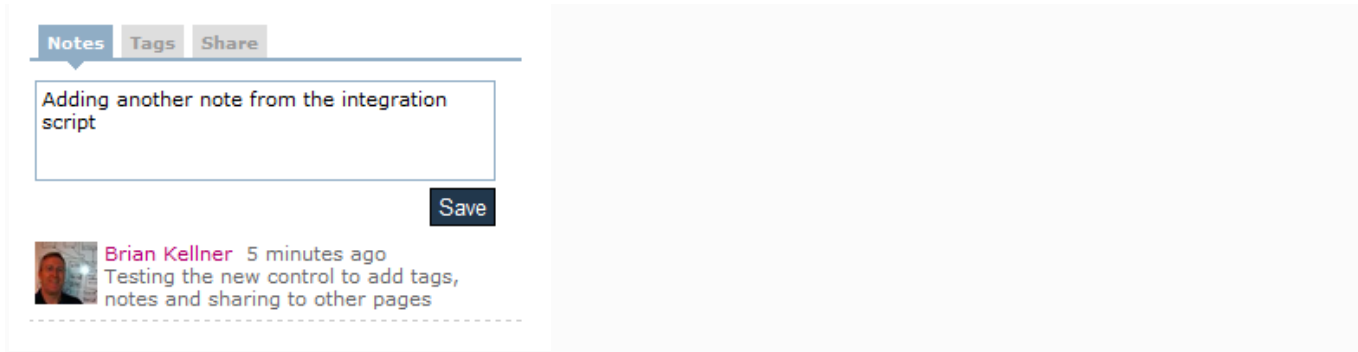
The tag function auto-completes with suggested tags.
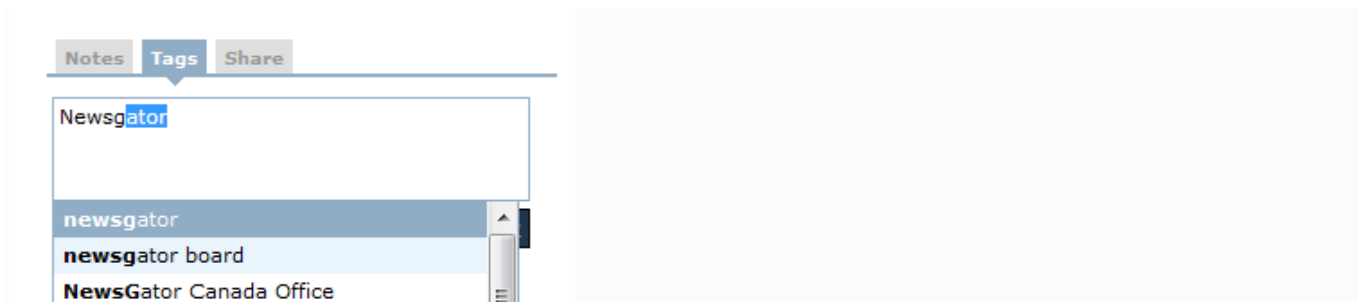
All three actions (note, tag and share) will create new activity stream events.

NOTE: This feature uses the built-in SharePoint Tags & Notes functionality. Microsoft is deprecating this functionality starting in with the SharePoint 2016 release. We recommend not using this capability if you plan to move to SP2016 in the near future.

Note that starting with the 4.5 release, the StreamAnywhere functionality is available. This provides a great deal of flexibility in displaying different stream views on other web pages. Documentation is in the product at:

http://[SERVER_NAME]/_layouts/ng/script/stream/default.html

Web Part Deployment

☞	FIND MORE INFORMATION: Sitrion Social v5.5 User Guide

Many web parts are deployed automatically as part of a new community or to user's MySites. Others must be added to a page by selecting them from the web part gallery. Not all Sitrion Social web parts will be available in the gallery by default. Certain site collection features need to be activated before many Sitrion Social web parts will be available for deployment on the sites of that site collection. These are spelled out below.

The Pivot Viewer web part also requires a site feature be activated before it will work. There is also an extra configuration step that will likely be required after the web part is deployed. This is explained below in the **Installing the Pivot Viewer Web Part** section.

Adding Sitrion Social web parts to the web part gallery

To add all Sitrion Social web parts to the web part gallery, you may need to activate up to five site collection features.

1. From any site in your site collections, in the Site Actions menu, click Sites Settings.	
This brings up the Site Settings page. 2. Click **Go to top level site settings**. 3. Then click **Site collection features**.	
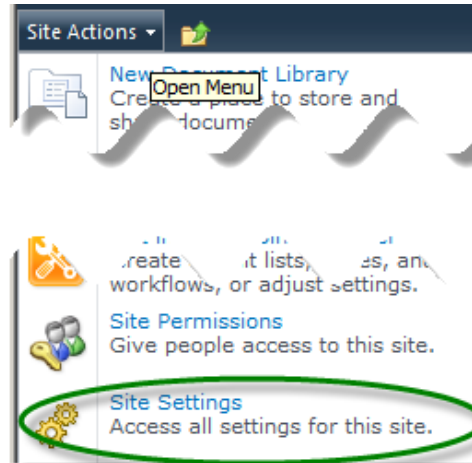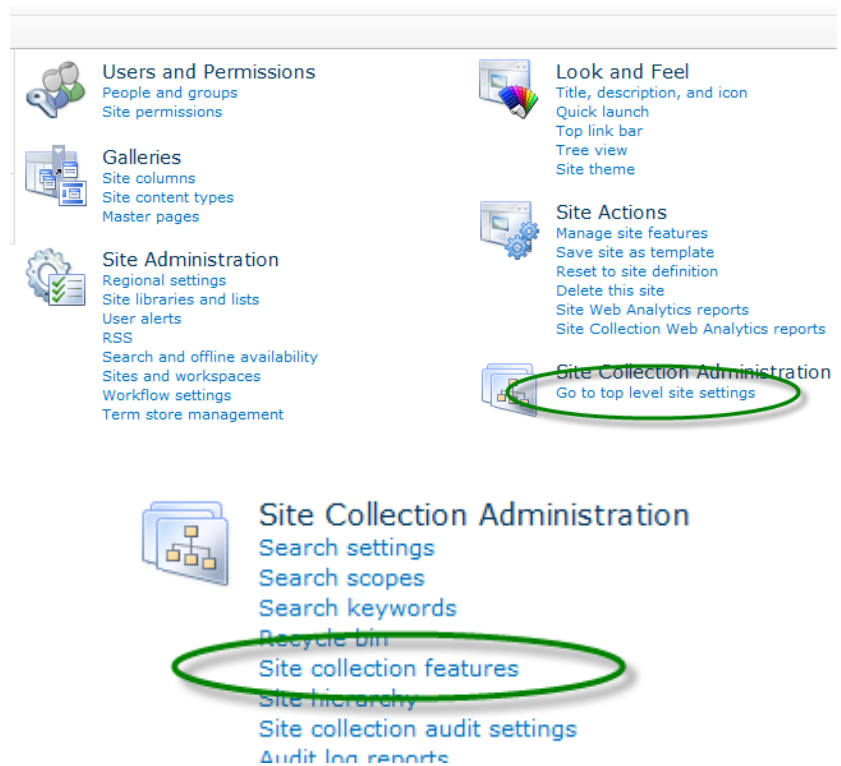
4. Activate the following five features:

   NewsGator Community Web Parts

   NewsGator News Stream Web Parts

   NewsGator Pivot Viewer Web Parts

   NewsGator Social Web Parts

   NewsGator Spotlight Web Parts

Below are lists of which web parts each of these features activates.

NewsGator Social Web Parts Feature

The NewsGator Social Web Parts feature adds the following web parts to the NewsGator Social category in the web part gallery of your site collection:

Web Part Name	Released in version
Activity Stream	1.0
Activity Stream Community Filter	2.0
Activity Stream Hashtag Filter	2.0
Activity Stream User Filter	2.0
Colleagues	1.1
Communities	1.0
Communities Overview	1.1
Community Discovery by Tags	2.0
Community Portal View	3.5
Documents Followed	4.0
Getting Started	1.1
My Activities	1.0
My Communities	1.0
My Communities	1.0

Recently Active	1.0
Recently Created Communities	1.1
Recommended Communities	1.0
Social Sites User Profile	1.0
Trending Tags	3.5
Who's Following Me	3.0
Question Center	5.1

NewsGator Pivot Viewer Web Parts feature

The NewsGator Pivot Viewer Web Parts feature adds the following web parts to the NewsGator Social category (same as the above) in the web part gallery of your site collection:

Web Part Name	Released in version
Activity Stream Pivot Viewer	2.0
Community Activity Stream Pivot Viewer	2.0

Please see **Installing the Pivot Viewer Web Part** section below for complete instructions on installing the Pivot Viewer web part.

NewsGator Community Web Parts feature

The NewsGator Community Web Parts feature adds the following web parts to the NewsGator Community Web Parts category in the web part gallery of your site collection:

Web Part Name	Released in version
Activity by type	1.0
Activity History	1.0
Administrative Notifications WebPart	1.0
Community Actions Webpart	1.0
Community Activity Stream Web Part	1.0
Community Members	1.0
Export Report	3.5
Follow Community	1.0
Invite Others to Follow	2.1
Latest Blog Posts	2.5/2.6
Quick Admin	1.0
Top Users Activity Report	1.0
Trending Community Tags	3.5
User Detail Report	2.1
VCard	2.0

NewsGator News Stream Web Parts feature

The NewsGator News Stream Web Parts feature is only available if you have the optional News Stream module installed. It adds the following web parts to the NewsGator News category in the web part gallery of your site collection:

Web Part Name	Released in version
News Query	1.2
News Search	1.2
News Subscriptions	2.0
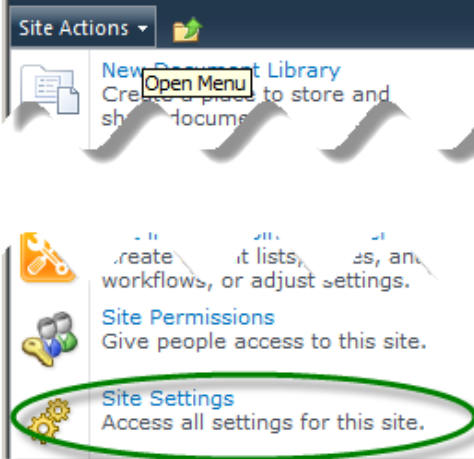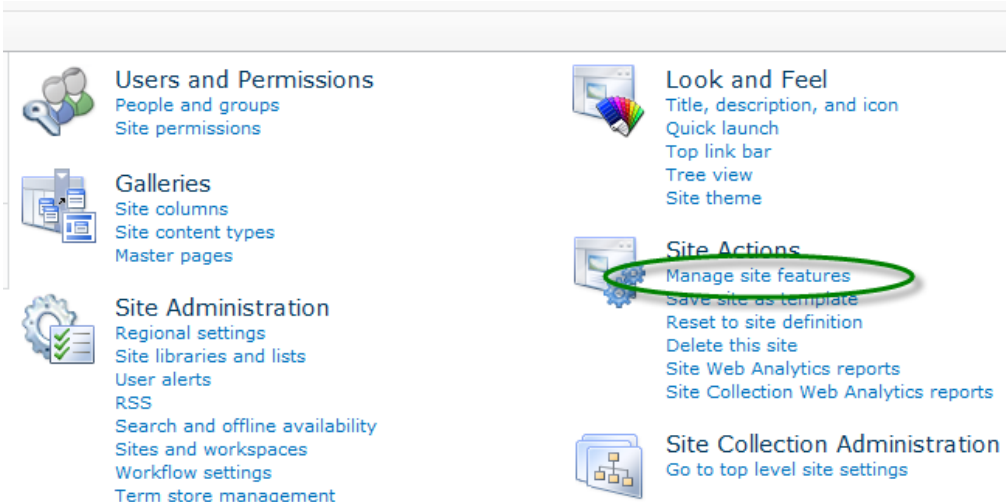
NewsGator Spotlight Web Parts feature

The NewsGator Spotlight Web Parts feature is only available if you have the optional Spotlight module installed. It adds the following web parts to the NewsGator Spotlight Web Parts category in the web part gallery of your site collection:

Web Part Name	Released in version
Areas of Expertise	2.0
Available Badges	2.0
Earned Badges	2.0
Expertise Search	2.0
Leader Board	2.0
Spotlight Expertise Browser (Silverlight)	2.0
Give Personal Badges (was Kudos through 4.1)	2.5
Earned personal Badges (was Earned Kudos Badges through 4.1)	3.0
Spotlight Expertise Browser (HTML)	3.0
Give Personal Badges to people	5.1
Endorsements web part	5.2

Installing the Pivot Viewer Web Part

Before deploying a Pivot Viewer web part to the site of your choice, you need to activate a site collection feature. After deployment, some extra configuration will most likely be necessary.

1. From the site on which you want to deploy the Pivot Viewer web part, in the Site Actions menu, click Sites Settings.	
This brings up the Site Settings page. 2. Click **Manage site features**.	
3. Activate the NewsGator Pivot Viewer Silverlight Client feature.	
4. Return to the site, and edit the page.	

5. Click **Add a Web Part**. 6. Select the **NewsGator Social** category. 7. Select the **Activity Stream Pivot Viewer** web part. 8. Click **Add**.	
9. At this point you will most likely see the following. If this is the case, you'll want to copy the site path portion of your URL, as shown, then from the web part menu click **Edit Web Part**, or just click the **Open the tool pane** link provided in the message.	
10. Click the **Configure...** button in the tool pane.	
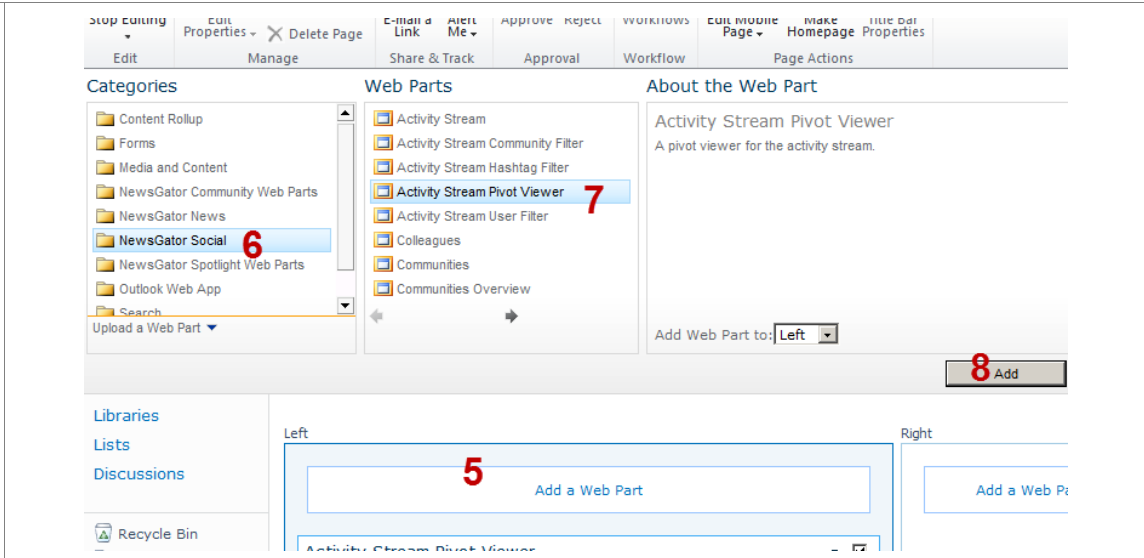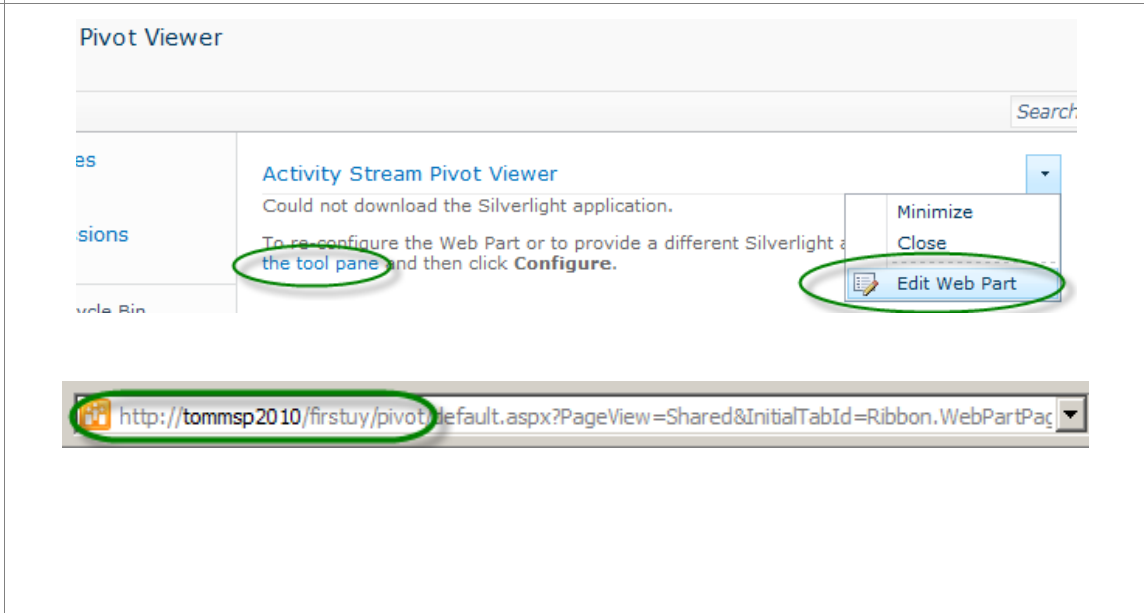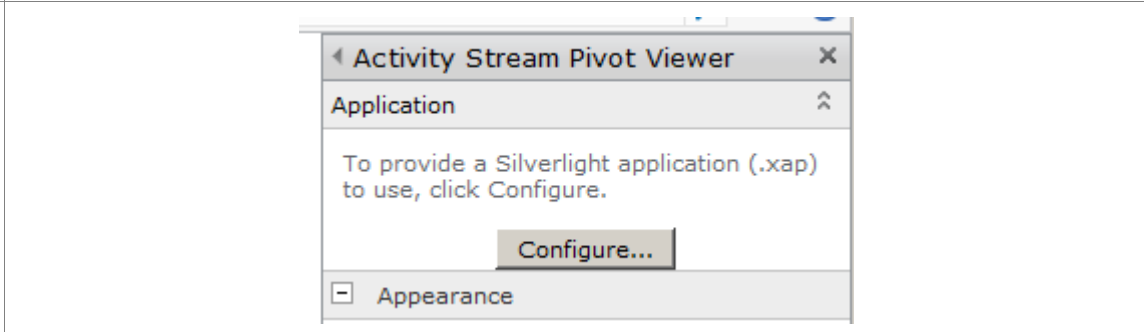
11. The dialog at right appears. Paste in front of the relative URL the path URL for your site from step 9. Then click **OK**.

12. Also click **OK** on the tool pane for the web part.

Silverlight Web Part

URL

Enter the URL of the Silverlight application package (.xap) this application should run from.

URL:

`/PVClient/NewsGator.PVClient.xap`

OK   Cancel

Silverlight Web Part

URL

Enter the URL of the Silverlight application package (.xap) this application should run from.

URL:

`http://tommsp2010/firstuy/pivot/PVClie`

OK   Cancel
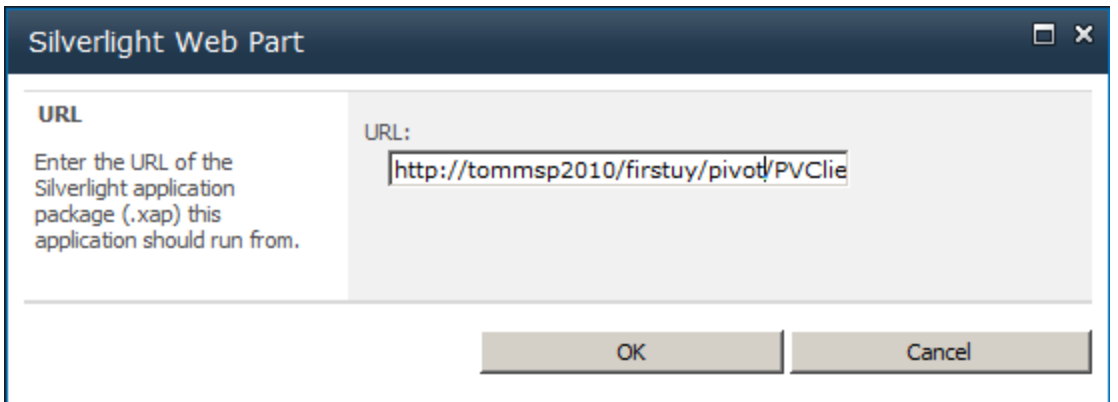
13. Now your Pivot Viewer web part should be working properly, and look like the one pictured here.

Activity Stream Pivot Viewer

Show: My Newsfeed ▼   ☐ No attention ☐ Little attention ☐ More attention ☐ Most attent Refresh

Activity Stream   Sort: Author ▼

Search...

Author
Sort: Quantity
☐ Tom McIntyre   16

Tom McIntyre Uploaded image MamaCat.jpg in @[Firstuy] Pic lib:

Tom McIntyre Uploaded image WTFwasIdrinkingCat.jpg in @ [Firstuy] Documents:

Tom McIntyre Uploaded image funny-pictures-cat-cares-about-problems.jpg in @[Firstuy] Pic lib: I am doing a test

Tom McIntyre Uploaded image funny-pictures-cats-hate-affection220.jpg in @ [Firstuy] Pic lib:

Tom McIntyre Uploaded image KittyLikesDoggie.jpg in @ [Firstuy] Documents:

Tom McIntyre Hey! You all rock!

Tom McIntyre Uploaded image YouMakeKittyScared.jpg in @ [Firstuy] Documents:

Tom McIntyre Uploaded image Grumpy Old Cat.jpg in @[Firstuy] Documents:

Web Part Configuration

☞	FIND MORE INFORMATION: Sitrion Social v5.5 User Guide

Activity Stream web part

Setting Default Filter of the Activity Stream

The personal activity stream always defaults to the "My Newsfeed" filter (except for users who have no events to see – where the filter switches to All Public Microblogs). Companies can choose which activity stream filter will displayed by default whenever a user opens a page containing the activity stream web part. Allowed choices for this default filter selection are My Newsfeed, All Public Microblogs, or Top News. This organization-wide filter choice is made by editing the web part, and changing the "Default Filter" dropdown.
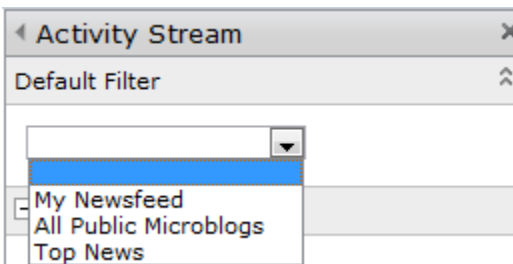
Narrow View of Activity Stream (Custom CSS Property)

The default activity stream web part is about 450 pixels wide. In some cases, customers want to render a more narrow view (e.g. to fit in a narrow web part zone). To accommodate this case and other cases where customers want to control the display of the activity stream part, a property is available on the personal activity stream web part, in the "NewsGator" section. It is called "Custom Css File Path":
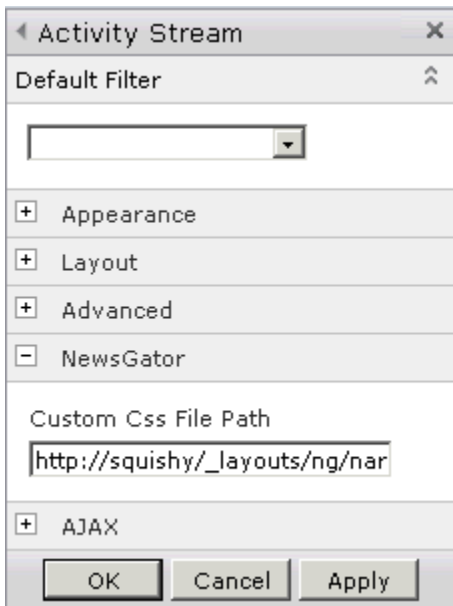
To display the activity stream web part at 300 pixels wide, provide the location of the narrow CSS which comes with Sitrion Social. This is located at:
/_layouts/ng/narrowstream.css

Community Activity Stream web part

Community Roll-up (Hierarchical Communities)

In many organizations, communities have a natural hierarchy. In those situations, it can be very useful to show the activity from communities at a lower level on the "parent" community's activity stream. The community activity stream part has two settings to enable and control this rollup behavior.

The "Rollup Child Communities" causes events from communities below (in SharePoint site structure) this community to display on the community activity stream web part. The second setting ("Exclude Child Communities that are not Followed") determines whether all sub-community activities are shown or whether only the activities from the sub-communities that the viewer is following are displayed. The diagram on the following page helps to illustrate how this works.
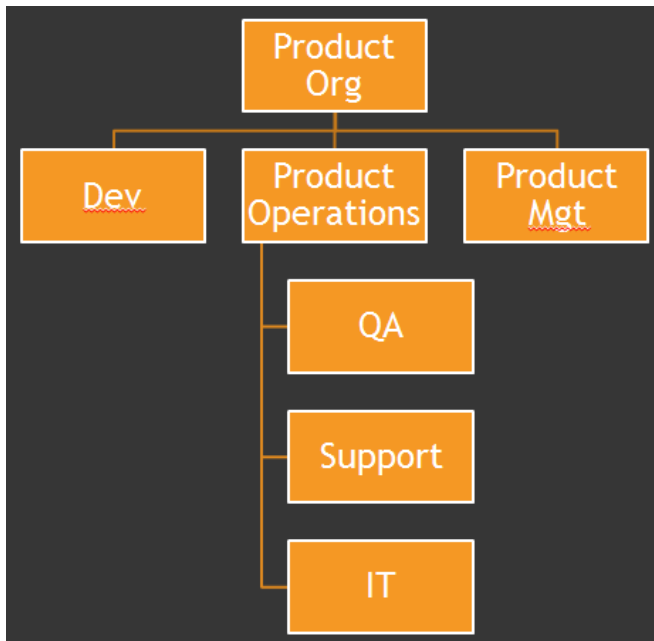
In this example case, the Product Org community is above Dev, Product Operations, and Product Mgt. Product Operations has QA, Support, and IT as child communities. If rollup is enabled on Product Org and the view is not restricted to communities that are actually followed, a visitor to Product Org will see activities from all these communities. If the view is restricted to only followed communities, then a visitor who is only following QA and Product Mgt would see QA, Product Mgt and Product Org events when visiting the Product Org community.

A couple important notes apply here.

- SharePoint security is always followed. If a user does not have access to a sub-community, he will not see activities from that community (regardless of what settings are chose on the activity stream web part).
- If a child site is restricted but has a public community below it (this would not be a recommended configuration), the events from the public community will not be rolled up unless the viewing user has access to the restricted site.
- There is no limit to the number of levels that can be rolled up.
- Rollup can be enabled on any community. Product Operations could have the rollup setting on as well in this example to rollup the events from the communities below it.
- The rollup behavior affects the view on the community site but does not change the view on the personal activity stream web part (typically placed on the My Site).

Search Integration

SharePoint Indexing of Microblogs and Questions

Sitrion Social includes its own search capability within the Activity Stream web part, and the vast majority of content (documents, blogs, wikis, discussions, etc.) are indexed directly by SharePoint. Sitrion Social provides you with the capability to have SharePoint index public microblogs and questions and the comments and answers on them. Users searching through SharePoint (or FAST) search will see these items inline with other search results. Private items are displayed (as long as the user has appropriate permissions).

Clicking on one of these search results brings the user to a special display page for the activity stream item.

This search integration also includes the community level:
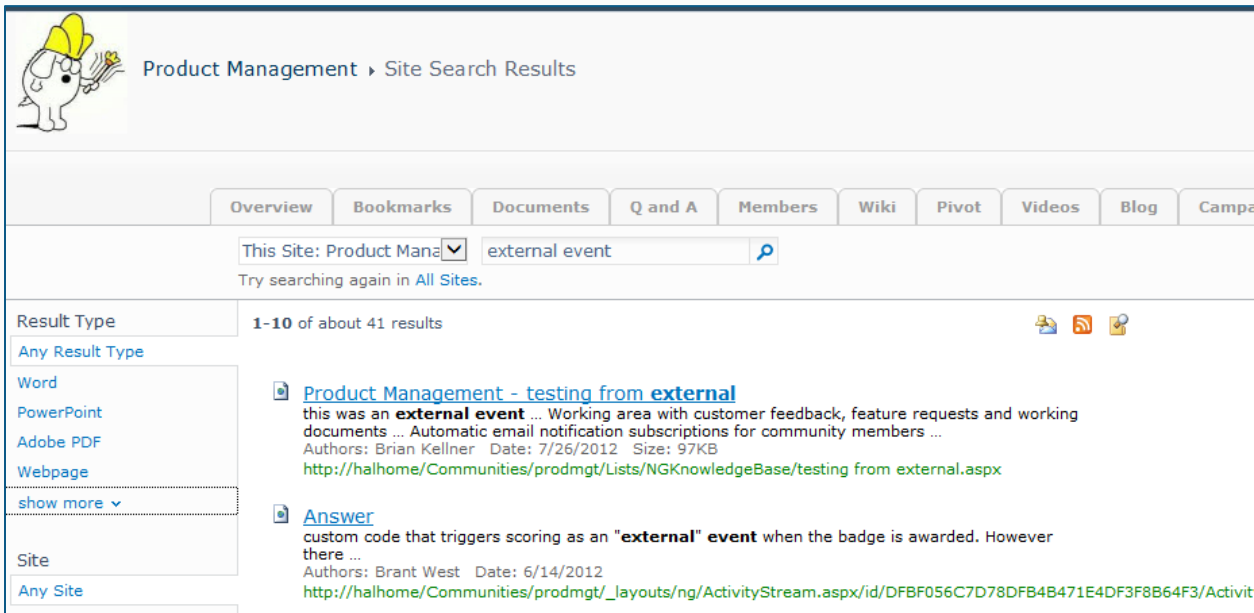
The screenshot below shows a SharePoint 2013 search center with results that include Sitrion Social posts.
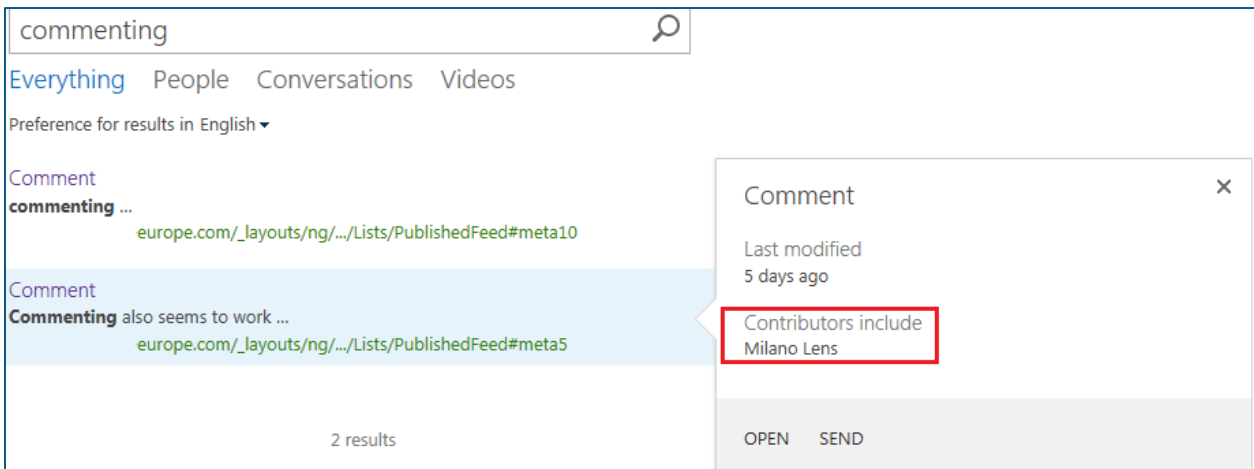
In 2013, the search refiners on the left now include "Newsfeed post" as one of the out-of-box options.

NOTE: As of the 5.0 release, there is an option to configure AD groups for indexing search in large private communities or spheres. If there are over 500 members in a private community or sphere, the search integration will automatically limit the list of users who have access to the stream items to 500. To ensure that all users in a large private community or sphere can find stream items in their SharePoint search results, you need to specify an AD group via the Security Groups for Indexing Private Items link in the Admin tab.

Configuring Search Integration

1. Ensure that a Business Data Connectivity service application is available. The BDC service will host the model that Search will crawl. (Note that this model will call through to the NewsGator Social service application.) If there is not one already, create a new BDC Service Application. Ensure that the SEARCH service identity has EXECUTE rights, and the Central Admin app pool account has ADMIN rights, on the Metadata Store of the BDC Service Application.

2. Ensure the NewsGator Social Search BDC Model for SharePoint 2010 and 2013 Farm Feature is activated.

NewsGator Social Search BDC Model for SharePoint 2010 and 2013

This feature must be activated, along with other configuration steps (see Social Sites Admin guide), to allow SharePoint Search to return public and private microblogs and questions, and their responses.

Activate

3. Next, the Search indexing service will need Execute permissions on the model, in three separate places. In the following example we set specific rights for the search identity, which in the picture is "svcdev".

Add Execute permissions for the SEARCH SERVICE APPLICATION POOL on the Social Data BDC model in the BDC Service Application (you will also need to grant an admin user "Set Permissions"). You must set this individually on the Social Sites Activity Event and Social Sites Activity Meta Event entities and on the entire Metadata Store.
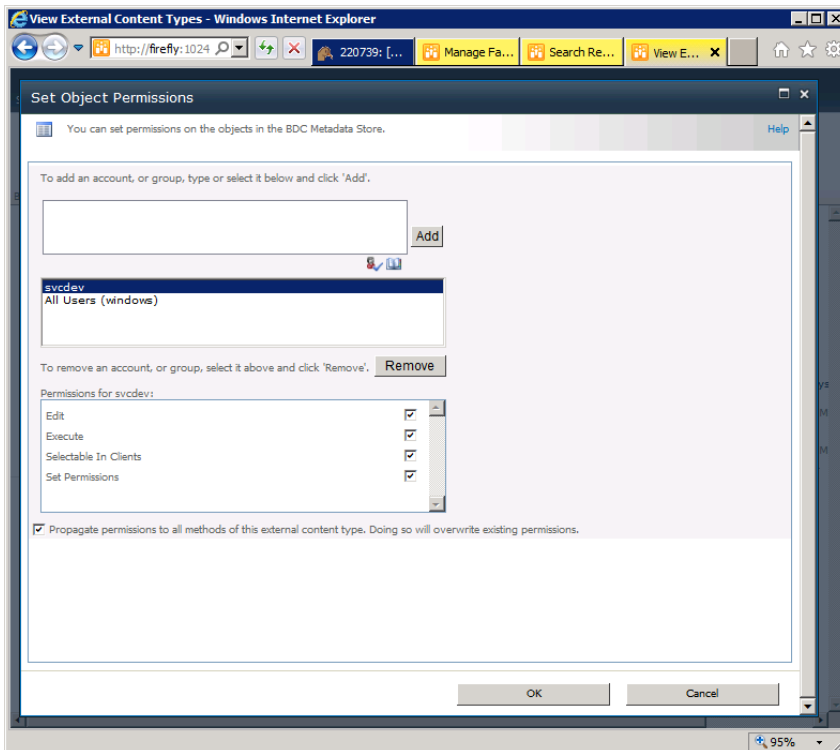
4. Create a new Content Source in Search Service Application management:
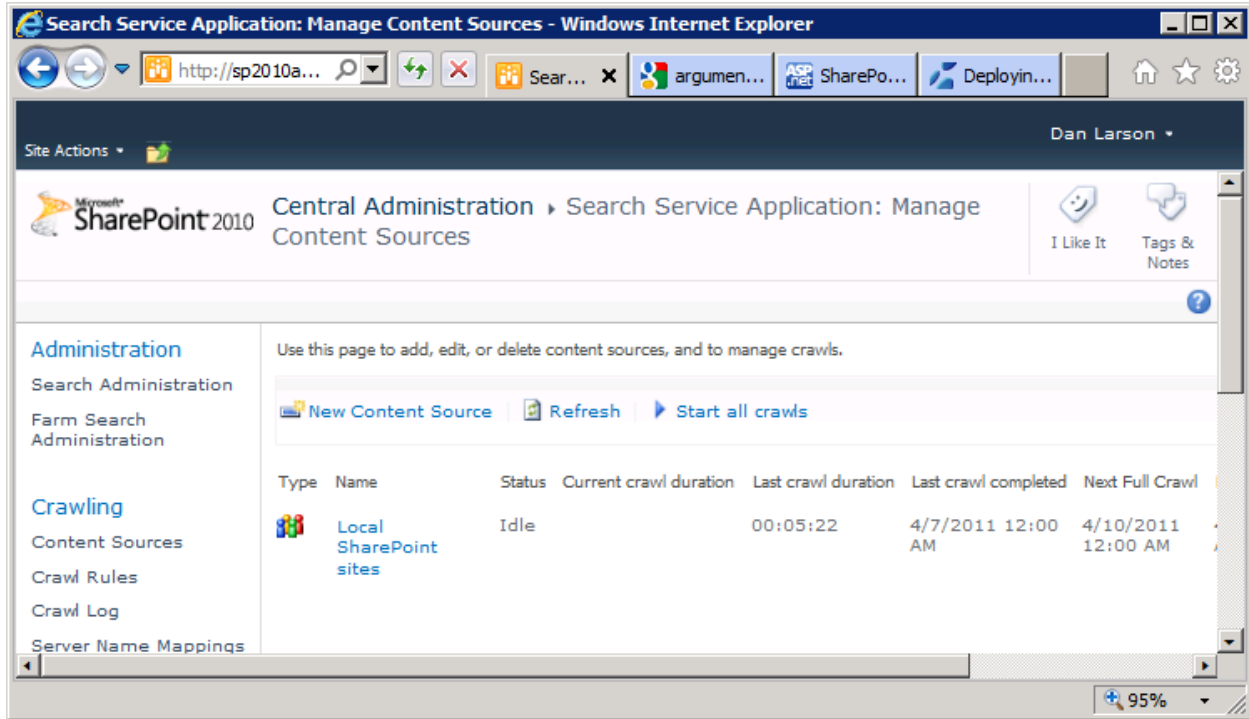
Name

Type a name to describe this content source.

Name: *

Social Data

Content Source Type

Select what type of content will be crawled.

Note: This cannot be changed after this content source is created because other settings depend on it.

Select the type of content to be crawled:

○ SharePoint Sites
○ Web Sites
○ File Shares
○ Exchange Public Folders
◉ Line of Business Data
○ Custom Repository

External Data Source

A Line of Business Data content source crawls external data sources defined in an Application Model in a Business Data Connectivity Service Application.

Select whether to crawl all external data sources in the Business Data Connectivity Service Application, or include only selected external data sources.

Crawl Rule: To create a crawl rule for an external data source, use the following pattern:
bdc3://*ExternalDataSourceName*

Select the Business Data Connectivity Service Application:

Business Data Connectivity Service ▾

○ Crawl all external data sources in this Business Data Connectivity Service Application
◉ Crawl selected external data source
☑ SocialSitesData

You will want to set the incremental crawl to run as often as you require for fresh content to be available in search. We recommend a 15 minute incremental schedule. Incremental search will only add new comments and posts and will remove soft deleted items from the search index.

A full crawl will take 2-5 minutes (or more). Ensure that the crawl succeeds. A typical failure will be Access Denied by the BDC service application. If you get this error, ensure the search service application has Execute rights on the Social Sites Activity Event and Social Sites Activity Meta Event BDC model entities.

To support SharePoint 2013 search refiners, please follow these additional steps:

1. After setting up the Search Crawl source, do a full crawl
2. In the Search Schema, map the following Crawled Properties:
   - SocialSitesActivityEvent.ContentTypeId > ContentTypeId
   - SocialSitesActivityEvent.Created > Created
   - SocialSitesActivityEvent.LikesCount > LikesCount
   - SocialSitesActivityEvent.PostAuthor > PostAuthor
   - SocialSitesActivityEvent.ReplyCount > ReplyCount
   - SocialSitesActivityMetaEvent.ContentTypeId > ContentTypeId
   - SocialSitesActivityMetaEvent.Created > Created
   - SocialSitesActivityMetaEvent.LikesCount > LikesCount
   - SocialSitesActivityMetaEvent.PostAuthor > PostAuthor
   - SocialSitesActivityMetaEvent.ReplyCount > ReplyCount
3. Do another Full Crawl

Global Functionality

Permissions for global capabilities

Many global capabilities are accessible only to those who have been given the specific permission to perform them in Central Administration. These are accessed as follows:

1. Open SharePoint Central Administration.
2. Under the **Application Management** area, click the **Manage Service Applications** link.
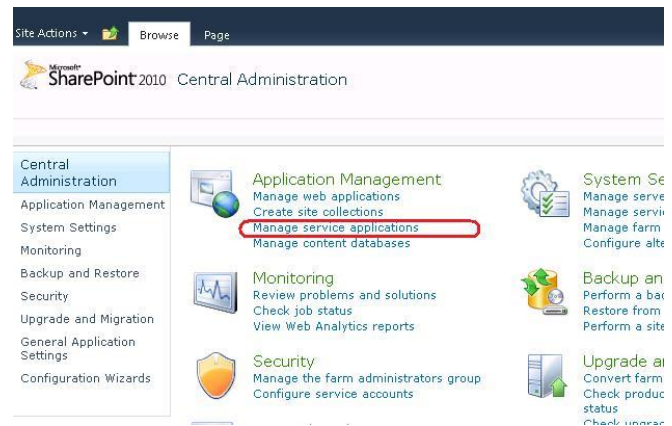
3. From the list that appears, select the service application of type **NewsGator Social Platform Services** (but do not click on the name itself, which navigates away to a different page).
4. In the menu area, click **Administrators**.

   (As an alternative to the above steps, follow the instructions in the **Manage Administrator Permissions Page** section above. This alternative is, in fact, necessary when your organization uses claims backed by ADFS.)
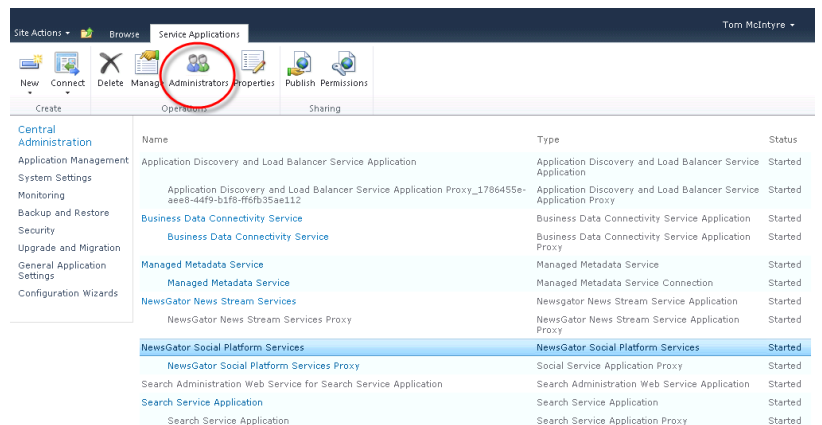
A dialog window titled **Administrators for NewsGator Social Platform Services** displays.

5. Type the name of the account that you want to grant permission to, with domain name, in the box at the top of the dialog.
6. Click the "Check user" icon below the box to validate the username you typed. When you have it correct, click the **Add** button.
7. Make sure this account is now selected in the middle box.
8. In the **Permissions …** box at the bottom, check the individual permissions you wish to grant to the user (covered separately elsewhere throughout this section), or check **Full Control** to grant all permissions.
9. Click **OK** to close the dialog.
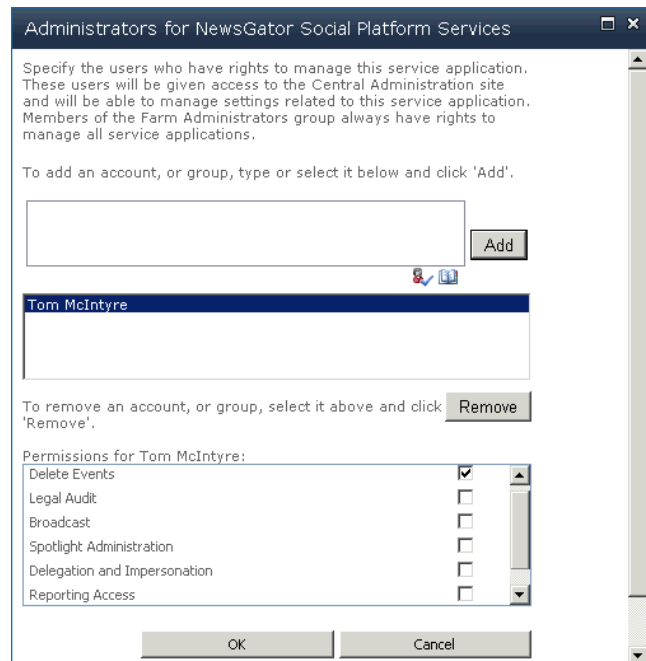
For a description of the **Delete Events** permission, see **Ability to delete any post** below.

For a description of the **Legal Audit** permission, see **Legal Audit Search** below.

For a description of the **Broadcast** permission, see **Broadcasting** below.

For a description of the **Spotlight Administration** permission, see **Spotlight Administration** below.

For a description of the **Reporting Access** permission, see **Global Activity Reporting** below.

For a description of the **Sphere Administration** permission, see **Administration of Sphere Ownership** below.

For a description of the **Manage Audiences** permission, see **Setting Public Community Followers Using SharePoint Audiences** above, under **Configuring a Community**.

The **Manage Dashboards** permission allows the admin to define a set of Lookout tiles to assign to the members of a SharePoint audience. See the **Assigning Lookout Tiles to Groups of Users using Tile Sets** section above for more on this capability.

The **Delegation and Impersonation** permission should only be granted to accounts that serve as application pool identities on consumer farms, when running Sitrion Social in a multi-farm environment. This permission must be granted to those accounts for Sitrion Social to operate properly in a multi-farm environment, and should be done as part of installation or upgrade procedures, as described in the **Sitrion Social v5.5 Planning and Installation Guide**.

Ability to delete any post

You can grant certain users the right to delete posts made by any user. This right can be used to ensure offensive or otherwise undesired posts can be removed by administrators.

To grant this right, follow the procedures above in the **Permissions for global capabilities** section, and grant the **Delete Events** right on the Administrators for NewsGator Social Platform Services page.

Sitrion Social Administration Page

The Sitrion Social administration page provides links to any of the following five global administrative pages which you have permission to access:

- Spotlight Administration (see **Spotlight Administration** below)
- Legal Audit Search (see **Legal Audit Search** below)
- Activity Stream Broadcast (see **Broadcasting** below)
- Global Reports (see **Global Activity Reporting** below)
- New User Statistics Report (see **User Profile Completion Report** below)

If you have the permission to see any one of these four admin pages, you will see the "Social Sites Administration" option in your personal menu in SharePoint:
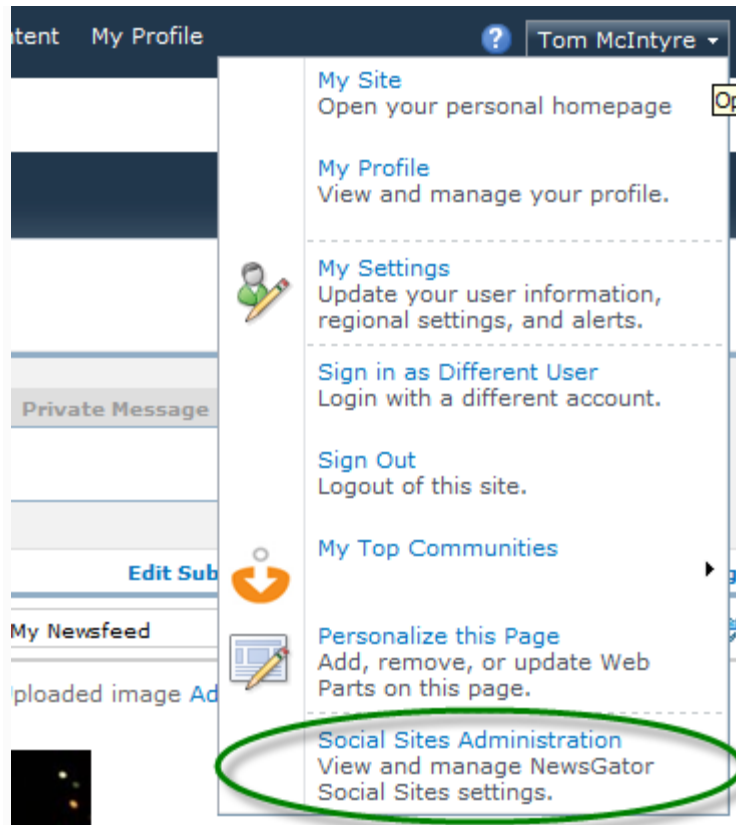
Clicking this option brings you to the Sitrion Social Administration page:
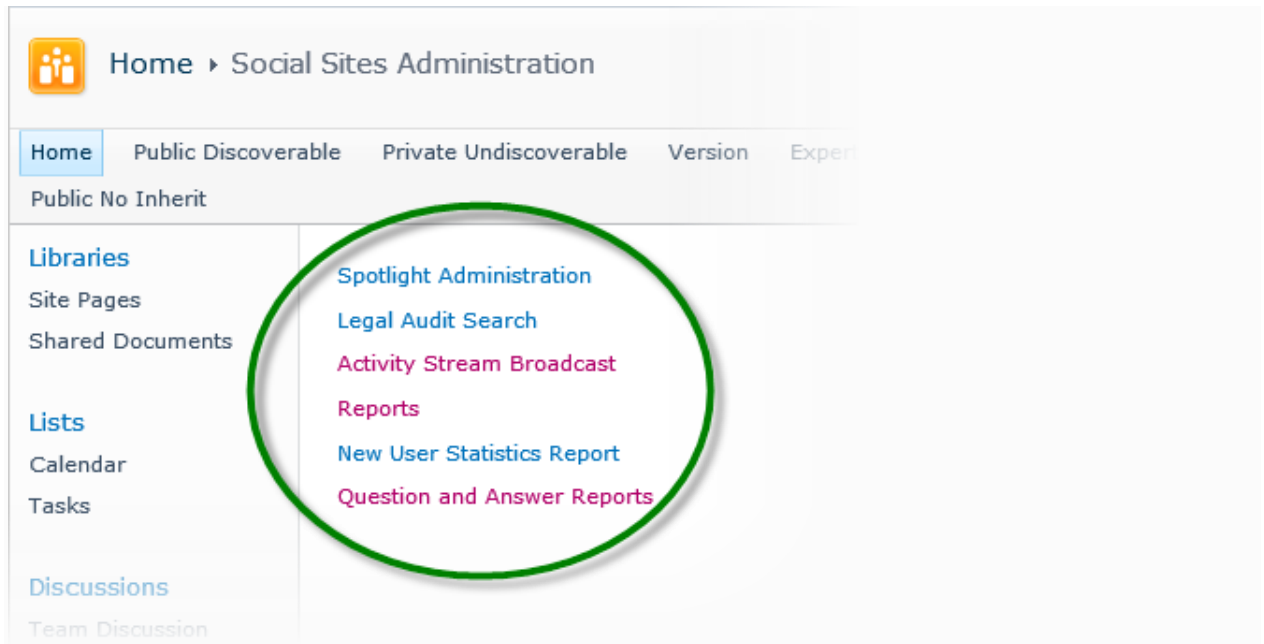
Click any of the links listed to get to the corresponding administrative page.

Spotlight Administration

The Spotlight Administration page is only available if the optional Spotlight module has been installed with your version of Sitrion Social. Spotlight adds expertise identification and recognition features to Sitrion Social. For instructions on administering Spotlight, see the Spotlight Module section of this guide.

Legal Audit Search

The Legal Audit feature has been made generally available in the product as of the 2.1 release. The goal of this feature is to allow extended retention of actions in the activity stream performed by specific people. When a person is placed on "legal hold" status, all of their events and any events on which they commented are retained even if they are older than the normal retention duration. Because this feature was designed for integration with other legal control systems, setting users on "hold" status is done via API (full details for the API are available on request).

Legal Audit also includes the capability to search the full stream. To access this capability, click the "Legal Audit Search" link on the Sitrion Social Administration page (see **Sitrion Social Administration page**, above). This brings up the following view:

Account Name:		
Preferred Name:		
First Name:		
Last Name:		
Search Term:	pizza	
From Date/Time:	9/7/2011	4 PM 02
To Date/Time:	10/8/2011	4 PM 02
Maximum amount of events to return:		

Search

Results:

Account Name	Preferred Name	Original View	Text	UTC Date	Activity Type	Deleted
CORP\briank	Brian Kellner	View	@[BK Folks] woo hoo LUNCH IS HERE!!!! Come get some pizza in the darts area	10/7/2011 5:46:56 PM	Microblogging	False
CORP\danl	Dan Larson	View	Mmmm.... pizza salad!!!!	10/7/2011 4:48:28 PM	Picture	False
CORP\briank	Brian Kellner	View	@[BK Folks] LUNCH NOTICE: Pizza and Salad coming for lunch today. Sorry for the short notice. Thanks for the great work! LUNCH = LAUNCH!!!!!!! Thx!	10/7/2011 4:45:02	Microblogging	False

The search options are fairly self-explanatory. Using multiple criteria finds the items that match all criteria. Clicking the View link for a particular item shows the full view of that item including the comments on it, as in this example:

@briank
Brian Kellner

@[BK Folks] woo hoo

LUNCH IS HERE!!!!

Come get some pizza in the darts area

- http://hal/_layouts/ng/ActivityStream.aspx/id/0862 4oF8CEoCDo. Stream Post

10/7/2011

@jmalone (Joe Malone): Thanks for delish lunch!!!
10/7/2011

Broadcasting

The broadcast capability is available only to those with the **Broadcast** permission in the NewsGator Social Platform service (see **Permissions for global capabilities** section above). It is used for sending messages to all users. To access it, click the "Activity Feed Broadcast" link on the Sitrion Social Administration page (see **Sitrion Social Administration page**, above). This brings up the following view:

A message entered here will appear at the top of the Activity Stream for all users and stays there until the designated pinning duration passes.

Users can interact with a broadcast as with any other stream item, including liking, commenting, and finding it via search (note that this represents a change for users that have used a version of Sitrion Social prior to version 3.0, when broadcast messages were not regular stream items, and did not contain any options for the viewer.) Also, with the addition of the "mute" option (found under the "chevron" control in the upper right corner of the stream item), users can now choose to hide a broadcast message.

Global Activity Reporting

The ability to view reports on global activity across your SharePoint deployment is available only to those with the **Reporting Access** permission in the NewsGator Social Platform service (see **Permissions for global capabilities** section above). Click the "Reports" link on the Sitrion Social Administration page (see **Sitrion Social Administration page**, above) to see global activity reports (Activity History, Top Users Activity Report, and Activity By Type). These parts work exactly like the reporting parts on display in the Admin tab of a community except they cover all activity in the system. Note that placing the reporting parts in any place except a community will cause them to show the global data view.

Also available on this page is the **Export Report** web part. This web part allows exporting the reporting data into csv format which can be readily used in Microsoft Excel for additional reporting. In this tabular form, reporting data can be analyzed in ways the other reporting web parts don't support. A community-scoped version of this web part appears on the Admin tab of communities.

export report

Choose a date range and export an activity report as CSV file.

From: 12/12/2012   to: 01/31/2013

export

Clicking in the "from" or "to" boxes brings up a date selector control. In the From box put the beginning date, and in the To box the ending date, for the activities you'd like in the report.

export report

Choose a date range and export an activity report as CSV file.

From: 12/12/2012   to: 01/31/2013

exp

Dec ▼ 2012							january 2013							february 2013						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
						1			1	2	3	4	5						1	2
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28		
30	31																			

After selecting the data range and clicking "export", your browser will prompt you to allow opening or saving a file. The data is provided in four main columns when viewed from a community. They show any communities connected with the item (delineated by semi-colons), the date, the user and the type of action.

A Community	B Date	C User	D Activity Type
Business Development Reps (BDR); Sales and Selling Tools	1/25/2013	Annemar	Comment
Analyst Research; Enterprise Competition; Business Developme	1/25/2013	Melissa R	Like

Note: the community-scoped version of this web part creates reports like this global one, but without the Community column.

Also available on this page is a globally-scoped version of the **User Detail Report**. This shows how active a user has been, and what types of activities they've been engaging in.

After entering a search string and pressing the magnifying glass button, matching users are listed.

Clicking on a specific user opens a display panel that shows the date of last activity as well as overall counts of actions in the last 30, 60 and 90 days. This can be helpful for assessing users who have greatly increased or decreased participation. It also provides a breakdown of their last 90 days of activity by type.

User Profile Completion Report

Sitrion Social includes a report to show the level of completeness of user profiles for the steps included in the new user / getting started process. The ability to view this User Profile Completion Report is available only to those with the **Reporting Access** permission in the NewsGator Social Platform service (see **Permissions for global capabilities** section above). Click the "New User Statistics Report" link on the Sitrion Social Administration page (see **Sitrion Social Administration page**, above) to see this report.

This report is run checking which users have completed each stage of the wizard to avoid putting extra strain on the SharePoint user profile service. Users can skip steps in the Getting Started web part and will show in this report as having progressed through that stage. The process for new users in the Lookout page requires users to actually enter data before they can proceed through the steps.

The report will look like the example below:

Statistics based on steps enabled in the getting started web part.

	# Complete
Add Profile Picture	162
About Me	131
Ask Me About	121
Interests	102
Skills	93
Past Projects	51
Schools	57
Time Zone	75

The rows show the steps in the user profile wizard. The "# Complete" column indicates the number of users who have passed through this step in the wizard. These steps can be completed from either the Getting Started web part from prior Sitrion Social or the tile in the Lookout page. The Getting Started web part allows skipping steps which will still be tracked as completed in this report. The wizard in the Lookout page validates that the user has entered data on all steps except the profile picture and time zone.

Questions and Answers Report

This report shows the outcomes for questions asked in the activity stream each month.

Year	Month	New Questions	Average Time to First Answer (minutes) [1]	Average Time to First Good Answer (minutes) [2]	Unanswered	Answered	With a Good Answer	Answered in 24 Hours	Answered in 48 Hours	Answered in 96 Hours	Answered in 96+ Hours	Good Answer in 24 Hours	Good Answer in 48 Hours	Good Answer in 96 Hours	Good Answer in 96+ Hours
2011	April	1	8	21	0.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %	100.00 %
2011	May	16	469	579	6.25 %	93.75 %	43.75 %	87.50 %	87.50 %	93.75 %	93.75 %	37.50 %	37.50 %	43.75 %	43.75 %
2011	June	127	131	244	14.17 %	85.83 %	25.20 %	85.04 %	85.04 %	85.83 %	85.83 %	23.62 %	24.41 %	25.20 %	25.20 %
2011	July	112	375	28	10.71 %	89.29 %	24.11 %	86.61 %	86.61 %	87.50 %	89.29 %	24.11 %	24.11 %	24.11 %	24.11 %
2011	August	134	439	208	16.42 %	83.58 %	21.64 %	79.85 %	79.85 %	81.34 %	83.58 %	20.90 %	20.90 %	21.64 %	21.64 %
2011	September	106	160	617	21.70 %	78.30 %	25.47 %	77.36 %	77.36 %	77.36 %	78.30 %	23.58 %	24.53 %	24.53 %	25.47 %
2011	October	153	351	3452	21.57 %	78.43 %	20.92 %	73.20 %	76.47 %	77.78 %	78.43 %	17.65 %	18.95 %	19.61 %	20.92 %
2011	November	129	1021	2544	24.03 %	75.97 %	29.46 %	71.32 %	73.64 %	75.19 %	75.97 %	25.58 %	27.13 %	27.91 %	29.46 %
2011	December	144	2230	220	15.97 %	84.03 %	28.47 %	81.25 %	82.64 %	83.33 %	84.03 %	26.39 %	27.78 %	28.47 %	28.47 %
2012	January	135	1257	141	18.52 %	81.48 %	22.96 %	76.30 %	77.04 %	77.78 %	81.48 %	22.22 %	22.96 %	22.96 %	22.96 %
2012	February	153	235	223	32.68 %	67.32 %	19.61 %	65.36 %	65.36 %	66.67 %	67.32 %	18.95 %	19.61 %	19.61 %	19.61 %
2012	March	139	339	675	15.11 %	84.89 %	29.50 %	79.14 %	80.58 %	84.17 %	84.89 %	26.62 %	27.34 %	28.06 %	29.50 %
2012	April	125	247	140	21.60 %	78.40 %	11.20 %	76.00 %	76.00 %	77.60 %	78.40 %	11.20 %	11.20 %	11.20 %	11.20 %
2012	May	138	315	260	18.12 %	81.88 %	20.29 %	76.09 %	79.71 %	79.71 %	81.88 %	18.84 %	20.29 %	20.29 %	20.29 %
2012	June	128	511	584	12.50 %	87.50 %	34.38 %	84.38 %	85.16 %	85.94 %	87.50 %	32.03 %	32.81 %	32.81 %	34.38 %
2012	July	94	2668	332	11.70 %	88.30 %	28.72 %	82.98 %	85.11 %	86.17 %	88.30 %	26.60 %	28.72 %	28.72 %	28.72 %
2012	August	129	518	1144	14.73 %	85.27 %	29.46 %	79.84 %	80.62 %	82.95 %	85.27 %	24.81 %	27.91 %	28.68 %	29.46 %
2012	September	141	377	632	12.06 %	87.94 %	27.66 %	84.40 %	85.11 %	85.82 %	87.94 %	24.82 %	24.82 %	26.24 %	27.66 %
2012	October	130	384	713	19.23 %	80.77 %	24.62 %	76.92 %	77.69 %	80.00 %	80.77 %	23.08 %	23.85 %	23.85 %	24.62 %
2012	November	125	844	351	13.60 %	86.40 %	22.40 %	76.80 %	78.40 %	82.40 %	86.40 %	21.60 %	21.60 %	22.40 %	22.40 %
2012	December	111	183	409	18.02 %	81.98 %	21.62 %	80.18 %	81.08 %	81.08 %	81.98 %	19.82 %	21.62 %	21.62 %	21.62 %
2013	January	237	936	1869	8.86 %	91.14 %	26.58 %	86.08 %	87.76 %	89.87 %	91.14 %	22.78 %	23.21 %	23.63 %	26.58 %
2013	February	214	270	389	8.88 %	91.12 %	25.23 %	87.85 %	89.72 %	90.19 %	91.12 %	23.83 %	24.77 %	25.23 %	25.23 %
2013	March	237	326	984	8.86 %	91.14 %	25.32 %	88.19 %	88.61 %	89.87 %	91.14 %	22.36 %	22.78 %	23.63 %	25.32 %
2013	April	282	330	1325	13.48 %	86.52 %	27.30 %	81.21 %	82.62 %	85.46 %	86.52 %	24.11 %	24.82 %	26.24 %	27.30 %
2013	May	252	345	926	13.89 %	86.11 %	26.19 %	80.16 %	83.33 %	85.32 %	86.11 %	24.60 %	25.00 %	25.40 %	26.19 %

Notes:
[1] Average only includes questions that have been answered. Since questions may get answered after the current month, answer time may span months.
[2] Average only includes questions that have good answers. Since questions may get marked as good answers after the current month, time may span months.

This is a report trended by calendar-month showing:

- o New questions

- Average time to first answer
- Average time to first good answer
- Percentage of questions answered
- Percentage with a good answer
- Percentage of questions answered within 24, 48, 96 hours and longer than 96 hours
- Percentage of questions with a good answer within 24, 48, 96 hours and longer than 96 hours

The goal of the report is to show the value and performance of questions and answers in the environment, by making apparent how the overall question and answer functionality is working as well as how questions progressed from unanswered to answered and then to having at least one answer marked as a good answer.

As the footnotes explain, each row is showing new questions asked in that month. If a question goes unanswered for a long period and then finally gets answered after several months, it will affect the average answer time for that month.

Administration of Sphere Ownership

Spheres are controlled by the owner (the person who creates the Sphere). In some cases, the owner may want to transfer ownership of the Sphere to someone else. This ability is available only to those sphere owners with the **Sphere Administration** permission in the NewsGator Social Platform service (see **Permissions for global capabilities** section above).

Users who have this ability get an additional "Administer" tab in the Spheres management UI:
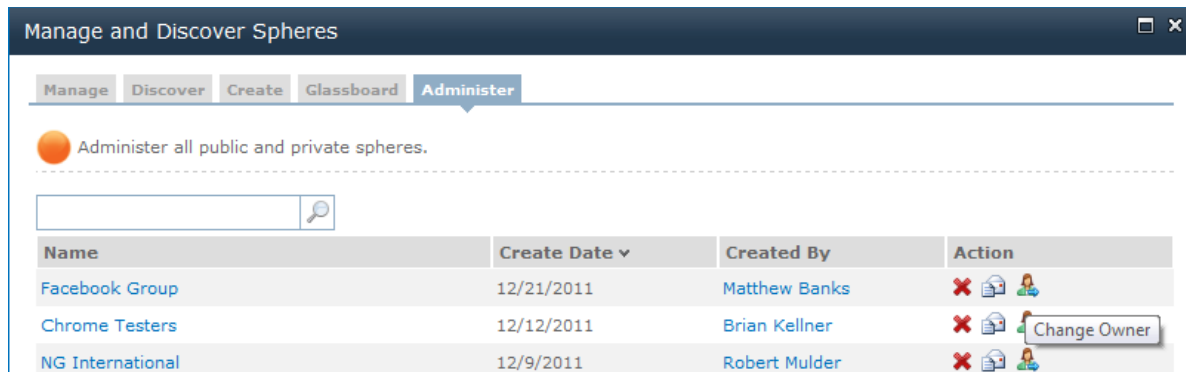
On the "Administer" tab, you'll see the spheres you own. The far right option is to Change Owner. When you click this icon, it brings up the people picker control to pick the new owner.

When you click "Save", the ownership is transferred.
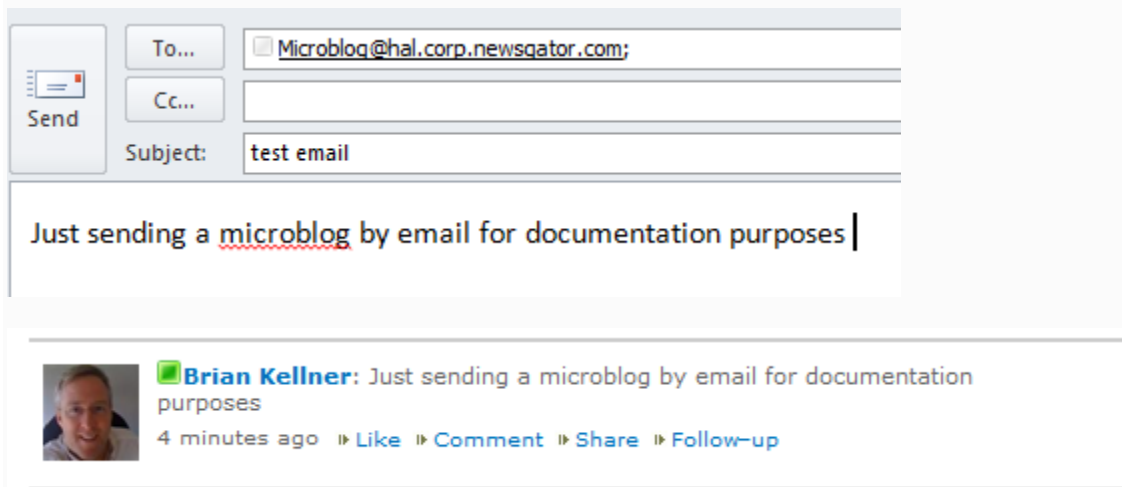
Global Email Addresses for microblogging and asking questions

Users may want to initiate microblogs or questions by sending emails. There is a global address for emailing a microblog and a global address for emailing a question. To enable, add an email handler as described in **Email Handler Section**, above. Then:

- … to post a new microblog to your activity stream, send to Microblog@FQDN_of_your_server
- … to post a new question to your activity stream, send to Question@FQDN_of_your_server
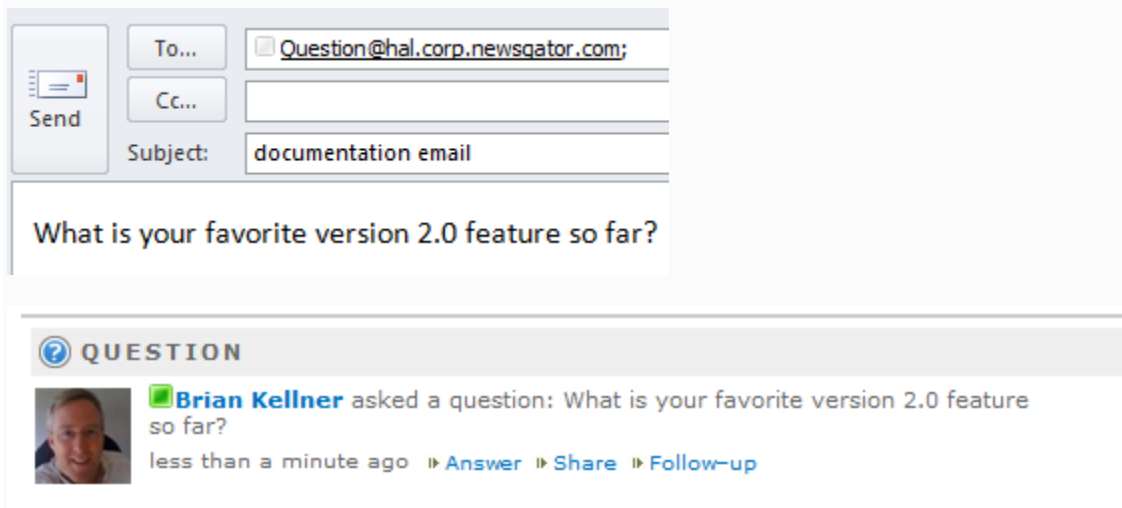
where "FQDN_of_your_server" is the fully-qualified domain name of the SharePoint server where you added your email handler.

Here is a microblog example.

And a question example is below.

Handling Attachments on Inbound Emails

Sitrion Social accepts the attachments on emails that are sent to its endpoints. Sitrion Social will store the attachments in SharePoint and link them in the relevant stream item (or comment). The example email below is being sent to a microblog address for a community:
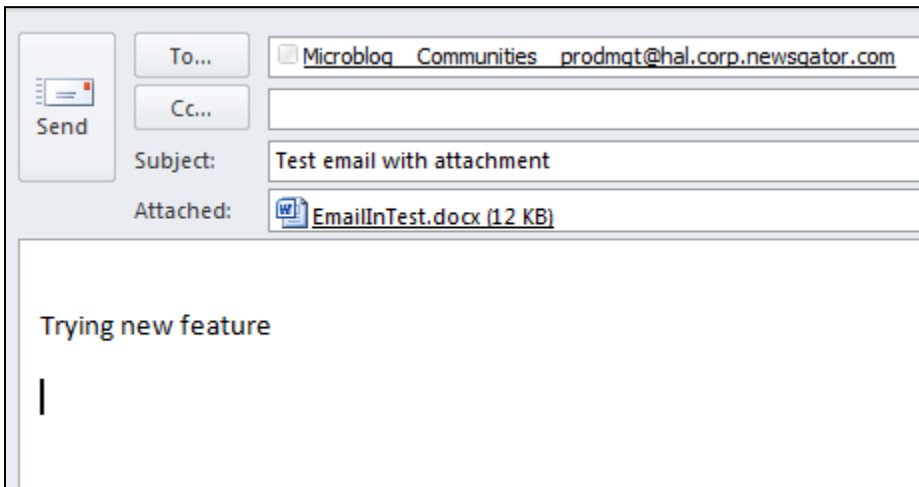
The result is an activity stream item that looks like this:
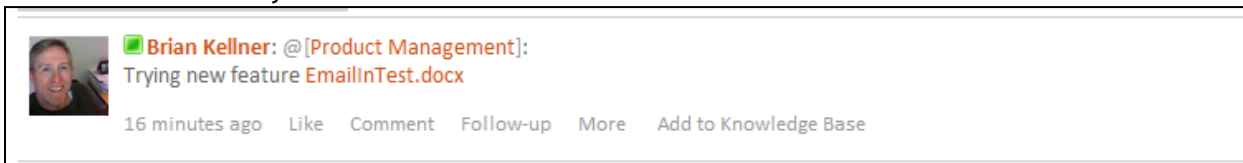
Images get special handling. If an email is sent with a single image as an attachment, that image will be displayed in the post in the stream.
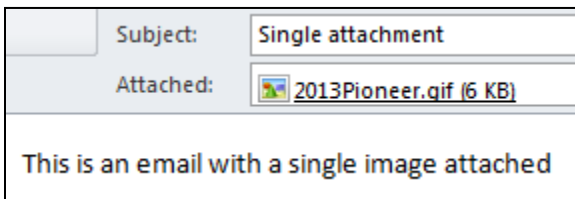
Shows up like this:
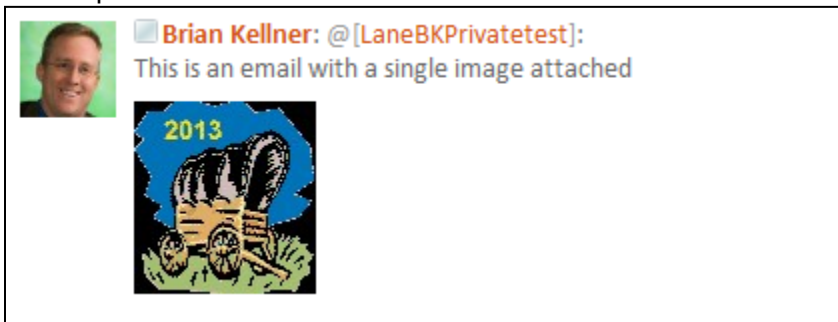
Emails with multiple image attachments will display all attachments as links (in the same way that documents are handled).

Embedded images are displayed in the stream in the same position they appear in the email.
Here's the email:
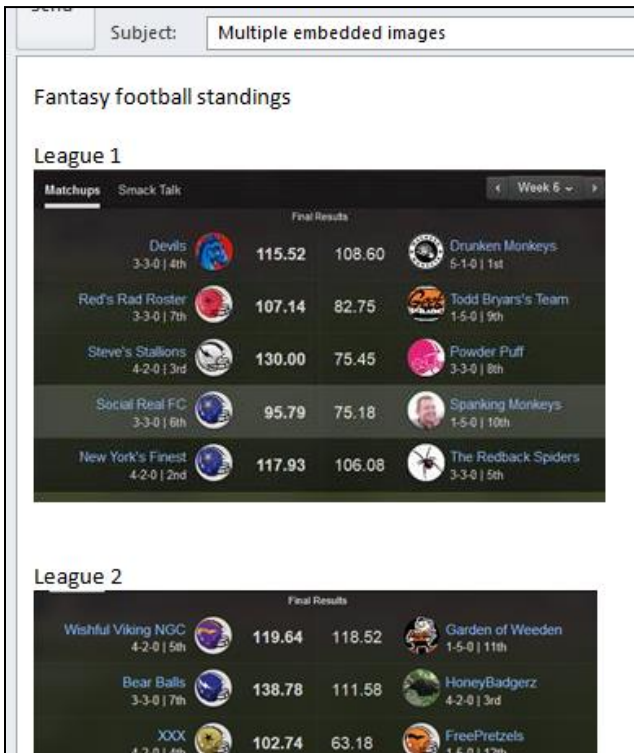
Here's the stream entry:
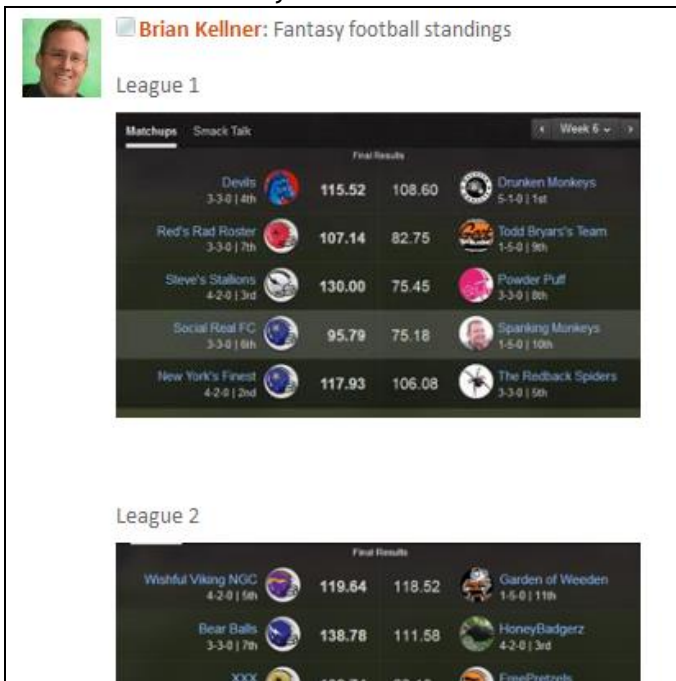
When users have signatures that contain embedded images, they are included in the emails to the activity stream:
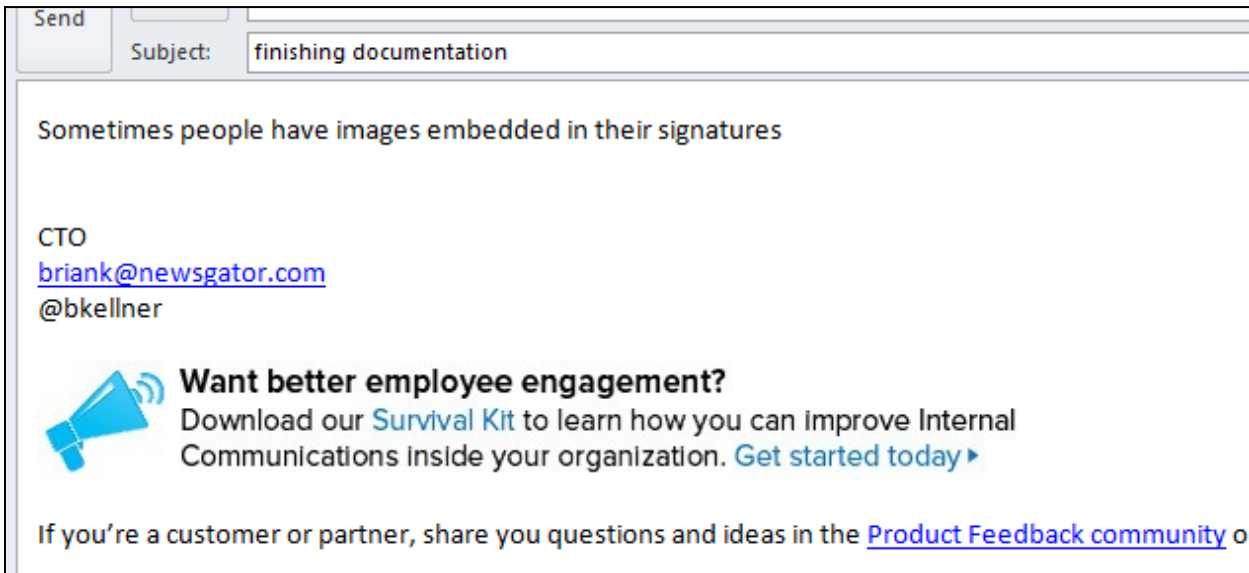
They will look like this in the stream:
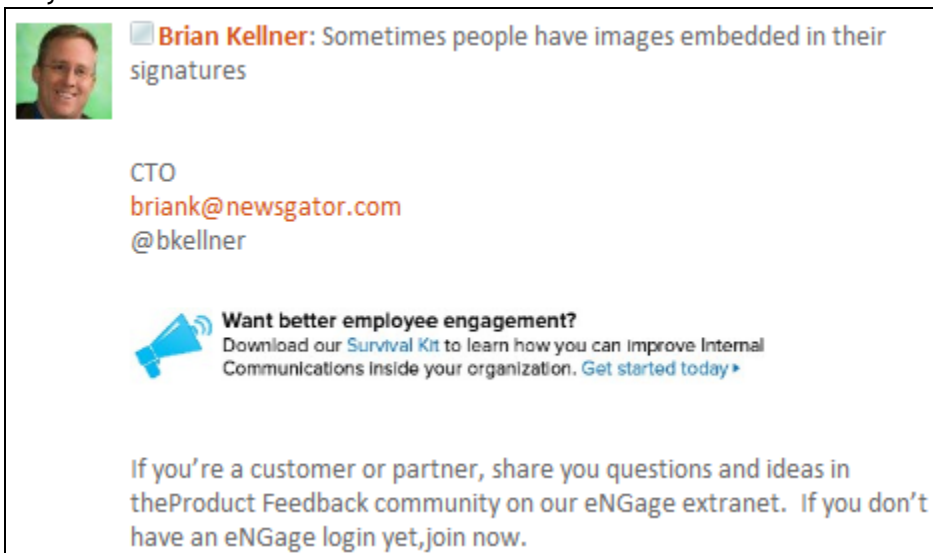
Most email systems have the option to disable including signatures on internal emails. Alternatively, users can learn to delete their signature before sending the email.

NOTE: 1) Incoming email to your SharePoint server will be limited in size by the SMTP settings. 2) There are some changes in the XSLT for digest and notification emails. If you have customized the existing XSLTs and want to take advantage of new capabilities, you will need to re-implement your customizations on the new XSLTs.

Handling Bullet Points on Inbound Emails

Here is an example inbound email with bullet points:
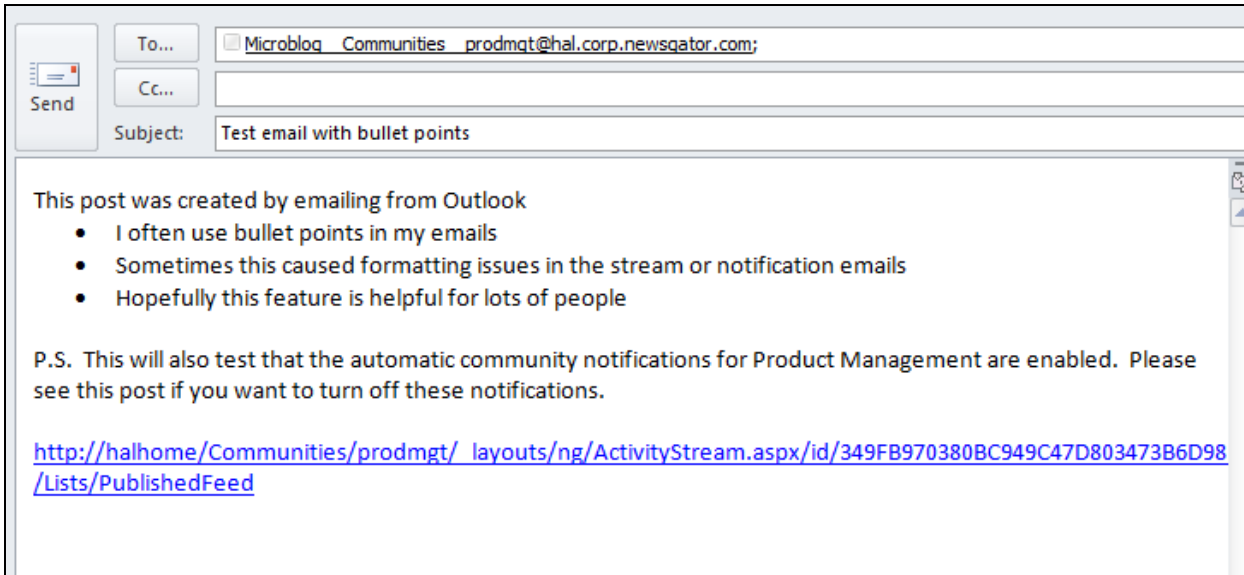
This renders in the activity stream like the image below.
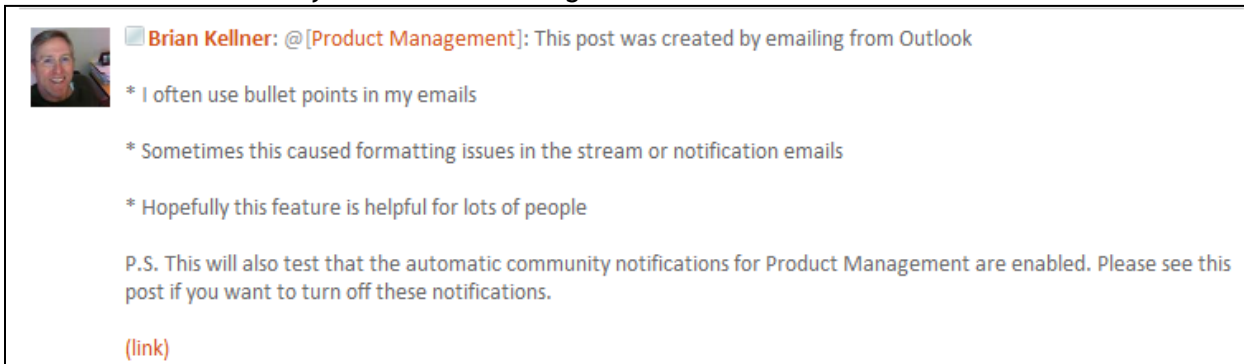
Event Generation Outside Communities

Sitrion Social provides the NewsGator Social NewsFeed Integration feature to allow site admins to enable lists in that site to send events to the Activity Stream. This feature is useful if you want to raise visibility to certain lists which are not logically part of any sort of community. When a user takes an action in a list where this feature is enabled, the event is sent to others who have chosen to follow that user as a colleague.

Sitrion Social Jobs

Below find descriptions of Sitrion Social jobs and advice on their usage.

NewsGator Active User Count License Email Job

Module	Core
First release	v2.0
Function	Sends an email report of the number of Sitrion Social users who have viewed their activity stream in the last 30 days, and also in the last 60, 90, 180, and 365 days. Sent to users listed in the License Configuration section of the NewsGator Social Platform settings.
Consequences of stopping	The email report is no longer sent
Data per cycle	All
Default interval	Monthly (at 6 am on the 1st)
Minimum Recommended interval	Daily
Maximum Recommended interval	Monthly

NewsGator Activity Notification Job

Module	Core
First release	v4.0
Function	Avoids browser delays experienced by users when liking, commenting on, or answering a post that has already had a very large number of people respond to it (usually by liking). This is done by working out which other users should or should not get notified of your action, and sending those notifications, in this background job, instead of immediately doing so.
Consequences of stopping	Information on new likes, comments, and answers will queue up, not getting converted into notifications, and therefore nobody will receive notifications of these types of actions. If you have this job turned off for some time, then turn it back on, users will get their entire backlog of overdue notifications at once. If you have turned this job off and you don't want to flood the system with all the accumulated like, comment, and answer notifications when the job is turned back on, and are willing to abandon these notifications, please contact NewsGator for guidance on how to clear out the queue for this.
Data per cycle	All queued notifications
Default interval	1 minute
Minimum Recommended interval	1 minute
Maximum Recommended interval	3 minutes

Usage notes	The time interval at which you run this job should not exceed the delay you are willing to experience between the time a like, comment, or answer event occurs and the time a notification is sent informing interested users of the event.

NewsGator Activity Publisher Job (1 of 2)

Module	Core
First release	v2.1
Function	Publishes social events from an asynchronous event queue to the Activity Feed. This job is intended to run continuously. It will poll the activity event queue every 5 seconds and write aggregated events to the Activity Feed. Job 1 of 2.
Consequences of stopping	No activity events from the activity queue get published to the activity stream. Microblogs and certain events may get published.
Data per cycle	All (all new events since the last time one of the Publisher jobs polled the activity event queue).
Default interval	1 minute
Minimum Recommended interval	1 minute
Maximum Recommended interval	1 minute
Usage notes	The job runs for one minute, then stops. The reason for having two Publisher jobs is so that there is always at least one up and running, as one remains running as the other restarts. Setting this to a longer interval will result in activity not getting posted to the stream for most of that interval - it will get posted the next time one of the Publisher jobs runs.

NewsGator Activity Publisher Job (2 of 2)

Module	Core
First release	v2.1
Function	Publishes social events from an asynchronous event queue to the Activity Feed. This job is intended to run continuously. It will poll the activity event queue every 5 seconds and write aggregated events to the Activity Feed. Job 2 of 2.
Consequences of stopping	If only job 2 of 2 is stopped, events based on the activity queue will get published slower and users may experience lag.
Data per cycle	All (all new events since the last time one of the Publisher jobs polled the activity event queue).

Default interval	1 minute
Minimum Recommended interval	1 minute
Maximum Recommended interval	1 minute
Usage notes	See above.

NewsGator Audience Processor Job

Module	Core
First release	v2.6
Function	Updates the memberships of communities and spheres that use audiences to define their memberships. When it finds any changes in those audiences, it makes the same changes in the NewsGator database. As users are added to or removed from audiences, the communities and spheres that base their memberships on them will not update with those changes until the NewsGator Community Processor job runs.
Consequences of stopping	As users are added to or removed from audiences, the communities and spheres that base their memberships on them will not update with the same changes.
Data per cycle	All audiences are processed each time the job runs.
Default interval	Daily (between 2 am and 12 am)
Minimum Recommended interval	Hourly
Maximum Recommended interval	Daily

NewsGator Community Processor Job

Module	Core
First release	v2.0
Function	Updates the NG Social database to reflect changes made in community sites, including: unfollowing users who have lost access rights to a private community; making followers of those added to the Members group of a community; cleanup up data from communities whose site has been deleted. Processes communities on the local farm only.
Consequences of stopping	Sitrion Social web parts list communities whose sites have been deleted. Private community followers remain followers after losing their access rights.
Data per cycle	All (all communities on the local farm)
Default interval	Hourly (between 3 and 57 minutes past the hour)
Minimum Recommended interval	20 minutes
Maximum Recommended interval	2 hours

NewsGator Daily Activity Publisher Job

Module	Core
First release	v3.0
Function	Globally broadcasts relevant daily alerts and updates. Currently this generates Smart Tips, and also generates alerts when a "published" idea campaign has a start date or end date that is arriving soon, or an active campaign has added new ideas in the past day.
Consequences of stopping	Users will not be warned when a campaign is about to end, about to start, nor will they be alerted when an active campaign has new ideas to view. No Smart Tips will be sent.
Data per cycle	All campaigns that are published, every time the job runs. All of the day's smart tips, up to one per user.
Default interval	Daily (6 am to 7 am)
Minimum Recommended interval	Daily
Maximum Recommended interval	Daily

NewsGator Deleted Users Cleanup Job

Module	Core
First release	v3.0
Function	Marks users deleted in the Sitrion Social database if they are found to have been deleted from Active Directory or from the SharePoint User Profile DB.
Consequences of stopping	Users who have been deleted may still show up in Sitrion Social webparts and @targeting autocomplete lists.
Data per cycle	All. Checks all NG users that have been inactive for over 3 days, in batches of 1000 users at a time.
Default interval	Daily (7 pm to 8 pm)
Minimum Recommended interval	Daily
Maximum Recommended interval	3 days

NewsGator Digest Job

Module	Core
First release	v1.0 / 1.1
Function	Sends a daily digest email to all users who have opted to receive one, summarizing the last 24 hours' microblogging activity and tracked events across all that user's colleagues and communities.

Consequences of stopping	No digest emails get sent.
Data per cycle	A fraction of all users. Default value 5% of those opting to receive the digest, changeable via the "Percentage of user profiles to process during digest job" setting in the NewsGator Social Platform Management page.
Default interval	Hourly (any time of the hour)
Minimum Recommended interval	14 minutes (set % of users to process to 1%)
Maximum Recommended interval	24 hours (set % of users to process to 100% in this case)

NewsGator Farm Content Sync Worker

Module	Core
First release	v3.5
Function	Synchronizes replies to discussion, blog, and idea events from the Social News Stream back into site content, where they become replies on the original item. This job is intended to continuously run and will ping the Enterprise Service Farm twice a minute for batch data to write back to SharePoint's content database(s).
Consequences of stopping	Comments made on discussion or blog items in the stream will not become replies on the original blog or discussion item. (However, replies on the original blog or discussion item will still become new comments on the corresponding stream item).
Data per cycle	
Default interval	1 minute
Minimum Recommended interval	1 minute
Maximum Recommended interval	5 minutes

NewsGator Glassboard Sync Job

Module	Core
First release	v2.1 NOTE: Since the Glassboard integration is no longer supported, this job is obsolete and should be disabled.
Function	Synchronizes social activity for any board that is being followed in Sitrion Social from the Glassboard application back to the Sitrion Social Sphere for that board. Activity the originates from Sitrion Social to a Glassboard board is sent to the board in real time.
Consequences of stopping	No activities from activities posted directly in the Glassboard application will be synched back to Sitrion Social.
Data per cycle	All (all new statuses since the last synch between Sitrion Social and the Glassboard board)

Default interval	Hourly (any time of the hour)
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour

NewsGator Live Analytics Processing Job

Module	Core
First release	v3.5
Function	Makes the Trending Tags and Trending Community Tags lists possible by updating lists of tags that are most active in the last hour, 3 hours, 6 hours, 12 hours, 1 day, 3 days, and 7 days.
Consequences of stopping	Data in Trending Tags web part will not change and will grow stale.
Data per cycle	
Default interval	10 minutes
Minimum Recommended interval	10 minutes
Maximum Recommended interval	1 hour

NewsGator Notification Cleanup Job

Module	Core
First release	v1.0 / 1.1
Function	Purges older user notifications from the NewsGator database. The number of days to keep is a setting in the Job Configuration section of the NewsGator Social Platform Management page.
Consequences of stopping	User notifications build up in the database, causing database size growth, and users who don't regularly dismiss their notifications will see an ever-larger number of them in their Activity Stream web part.
Data per cycle	All (all notifications older than the retention period)
Default interval	Daily (between 12 am and 1 am)
Minimum Recommended interval	Daily
Maximum Recommended interval	Monthly
Usage notes	Having this job run at a longer interval could slow down notification retrieval.

NewsGator Recommendations Job

Module	Core
First release	v3.0
Function	Generates recommendations for users based on Community and Colleague overlap and popularity. Currently only used by the Recommendation tile in Lookout.
Consequences of stopping	New employees or new communities will never be recommended in the Lookout interface. Existing recommendations won't change in response to new activity.
Data per cycle	All users and communities.
Default interval	Daily (8 pm to 9 pm)
Minimum Recommended interval	4 hours
Maximum Recommended interval	2 days

NewsGator Reporting Database Load Job

Module	Core
First release	v1.0 / 1.1
Function	Replicates some of the data in the NewsGator social database each day. Purges data older than the number of months specified in the "Reporting Data Retention" setting from the NewsGator Social Platform Management page.
Consequences of stopping	The Reporting database gets no new data. Badges are no longer awarded.
Data per cycle	All
Default interval	Hourly (20 to 45 minutes past the hour)
Minimum Recommended interval	30 minutes
Maximum Recommended interval	Daily

NewsGator Retention Cleanup Job

Module	Core
First release	v1.0 / 1.1
Function	The NewsGator Retention Cleanup Job removes activity data older than the retention period specified in the Job Configuration section of NewsGator Social Platform services management page, but only for users that are not on the list of users who are on legal hold.

Consequences of stopping	All user activity data is kept. As the default retention period is two years, this won't have an impact for quite a while unless you have shortened the retention period.
Data per cycle	All (All data older than the retention period.)
Default interval	20 minutes
Minimum Recommended interval	15 minutes
Maximum Recommended interval	Daily

NewsGator Social Harvesting Job

Module	Core
First release	v2.1
Function	Replaces Microsoft's Activity Feed Job for the User Profile Service App. Harvests activities from SharePoint's User Profile Changelog and Social Metadata store to be shown in users' activity feeds, while also indexing them in the NewsGator Social Database. This job is cross-farm compatible, the UPA on the Enterprise Service Farm can be a separate instance from the UPA on the local farm in distributed scenarios. Only one instance of this job should be configured per UPA instance.
Consequences of stopping	If the SharePoint Activity Feed Job is not started when this one is stopped, no events of the default SharePoint types will make it to the Activity Stream. Also, badges depending on SharePoint event types will not get awarded. (This job should only be turned on or shut off via the Farm Settings area of the NewsGator Social Platform Management page.)
Data per cycle	All (all new items in SharePoint's User Profile Changelog and Social Metadata store since the last time this job ran)
Default interval	5 minutes
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour
Usage notes	Activating the NewsGator Harvester will disable the Activity Feed Job on the farm. *This job should only be turned on or shut off via the Farm Settings area of the NewsGator Social Platform Management page*.

NewsGator Suggest Ahead Builder Job

Module	Core
First release	v4.0

Function	Does calculations on up to one year's worth of answered questions and one month's worth of unanswered questions and public microblogs. The results of these calculations are used for comparisons that help match posts being typed by the user to potential similar posts, so that the existing posts may be displayed to the user as being possibly similar.
Consequences of stopping	No new questions and microblogs will ever be suggested to users as they enter their post (only old ones from before the job was shut off will be suggested). Because older ones will stop being suggested when they age past one year / one month, if left off for more than a year, no suggestions will appear at all.
Data per cycle	Oldest 500 unanswered questions from the last year (and unanswered questions and public microblogs from the last month) that have not previously been processed by this job.
Default interval	Hourly (any time of the hour)
Minimum Recommended interval	15 minutes
Maximum Recommended interval	90 minutes
Usage notes	Using a longer interval means it won't capture new posts as quickly. Use a shorter interval to have posts appear as suggestions sooner.

NewsGator Top News Processing Job

Module	Core
First release	v2.1
Function	Updates scores used to decide what items to display in the Activity Stream's Top News filter.
Consequences of stopping	The Top News filter results stop changing, and never displays new items.
Data per cycle	All (Any scoring that has taken place since the last time this job ran.)
Default interval	Hourly (any time of the hour)
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour

NewsGator Unanswered Questions Notification Job

Module	Core
First release	v4.0

Function	This job sends two types of emails. The first is a notification email to Q&A curators for questions that have not been answered in the specified number of hours. The second is a notification email to someone who asks a question that has answers prompting them to mark good answers after the specified number of hours.
Consequences of stopping	Curators will not be prompted to answer questions and askers will not be prompted to mark potential good answers accordingly.
Data per cycle	Will generate one email per curator that has questions that are unanswered within the configurable timeframe since the last time the job was ran. Will also generate one email per asker that has answers to questions that have not been marked as good since the last time the job was ran.
Default interval	Hourly (any time of the hour)
Minimum Recommended interval	Hourly (any time of the hour)
Maximum Recommended interval	24 hours

NewsGator User Profile Sync Job

Module	Core
First release	v1.0 / 1.1
Function	Syncs changes from SharePoint's User Profile Service to the NewsGator Social service app (including colleague information, profile picture location, and language selection).
Consequences of stopping	It should be safe to shut off in the short term, but user data will get out of sync, and things will stop working properly, eventually.
Data per cycle	All (all users with changes since the last change token.)
Default interval	5 minutes
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour

NewsGator News Activity Stream Update Job

Module	News Stream
First release	v1.2
Function	Timer job to find recently updated news items that match users interests and updates the Activity Stream

Consequences of stopping	Users will cease to see new activity events from News Stream listing new news items that match their interests.
Data per cycle	All (all new items that match some users search criteria since the last time this job has run)
Default interval	15 minutes
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour

NewsGator News Email Job

Module	News Stream
First release	v1.2
Function	Sends users email digests of News Stream items matching their interests or from their subscriptions.
Consequences of stopping	Users cease to receive email digests of their News Stream items.
Data per cycle	All users who have news items matching their interests who have not received an email in the user designated interval.
Default interval	15 minutes
Minimum Recommended interval	5 minutes
Maximum Recommended interval	1 hour
Usage notes	Users can set the time frame for email notification. Hourly, every 4 hours, daily.

NewsGator News Rapid Retrieval Job

Module	News Stream
First release	v3.1
Function	Retrieves all new content from credentialed feeds that have frequent updating content, such as Twitter, Yammer, Google Reader, SalesForce, and Dynamics.
Consequences of stopping	No new items will arrive from Twitter, Yammer, Google Reader, SalesForce, and Dynamics feeds.
Data per cycle	All new items since the last retrieval.
Default interval	2 minutes
Minimum Recommended interval	2 minutes

Maximum Recommended interval   10 minutes

NewsGator News Retrieval History Cleanup Job

Module	News Stream
First release	v1.2
Function	Timer job to clean up feed retrieval history.
Consequences of stopping	The feed retrieval history table will continue to grow. This will eventually cause performance issues. If you are no longer running the NewsGator News Retrieval job, this one can be stopped as well.
Data per cycle	All (deletes all rows with an update data less than the retention date).
Default interval	Daily (between 1 am and 2 am)
Minimum Recommended interval	Hourly
Maximum Recommended interval	Daily

NewsGator News Retrieval Job

Module	News Stream
First release	v1.2
Function	Retrieves all new content from subscribed news feeds, except for those handled by the NewsGator News Rapid Retrieval Job (News Stream module)
Consequences of stopping	No new syndication content will be available to users for their regular RSS subscriptions. Nothing else will be impacted.
Data per cycle	A fraction of the feeds in the system. The job will guarantee that each feed gets retrieved once an hour. It will split the number of feeds is has to retrieve in each cycle to achieve once an hour.
Default interval	15 minutes
Minimum Recommended interval	15 minutes
Maximum Recommended interval	1 hour (if you run once an hour it will retrieve all feeds in each run of the job)

NewsGator News Stream - Activity Event Cleanup Job

Module	News Stream
First release	v1.2
Function	Timer job to clean up old Activity Stream Events and associated Syndication Items.

Consequences of stopping	Stopping this could be bad if you have a lot of feeds in the system. New syndication items come in all the time. If you stop removing as events age, this table will grow large fast. If you are not running NewsGator Retrieval job it is not necessary to run this job.
Data per cycle	All (all items no longer in the feed and not associated to an activity event are cleaned up each run of the job, processing 500 items at a time until there are no more old items.)
Default interval	Hourly (any time of the hour)
Minimum Recommended interval	15 minutes
Maximum Recommended interval	1 hour

NewsGator News Stream - Audience Subscription Maintenance Job

Module	News Stream
First release	v2.6
Function	Subscribes a user to any feeds that are assigned to an audience when the user has been added to the audience.
Consequences of stopping	Users who are added to an audience will not get that audience's feed subscriptions.
Data per cycle	All audiences are processed each time the job runs.
Default interval	Daily (between 2 am and 3 am)
Minimum Recommended interval	Hourly
Maximum Recommended interval	Daily

NewsGator Subscription Activity Stream Update Job

Module	News Stream
First release	v2.1
Function	Timer job to find recently updated news items in user subscriptions and update the Activity Stream.
Consequences of stopping	Users will cease to see new activity events from News Stream listing new news items from their personal feed subscriptions.
Data per cycle	Users who have subscriptions to feeds that have new data in the interval since the last time the job ran.
Default interval	15 minutes

Minimum Recommended interval	1 minute
Maximum Recommended interval	1 hour

NewsGator Spotlight Expertise Processing Job

Module	Spotlight
First release	Split from NewsGator Spotlight Processing Job in v4.5.128
Function	Gathers and calculates Expertise scores.
Consequences of stopping	Expertise data will be stale in Knowledge Explorer.
Data per cycle	All (All activity events added to the reporting tables since the last time the job ran. Pulls and processes 2000 at a time, but processes *all* new ones each job run.)
Default interval	Hourly (20 to 45 minutes past the hour)
Minimum Recommended interval	15 minutes
Maximum Recommended interval	Daily
Usage notes	To immediately process all Expertise data, run this job. To include all new Spotlight data, run the NewsGator Social Harvesting Job and then the Reporting Database Load Job before running this job.

NewsGator Spotlight Recognition Processing Job

Module	Spotlight
First release	Split from NewsGator Spotlight Processing Job in v4.5.128
Function	Counts events for Recognition and awards Badges.
Consequences of stopping	Recognition webparts will cease to progress. No badges will be awarded.
Data per cycle	All (All activity events added to the reporting tables since the last time the job ran. Pulls and processes 2000 at a time, but processes *all* new ones each job run.)
Default interval	Hourly (30 to 55 minutes past the hour)
Minimum Recommended interval	15 minutes
Maximum Recommended interval	Daily
Usage notes	To immediately process all Expertise data, run this job. To include all new Spotlight data, run the NewsGator Social Harvesting Job and then the Reporting Database Load Job before running this job.

NewsGator VideoStream Like Count Synchronization Job

Module	Video Stream
First release	v2.0
Function	The Like count shown on a video page can get out of sync with the Like count shown in the activity feed (due to a limitation in the API of Sitrion Social Core). This job ensures the like count shown on the video page matches the like count shown in the activity feed.
Consequences of stopping	Video center page may not sort videos properly when sorting by number of likes. Video Page may display the wrong number of likes.
Data per cycle	All (All SocialSites Core activity event log entries since the last time the job ran.)
Default interval	5 minutes
Minimum Recommended interval	1 minute
Maximum Recommended interval	30 minutes

NewsGator VideoStream Management Job

Module	Video Stream
First release	v2.0

Function	This job has two responsibilities 1) Find newly added videos in video stream asset libraries and copy them to the encoding input folder 2) Copy newly encoded videos to the streaming server.
Consequences of stopping	No newly added videos will get encoded or added to the streaming server and therefore will never be available for viewing. This job is necessary for Video Streams to work.
Data per cycle	All (All videos newly added by users anywhere in the farm, and videos that have completed encoding since the last time the job ran.)
Default interval	5 minutes
Minimum Recommended interval	1 minute
Maximum Recommended interval	30 minutes
Usage notes	Having this job run at a longer interval will introduce a longer lag time between upload and video available for viewing.

NewsGator Knowledge Base Like Count Synchr

Module	Enrich
First release	v3.0
Function	The Like count shown on a knowledge base page can get out of sync with the Like count shown in the activity feed (due to a limitation in the API of Sitrion Social Core). This job ensures the like count shown on the knowledge base page matches the like count shown in the activity feed..
Consequences of stopping	Like counts on knowledge base items will be inaccurate.
Data per cycle	
Default interval	5 minutes
Minimum Recommended interval	1 minutes
Maximum Recommended interval	1 hour

Sitrion Social News Stream Module

Overview

The News Stream module for Sitrion Social provides RSS and ATOM feed aggregation, filtering and distribution capabilities which are tightly integrated into the Sitrion Social base module. News Stream also provides a way to easily monitor social streams from several major services.

News Stream is an optional module which requires the functionality provided in the base Sitrion Social product. However, it includes a completely separate managed service application, separate database, and its own jobs to provide its added functionality.

The News Stream module provides four alternate ways to get RSS and ATOM feed content to users. Three of these are based on a systemwide set of feeds that are configured by a News Stream administrator. These three are:

- The News Query web part
- The News Search web part
- Stream display of articles matching user-defined keywords

Of these, only the last one gives the end user any control over the content seen, although this content is still limited to the admin-defined system feeds. See the **Defining the system feed collection** section below to learn how to define the feeds that will be used by these, and the **Specifying News Stream Administrators** section for how to specify who can define these feeds. If deploying the News Query web part, you'll also need to follow the instructions in the **Filtering - Creating and Managing Queries** section first.

The fourth way allows users to subscribe directly to any feed for which they have the subscription information, including integration with individual's external Twitter, Yammer, SalesForce, and Dynamics CRM accounts. Periodic alerts in the user's stream will inform of new articles that have arrived in the user's subscribed feeds.

All four means of distribution are optional. In particular, administrators can maintain complete control over what feed content gets into the system by not allowing direct user subscriptions. Unchecking the **Enable News Activities** setting will remove both the options for stream display of articles, either by keyword matching or by direct subscription. To eliminate just the direct subscriptions option, the **Allow Personal Subscriptions** option should be unchecked. Both these options are described below in the **Allowing or disallowing personalization** section.

See the **Adjusting article retrieval, distribution, and retention/cleanup behaviors** section for details on configuring the jobs that retrieve, distribute, and clean up feed content.

As of the 4.0 version of News Stream, deployment on either SharePoint 2010 or SharePoint 2013 is supported. Correspondingly, this module no longer indicates in its name a SharePoint version number (2010 or 2013).

☞	FIND MORE INFORMATION: Sitrion Social v5.5 User Guide Sitrion Social v5.5 Release Notes

Specifying News Stream administrators

Before you can begin using the functionality, you will need to at least configure an account with appropriate permissions.

The basic means for distributing news articles to end users requires having a centrally created and administered collection of feeds that can be queried in various ways to deliver articles of interest to users. You specify which people may create and maintain this collection of feeds by granting each of them the Manage Feeds permission for the NewsGator News Stream Service Application. In Central Admin after highlighting this service, click the Administrators button in the ribbon.
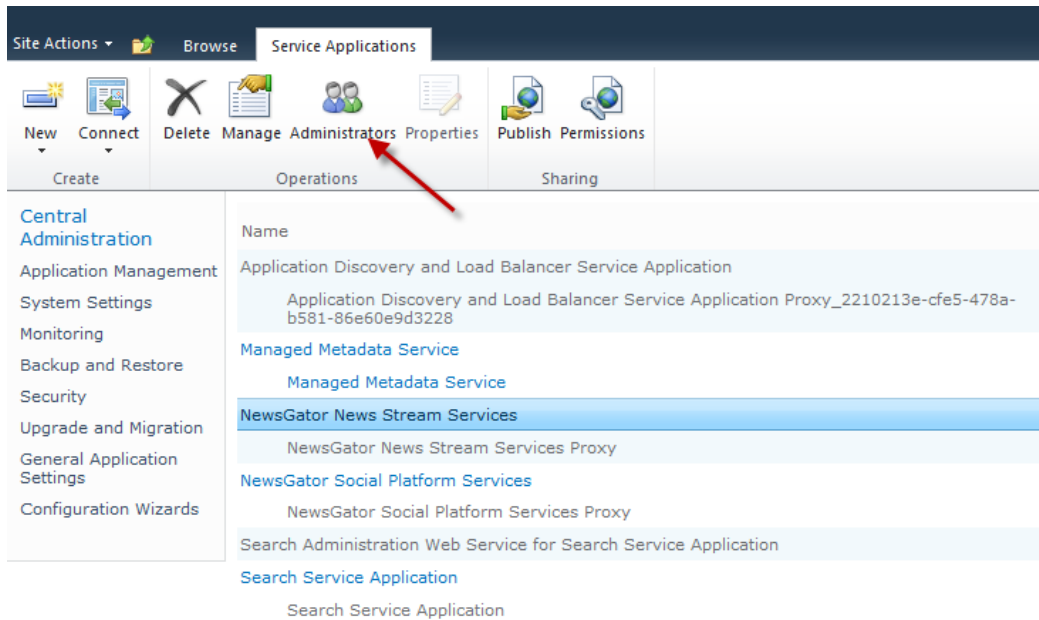
This will display the dialog for selecting people and giving them the appropriate permission.
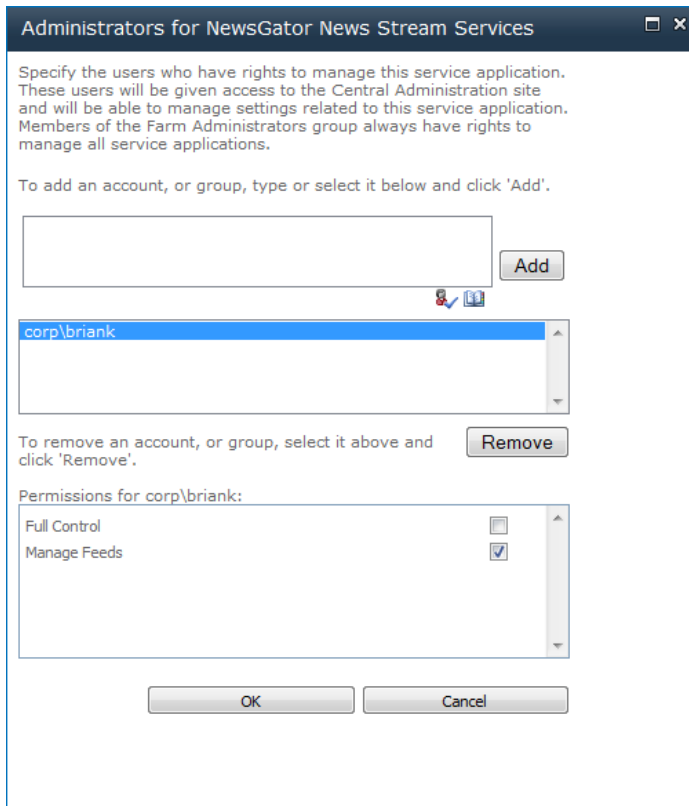
If you have difficulty opening or using this dialog, you can do the same things in another UI, by clicking the text of the NewsGator News Stream Services application above (instead of just highlighting its row). This brings up the News Stream Service application's management page. One its sections looks like this:
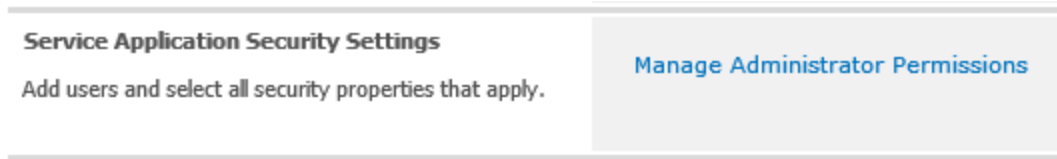
Clicking the Manage Administrator Permissions link brings up the following page:

The only additional step required when using this interface is that you must first specify the web application that is associated with Sitrion Social.

Correcting basic failures

This steps in this section can help if you are getting certain News Stream errors reported in your event logs, or if News Stream data is failing to appear in some or all of the places that it should.

The first subsection below shows where you can view some debugging information.

Some problems that may occur during installation can be resolved without need of rerunning the installer. The middle three subsections below each describe a section within the NewsGator News Stream Service Application's management page that allows you to repeat a News Stream installation step in isolation, should something have gone wrong with it during (or after) installation or upgrade.

The fifth subsection below describes a possible solution for failures retrieving external feeds.

To get to the management page that contains these settings, go to the Manage Service Applications screen within SharePoint Central Administration. On that screen, click on "NewsGator News Stream Services":

NewsGator News Stream Services

NewsGator News Stream Services Proxy

Debug section

Database connection: Data Source=TOMM1;Initial Catalog=NewsGator_NewsManager;Integrated Security=True;Enlist=False;Connect Timeout=15

Debug from backend proxy:Service running: 10/9/2013 7:15:00 PM

At the bottom of the News Stream Service Application's management page is a section like the one pictured here showing debug information for the database connection and the backend proxy.

The first string shows roughly what you'll see if the connection to the database is good, so that your service app can access the database. If instead there is a failure message, you'll need to figure out why the News Steam service application cannot access the database. A good first step is to ensure the identity used by the application pool that the News Stream Service Application is running under has rights to access the database. (Full troubleshooting of database connection problems is beyond the scope of this document.)

The second string will show you whether the News Stream Service Application's backend proxy is responding. If not, you may be able to fix it by reprovisioning it, as described below in the subsection "Service Application Proxy section".

Database Maintenance section

Database Maintenance

Click 'Run Database Scripts' to run the News Stream 2010 database scripts. This will not affect existing data.

Run Database Scripts
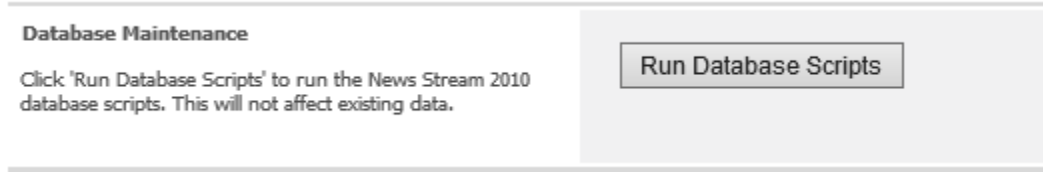
When you are installing or upgrading Sitrion Social, scripts are run to create or update the database schema and stored procedures. If you are having problems with your News Stream installation, and errors are showing in your event log such as News Stream stored procedures that are missing parameters, or columns not existing in certain News Stream tables, you'll want to try rerunning your database scripts to fix these problems.

To rerun them, come to the Database Maintenance section and click the Run Database Scripts button. When the scripts have completed, you'll see the message "Database successfully upgraded" appear beneath this button.

Service Application Proxy section

Service Application Proxy

Click on the 'Provision' button to provision the application proxy if it doesn't exist.

Unprovision

Proxy URI: urn:schemas-microsoft-com:sharepoint:service:9dd31aca8d0c4b4d87dd240ceb2c014f#a n:uuid:8af28532f17b45a7bc3ee67e9b220a98&authority=https:/. 844/Topology/topology.svc
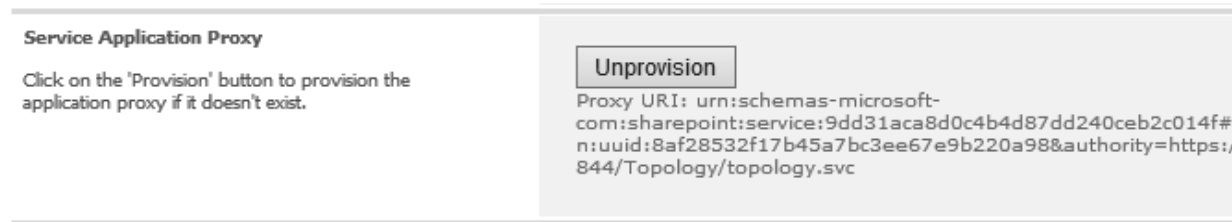
The News Stream Service Application Proxy is an essential component of the News Stream module, without which SharePoint front-end servers cannot communicate with the News Stream Service Application. It is initially provisioned during any install or upgrade of Sitrion Social.

If News Stream web parts are displaying error messages where they should be displaying data, and/or if you see warnings in your SharePoint server's application event log referring to communication problems with the NewsGator News Stream Service Application or the NewsGator News Stream Service Application Proxy, or the debug information on the News Stream Service Application's management page shows that the proxy is not responding (see "Debug section", above), try reprovisioning the proxy by clicking the Provision button in this section. You may have to click "Unprovision" first, at which time the button text will change to say "Provision". If successful, the Proxy URI should be displayed below the button, as pictured above.

If the News Stream Service Application Proxy already exists, you will see an Unprovision button here, and the Proxy's URI will be displayed. In supported Sitrion Social configurations this proxy is essential for communication with the service application to occur, so it is not recommended to unprovision the proxy (unless you reprovision it shortly thereafter).

Activity Templates section

In SharePoint 2010, each time an event occurs that will produce a new entry in the activity stream, an activity template that matches that event's type is used to create the text for the activity stream entry for the event. Sitrion Social adds many additional types of activity to the SharePoint activity stream by provisioning activity templates to the SharePoint social platform. This is initially done during any install or upgrade of Sitrion Social. The News Stream module creates events of its own, and so has activity templates of its own to provision.

If you believe that you are not seeing any of the News Steam's events in the stream that you should be, come to this section of the NewsGator Social Platform management page. If properly provisioned, you should see a message like "Activities have been provisioned in the SharePoint social platform", as pictured above. Otherwise, click the Provision button to add these activity types.

For difficulties retrieving external feeds

If your organization uses a proxy server for internet access and News Stream is having trouble retrieving feeds from outside your company, it should help to inform News Stream of the proxy server. To do so, find the **Job Configuration** section of the management page (pictured below). Identify your proxy server in the **Proxy server used in News Stream Retrieval Job** box, then click the **Save** button immediately below this.

Adjusting article retrieval, distribution, and retention/cleanup behaviors

News Stream has several jobs which perform the behind-the-scenes work of retrieving, distributing, and cleaning up articles and related News Stream content. These can be seen by clicking "Review job definitions" in the Monitoring section of SharePoint Central Administration:

Here you can adjust when and how frequently each job runs. The individual jobs are described below.

There is also a **Job Configuration** section within the News Stream Service Application's management page that allows you administrative control over some of the behaviors of these jobs:

These settings are described below with their associated jobs.

Retrieval

The **NewsGator News Rapid Retrieval Job** retrieves all new content from credentialed feeds that have frequently updating content, such as Twitter, Yammer, SalesForce Chatter, and Dynamics CRM.

The **NewsGator News Retrieval Job** is doing the aggregation of all other feed content. The service attempts to update every feed in the system within one hour. Each time this job runs, it attempts to retrieve all new content from a fraction of the total feeds in the system. For example, if this job runs every 15 minutes, it will attempt to retrieve one quarter of all the feeds each time it runs. Retrieving a great number of feeds will create significant load. While sizing will be dependent on hardware (and to some degree, the nature of the feeds being retrieved), we recommend that you do your initial deployment with 500 or fewer feeds, a fifteen-minute retrieval cycle, and two threads.

The second box in the Job Configuration section lets you configure the number of threads allowed for news retrieval. This setting will affect the tradeoff between time to retrieve and the overall load placed on the server.

Retrieval behavior: older posts on live feeds are not retrieved

The following is not a configurable behavior. It is described here to provide understanding.

In some situations, an article can be created with a published date that is in the past. Prior to the 3.1 release, News Stream would not create activity stream items from such articles to avoid publishing out-of-date news into the stream. Since the 3.1 release, if the publish date is within 72 hours of the current time, News Stream will add the article to the stream. For SharePoint feeds that do not have a publish date within 72 hours of the current time, News Stream looks at the description of the article for fields that may contain the publish date. If there is a publish date within 72 hours in a publish date field in the description, News Stream will add the article to the stream. The publish date of the article is kept as it appeared in the source feed (e.g. if an article has a published date that is 30 hours in the past, it will be added to the stream and the published date will be kept at 30 hours in the past).

Distribution

The **NewsGator News Activity Stream Update Job** is responsible for searching newly retrieved articles to determine which users have a declared news interest that matches the article. When there is a match, the user is informed of the new article in their activity stream. It will attempt to check all the users' interests against an admin-specified number of newly retrieved articles within each cycle. The load created by this job will depend on the number of users, number of interests, and size of the "Number of items to update in Activity Stream at a time" setting. Initially, it makes sense to run this job every thirty minutes. If you find you have a very large number of users with a very large number of interests, you may want to set this to longer intervals.

The **Number of items to update in Activity Stream at a time** setting, just discussed, is set in the third box in the Job Configuration section. It determines how many articles the NewsGator News Activity Stream Update Job checks for distribution in each run of the job. If this number is set too high, it is possible to get SQL timeout errors. If the number is set very low, it can take the job a long time to get through all new articles. The default of 1000 was picked by testing on a server with very modest resources.

The **NewsGator News Email Job** sends out the digest emails of the news stories which match user interests. This job should typically be set to run at least hourly as this is the shortest interval users can specify for receiving emails.

The **NewsGator News Stream - Audience Subscription Maintenance Job** subscribes a user to any feeds that are assigned to an audience when the user has been added to the audience.

Cleanup/Retention

The News Stream module keeps a log of every attempt at retrieving content from a feed. The older content in this Feed Retrieval History must be regularly purged or else the log would grow quite large over time. This is what the **NewsGator News Retrieval History Cleanup Job** does.

If you are no longer running the NewsGator News Retrieval job, this job can be stopped as well.

By default, the last 30 days of the Feed Retrieval History are kept at any time. This number of days for which this job retains each article can be changed using the first box of the Job Configuration section.

The **NewsGator News Stream - Activity Event Cleanup Job** deletes old feed content, as well as any "lookup" items that reference that content. In other words, it deletes articles synopses from subscribed feeds, and data about each article such as the author and any tags on it or links. It also deletes the information used when a user clicks "Expand" in one of the activity stream events that alert a user to new articles:
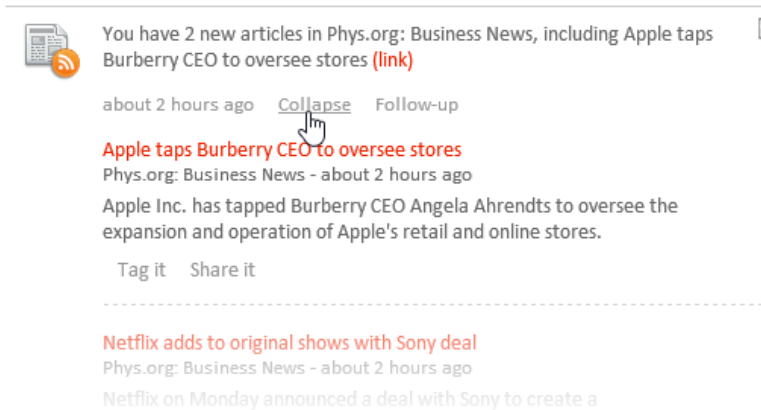
This is the information that connects the stream event to the multiple downloaded articles that it lists. If one of these stream events still exists but the articles that it references are gone, deleting this information will prevent attempts to retrieve and display the non-existent article synopses when the user clicks "Expand".

The **Days to keep event lookup items** setting determines how long feed content and the lookup data that references it are kept before this job cleans them up. A shorter time here increases the chance that a user looking at an older alert to new articles in their stream will not see the articles listed upon expanding that alert. A longer time here increases the percentage of article sysnopses in your News Stream database that aren't pointed to by any News Stream alerts in the Activity Stream.

If you are no longer running the NewsGator News Retrieval job, this one can be stopped as well.

Central management of feed subscriptions

The basic way that News Stream gets syndicated articles to end users is to define a set of system feeds and then use keywords or more sophisticated queries to select articles from those feeds for viewing (the other way, via direct feed subscriptions to individual end users, will be covered later).

This section will explain how to define the system feeds. It will then explain how to set up queries for use with the News Query web part. Queries allow you to hone the selection of articles that are displayed much more precisely than keyword searches can. However, it is not necessary to set up any queries to make use of the system feed collection, as other interfaces allow extracting and viewing articles from it based on keyword searches.

Defining the system feed collection

Navigating to the Manage Feeds page

Any people who have been granted the Manage Feeds permission on the NewsGator News Stream Service Application (see **Specifying News Stream administrators**, above) will be able to define and manage the collection of system feeds. To allow navigation to the administrative page for managing these central organizational subscriptions, a "Manage Feeds" link is provided to these users in four different places:

a) In the Content Management section of the management page for the News Stream Managed Service Application
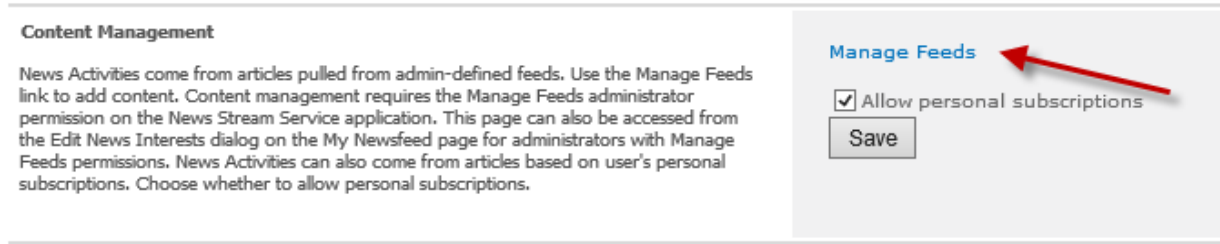
b) In the "Edit News Interests" dialog, accessible via a link on the Activity Stream web part on the My Newsfeed page

c) In the equivalent tab within the Settings dialog
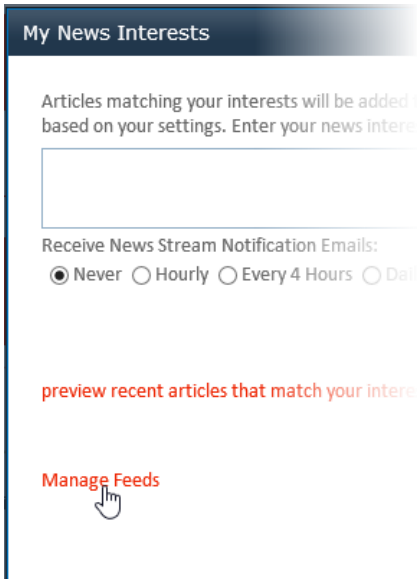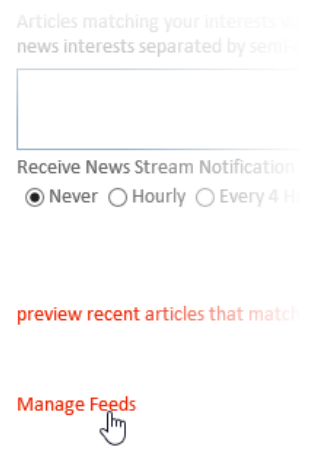
d) On the News Stream Administration page, which can be accessed from your personal Welcome menu
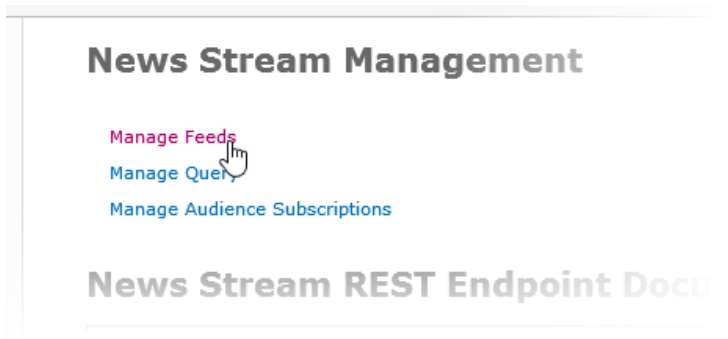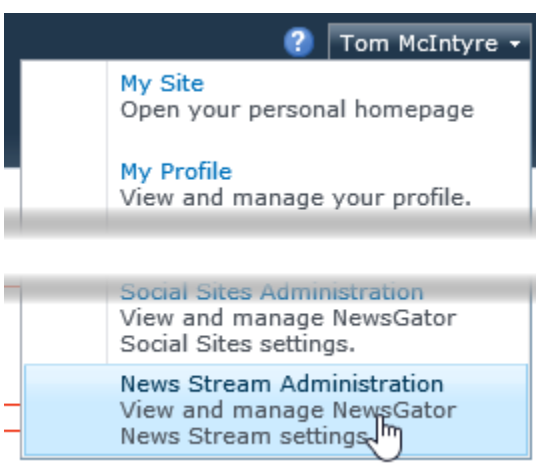
Feed administrators can also navigate directly to this page by going to http://<host>/_layouts/ng/nm/ManageFeeds.aspx.

Managing feeds

The manage feeds screen with subscriptions already on it looks like this:

Title	Last Retrieved	Last Queued	Last Content Update	Last Status	NG Status	
Tech Beat - BusinessWeek	12/3/2010 1:00:29 PM	12/3/2010 12:16:33 PM		304	Success	
Tech Law Prof Blog	12/3/2010 2:00:49 PM	12/3/2010 1:16:35 PM		304	Success	
Tech News Tube RSS Feed	12/3/2010 12:25:39 PM	12/3/2010 12:16:33 PM	12/3/2010 12:25:39 PM	200	Success	
Tech RSS feeds	12/3/2010 12:45:18 PM	12/3/2010 12:16:33 PM	12/3/2010 12:45:18 PM	200	Success	
Tech Support Forum	12/3/2010 12:05:21 PM	12/3/2010 11:32:34 AM	12/3/2010 1:07:11 AM	503	Error	
Tech Support Guy Forums	12/3/2010 1:55:06 PM	12/3/2010 1:16:35 PM	12/3/2010 10:39:49 AM	304	Success	
Techage, le site officiel des revues PC Update et Hardware Magazine	12/3/2010 1:35:34 PM	12/3/2010 1:16:35 PM		200	No pub date	
Techbargains.com	12/3/2010 12:11:57 PM	12/3/2010 11:32:34 AM	12/3/2010 12:11:57 PM	200	Success	
Techbargains.com	12/3/2010 12:05:39 PM	12/3/2010 11:32:34 AM	12/3/2010 12:05:38 PM	200	Success	
Techbargains.com	12/3/2010 12:02:15 PM	12/3/2010 11:32:34 AM	12/3/2010 12:02:15 PM	200	Success	

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In this pictured example, the search box in the upper right has been used to filter down to specific feeds whose titles begin with that string.

The base display shows feeds in the system along with data on their retrieval. The "Ping" (globe with arrows icon) function will attempt an immediate retrieval of the feed. Ping does not work for feeds which require credentials to be retrieved. The "Details" (rectangular box icon) function will show information about prior retrieval attempts while the "Delete" (red X icon) function will stop the further content from that feed from being retrieved (but does not remove existing articles from the database). The screen below shows an example detail view:

Last Retrieved	Http Status Code	New Items	Items Updated	HTML Call Duration	Total Retrieval Time	ServerId
12/3/2010 12:13:28 PM	200	7	1	0.672S	2.311S	9818ef04-0440-4731-9879-71724b57829b
12/3/2010 12:13:28 PM	200	7	1	0.845S	2.21S	9818ef04-0440-4731-9879-71724b57829b
12/3/2010 9:02:02 AM	200	3	2	0.618S	3.321S	9818ef04-0440-4731-9879-71724b57829b
12/3/2010 9:02:02 AM	200	3	2	0.653S	3.287S	9818ef04-0440-4731-9879-71724b57829b
12/3/2010 6:48:00 AM	200	2	1	0.703S	2.647S	9818ef04-0440-4731-9879-71724b57829b

The "Show" filter allows viewing which haven't updated recently or which have errors. This is useful for identifying feeds that you may want to remove from the system.

Show: Feeds with errors
All Feeds
Feeds not recently updated
Feeds with errors
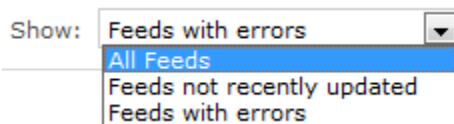
Adding Feeds

Click the Add Feeds button on the Manage Feeds page to begin adding a new system feed subscription. This opens the dialog shown below.

If the feed requires credentials to be retrieved, they can be entered in the Username and Password boxes. A domain may be specified in the Username field (e.g. domain\username). IMPORTANT NOTE: All feeds will be treated as public content. All content retrieved from all feeds will be available to all users. Later versions of News Stream will support the concept of individual feeds being securely retrieved for and only visible to individual users.

Also note that search feeds created in external systems such as Google News (http://news.google.com) and Twitter (http://search.twitter.com) are an easy way to bring in focused streams of content. NewsGator also ships lists of high quality feeds grouped into categories such as business, law and technology with the News Stream module. These same lists can also be downloaded from the NewsGator extranet (contact Tech Support if you need help accessing these). These lists (and any other properly formatted OPML files) can be imported through the dialog on the lower half of the screen.

Pushing personal subscriptions

Subscribe an audience to a feed

In some cases, administrators will know that specific users should receive specific content. News Stream contains a mechanism to automatically subscribe a SharePoint audience to one or more feeds. This creates a personal subscription for each member of the audience. A SharePoint audience can be defined using profile properties (e.g.

Department contains "sales"), distribution lists or Active Directory security groups. This News Stream feature does not create audiences – it uses audiences that have already been defined in SharePoint Central Administration.

When a user with the "Manage Feeds" permission on the NewsGator News Stream Service clicks the "Manage Feeds" link from the "Edit News Interests" dialog in the activity stream, or clicks the "News Stream Administration" option in her welcome menu (pictured), she is taken to a page with three main choices (also pictured).
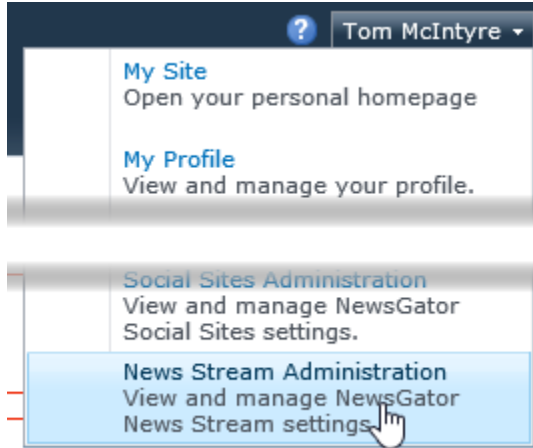
Clicking "Manage Audience Subscriptions" takes the admin to the page where existing subscriptions may be edited and new ones may be added. Clicking the Add button brings up this dialog:

Audience is picked from a pull-down list. Auto-Tag lets you choose to add a hashtag to these feeds automatically. The "Locked" option means that an end user cannot remove this subscription – this is useful if you have official news that you want to ensure gets delivered. You can choose to apply as many feeds as you want to the audience. In this example, "Forbes" is used as a filter and two feeds are selected.

NOTE: This interface will show personal subscriptions as well as public subscriptions added for the whole company. In this way, an administrator can subscribe to a feed (for example a feed which needs credentials) as a personal subscription and then use that as a way to add a subscription for others.

After Add is clicked, the subscriptions are added for users and the new audience is listed on the initial page.
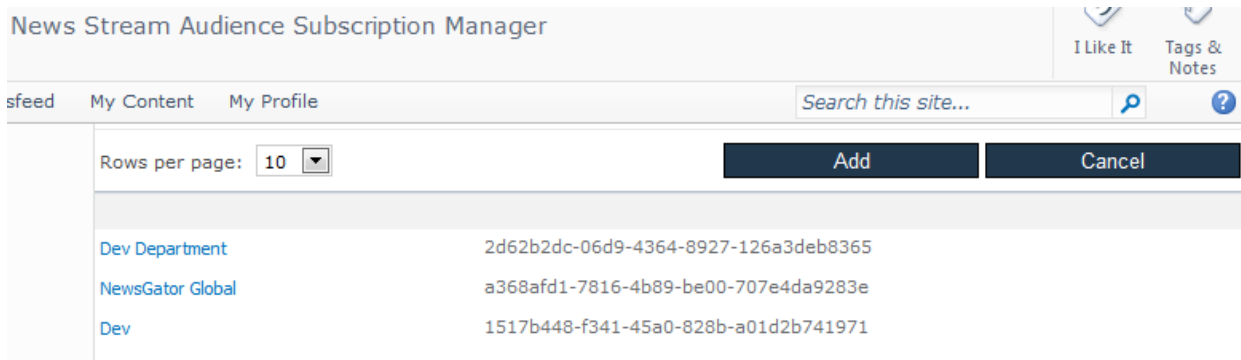
An administrator viewing these subscriptions from the Edit Subscriptions dialog sees them with the option to stop following.
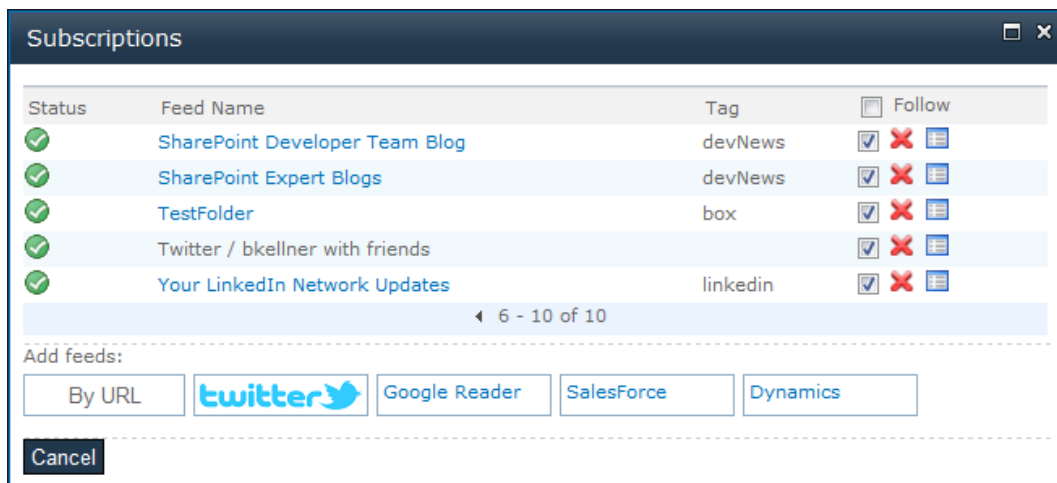
For a non-administrative user, the subscriptions appear without the choice to stop following because of the "locked" setting.
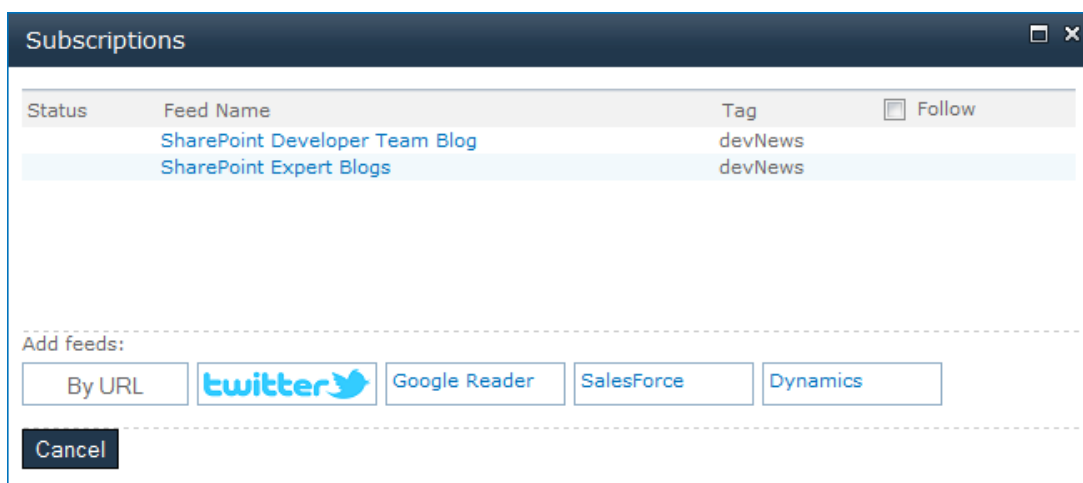
Important Notes:

- New users who are added to an audience will automatically get the subscriptions added on the next run of the NewsGator News Stream - Audience Subscription Maintenance Job
- While subscriptions may be added in this way, removing the subscription from the audience does not remove it from all the users. The reason for this is that users may have already chosen to add that feed as a personal subscription. Locked subscriptions will automatically be unlocked when the subscription is removed from an audience.
- Similarly, a user leaving an audience does not automatically remove the subscriptions that came from being in that audience. The user can still remove them from the Edit Subscriptions dialog.
- If you were using a credentialed feed that someone added personally, and that person deletes that feed from their personal subscriptions, the feed will no longer provide updates to the audience.

Subscribe everybody to a feed

The ability to subscribe a SharePoint audience of users to a feed is a great for ensuring that news is being shown to specific groups of users. However, when the goal is to make sure that the news is shown to every user who views the activity stream, it's much more efficient to use the global subscription capability.

From the same News Stream Audience Subscription Manager page used for subscribing an audience to a feed, click the "add" button.
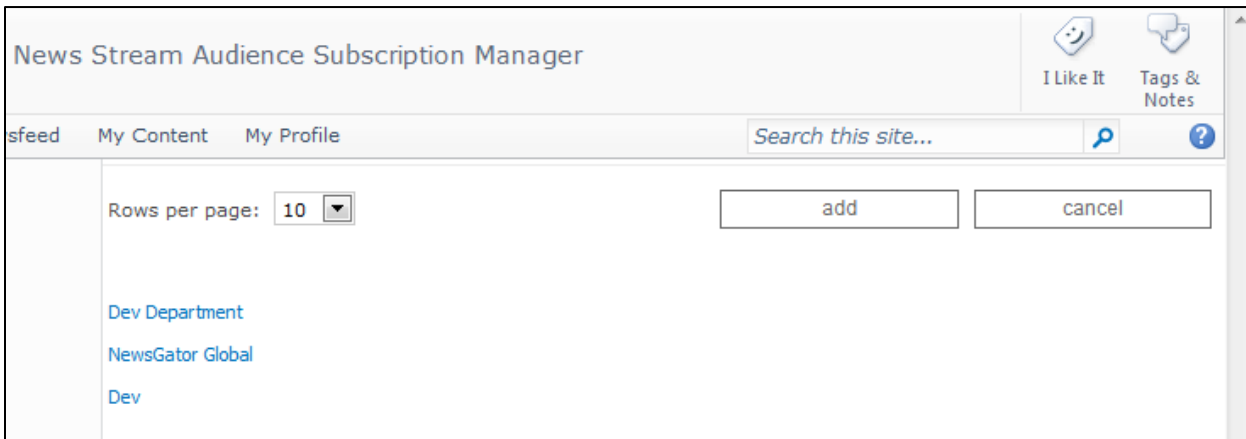
To make a global subscription instead of an audience-based subscription, check the "Is this a Global Subscription?" box.

Checking that box tells the system that every user should see the articles from this feed when the Subscription Activity Update job runs. The rest of the options on this page function as they do when making an audience-based subscription.

Note that if you already have subscriptions applied to audiences that were global audiences, and you want to use this more efficient approach, you will need to contact NewsGator Support for details on deleting the old subscription record.

Filtering – Creating and Managing Queries

This section describes the intermediate step between defining the system feed collection (see **Defining the system feed collection**, above) and deploying the News Query web part (see below).

The administrator-defined system feeds can be queried in a variety of ways to display articles matching a particular theme, and/or from a particular set of system feeds. While the display of a query's matching results is done via an instance of the News Query web part, definition of the queries available in this web part is done separately on the **Manage Query** page. This central UI allows the adding and editing of all queries available to the News Query web part.

To get to the Manage Query page, you must have the Manage Feeds permission (see the **Specifying News Stream Administrators** section for instructions on how to get this). You then have two options for navigating there.

The first is to go directly to the link http://<host>/_layouts/ng/nm/ManageQuery.aspx.

The other begins with selecting the "News Stream Administration" link at the bottom of your Welcome menu:
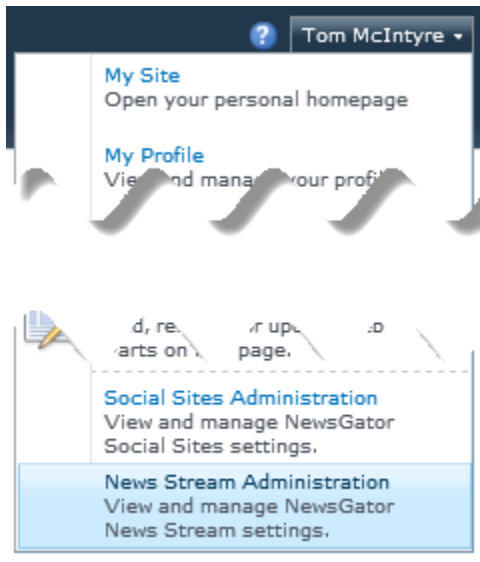
... and concludes with selecting the Manage Query link on the News Stream Management page:

News Stream Management

Manage Feeds

Manage Query

Manage Audience Subscriptions

News Stream REST Endpoint Docu

The following is an example of what the Query Management page looks like with some queries already defined:

Query	Type	Search String
Microsoft SharePoint	Keyword	Microsoft AND SharePoint
ALl Things Pasta	Keyword	pasta or noodles
Broncos	Keyword	Broncos
Keyword Single - Browns	Keyword	Browns
Keyword - Colts AND Football	Keyword	Colts AND Football
Keyword - Colts OR Football	Keyword	Colts OR Football
Tag Single - Seahawks	Tag	Seahawks
Tags - Football;Browns	Tag	football;browns
Tag - browns;football	Tag	browns;football
Tag - newsgator;football	Tag	newsgator;football
1 - 10 ▶		
		Add

Clicking a query name displays it for editing. Clicking the "Add" button brings up a dialog to create a new query.
Below is the query creation screen with a new query in progress.

| Add | Cancel |

Query Name

Four Wheel News

Search Type

Keywords can be combined with AND and OR. Example: NewsGator AND SharePoint.

Tags are separated by semi-colons.

All will include all articles from the included feeds.

○ Keywords ○ Tags ○ All

(cars or trucks) not (cycles or bikes)

Included Feeds

Select the feeds that will be included in the search. If no feeds are selected, all feeds will be included.

Search: auto

auto industry news - Google News ☑

autoevolution ☑

Automotive Articles from EzineArticles.com ☑

Automotive News latest RSS headlines - Big News Network.com ☑

Automotive News latest RSS headlines - Big News Network.com ☐

| Add | Cancel |

The query should have a descriptive name for users to select in the web part. The query can either search against the content of the articles or the tags on the articles. The query itself can be quite complex – the Boolean operators and, or, not, and near are supported along with grouping via parentheses (see examples below). By default, the query will search all the feeds. However, specific feeds can be chosen to make the results even more precise. If this is done, only articles from those feeds which match the selected criteria will be displayed. Finally, it is possible to simply select the "All" option for a set of one or more feeds and not specify any search. In this case, all the articles from the selected feed(s) will be included in the query results.

Below are some example queries which are supported followed by how these are interpreted by SQL Full Text Search

"cars trucks", "cars & trucks"

"cars and trucks", "cars & trucks"

"cars near trucks", "cars ~ trucks"

"cars&trucks", "cars & trucks"

"cars or trucks", "cars | trucks"

"cars |trucks", "cars | trucks"

"cars!trucks", "cars &! trucks"

"cars+trucks", "cars & trucks" //plus is same as AND

"cars- trucks", "cars &! trucks" //minus is same as NOT

"cars and not trucks", "cars &! trucks"

"joomla, iphone, apple, adobe, open source", "joomla & iphone & apple & adobe & open & source"

"(cars or trucks) not convertibles", "(cars | trucks) &! convertibles"

"401(k)", "401 & (k)"

"(cars or trucks) and not convertibles", "(cars | trucks) &! convertibles"

"(cars and trucks) not (motorcycles or bikes)", "(cars & trucks) &! (motorcycles | bikes)"

Setting up and configuring the interface for end users

Output

In addition to the personalization options available to users just described, News Stream provides three web parts for displaying articles. Two of these, the **News Query** and **News Search** web parts, show content from the centrally-managed system feed collection. Which articles they show is configurable by site admins, and not by end users. The other one, **News Subscriptions**, provides an avenue for showing All three are described below. When adding web parts to a web page, these two are listed within the NewsGator News category.
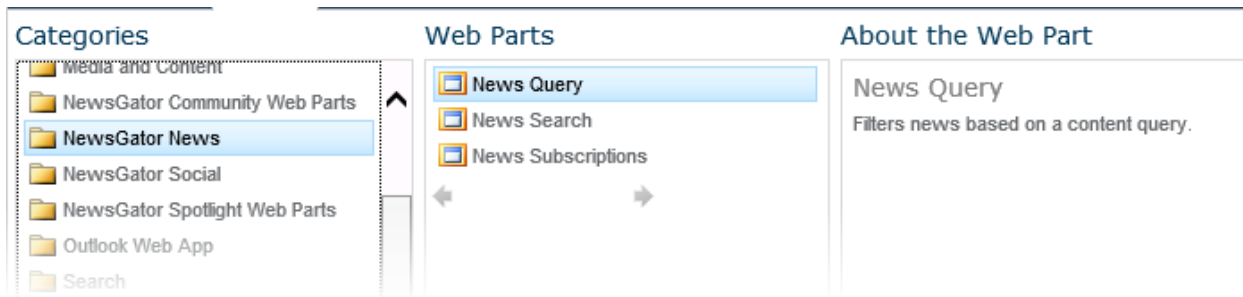
News Query Web Part

This web part works with the centrally defined queries described above (see **Defining the system feed collection** and **Filtering - Creating and Managing Queries** for instructions on setting these up). The site owner simply chooses the desired query from the web part settings. When first added to the page, the News Query part prompts the user to select a query.
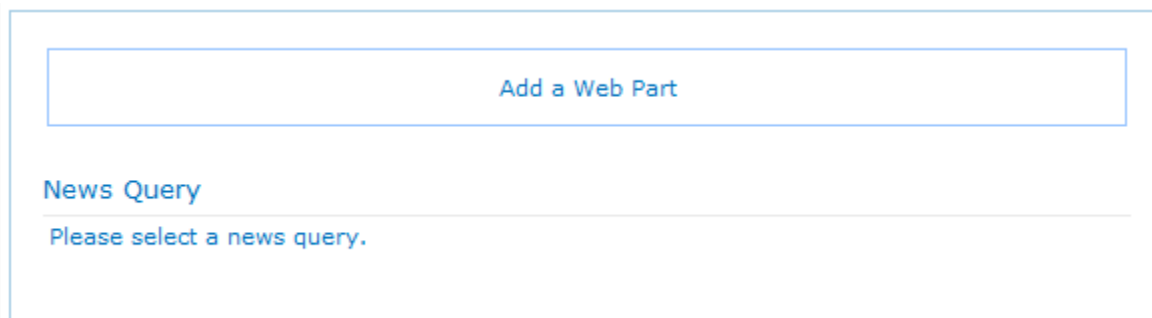
Pick one of the already created queries, and give the web part a more descriptive title.
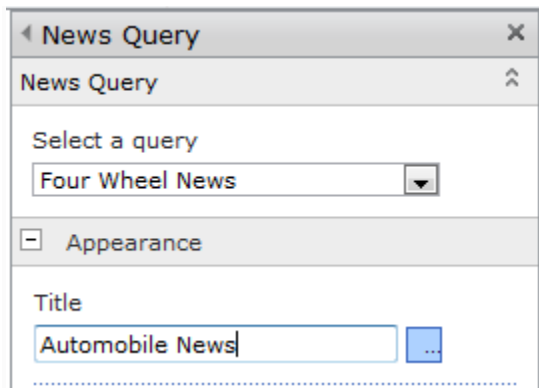
The two options in the NewsGator portion of the settings control the display view and the number of articles to show.
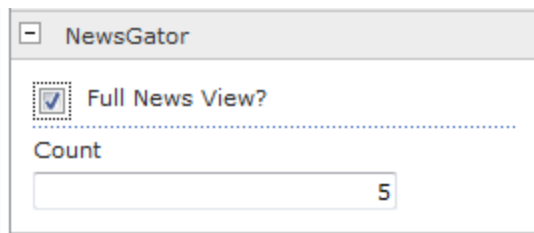
When the Full News View option is selected, the source and time of publishing will display.
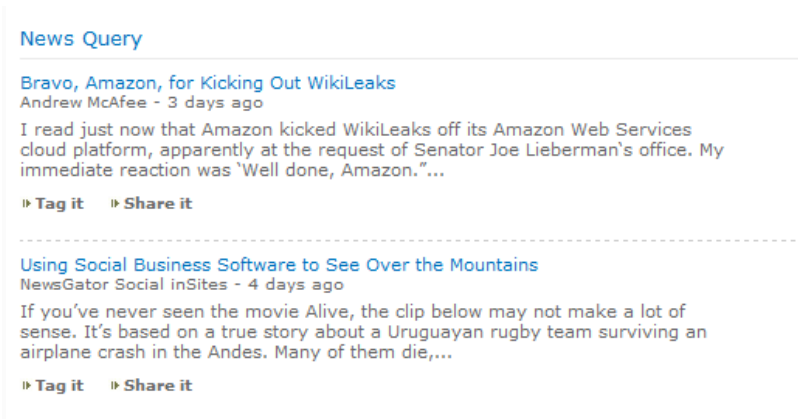
Without this option, the display is slightly smaller.

News Query

Bravo, Amazon, for Kicking Out WikiLeaks
I read just now that Amazon kicked WikiLeaks off its Amazon Web Services cloud platform, apparently at the request of Senator Joe Lieberman's office. My immediate reaction was 'Well done, Amazon."...

▷ Tag it   ▷ Share it
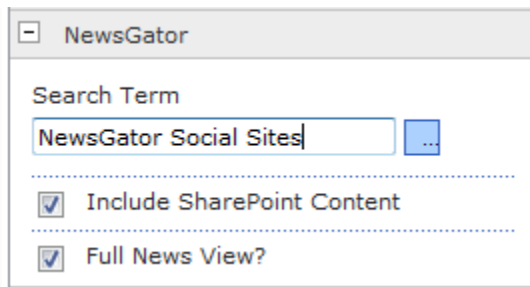
Using Social Business Software to See Over the Mountains
If you've never seen the movie Alive, the clip below may not make a lot of sense. It's based on a true story about a Uruguayan rugby team surviving an airplane crash in the Andes. Many of them die,...

▷ Tag it   ▷ Share it

News Search Web Part

This web part performs a query at the moment the user views it. The site owner can configure a search string as well as deciding if the SharePoint search results should be included.

If the "Include SharePoint Content" box is checked, SharePoint search will be used (including trimming for the viewing user) to provide results which will be intermingled with matching articles from the RSS feeds being retrieved by the News Stream module. The screenshot below illustrates this with one RSS article followed by two SharePoint results.

News Subscriptions Web Part

This web part shows the articles from the feeds a user has in their personal subscriptions. This is especially helpful for users who want a persistent view of all their most recent articles. (This web part only makes sense to deploy if you have or have had both the **Enable News Activities** the **Allow Personal Subscriptions** system options turned on – see the **Managed Service Settings** section above.)

There are two configuration settings provided in the NewsGator section when editing this web part.

Count determines the number of articles to show.

When the **Full News View** option is selected, the source and time of publishing will display. Without this option, the display is slightly smaller.

Viewing News Events in the Activity Stream

In addition to seeing news events in the web parts above, users can get alerts in their streams of new News Stream articles. Alerts appear in both the main My NewsFeed filter and in a filter dedicated to just news alerts called My News Interests.
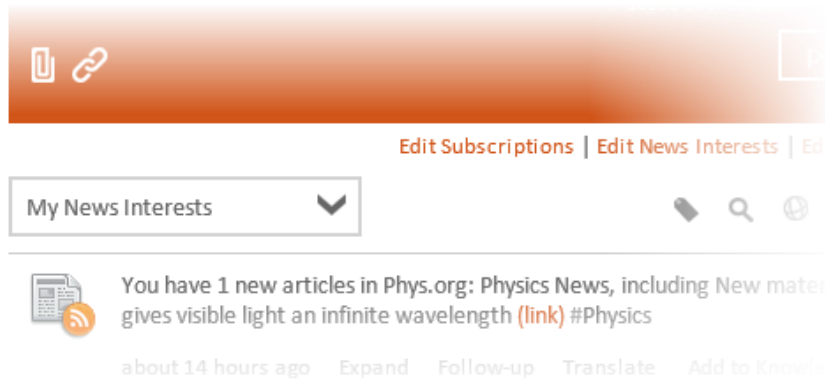
There are two kinds of alerts that users can get this way. One is for new articles in one of the user's personal subscriptions (including personal subscriptions assigned to the user by an admin). The other is for articles from the system feed collection that match one of the user's declared news interests keywords.

If the **Enable News Activities** setting is turned on (see the **Allowing or disallowing personalization** section below), users will be able to get these alerts with links to articles that interest them in their newsfeeds, and will be able to add and manage their news interests (keywords). If the **Allow Personal Subscriptions** option is also turned on, they can additionally customize by adding personal subscriptions to any feeds, be they system feeds or not. Note that this setting being off does not prevent a system administrator from assigning the user a personal subscription, as described in the section **Pushing personal subscriptions** above.

News events by digest email and smart phone clients

If allowed to access the page for setting up news interests, users also have options for getting email digests at a specified frequency containing the same artlcle links they see in their streams. And because the news events are part of the Activity Stream, NewsGator mobile clients like the iPhone and iPad Sitrion Social clients can display them. See the **Sitrion Social v5.5 User Guide with Web Part Summary** for more information on these user options.

☞	FIND MORE INFORMATION: Sitrion Social v5.5 User Guide with Web Part Summary

Personal feed integrations with external accounts

If allowed to set up personal subscriptions (see the **Allowing or disallowing personalization** section below), users that have an account on Twitter, Yammer, SalesForce Chatter, or Dynamics CRM can subscribe to their feed in that account, and so see items from those social streams within Sitrion Social. Additionally, most of these go beyond being simply a passive display of those streams, allowing users options for interacting with the posts that come in, and having those interactions reflected back on the external system.

The following subsections provide any administrative steps that are necessary before users can integrate with these external accounts, and review what integration functionality each one has.

☞	FIND MORE INFORMATION: See the **Sitrion Social v5.5 User Guide with Web Part Summary** for details on steps users must take to integrate their external accounts with News Stream.

Salesforce Chatter integration

Unless you plan to use single-signon with Salesforce Chatter, there are no administrative steps necessary before users can integrate with their Salesforce Chatter feeds. Single-signon support for Salesforce Chatter integration was added in version 3.5 of the News Stream module for Sitrion Social. This optional feature, however, needs validation in each customer environment before production deployment. If you are planning to use single-signon with Chatter, please contact NewsGator Support for specific guidance.

Chatter is a capability in the Salesforce product to have an activity stream around people or objects in Salesforce that users choose to follow. Once a user has integrated their Salesforce Chatter account into Sitrion Social, they are able to view and also comment on their Salesforce Chatter feed items from the Sitrion Social activity stream (that is to say, the comments they make in Sitrion Social are copied back into Salesforce Chatter).
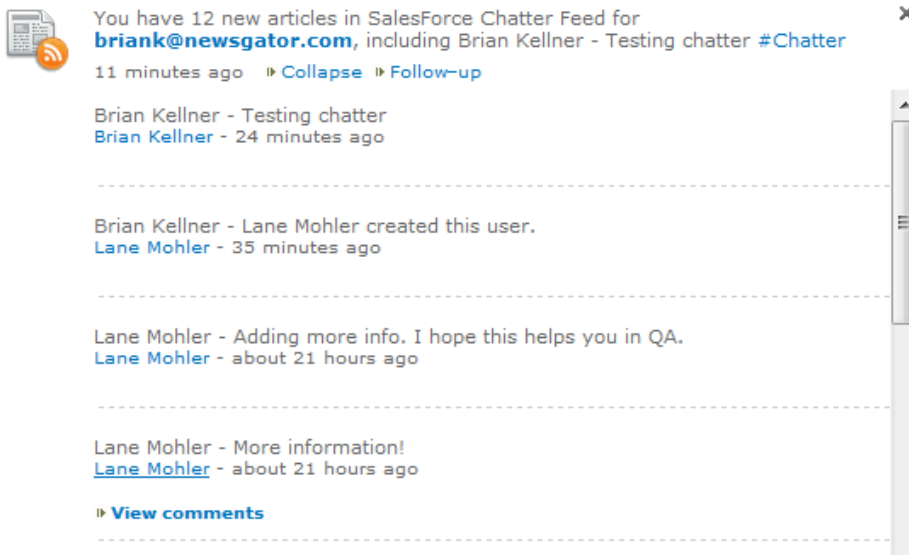
Yammer feed integration

There are no administrative steps necessary before user can integrate with their Yammer feeds.
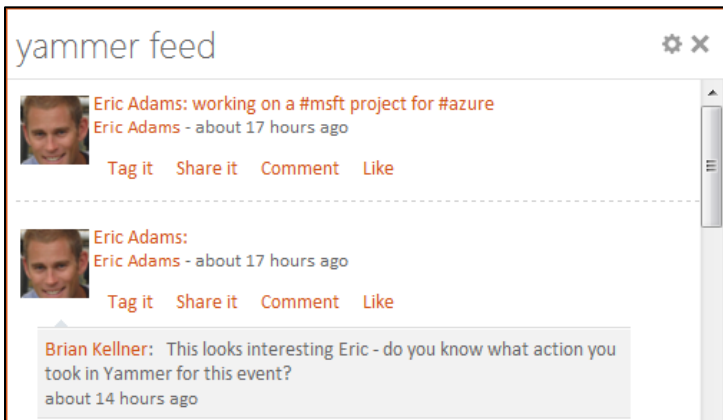
Once a user has integrated their Yammer account, they are able to comment on, like, tag, and share their Yammer feed items from the Sitrion Social activity stream. Entering a comment is very similar to a normal Sitrion Social comment however @ targeting and auto-completion of hashtags after typing # are not supported.

Dynamics CRM Integration

Starting in the R7 release, the Microsoft Dynamics CRM product has had a social feed. Inside CRM, users see this view in the What's New screen.

News Stream allows a user to pull this feed into Sitrion Social. From Sitrion Social, users can tag or share items and also comment on them. Comments added to CRM activity stream items in Sitrion Social are automatically copied into CRM so that users in CRM can see those comments as well.

CRM integration must be enabled by an administrator before users will see the option to integrate their Dynamics CRM feeds into Sitrion Social. It is enabled and configured in Central Administration, in the NewsGator News Stream Services management page.

If Dynamics CRM integration enabled is checked, end users will have the Dynamics choice from their Edit Subscriptions menu. Server name should be what will resolve for an http request from the SharePoint server – you may need to use the fully qualified domain name. Enter the port number on which the Dynamics server is accepting http requests. Finally, check the SSL box if an https connection is needed.

Once these settings are completed, use the Username and Password entry boxes with the Test button to ensure they have been done correctly.

Twitter feed integration

There are no administrative steps necessary before user can integrate with their Twitter feeds.

Once a user has integrated their Twitter account, they are able to tag and share their Twitter feed items within the Sitrion Social activity stream.

Allowing or disallowing personalization

Administrators can maintain complete control over what feed content gets into the system by not allowing direct user subscriptions. Unchecking the **Enable News Activities** setting will remove both the options for stream display of articles, either by keyword matching or by direct subscription. To eliminate just the direct subscriptions option, the **Allow Personal Subscriptions** option should be unchecked.

There are different levels to which users can be allowed to customize what articles and feeds they consume. They can be allowed no customization; they can be allowed to specify personal keywords that bring them matching articles from the system feed collection; and they can be allowed both this and the ability to create personal subscriptions to any feed. The settings that control these options are in the NewsGator News Stream Service Application's management page, in the News Activity Settings section and the Content Management section:

With both boxes checked (both **Enable News Activities** and **Allow personal subscriptions**), users will see two links in their Activity Stream web parts, "Edit Subscriptions" and "Edit News Interests". These links are equivalent to selecting the "Subscriptions" and "News" tabs of the Settings dialog, respectively.

Using the Edit Subscriptions link (or the Subscriptions tab), users are able to personally subscribe to any feeds (whether in the system or not), and have synopses of articles from these feeds appear in their activity stream.

Using the Edit News Interests link (or the News tab), users are able to enter a list of keywords that will be matched to articles in the system feeds collection, and have synopses of these articles appear in their activity stream.

	FIND MORE INFORMATION: See the **Sitrion Social v5.5 User Guide with Web Part Summary** for information on how users can use these options subscription and keyword search options.

If in the Content Management section of the management page you uncheck the "Allow personal subscriptions" box and then click "Save", people will no longer see the Edit Subscriptions option (nor the Subscriptions tab in the Settings dialog), and will therefore no longer be able to personally subscribe to newsfeeds:

Note: this setting is cached on front-end servers, so if you disable it after users have seen this link, they will continue to see the link for some time, until the cache is refreshed.

If in the News Activity Settings section of the News Stream management page you uncheck the "Enable News Activities" box and then click "Save", people will no longer see either option (regardless of what the Allow Personal Subscriptions setting is). Nor will either of the News or Subscriptions tabs appear in the Settings dialog. They will therefore no longer be able to enter keywords as news interests that will bring synopses of matching stories into the Activity Stream.
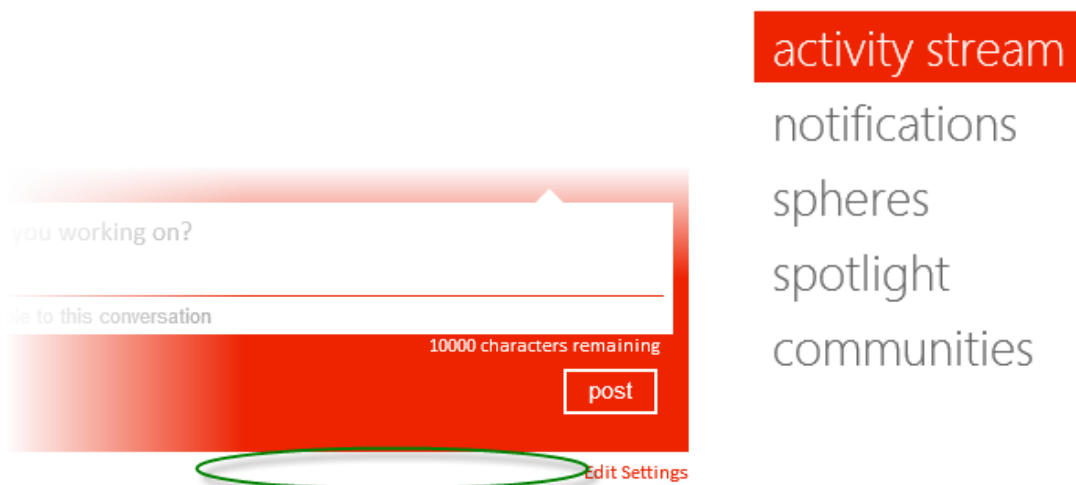
Sitrion Social Internal Communications Solution

Overview

This admin guide is in support of the configuration and rollout of the Internal Communications Solution. Steps for technical configuration are provided along with best practice considerations for best leveraging the capabilities to target internal messaging to employees.

There are several topics covered in this document, from creating the service application, to more detail on how to implement the landing page, including guidance on leveraging web parts and customization to meet organizational requirements. Next, having the supporting community channels is a tenet of effective communication, so key considerations for their setup and configuration will be covered. Further, tile sets are needed to provide a filtered view for sanctioned organizational communications. While you could roll out the bare minimum amount of configuration for the internal communications tile, we'll cover some best practices and considerations which should be taken into account when implementing this core feature. Lastly, we'll walk through the administrative console which will be used by communications managers.

Creating the Service Application

As of 4.1, the service application should be created by the installer. Should you ever need to manually create the service application, log into SharePoint Central Administration and navigate to **Application Management > Manage Service Applications**. Click the **New** button, and select **NewsGator Internal Communications Service**.
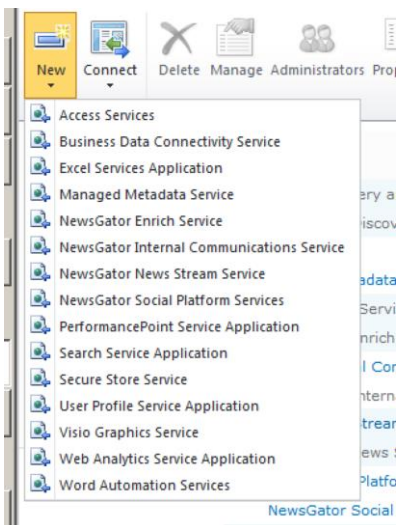
Configure the application pool and click **Ok**.
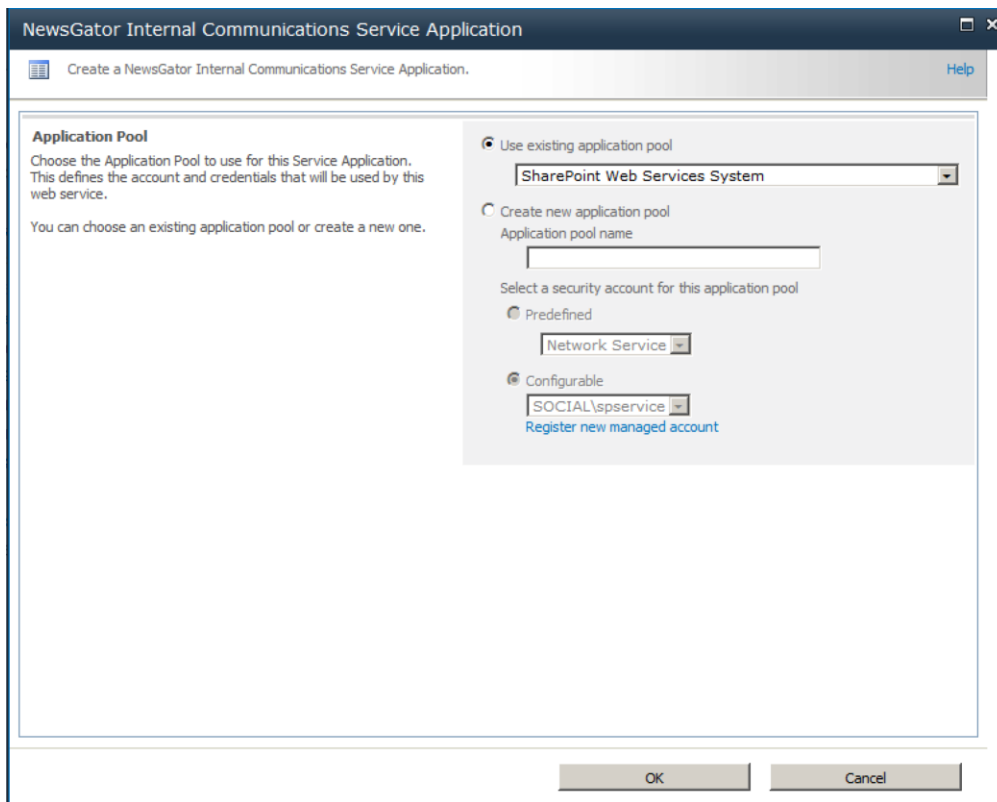
Verify the service application was created:

Note: This service application needs to be in a named proxy group (custom won't work). It's best to leave it in the default proxy zone. This app has to be in the same proxy group as the Sitrion Social core service application.

Landing Page

This page is intended to replace the SharePoint newsfeed page, in that this should be the primary place for most users to interact with the stream. The key capability that the narrow stream provides is tracking of "views". A view is logged anytime a user clicks on an item from the narrow stream on the Internal Communications landing page or in lookout, clicking lookout 360 notifications, opening the view link in an email notification, by clicking to expand comments in a community, or clicking on an individual item in the native mobile clients. The old stream, generally placed on the newsfeed page, does not track views – which is a compelling reason to retire it if it's currently being used.

There are several options for removing the My Newsfeed links from SharePoint navigation if you should wish to not use it any longer. You can disable the SocialRibbonControl feature or remove them using jQuery. Each approach has it's considerations, and this document will not cover them as this is a function os SharePoint. Consult with NewsGator Professional Services to provide recommendations based on your organizations requirements.

Deployment

Navigate to the site collection where the landing page will be deployed. Go to **Site Settings > Site Collection Features**. Activate the **NewsGator Internal Communications Site Collection Home Page** feature.

Note: the landing page will not show any content in the image carousel web part until images have been uploaded to the picture library (this is provisioned in the root of the site collection as part of this feature activation). The blog roll-up web part, similarly, requires configuration and content in the respective blogs for it to be visible on the page.

The feature which deploys the landing page automatically sets it as the current site collections landing page. Should this solution be deployed to an existing site collection, you may consider re-setting the previous home page until you are ready to roll it out. Before activating the feature, make sure to make note of the location of the current home page. You can do so by manually reset the home page by navigating to the old page, clicking the **page** tab in the ribbon, and clicking the **Make Homepage** button.
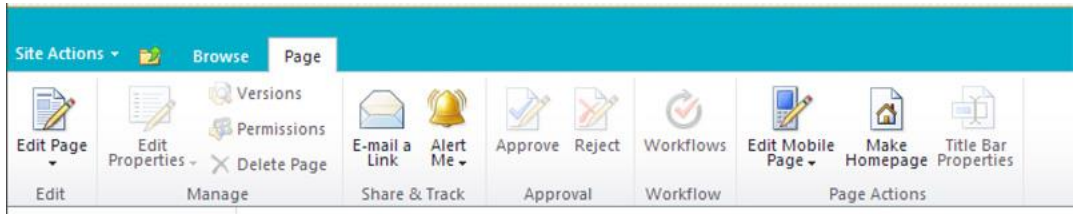
Perform the same operation on the Internal Communications home.aspx page when you're ready for roll out.

Lastly, multiple versions of the landing page can be deployed in a single environment, which can be useful in geographically dispersed environments.
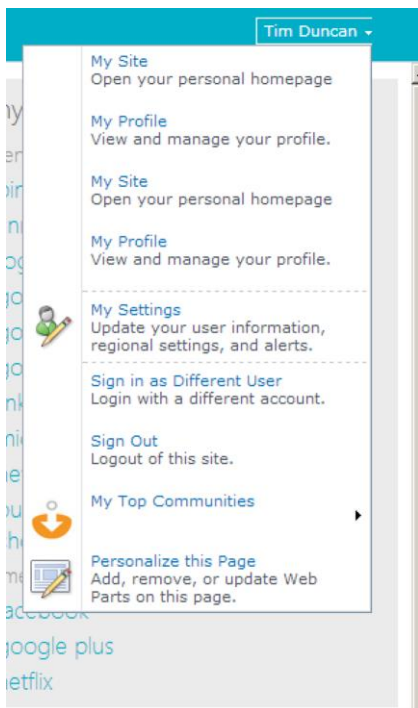
Managing Impact and Reach On Your Posts

Communications managers will need to use the tools provided by this solution to help manage the impact and reach of their messaging. While the reach metric will never be 100% accurate in terms of passive interaction with stream content, it should be used as a general indicator of impact of corporate messaging. Some notes on best practice on how to leverage the solution:

- The narrow stream truncates a post after ~280 characters. In order to see the whole message, a user must click on the stream item. To encourage interaction, it may be a good idea to write posts which exceed the character limit. This is given that the content which is displayed, is compelling to the audience.

- Use the view, comment, and like metrics in the administrative console to understand at what times your messages are getting the best reach. Experiment with times just before or after work begins, or right after designated break times (i.e. lunch), for example.

- Leverage promoted posts only for critical messaging, and try not to set the expiration time too far from the post date. If promoted posts are used too frequently, employees can become desensitized to their appearance.

- Make your posts relevant. By having specific groups you can target messages to, you increase the ability to provide highly relevant content to your employees. You may want to keep more global messages for the blog and image rotator web parts, and use the Internal Communications Tile for more targeted messaging.

- Links in your post may encourage click throughs

The key approach is to experiment and monitor which posts get the most views, likes, and comments. By using the reach metrics provided in this solution, you should be able to get a better understanding of what works for your organization.

Customization

The only element that is fixed on the provided landing page is the narrow stream on the left side of the page. All other content provided is provided by web parts. While NewsGator does provide default web parts, it is entirely customizable (just like any other SharePoint web part page). The "recommended" web parts are great for initial roll-outs, but may lose their appeal in a more mature environment. With the assistance of NewsGator services, we can provide a thorough recommendation for capabilities that align with your business requirements and needs.

Additionally, the page may be branded in accordance with SharePoint best practices. Web part chrome, the SharePoint ribbon, and other normal branding considerations still apply like any other SharePoint environment. That said, branding is not necessary and the page may be used with the default SharePoint v4.master, for example.

Image Carousel Web Part

When the **NewsGator Internal Communications Site Collection Home Page** feature is activated, in addition to adding the landing page, an image library is provisioned at the site collection root aptly titled **Internal Communications Home Page Carousel Images**.

NewsGator recommends using images which are 1000px wide and 350px tall, though any size can work. The key requirement is keeping all images the same size. When uploading multiple images to the image library, you will want to set the image count to the max number of images you wish to display by editing the page, clicking the web part drop-down and selecting **Edit Web Part**. Expand the NewsGator section in the editor part and set the count and click the **apply** button. Images are sorted by upload date descending, so newer images show up first.

Two optional fields are available for all images. **Title**, which adds white text with a translucent black background along the bottom of the image, and the ability to hyperlink the image with the **Carousel Link** field.

Blog Roll-Up Web Part

Please refer to the core Sitrion Social administration guide for the setup and configuration of this web part.

Community & Colleague Recommendation Web Parts

These two web parts use the same recommendation engine as in other parts of the core Sitrion Social product. They are great for new deployments, but not as recommended in more mature environments since the recommendations tend to become less relevant as people may already follow many communities and colleagues.

Other Considerations

- It's not recommended to add the landing page to the My Site host. NewsGator generally recommends using a blank site template.

Targeting

One of the biggest value adds of this solution over a traditional intranet landing page, is the communications manager's ability to better target messages to groups of employees within the organization. The following recommendations explain how best to leverage the Internal Communications Solution to that end.

Communities and Spheres

For organizations that have an existing deployment of Sitrion Social, you can certainly leverage existing communities for the purpose of messaging employees using this solution. To fully benefit from these new capabilities however, NewsGator recommends that new communities be created to provide key channels of communication for segments of your employees. The purpose is so that communications managers can better control membership of the communities for messaging. You wouldn't let end users decide today what key email distribution lists they are part of for important communications; the same holds true for this solution. For this reason, it's recommended that these new communities be configured using SharePoint audiences to control membership and disabling the follow controls. Onboarding and back office HR processes should be updated to ensure employees are always subscribed to the right communities.

Refer to the Sitrion Social Admin Guide for details on how to use SharePoint Audiences to manage a community's membership.

The following are considerations when setting up these communities/spheres:

Community Vs. Sphere

The main consideration for spheres versus communities is in regards to two things:

- Do you want to keep it admin only for posting messages
- Do you need to store attachments

The biggest implication for point one, is that if you create the group as ready only, spheres can only have one admin with the ability to post. With regards to attaching content (images, docs, etc.), attachments posted to the stream on private spheres winds up in a publicly accessible document library. While the first release of Internal Communications Solution doesn't support attachments from the admin console, the capability is intended to appear in a near release.

Public Vs. Private Security

The key thing to understand for public versus private groups, is whether messages in the group in question should be seen by people who are not members. If it's a group for management, the answer is likely no. If the group is more

casual or open in nature, public is best. Public is recommended for most groups simply because you should not target a private community and a public community (this makes the post public). If you have a large amount of private communities, you could wind up having to create many instances of the same message, which will make it more difficult to manage.

Private communities should never grow to more thank 5k users as this is not scalable per SharePoint software boundaries.

Title

The title should, as clearly as possible, let the members know the purpose of the group. Providing a more creative title is ok as long as it's easy to understand derive why you are part of the community being targeted.

Read Only

Setting a group read only means that only the group owner can post to the community. Since the person tile can now filter by communities you are a member of (a key configuration when setting up the Internal Communications Tile), it's ok to give others the ability to post to official communities. It won't flood the official tile with noise because of how the tile is setup.

Keep in mind that spheres can have only one owner, so making it read only means that only one user will have the ability to post. Additionally, read only does not mean that users cannot comment, like, etc. You will need to lock the post in order to prevent commenting.

Disable Follower Controls

It is highly recommended that you disable the ability to follow/leave a group that will be used for corp comm messaging. Membership should be handled by the syncing of audiences only so that messaging is guaranteed to go to the right employees.

Discoverability

Discoverability should be turned off unless users are allowed to follow the group without being in the correlating audience. This prevents these communities and spheres from crowding the other groups in Sitrion Social community discovery web parts.

Targeting with Blogs

The blog roll-up web part will security trim the aggregated blogs, effectively allowing system admins to provide relevant content to users based on how permissions are configured on your blog posts. This, of course, requires the appropriate AD groups to be configured and applied to the respective blogs.

Additional Considerations

- If the intent is to create a community as read only (i.e. only admins can post), the community should be created by the corporate persona account. This is the same account which is configured in the admin console settings. While site collection admins and users with full control can post directly to an admin only community, a limitation in the API only allows for the creator of the community to post. A workaround would be to set the IsOwner flag to 1 in the SocialGroupMembership table. Please consult NewsGator before manually changing database values.

Tile Sets

It is recommended that you familiarize yourself with the tile set capability in the existing Sitrion Social documentation (Sitrion Social v4.0 Administration Guide) prior to reading this section of the admin guide.

The most basic implementation of the Internal Communications Solution would include a single tile set for the entire organization, and would contain a single "Internal Communications" tile configured. While this is all that is needed from a technical perspective, it is highly recommended that organizations consider providing, at a minimum, 3-4 other default tiles. To get the biggest benefit, you may consider assigning relevant tiles to employees based on their role, geography, or department for example. Because every user can only have a single tile set assigned, it can become an exercise in change management to make significant changes to how your tile sets are configured and rolled out after the fact.

The most common ways to roll out tile sets is either by department, geography, or role. Any other dimensions are entirely possible, the key configuration to consider is having the appropriate SharePoint audiences to drive the assignment of tiles. Additionally, you will want to ensure that the approach taken does not have employees falling into more than one audience as every user can only have one tile set at a given time.

Because the tile set assigned to a user replaces what default tiles they get, there are some basic tiles that should be assigned in addition to the Internal Communications tile. NewsGator recommends the following tiles:

- Profile Setup
- Recommendations (if the landing page does not have this already)
- Communities – if rolling out one tile set to the org, communities chosen should be wide in scope and purpose (i.e. the user base should be something applicable to everyone in an organization. If rolling out to more specific groups, like by department or role, the communities chosen can be more specific to those groups. This makes for a great on-boarding story for new employees.
- Person Tile – this can be used to highlight posts from leadership (CEO, departmental managers, etc.)

Internal Communications Tile

When configuring the Internal Communications Tile in your tile sets, you'll want to check the **Lock This Tile** setting in the configuration screen. This prevents users from being able to delete this tile from their activity stream.
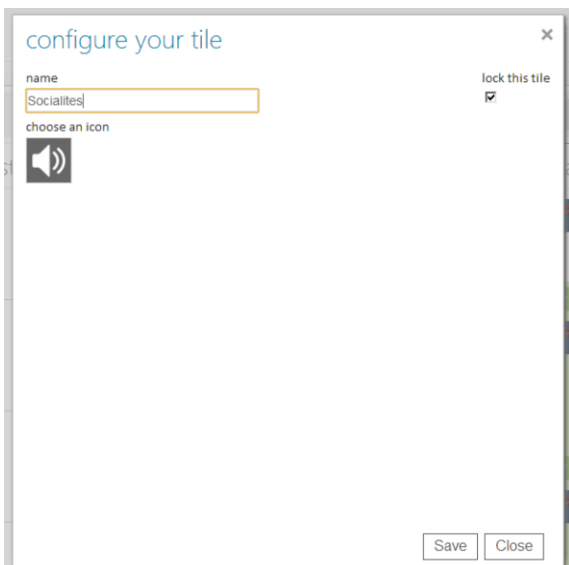

Best Practices

- You will want to name your tile with something that is straight forward, and easy to understand. Users should be able to glean that this is the company channel. NewsGator suggests using something aligned with corporate culture, company vernacular, etc.
- Keep the name short enough that it does not cause issues in the narrow interface

Internal Communications Console

The Internal Communications Console is the backend administration interface which communications managers will use to schedule and manage official messaging from your organization. Read permissions are the minimum rights required in order to use the console.

Creating the Admin Console

Log into SharePoint Central Administration and navigate to **Application Management > Create Site Collections**. The site collection can live anywhere, so make sure you select the right web application and managed path according to your site architecture. Enter a title for the site and, in the templates page, select the **NewsGator** tab > **NewsGator Internal Communications Administration** template.
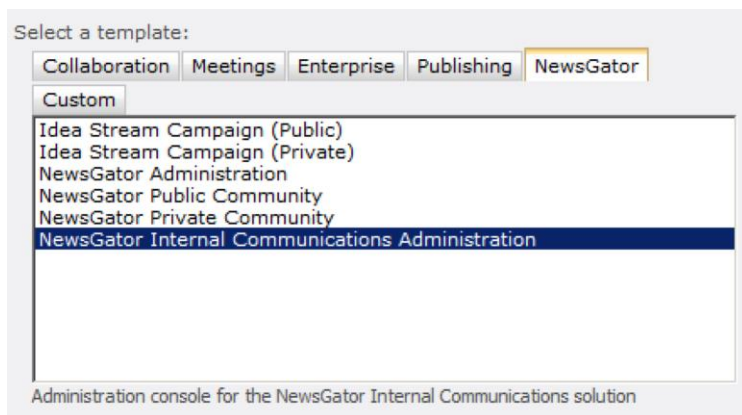
Set a site collection administrator and click **Ok**.

Navigate to the site collection once it's done provisioning, and select the settings tab (of the four tabs, it has the gear icon):
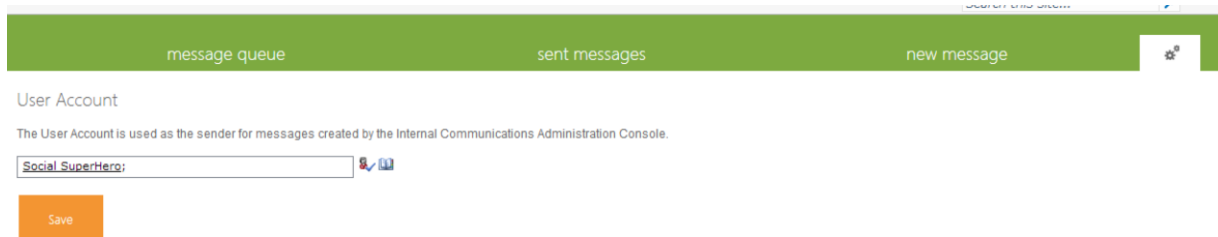
Enter the persona account which will be used to publish messages through the console and click **Save**.

Persona Account

The persona account is the user which is setup with the intent of it showing up as the author for all messages being sent from the console. This account should not be a general user of the system, and should be setup expressly for the intent of publishing all corporate messaging in the stream.

Note: this account will have to be added as a member to all communities you'd like to be able to target from the console. For admin only communities, this account has to be used to setup the community (this makes the account an owner of the community, a key requirement for posting from the admin console).

Note: Starting in the 5.0 release, you can select which accounts are targetable without having to login as the persona account and follow each community or sphere. On the Settings page, there is a search interface for configuring.

Search for communities/spheres

Following and unfollowing communities/spheres will affect the user account's membership only and will not affect your own memberships.

Other Recommendations:

- The user display name should not be a normal name (i.e. John, Mary, etc.) simply because it can be confusing to end users who the person is. NewsGator recommends that organizations use either their company name, or something that will be easily recognizable as corporate personality.
- A profile picture should be setup for this account in SharePoint. A corporate logo or mascot work great here.
- Add a description in this account's SharePoint profile to help users understand what the account is for.

New Message Page

The new message page is where communications managers will be composing and targeting messages through the console to employee's Internal Communications Tile.

Users have two options now for who shows as the other of posts created from the console. By checking the **display my name as the author** check-box, the post will show up as the currently logged in user. If you do not check this box, the persona account will show as the author.
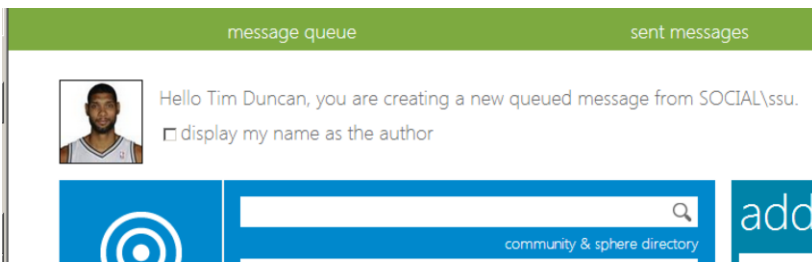

The target control is where communities can be targeted from for the new message. While you can also @ target from the message box, only communities added to the target box will count for the reach metrics (i.e. the potential distinct viewers of the message).

As you type into the search box, communities for the currently logged in user will appear as auto-complete options. Hitting tab, enter, or clicking a suggestion with the mouse pointer will add the community to the box below. Many communities can be added for each post. If needed, click the **X** next to the community name to remove it.


To get a list of all communities available for targeting, click the **community & sphere directory** link. This brings up a list of all public communities, as well as private communities the currently logged in user has access to. Communities can be added to the target list by clicking the "**+**" button, and removed by clicking the "**-**" button.
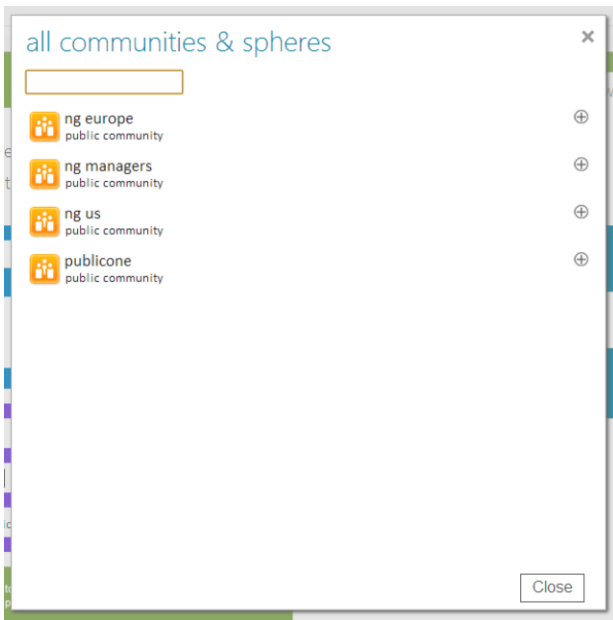
Keep in mind that it is not recommended to target both private and public communities in the same message. This effectively makes the post completely public, and also displays the private community's title in the message itself. A warning will be displayed if this is attempted. If enforce privacy is enabled in the Social Sites Service application, this could cause an error to be thrown by the backend timer job in charge of posting queued messages. If this occurs, delete the post from the Message Queue Page.
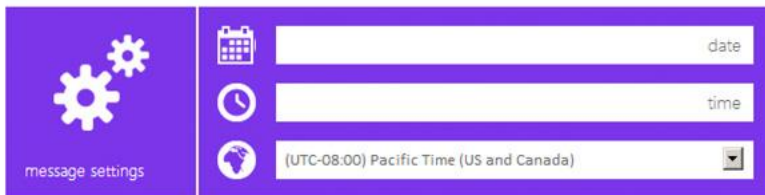
The message settings control contains three required fields. A date, time, and time zone must be selected for every message. Also make note that the default frequency for the **NewsGator Internal Communications Queue Message Processor Job** runs every 15 minutes. If you frequently find you need more granularity on how soon/frequent posts need to be sent, you can reconfigure this job to run at shorter intervals.
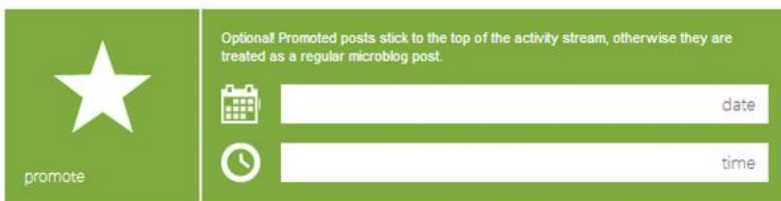

The promoted post fields are entirely optional. The date and time must be later than the date/time entered into the message settings control. It is recommended that most posts not be promoted, and this capability is reserved for messages of high importance. If this is used too often, it can desensitize users to the appearance of promoted items in the stream.

Promoted posts will appear with a green background and will have a "Promoted" banner at the top of the stream item.

Clicking the "X" in the promoted banner will mute the post for the currently logged in user.
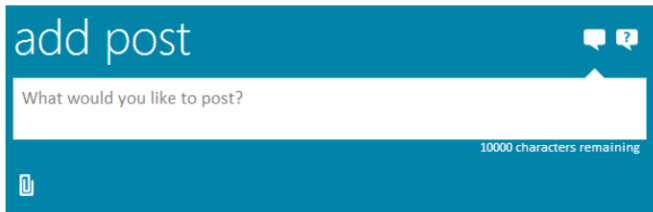
You may either post a microblog from the message box, or you may also choose to ask a question. Polls are optional for questions by clicking the poll button that appears once you've selected the question post type. Enter your message into the message box. Optionally, you may attach a file (document, image, etc.) as part of the post. This attachment will live in the currently logged in user's public documents folder on their My Site (my content). A warning will appear in the post box should any private communities be targeted when attaching a file (as the file itself will be publicly accessible) Once you are done entering your message, click the **Save to Queue** button. If all required fields are provided, a message will display confirming that it was added to the queue.

Additional Notes

- If you want to send the same message to multiple time zones, you will need to enter the message once for each time zone. Likewise for posts that should be in multiple languages.

Message Queue Page

The Message Queue Page shows all messages which are pending delivery, listed in chronological order (the next post to go out will be the top item). Messages can be deleted from the queue by clicking the **Delete** button.

Sent Messages Page

The sent messages page is for viewing the metrics for sent messages. Sent messages appear chronologically, with the most recently posted appearing at the top. Clicking on any of these will bring up the related metrics on the right side of the interface. Here you can see unique likes and comments (the numbers at the top), and the current total number of likes, comments, views plotted over time. Potential viewers are the total number of unique users the message was sent to when the post was made (this number will not go up for people or communities targeted in comments).

Keep in mind that all metrics are brought back from the reporting database, which are dependent on the timer job, **NewsGator Reporting Database Load Job**. The default frequency is once an hour for loading reports. Should you want a higher frequency of updates, change the frequency of this timer job in central administration.

NOTE: In later releases, the "impressions" metric was added to this page. Each time a post appears in the top five posts of a user's stream, the impression count is incremented.
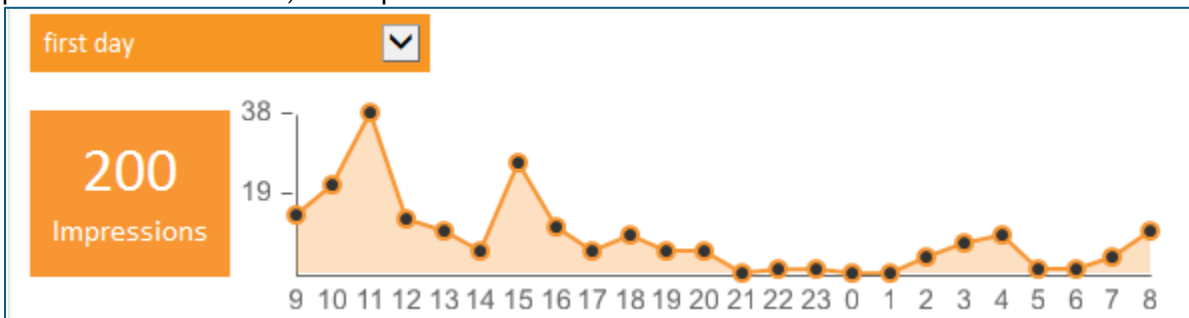
Posts may be deleted from this interface as well by clicking the **delete post** button in the top right of the interface.

Internal Communications "iComm" Enhancements

Townhall Meeting

NOTE: This functionality requires the 5.3 Sitrion Social and 5.3 Internal Communications solution (or later versions).
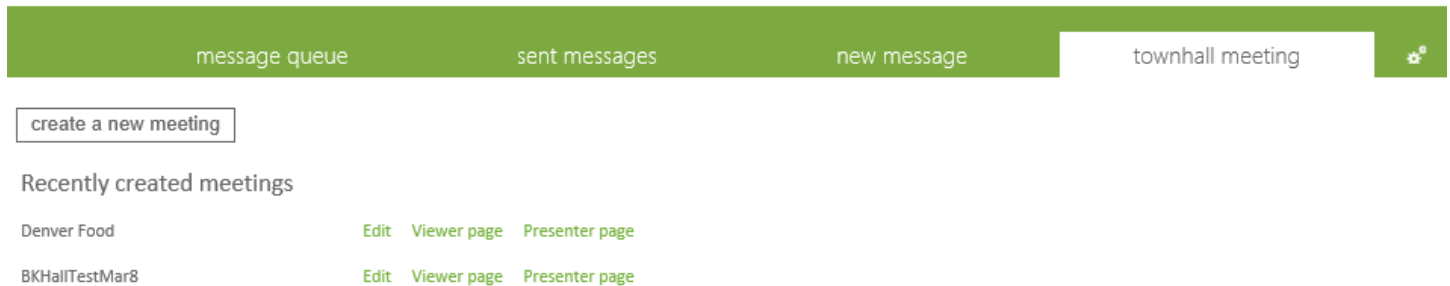
Over the years, several companies have found that one of the most compelling use cases for social was live events where leaders or experts posted and reacted to questions in the stream while a live audience viewed and interacted. The default activity stream in Sitrion Social is optimized around providing a rich viewing experience, and it is often placed on pages that have a lot of content. Correspondingly, live events can place a much larger load on the platform than what it is typically sized to handle for steady-state usage. Because of this Sitrion has historically guided customers away from this use case or encouraged lots of testing and focusing on smaller-scale conversations. The Townhall Meeting feature is designed to give companies an interface and backend that will perform well with larger audiences as well as providing some specific tools to configure and run these sessions well.

A Townhall Meeting happens on a lightweight meeting page that can be configured by non-technical staff without need for SharePoint permissions. The iComm Solution provides central management for defining and viewing these meetings, but community owners can also create these meetings independently for their community.

An existing community will be used as the "home" for the stream and the content. This will keep the benefits of having the posts in the stream and a logical place to store content. The meeting administrator will configure a townhall meeting page (detailed below) and publicize the link to that page.

When the meeting happens, users will participate on a lightweight page and the meeting administrators and speakers will have a separate meeting management page. If a user attempts to visit the community page while a townhall meeting is running, she will be redirected to the lightweight page.

For an iComm administrator, creating or editings a meeting is done from the Townhall Meeting tab in the iComm admin page.

message queue	sent messages	new message	townhall meeting	⚙

create a new meeting

Recently created meetings

Denver Food   Edit   Viewer page   Presenter page

BKHallTestMar8   Edit   Viewer page   Presenter page

Public community owners can create Townhall Meetings for their communities the Admin tab view the Manage Meetings link. This gives community owners the same create and edit options as are available in the iComm administration UI.

- Social List Settings
- Edit Classifications and Interests
- Email Members
- Question and Answer Reports
- Community Engagement Scorecard
- Configure Audience Targeting for Tabs
- ● Manage Meetings

Selecting the "create a new meeting" option presents a dialog box.

The required section includes entering a title and description for the meeting as well as selecting a group (community or sphere) to which the meeting is tied. The conversation from this meeting will be visible in this community or sphere after the meeting has ended.

The presenters section allows you to choose the people who will have access to the presenter page.

The presenter checkbox indicates a person whose picture can be shown on the viewer page.

In the "options" section, the "show presenter pictures" choice will cause thumbnail of each checked presenter in the "required" section to be displayed on the viewer page. This gives viewers a visual of the people who are the formal hosts of the event and gives them a way to see the profiles for the presenters.

The "question submit box" option creates a channel for viewers to send question privately to the presenters. You might want to enable this in a case where you either want to allow viewers the opportunity to ask a question without it appearing in the stream for everyone if you feel like this will make people more open to asking. You might also want to use this if you do not want meeting participants to post questions directly the stream – you may want the presenters to have the opportunity to review and maybe rephrase or consolidate questions before answering.

The "allow viewers to post to stream" section determines whether the meeting participants can initiate new posts in the stream. In some cases, you may want the presenters to be the only people creating the initial posts or questions. You can also control whether viewers can attach files (enabling this only makes sense if either microblogs or questions are enabled).

"Display most recent comments in stream" affects how posts appear in the stream. With this setting enabled, posts include most recent comments when a user views the stream. With this off, only text from the post itself displays and users have to click into the detailed view to see text from comments.

"# posts to display" controls the length of the stream. If you specify a "refresh stream interval", the stream will automatically update on the viewer's screen at that pace. Viewers can pause this behavior. The fastest you can set is 10 seconds. If you use this feature, it's good to experiment with the pace of updating to see what works well for users and load on the system. You may want to start with something like a 30-second update frequency and adjust from there.

The "preset hashtag" option helps if you want a whole meeting to have the same hashtag in every post.

Start and end date and times are used for redirecting users who are visiting the community during the time of the meeting to send them to the lightweight townhall meeting page.

The "related links" section allows you to specify links that viewers may find helpful during the meeting. For example, if the meeting is talking about a product release, you might provide links to a product collateral and documentation.

You can change the settings for a meeting at any time. If you change the settings during a meeting, users will need to reload the page to be able to see the results.

Below is an example of fully defined meeting.

edit meeting ✕

required

title
Denver Food

description
Share your questions and thought

group
Denver Food Townhall

presenters
[   ]

name	presenter?	
sherstin lauman	☑	X
brian kellner	☑	X
isabelle szucs	☑	X

options

☑ show presenter pictures?
☑ question submit box?
☑ allow viewers to post to stream?
  ☑ microblogs
  ☑ questions
  ☑ file attachments
☐ display most recent comments in stream?

 # posts to display?
25

refresh stream interval (in seconds, minimum = 10)
10

preset hashtag in post box?
[   ]

start date
03/09/2016 02:00pm
end date
03/09/2016 02:30pm

[clear dates]

[change date]

☑ show related links?

name	url
Financial Info	http://www.google.com
Recent Surveys	http://www.microsoft.com

[save] [cancel]

With these settings, the Viewer's page looks like this.

The main stream is on the left side. Because viewers are allowed to post, there is a post box on the right. The related links, questions box, and presenter's pictures settings are also turned on, so those sections show on the right as well.

When a viewer clicks on stream item (a poll in the example below), a pop up view of that item with all the text and comments is displayed.
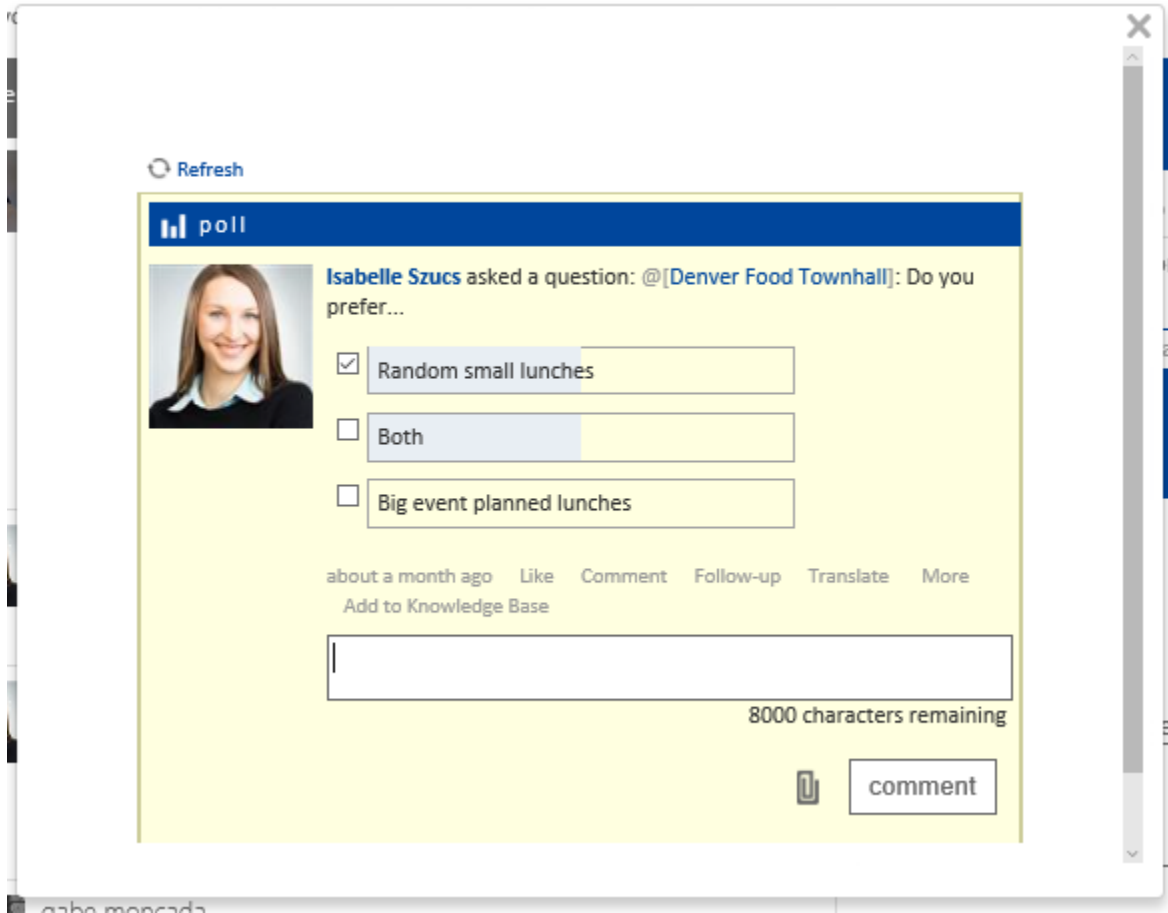
Viewers who want to follow a particular thread of the conversation can keep this view open and just click refresh to see the latest updates.

The presenter page is similar to the viewers page.

Presenters will always have a post box available even if viewers do not. If the "questions box" is enabled for viewers, the presenters get a list of all the submitted questions on the right. A link lets the presenter easily copy the question to the post box for editing (e.g. "Brian asks – demo question") and posting to the whole meeting. The "mark as answered" link lets presenters keep track of questions which have been closed out.

From the presenter page, there is also a link to the "view post-event summary" page detailed below. Clicking this link prompts for the start and end time for your report.

The summary page provides reports on how the event transpired. By showing posts (microblogs and questions), replies (comments and answers), likes and meeting questions (if the question box is enabled) over time, it gives presenters an understanding of both the level of activity and how that flowed over the course of the meeting. The shows the total people who viewed the meeting page during that time (total participants) as well giving access to file of all the participant ID numbers (this is really only helpful for use in custom reporting scenarios). The "view transcript" link provides a page that shows the entire conversation during the meeting time for people who could not participate live.

Denver Food

03/09/2016 02:00PM – 03/09/2016 02:35PM   Change date

Total Participants: 18

View participants list
View transcript

49 Posts
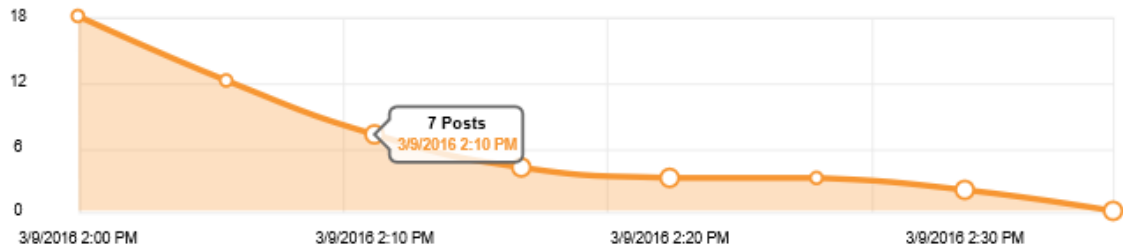
215 Replies
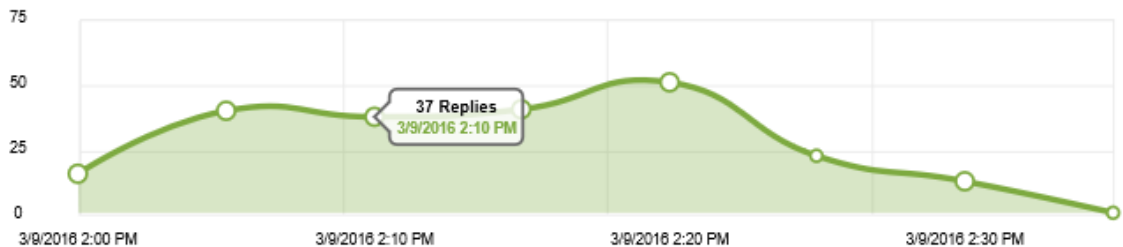
135 Likes
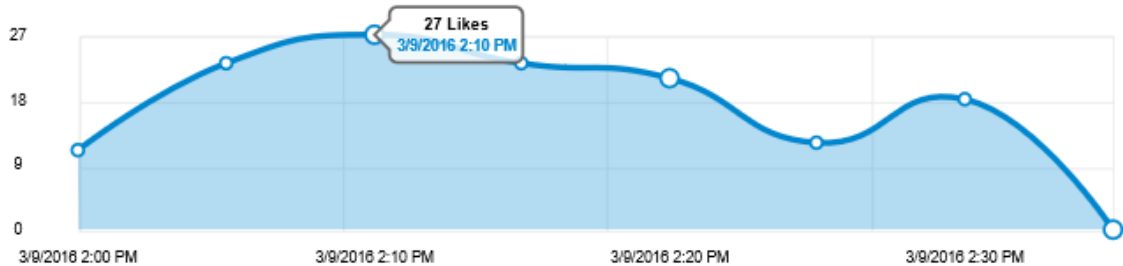
13 Meeting Questions
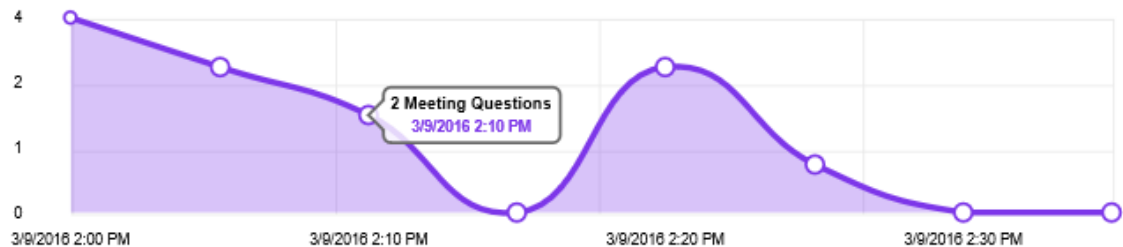
At the bottom of the summary page, the most active participants in a few categories are highlited.

Most Posts		Most Replies		Most Likes		Most Meeting Questions	
Isabelle Szucs	11	Jonathon McDougall	52	Terence Brown	21	Jonathon McDougall	2
Daniel Larson	8	Brian Kellner	20	Isabelle Szucs	16	Daniel Larson	2
Jonathon McDougall	5	Cindy Houck	16	Jenny Blumberg	16	Jenny Blumberg	1

This can be helpful if you to reward certain behavior (e.g. give a prize to three people who replied the most).

Sitrion Social Idea Stream

Overview

Idea Stream is an optional Sitrion Social module supporting the crowdsourcing of ideas.   Sitrion Social also has an Innovation Solution that nicely leverages this crowdsourcing capability to support the vetting and execution of ideas.

NOTE: Starting in the 5.2 release, translation of ideas is supported if your deployment has been configured to have real-time translations active. This capability is not reflected in the screenshots below.

Crowdsourcing Ideas

Leveraging the genius and the creativity of a large audience to further innovation starts with the crowd-sourcing of ideas. The ideas campaign is central to this process.

Campaign Creation

Campaign Creation from a Community

In many cases, campaigns are logically targeted at the members of a community. For example, a Product Management community may want to run a campaign around prioritizing new features. This is easy to accomplish. Starting from the community site, choose Site Actions -> New Site.
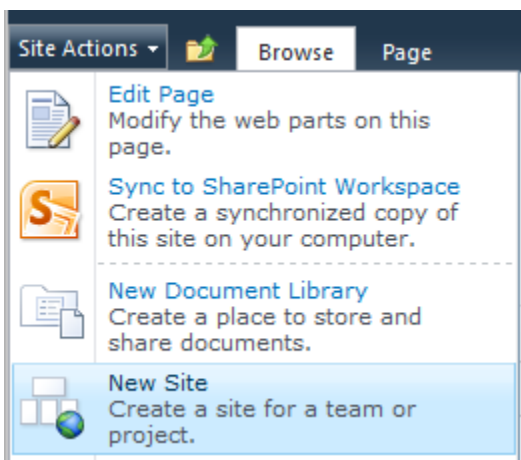
For a public community, choose the public campaign site definition.

Once you select "Create", the campaign sub-site is created and it is automatically joined to the parent community. The campaign automatically defaults to "marketplace mode" (See "Campaign Modes" below).
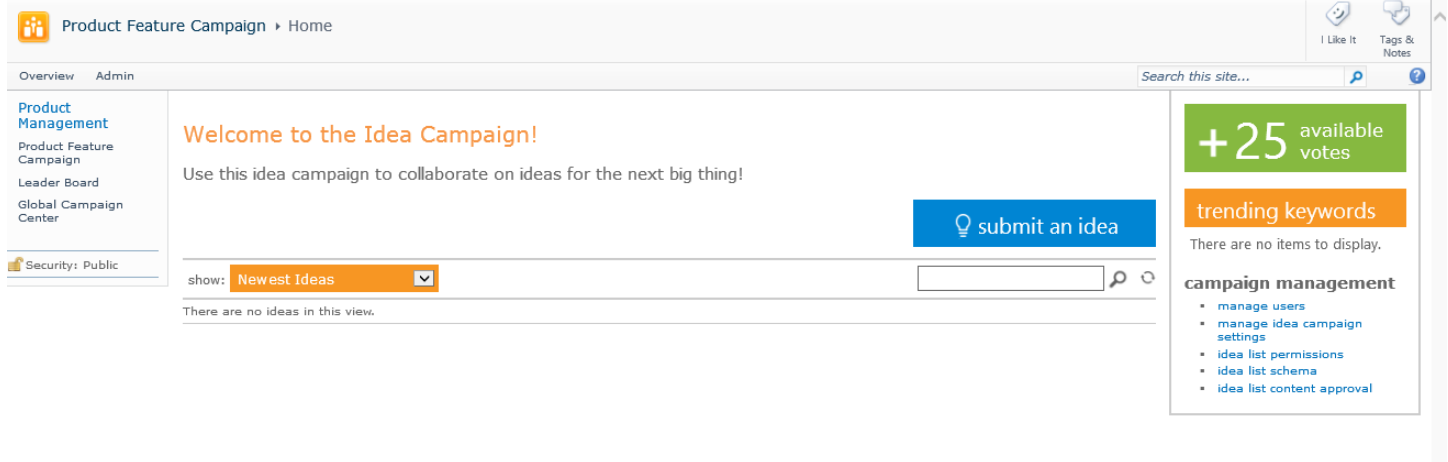
Administrators have access to the campaign management links.

Note that if you are creating a campaign to be part of a private community, you should select the Private Campaign site definition. This will bring you to a screen where you can confirm that you want to use the same viewer and contributor groups as the parent community.
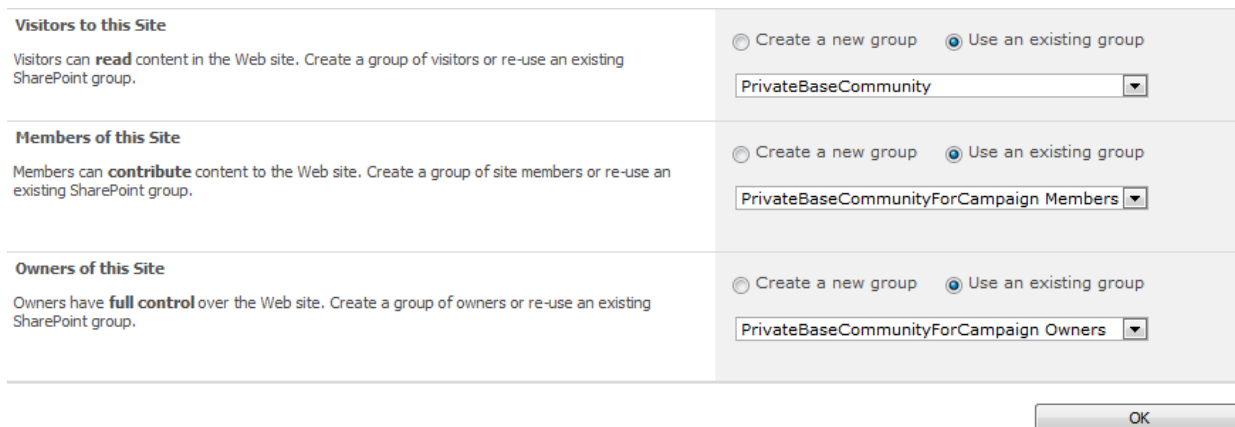
Clicking OK takes the admin to the same campaign starting page as shown above in the public campaign creation flow.

One important distinction of private campaigns (created either as part of a private community or as standalone sites) is that they cannot be published to the global directory of campaigns. This is shown on the Manage Idea Campaign Settings page with message.

From the site settings (manage site features) page, it's easy to see that two features are automatically activated for this site.

The community context feature associates the site with the parent community so that activity in the site flows through the community activity stream. The NewsGator Idea Stream Campaign feature identifies this site as a campaign.

Standalone Campaign Creation

Campaigns can also be created in a standalone mode (not as part of a community). To do this, create the campaign from a site or site collection that is not a community. To have the campaign act as a community (allowing people to follow it and see the ideas and comments as community actions in the activity stream), activate the NewsGator Community Web feature.

Campaign Modes

There are three campaign modes: Marketplace, Suggestion Box and Classic.

Marketplace mode

At creation time, campaigns are created in Marketplace mode.   Marketplace mode allows users to weight the value of different ideas by casting multiple votes on a given idea.   In this mode, each user gets a pool of votes determined by the campaign administrator. The default number of votes is 25. As users vote, their pool of votes is reduced. Once all votes are cast, no more votes can be added to any idea. However, users can take back votes which they have applied to ideas and these votes go back into the pool for that user.

The screenshot below shows the manage idea campaign settings page where marketplace mode is enabled and configured.

☑ Publish this Campaign and its Ideas in the Global Idea Center Rollup Views and Global Campaign Directory

By default, this campaign is in Classic mode unless another mode is chosen below. In Classic mode, users are given one vote per idea.

☐ Enable suggestion box mode

Suggestion box mode affects all other settings: Voting is disabled and idea submission can be set to anonymous. All references to voting in the display will be removed for this campaign and its ideas.

Make all suggestions anonymous ☐

☑ Enable marketplace mode

Marketplace mode affects all other settings: user actions are only permitted between the start and end dates. Users are given a "budget" of votes to spend on ideas, with winning votes affecting the leaderboard for this campaign and the global leaderboard.

Start Date (mm/dd/yyyy): [   ]

End Date (mm/dd/yyyy): [   ]

[15] Votes Per User

☑ Enable idea submission
☑ Enable idea comments
☑ Enable idea votes

[Reset Votes]

[Save]

Start date, end date and votes per user only apply if marketplace mode is selected. If a start date is specified, no actions (submitting, voting or commenting on ideas) can be done until the start date is reached. If an end date is specified, no actions can be taken after the end date is reached. Note that specific actions can still be disabled by unchecking the relevant box. The pool of votes can be set to any positive integer value. In general, campaign administrators will want users to have enough votes to be able to show significant support for ideas they prefer. At the same time, giving very large pools of votes to users is not recommended because it will require many clicks for users to cast all the votes. The number of votes per user should not be changed once the campaign starts.

Here's a sample marketplace mode campaign that grants 26 votes per user, has started but hasn't reached the end date yet:

Suggestion Box mode

Often communities want to have a capability to capture ongoing suggestions in an open-ended campaign by having a virtual suggestion box.   Suggestion box mode supports this use case nicely.   There is no voting in this mode.   In some environments, transparency is enhanced when users can submit anonymously and so this is an optional setting for suggestion box mode.   Clicking on "Make all suggestions anonymous" will ensure that the identity of the submitter is not revealed. Please note that comments on ideas in anonymous mode are NOT anonymous.

Here is an example of a campaign with suggestion box mode turned on:

"Let's Build a Sustainable Company" Idea Campaign

Do you have an idea to make our company more sustainable? Ideas can be related to a cost saving measure, a process improvement, employee and/or environmental welfare, and so on. No idea is too small or too big! Our goal is to be an efficient, cost-effective company that can maintain business on it's own with little or no outside resources and/or funding - now and in the future. Let's make Stronger Ideas Together!

This campaign is for testing and demo purposes only.

💡 submit an idea

show: [Highly Commented ▾] ▤ ≡   🔍 ↻

No More Free Soda and Junk Food
Submitted by Jennifer Keyerleber 6 months ago

I think this idea will go over like a lead balloon - but it's only a test idea :) #idea #health #sustainability Glad to see the hashtag autocomplete working! However, the similar idea suggestions is still not working.

Comment | View Comments (5) | View Details

Provide Tesla's to Everyone
Submitted by Chris Keyes 4 months ago

I think providing electric sports cars is definately the best place to start. People would spend much less time getting to work and have an enjoyable time getting there making them more productive (let alone the positive impact on the environment).

Comment | View Comments (4) | View Details

Consider Recycled Materials for Our Marketing Materials
Submitted by Jennifer Keyerleber 6 months ago

Have we researched the option of using #recycled #materials to create and ship our investor kits? And not only that, it would be ideal if our #packaging could also be recycled after it's used. #marketing #fulfillment #green #environment

Comment | View Comments (1) | View Details

trending keywords

#energy #environment

#green #healthy

#incentives #office #recycling
#resources #revenue #save #SEC
#services #social #solar #state
#sustainability #sustainable #T
#turnover #upselling

campaign management

- manage users
- manage idea campaign settings
- idea list permissions
- idea list schema
- idea list content approval
- idea list export
- manage idea categories

Here is an example of a campaign with an anonymous suggestion box enabled. See that the idea submission is anonymous but the commenting is not (highlighted in red):

Classic mode

In the case where both suggestion box and marketplace mode are disabled, the campaign defaults to classic mode. Classic mode allows the casting of one vote per idea per user.   Classic mode campaigns do not support automatic start and end dates and do not have an anonymous submission option. Like the other modes, classic mode campaign capabilities are driven by the setting of the other (last four) parameters.

Idea Categories

To make it easier to manage and browse ideas, leaders can specify categories on a per campaign basis.

Creating categories

To add categories to a campaign, go to Campaign Management > Manage Idea Categories:

campaign management

- manage users
- manage idea campaign settings
- idea list permissions
- idea list schema
- idea list content approval
- idea list export
- manage idea categories

Click on Manage Idea Categories and the Idea Categories panel appears.   For each required category, type in a category name and click Add. Close the Idea Categories window when done. Note that this panel can be used to edit and delete categories. Be sure to remove all references to a category before deleting it.

Idea Categories ✕

		Add

hr	Edit	Delete
development	Edit	Delete
it	Edit	Delete
admin	Edit	Delete
engineering	Edit	Delete
finance	Edit	Delete

Campaign Rollup Pages

Frequently a company will run multiple campaigns at the same time. Even individual communities could be running multiple campaigns. The rollup pages serve two primary functions: they provide an easy way to discover campaigns that are running, and they show leaderboards for ideas and idea submitters.

Community Rollup Pages

At a community level, the rollup page is enabled by activating a site feature.

The NewsGator Campaign Center feature will add a "Campaign" tab to the community.

Global rollup page

A global campaign rollup page is automatically deployed to http://[ServerName]/_layouts/ng/idea/ideacenter.aspx

This page has identical functionality to the community page detailed above. The primary difference is that campaigns are listed on this page, and their ideas on the leaderboards of this page, because the "publish" setting is checked on the manage idea campaign settings page.

Also note that campaigns which are part of a community can also be published to be visible in the global page. Clicking the publish checkbox is not required to make community campaigns visible on the community rollup page.

Campaign Center

View All Campaigns

Show: All [▾]   [_____] 🔍

30Features	Total Votes : 702
Mobile Capabilities	Total Votes : 25
Product Support Materials	Total Votes : 249
Test Idea Campaign For 2.6 Docs	Total Votes : 2
TestCampaignSubsite1	Total Votes : 5

View Leader Boards

top ideas   top idea submitters

All Campaigns Dashboard

MOST ACTIVE

30Features	Total Votes : 702
Product Support Materials	Total Votes : 249
Mobile Capabilities	Total Votes : 25

RECENTLY ADDED

Mobile Capabilities	02/28/2012
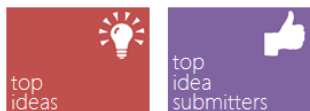
Note that private campaigns may not be published to this page. Also, if you intend to delete a campaign for some reason, you should ensure that the "publish" checkbox is unchecked and the settings are saved before you delete the campaign site.

One-click Campaign Creation

From either the global campaign rollup page or the community campaigns overview tab, you can create a new campaign by clicking the "Create Campaign" button.

Only users who have the rights to create a site will see the create campaign button (so only users who could otherwise have gone through the Site Actions -> New Site flow detailed above). Clicking the create button opens a dialog that allows entering a title and URL.

After clicking "create", the campaign is created and the home page of the campaign site is displayed.
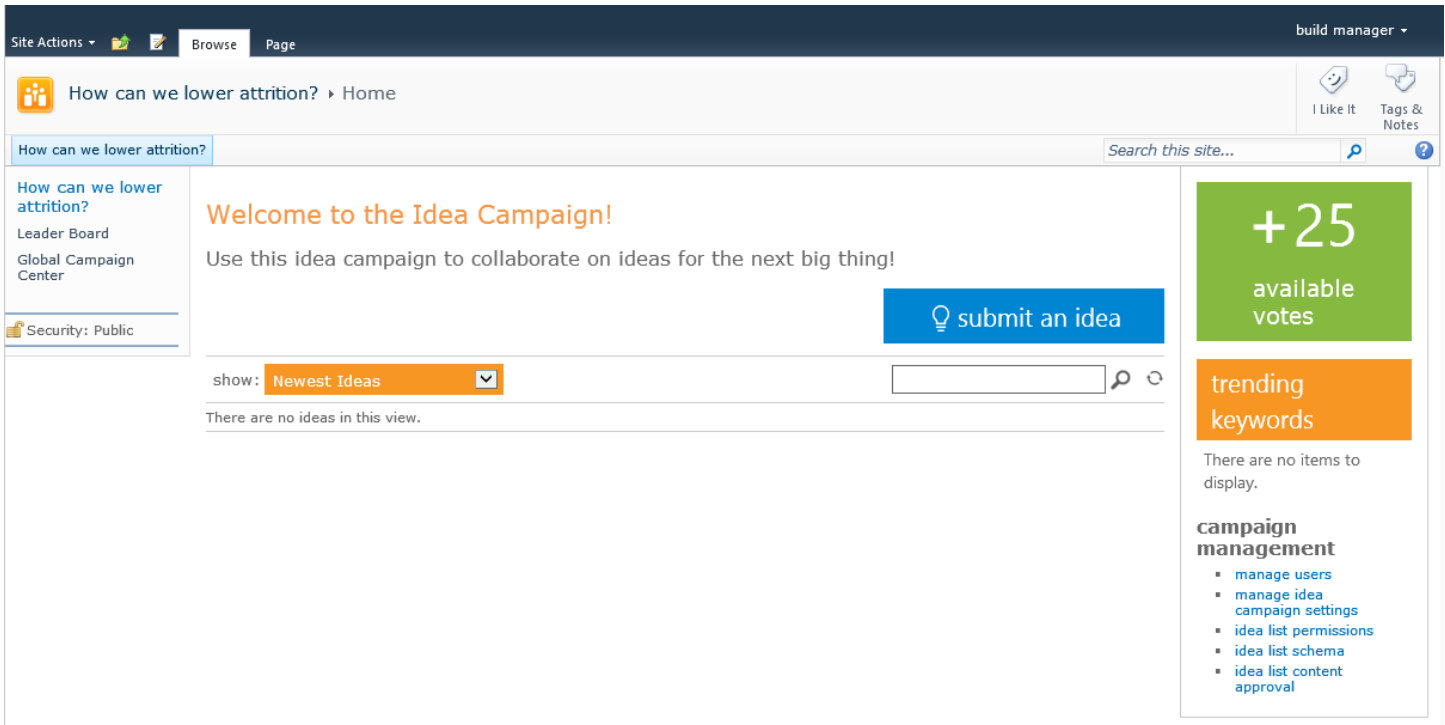
Campaign Configuration and Operation

The admin has access to a set of campaign management links which will not be visible to end users.

The "Manage Users" link provides access to the SharePoint permissions for this site. Here you can add specific users or groups and use SharePoint's emailing functions to notify them if you want. Typically, the user access is set automatically during the creation of the campaign. But if you need to manage permissions, this link provides a shortcut.

The "Manage Idea Campaign Settings" link provides access to the controls mentioned previously including the ability to enable or disable idea submission, voting and commenting. All of these settings default to On at the time of campaign creation. For a campaign that is in Marketplace mode, if the start date is still in the future or the end date has already passed, checking these options will not matter – the campaign will be closed.

In many campaigns, idea submission will be enabled first with voting disabled. This will allow open brainstorming before a review is performed to assess which of the suggestions are viable enough to be included in the voting phase. Once voting is opened, new idea submission can be shut down. Turning off capabilities changes the status message on the front of the campaign as well as disabling functions such as voting and commenting from being performed in the Activity Stream.

A campaign owner can refund all spent votes and reset all ideas to zero votes (see "Reset Votes" button). This is intended to help with the situation where you have a campaign that you want to run periodically. So after running a campaign and dispositioning the ideas (promoting, implementing or closing) as needed, the campaign owner can re-launch the campaign. The advantage here is that the remaining ideas are already entered in the campaign and available for voting (and still have their original comments on them).

Clicking the "Reset Votes" button causes a confirmation dialog to be displayed
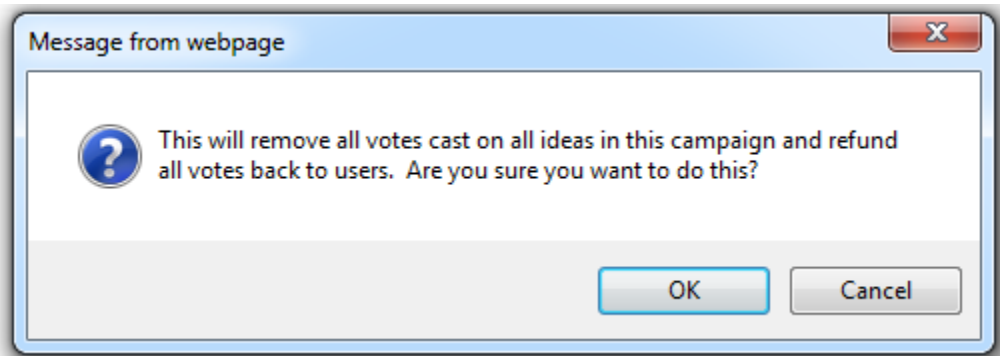
Once "OK" is clicked, users get their pools of votes back (in marketplace mode) and all ideas are reset to zero votes.

The "Idea List Permissions" link displays the SharePoint permissions. In most cases, your ideas list should be inheriting the appropriate permissions from your parent community site or you should have chosen specifically when creating a private campaign site. This link will let you edit permissions further on the list if necessary.

The "Idea Schema" link takes the admin to the settings page for the Ideas list. The Campaign creation flow automatically generates an Ideas list which includes several default fields for Title and Description. To add new fields to collect with each idea, click the "Create Column" link (see screenshot below).

Adding columns, along with everything else on this page, is standard SharePoint functionality.

When the admin clicks the "Create column" link, a form displays to allow definition of the new column (in this example, an opportunity for the person who is submitting a name idea to list potential trademark issues for that name).

The "Idea List Content Approval" link takes the admin to the versioning settings for the list which includes an option to require approval before any new item enters the list.

This is useful if all ideas need review before becoming visible. Note that ideas that have been submitted not approved have the status of "Pending". This state is only visible in the analytics.

Sometimes it may be helpful to work directly in the Ideas list.   End users can view this list directly and even vote from this view if they want. Admins will typically access the list view for filtering, sorting, and editing ideas.

Administrators can change ideas between statuses (e.g. from closed back to submitted to allow further interaction). When an idea is edited or gets a change in status, it is best practice to include information in the moderator comments field. To change an idea status, click the edit link from the View Details screen.

Changing the idea to promoted, closed or implemented will prevent further commenting or voting on the idea. For Marketplace mode campaigns, it's best to disposition the ideas at the end of the campaign unless you're closing an idea to indicate that it isn't going to be viable. When the idea status is changed to implemented or promoted, activity stream items are created to inform the idea submitter of the change. Promoted status is typically used to indicate an idea will be considered for the next stage. Implemented is used to represent that an idea was carried through to completion.

Closing the Campaign

Campaigns close either from reaching the end date or by the policies (submit, vote, comment) being turned off. When all policies are turned off, the filter on the front of the campaign is automatically switch to "Promoted" which includes ideas in Promoted and Implemented status.

Export ideas with comments

Ideas with comments for a given campaign can be exported into a Microsoft Office Excel format. The export will create one row per idea and one row per comment under the corresponding idea. To perform the export go to Campaign Management > Idea List Export as highlighted below:

campaign management

- manage users
- manage idea campaign settings
- idea list permissions
- idea list schema
- idea list content approval
- idea list export

The Idea List Export creates a file called IdeaExport.xls. Here is an example:

	Sort	Type	Title	Text	CreateDate	Author	Votes (likes for comments)	
1	Sort	Type	Title	Text	CreateDate	Author	Votes (likes for comments)	
2	00001	Idea	Direct deposit for travel expe	Would be great if we could get direct dep	2013-09-05T07:42:35Z	Tom Sigler	3	
3	00001.0001	Comment		I'm in the office less and less, this would r	2013-09-05T14:01:36Z	Ronnie Gilbertson	0	
4	00002	Idea	Create a OnTheRoad commu	Best flights, Best Hotels per location, Sho	2013-09-05T08:04:47Z	Ronnie Gilbertson	1	
5	00003	Idea	closed idea (test)		2013-10-29T13:26:51Z	Chris Keyes	1	
6	00004	Idea	Corporate Kickstarter Progra	[img]/IdeaTestCom1/Shared%20Pictures.	2013-09-05T08:17:38Z	Jonathon A. McDougall	1	
7	00005	Idea	Use agile processes	Agile processes can help build more usa	2014-01-06T13:25:36Z	Chris Keyes	1	
8	00005.0001	Comment		Great idea. Let's do it!	2014-01-06T21:03:15Z	Chris Keyes	0	
9	00005.0002	Comment		Done! It's in next build.	2014-01-06T21:05:02Z	Christian Boult	0	
10	00005.0004	Comment		Thanks!	2014-01-06T21:07:05Z	Chris Keyes	0	
11	00005.0005	Comment		No, no, thank you!	2014-01-06T21:21:10Z	Chris Keyes	0	

Sitrion Social Innovation Solution

Overview

The Innovation Solution is an optional and separate offering from the Sitrion Social core offering. It includes all the features that relate to the crowdsourcing, evaluating, and executing of the innovation process.   The Innovation Module requires and includes the Idea Stream module which provides the crowdsourcing.

Valuable ideas or groups of ideas that are sourced from Idea Campaigns can be put into Innovation Labs, essentially a collaboration workgroup, so they can continue the incubation process of being discussed and vetted by experts. Within the Lab, ideas with merit are turned into project proposals where the true research and business case process begins. These proposals are discussed in the Lab and have all of the supporting documentation tracked against them. Proposed projects that are deemed to be viable are launched from the lab into a project-specific community - with all of the relevant description information and documentation exported to it.

To ensure that the entire innovation process aligns with and supports corporate objectives, the Innovation solution includes a mechanism for specifying corporate objectives that can be cross-referenced to labs, project proposals, and projects.

To ensure that the overall innovation process is fruitful, a set of dashboard reports are available.

Implementing Ideas

Innovation Labs

Creating an Innovation Lab

SharePoint 2010

Creating an Innovation Lab is like creating any other Sitrion Social community. Go to the Site Actions menu and click on New Site.
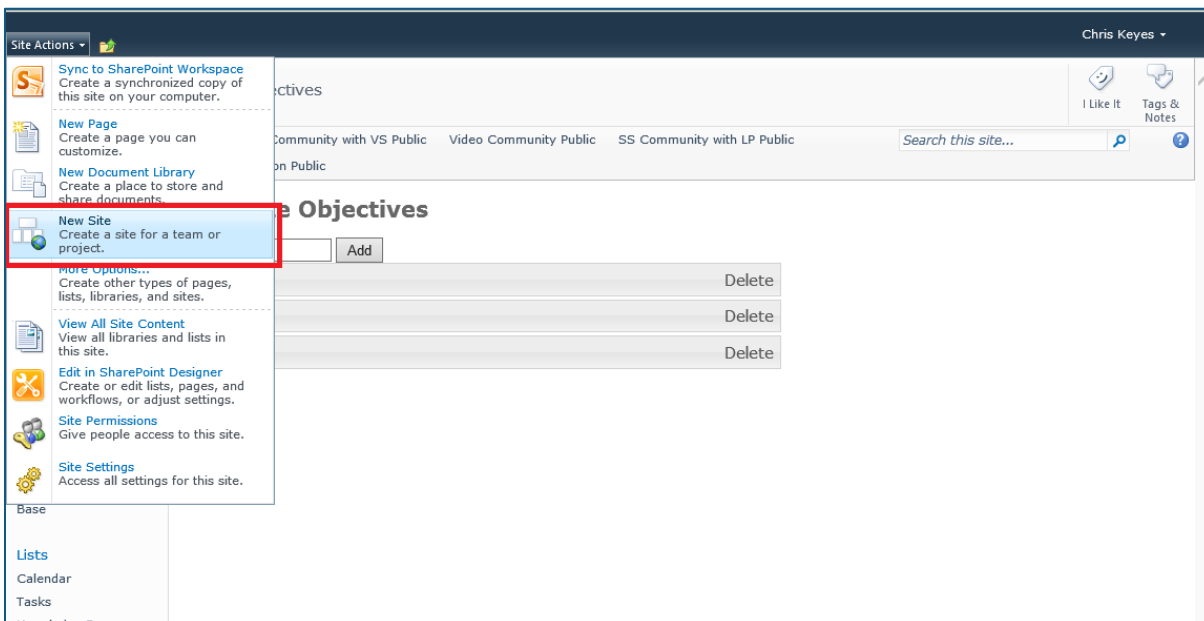
Select the Innovation Lab template, specify a name for the lab and a relative URL as seen below:
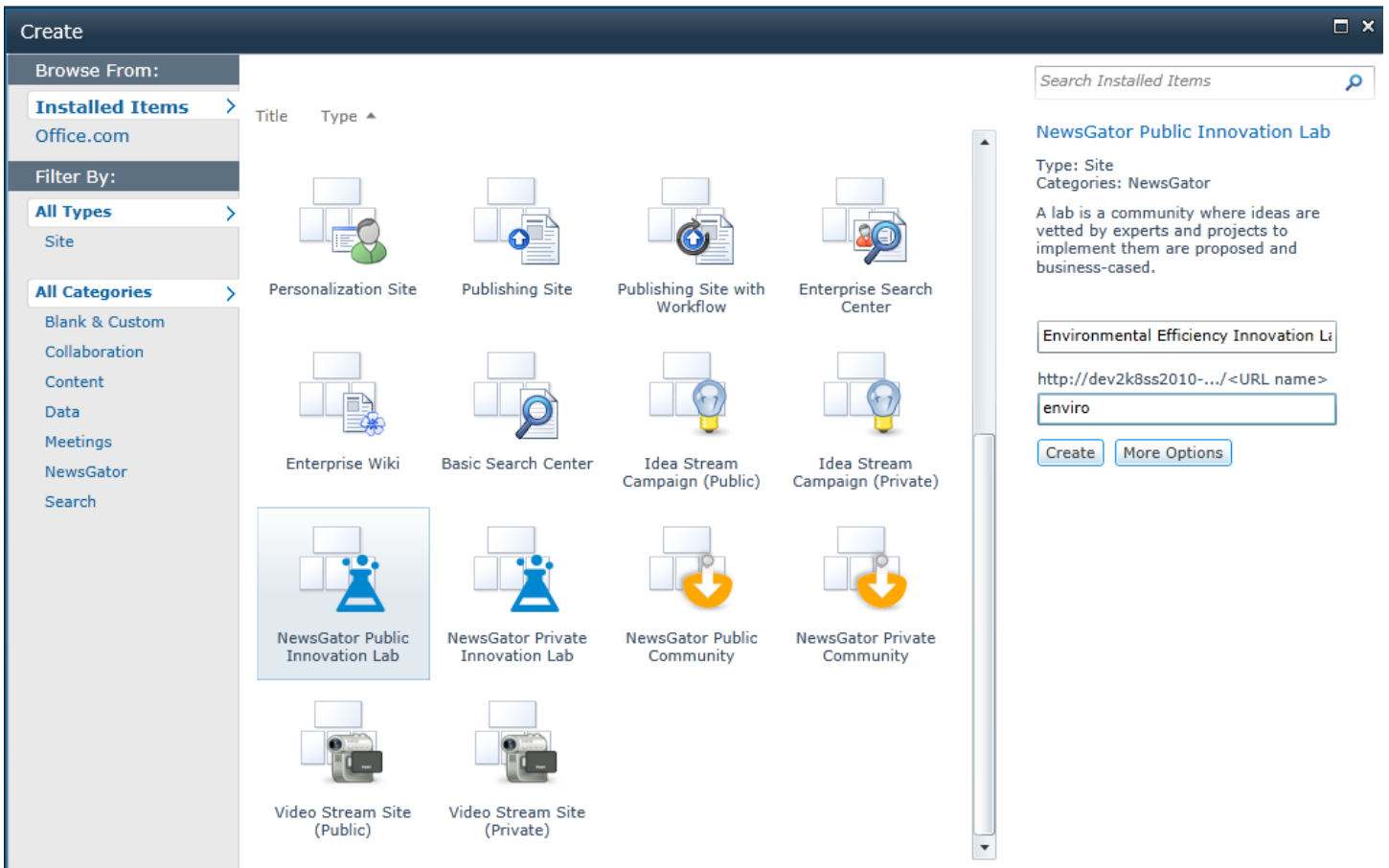
Configure the Lab as you would a regular Sitrion Social community and click on Ok when done.
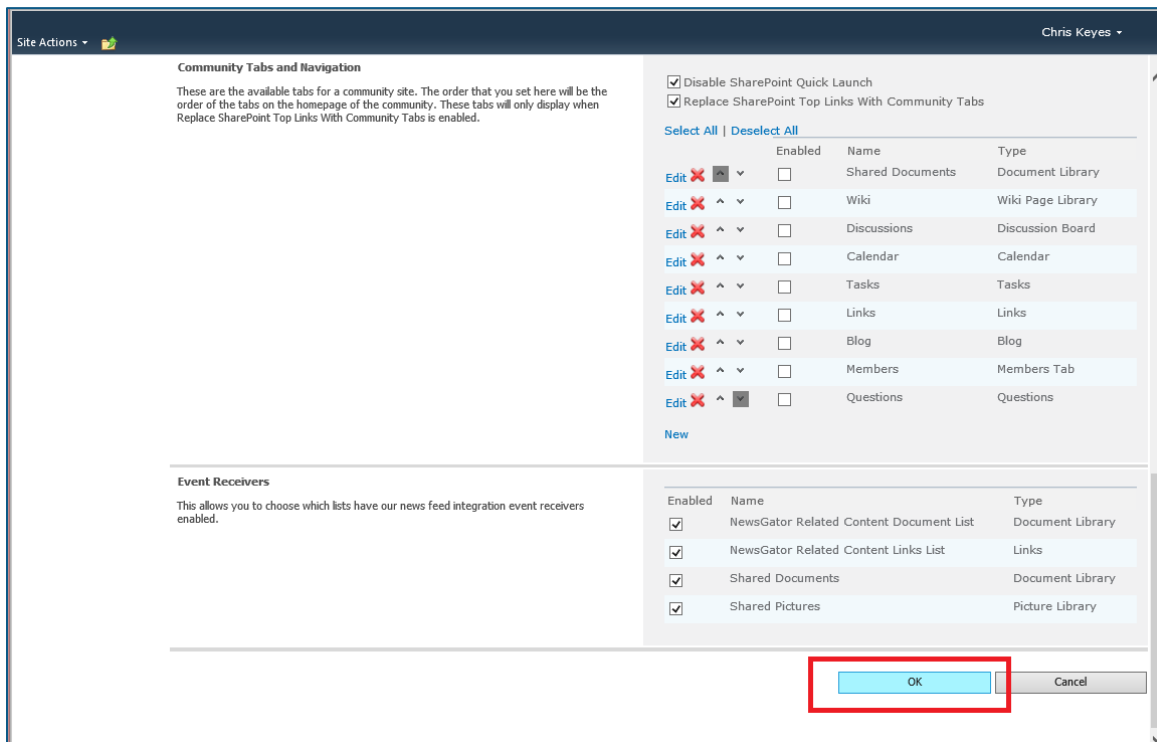
When the creation process completes, you will be taken to the newly created Lab.

SharePoint 2013

To create a lab in SharePoint 2013, create a regular Social Sites community and then activate the lab feature "NewsGator Innovation Lab" for that community (Site Settings > Site Actions > Manage Site Features):
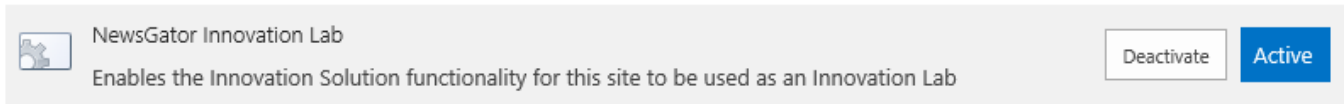
Configuring an Innovation Lab

After a Lab is created there are additional items to be configured to finish the setup. Click on Edit in the top middle box to do so. This is where the Lab description, goals, and corporate objectives should be input. This information will inform Lab visitors about the purpose of this Lab and the corporate objectives it is supporting.
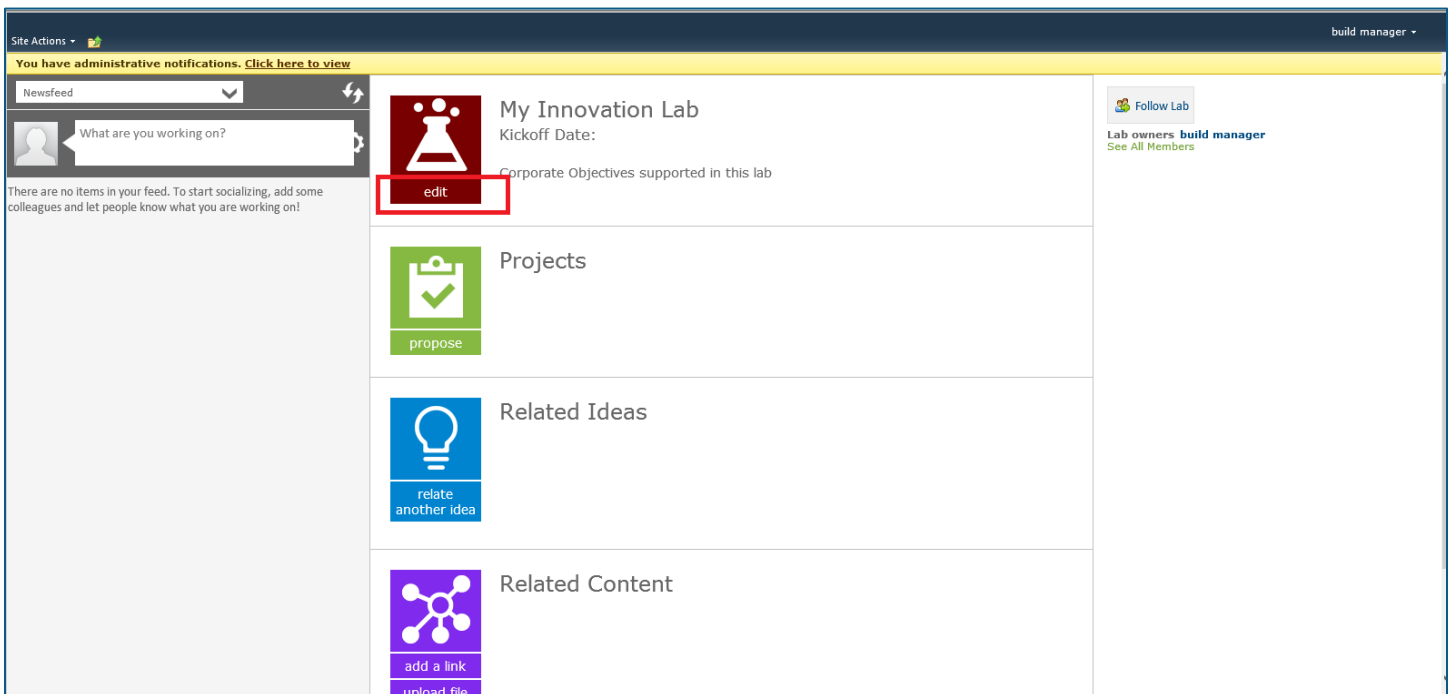
Fill in the Lab goals, kickoff date, and tags. Select the relevant corporate objective. Click Ok.

This is what the Lab properties should look like:

Other Administration

A lab is specialized Sitrion Social community with a similar set of administration features. To get to the community administration is similar to a regular community i.e. Site Actions > Site Settings > Community Site Management – Community Administation. See the administration page in the two images below:

Admin Links

- Go To Setup
- Edit Membership
- Spotlight Administration
- Followers are managed by the SharePoint group "Home Members". (Members of this group will auto-follow this community when the community processor job runs, unless they opt-out.)
- Social List Settings
- Edit Classifications and Interests
- Email Members

Top Users Activity Report

Most Active Users over the past 90 days

Name	Events
Jennifer Keyerleber	26
Chris Keyes	10
Chris Keyes	7
Nate Hollingsworth	4
Brian Kellner	3

◁◀ Page 1 of 3 ▶▷

Activity By Type

Activity by type in the last 90 days in Environment Efficiency Innovation Lab

Project Proposals: 6
Microblogging: 4
Likes: 3
Other: 4
Comments: 19
Refenrenced Ideas: 14
Bookmark: 10
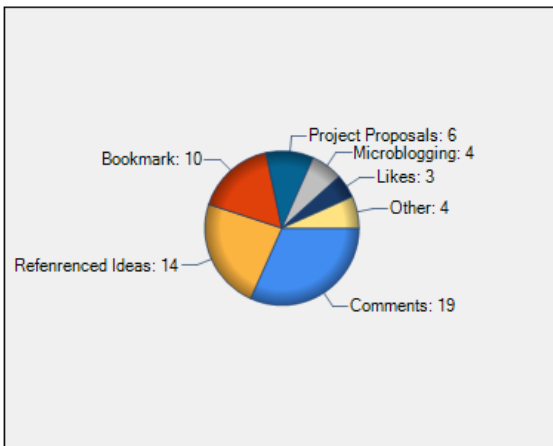
Other:
Microblog Questions: 2   Documents: 1   Pictures: 1

Admin Notifications

Activity History

Select Event Type: [All Events ▾]

Last 90 days of activity in Environment Efficiency Innovation Lab
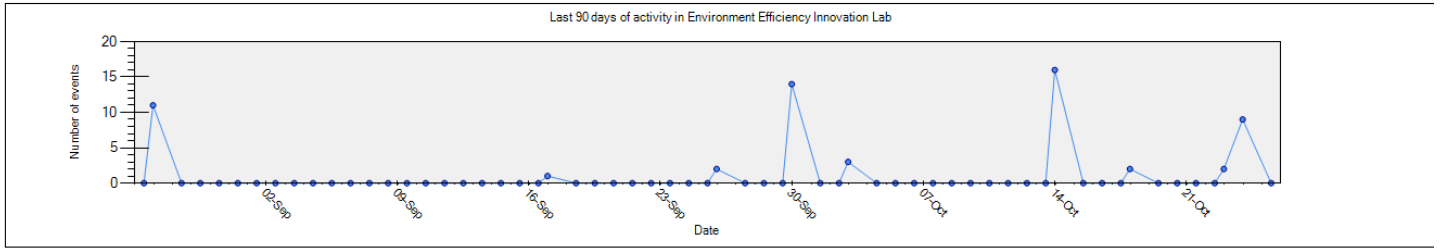
Export Report

Choose a date range and export an activity report as CSV file.

From: [   ] to: [   ]

[export]

Specifying Experts

Experts play a key role in an Innovation Lab as they will vet and analyze the viability of the project proposals initiated within the Lab. Sponsors will approve and fund project proposals in order to continue the execution process. A Lab Manager can easily designate users as Experts and Sponsors using the Members console (click on See All Members under Follow Lab button) and checking the appropriate roles. This console displays all of the Lab Followers and the Lab Manager can click on the desired role for each of the Lab Followers (potential experts will need to follow the lab first). By default, Lab Managers, Sponsors, and Experts have permission to relate ideas to the Lab, propose projects, and launch proposals into stand alone projects. Only Lab Managers and Sponsors can edit the Lab properties. For a complete description of roles, please see the Lab Roles and Permissions section below.

After closing the window, the changes will be reflected on the Lab page.
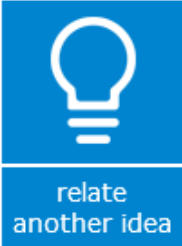
Relating Ideas into an Innovation Lab

From Within an Innovation Lab

Ideas that are to be vetted by experts are cross-referenced into the appropriate Innovation Lab. The ideas still "live" in the campaigns where they originate and are simply cross-referenced to the related Lab. To relate an idea to a Lab, go to the Related Ideas area in the bottom right corner of the main Lab page and click Relate Another Idea.

When the Idea Chooser pops-up, select the idea campaign where you want to source existing ideas.
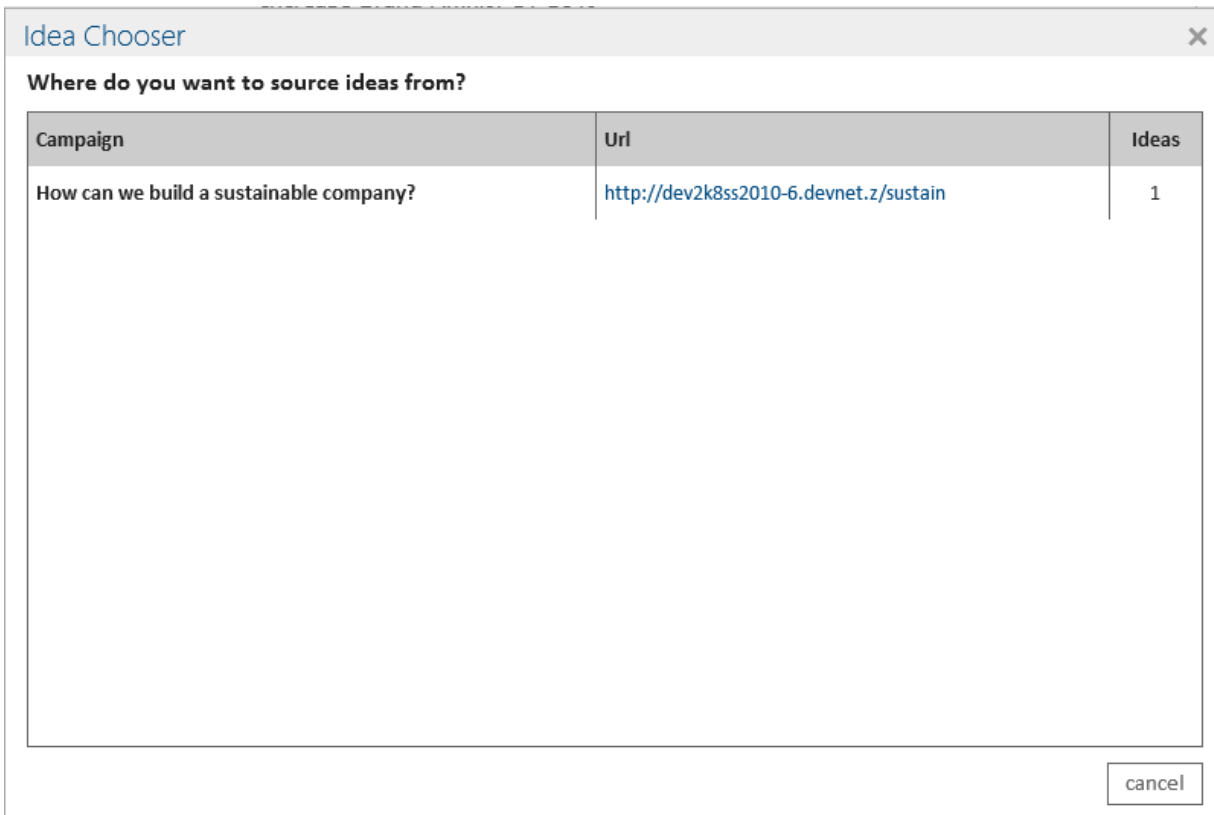
Select the idea(s) you want to relate into the Lab and click Select.
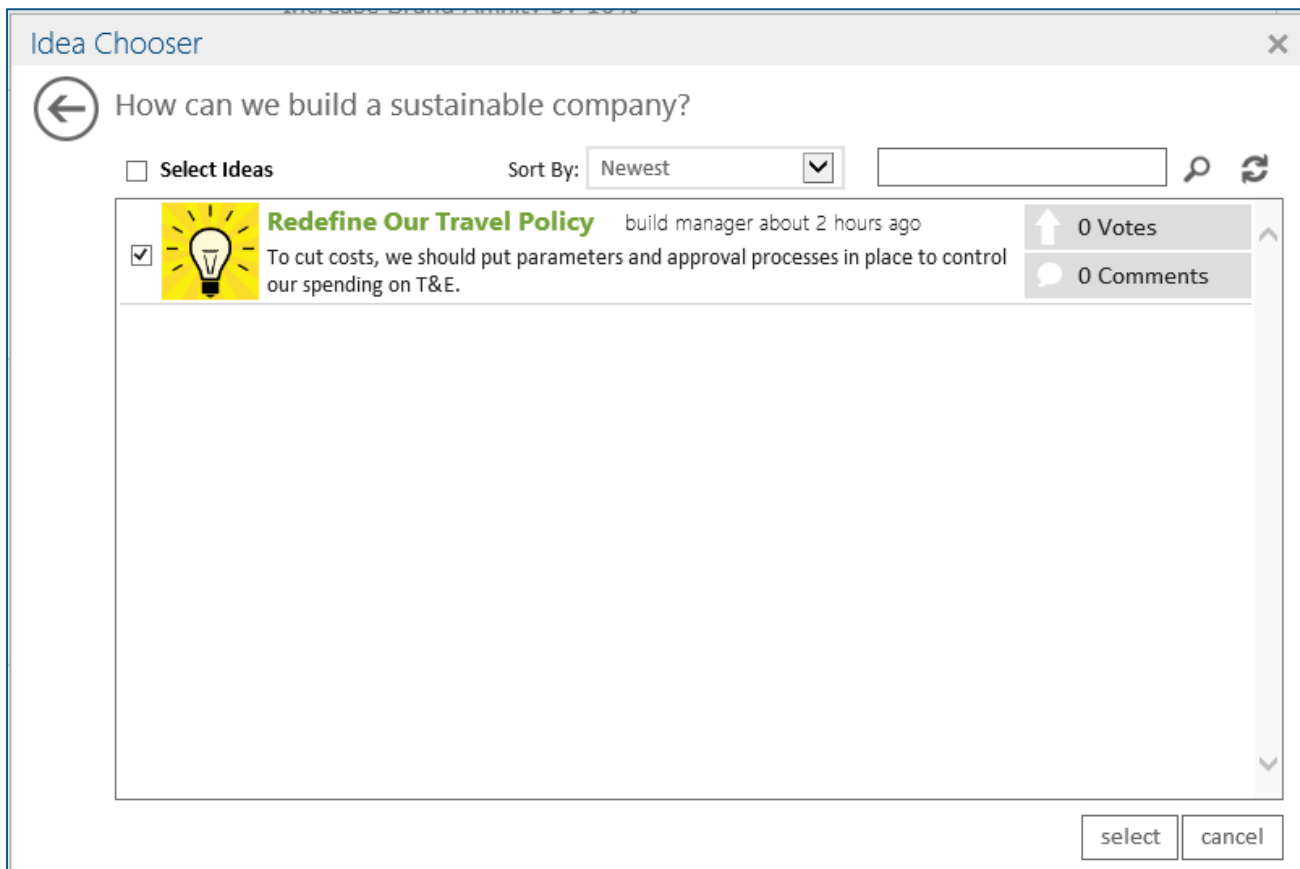
The selected idea(s) now appears in the Lab.
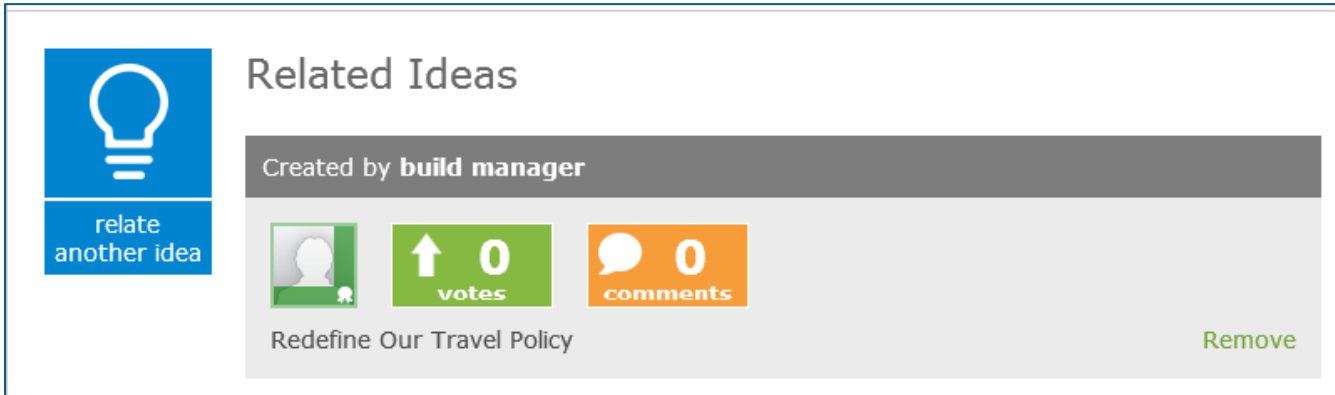
Clicking on the idea title pops up the original idea in its standard form with all of the standard idea functionality. Relating an idea also generates an event in the stream.
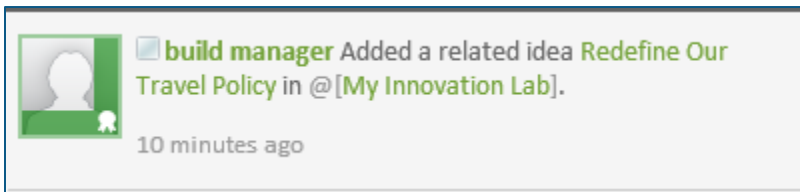
From Outside an Innovation Lab

Sometimes it's a little more efficient to browse through multiple Idea Campaigns and relate ideas into various Labs without having to go into the Lab itself. This is supported through the Idea Chooser available in Innovation Solution Administration.
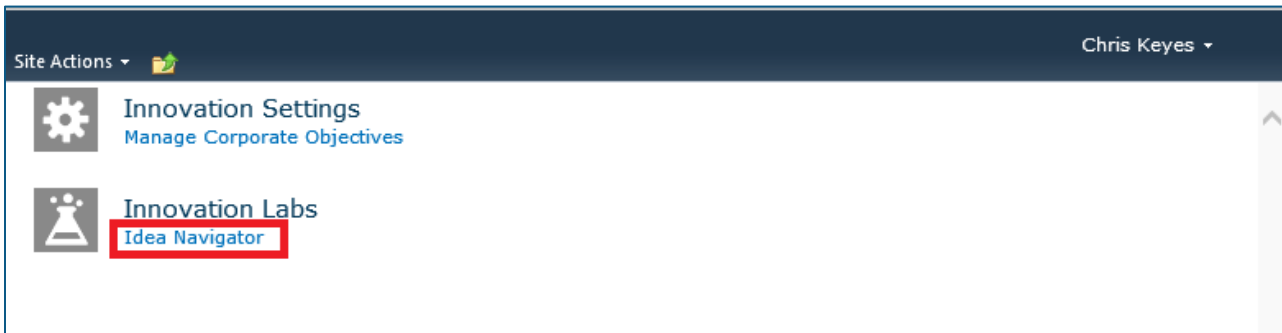
Clicking on the Idea Chooser pops up a console prompting you with the list of Idea Campaigns and Communities that have ideas.

After selecting an Idea Campaign or Community, select the ideas you would like to associate with a Lab. To help with the selection process, ideas can be sorted by recency, the number of comments, the number of votes, or be filtered to show only those ideas that have been promoted. Ideas for the selected Community or Idea Campaign can also be filtered by keyword.

Clicking Next takes you to a Lab selection window. Select the Lab you would like to relate the idea to and click Add. The selected ideas will be added to the chosen Lab.

Idea Chooser   ✕

← 1 idea selected

Choose a destination Innovation Lab

○   **BKLabDemo1** build manager 7 days ago

○   **c2**   6 days ago

⦿   **My Innovation Lab** Chris Keyes about 17 hours ago

○   **mylab1**   7 days ago

○   **SS Community with Innovation Public** sptest farm1 7 days ago
      A super fun testing community!

○   **SS Community with Innovation Public Root**   7 days ago
      A super fun testing community!

                                                        Add   Cancel

Adding Related Content

Experts and Sponsors can add documents and links that relate to an Innovation Lab (e.g., research).

Clicking on Add a Link pops up the a dialog where the URL, description, and notes field can be filled in. Click Save to post the link.
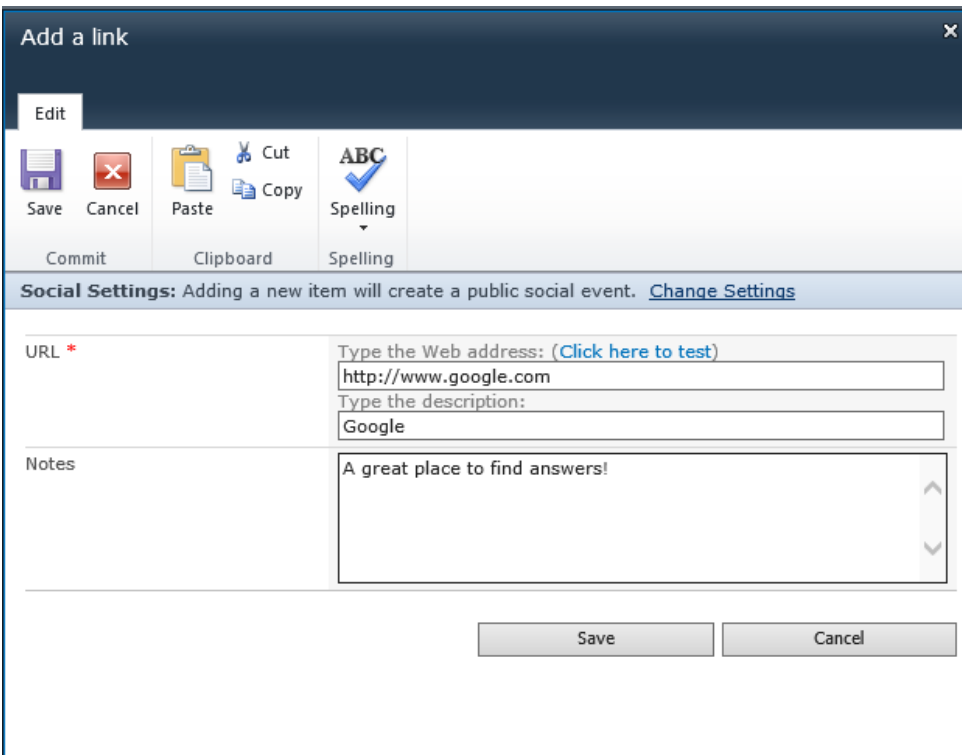
Similarly, clicking on Upload File pops up a dialog prompting for file. Clicking on Browse opens up the file chooser.
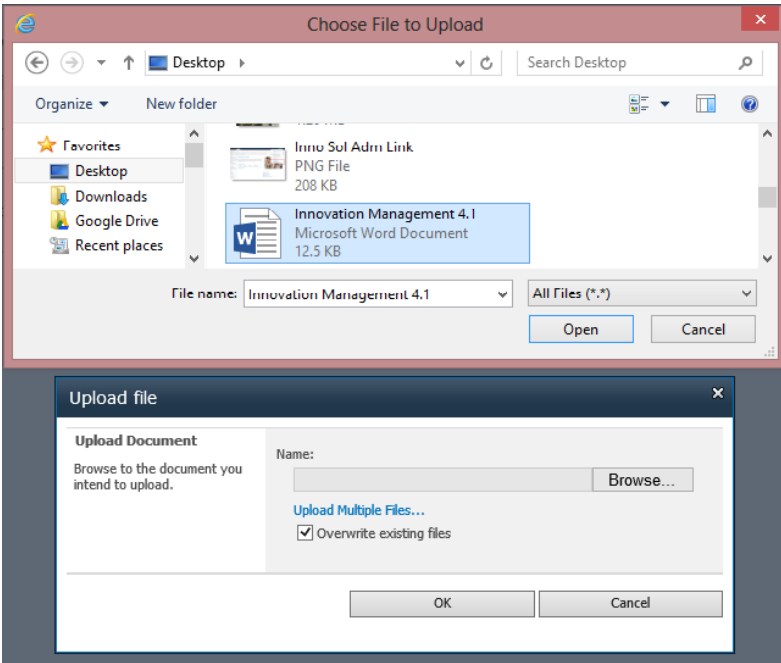
Here is what the Related Content area looks like in an Innovation Lab:
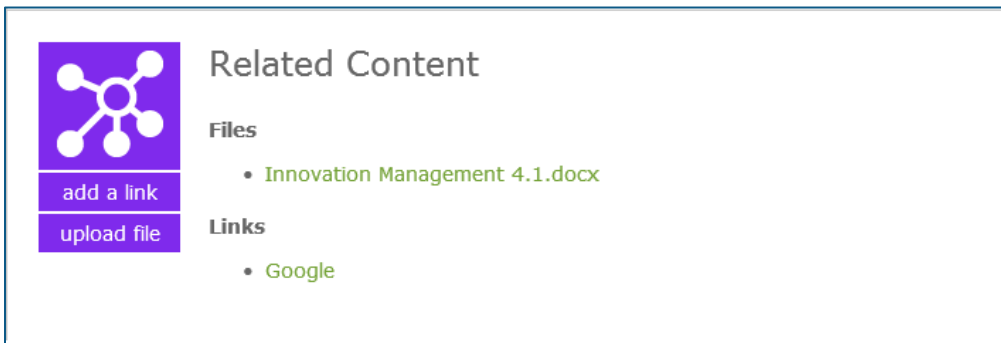
There will be entries in the stream to reflect these actions (as well others described below).
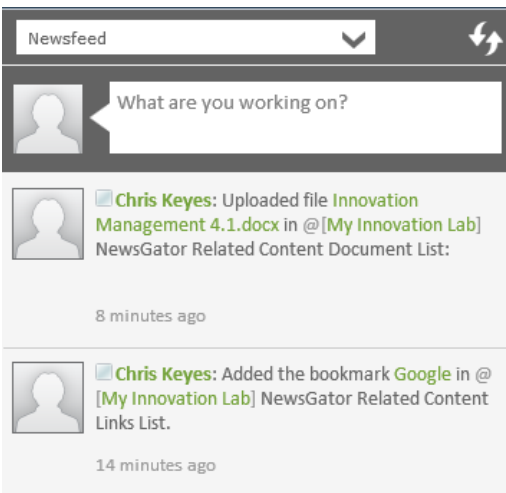
Assessing Ideas

Specifiying the Criteria

Before proposing projects to fully flesh-out an idea or group of ideas, innovation facilitators would like experts to do a high-level vetting of the ideas against a configurable and weighted set of criteria.   To specify these criteria, they click on Manage Idea Criteria under "See All Members".
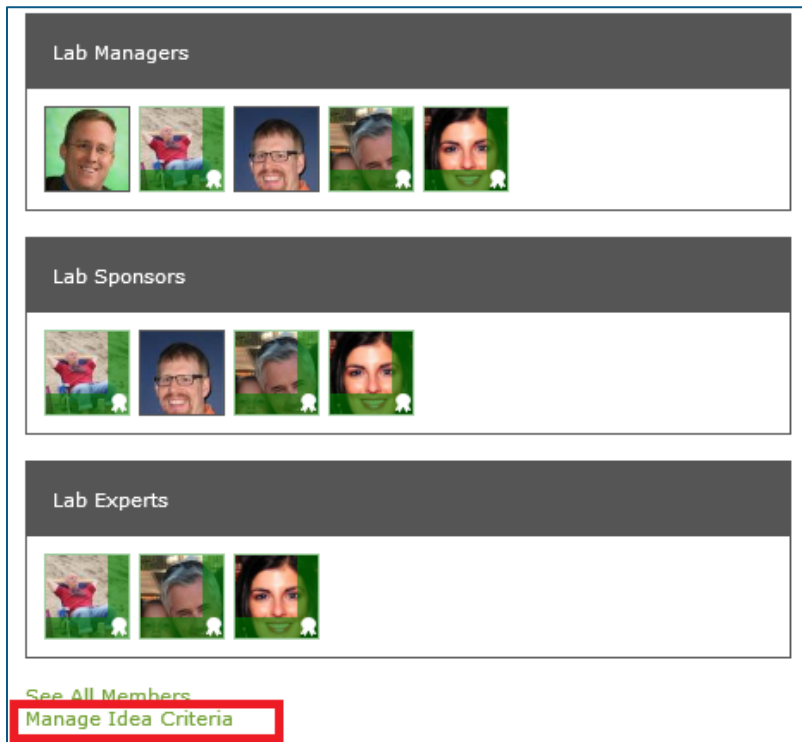
Clicking this brings up a panel where the idea assessment criteria can be specified.   Click on Add new criterion.
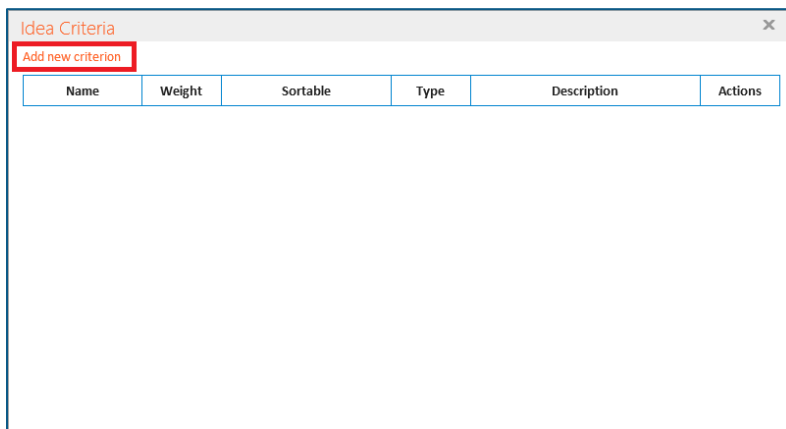
Each criteria will have a name, a type and a weight. Initially there will be two criteria types: rating and number. The sum of the criteria (times the weight) comprises the score of the idea.

Assessing the Ideas

Once the criteria (at least one) are defined, sort options display in the Related Ideas area.   There is one sort link for each criteria and one for overall points.   A points box will appear on each related idea as well as an Evaluate link.

Clicking on "Evaluate" presents an area for the expert to input the assessment data as seen below:

The expert can then click on the appropriate star for the rating-based criteria and enter a number of the value for the number-based criteria and then click Save.

Once the data is entered the points are calculated. This idea is worth 1910 points which comes from

- 1000 points for carbon footprint reduction: 100 tons carbon foot print saving times a weight of 10

- -100 points for Savings: -10,000 savings (this is a cost, obviously) times a weight of 10

- 10 points for Revenue: $1K revenue increase times a weight of 10

- 1000 points for Feasibility: full five stars (10 points per half star) times a weight of 100

Created by **build manager**				
Name	**Value**	**Weight**	**Points**	**Description**
Footprint	100	10	1000	Carbon footprint reduction in CO2 tons
Savings	-10	10	-100	Cost savings in thousands of dollars
Revenue	1	10	10	Revenue increase in thousand of dollars
Feasibility	★★★★★	100	1000	Feasibility rating out of 100

Rebate monthly parking costs for green-friendly commuters

Evaluate   Remove

Multiple Expert Assessments

In the 4.5.2 version, we introduced the ability for one or more experts to evaluate each Idea in the Related Ideas list. If more than one expert evaluates an Idea, the total points for the individual criteria as well as the total overall points for the Idea will be averaged by the total number of evaluations. Please note, that an expert that has not yet evaluated an Idea will only see the overall averages for the individual criteria(s) and the total points for the Idea.

Rebate monthly parking costs for green-friendly commuters
Created by **build manager**

Remove

Evaluations

Evaluator: splab manager

Name	Value	Weight	Points
Footprint	0	10	0
Savings	0	10	0
Revenue	0	10	0
Feasibility	★★★★★	100	0
Total points:			0

Add

Once an expert creates their own evaluation, the individual evaluations of the other experts will be visible.

Reviewing the Assessments

To review the evaluations by overall points and the various criteria, click on the appropriate filter.

By "Footprint":

By "Points":

Proposing Projects

Now that ideas have been assessed, those worthy of implementation need to be proposed as projects.

Viewing Project Proposals

Project proposals in their various phases can be viewed in the projects area on the main lab page. Launched Projects are projects that have passed the various internal business case gates and have had project communities created to support the execution process. Proposed Projects are still being analyzed and evaluated, and have an initial status of "Under Review". Projects that get reviewed and are considered not viable are marked accordingly.

Creating a Project Proposal

To propose a project within an Innovation Lab, click on Propose. When creating the project proposal specify:

- Title

- Description

- Owner (defaults to creator)

- Corporate Objectives

After the project proposal has been created, it will be listed under Proposed Projects and there will be an activity in the stream to reflect that action. Clicking on the title in the stream brings up the the project proposal details.

The title, description, and owner may be modified by clicking on Edit. The project may deleted in the future by clicking on Delete. Corporate Objectives may be changed at any time by editing the project proposal form. Content that is project-specific can be added, not unlike how Lab-related content is added (described above). The commenting area is valuable for the Experts and Sponsors as they flush out the Project Proposal details. These comments also appear in the Lab activity stream. Note that the initial status of the project proposal is "Under Review."
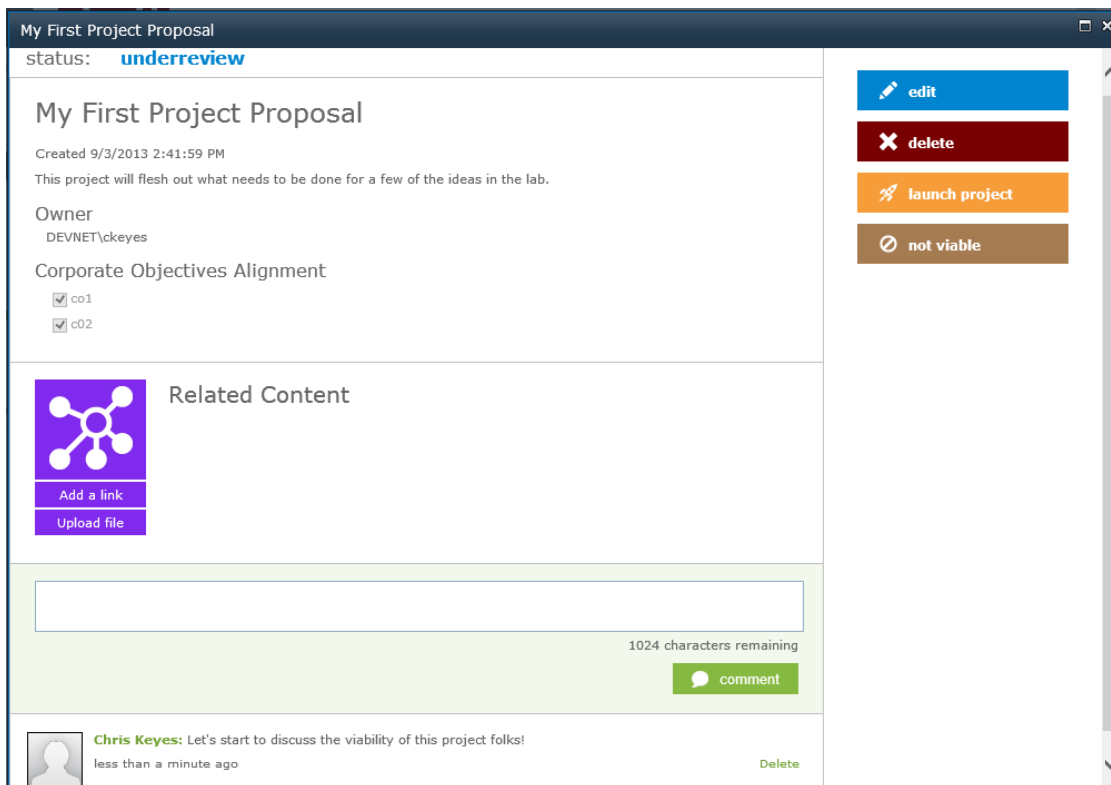
Marking Proposals as Not Viable and Reactivating

If a project is not considered viable then the status can be changed accordingly by clicking on Not Viable in the project proposal form. Projects marked as Not Viable will appear in the Projects area if the View All option is selected. Projects marked as "Not Viable" may be reactivated in the future by clicking on the project proposal link and clicking Reactivate.

Launching a Project and Creating Project communities

Once a project has been considered viable and is ready to be launched, the project proposal may be marked accordingly and have a project community created to support the execution of the project.

The project community is a place to support the project implementation. While the implementation of the project may use a wide variety of project management tools to manage the appropriate resources and deliverables, the community can support the conversations and collaboration among project team members as well as some of the project management artifacts (e.g. documents, links etc.). A project community also helps provide continuity with the overall innovation process as it is linked to the Labs, Project Proposals, and ideas that inspired it, as well as the Corporate Objectives it aligns with.

Let's look at a sample project containing related content that is ready to be launched:

Revamp Prospectus Production and Delivery to Electronic Format

status: **under review**

Revamp Prospectus Production and Delivery to Electronic Format

Created 10/14/2013 12:18:53 PM

We would like to determine the cost benefit analysis, SEC and FINRA regulations, and customer perception of using PDF, email links, and/or CD-ROM delivery options for our prospectuses. Logistically, the new delivery methods will reduce paper consumption and logistics costs due to the reduction (or elimination) of hard copy prospectuses (paper, printing, shipping, gas, etc.).

Owner
build manager

Corporate Objectives Alignment
- Reduce Waste by 10%

Related Content

Add a link
Upload file

Files
- Best Practices for Electronic Reproduction of Financial Collateral.docx   Remove

Links
- Security Exchange Commision   Remove

1024 characters remaining

💬 comment

✏ edit
✖ delete
🚀 launch project
⊘ not viable

To launch the Project (as far as the application is concerned), click on Launch Project. The user has the option to create a new project or launch into an existing one.   When creating a new one, the parent URL is the lab and the kind of community template must be specified.

Launch project

Choose how to launch the project: ⦿ New Site ◯ Existing Site

Project Site Url

http://halhome/InnovationDemo/

Web Template :

Team Site

Launch

Clicking on create will start the process for creating the site. This example is for a public Sitrion Social community:

This is what the community itself looks like after clicking on Ok (note that other Sitrion Social features can be enabled like Video Stream and Enrich to help manage the project):

Note that the project community is created with the key meta-data from the project proposal including the description, the corporate objectives it aligns too and the related content. There is also a link to the back to the originating lab.

Project Details

Innovation lab : Environmental Efficiency In...

Description

We would like to determine the cost benefit analysis, SEC and FINRA regulations, and customer perception of using PDF, email links, and/or CD-ROM delivery options for our prospectuses. Logistically, the new delivery methods will reduce paper consumption and logistics costs due to the reduction (or elimination) of hard copy prospectuses (paper, printing, shipping, gas, etc.).

Corporate Objectives Alignment

- Reduce Waste by 10%

Edit

Project Documents

Type	Name	☐ Modified By
📄	Best Practices for Electronic Reproduction of Financial Collateral ✚ NEW	build manager

Project Links
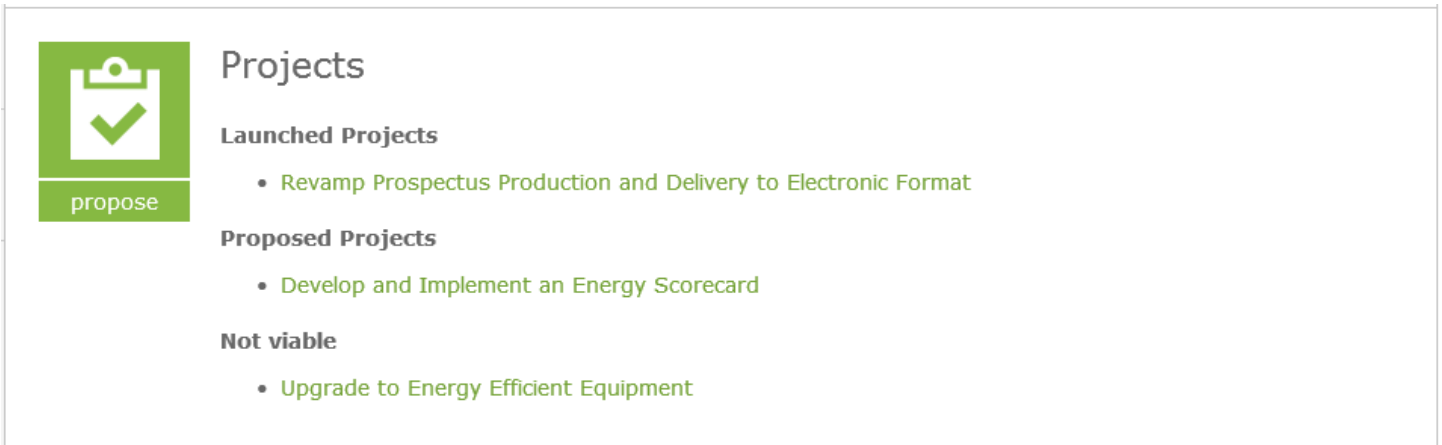
▫ Security Exchange Commision

✚ Add new link

Community Members

This community has no members

This project will then display as a Launched Project on the main Lab page with the other projects. Clicking on the launched project takes the user to the project site. The screen shot below also shows a project that has been marked as Not Viable.

Projects

Launched Projects

- Revamp Prospectus Production and Delivery to Electronic Format
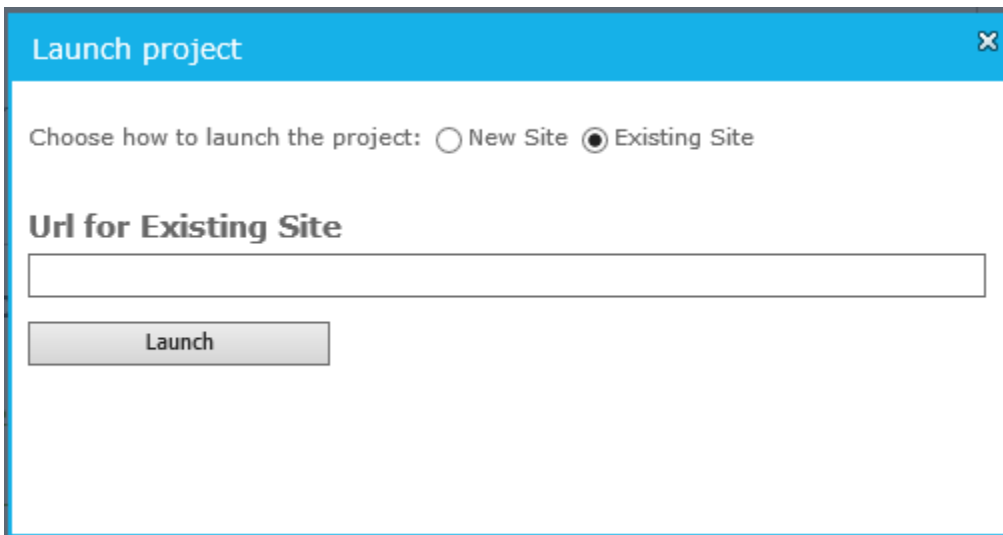
Proposed Projects

- Develop and Implement an Energy Scorecard

Not viable

- Upgrade to Energy Efficient Equipment

Selecting "Existing Site" pops up a panel prompting you for a URL as seen below. This will follow a similar process when creating a project community from scratch in that a) all documents, links and objectives will be exported to the project site and b) the project proposal will be linked to the specified site.

Launch project

Choose how to launch the project: ○ New Site ● Existing Site

Url for Existing Site

[   ]

[Launch]

Administering the Process

Adding Corporate Objectives

One of the main goals throughout the innovation process is to make sure innovation projects are allocated and tracked back to corporate objectives. To setup a corporate objective, click on Innovation Solution Administration in the personal pull-down menu in the top tight corner in SharePoint.
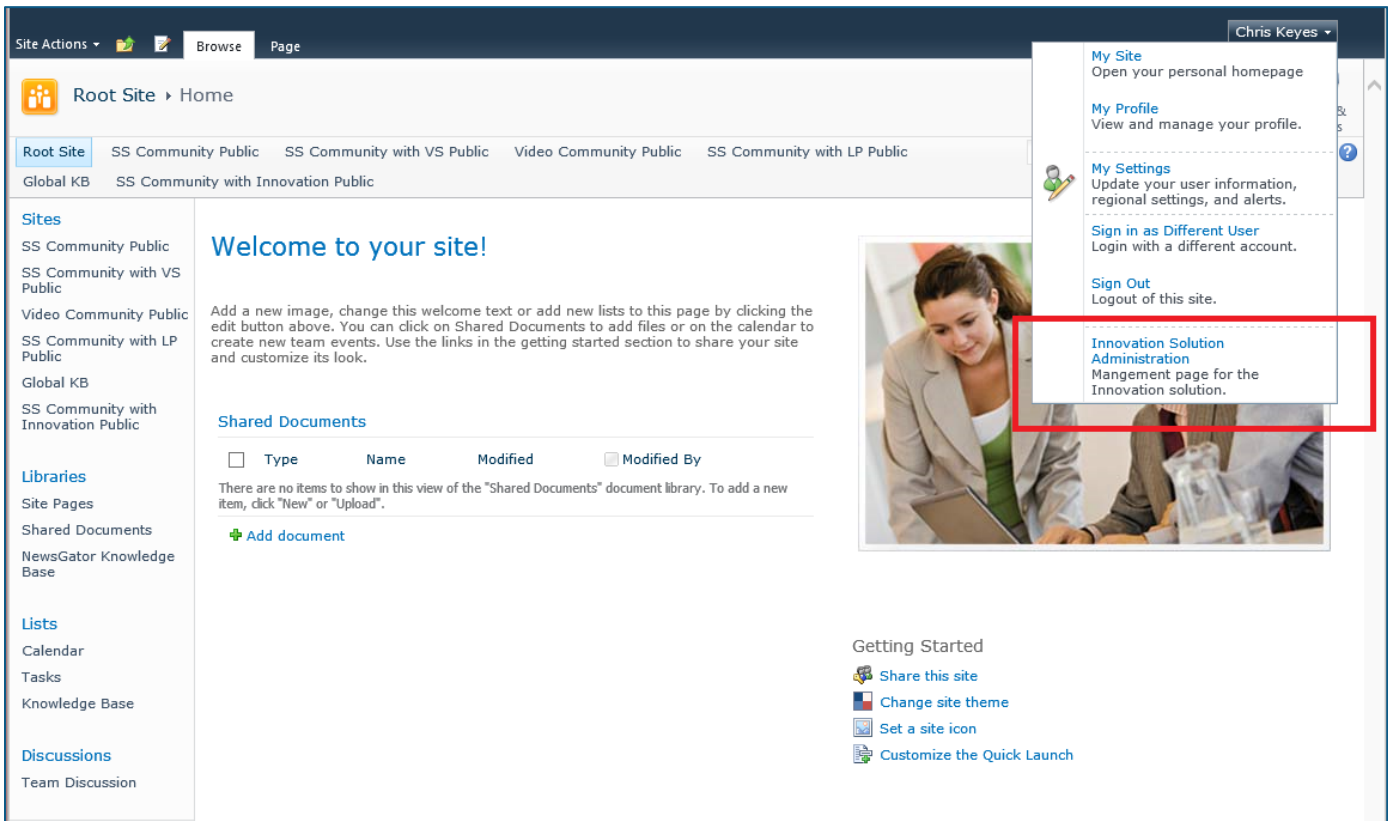
Click on the Manage Corporate Objectives link under Innovation Settings:
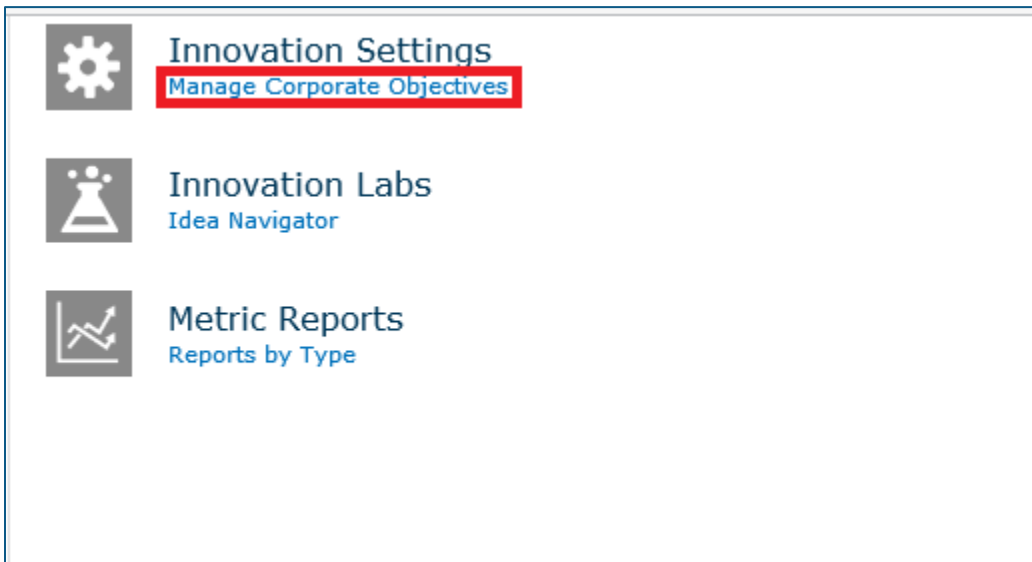
To add a new Corporate Objective, type in the text entry area and click Add. Editing and deleting Corporate Objectives are also supported, as well as reordering them using up and down arrows.
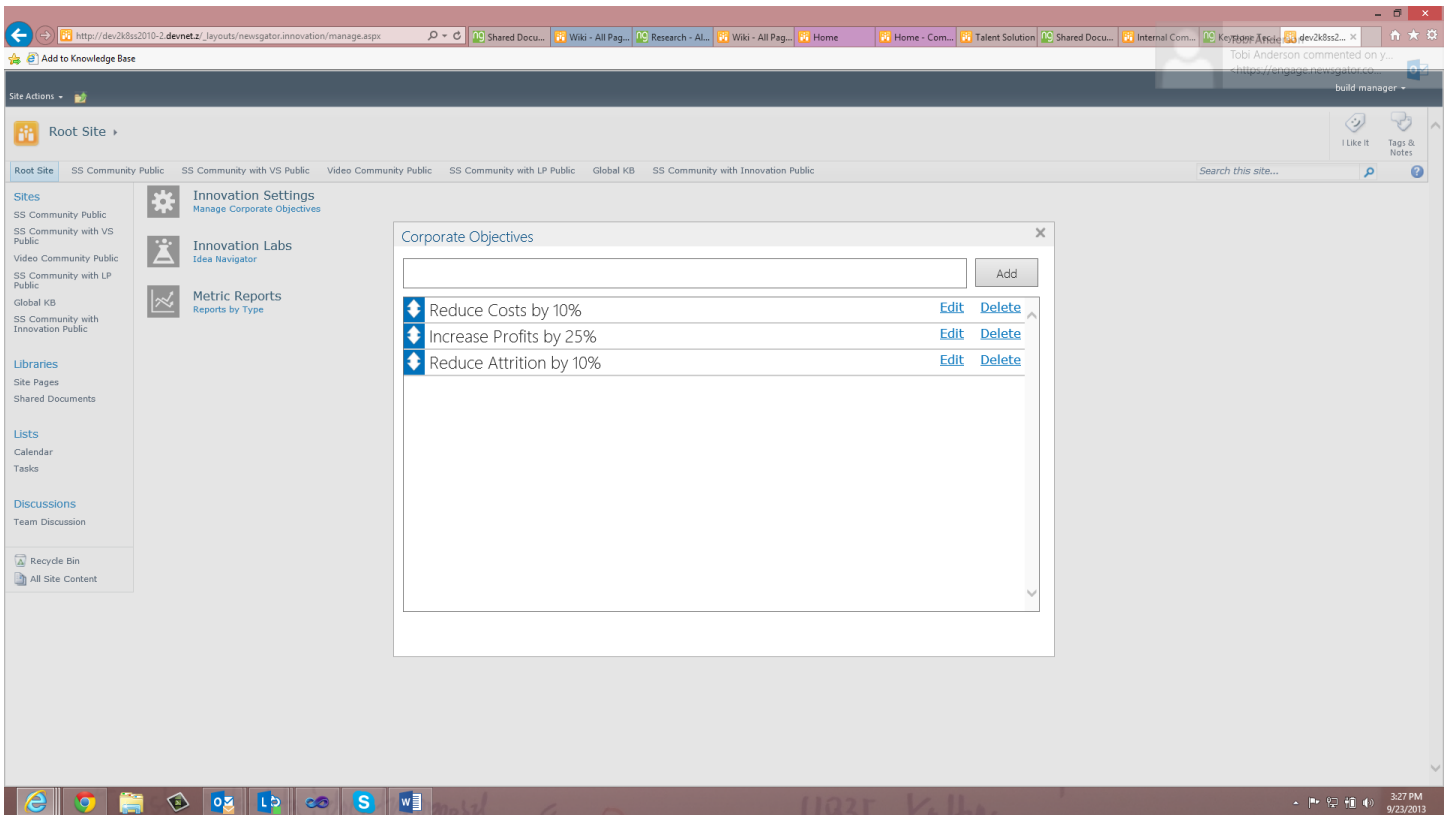
Dashboard Reports

The solution supplies a set of dashboard reports to help track and measure the innovation process.

Clicking on Reports in the Innovation Solution Administration provides the following data:

- Idea activity by Month: Ideas created by month, ideas by status by month
- Campaign activity by Month: New campaigns created by month by type of campaign
- Innovation Labs and Corporate Objectives Alignment by Month : New labs per month, total corporate objective alignment per month
- Project Proposals by Month: New project proposals created by month, project proposals by state with AVG time-to-state for project proposals created that month
- Project Proposals and Corporate Objective Alignment by Month : New project proposals per month, total corporate objective alignment per month
- Project Communities and Corporate Objective Alignment by Month: New project communities per month, total corporate objective alignment per month

Here is what the reports look like:

idea activity by month
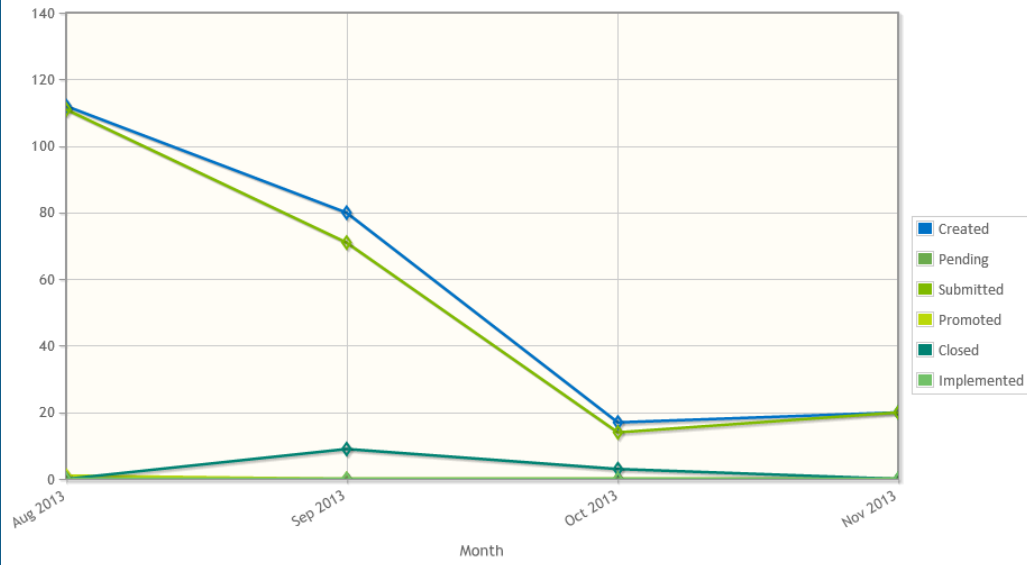
year	month	created	current status of created ideas				
			pending	submitted	promoted	closed	implemented
2013	August	112	0	111	1	0	0
2013	September	80	0	71	0	9	0
2013	October	17	0	14	0	3	0

campaign activity by month
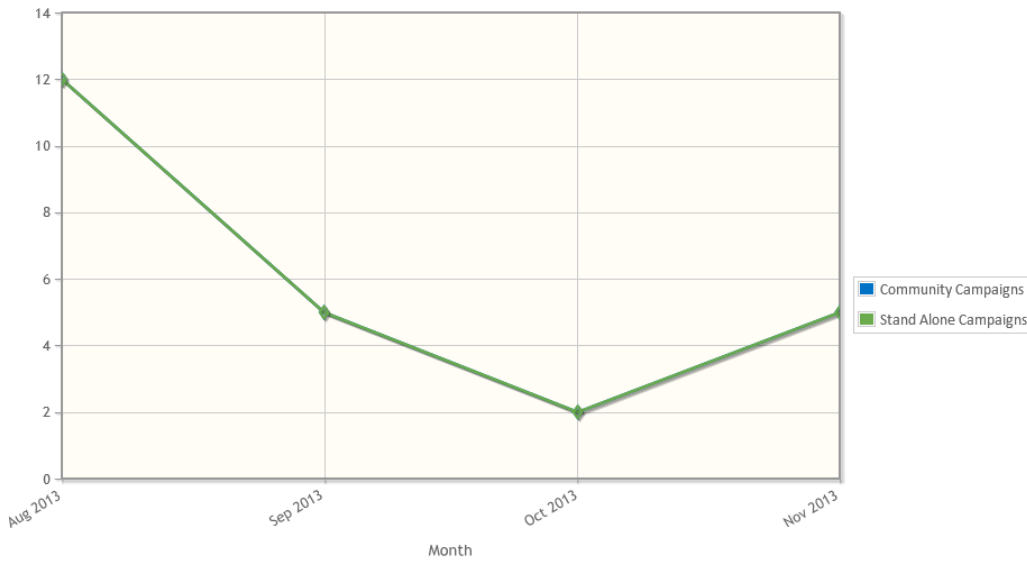
year	month	stand alone campaigns	community campaigns
2013	August	12	12
2013	September	5	5
2013	October	2	2
2013	November	5	5

innovation labs and corporate objectives alignment by month

year	month	created	corporate objectives							
			reduce waste by 10%	be cool!	increase productivity by 30%	increase brand affinity by 10%	increase brand affinity by 10%	reduce costs by 15%	decrease costs by 15%	reduce waste by 10%
2013	August	2	1	0	0	0	0	1	1	0
2013	September	0	0	0	0	0	0	0	0	0
2013	October	1	0	0	0	0	0	0	0	0

project proposal status by month
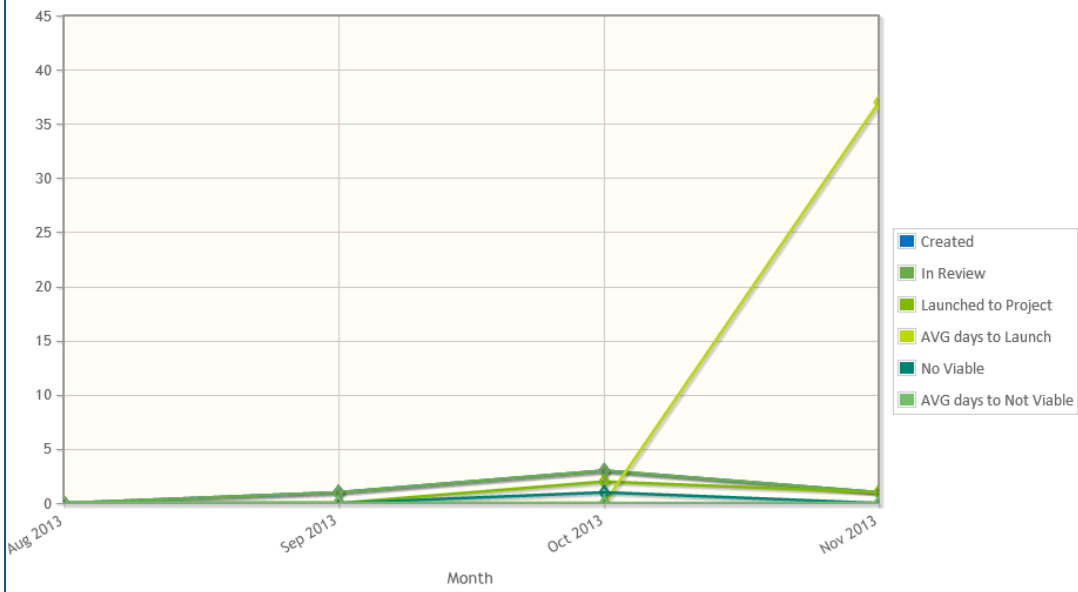
year	month	created	in review	launched to project	avg days to launch	no viable	avg days to not viable
2013	August	0	0	0	0	0	0
2013	September	1	1	0	0	0	0
2013	October	6	3	2	0	1	0
2013	November	2	1	1	37	0	0

project proposals and corporate objective alignment by month

year	month	created	corporate objectives							
			reduce waste by 10%	be cool!	increase productivity by 30%	increase brand affinity by 10%	increase brand affinity by 10%	reduce costs by 15%	decrease costs by 15%	reduce waste by 10%
2013	August	0	0	0	0	0	0	0	0	0
2013	September	1	0	0	1	0	0	0	1	0
2013	October	3	3	0	0	0	1	3	0	0

project communities and corporate objective alignment by month

year	month	created	corporate objectives							
			reduce waste by 10%	be cool!	increase productivity by 30%	increase brand affinity by 10%	increase brand affinity by 10%	reduce costs by 15%	decrease costs by 15%	reduce waste by 10%
2013	August	0	0	0	0	0	0	0	0	0
2013	September	0	0	0	0	0	0	0	0	0
2013	October	2	2	0	0	0	1	2	0	0

Lab Roles and Permissions

This section summarizes the various lab roles and the associated permissions.   How the roles are defined are indicated by the footnotes. Any exceptions are also indicated by footnotes.

Roles	Function	Innov-ation Admin [1]	Site Owner [2]	Lab Manager [3]	Lab Sponsor [3]	Lab Expert [3]	Lab Member [4]	Lab Visitor
Admin								
	Add Corporate Objectives	Y						
	View Metrics	Y						
	Change Innovation Settings	Y						
Lab								
	Create Labs*							
	Delete Lab*							
	Edit lab properties		Y	Y	Y			
	Assign members to roles		Y	Y				
	Relate Ideas	Y	Y	Y	Y	Y		
	Unrelate Ideas		Y	Y	Y			
	Project Proposals							
	Create*		Y	Y	Y	Y		
	Edit*		Y	Y	Y	Y		
	Delete*		Y	Y	Y			
	Mark Non Viable*		Y	Y	Y			
	Reactivate*		Y	Y	Y			
	Launch Project[5]		Y	Y	Y			
	Add/Delete Related Content*		Y	Y	Y	Y	Y	
	Comment	Y	Y	Y	Y	Y	Y	Y
	In See All members list			Y	Y	Y	Y	
	Expert icon over profile pic					Y		
	Add (lab) related content*	Y	Y	Y	Y	Y	Y	Y
	Delete (lab) related content*		Y	Y	Y	Y		
	Activity stream participation	Y	Y	Y	Y	Y	Y	Y

[1] Configured at Service app

[2] SharePoint Permission (Manage Web Site)

[3] Role configured inside lab

[4] self-join i.e. follow lab

[5] currently requires Manage Web Site, Manage List, Create Sub-sites

* with corresponding SharePoint list permissions

<table>
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FIND MORE INFORMATION:

NewsGator Sitrion Social v5.5 User Guide

NewsGator Sitrion Social v5.5 Release Notes

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Sitrion Social Spotlight Module

Overview

The Spotlight module for Sitrion Social provides a pair of related features that both count user actions in the system, then use this user behavior data to provide additional value to users. Spotlight is an optional module which integrates tightly with, and requires the functionality of, the base Sitrion Social product.

The basic concept is illustrated below. Data is collected by Sitrion Social and can optionally be brought in from other systems. The set of data is scored to produce ratings of how strongly a user is connected to a particular term, which are used to illuminate skills and expertise (the Expertise functionality). The data is also used to determine how a user is performing relative to set of behavioral goals, and to reward the reaching of those goals via badges and listing on a public leaderboard (the Recognition functionality).
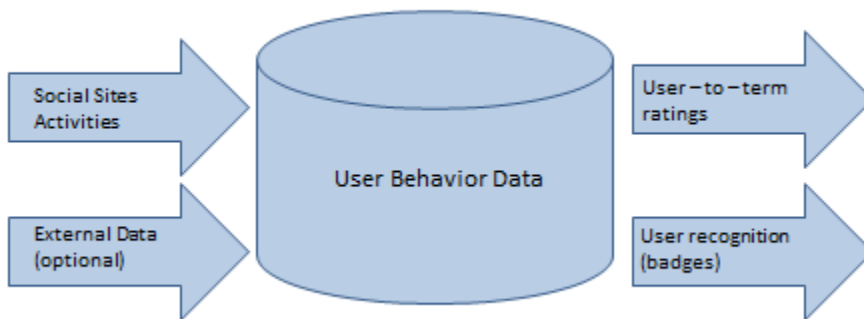
☞	FIND MORE INFORMATION:
	Sitrion Social v5.5 User Guide

Granting administrative access

Access to administering community badges is available to individual community administrators, via the Admin tab in the community.

Access to systemwide Spotlight administration is granted in SharePoint Central Administration. Highlight **NewsGator Social Platform Services** and click **Administrators** in the ribbon.
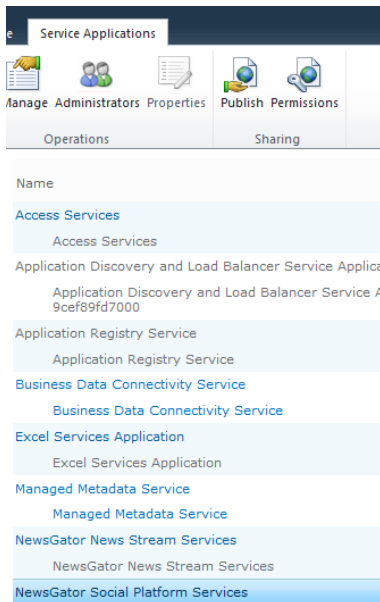
Your administrators will need to have the **Spotlight Administration** box checked.
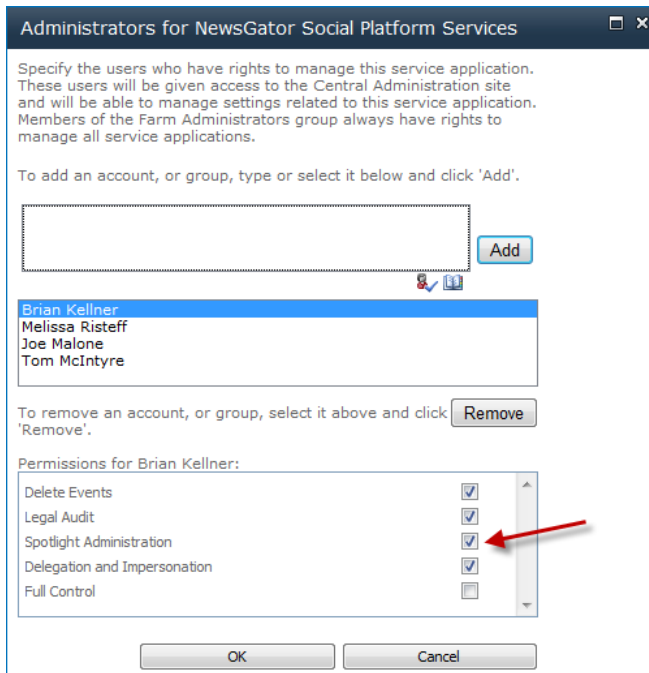
Rights required to change Expertise scoring

You will also want to ensure that the account used to run the Social Sites Managed Service Application has write rights to the SharePoint configuration database. Also, the person performing the recalculation of Expertise scores must be a farm administrator. Without these rights, the Recalculate functionality for the Expertise feature will not work. See **Recalculate every time you change the weights** below for details on the Recalculate functionality.

Navigation to the Spotlight administration site

Community administrators can navigate to their community's page for administration of Spotlight badges and badge rules by following the **Spotlight Administration** link on the Admin tab of any community:
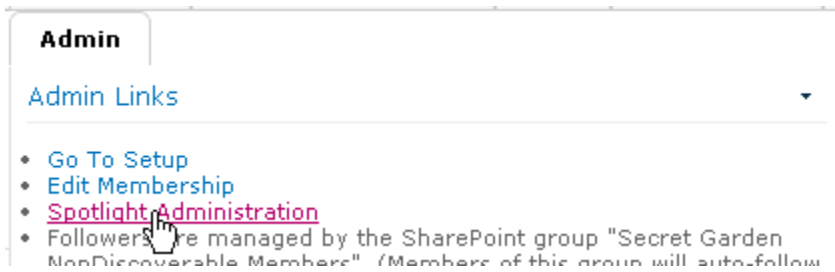
This opens an administration page which is a limited version of the global Spotlight Administration page:
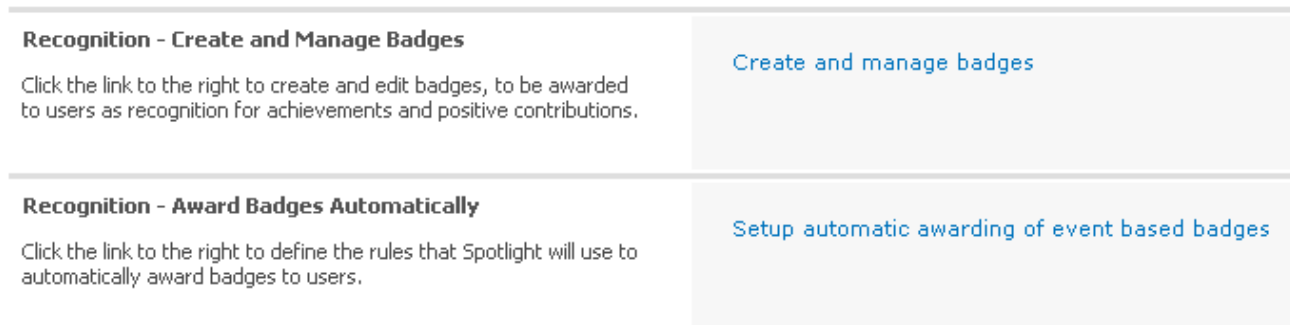
As for navigation to the global Spotlight management page, those upgrading from the 2.0 version of Sitrion Social with Spotlight should note that the method of navigating to that page has changed. This is thanks to a navigation option that was added to Sitrion Social to get to administrative screens more easily. Opening your personal menu from the top right of the ribbon shows a new option at the bottom:
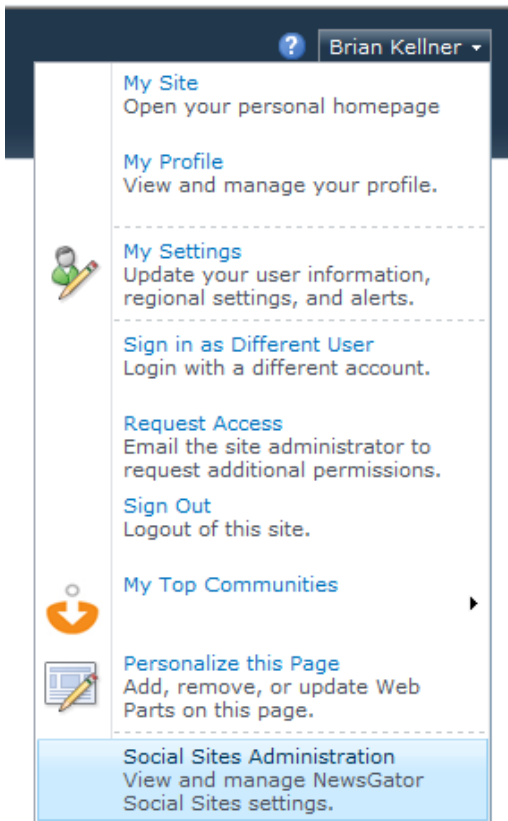
Clicking the "Social Sites Administration" option takes the user to a page that provides links to all the administration pages to which the user has access. If the user has been granted the Spotlight Administration permission as described above in the **Granting administrative access** section, they will see a **Spotlight Administration** link on this page that will take them to the Spotlight Management page.

Adding Spotlight web parts to the gallery

Once installed, Spotlight's end user web parts will not be available in the web part gallery for adding to the pages of any site collection. To add Spotlight web parts to the gallery of a particular site collection, activate the site collection feature called "NewsGator Spotlight Web Parts". (Site collection features are activated from the Site Actions menu by selecting Site Settings, clicking "Go to top-level Site Settings" if displayed, then clicking "Site Collection features".) When upgrading, you may need to deactivate and reactivate this feature to see the in the gallery those Spotlight web parts that are new in 3.1.

Expertise feature

The expertise feature has two major kinds of activities: administration and end-user discovery. The administrative actions configure the rules for the system and allow top-level reporting. The discovery behaviors represent users looking for strong connections between other users and areas of expertise, as represented by single- or multiple-word terms (these single- or multiple-word terms are referred to in the remainder of this document as "tags"). Upon discovering a connection between a user and an area of expertise, users typically have options for communiticating with the person on that topic.

Function and configurability of the expertise engine

Expertise score calculation

A user's expertise on a topic is represented as a score that user has for a particular tag. Things that can add to that score include profile properties, actions taken by the user, and actions taken by others on the user's content. Administrators can determine which specific properties and actions affect the score, and by how much.

The actions that are scored can even occur outside of SharePoint. Skills management, certification, knowledge repository, and project management are examples of possible systems that could contribute external scores. It is possible to drive expertise entirely from external inputs. To include an action that occurs outside of SharePoint, an administrator must set up an external input for that action. The external system must then indicate to Spotlight when an incidence of that action has occurred.

Profile properties that contribute to the expertise score

By default, three profile properties contribute to the expertise score: "Ask Me About", "Skills" and "Interests". Administrators can add other profile properties to this list, so long as those properties contain lists of text strings as their data. Because each profile property can only make one contribution to any particular user-tag connection score (or expertise score), these are weighted by default higher than actions, which can produce multiple contributions to a particular score.

Actions that contribute to the expertise score

There are two types of action: active and passive. Active actions are ones the user performs herself. These consist of "Microblogging" (creating a microblog post); "Questions" (asking a question); "Answer" (answering a question); "Comment"; and "Tag SharePoint content". Passive actions are actions others take on the user's content. These consist of "Marked Answer" (someone marked your question response as an answer), "Receive Like"; "Receive Comment", "Receive tag on your SharePoint content", "Your SharePoint content was rated".

For each of these, "Weight" indicates the amount by which a user's expertise score with a tag will be increased when that tag is involved with that action for that user. For example, if a user answers a question that has the hashtag #competition in it, the user will get points added to his score for the tag "competition". The amount of points added is equal to the weight for the "Answer" action (going by the picture below, this would be 20 points). The user will also get "Answer" action points on any hashtag the user includes in his own answer. They do not, however, get points against hashtags in other answers to the same question.

Weight changes apply retroactively

When Spotlight is first installed, the expertise engine begins functioning right away, counting numbers of occurrences of user actions from of a pre-determined list of action types. These counts are converted into user-tag connection scores (or expertise scores), using default weights on these action types. Occurrences of a tag within certain of a user's profile properties also add to the expertise score, based on default weights for these properties. The administrator can change these weights later, and have these new weights apply retroactively to events and properties that have already been counted by the expertise engine. The administrator must be a farm administrator to be able to do this.

Setting up and administering the Expertise feature

Specifying weights for expertise scores

To change the impact an action type or profile property has on user-tag expertise scores, find the **Expertise - Inputs and Weights** section in the Spotlight Management page, and click "Manage Expertise inputs and weights". You'll see a screen like the one pictured here:

All profile properties and actions that contribute to expertise scores are listed here, by their name and type of input. The "Weight" column shows the amount by which each occurrence of the associated action in connection with a tag increases the user's expertise score for that tag, or how many points the user gets for having the tag in their profile. To change this, click the Edit icon in the "Actions" column, and change the score using the dialog that pops up.

"Your SharePoint content was rated" is scored a little differently than the others. Contributions that ratings on your tagged item makes to your score for that tag do not accumulate. Instead the ratings are averaged, and this average is multiplied by the weight to give the overall contribution that all the ratings on that item collectively make to your score for that tag. For example, you create a document and tag it with "Analysis". Somebody then rates that document with a rating of 5. Your expertise score for the tag "Analysis" is therefore increase by the average rating, 5, times the weight, 3, or 5*3=15. Now someone else rates it a 3. The average rating drops to 4 for this document, and the contribution of 15 is reduced to 4*3=12. So your expertise score for "Analysis" actually drops because of the second rating.

Disabling an input

Any input can be effectively disabled by setting its weight to zero. When this is done, the expertise engine will still count the events that occur for that input, so that if you later decide the input should be included after all, it will be as if you never disabled it and the scores were counted the whole time.

To disable a profile property, you can also click the X icon to the far right of its listing in the **Expertise Inputs and Weights** page. Its listing will go away, but can later be brought back by following the instructions in the **Defining new inputs – profile properties** section, below. Since profile properties' contributions to expertise scores are not history-dependent, it will be as if these were never disabled.

Recalculate every time you change the weights

Anytime you change the weights of inputs, these weights can be applied retroactively to all events that were counted in the past (not just applying to future events). To do so, click the **Recalculate** button at the bottom of the **Expertise Inputs and Weights** page.

Before you do so, make sure of two things:

1. You must be a farm administrator

2. The Social Sites Managed Service Application has write permissions (via the application pool identity) to the SharePoint configuration database

If either of these things are not true when you click Recalculate, the recalculation will fail.

Defining new inputs – profile properties

Only profile properties of a certain type can contribute to an expertise score – they must consist of a text item or a list of text items. Each text item in the list will be treated as a tag connected to the user. Examples of such properties that are not by default part of the expertise engine include "Past Projects". To have one of these become a contributor to expertise scores, go to the **Expertise - Inputs and Weights** section in the Spotlight Management page, and click "Manage Expertise inputs and weights". In the **Add Expertise Scoring Input** section, click "Add Expertise Scoring Input". Set Type to "Profile Property". Provide the internal name of the property. (To discover the internal name of the property, in Central Administration go to Manage Service Applications, click on User Profile Service application, click Manage User Properties. Find the name of the property you want to in the list, click on it, and choose Edit from the context menu that appears. At the top are "Name" and "Display Name" – "Name" is the internal name.) Provide a default weight, and optionally translate into other languages.

Defining new inputs – external actions

One cannot add to the list of internal actions (actions within SharePoint) that can contribute to expertise scores. All the internal actions available for scoring are already listed on the "Manage Expertise inputs and weights" page. One can, however, call Sitrion Social from an external system to have actions occurring there counted toward expertise scores. Before you can make the call from the external system, you need to identify in Sitrion Social the types of actions that can occur in the external system. This amounts to providing an identifier, a descriptive name, a description, and a scoring weight.

To provide these, find the **Expertise - Inputs and Weights** section in the Spotlight Management page, and click "Manage Expertise inputs and weights". In the **Add Expertise Scoring Input** section, click "Add Expertise Scoring Input". Set Type to "External Activity". Provide an internal name of the property – this can be anything you like. Provide a default weight, and optionally translate into other languages.

Spotlight is now prepared for an external system to tell it when this event has occurred on the external system, who should get points for it, and what tag they should get points for. This is done on the external system by making a call to the `AddUserScore` method of a `SocialSpotlightClient` object. A sample call:

```
ObjVar.AddUserScore(accountName, elementInternalName, tag, itemUrl, actual, count);
```

In this:

- `accountName` identifies the user who should be scored
- `elementInternalName` identifies the event type (as defined by you earlier in this section) that occurred on the external system

- tag indicates the associated tag
- itemUrl is an object that was acted on in this event
- actual takes the value TRUE to indicate the next parameter should become the actual total count for this person-event pair, and takes the value FALSE to indicate the count for this person-event pair should only be incremented
- count is the new amount or increment amount, depending on the value of the previous parameter.

Below is a sample .Net application that uses this API, and can be run from the console to allow testing of the external input functionality with Expertise.

```csharp
class Program
{
    static void Main(string[] args)
    {
        if (args.Length < 6)
        {
            Console.WriteLine("Usage: SpotlightTest <accountName> <elementInternalName> <tag> <itemUrl> <actual> <count>");
            return;
        }

        string accountName = args[0];
        string elementInternalName = args[1];
        string tag = args[2];
        string itemUrl = args[3];
        string actualString = args[4];
        string countString = args[5];

        int count = 0;
        if (!int.TryParse(countString, out count))
        {
            Console.WriteLine("The count for the score must be an integer: {0}", countString);
            return;
        }

        bool actual = false;
        if (!bool.TryParse(actualString, out actual))
        {
            Console.WriteLine("Actual needs to be true/false: {0}", actualString);
            return;
        }

        try
        {
            SocialSpotlightClient client = new SocialSpotlightClient();
            client.AddUserScore(accountName, elementInternalName, tag, itemUrl, actual, count);
        }
        catch (Exception ex)
        {
            Console.WriteLine("Error adding score: {0}", ex.Message);
        }
    }
}
```

Endorsements

As of the 5.2 release, endorsements is a new feature in Spotlight that lets users point out skills and expertise in other users.

The primary point of user experience is the new endorsements web part.
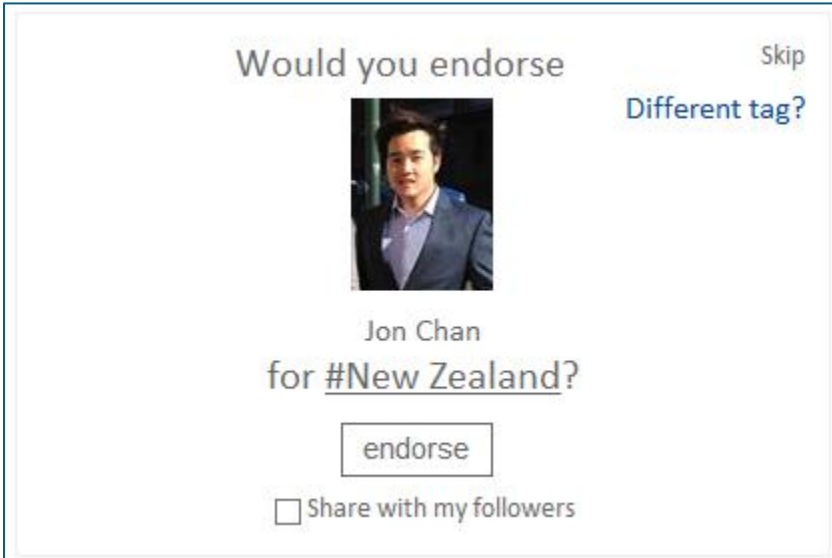
When a user clicks the "endorse" button, a couple of actions always happen. First, the user who is being endorsed gets a post in his or her stream saying that they were endorsed for that tag. Second, the weighting specified in the Expertise scoring is applied to the endorsed user for that tag (in this example, Jon gets +10 points for "New Zealand" expertise).

Expertise Inputs and Weights

Available Weights

Use the controls to the right to change the weights for the various scoring elements.

Name	Type	Weight	Actions
Ask Me About	Profile Property	25	
Skills	Profile Property	15	
Interests	Profile Property	10	
Microblogging	Internal Activity	7	
Questions	Internal Activity	5	
Answer	Internal Activity	20	
Marked Answer	Internal Activity	30	
Receive Like	Internal Activity	1	
Comment	Internal Activity	4	
Receive Comment	Internal Activity	4	
Tag SharePoint content	Internal Activity	5	
Receive tag on your SharePoint content	Internal Activity	5	
Your SharePoint content was rated	Internal Activity	3	
Endorsements	Internal Activity	10	

If the endorsing user clicks the, "Share with my followers" checkbox, a microblog is created in the activity stream which is visible to everyone who follows the endorser.

The person to display in the web part is randomly selected from the colleagues of the viewing user. The suggested tag to endorse is selected by first looking at the tags the displayed person has put in her 'ask me about' field in her profile. If a tag cannot be found there, the code looks at tags this user already has scores on in Spotlight. If nothing is found this way, the code then looks at all tags in Spotlight to find a suggested tag for endorsing.

Note that viewing users can click the "skip" link to have the system suggest a new user and tag (and a new user and tag are automatically displayed after any endorsement). Also, users can click "Different tag?" to get a text box which can be filtered to find a tag you for which you'd like to endorse the displayed user.

Viewing administrative reports, and hiding users or tags in expertise

A collection of reports are available to Spotlight administrators that let you view the highest scoring users for a given tag, the top tag for each user, that let you hide undesired tags and later restore them, and hide users from displaying in expertise output, and later restore them.

Go to the **Reports** section in the Spotlight Management page, and click "Admin reports on Expertise". This brings you to a page with a dropdown that says "Select A Report", and containing four report selections. An additional report, the User Detail report, is not selectable here, but can be navigated to by clicking on the name of any user that you see listed in any of the other reports.

Tags report and Deleted Tags report

The Tags Report and the Deleted Tags Report show all tags, ordered by highest individual expertise score. The Tags Report shows only tags that have not been deleted, and the Deleted Tags Report shows only tags that have been deleted. Any tag may be deleted from the Tags Report. This allows admins to eliminate tags that may get created but

have no business value (even if strong user scores are developed against them). These can be restored later from the Deleted Tags Report. As long as they're deleted, no points will accumulate for them, and they won't show in any end-user web part.

Both reports have paging, with adjustable page sizes via the "Items Per Page" setting. You can also use the search box to filter down to only those tags that start with the entered characters. An [X] button appears next to the search box, allowing you to clear your filter.

NOTE: In later releases, the score column was removed from the Tags report for performance reasons.

Users report and Deleted Users report

The other admin reports, the Users Report and the Deleted Users Report, show all users who have expertise scores. The Users Report shows only users that have not been deleted from expertise scoring, and the Deleted Users Report shows only users that have been deleted from expertise scoring. They are ordered by the highest single expertise score that each person has attained. Any user may be deleted from expertise scoring via the Users report. This allows eliminating records for users who are no longer with the organization. The user's expertise scores may be restored later by the Delete Users report, as they were at the time the user was deleted from expertise scoring.

Both reports have paging, with adjustable page sizes via the "Items Per Page" setting. You can also use the search box to filter down to only those users whose names start with the entered characters. An [X] button appears next to the search box, allowing you to clear your filter.

User Detail report

To get to an expertise detail report for any particular user, click that user's name from any of the other reports. This report shows all that user's expertise scores, ordered by the tags with the highest scores for that user.

Finding users and topics using the expertise feature

Three web parts provide users the ability to search for users based on their areas of expertise, or to discover what a particular user's interests or areas of expertise are. These are available under the NewsGator Spotlight Web Parts category when adding web parts to any page. They are:

- Expertise Browser
- Expertise Search
- Areas of Expertise

Expertise Browser web part

The Expertise Browser web part now comes in two versions: the original, a Silverlight web part that requires users to have Silverlight 4 or higher to use; and the new HTML5 version, with no such Silverlight requirement, but that does require a browser that has HTML5 support to have full functionality. Only the HTML5 version is now available in the web part gallery for deployment; however those with the Silverlight version installed will find that it works the same as before.

The Expertise Browser web part allows users to navigate through the expertise data in an unstructured pattern. It requires extra steps to deploy properly - see **Installing the Expertise Browser Web Part** under **Setting Up Spotlight**, above, for deployment instructions.

The view begins with the top 50 highest scoring tags in the system arranged alphabetically and sized by overall score.

2010   Accenture   Administration   adoption
Announcements   apple   Bank of America
blackberry   blum   Bravo   Chatter   cisco   citi   Cloud Computing
collaboration   communities   Community Management
competition   Connections   Customer   Deloitte   Demo
e 2.0   e2.0   e20   e2conf   easteregg   enterprise 2.0
europe   Events   facebook   FeedDemon   forrester   Gartner
google   government   hashtags   I like it   IBM   Ideas   Innovation
intel   ipad   iPhone   isaac   jive   Knowledge Explorer
knowledge management   Links   marketing
microblogging   Microsoft   Mobile
New Employee Announcements   News   newsgator
Newspapers   NGES   NGES 2.2   NGES 2.3   NGES 3.0
Pictures   Product Behavior   product management
products   Project Management   raindrops   Raytheon
Research   ROI   RSS   SaaS   sales   screenshots

Clicking one of these tags creates a view centered on that tag with up to ten users arrayed around it (as pictured on the left, below). User image distance from the tag is inversely proportional to their score (the highest scoring users are closest to the tag).
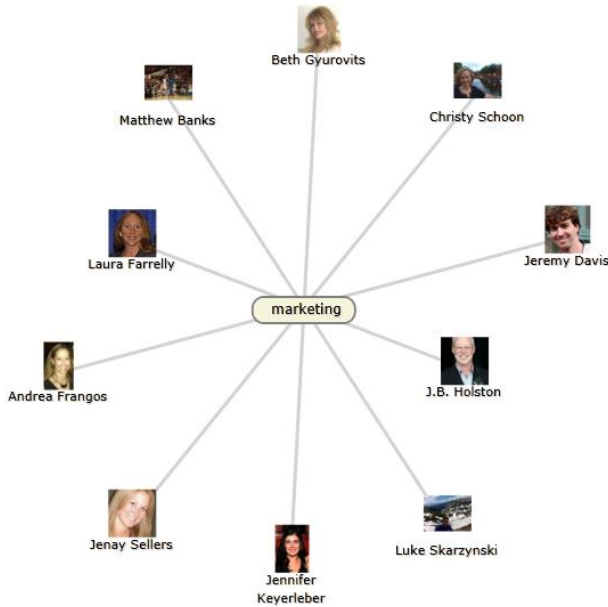
Clicking on any user image in this view re-centers the view on that user, with up to ten of that user's highest scored tags displayed around them (as pictured on the right, above). As is done in the tag-centered view, the highest scoring tags for that person are displayed nearest to the person. Clicking any tag will re-center the view on that tag (left, above). Proceeding this way, you can continue switching between tag-centered and user-centered views.

This can be an effective way to find a person who has expertise on a particular topic. When you have done so, it will be natural to want to ask that person a question. You can easily do so from either view. Just move your mouse pointer over the topic you want to ask about (when in the person-centered view), or over the person you want to ask (when in the tag-centered view). In the former case (pictured below right), you'll see a popup that allows you to ask that person a question about the topic represented by the tag by just typing your question and clicking **Post**. You don't need to include the person's @ target, nor the topic's hashtag: these are both added automatically after you click Post. In the latter case, (pictured below left) you'll see "mini profile" card popup. Near the bottom of the card will be a link that brings up the same popup for asking a question. In the example pictured, the link text is "Ask Christy Schoon a question about Social Computing"; this will vary depending on the person and topic selected.
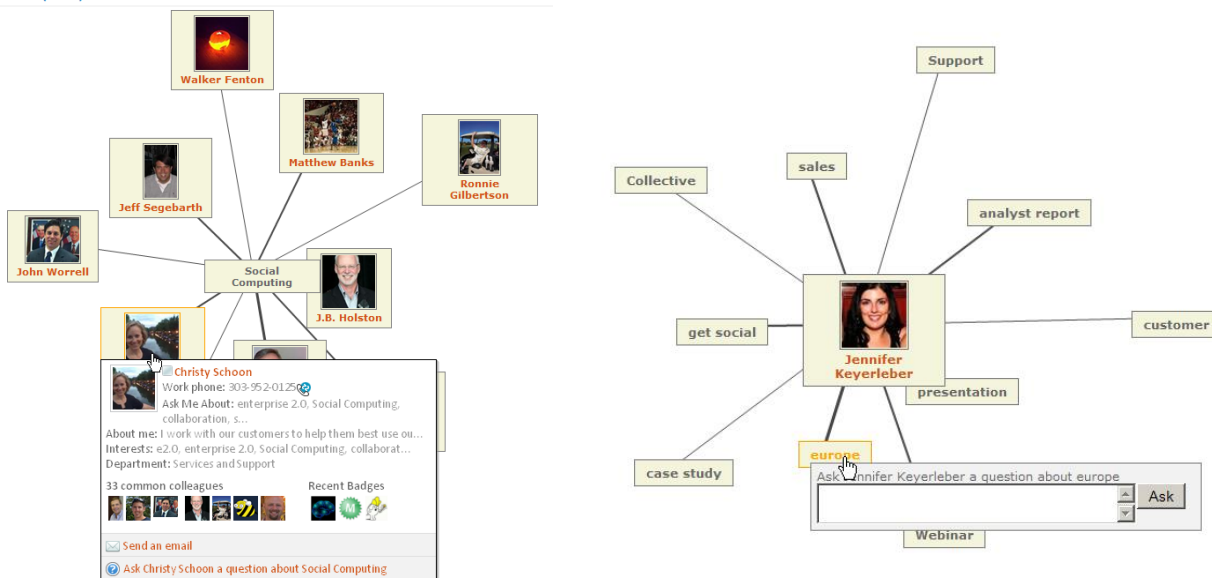
This same mini profile card provides other actions to the viewer. Clicking on the user's name at the top takes you to the full profile page of that person. Clicking on the "Send an email" text near the bottom opens a window for composing an email to that person.

Expertise Search web part

Not all organizations have Silverlight deployed. In addition, some use cases require more focused querying. We need to provide a search interface (either a dedicated page or flexible web parts) that allows for two key search cases:

- Tag-based search (with one or two tags)
- User-based search

The Tag-based search is on a tab titled "Search by tag", and has two text entry boxes. These text boxes support auto-complete so that as a user begins typing a tag, all matching tags in the score database are displayed, and one can be chosen from the options. If only a single tag entry box is used, the search returns all users with a connection to that tag. The users are ordered by their expertise score for that tag, though the scores are not shown. If two tags are entered on the search page, the results show all users (and only those users) who have a score against both of these tags. This list should be ordered by the sum of each user's two tag scores.

Each person shown in these results will have a checkbox next to his or her name. The viewing user can select up to three of the people displayed in the results and click "Compare" to see a side-by-side comparison of the users and their top twenty scoring tag associations (ordered from highest scoring tag to lowest). The goal of this view is to allow someone to compare potential people across multiple tags (e.g. to understand if the person with the strongest connection to a tag is also strong across related areas or more distributed than another person). From this side-by-side view, clicking the person's name will take you to their profile page.

The User-based search is much like the admin report except it does not display the actual score for the person's top tag and it does not provide the delete option. Enter any text string and click the search icon to see all users whose name contains that string anywhere. Each matching user will be displayed with his or her top tag, and clicking on the user will show their top twenty tags, with the highest at the top.

Areas of Expertise web part

The Areas of Expertise web part is intended for display on users' public profile pages. It lists the tags that the user has the highest expertise scores for, but no more than ten of them. These are displayed with the best matches at the top.

Very often this web part will be displayed directly adjacent to the SharePoint "Ask Me About" web part on the user's profile page, and when Spotlight is first installed the lists of tags displayed in these two web parts will usually look

very similar. However, over time, the tags in the Areas of Expertise web part will more reflect the user's actual use of the system, and can therefore give a better reflection of what subjects the user is actually engaged in and knows a lot about.

This difference will be of value to visitors to the page, in giving an even better sense of who the user is and/or what role they functionally play in the organization. It can be additionally valuable to the user visiting his own profile page, for re-evaluating the self-assessments he did when filling out his My Interests and Ask Me About profile properties. A user visiting his own profile page will therefore see the message "Click a tag to manage" in this web part. Clicking one of his areas of expertise will show a popup menu with up to three options, as appropriate:
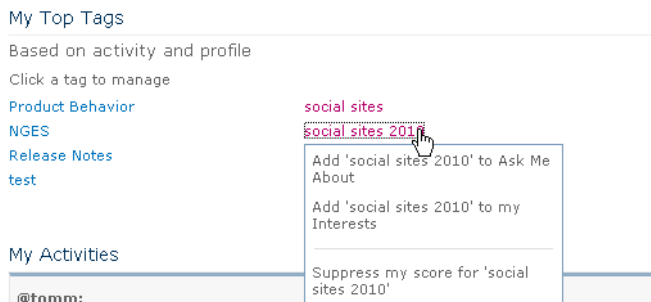
- Add to my Ask Me About. This adds the tag to the Ask Me About list in the user's SharePoint profile. This will let others find the user more easily in People Search.
- Add to my My Interests. This adds the tag to the My Interests list in the user's SharePoint profile. This will let others find the user more easily in People Search.
- Suppress my score for this tag. This will remove your score for this tag. Only do this if you think the tag does not relate to you. This actually hides your score for the tag instead of deleting it, so the tag won't return as an area of expertise for you based on your future use of the system.

The user will also see these tags listed among the recommendations for adding to Ask Me About and My Interests when editing their SharePoint profile.

Visitors to another user's profile page will not see these options. Instead, when a visitor clicks on one of these tags, they will see a popup that allows them to ask that person a question about the topic represented by the tag, by just typing their question and clicking **Post** (see picture below). They don't need to include the person's @ target, nor the topic's hashtag: these are both added automatically after they click Post.
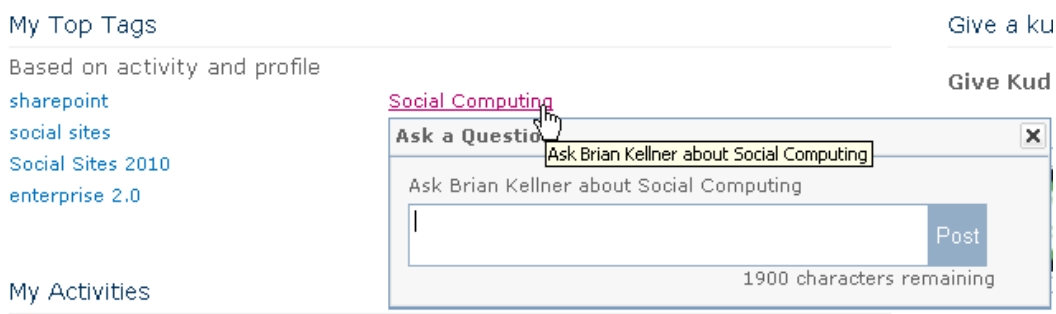
Recognition feature

The Recognition feature rewards desired user behavior or recognizes special milestones with a badge. Different badges reward different behaviors or recognize different milestones.

Setting up and administering

See **Setting up Spotlight** at the beginning of this document for instructions on getting the Recognition feature up and running. When that is complete, go to the Spotlight Management page to take your next steps.

Similar to the Expertise feature, administration of Recognition relies heavily on defining inputs on which to score user behavior, and can involve both internal and external inputs.

Creating a new badge

A badge's display elements are defined separately from any rules that would automatically award the badge. This is to allow flexibility in re-using badges or restarting the accumulation of points toward a badge, which can be done by simply creating a new rule for awarding the same badge (and deactivating the existing one). Therefore, the badge itself consists of only a graphic, a name, and a description.

In choosing a badge name and description, keep in mind that these will become the default name and description of any rule you create that awards that badge.

In choosing a badge graphic, you may use any size graphic you like, but NewsGator recommends using a 96 x 96 pixel image in PNG format. Several such graphics are provided to you with your Spotlight installation package - consult with the administrator who installed Sitrion Social, and ask for BadgeIcons.zip. These icons are described below in **Appendix A: Suggested uses for the included badge icons** (and in a similar document included in BadgeIcons.zip).

When you have a graphic ready, either that you made or selected from BadgeIcons.zip, go to the Spotlight Management page and find the **Recognition – Create and Manage Badges** section. Click **Create and Manage Badges**.

This takes you to a page that lists any badges already created; when you initially install, it shows no badges. To create a new badge from your chosen graphic, scroll to the bottom of the page, and enter the badge name and description. Then click Browse to select your image. (If your employees speak multiple languages, you may want to click "Add Localization" at this point to provide your own translations of the name and description you've provided.) Click Insert to create the new badge. You should see it in the listing immediately.

Description suggestions: given the way badge names and descriptions are used in the UI, a description that reads well begins "For" or "Awarded for" followed by whatever the reason is for awarding the badge.

Editing or Deleting a badge

To edit or delete an existing badge, go to this same page by clicking **Create and Manage Badges** from the Spotlight Management page. Click the **More Info** button next to the badge you wish to change.

The entry expands vertically, showing what localization has been done if any, and presenting Edit and Delete buttons. To delete the badge, click Delete. This deletes the badge permanently; it can't be restored.

To edit the badge, click Edit. You now gain Update and Cancel buttons, and all fields become editable. Make your changes and click Update.

New Rule

Name

Vers35 Docs

Description

For editing docs during version 3.5 release

Add Localizations

Points Required

3

Badge

Vers35 Documentation Badge ▼

☐ Show in Leader Board

☑ Show in Available Badges

☐ Deactivated

Prerequisite Rule

None ▼

Internal Events

	Activity Type	Points	Maximum Points
Add	Added to Knowledge Base ▼		

External Events

	External Event	Points	Maximum Points
External Events must be declared before you can assign them to rules.			

Insert   Cancel

Current Rules

<< < Page 2 of 2

	Name	Description	Points Required	Badge	Internal Events	External Events
More Info	Vers35 Docs	For editing docs during version 3.5 release	3	Vers35 Documentation Badge	Yes	No

To create the rule, you must complete the top section, including Name and Description (these will appear in both web parts and admin interfaces), the points required to meet the rule, and the badge that is earned when a user meets the rule. You must also specify whether this rule will be an available option in the **Leader Board web part**, and whether it will be displayed as an earnable badge in the **Available Badges web part** (see the **Using Recognition Web Parts** section below for full descriptions of these web parts). The rule will not be created until all of the above are specified.

The rule can be created as either active or inactive. Check the **Deactivated** checkbox if you don't want the rule to start tracking user actions and accumulating scores for them just yet. You may want to do so if you haven't quite worked out yet which inputs you want, or how you want to weight them. Another case for doing so is if you want the badge to be awarded only for actions taken in a specific quarter or other time span, that hasn't yet begun. Or you may be using external inputs, and you do not yet have all the code in place and operational on the external system to inform Recognition of when the events to be scored have occurred.

To have the rule start tracking user actions immediately upon creation, leave the **Deactivated** checkbox unchecked.

At rule creation time, you can specify what event types will be used in the scoring rule and how to score them, but you are not required to do so just yet. You can add these inputs later when editing the rule (see **Editing and existing rule**, below). However, without any such inputs defined, the rule will do nothing and will not lead to any badges being awarded (and you ought to leave it deactivated until you do add some inputs for it). You also can add localizations of the rule name and description now, or wait until later. See the three sections below for details on doing each of these: **Adding internal events as rule inputs**, **Adding external events as rule inputs**, and **Localizing a rule**.

To specify event types to be scored for the rule, select an activity type from the pull-down list and specify points to be awarded for each occurance of an event of that type, and maximum points (if applicable) for events of that type to be used when adding up points to see if the badge should be awarded.

Clicking "Add" makes that activity part of the scoring rules and allows specifying additional activities.

After all activities are defined, create the new rule by scrolling down to below the input areas for internal and external events, and clicking **Insert**.

Editing an existing rule

To make changes to an existing rule, click the More Info link next to the listing of the rule in the **Spotlight Rule Definitions** page:

This displays more details about the rule composition and its localizations, if any.

Less Info	Instigator (en-US)	For creating stream items that cause reactions	7	Instigator	Yes	No

Show in Leaderboard : Yes
Show in Earnable Badges : Yes

Localization Info

Culture Name	Name	Description
fr-FR	Instigateur	Pour créer des objets de flux qui provoquent des réactions

Internal Events

Activity Type	Points	Maximum Points
Received Answer	3	6
Received Comment	3	6
Received Like	1	3
Received Vote	1	2

Edit

Click the Edit button at the bottom of these details to enable editing. The same UI used to create the rule appears, allowing editing any setting for the rule.

Less Info	Responder	For comments and answers	200	Responder	Yes	No

Name
Responder

Description
For comments and answers

Add Localizations

Required score
200

Badge
Responder

☑ Show in Leader Board

☑ Show in Available Badges

☐ Deactivated

Prerequisite Rule
None

Internal Events

	Activity Type	Points	Maximum Points
Remove	Answer	3	204
Remove	Comment	1	201
Add	Added to Knowledge Base		

External Events

	External Event	Points	Maximum Points
External Events must be declared before you can assign them to rules.			

Update Cancel

You can also add or remove the internal and external event inputs that define the rule's scoring, and create or remove localizations of the rule's name and description. See the three sections below for details on doing each of these: **Adding internal events as rule inputs**, **Adding external events as rule inputs**, and **Localizing a rule**.

When you are done with all changes, including those to localizations and rule inputs, finish and commit your changes by scrolling down to the **Update** button and clicking it.

Situations in which some rule inputs have no effect

When adding event types to a badge rule as outlined in the next section, some of the internal event types listed as available for inclusion in the rule will not actually be counted towards awarding the badge when in a SharePoint 2013 environment. Additionally, there are other event types that won't be counted towards awarding the badge when the badge is a community-level badge.

In SharePoint 2013, any SharePoint-generated events won't get counted towards a badge. This is because of the difference in SharePoint 2010 and SharePoint 2013 event streams which results in Sitrion Social merely displaying these events without making a record of them. These event types include:

- Job title change
- Manager change
- Upcoming birthday
- Birthday
- Upcoming workplace anniversary
- Workplace anniversary
- Profile update
- New colleague
- New membership
- Status Message
- Note Board post
- Rating

Although they show as options when creating badges in SharePoint 2013 environments, the above event types should not be used as rule inputs for badges in SharePoint 2013 environments as they will have no effect.

When adding event types to a community badge rule, only actions of that type that occur within the community will be counted toward the badge rule. Because the following event types are always global in nature (and so never associated with a particular community), they are not available to select for community badge rules (in previous editions of Spotlight, these event types would be selectable, but would accumulate no points):

- Job title change
- Manager change
- Upcoming birthday
- Birthday
- Upcoming workplace anniversary
- Workplace anniversary
- Profile update
- New colleague
- New membership
- Status message
- Kudos
- Sent kudos

These are also not available in community badge rules, because they do not properly associate themselves to a community:
- Blog comments
- Blog posts

Adding and removing internal events as rule inputs

When creating or editing a Recognition rule, you will see an interface like the one pictured here for identifying which events will be part of the rule's scoring, and how much events of each type add to the rule's score. The header is "Internal Events".

Internal Events :

	Activity Type	Points	Maximum Points
Remove	Received Answer	5	20
Remove	Received Comment	5	20
Remove	Received Like	5	20
Remove	Received Vote	7	28
Remove	Answer marked as Answer	10	50
Remove	Received Kudos	7	28
Remove	Badging	10	30
Remove	Manager change	2	4
Remove	Job title change	4	12
Remove	Upcoming birthday	2	2
Remove	Birthday	2	2
Remove	Upcoming workplace anniversary	2	2
Remove	Workplace anniversary	2	2

Add new internal event input

Activity Type :

[Select... ▾]

Points :

[ ]

Maximum Points :

[ ]

[Add]

To add a new event, open the Activity Type drop down. You will see all internal event types that can be added to the rule (and that are not already part of it). In the examples pictured here, the above picture shows several event types that have already been added to the rule. These happen to be the "passive" event types, which means that these are events that don't represent a direct action you took, but for which you get points. The top five (**Received Answer**, etc.) occur when somebody else takes an action on your content. Of these, **Answer marked as Answer** awards points to users whose response to a question gets marked as an answer. **Received Kudos** gets you points when somebody awards you a Kudos. A **Badging** event occurs each time you are awarded a badge. The next two, **Manager change** and **Job title change**, are for changes in your work status. **Sharing Interests** is an alert informing you that someone else shares an interest with you. The bottom four (**Upcoming birthday**, etc.) occur when an anniversary date is about to occur or does occur for you.
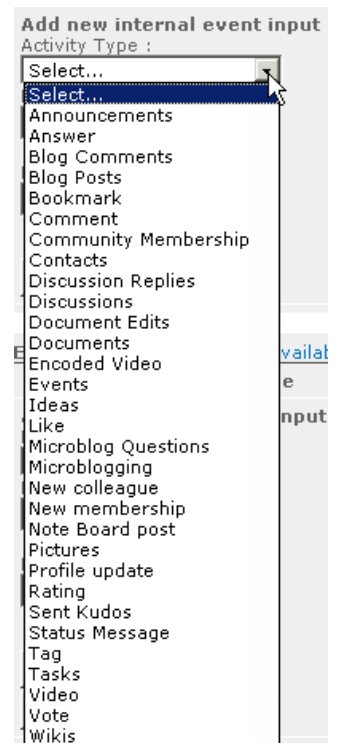
There are two things to note about the input **Answer Marked as Answer**. One, if after your answer has been marked as a good answer (earning you points for it) someone then clicks the "Unmark as Good Answer" link on it, you lose the same amount of points that you earned when it was marked as an answer, resulting in no net point gain for that input for that rule (safeguards prevent you from ending up with negative points for that input for that rule). This is to prevent someone getting too many points should the answer be unmarked and re-marked several times.

Also, this is one of the very few event types that cannot be processed by the job that processes most system events for badge scoring. Points for these events are therefore applied instantly, and not when the Spotlight Processing Job next runs.

To the right is what you'll see for the remaining list of event types, when you open the drop down. All of these are "active" event types. The user performing them gets the points for them.

Most of these are named for a type of list within SharePoint or Sitrion Social. The user gets points for adding an item to a list of the named type. For example, **Announcements** will give points to a user when that user adds an item to an announcements list. **Bookmark** refers to any Links list. Others of this type are **Blog Posts**, **Contacts**, **Discussion Replies**, **Discussions**, **Documents**, **Events**, **Pictures**, **Tasks**, **Wikis**.

Document Edits occurs when you either edit a document that already exists in a document library, or you edit a wiki page that already exists. **Note Board post**, **Rating**, and **Tag** each refer to adding a piece of metadata to a list item or other SharePoint object.

Microblog Questions and **Microblogging** refer to creation of each of these types of events in the activity stream. **Ideas** refers to creation of an idea. **Answer**, **Comment, Blog Comment**, **Like**, and **Vote** refer taking one of the possible response actions on one of these. (Ideas and Vote require the **Idea Stream module** to have been installed.)

Sent Kudos occurs when you go to someone's profile and give them a Kudos, should the web part for doing so have been deployed there.

Community Membership occurs when you join a community. **New Membership**, in contrast, occurs when you attain site membership as determined by SharePoint. **New Colleague** occurs when you add a new colleague.

Status Message occurs when you update the message in the "balloon" on your public profile page. **Profile update** occurs for any other update to your profile information.

Video and **Encoded Video** appear as options if you have the **Video Stream module** installed. **Video** occurs when a video you upload is successfully posted to the activity stream. **Encoded Video** occurs when you receive a notification as to the status of a video you uploaded, as attempt is made to encode it for display in the activity stream. As these can be error messages or success messages, Encoded Video is not a good choice for inclusion in a badge rule, and Video will generally be a better alternative.

Knowledge Base and **Added to Knowledge Base** appear as options if you have the **Enrich module** installed. **Added to Knowledge Base** awards points to a user when one of their activity events is added by someone else to a knowledge base. **Knowledge Base** awards points to a user when they themselves add an item to a knowledge base.

Select the type of event you would like to contribute to the scoring for the badge. For "Points", enter the number of points a user should get each time they perform that event (or have it performed on their content). For "Maximum Points", enter a limit on the number of points that can be accumulated by any one user by doing events of this type, toward awarding a badge by this rule. (Note: "Maximum Points" does not play a role in calculating leader board scores).

Use the Maximum Points setting when you want to ensure that a user must perform more than one event type to earn the badge by that rule.

To finish adding the internal event input to the rule, click the **Add** button. The event type should now display with the list of existing event inputs.

Any internal input can be removed from the rule by clicking the **Remove** link that is part of its entry in the list of existing event inputs.

Remember to click the **Update** button for the rule after this and all other edits to the rule are complete, to commit all changes.

Adding and removing external events as rule inputs

External systems (such as CRM systems) can inform Sitrion Social of events that occurred in them through the "TriggerInput" API call. To get this up and running, you must follow the directions in the **Defining new inputs – external actions** section, below. Once operational, you can include the external events that Recognition knows about in the scoring for a rule.

You can do so when creating or editing a Recognition rule. Find the External Events interface, like the one pictured here.

Click the External Events dropdown to see the list of available external inputs that have already been identified to Spotlight. If you don't see the event you need, change the contents of this list by clicking the **Define available external events** link, and following the instructions in the **Defining new inputs - external actions** section below.
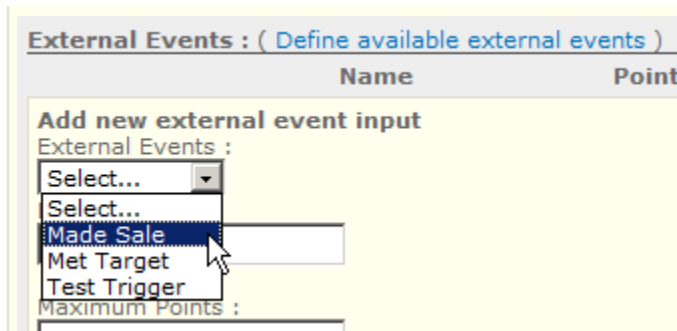
Select the external event type that you want to make part of the rule, and wait a moment. The Points field will automatically fill in with the default number of points awarded for that event type. You may change this value as desired, for use in this rule; enter the number of points a user should get each time they perform that event.

For "Maximum Points", enter a limit on the number of points that can be accumulated by any one user by doing events of this type, toward awarding a badge by this rule. (Note: "Maximum Points" does not play a role in calculating leader board scores). Use the Maximum Points setting when you want to ensure that a user must perform more than one event type to earn the badge by that rule.
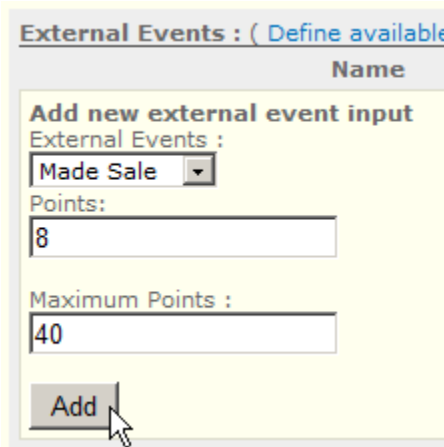
To finish adding the external event input to the rule, click the **Add** button. The event type should now display with the list of existing event inputs.

Any external input can be removed from the rule by clicking the **Remove** link that is part of its entry in the list of existing event inputs.

Remember to click the **Update** button for the rule after this and all other edits to the rule are complete, to commit all changes.

Localizing a rule

If you need to have badge awards display in more than one language, you need to localize the name and description of the rule that awards it. This works the same way it does for localizing a badge. To do this, when creating or editing a rule, click the "Add new Localization" link just above input definition area.

A form for entering a new localization appears below the listing of any current localizations of the badge name and description. Set the **Culture** dropdown to the language you are translating into, then add the translated name and description and click Add.

The new translation should be instantly added to the existing list of localizations, at the top of the Localization Info section.

You cannot modify an existing localization, however you can delete one and replace it. To delete, just click the **Remove** link to the left of its entry in the list of localizations.

Defining, modifying, and using inputs for external actions

As it is with Expertise, one cannot add to the list of internal actions (actions taken within SharePoint) that can contribute to badge scores. All the internal actions available for scoring are already listed on the "Award Badges Automatically" page. One can, however, call Sitrion Social from an external system (such as a CRM system) to have

actions occurring there counted toward Recognition scores. Before you can make the call from the external system, you need to identify in Sitrion Social the types of actions that can occur in the external system. This amounts to providing an identifier, a descriptive name, and a default scoring weight.

There two ways to access the page where you define and modify these inputs. In the Spotlight Management Page, find the **Recognition – Award Badges Automatically** section and click the **Define available external events** link.

Alternatively, on the Recognition Rule Definition page, in the interface for defining a new rule, click the **Define available external events** link at the top of the External Events section.

Either of these will bring you to the **Recognition External Input Definition** page. On this page you'll see a list of any external input identifiers that have already been defined, and below this the input box for a new identifier.

Adding a new external input

The inputs are in the same order as the listed definitions. From left to right, enter a friendly name that will be used to identify this input in UI displays; then the "Trigger", an internal name to be used by the external system when making the API call that tells Spotlight this event occurred; then the default weight to use for this input in scoring rules (administrators can choose a different weight when constructing the rules that use this input). When your entries are complete, click **Insert**.

New Input

Insert			
Clear	Met Target	met_target	7

Your new external input is added to the list.

		Name	Trigger	Default Weight
Delete	Edit	Made Sale	made_sale	8
Delete	Edit	Met Target	met_target	7
Delete	Edit	Test Trigger	TestTrigger	4

New Input

Insert			
Clear			

Modifying an existing external input

To modify an existing external input, find its entry in this list and click the Edit button to the left.

	Name	Trigger	Default Weight
Delete / Edit	Made Sale	made_sale	8
Delete / Edit	Met Target	met_target	7
Update / Cancel	Test Trigger	TestTrigger	4

The entry is converted into editable text entries. Modify the entries as desired, and then click the **Update** button to the left to finish. Click the **Cancel** button to the left to abandon your edits.

Using an external input

To have the Recognition engine register events that occurred on an external system, that external system must call the TriggerInput API to inform which event type happened, and to which user it should be attributed. The syntax is as follows:

URL: /_vti_bin/ng/spotlight/spotlight.svc/TriggerInput/?trigger=[Trigger]&foruser=[Domain\Username]
HTTP Verb: POST

[Trigger] here is the internal name or "Trigger" as defined above, and [Domain\Username] is the person who performed or should get credit for the item.

Below is an example of executing such a call using .Net code.

```csharp
string serverName = "http://servername"; //the root of the wfe hostname where spotlight is installed
string trigger = "TriggerValue";         //the value set up in Manage External Inputs
string forUser = @"domain\accountname";   //the user who performed the action

var request = (HttpWebRequest)WebRequest.Create(string.Format("{0}/_vti_bin/ng/spotlight/spotlightservice.svc/TriggerInput/?trigger={1}&foruser={2}", serverName, trigger, forUser));

request.Credentials = CredentialCache.DefaultCredentials; //or load the credentials of a user who has
 Spotlight administration access
request.Method = "POST";
request.ContentType = "application/x-www-form-urlencoded";
request.ContentLength = 0;

try
{
    var response = request.GetResponse() as HttpWebResponse;
    if (response.StatusCode == HttpStatusCode.OK)
        Console.WriteLine("Trigger request sent succesfully!");
}
catch (Exception Ex)
{
    Console.WriteLine("Server returnd an error!!!");
}
```

Setting to disable community-level recognition features globally

Spotlight allows two types of badges to be created; global badges, that are available to all users based on activity anywhere in SharePoint, and community-level badges, that are available to community members based only on their activity within the community. Global badges can only be created and maintained by those with explicit Spotlight administrator permissions; community badges can be created and maintained by any administrator of the community in question. If you do not want your community administrators to have this capability, and wish to allow only global badges to be awarded within your organization, you can opt for this using a global setting that is set on the Miscellaneous Settings page of the NewsGator Social Platform Management page:
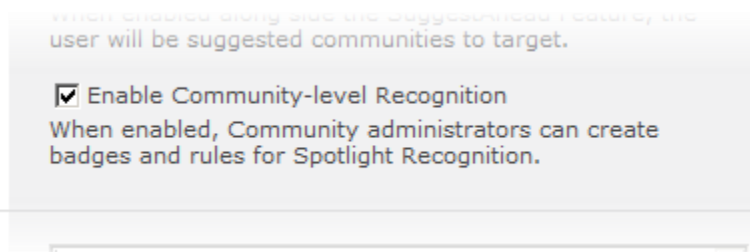
Uncheck this, and the following will happen:

- The Spotlight Administration link will no longer be available on any community Admin tab.
- Any existing rule-based community badges will stop accumulating points based on user activity.
- Community Leader Board and Available Community Badges web parts will display a message stating that community-level recognition features have been disabled and that the web part should be removed or hidden.
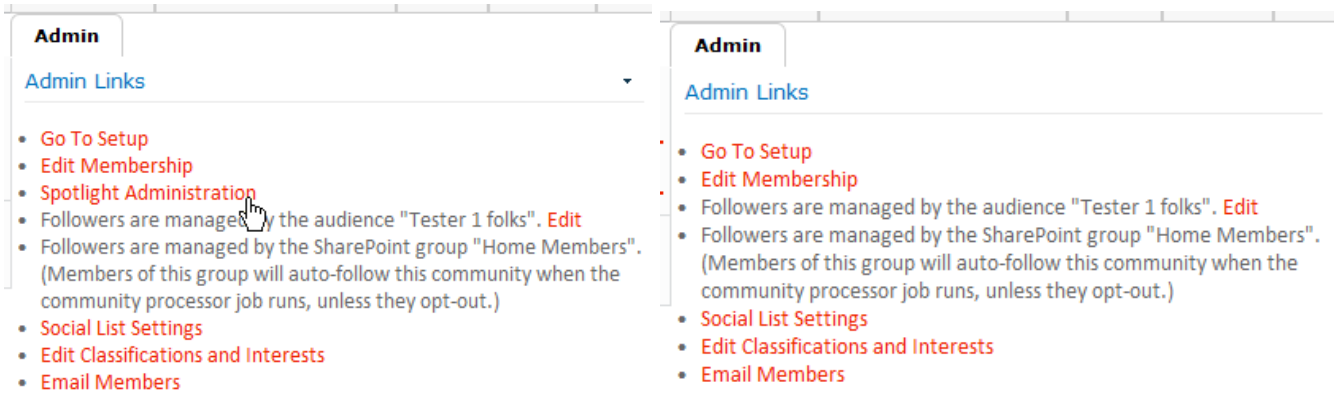
Any public community badges already awarded will still display on the user's profile.

Awarding badges manually

Your organization may want to recognize achievements or behaviors that an automatic rule can't calculate. To allow you to recognize users for any achievement, badges can be manually assigned to users. You can assign a badge to multiple users at once, and see a preview of what the award will look like in the activity stream before finishing the assignment.

The badge definition process is the same as described above in **Creating a new badge**. In fact, you can award any existing badge manually, even one that is also being awarded automatically by an active rule. Users who are awarded a badge manually may separately be awarded the same badge by the automatic rule.

To award a badge manually, find the **Recognition – Award Badges Manually** section in the Spotlight Management page, and click "Manually Award Badges". You'll see a screen like the one pictured:
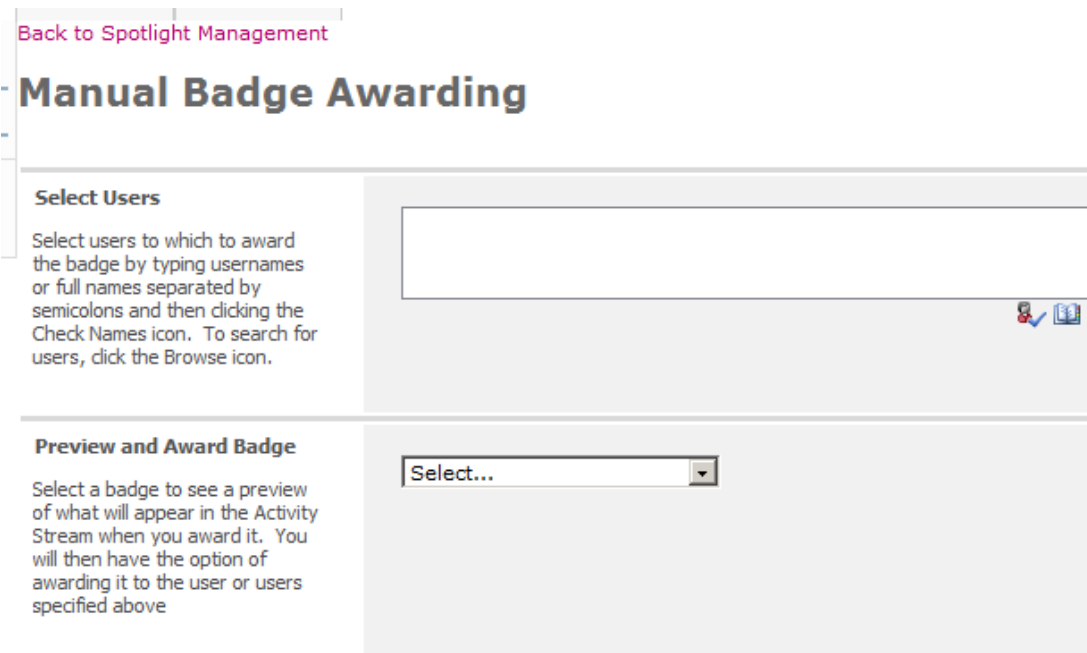
In the **Select Users** section enter the full names or usernames of the users you want to manually award a badge to. The leftmost icon below the box will verify the names. The rightmost icon allows looking up users.

Then select the badge you want to award:

Once you've done this, you'll get to see a preview of what the activity stream announcement of the award will look like:

Click **Award Badge to User(s)** to finish.

Community Badges

Community administrators can set up badges that are awarded based on activity within a particular community. Display of these badges in the stream will be limited to members of the community to which they belong, and to visitors to the community site. They will, however, be publicly viewable via the Earned Badges web part on user's profile pages, and in mini profiles.

Setup of such badges is available via a Spotlight Administration link on the community Admin tab. Viewing of such badges is available via single-community versions of some existing Spotlight web parts, and via the Members tab of the community.

Enabling or Disabling Community Badging

By default, community administrators have the capability to define badges and badge rules for their communities. If you do not want your community administrators to have this capability, and wish to allow only global badges to be awarded within your organization, you can opt for this using a global setting that is set on the Miscellaneous Settings page of the NewsGator Social Platform Management page:
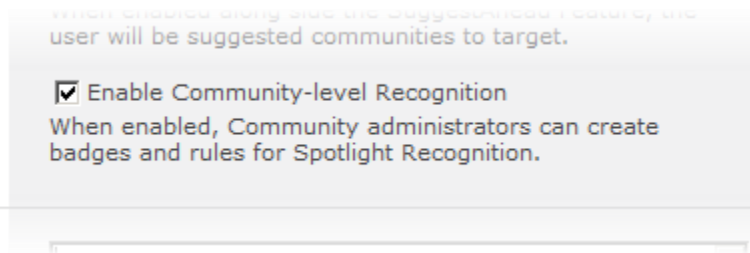
Uncheck this, and the following will happen:

- The Spotlight Administration link will no longer be available on any community Admin tab.
- Any existing rule-based community badges will stop accumulating points based on user activity.
- Any Community Leader Board and Available Community Badges web parts that have previously been deployed will display a message stating that community-level recognition features have been disabled and that the web part should be removed or hidden.
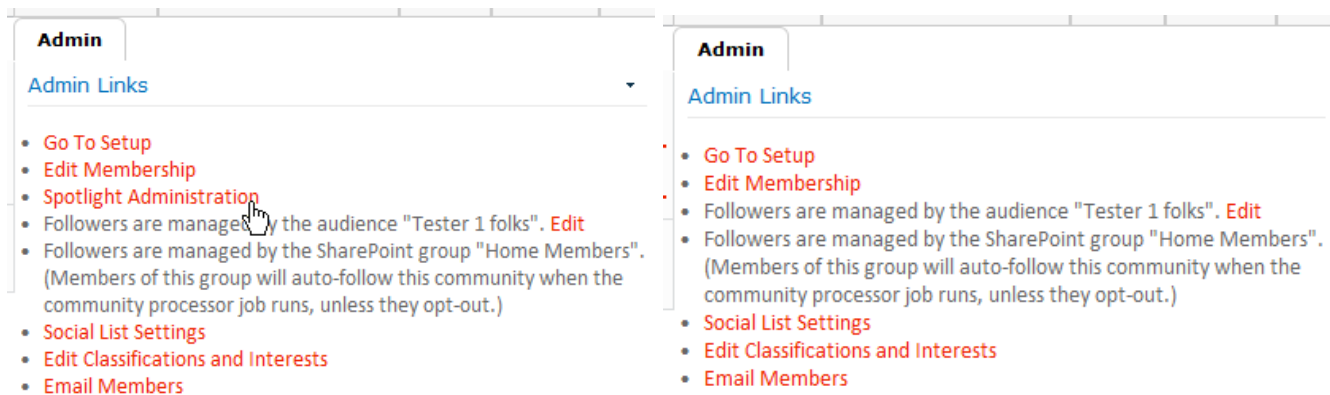
Any public community badges already awarded will still display on the user's profile.

Creating Community badges and badge rules

Community admins can create badges and badge rules by following the **Spotlight Administration** link on the Admin tab of any community:
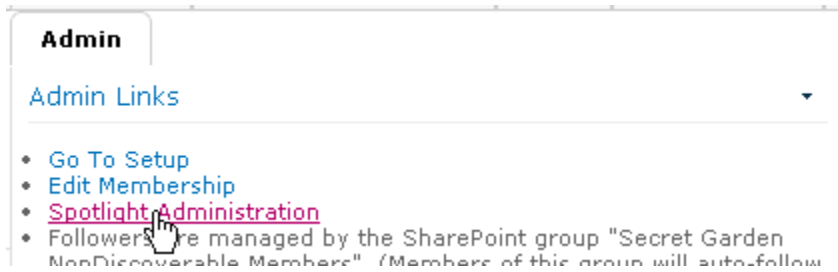
This opens an administration page which is a limited version of the global Spotlight Administration page:
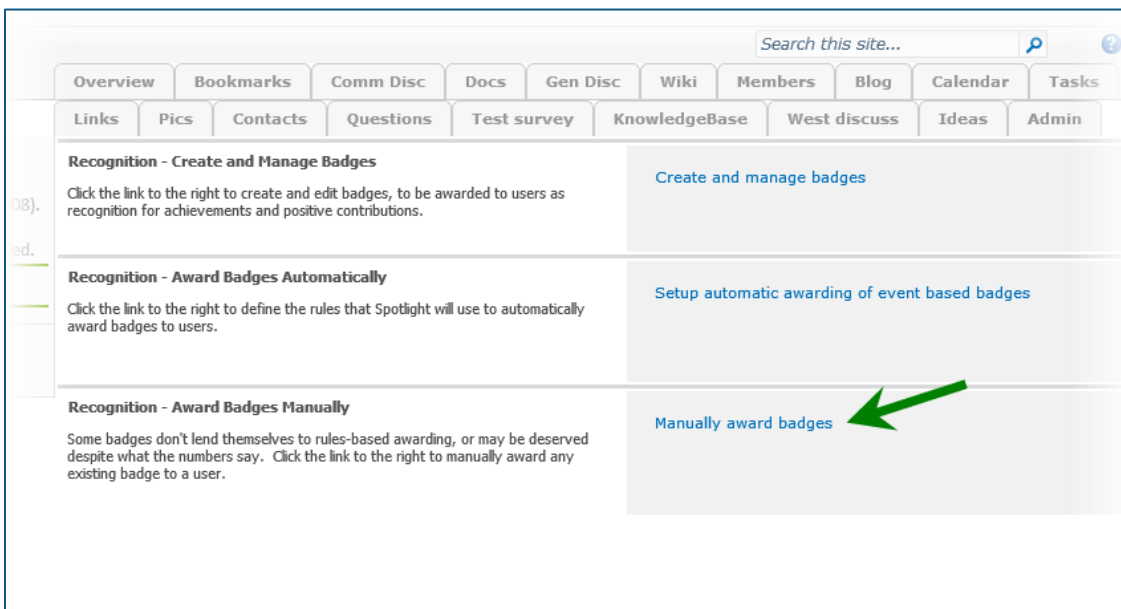
Click **Create and manage badges** to view a page much like the global page for managing badge icons and their default names. It will be prepopulated with any global badges that a global Spotlight Administrator has designated for re-use in communities. This is intended as a labor-saving feature for setting up the more universally-popular badges. (None of the global badge rules can be made available in communities, however - each community must create its own rules.) See **Creating a new badge** below for full details on how to set up new badges.

When you've defined all the badge icons and default names/descriptions that you feel you'll need for your community badges, click the **Setup automatic awarding of event-based badges** link to setup the rules that will award badges in the community. This works as in the global page for the same (see **Awarding badges by automatic rule**, below). Only actions of that type that occur within the community will be counted toward the badge rule.

Because the following event types are always global in nature (and so never associated with a particular community), they are not available to select for community badge rules:

- Birthday
- Job title
- Kudos
- Manager change
- New colleague
- New membership
- Profile update
- Sent kudos

- Status message
- Upcoming birthday
- Upcoming workplace anniversary
- Workplace anniversary

These are also not available in community badge rules, because they do not properly associate themselves to a community:
- Blog comments
- Blog posts

Community admins are not able to define external events that can be used in badge rules. To add external events, they must have a global Spotlight administrator create the external rule.

Click **Manually award badges** to bring up the Manual Badge Awarding screen which works the same way as the global Spotlight page for manually awarding a badge. Begin by selecting a badge from the dropdown at the top. This should show both badges configured just for that community, and badges configured centrally but with the option selected for making these available for use as community badges.
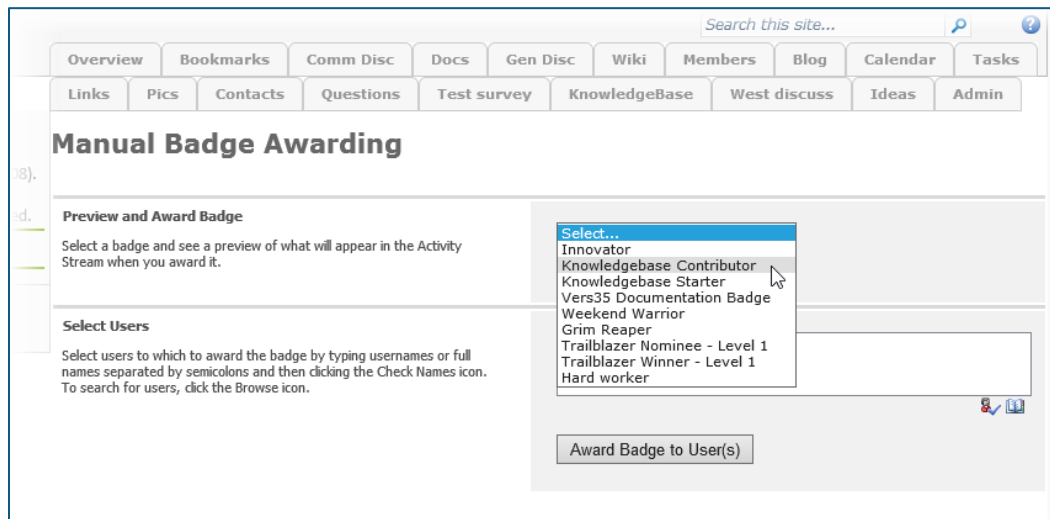
Once you've selected a badge and moved onto the next section, a preview appears of what the badge event in the stream will look like.

In the next section, you select community members who are to receive the badge using SharePoint's people picker control. Note that this control will not prevent you from specifying users who are not community members. However, if non-community members are specified, you will be prevented from completing the badge-awarding process.
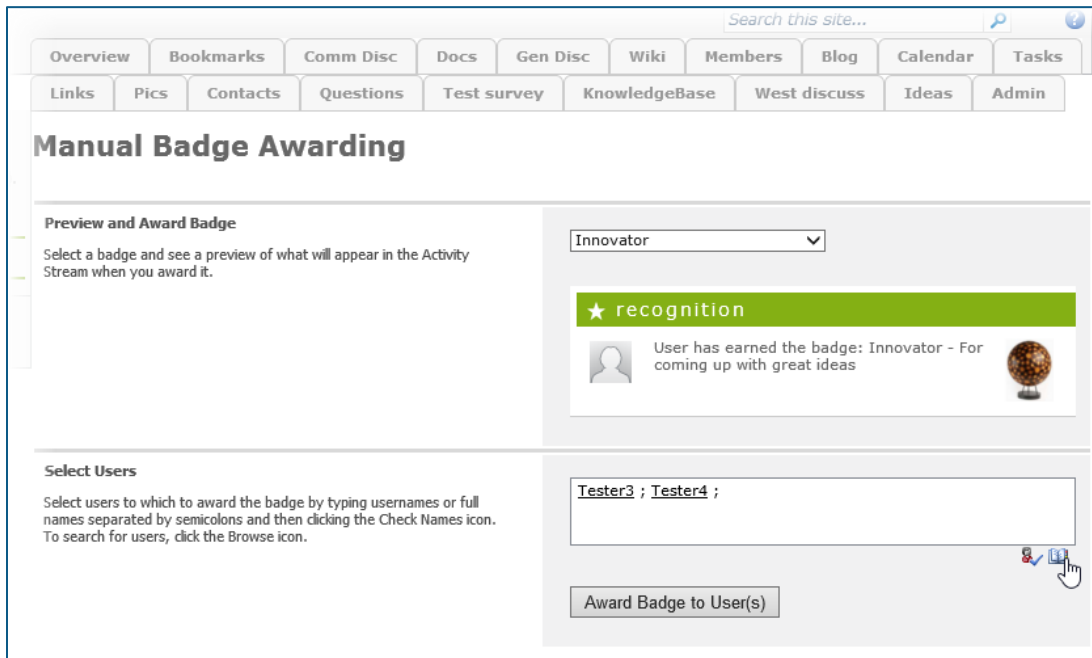
When you've selected the correct recipients, click the *Award Badge to User(s)* button. If the award succeeds, you'll see this success message:
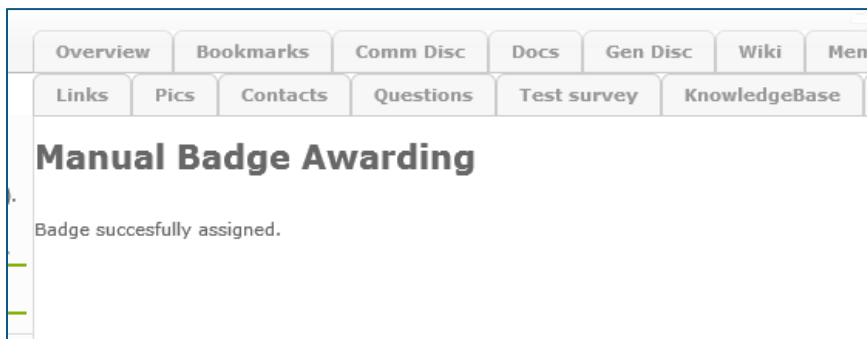
The badge award appears in the community stream, on the Members tab in the "Community Badges" column, on the user's miniprofile, on the user's stream, and in the user's Earned Badges web part on their public profile page. If the community is private, the badge award will only be visible to community members.

Direct User-to-user (Kudos) Badges

There is a web part that, when deployed to public user profile pages, will allow users to give kudos to other users in the form of a badge. Here is what it looks like on a user's profile page:
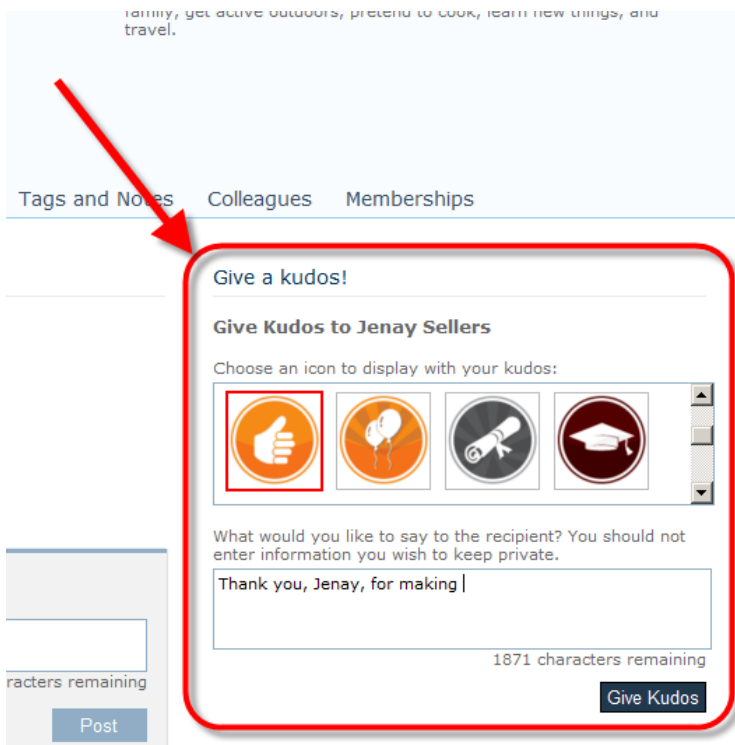
Notice it gives the person's name. When you go to someone else's profile page and use this web part, you are giving them kudos. (Users are not permitted to give kudos to themselves, however.) Your message will appear in the activity stream for that person and her followers, alongside whatever icon you chose to use:

There are a set of 14 icons available by default for use with in kudos. Spotlight adminstrations can make any changes they wish to this list via the global Spotlight Management page, by adding new badges and marking them as kudos badges, or by removing existing kudos badges. A badge marked as a kudos badge may not be used for any other kinds of badge awarding, and vice-versa. Kudos badges can only be defined at the global level (there are no community-level kudos badges).

Renaming Kudos Badges

The term "Kudos" is not in use in many parts of the world, and so you might want to use a different word as the name for user-to-user badges. To do so, use the **Customize Spotlight UI** link on the Spotlight Administration page.

On the page this brings up, simply type in a new word to replace "kudos" and click Save. Use the **Customize Localizations** link to provide the translations for your new word if you have users who speak different languages from each other.

The word "kudos" is then replaced with the term you selected. Note that this does not change web part titles, so if you have a title visible like the example below, you'll need to edit the web part settings to change it.

Deleting Earned Kudos

Kudos awarded to you

When viewing your earned kudos badges on your own profile, you will see a "Delete" option under each. Click to delete the kudos badge; the badge will be permanently gone from view for all users, including yourself. The activity stream event announcing the award of the kudos badge will also be removed – but only if the event occurred *after* upgrading to version 4.0 (or higher) of Sitrion Social.

As was previously possible, you can also delete the activity stream event that announces the award of the kudos badge, but doing so will not delete the badge. To delete the badge, you must do so from the Earned Kudos web part.

Kudos that you awarded to someone else

You can also delete any kudos you awarded by visiting the profile of the person you awarded it to, and finding it in their Earned Kudos web part. This is useful for correcting spelling errors. This also deletes the activity stream event announcing the award of the kudos badge, if the event occurred after upgrading to version 4.0 (or later) of Sitrion Social.

Dependent Badges

With badges, goals that seem distant tend not to be as immediately motivating as goals that are perceived as reachable in the near term. Setting up some badges as quick wins creates positive reinforcement early, which is encouraging. However, motivation for a particular behavior may wane once the quick-win badge is earned. Setting a new, higher goal for the same behavior that earned the quick-win badge can keep motivation high.

Dependent badges is a new Spotlight feature designed to enable setting of progressively higher targets for users to strive for. A set of related badges can be chained together in a sequence. Upon activation of the chain of badges, only the first badge in the sequence appears as earnable; the other badges in the chain are hidden. When a person earns the first badge in the chain, the next badge appears to the user in their list of earnable badges.

The above picture demonstrates an example of this. Suppose you want to encourage users to create more original microblog posts. You can set up a progressive chain of badges that are awarded for microblogging, the first of which is awarded after the user posts 25 microblogs. At the start, users will only see the badge for reaching 25 microblogs in the Available Badges web part. When a user earns this badge, it disappears as usual from the Available Badges web part (moving into her display of earned badges), and a new badge, awarded for posting 50 total microblogs, takes its place. Upon earning that one, the badge for posting 100 microblogs now appears as available, but the one for posting 200 microblogs remains hidden. Finally when the 100-microblog badge is earned, the 200-microblog badge is revealed as available.

At this stage, all prior badges earned in the chain show among the user's earned badges. Badges are not hidden as their successors are earned.

A badge's immediate predecessor in such a chain is called its **prerequisite badge**, while the badge that comes immediately after it is called its **successor badge**. In this example, the 25 microblog badge is the prerequisite of the 50 microblog badge, and the 100 microblog badge is the successor of the 50 microblog badge.

Note that these chains of badges can be branched, as in the picture below. This can become difficult to manage, especially if part of the tree is deactivated. It can be hard in this case to track whether you've "orphaned" a successor badge by deactivating one of its prerequisites. The recommended practice for dependent badges is a chain of badges with no branches.

Defining a chain of dependent badges

Successor badges are defined relative to their prerequisite badges. In the chain we give as an example above, the first badge would require 25 microblogs to achieve; the second we define as requiring 25 more microblogs instead of as requiring 50 overall.

To begin defining a chain of dependent badges, decide whether they are going to be globally-available badges or based in a particular community. Go to either the global Spotlight Management page or the community Spotlight Management page. Click **Create and manage badges** to set up your badge icons, if need be, then click the **Setup automatic awarding of event-based badges** link. (**NOTE:** The dependent badges feature is not available with the new count-based badges.)

The following picture depicts the recommended way to set up what would be the first badge in the example chain above:

Notice that "Show in Leader Board" is set to **Yes**. It is recommended that only the first badge in a chain be displayed in the Leader Board. That is because this is the only badge that represents user's overall progress in the chain, and also because it would be somewhat redundant to have the others show.

It is recommended to have "Show in Available Badges" set to **Yes** for all badges in the chain. Otherwise, a user will perceive having reached the end of the chain, upon reaching the first badge rule with a **No** for this setting.

For this, the first rule in the chain, there is no prerequisite, so the **Prerequisite Rule** setting is left on "Select...".

It is recommended that all rules in a chain are created in a deactivated state, to all be activated together once they're all defined and the start time arrives. You'll get warnings if you leave some rules in a deactivated state while others are active, to prevent the "stranding" of active rules at the end of the chain due to deactivated rules in the middle of the chain.

The following picture shows the recommended way to define the next badge rule in the chain:

Notice that the **Points Required** is set to 25, even though this badge is displayed as being awarded for creating 50 microblogs. This is because points for this badge won't begin accumulating until after its prerequisite badge is awarded, and in this case the prerequisite requires 25 microblogs to earn.

Notice that "Show in Leader Board" is set to **No**. This setting is recommended for all remaining successor badges in the chain.

Choose the appropriate badge in the **Prerequisite Rule** dropdown to turn this badge rule into a dependent (successor) badge rule.

To view the rules that you create in a deactivated state, you must check the **Show Deactivated Rules** option, as pictured below:

Current Rules

	Name	Description	Points Required	Badge	Internal Events	External Events
More Info	Microblogger (Deactivated)	For creating 25 total microblogs	25	**25** 25	Yes	No
More Info	Microblogging Star (Deactivated)	For creating 50 total microblogs	25	**50** 50	Yes	No
More Info	Microblogging Expert (Deactivated)	For creating 100 total microblogs	50	**100** 100	Yes	No
More Info	Microblogging King (Deactivated)	For creating 200 total microblogs	100	**200** 200	Yes	No

This screen depicts the full chain from our example. Notice how the Points Required column shows incremental values for points accumulation, rather than total values.

Note: Spotlight does not check for circular dependencies among dependent badges. It is up to the Spotlight administrator to avoid situations such as Badge B having Badge A as its prerequisite, and Badge A having Badge B as its prerequisite.

Note: Successor badges do not earn points during the pass of the Spotlight Processing job in which its prerequisite badge is awarded, even if there are events for which they should get points that occurred after the event that caused the prerequisite badge to be earned.

Count-based Badges

In previous releases of Spotlight, badges based on rules could only accumulate points as events happened. Users would only gain badges for the things they did *after* a badge rule was activated. There are some activities, however, that it does not make sense to continue doing beyond a certain amount, such as adding colleagues or joining communities. Users who have been good about doing these things *before* the badge rule is activated do not have as much of an honest opportunity to earn these badges. This can amount to being punished for being and "early adopter".

To avoid this, there are now a set of three badges that are awarded based on overall counts of some quantities, instead of on the number of actions since a certain point in time. They come ready-to-use, with preset icons, names, and descriptions, and need only be activated to start using them.

One of these is awarded for following a large total number of communities. By default this one is called "Collaborator", but you may change this to something else, such as "Groupie". The count does not include spheres followed.

One of these is awarded for having a large total number of colleagues. By default this one is called "Follower", but you may change this to something else, such as "Kinship" or "Affiliation".

The final one of these is awarded for having been declared as a colleague by a large number of other people. By default this one is called "Well Followed", but you may change this to something else, such as "Vogue".

To activiate, go to the Spotlight Management page and click the new link in the Award Badges Automatically section, titled "Setup automatic awarding of count-based badges". (As these count-based badges only make sense at a global level, the admin page for new community-level badges will not have this option.)

Count Based Rule Definitions

To activate any of the following count-based badge rules, click Edit, uncheck "Deactivated", enter a "Count Required", then click Update. Before clicking Update, you may also change any other rule property. "Count Required" is the count the user must reach to be awarded the badge. "Name" and "Description" will appear in web parts that display badges.

	Name	Description	Count Required	Badge	Show in Leader Board	Show in Earnable Badges
Edit	Connector	For having declared a large number of users as your colleague.	5	Connector	Yes	Yes
Edit	Well Followed	For having been declared a colleague by a large number of users.	5	Well Followed	Yes	Yes
Edit	Collaborator	For following a large number of communities	7	Collaborator	Yes	Yes

Viewing administrative reports

A collection of reports are available to Spotlight administrators that let you view the highest scoring users for a given tag, the top tag for each user, that let you hide undesired tags and later restore them, and hide users from displaying in Expertise output, and later restore them.

Go to the **Reports** section in the Spotlight Management page, and click "Admin reports on Recognition". This brings you to a page with a dropdown that says "Select A Report", and containing two report selections. Two additional reports, Badge Detail and User Detail, are not selectable here, but can be navigated to by clicking on the name of any badge or user that you see listed in any of the other reports.
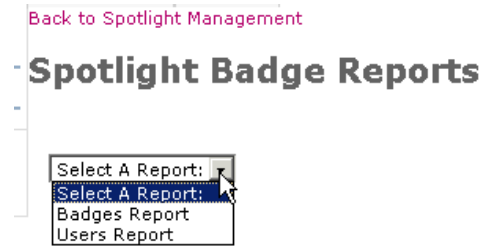
Badges Report

Select **Badges Report** to see a report that shows each badge that has been awarded. Badges awarded by different rules are listed multiple times, once for each rule and once more for manual awarding. "Number awarded" shows the number of different users who have earned the badge by that rule (or manually). "Leader" is the person who has accumulated the most points toward earning the badge by that rule.

You can sort on any column in the report by clicking on that column's header text.

Search for any badge by name by typing any portion of the badge's name into the search box and clicking the search icon.

Click on the name of any badge to see the badge detail report for that badge. Click on the name of any user to see the user detail report for that user.

Badge Name	Awarded because of Rule	Number awarded	Leader
5 Years of Service	Manually Awarded	26	
5 Years of Service	uploaded doc	1	Tester1
Curator	Curator	12	Jay Canete

Users Report

Select **Users Report** to see a report that shows an unfiltered list of badge earners sorted by name. Each user displays only once. For each user, the last badge they earned, and the date they earned it, is also displayed.

You can sort on any column in the report by clicking on that column's header text.

Search for any user by name or username by typing any portion of their name into the search box and clicking the search icon.

Click on the name of any badge to see the badge detail report for that badge. Click on the name of any user to see the user detail report for that user.

Badge Detail Report

The badge detail report is accessible by clicking any badge listed in another report. The report displays as a popup. It shows the list of all users who have earned this badge sorted alphabetically. The report shows the user's name, the name of the rule by which they earned it and the date the badge was earned. Clicking on any column header will sort by that column. Clicking on the name of any user will display the user detail report for that user.

User Detail Report

The user detail report is accessible for a particular user by clicking that user's name where listed in other reports. The report displays as a popup. The user detail report shows the list of all badges earned by this user in reverse chronological order by date earned, and the date the badge was earned. Clicking on any column header will sort by that column. Clicking on any badge will display the badge detail report for that badge.

To revoke any badge earned by the user, visit their user detail report and click the **Revoke Badge** link.

User Options for Display and Hiding of Badges

Users have a few options for hiding badges and kudos they have received, either specific ones of these, or all of them. More information can be found in the User Guide in the Spotlight section.

NOTE: As of the 5.3 release, community owners have the option of suppressing badge events in community streams. Please see the 5.3 Release Notes for more details.

Sitrion Social Video Stream Module Administration

Video Stream and Multi-farm deployments

Video Stream will run in a multi-farm environment.

Video Stream needs a VideoStream service application per farm. This service app should not be consumed by other farms. There will need to be an encoding service and a streaming service per farm. The encoding service will only encode videos contained in the local farm. The streaming server will only stream videos that are contained in the local farm. The encoding service and streaming service can be deployed alongside other services.

In a multi-farm configuration, videos are played from the streaming server on the farm which contains the video.

Video Player Options

There are a number of configurable options in the player that can be changed in the Video Player web part.

These options include:

1. Video player width and height
2. Stretch:
   a. None: The content preserves its original size.
   b. Fill: The content is resized to fill the destination dimensions. The aspect ratio is not preserved.
   c. Uniform: The content is resized to fit in the destination dimensions while it preserves its native aspect ratio.
   d. UniformToFill: The content is resized to fill the destination dimensions while it preserves its native aspect ratio. If the aspect ratio of the destination rectangle differs from the source, the source content is clipped to fit in the destination dimensions.
3. Show statistics option: When enabled shows the video statistics.
4. Enable Debug Messages: When enabled shows a log of all of the actions to render the video in the player which is helpful for troubleshooting. Off by default.
5. Video plays when page loads: When enabled (default), the video will start automatically when the user loads (or lands on) the page. When disabled the user has to start the video manually.
6. Override video URL: Specifies the URL of a video that is to be played in the web part. This is used to show a particular video on a page.
7. Start playback on average quality track: When enabled (default), the video starts streaming at the average bit rate instead of the lowest streaming rate.
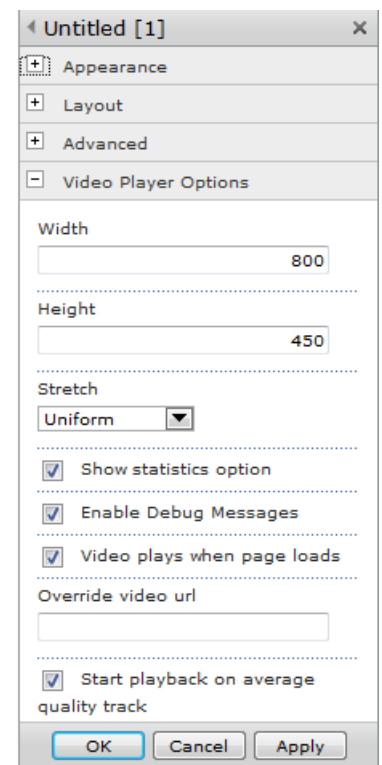
Other Video Stream Options

There are a number of other important server-side configuration options in Central Administration / Manage Service Applications / NewsGator VideoStream Service Application / Application Properties.

Enabling mobile and other encoding formats

Go to the 'Enabled Video Encodings' section for enabling support for various ways of viewing videos:

Mobile

To enable the mobile capability of Video Stream, check the 'Progressive Download Mobile' box in the Enable Video Encodings section. Please note two important things: a) it may take a while for Video Stream to encode all original videos into the mobile format and b) it is not possible to turn mobile encoding off once turned-on.

Here's what the Mobile Encoding setting section looks like after you have enabled mobile support:

HTML 5.0

This section also allows you to enable Progressive Download HD which is used for HTML 5.0 support.

Smooth Streaming for the browser

To enable encoding for Smooth Streaming, check the 'Microsoft Smooth Streaming' box. It's checked by default.

If you decide to enable any of these, be sure to check 'Encode previously uploaded videos to the newly enabled encodings' if you want existing videos to be encoded to those formats.

Note that if you want the SilverLight-based browser to support something other than Microsoft Smooth Streaming you must also make the appropriate selection in the 'SilverLight Video Player Video Encoding' (see below). Smooth Stream works best when users will have varying levels of network connectivity (from slow connections to fast connections). Progressive Download works best when the majority of users have modest to high connection speeds. With Progressive Download, users with low speed connections will see frequent buffering.

Video Stream Service Providers

Video Stream supports custom encoding and streaming service providers and will support other out of the box options in the future. To enable a custom service provider, select accordingly below.

Original video files retention configuration

Select "Keep original video files after successful encoding" if a) you may need to re-encode existing videos in the future or b) want to support the mobile format for existing videos in the future (if it is not enabled already). This is the recommended option.

Large file uploader configuration

Video Stream comes with a SilverLight based large file uploader to minimize load on the network. To disable this uploader in favor of the SharePoint uploader, deselect the "Large File Uploader" option in the SilverLight Large File Uploader section.

Metrics

Video Stream leverages the metrics already available through Sitrion Social. Video Stream has its own event indicating that a new video has been created. The video event, likes and comments on videos are automatically included in global reporting as well as in communities and video centers. This means that activity related to video is included in the Top Users Activity Report, Activity By Type and Activity History. The Activity History for video only can be viewed as seen below. On a regular community these web parts appear under the Admin tab.
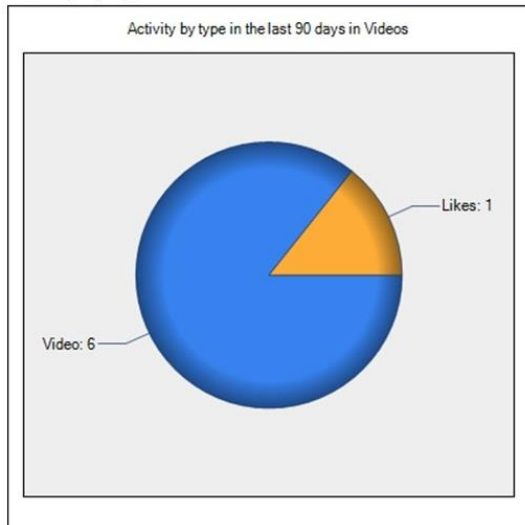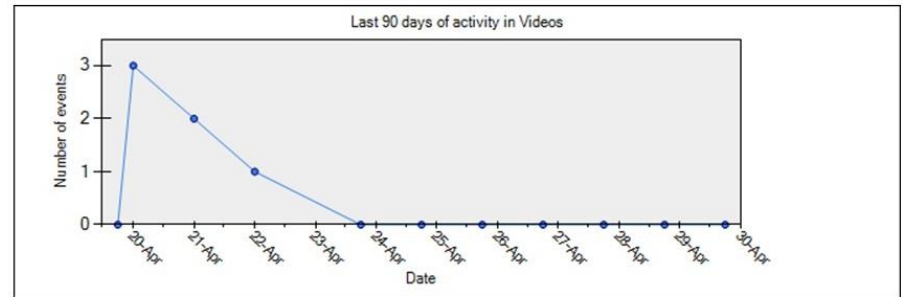
Video List Management

Sometimes it may be helpful to work directly in the video list. End users can view this list directly.

A user could change some of the properties of the video or upload a replacement video.
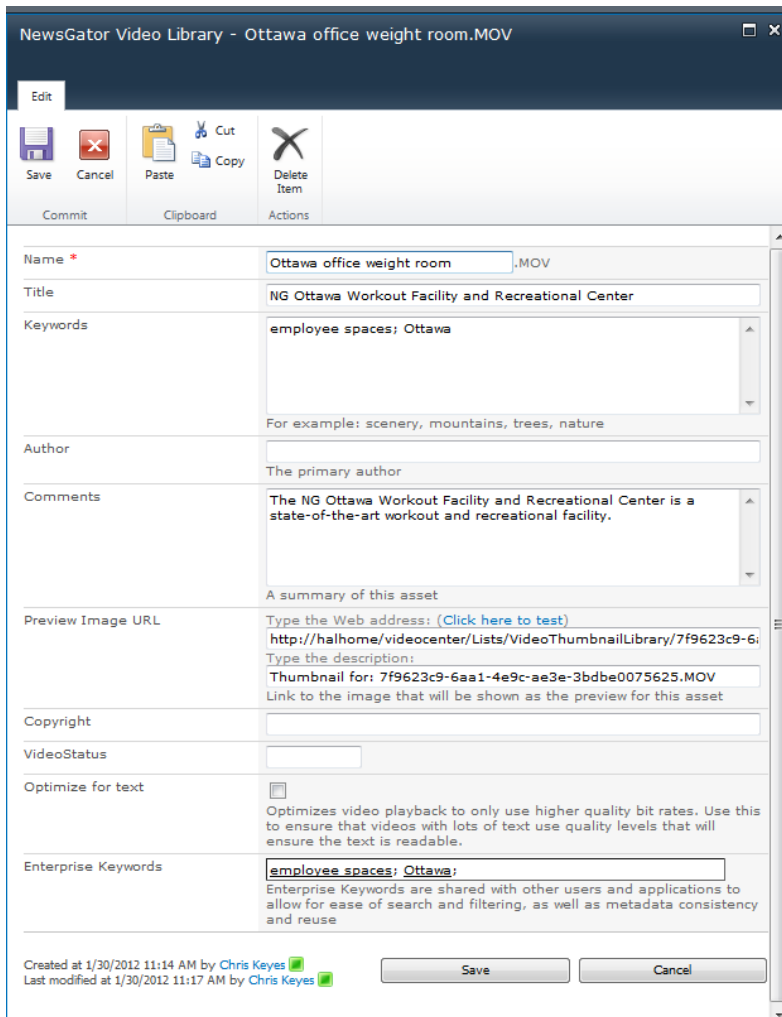
Exporting

Exporting the list of videos to Excel can also be handy at various review points.
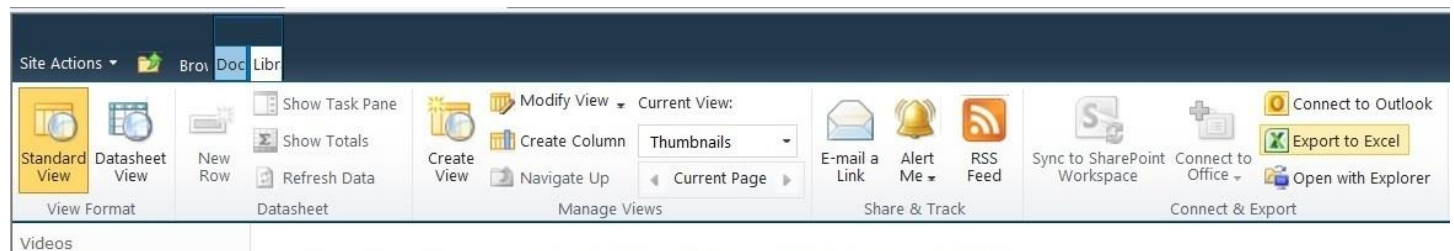
Managing encoded videos

To help administrators track the status of videos in the encoding process, Video Stream supports a video encoding management console. This console is available in the NewsGator Video Stream Service Application management area in Central Administration. The Manage NewsGator VideoStream page contains a number of video summary statistics including:

- Number of videos uploaded
- Number of videos encoded
- Number of videos that failed encoding
- Average number of uploads per day
- Average video length
- Average encoding time

Click on Encoding Console to view the encoding status of uploaded videos:

Encoding Console

File Name	Progress	Status	Uploaded ↓	Start Encoding	End Encoding	Encoding Duration	Site	Encoding Service	Preset	Original	Restart
		All ▾					All ▾	All ▾	All ▾		
My ScreenCast Demo.wmv	Done	Ready to watch	1/30/2013 8:15:05 PM	1/30/2013 8:15:19 PM	1/30/2013 8:15:25 PM	00:00:05	/SSPublic	DEV2K8SS2010-5	VC-1 IIS Smooth Streaming - SD 480p VBR	☑	Restart Encoding
My ScreenCast Demo.wmv	Done	Ready to watch	1/30/2013 8:15:05 PM	1/30/2013 8:15:17 PM	1/30/2013 8:15:19 PM	00:00:02	/SSPublic	DEV2K8SS2010-5	NG.CommandLine.ProgressiveMobileH264.txt	☑	Restart Encoding
Video Stream Timeline Comments in Feature in 3.5_1c97f9e5-b2a4-4a9b-a56c-00e22bccd26f.wmv	Done	Ready to watch	1/30/2013 7:20:05 PM	1/30/2013 7:21:09 PM	1/30/2013 7:23:57 PM	00:02:47	/SSPublic	DEV2K8SS2010-5	VC-1 IIS Smooth Streaming - HD 720p VBR	☑	Restart Encoding
Video Stream Timeline Comments in Feature in 3.5_1c97f9e5-b2a4-4a9b-a56c-00e22bccd26f.wmv	Done	Ready to watch	1/30/2013 7:20:05 PM	1/30/2013 7:20:17 PM	1/30/2013 7:21:09 PM	00:00:52	/SSPublic	DEV2K8SS2010-5	NG.CommandLine.ProgressiveMobileH264.txt	☑	Restart Encoding
ScreenCastVideo-20130130-144218_06177bed-0e98-40e6-befe-84b41cc90714.wmv	Done	Ready to watch	1/30/2013 7:10:06 PM	1/30/2013 7:10:25 PM	1/30/2013 7:10:47 PM	00:00:21	/SSPublic	DEV2K8SS2010-5	VC-1 IIS Smooth Streaming - SD 480p VBR	☑	Restart Encoding
ScreenCastVideo-20130130-144218_06177bed-0e98-40e6-befe-84b41cc90714.wmv	Done	Ready to watch	1/30/2013 7:10:06 PM	1/30/2013 7:10:17 PM	1/30/2013 7:10:25 PM	00:00:08	/SSPublic	DEV2K8SS2010-5	NG.CommandLine.ProgressiveMobileH264.txt	☑	Restart Encoding

The encoding console lists all uploaded videos for the given farm sorted by the up-loaded time. The console displays the following for each uploaded video: encoding progress, encoding status, upload time, encoding start and end time, encoding duration, the site that the video was uploaded from, the encoding service, the encoding preset, whether the original is stored and an option to retstart encoding. There are six different encoding states: pending, encoding, encoded, failed, cancelled and ready to watch. Video Stream only supports one encoding service and so this is primarily for future use (although it will give visibility to an encoding service name change). The encoding preset refers to the default encoding settings used by Microsoft's Expression Encoder for a given input video profile (codecs, bit rates etc.) These settings include things like the audio and video bite rates. Console entries can be filtered by the encoding status, site, encoding service and preset. They can be sorted by upload time and start and end encoding.

When a video fails encoding, the error message can be viewed by clicking on "view details" beside the "failed" status indicator. If the error has been addressed or re-encoding is otherwise warranted, clicking on the Restart Encoding button will re-initiate the encoding process. The status should immediately (and, possibly briefly) change back to "Pending".

Verifying your configuration and making other changes

The NewsGator Video Stream Service Application management area in Central Administration supports a couple of key features:

- Configuration verification
- Configuration changes

After Video Stream has been configured and installed, some aspects of the configuration can be verified including permissions to the pending-encoding folder and the encoded-video folder and access to the streaming server. Clicking on the Verify button will produce a Verification Report. In future releases, this report will support other aspects of the configuration including encoding and streaming server access to the Video Stream video database. Changes to the Video Stream configuration (initially specified in install process) can also be made on this page. See the screen shots below for an example of this page and sample output of the verification report.

Third-party Video Solution Integration

Azure Media Services (SharePoint 2013 only)

Video Stream supports an option to use Azure Media Services (AMS) in lieu of its native support for video file storage, encoding and streaming.   Azure Media Services can be used to replace file storage and/or encoding and/or streaming. To enable AMS, you will need to configure the AMS properties and then set the Video Stream Service Providers accordingly. To configure AMS support, go to Central Administration/Manage Service Applications/NewsGator VideoStream Service Application. Select Configuration under Azure Media Services Integration.

To access Azure Media Services you will need to specify your Media Service Account Number and Media Service Access Key.

You can also change a number of specific thresholds that support:

a) how long a video url is available (default is 24 hours)
b) the amount of time that must be left between current time and url expiration before a new url is provisioned (default is 120 minutes)
c) time to wait when a new video url is created before it is returned to the user (default is 40 seconds)

There are two additional options that can be checked (but aren't by default):

a) Keep source files on Azure after transcoding is done
b) Keep generated thumbnails on Azure after transcoding is done

Azure Media Services Properties

Azure Media Services account information

Azure Medi Service account information used to access the Azure platform.

Media Service Account Name

Media Service Access Key

Thresholds

Different thresholds to control how long a video url is available, time that must be left between current time and url expiration before a new url is provisionned and time to wait when a new video url is created before it is returned to the user.

Time in hours a locator (Url) to a video is valid

24

Time in minutes between current time and video locator expiry before a new locator is created

120

Time in seconds to wait after a locator is created.

40

☐ Keep source files on Azure after transcoding is done

☐ Keep generated thumbnails on Azure after transcoding is done

OK   Cancel

To actually enable the use of Azure Media Services, go to Central Administration/Manage Service Applications/NewsGator VideoStream Service Application/Application properties and set the Video Stream Service Providers accordingly as seen below:

Video Stream Service Providers

Configure which provider is used to provide video transcoding and streaming services.

Service used for video transcoding

Azure Media Services Video Stream Encoder ▼

Service used for video streaming

Azure Media Services Video Streaming ▼

Kontiki integration

Video Stream supports a feature that integrates with Kontiki. Kontiki is a peer-to-peer based CDN that minimizes the load on WAN's for network and storage intensive applications like video. When enabled, Kontiki handles the storage and streaming components with Video Stream supporting the encoding. For end-users, the Video Stream experience is the same as using the Video Stream default infrastructure. Please see *Appendix O - Sitrion Social Video Stream Kontiki Integration* for more details.

Brightcove integration

Video Stream supports a feature that integrates with Brightcove for both uploading and playback of video. Please see *Appendix P - Sitrion Social Video Stream Brightcove Integration* for more details.

Kaltura integration

Video Stream supports a feature that integrates with Kaltura for both uploading and playback of video. Please see *Appendix – R – Sitrion Social Video Stream Kontiki Integration* for more details.

Other Third-party video solution integration

Video Stream was designed to integrate with other enterprise-grade video solutions. The various components of Video Stream including the encoding server, the streaming server and the player can be substituted with third party components.

Sitrion Social Video Stream Module Troubleshooting

The first thing to do if something does not work

The easiest way to verify the major Video Stream settings is to use verification functionality on the Video Stream service application properties page. The get to the page to to Sharepoint Central Administration -> Manage Service Applications -> NewsGator VideoStream Service Properties page. Click the Verify button and the Verification Report will appear. If there are any errors resolve them before proceeding with Video Stream troubleshooting.

Note: the verification feature works only if used from the Default Zone.

Top-level Overview of Video Stream Workflow

Video Is Uploaded By User

For more information on diagnosing issues with this step see the "**Video Upload**" section below.

SharePoint job copies Video to Encoding Service Input Folder.

The Video Stream Management Job will copy any uploaded video from the Video Stream asset library in a community to the Encoding Service input folder.

For more information on diagnosing issues with this step see the "**SharePoint job copies Video to Encoding Service Input Folder**" section below.

Encoding Service Encodes Video

For more information on diagnosing issues with this step see the "**Encoding Service Encodes Video**" section below.

SharePoint job copies Video to Streaming Server

For more information on diagnosing issues with this step see the "**SharePoint job copies Video to Streaming Server**" section below.

Video is Available for Viewing

For more information on diagnosing issues with this step see the "**Issues Viewing Video**" section below.

Video Upload

What Should Happen?

When a user uploads a video, it should get copied to the **NewsGator Video Library** asset library in the community it was uploaded to.

Possible issues

Upload Video button

Users must use the "**Upload Video**" button on the Video Center page. Videos can't be uploaded via the attachment icon on the Activity Stream web part.

Large File Uploader Temp Directory

The service account of the SharePoint Web Application containing the community will need read/write access to the Large File Uploader temporary folder. For more information on this configuration parameter see "Appendix A – Video Stream SharePoint Configuration".

Other upload errors

To diagnose these, turn on the upload log by following these steps:

1. Right-click on Upload Video button and select "Open in New Window".
2. Add "&ngDebug=1" to URL to enable debugging.   See example of debug window below:
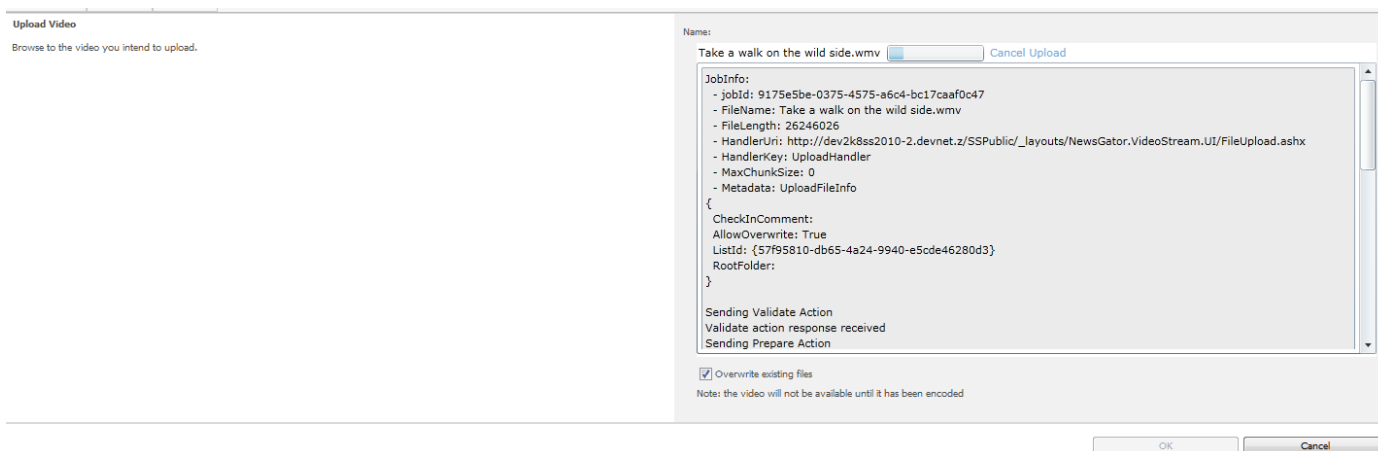
SharePoint job copies Video to Encoding Service Input Folder

What should happen?

After the VideoStream Management Job runs successfully the following should happen:

1. User who uploaded video should see "**Your video has been queued for encoding**" message in their activity feed. See **Appendix F – Video Stream Activity Stream Messages** for more information.
2. Video should get copied to a folder in the Encoding Service input folder. The folder will be named with a GUID instead of the original file name. The Videos table in the Video Stream database can be used to match a GUID to the corresponding video name. See "**Appendix B – Database Tables**" for more information.

If any of the above results have not happened, check through the following list of possible issues.

Possible issues

SharePoint Timer Service

Video Stream uses a SharePoint job to coordinate the encoding process. Open the Services Snapin and verify the SharePoint Timer service is in the running state.

SharePoint VideoStream Management Job Definition

Make sure the VideoStream Management Job is defined.

From Central Administration under Monitoring click Review Job Definitions. Look through the list of job definitions and make sure **NewsGator VideoStream Management Job** is present. Click on "NewsGator VideoStream Management Job" and make sure it is running at least every 5 minutes.

SharePoint VideoStream Management Job is failing

1. Upload a new video to a Video Center in a test community.
2. Wait for the NewsGator VideoStream Management Job to run (or trigger it manually).
3. From Central Administration under Monitoring click Review Job Definitions. Now click **Job History**.
4. Ensure the last time **NewsGator VideoStream Management Job** ran, its status was "**Succeeded**".

Permissions

Ensure that the SharePoint farm account has read/write access to the Encoding Server's input and output folders (and associated File Shares if applicable).

Encoding Service Encodes Video

What Should Happen?

Encoding Service should:

1. Encode the video
2. Copy the encoded output to the Encoding Service output folder

If any of the above results have not happened, check through the following list of possible issues.

The status of videos being encoded as well as possible errors can be checked in the Encoding Console. See "Appendix L: Video Stream - Encoding Console".

Possible Issues

Errors

The encoding service logs all its errors and warnings to the Event Viewer log. To find this log open the Event Viewer application on the server running the Encoding Service and open the log Applications and Service Logs -> VideoStream. Check for any messages in this log to help diagnose issues.

Encoding Service is not running

The Encoding Service runs as a standard Windows Service outside of SharePoint. Open the Services snapin and ensure the service is in the "running" state.

Encoding Service Can't Contact the Database

The encoding service communicates directly with the Video Stream database. Ensure that:

1. The account under which the Encoding Service is running has DBO database permissions on the Video Stream Database
2. The Encoding service's configuration file is pointing to the correct database.
3. The encoding server can access the database server (for example, no firewall is blocking access).
4. If a Sql Server alias is used it should be created using 32bit version of cliconfig.exe or if created using Sql Server Configuration Manager is should be under "SQL Native Client 10.0 Configuration (32bit)" node, because Encoding Services is a 32 bit application.

If this is the issue, there will be error messages in the Encoding server error log and the video will be marked as Pending in the Encoding Console. See "**Appendix C – Encoding Service**", "Appendix L: Video Stream - Encoding Console" for more information.

An Error Occurred During Encoding

If the user who uploaded the video sees the "Video Failed Encoding" message in their activity stream, see the "**Video Failed Encoding**" section below for more information.

Debugging

Logging

See "**Appendix H – Encoding Service**" for more information on how to configure logging.

Running from command prompt

Another trick you can use to debug problems with the encoding service is to start it from the command prompt. When you do this you will immediately see errors that occur in the console. To run from the command prompt follow these steps:
1. Stop the service if it is currently running
2. Open a command prompt
3. Go to the directory where the service is installed
4. Type the following : NewsGator.VideoStream.EncodingService.exe **-run**

SharePoint job copies Video to Streaming Server

What Should Happen?

After the VideoStream Management Job runs successfully the following should happen:
1. The encoded video's output folder should get copied from the Encoding Service output folder to the Streaming Server folder. The output folder will use the matching GUID from the input folder. The Videos table in the Video Stream database can be used to match a GUID to the corresponding video name. See "**Appendix B – Database Tables**" for more information.
2. The video will now show up in the communities activity feed
3. The video is now displayed on the Video Center page.

Possible issues

Permissions

Ensure that the SharePoint farm account has read/write access to the Encoding Server's output and the Streaming Server folders (and associated File Shares if applicable).

Video Failed Encoding

A user is seeing the following message in their video stream after uploading a video file.
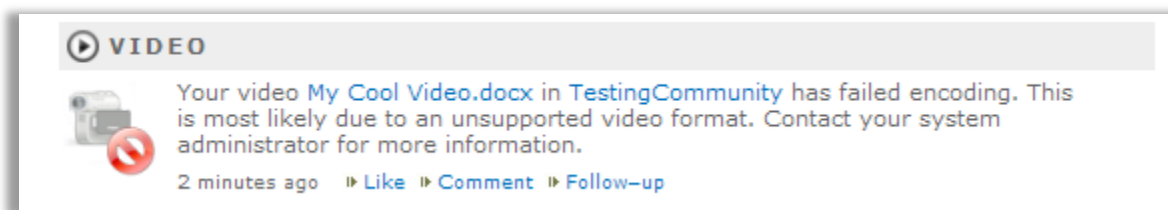
Use the Encoding Console to see the actual error. See "Appendix L: Video Stream - Encoding Console".

Possible Issues

QuickTime is not installed

It is recommended that Apple QuickTime is installed on the server hosting the Encoding Service. This application installs libraries which are required by the Encoding Service in order to support certain media formats. After installing QuickTime, the server will need to be rebooted before the new library is recognized by the Encoding Service.

Desktop Experience Feature is not installed

The Encoding Service requires the Desktop Experience Windows Server feature. You can ensure the Desktop Experience feature is installed by attempting to start Expression Encoder from the start menu. If the Desktop Experience feature isn't installed an error message will be displayed.

The Desktop Experience Feature can be installed through the Add Feature option in Server Manager. The server will need to be rebooted as part of the install process of this feature.
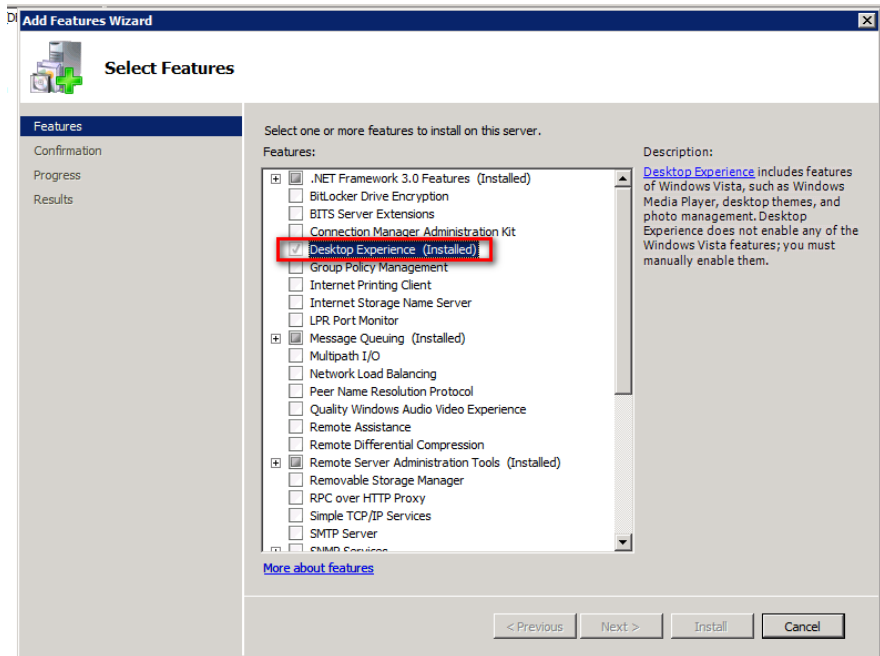
Expression Encoder is not Pro version

If this is the case, the following error will be shown in the Encoding Console (See "Appendix L: Video Stream - Encoding Console"):
Microsoft.Expression.Encoder.FeatureNotAvailableException: MP4 - This functionality is only available in the fully-featured Expression Encoder Pro....

Ensure that Expression Encoder 4 Pro is installed on the server hosting the Encoding Service. You can ensure the Pro version is installed by opening the Help -> About menu item when starting Expression Encoder for the start menu.
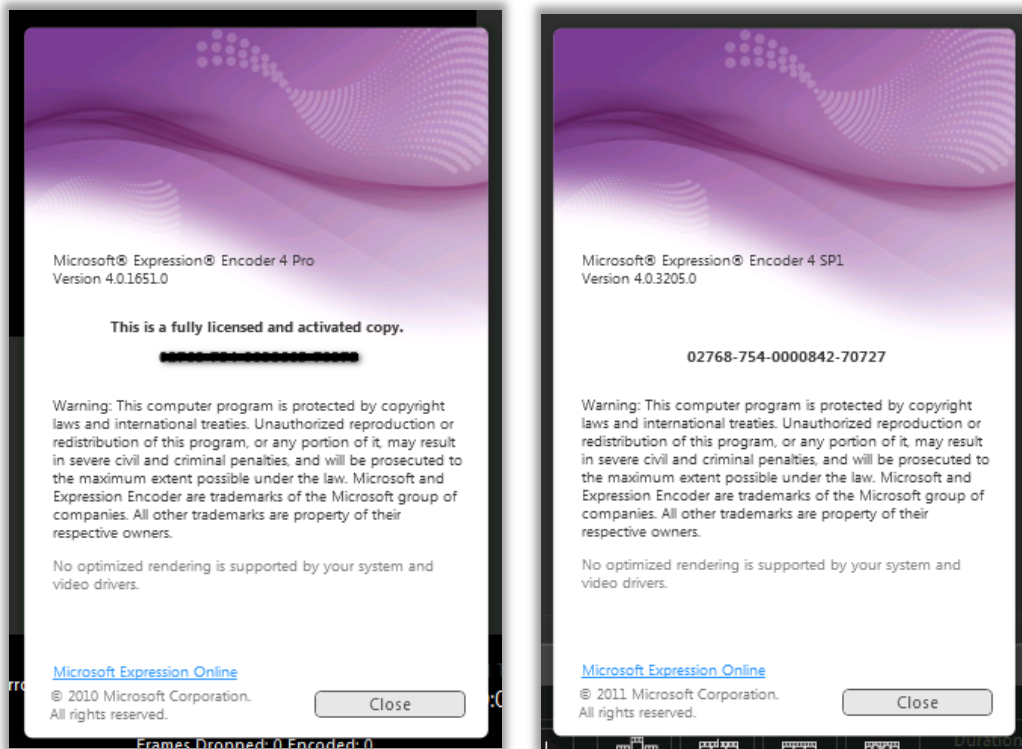
In the above images, the left hand image is for the Pro version of Expression Encoder. The right hand side shows the Free/MSDN version of Expression Encoder.

The Pro version of Expression Encoder is required to support the majority of input file formats uploaded by end-users.

If the Pro version of Expression Encoder has been installed, failed videos can be rescheduled for encoding from the Encoding Console.

Video Format is not supported

The Encoding Service uses Microsoft Expression 4 Pro to encode videos. Ensure the file format is supported by Expression Encoder. Some formats, like FLV files, are not supported.

Other Encoding Issues

If everything seems installed correctly and you are still having problems encoding videos it might be because Expression Encoder is trying to use a bad codec for decoding. Such a codec might allow the video to get encoded but when you try to view the video it does not play. There are some steps you can take to attempt to resolve such issues.

1. Log on the encoding server as the **same account the encoding service** is running as.
2. Open the "Microsoft Expression Encoder 4" UI.
3. Once it's open click on the "Tools / Options…" menu option.
4. From there select the "Compatibility" option in the left area of the "Options" dialog.
   a. If no video filter is listed
      i. You can try to disable "Allow hardware accelerated decode" and re-encode your video.
   b. If you have a list of video filters
      i. You can try and disable filters from this list and re-encode your video.
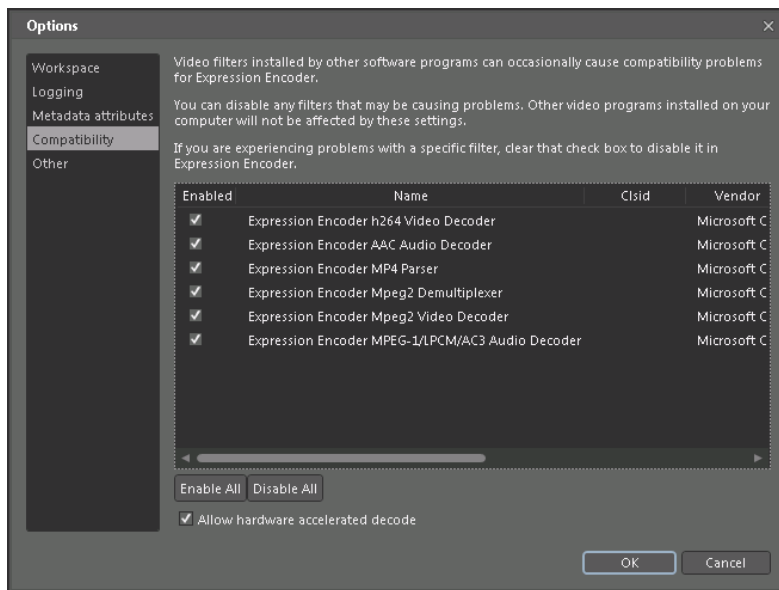
Figure 1 - Compatibility option

To mitigate codec problems you should

1. Not install codec packs you do not fully trust.
2. If you do install a codec pack you should
   a. Determine which codecs you truly need and only install those.
   b. Make sure only the ones you really want are enabled for use by Expression Encoder.

If an error is happens during the encoding process it is stored in the Video Stream database. See "Appendix B – Database Tables" for more information.   Attempting to encode the file through the Expression Encoder client may furnish for information. Failing that, the NewsGator Support team can help you with any error you encounter.

Issues Viewing a Video

What Should Happen?
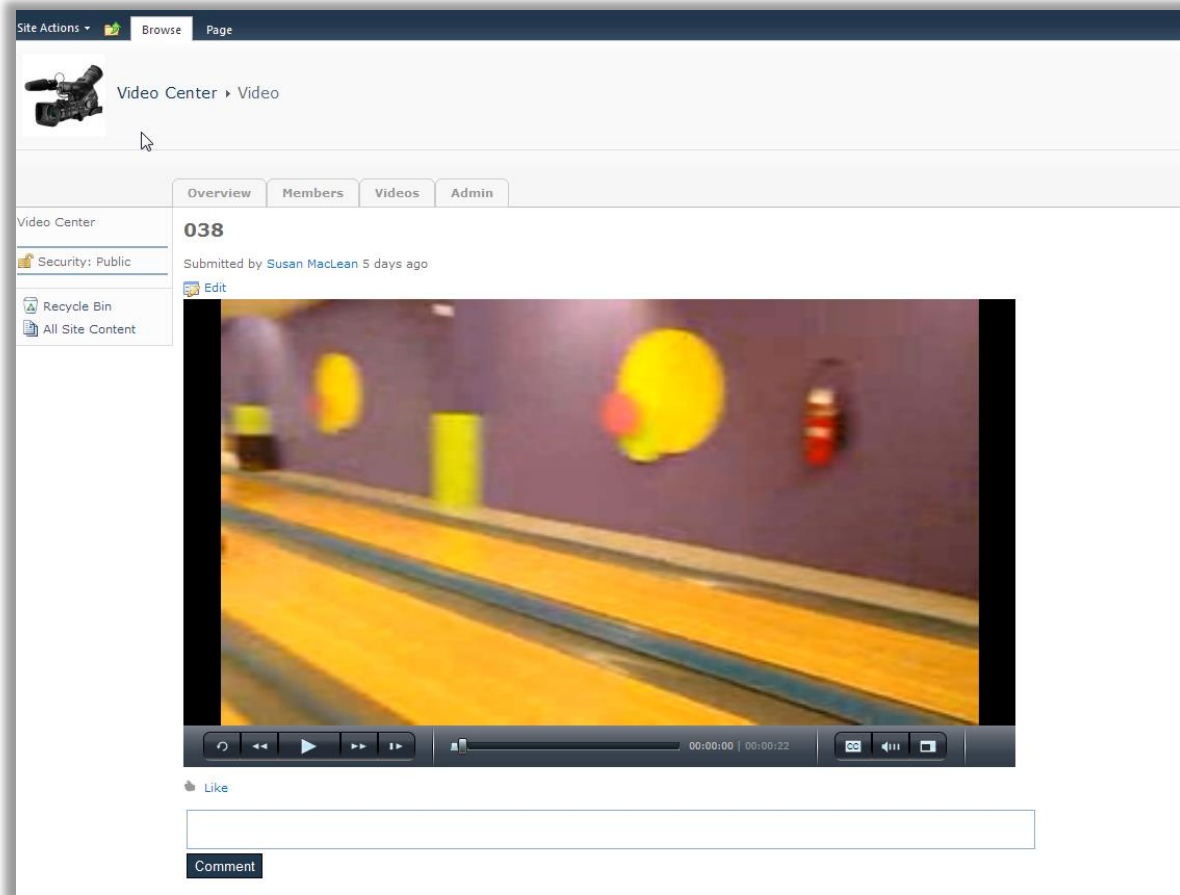
Viewing a video from a video's video page, should play the video.

Possible Issues

Errors

The streaming server logs all its errors and warnings to the Event Viewer log. To find this log open the Event Viewer application on the server running the Streaming Server website and open the log Applications and Service Logs -> VideoStream. Check for any messages in this log to help diagnose issues.

SharePoint is not pointing to the correct streaming server

The VideoStream module in SharePoint is configured to point to the Stream Server. The Streaming Server is separate website hosting encoded videos outside of SharePoint (See the **Video Stream Install and Configuration guide**).

Ensure the streaming server address of the Video Stream SharePoint Configuration (See **Appendix A – Video Stream SharePoint Configuration** guide) is pointing to the correct address.

To test the streaming server address:

1. Open a web browser on workstation outside of the SharePoint farm.

2. Copy the streaming server address and paste into the browser's address bar and hit enter.

3. A page saying "**Hello from the streaming server!**" should be displayed.

4. Modify the url by adding /Test.aspx at the end. The test page with Video Stream and database versions should be displayed.

dev2k8ss2010-2:8080/Test.aspx
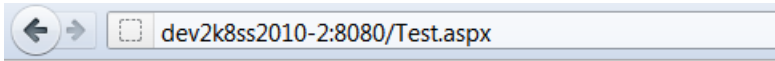
ASP.NET is installed

Versions:

Running : 2.5.0 (2.5.12024.5)

Database : 2.5.0 (2.5.12024.5)

GOOD: Database and code versions match.

5. Make sure the streaming server url is exactly the same as set in the NewsGator VideoStream application configuration window (**Appendix A – Video Stream SharePoint Configuration**). If videos are stored in a subfolder on the streaming server, the url should contain it, i.e. http://dev2k8ss2010-1:8000/**videos**. The url should always have the protocol part (http/https).

If this page is not displayed then:

1. The address is wrong
2. A firewall or similar is blocking access to the website
3. Streaming Server component is not installed.

IIS Media Extensions Are Not Installed

The streaming server requires IIS Media Extensions 4 to be installed. See the VideoStream Install and Configuration guide for more information. The typical symptom is the following error message in the player debug window: "Error - Failed to download manifest: d".

ASP.NET is not installed

If a 404 error is returned when trying to download the manifest and the log file is not created it means that the NewsGator code isn't executed. It may happen if ASP.NET is not enabled. To see if ASP.NET is enabled or not go to Server Manager, Roles, scroll to Web Server (IIS) the role should be installed and ensure that the Web Server (IIS) role has the ASP.NET Role Service installed.

ASP.NET must use version v3.5 SP1 or v3.5.1 (for Windows 2008 R2) of the .NET framework. To check what version is installed look for the following DWORD in the registry:

HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\NET Framework Setup\NDP\v3.5\SP – Make sure this DWORD is at least 1. If this DWORD doesn't exist, you are not running 3.5 SP1 / 3.5.1 .
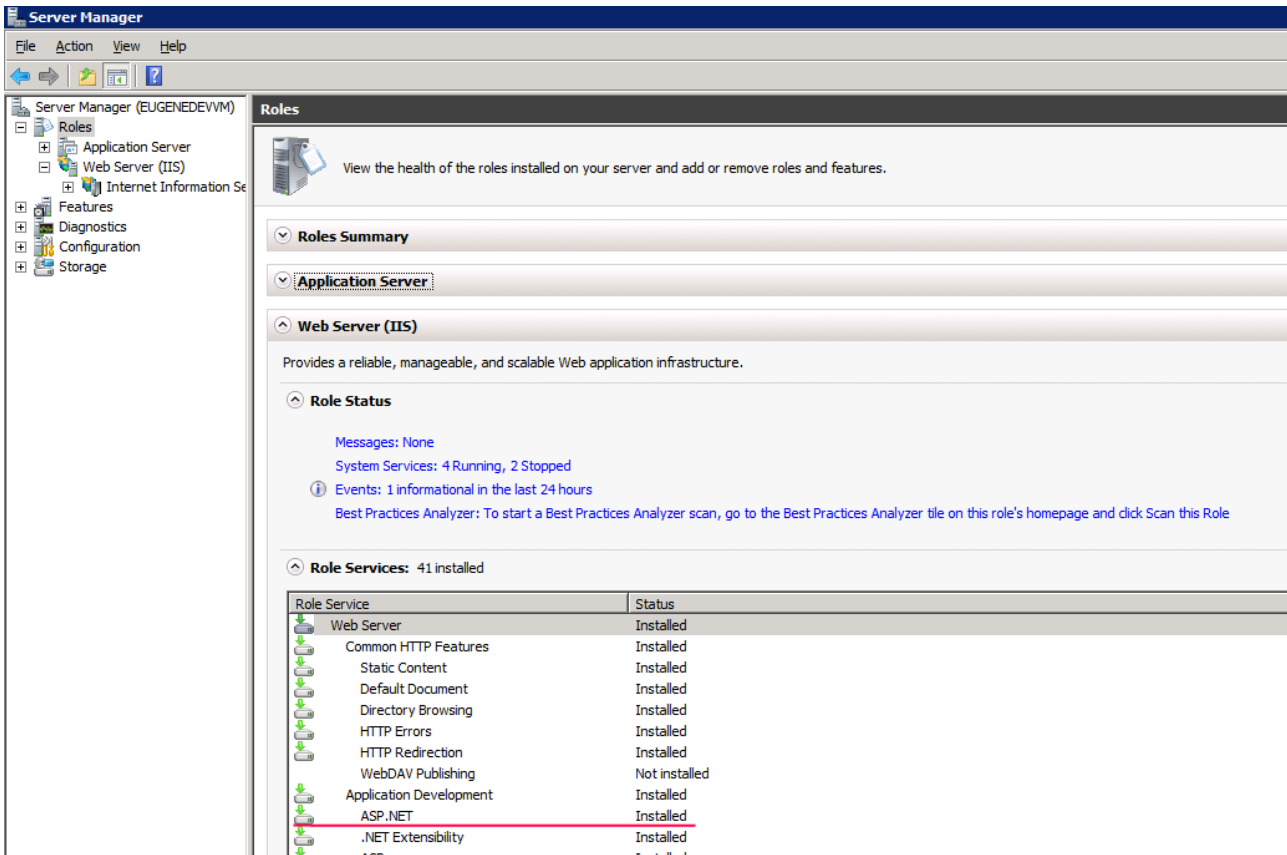
Streaming server does not have access to the video database

1. Ensure that the database connection string in the web.config file of the Streaming Server is pointing to the correct database.
2. If the connection string is set to use integrated security you must also ensure the application pool account the video stream site is using has access to the database.

See **Appendix D – Video Stream Server / Streaming Server Database Connection**

Anonymous account does not have access to the video stream folder

1. Goto IIS / Web Site / Authentication
2. If Anonymous Authentication is set to Enabled
3. Edit settings and configure anonymous to use the "Application pool identity"

4. Goto the streaming folder and ensure the application pool account has rights to the folder.
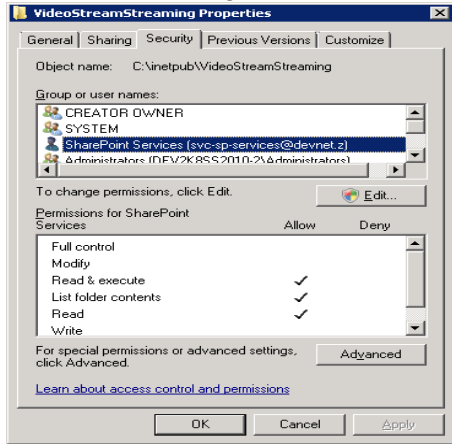
Local time mismatch between Sql server and Video Stream server

Make sure that the local timezone is the same for Sql server and Video Stream server.

URL Access Restrictions in Silverlight

The Silverlight technology used by Video Stream player limits certain types of requests to prevent security vulnerabilities.

- **Cross-zone URL**
  Videos will not play if sharepoint server and Video Stream server are in different zones.

Wrong	Correct
SharePoint: http://sharepoint.companydomain.com **Video Stream**: http://videos:1111	**SharePoint:** http://sharepoint.companydomain.com **Video Stream:** http://videos.companydomain.com:1111

- **Cross-scheme URL**
  Videos will not play if sharepoint server is using https and Video Stream server uses http.

Wrong	Correct
SharePoint: https://sharepoint.companydomain.com **Video Stream**: http://videos.companydomain.com:1111	**SharePoint:** https://sharepoint.companydomain.com **Video Stream:** https://videos.companydomain.com:1111

For more information about url access restrictions in Silverlight, please refer to MSDN documentation:
http://msdn.microsoft.com/en-us/library/cc189008%28VS.95%29.aspx

IIS Request Filter is blocking requests

If you are seeing "failed to download manifest" in the Video Player's debug logs (see Turning on Debug log in Appendix E), then it is possible that IIS request filtering is blocking the request.

This issue exhibits itself as a 404 response when requesting any URL with the file extension .ism.

The easiest way to see if this is the case is copying the manifest URL from the Video Player's debug logs and opening this URL in a web browser. The URL looks something like this (it will be different for your deployment):

http://videoserver01 /1a5cad5a-5ad2-481e-adc2-cd1cadb21404/smoothstream/tk_dyeZ6bhL6qhsOKOyBfm6/1a5cad5a-5ad2-481e-adc2-cd1cadb21404.ism/manifest

Note: To get more information about why the 404 response is happening try to open the URL using a web browser on the streaming server. See Appendix I. If you see a response exactly like the following it means request filtering is blocking the request:
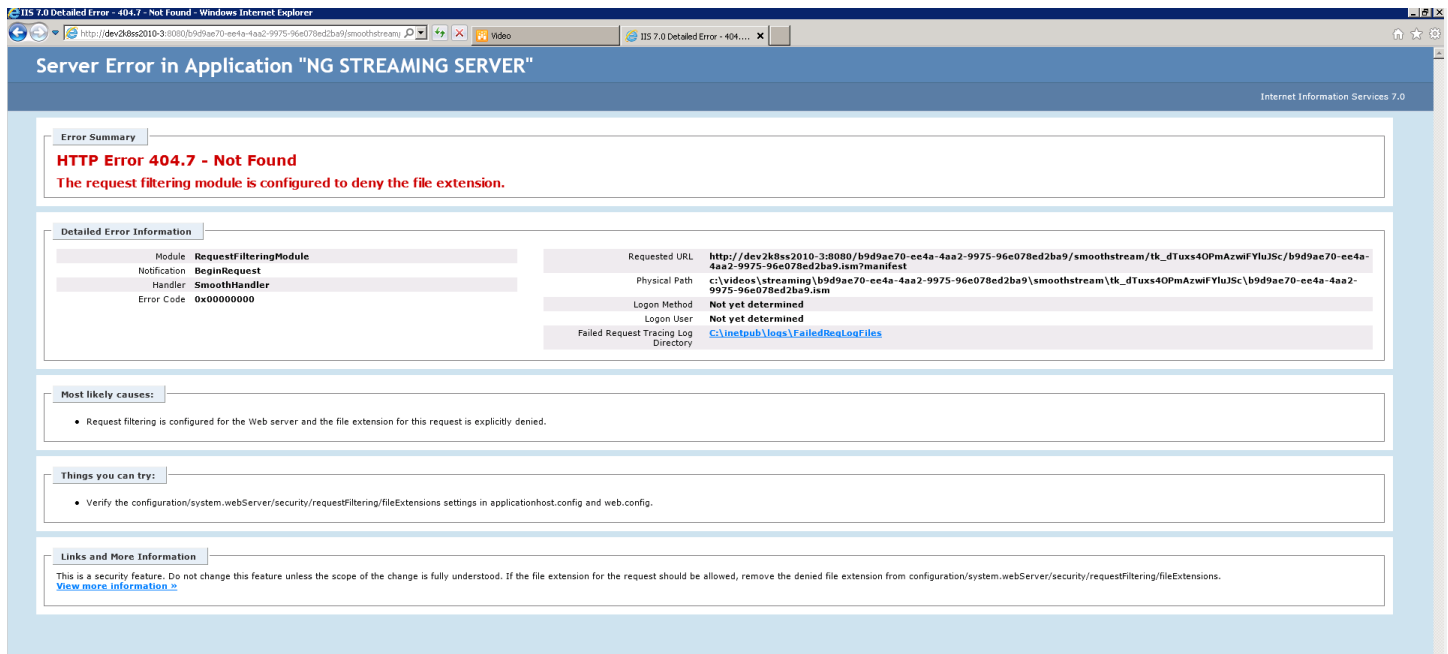
VideoStream should add .ism files to the allowed list however, if entry is not working properly, you will have to use IIS Manager to fix the issue.

1. Open IIS Manager on the Streaming Server
2. Open the web site hosting the Streaming Server site (usually ngvideos).
3. Click on Request Filtering in the IIS section on the middle pane
   a. If you are running Windows 2008 R2 and you don't see the request filtering option this means the Request Filtering Role Service is not installed and therefore Request Filtering is not active.
   b. If you are running Windows 2008 and you do not have the Request Filter Role Service this means Request Filtering is not active.

   If you are running Windows 2008 and you have the Request Filter Role Service installed but you don't see the Request Filter option this means you need to download and install the "IIS Administration Tool" available from Microsoft)

4. Click on the File Name Extensions tab
5. Find .ism in the list
   a. If .ism is not in the list, click on "Allow File Name Extension" in the Actions pane.
      i. In the "File name extension" field type: ".ism"
      ii. Click Ok
   b. If .ism is in the list, make sure it is set to allowed

Issues Viewing a Video from the Activity Stream

What should happen?

Video should be playable from a community or user's Activity Feed.

Before clicking on a video the activity feed item should look like this:
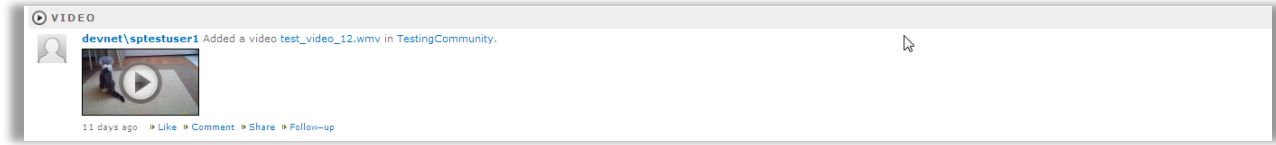
Notice that a play icon is displayed over top of the video's thumbnail.

When clicking the video's thumbnail the video should play right from the Activity Feed. See the following image.
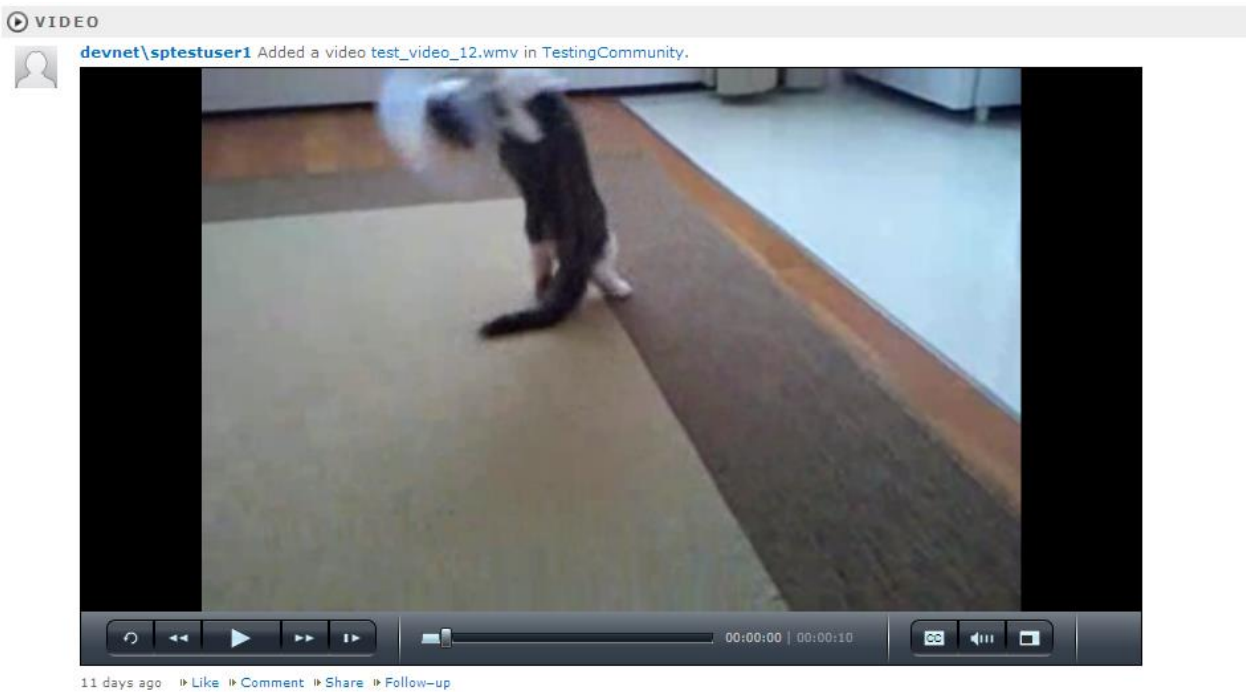
Possible Issues

NewsGator VideoStream to Activity Feed Integration Feature is Not Activated

Make sure the **NewsGator VideoStream to Activity Feed Integration feature** is enabled for the site you are trying to watch the video from. This feature should be activated for all Sitrion Social communities and for the **My Site** site collection.

Sitrion Social Enrich

Overview

The Enrich module for Sitrion Social provides a number of features that help peers capture and share some of the valuable tacit knowledge that they don't have an easy way of sharing and organizing otherwise.

The Knowledge Base feature provides a way for peers to conveniently create knowledge base articles from various sources including web pages, micro-blog posts, questions and documents.   Users can easily create an article from a web page using a bookmarklet and provide a description as to why the URL may be helpful to others.   Regular micro-blog and Q&A posts can easily be added as a knowledge base article for easier discoverability and searching. Finally, knowledge base articles can be created for documents so that additional data about the document itself, its meaning and usage can be documented.   Inline commenting on all of these articles (on the page itself or in the stream) provides a way for peers to comment and ask additional questions about these articles often leading to additional and valuable meta-data.

The Video Scenario feature is a specialized way of using video to engage social learners about a situation or problem or case study. Here's how it works.   The user watches an initial video describing a scenario.   The user must then comment on how they would address the scenario before being able to watch the "outcome" video and see the comments from other scenario participants.   Creating a new video scenario is as easy as uploading two videos.

Prerequisites and Compatibility

The Enrich 5.0 (and later) module requires Sitrion Social 5.0 (or matching version number). Optionally Spotlight 5.0 (or later) can be used to create badges to recognize users who create a high number of knowledge base articles and video scenarios.

In order to use the Video Scenarios component of the Enrich module Video Stream 5.0 will also be required.

Knowledge Base

There are three main use cases for the Knowledge Base. The first use case is the community knowledge base.   This is ideal for knowledge bases supporting a specific domain like a particular product line.   The second use case is for a global knowledge base which works well for corporate content that applies to all staff.   Finally, there is support for the personal knowledge base for tracking content for your own reference.

Enabling the Knowledge Base Feature

To turn on the Knowledge Base feature for a given community or site (including My Content), go into Site Settings, Manage Site Features and activate the *NewsGator Knowledge Base (Web)* feature.   To specify which community or site contains the global knowledge base go to Central Administration, Application Management, Manage Service Applications and select the NewsGator Learning Point Service and fill in the URL as seen below.   Since the knowledge base items are stored in a Wiki Library, permissions to add and view these items is controlled by access to this list.
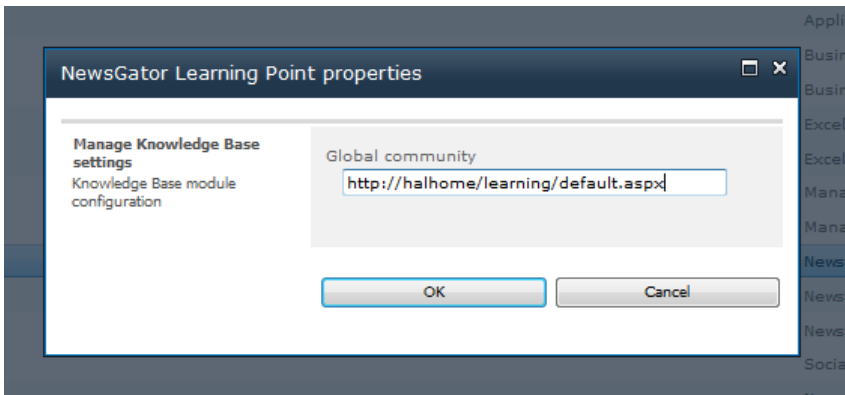
Multi-farm support

For Knowledge Base, articles can be created in knowledge bases that exist in the same farm from which you are posting.   The simplest example of this is creating an article from a stream in the same community that you are targeting the publication of the article.   The Add to Knowledge Base page only shows Knowledge Bases that the currently logged in user has rights to add to. This page will only ever show Knowledge Bases from the same farm as the page currently being viewed. Knowledge Base entries are also added via a bookmarklet in the browser. The bookmarklet will only let you add Knowledge Base articles to the same farm from which you originally added the bookmarlet to your browser. (NOTE for technical readers: Enrich needs only one Enrich Service App. It should be deployed to the same farm as the Sitrion Social Service App. The Enrich service app should be consumed by child farms.)

Video Scenarios

Enabling the Video Scenarios Feature

To turn on Video Scenarios for a given community or site, go into Site Settings, Manage Site Features and activate the *Newsgator Video Scenarios (Web)* feature.

Sitrion Social Mobile Module v3.5+

Overview

The Mobile module for Sitrion Social consists of native client apps for specific phones/devices like iPhone/iPad, Android, and Windows Phone 8.

Lookout Mobile Web provides a mobile option that can be used across multiple smartphones. The smartphone browser accesses the mobile page, and the functionality is all delivered through the phone browser without the need to install additional software on the phone.

☞	FIND MORE INFORMATION:
	Sitrion Social v5.5 Planning and Installation Guide
	Sitrion Social v5.5 User Guide

Supported authentication methods

The Sitrion Social mobile clients will work with either Classic or Claims based authentication modes, when used with the following methods: Basic over SSL and NTLM. ADFS is also supported. If one of these methods isn't in use the mobile clients may not work properly. Forms based and SAML are not currently supported.

Supported Sitrion Social server version

Sitrion Social native apps for iOS and Android will work with server versions 3.1 and above. Windows Phone 8 will work with server version 3.5 and above.

Supported Devices and Operating System Requirements

Native mobile apps

The following OS versions are supported for the native mobile apps:

- iOS version 8+. The app is universal, meaning that it is formatted for both iPhones/iPod Touch and iPad.
- Android OS version 4.4+
- Windows Phone 8.1

Lookout Mobile web

The browsers on mobile phones can vary greatly. Lookout Mobile Web is designed to work with the most common ones, but one of the key considerations can be how the browser handles authentication. Firefox (on Android) and Mercury Web Browser (on iPhone) can both save username and password to make access easier. (Screenshots provided here are taken with Safari browser on iPhone.)

Mobile Settings in Central Administration

These settings can be found within SharePoint Central Administration. Navigate to Service Applications > NewsGator Social Platform Services. From here you can access Mobile Settings. It is located in the Configuration section. The iOS and Android applications adhere to these settings. Windows Phone 8 hasn't yet been enabled.

1. Specify whether or not the mobile device should remember a user's password.

2. Specify the length of time the app remembers a user's credentials and keeps them logged in.

3. Specify if links within the Activity Stream should be disabled based on a file extension.

4. Whether or not the mobile client should allow documents to be downloaded.

5. Whether or not push notifications should be enabled.

Lookout Mobile Web Administration

Lookout Mobile Web has only two settings. They are right below the other mobile settings in Central Administration.

The title setting is intended to give a simple branding experience to help users know this interface is part of their broader intranet / Sitrion Social deployment. For example, at Sitrion, the intranet is named "Hal", so here we use "Hal Lookout" as the title in the mobile browser.
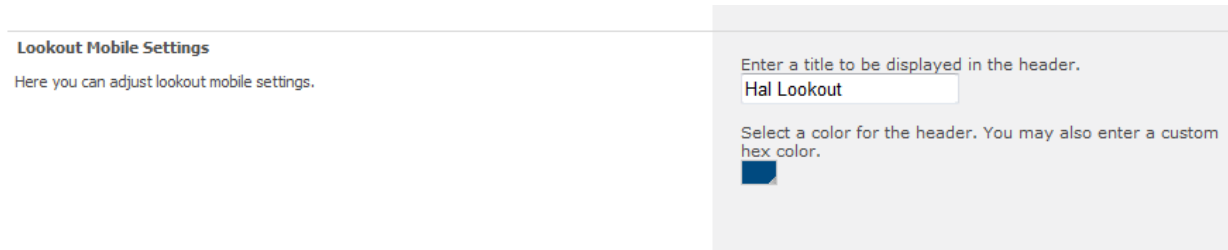
The color option gives a simple way to make the header color match a standard color you use on your intranet.

Mobile API Endpoints

Overview

The _vti_bin directory lives in many places within SharePoint. There is a _vti_bin directory in each community, and for each user in the system. Sitrion endpoints live within the subfolders of "ng" and "ngc", and SharePoint scripts live in the root level of _vti_bin

The iOS/Android/Windows Phone 8 clients will not only need access to these endpoints, but also to the URLs that are passed around in the activity stream, or to any urls to attached media or documents that are attached to the individual activities.

Version 2.0

/_vti_bin/ng/activityfeedpolicy.svc/ - gets the activity feed policy for the context

/_vti_bin/ng/activityfeed.svc/ - gets the activity feed for the context

/_vti_bin/ng/Colleague.svc/ - Gets colleague info for the context

/_vti_bin/ng/Colleague.svc/Recommended/ - recommended colleagues

/_vti_bin/ng/userprofile.svc/ - Gets my profile

/_vti_bin/ng/userprofile.svc/username - Gets a users profile

/_vti_bin/ng/eventnotification.svc/ - Gets notifications for a context

/_vti_bin/ngc/CommunityService.svc/Members/ - Gets members of a community

/_vti_bin/ngc/CommunityService.svc/Groups/ - Gets my communities

/_vti_bin/ngc/CommunityService.svc/Recommended/ - Gets communities recommended for me

/_vti_bin/ngc/CommunityService.svc/Groups/Search/?term=%@ - Searches for communities

/_vti_bin/ng/nm/newsmanager.svc/event/%@/ - Gets the RSS feed of news items for a news item event

/_vti_bin/ng/Colleague.svc/Add/%d/ - Adds a colleague for the logged in user

/_vti_bin/ng/activityfeed.svc/comment/%@/ - Posts a comment for the activity id given

/_vti_bin/ng/eventnotification.svc/ - Mark a notification as read

/_vti_bin/ngc/CommunityService.svc/Join/ - join a community

/_vti_bin/ngc/CommunityService.svc/Leave/ - leave a community

/_vti_bin/ng/idea/idea.svc/Context/ - post a new idea

/_vti_bin/ng/Colleague.svc/Ignore/%d/ - ignores a colleague

/_vti_bin/ng/activityfeed.svc/like/%@/ - posts a like for a status id

/_vti_bin/ng/FileService/UploadToMySite.ashx" - upload a picture status or video

/_vti_bin/ng/activityfeed.svc/ask/ - ask a question

/_vti_bin/ng/activityfeed.svc/ - post a status

/_vti_bin/ng/activityfeed.svc/vote/%@/ - vote for an idea

/_vti_bin/lists.asmx - used to get both the collection of lists for a user as well as their content

Version 2.1

This version includes client specific endpoints. These are included within /_vti_bin/ng/Client.svc

/_vti_bin/ng/Client.svc/help/

/_vti_bin/ng/Client.svc/ntlm/help/operations/{method}/

/_vti_bin/ng/Client.svc/help/operations/{method}/

/_vti_bin/ng/Client.svc/Ping/ - Tests the connection to the service and returns true or false

/_vti_bin/ng/Client.svc/Me/ - Gets the currently logged in users information, as well as colleagues and community memberships.

/_vti_bin/ng/Client.svc/User/?accountName={accountName}&id={id} - Gets the information about a user, does not include their colleagues or communities.

/_vti_bin/ng/Client.svc/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the feed for the logged in user.

/_vti_bin/ng/Client.svc/{authorId}/{eventKey}/ - Gets a specific feed entry.

/_vti_bin/ng/Client.svc/Community/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the feed for the given community, url is context sensitive.

/_vti_bin/ng/Client.svc/Context/{contextId}/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the feed for the given context.

/_vti_bin/ng/Client.svc/Community/Members/ - Gets the members for a community.

/_vti_bin/ng/Client.svc/Community/{eventKey}/ - Gets a specific feed entry for a given community, url is context sensitive.

/_vti_bin/ng/Client.svc/SignOut/ - Kills the logged in users authentication cookie.

/_vti_bin/ng/Client.svc/System/ - Gets information about the current installation of Social Sites, including version, installed modules, and available feed filters.

/_vti_bin/ng/Client.svc/TopTags/?max={maxCount} - Gets popular tags from the system.

/_vti_bin/ng/Client.svc/TagSuggestions/{tag}/?maxItems={maxItems} - Gets tag suggestions from the system.

/_vti_bin/ng/Client.svc/Notifications/?max={max} - Gets currently logged in user's notifications.

/_vti_bin/ng/Client.svc/Deleted/?start={start}&end={end} - Gets an array of deleted event keys between a given date range.

POST Methods:

/_vti_bin/ng/Client.svc/Microblog/ - Submits a microblog to the activity stream.

/_vti_bin/ng/Client.svc/Community/Microblog/ - Submits a microblog to a communities activity stream, url is context sensitive.

/_vti_bin/ng/Client.svc/Community/{identifier}/Microblog/ - Submits a microblog to a communities activity stream.

/_vti_bin/ng/Client.svc/Ask/ - Submits a question to the activity stream.

/_vti_bin/ng/Client.svc/Community/Ask/ - Submits a question to a community activity stream, url is context sensitive.

/_vti_bin/ng/Client.svc/Answer/{eventKey}/{eventAuthorId}/ - Submits an answer to a question to the activity stream.

/_vti_bin/ng/Client.svc/MarkAnswer/{metaId}/ - Marks an answer as a valid answer to a question to the activity stream.

/_vti_bin/ng/Client.svc/Answer/{metaId} - Unmarks an answer as the answer to a question.

/_vti_bin/ng/Client.svc/Answer/{metaId}/x/ - Unmarks an answer as the answer to a question.

/_vti_bin/ng/Client.svc/DirectMessage/ - Submits a direct message to the activity stream.

/_vti_bin/ng/Client.svc/Share/{eventKey}/{eventAuthorId}/ - Shares an activity entry.

/_vti_bin/ng/Client.svc/Like/{eventKey}/{eventAuthorId}/ - Likes a feed entry.

/_vti_bin/ng/Client.svc/Like/{metaId}/x/ - Unlikes a feed entry.

/_vti_bin/ng/Client.svc/Vote/{eventKey}/ - Votes on an idea.

/_vti_bin/ng/Client.svc/Vote/{metaId}/x/ - Deletes a vote on an idea.

/_vti_bin/ng/Client.svc/Poll/{eventId}/{pollId}/ - Answers a poll.

/_vti_bin/ng/Client.svc/Poll/{metaId}/x/ - Deletes an answer to a poll.

/_vti_bin/ng/Client.svc/Comment/{eventKey}/{eventAuthorId}/ - Comments on a feed entry.

/_vti_bin/ng/Client.svc/Comment/{metaId}/x/ - Deletes a comment on a feed entry.

/_vti_bin/ng/Client.svc/FollowUp/{eventKey}/{eventAuthorId}/ - Marks a feed entry for follow up.

/_vti_bin/ng/Client.svc/FollowUp/{eventKey}/x/ - Unmarks a feed entry for follow up.

/_vti_bin/ng/Client.svc/{eventKey}/x/?authorId={authorId} - Deletes an event, authorId is optional, pass it in if you have it.

/_vti_bin/ng/Client.svc/Scores/ - Gets an array of event scores.

DELETE Methods

/_vti_bin/ng/Client.svc/Like/{metaId}/ - Unlikes a feed entry.

/_vti_bin/ng/Client.svc/Vote/{metaId}/ - Deletes a vote on an idea.

/_vti_bin/ng/Client.svc/Poll/{metaId}/ - Deletes an answer to a poll.

/_vti_bin/ng/Client.svc/Comment/{metaId}/ - Deletes a comment on a feed entry.

/_vti_bin/ng/Client.svc/FollowUp/{eventKey}/ - Unmarks a feed entry for follow up.

/_vti_bin/ng/Client.svc/{eventKey}/?authorId={authorId} - Deletes an event, authorId is optional, pass it in if you have it.

Version 3.0

Version 3.0 includes all methods present in 2.1, with one addition.

POST Method

/_vti_bin/ng/Client.svc/Like/Comment/{eventKey}/{metaId}/ - Likes a comment.

Version 3.5

Version 3.5 includes all methods present in 3.0, with the following changes. 3.5 also includes new methods that deliver pared down data for faster response times needed on mobile devices. Lookout tiles are included in this version.

Former method:

/_vti_bin/ng/Client.svc/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the feed for the logged in user.

Now:

/_vti_bin/ng/Client.svc/?filter={filter}&filterData={filterData}&pagingToken={pagingToken}&setLV={setLV} - Gets the feed for the logged in user. If filter = Tile, setLV will default to true if not provided. This will set the tile's last viewed date to the current time and essentially reset the unviewed counts.

Former method:

/_vti_bin/ng/Client.svc/Notifications/?max={max} - Gets currently logged in user's notifications.

Now:

/_vti_bin/ng/Client.svc/Notifications/?max={max}&rollup={rollup}&markRead={markRead} - Gets currently logged in user's notifications.

New in 3.5

/_vti_bin/ng/Client.svc/Community/m/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the slim/mobile friendly feed for the given community, url is context sensitive.

/_vti_bin/ng/Client.svc/Context/m/{contextId}/?filter={filter}&filterData={filterData}&pagingToken={pagingToken} - Gets the slim/mobile friendly feed for the given context.

/_vti_bin/ng/Client.svc /Dashboard/?tileId={tileId}&pagingToken={pagingToken}&all={all} - Gets the lookout dashboard. If all=true, this will return the default newsfeed, top communities and top colleagues.

/_vti_bin/ng/Client.svc /Tiles/ - Gets the lookout tiles for the current user.

/_vti_bin/ng/Client.svc /Dashboard/settings/ - Gets branding and system settings for lookout mobile client.

/_vti_bin/ng/Client.svc /Localize/?culture={culture} - Gets culture resource for lookout mobile client.

/_vti_bin/ng/Client.svc /Localize/{resource}/?culture={culture}&assmName={assmName} - Gets culture resource for lookout mobile client.

/_vti_bin/ng/Client.svc /Sync/?filter={filter}&filterData={filterData}&syncDate={syncDate}&setLV={setLV} - Gets the latest items in a feed for the logged in user using the syncDate provided. A maximum of 100 new items will be returned. If filter = Tile, setLV will default to true if not provided. This will set the tile's last viewed date to the current time and essentially reset the unviewed counts.

/_vti_bin/ng/Client.svc /Sync/m/?filter={filter}&filterData={filterData}&syncDate={syncDate}&setLV={setLV} - Gets the latest items in a trimmed down/mobile friendly feed for the logged in user using the syncDate provided. A maximum of 100 new items will be returned. If filter = Tile, setLV will default to true if not provided. This will set the tile's last viewed date to the current time and essentially reset the unviewed counts.

/_vti_bin/ng/Client.svc /Sync/Community/?filter={filter}&filterData={filterData}&syncDate={syncDate} - Gets the latest items in a feed for the given community using the syncDate provided, url is context sensitive. A maximum of 100 new items will be returned.

/_vti_bin/ng/Client.svc /Sync/Community/m/?filter={filter}&filterData={filterData}&syncDate={syncDate} - Gets the latest items in a trimmed down/mobile friendly feed for the given community using the syncDate provided, url is context sensitive. A maximum of 100 new items will be returned.

/_vti_bin/ng/Client.svc /Sync/Context/{contextId}/?filter={filter}&filterData={filterData}&syncDate={syncDate} - Gets the latest items in a feed for the given context using the syncDate provided. A maximum of 100 new items will be returned.

/_vti_bin/ng/Client.svc /Sync/Context/m/{contextId}/?filter={filter}&filterData={filterData}&syncDate={syncDate} - Gets the latest items in a trimmed down/mobile friendly feed for the given context using the syncDate provided. A maximum of 100 new items will be returned.

POST Methods

/_vti_bin/ng/Client.svc/Community/{identifier}/Ask/ - Submits a microblog to a communities activity stream.

/_vti_bin/ng/Client.svc/Notification/Viewed/{noteId}/ - Sets a notification as viewed.

/_vti_bin/ng/Client.svc /Tile/LastViewed/{tileId}/ - Sets the last viewed date for a tile to the current time.

User Agent Strings

iPhone (2010 app)

SocialSites2010iOS/<version>

For example: SocialSites2010iOS/2.5 B6

iOS (4.5)

Social%20Sites/<version> CFNetwork/609.1.4 Darwin/12.2.0

For example:Social%20Sites/4.5 CFNetwork/609.1.4 Darwin/12.2.0

Android

Social Sites/[AppVersion#] (Android [AndroidVersion#]; [locale]; [Device])

For example, a Nexus 4 has this user-agent: Social Sites/4.1.2 (Android 4.2.2; en_US; LGE occam)

Windows Phone 8

NG-WinPhone8Client/<version>

Windows 8

NG-Win8Client/<version>

Desktop

Raindrops/<version>

Mobile Device Management/Mobile App Management Integrations

Overview

Sitrion is currently currently evaluating MDM/MAM support. Please contact Sitrion to discuss your specific situation.

Appendix A: Browser Support

Sitrion Social supported browsers are: Internet Explorer 7; Internet Explorer 8; Internet Explorer 9; Internet Explorer 10; Internet Explorer 11; Firefox 10 and later.

Exception: The Lookout view is not supported with Internet Explorer 7. Use of tile style is not supported with Internet Explorer 7. Note that Internet Explorer 8 running on older systems may be slow on the Lookout page.

NOTE: The Microsoft "Edge" browser which is installed by default on Windows 10 is not supported in SharePoint 2010. As of the 5.3.112 release (5.3 Patch 1) Sitrion Social should work with Edge for all web parts.

Appendix B: Language Support

Sitrion Social can be localized to the following languages. Contact your support rep if you are interested in a localized version of Sitrion Social.

- en-US   English (United States)
- pt-BR   Portuguese (Brazil)
- es-ES   Spanish (Spain, International Sort)
- fr-FR   French (France)
- de-DE   German (Germany)
- it-IT   Italian (Italy)
- pl-PL   Polish
- nb-NO   Norwegian, Bokmål (Norway)
- nl-NL   Dutch (Netherlands)
- tr-TR   Turkish (Turkey)
- ru-RU   Russian (Russia)
- zh-CN   Chinese (Simplified, PRC)
- zh-TW   Chinese (Traditional, Taiwan)
- ko-KR   Korean (Korea)
- ja-JP   Japanese (Japan)

We have included support for right-to-left language rendering in all the web parts (but not the Lookout page).

Appendix C: Using the Trusted Application Endpoint for the Lync Notifications Feature

NOTE: As of 2015, this feature is no longer supported.

Appendix D: How Sitrion Social 2013 Communities differ from Sitrion Social Communities

Note: Please see v5.4 release notes for new options on community navigation in SP2013 community sites.

Making "Social" and "Non-social" Sites

In SharePoint 2010 with Sitrion Social, only Community sites are "social" by default (having a stream and generating activity events). Other types of sites can be made social by activating newsfeed integration in them and adding web parts to them, or by converting them to a community.

SharePoint 2013 has three types of sites which by default can be considered as "social": Team Sites, Project Sites and "Community" sites. In their default, "out of box" deployment, these site types differ from one another in their social behaviors. When Sitrion Social is installed, all of these site types automatically attain a consistent set of behaviors (without need for an administrator to manually activate them):

- They have a stream view on front page
- Users can target microblogs and questions to the streams of any number of these sites from anywhere (e.g. I can ask a question from the My Site and send it to three of these sites)
- The creation of any item on any of the standard list or library types in these sites creates an activity stream event for me if I am following the community – regardless of whether I have added individuals in that community as colleagues (e.g. any new document, wiki, discussion, blog, announcement, task, calendar, bookmark, or picture – will create an event that I can see on my My Site)
- All of these sites have reporting and administration controls

Using SharePoint's site creation flow is the standard way to create a community. Depending on which type of socially-enabled site you want, change the template selection to either Team Site, Project Site, or Community Site on the Collaboration tab, or change it to any option on the NewsGator tab.

The Idea Campaign sites pictured here are included if you have the Idea Stream module.

Creating a Team Site

In the screenshot above, the template selection of "Team Site" allows creation of a team site. Creating a team site results in a site that looks something like this:
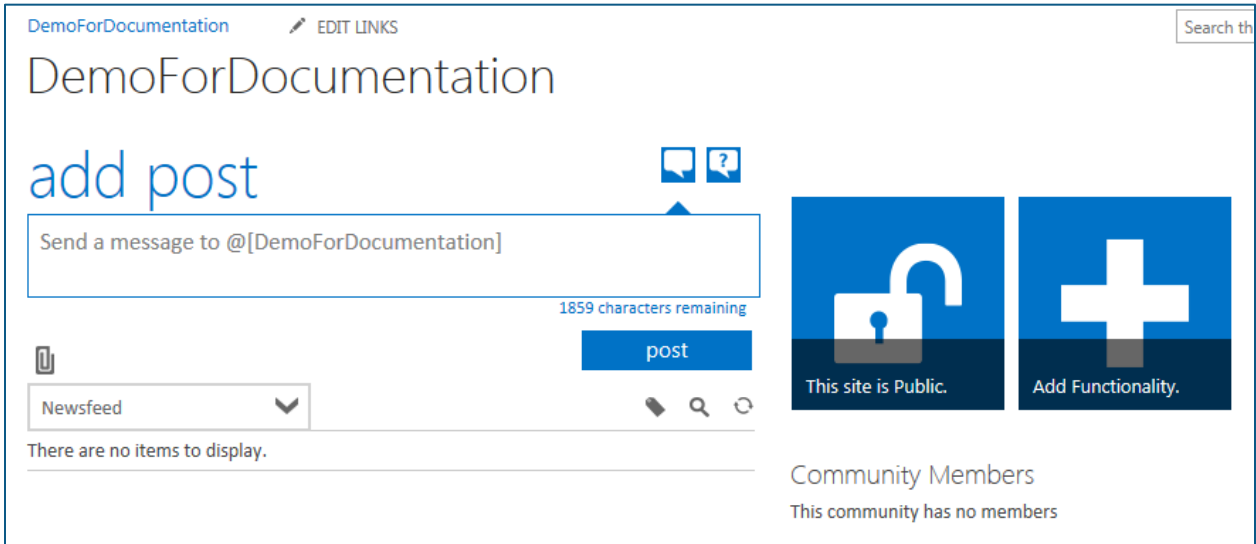
Creating a SharePoint Community Site

Creating a Sitrion Social community using the SharePoint out-of-box "community" template is a similar flow to creating a Team site, just with the Community Site template selected:

One important difference between creating a community site and creating a team site occurs if you choose to break inheritance and use specific permissions (when creating a private community for example).

In the case of a Community site, the Set Up Groups page appears to default to existing groups, but it is actually set to create new groups exclusive to the new site. *You will want to leave the default settings on this page unchanged* (see example below) because SharePoint is going to apply these security groups automatically. If you change groups on this screen, you can end up with missing permissions. You can go back and change groups later if you desire.

In this example, a private community using the SharePoint community site creates a site like this:
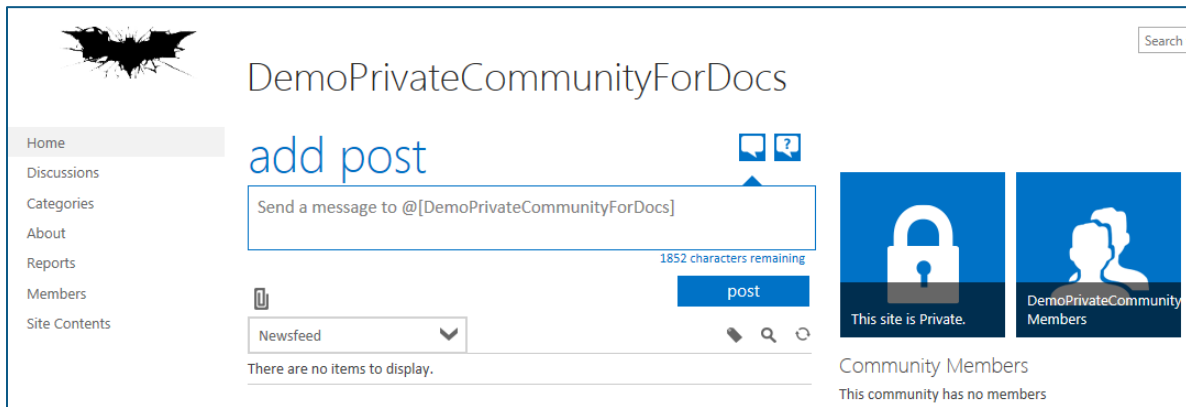
The "Discussions" link goes to the SharePoint 2013 community discussion. The "Categories" link is for managing discussion categories.

Creating a NewsGator Community Site

If you want to have some standard pre-defined types of communities (or you have been using the Sitrion Social community "template" feature in SharePoint 2010), you can choose to select this option from the NewsGator tab when creating a new site:
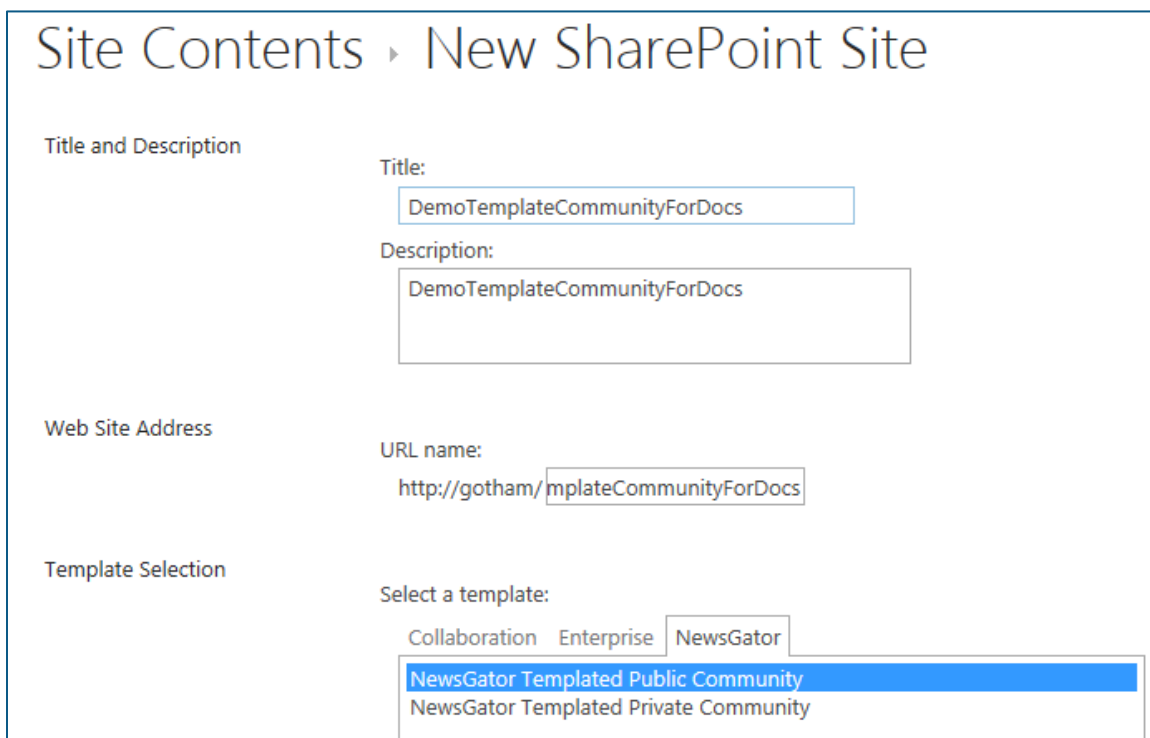
Templates must be defined in Central Admin for this option to work.

If you are familiar with how this capability worked in SharePoint 2010, you will find the flow to be very similar. The site creator is presented with one or more template choices (in the case pictured here, only one has been defined).

Community Setup

Select Community Template

Select a template on the right to apply to this community.

Click here to continue without a template.

Standard
Standard template for Social Sites communities

[Select]

Clicking "Select" takes the site creator to the Setup screen and clicking **OK** on this screen completes the process.

Community Name

This is the name of the community. This name must be be unique.

`DemoTemplateCommunityF`

Privacy Level

This is the recommended privacy level for this community.

`Public ▾`

NOTE FOR PRIVACY LEVELS:

☑ Enable public contribute rights

Private: Only Followers will see activities in their activity stream, and users will only be able to Follow from this site.

Public: Users will be able to follow this site regardless of their SharePoint permissions, and activity events will be public within the activity stream, through search and colleague newsfeed relationships.

Read Only

Activate this setting to prevent anyone that is not a community administrator from creating microblog posts in this community. With this mode enabled, site administrators may not be able to target this community in microblogs created outside of the current site.

☐ Allow only administrators to post to this Community

Disable Follower Controls

When this is selected, user actions to follow or unfollow the community are hidden and disabled, and the followers will be managed by the default members group and optionally an associated audience.

☐ Disable Follow and Unfollow Controls

Discovery

Let users find this community in community recommendations and community search results, regardless of privacy settings.

☑ Discoverable

Incoming Email

Activating this setting will create mailboxes for incoming email to be published to the activity feed for the community.

☐ Enable publishing incoming email to the activity stream.

Event Receivers

This allows you to choose which lists have our news feed integration event receivers enabled.

Enabled	Name	Type
☐	Site Pages	Wiki Page Library

[OK] [Cancel]

Creating a non-social site

In the first step of creating a new site (see below), you can see a "Blank Site" option in the Template Selection area. Sitrion Social adds this to make it easier for administrators to create a site which has no social features.

Accessing Administrative Options

In Sitrion Social, options for several community administrative actions appeared on the Admin tab of the community. In 2013, there is no Admin tab. Options for emailing all members of the community, editing community tags and interests, and administering Spotlight badges for the community now exist on the Site Settings page instead. It is accessible from the site's configuration menu in the upper right:
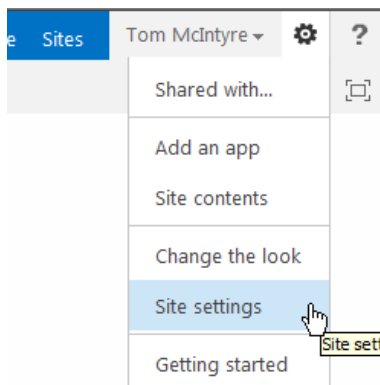
The administrative options appear for team sites, project sites, SharePoint community sites, and NewsGator community sites.

Configuring a community or social site

In each type of new community or "social" site, you can see that the Sitrion Social stream is enabled, and the security status is displayed to the right of this with the "padlock" tile:
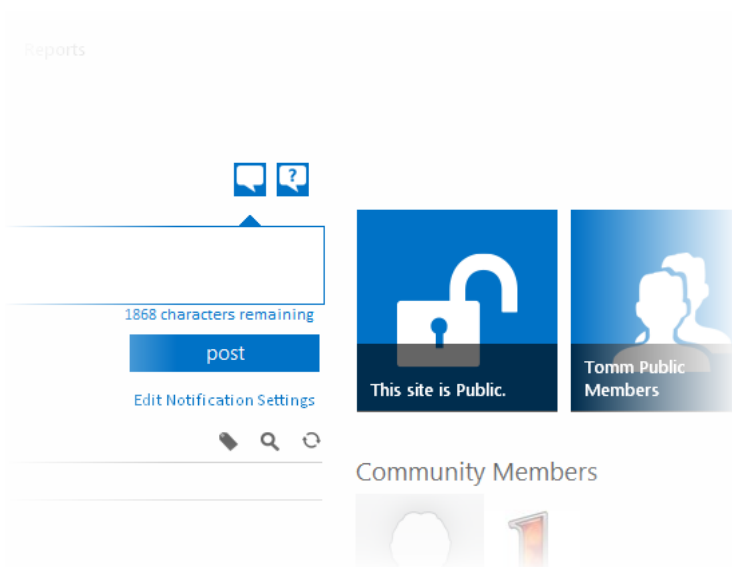
Accessing community configuration options is done differently in 2013. In 2010, you access the Admin tab of the community and then click "Go To Setup". In 2013, one way to do this is to open the Site Settings page and click the "NewsGator Community Configuration" link, as shown in the **Accessing Administrative Options** section above.

Alternatively, the site owner gets access to some of these settings (security-related ones) by clicking the "padlock" tile, which produces a pop-up dialog box:
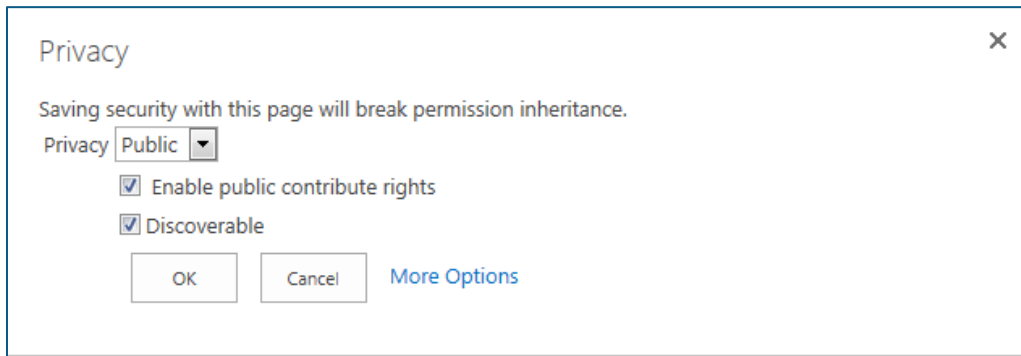
The full setup page is then accessible by clicking the "More Options" link:
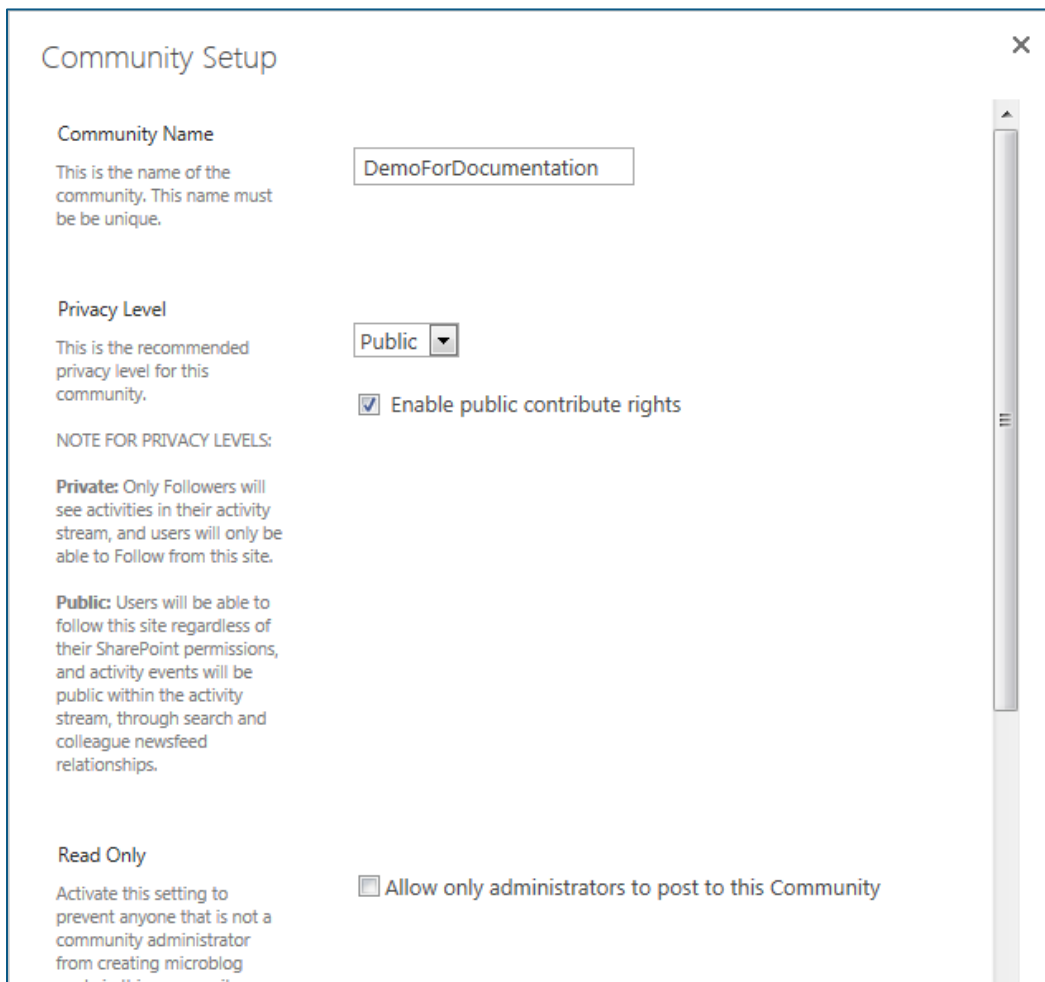
Navigation and Report access

By default, several navigation links are added to the Quick Nav on the left.
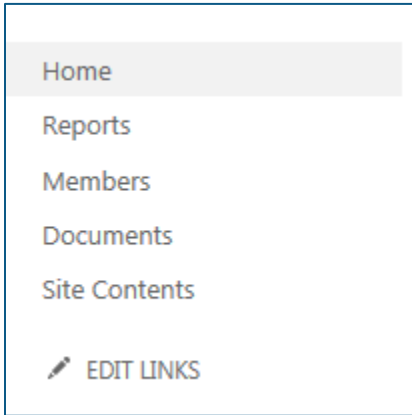
Reports gives access to the Sitrion Social activity reports. In 2010, these are only shown automatically to site owners, as they are deployed to the Admin tab by default. Site owners can change permissions or remove the link to restrict access. (Note that, in many cases, SharePoint gives users edit rights on the home page of the site. Site owners can also change permissions for this page to restrict changes.)

The **Members** link gives access to the Sitrion Social community members page.

Appendix D: Spotlight Module - Suggested uses for the included badge icons

Included with your Spotlight installation package should be a file called BadgeIcons.zip, which contains several icon ideas for getting started with badging. Below are some suggestions on how to use the enclosed badge icons.

years of service - three badge options, awarded for 2, 5 and 10+ years of service

trust - answer questions correctly, or earn trust for your content

popularity- how many people you're connected to, follow you, etc.

Plato – for having the most "accepted" answers to other people's questions

mvc - most valuable contributor

top selling sales person - of the month, quarter, year...

community manager - to recognize community managers

kudos - recognition for a job well done

engagement - based on your interactions in a community

Edison - for receiving many votes on your ideas

Dewey – (Dewey Decimal) for tagging and rating contributions in order make things easy to find later

autobiographer - profile 100% completed

Appendix E: Spotlight Module - Troubleshooting

Ideas for getting started with badging. Below are some suggestions on how to use the enclosed badge icons.

Symptom	Corrective Actions
Spotlight filters ("Kudos", "Earned Badges") do not appear in the Activity Stream web part.	Ensure the Spotlight Installer farm-level feature is activated.
Kudos and **Badging** activity types don't show in the **Activities I am following** section of your profile settings	Ensure the Spotlight Installer farm-level feature is activated.

Appendix F: Video Stream - SharePoint Configuration

Video Stream's configuration options in SharePoint can be accessed from:

1. Open Central Admin
2. Click "Manage Service Applications"
3. Click on the line beside "NewsGator VideoStream Service Application".
4. Click Manage on the Ribbon menu.
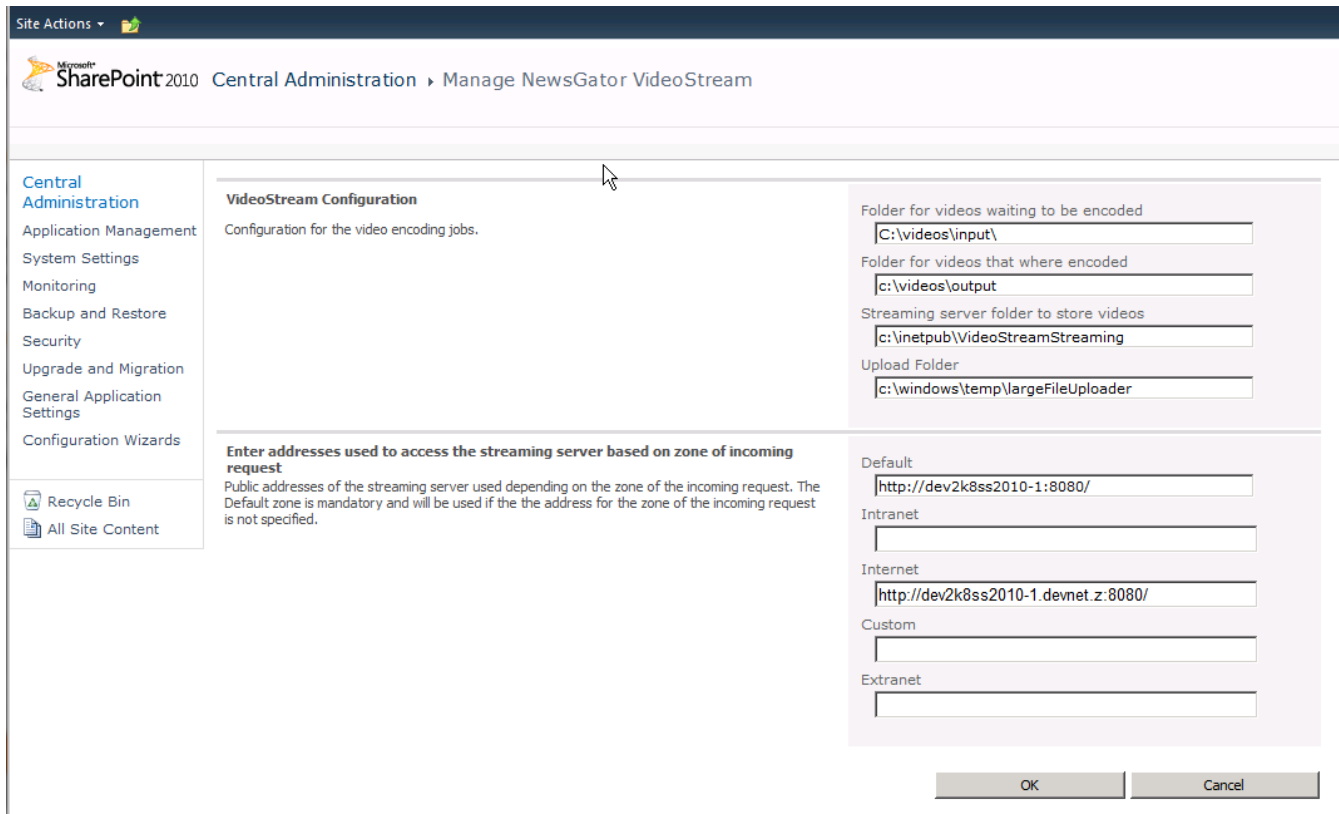
Appendix G: Video Stream - Database Tables

This section outlines the meaning of many of the tables and their columns. It is intended for informational purposes only and may change in any given release.

The Videos Table

This table has an entry for every video in the entire farm.

	Id	FileName	Status	LastError	SourceFileName
1	20	ad5f7518-2d13-433f-a0ca-8588edeb37d7.wmv	3		test_video_1.wmv
2	22	e56f35b6-b49c-4fbb-bf37-ff901d19a76a.wmv	3		test_video_2.wmv
3	24	17785bbb-f7c7-43f1-96e2-454e33f670ff.wmv	3		test_video_3.wmv
4	25	f4e2f533-ab0e-44c5-9e94-a3d37e343afd.wmv	3		test_video_3.wmv
5	26	3f2fee04-64fb-4532-b76b-eed4ba740e3a.wmv	3		test_video_4.wmv
6	27	7f7934a6-9a8a-4234-b836-abb93ae70391.wmv	3		test_video_5.wmv
7	28	98b3deec-f9b5-448e-a427-582e8273c0f6.wmv	3		test_video_6.wmv
8	29	67a85bd3-6e27-4fd8-bf58-a58f47f060dd.wmv	3		test_video_7.wmv
9	30	a408db46-cd4e-4cf8-a041-485cac090baf.wmv	3		test_video_8.wmv
10	31	52959a69-dff1-4a47-bda7-ff8503ee2bbe.wmv	3		test_video_9.wmv
11	32	f38ae622-0062-4d75-9fa6-d93bb11b4337.wmv	3		test_video_10.wmv
12	33	63eba40d-3fd1-4dbe-83e6-1baf5bb00757.wmv	3		test_video_11.wmv
13	34	3dc6309f-2f40-4430-975c-4ef7d46c371c.wmv	3		test_video_12.wmv
14	35	3c464d46-9850-44b4-a3ba-f583ecd563a4.docx	7	File type isn't supported. Stack Trace : at Microsoft.Expression.Encoder.MediaImp...	Tomoye Ecco 3 1 Release Notes.docx
15	36	4eda5459-229f-4117-b134-9d341df25c15.docx	7	File type isn't supported. Stack Trace : at Microsoft.Expression.Encoder.MediaImp...	My Cool Video.docx

Column	Purpose
FileName	The filename of the video in the Encoding input directory.
Status	The status of this video. The possible values are: • 0 – Video is waiting to be encoded • 1 – Video is being encoded • 3 – Video is available • 4 – Error during encoding (waiting to notify user) • 6 – Video marked for deletion • 7 – Error during encoding (user notified)
LastError	The text of the error encountered while encoding this video. If you have any questions about the error encountered, contact NewsGator Support team.
SourceFileName	The name of the file when it was uploaded by the end-user.

The VideoEncoding Table

The status of video currently being encoded can be found in the Video Stream database. The database is updated periodically throughout the encoding progress. The **VideoEncoding** table has this information:

	VideoId	EncodingType	Status	ProgressPercent	ProgressCurrentPass	ProgressTotalPass	ProgressCurrentPosition	TimeProcessStart	TimeProcessEnd	LastError	EncodingMachineName
1	20	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 13:46:07.503	2011-06-10 13:46:18.110	NULL	DEV2K8SS2010-1
2	22	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:01:07.200	2011-06-10 14:01:18.823	NULL	DEV2K8SS2010-1
3	24	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:07:07.090	2011-06-10 14:07:17.977	NULL	DEV2K8SS2010-1
4	25	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:11:07.023	2011-06-10 14:11:18.233	NULL	DEV2K8SS2010-1
5	26	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:14:06.963	2011-06-10 14:14:17.180	NULL	DEV2K8SS2010-1
6	27	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:16:06.890	2011-06-10 14:16:18.210	NULL	DEV2K8SS2010-1
7	28	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:19:06.840	2011-06-10 14:19:17.400	NULL	DEV2K8SS2010-1
8	29	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:22:06.797	2011-06-10 14:22:18.347	NULL	DEV2K8SS2010-1
9	30	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:27:06.680	2011-06-10 14:27:17.653	NULL	DEV2K8SS2010-1
10	31	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:31:06.663	2011-06-10 14:31:17.983	NULL	DEV2K8SS2010-1
11	32	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:35:06.570	2011-06-10 14:35:17.530	NULL	DEV2K8SS2010-1
12	33	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:39:06.450	2011-06-10 14:39:17.343	NULL	DEV2K8SS2010-1
13	34	smoothstream	3	100	2	2	00:00:10.8000000	2011-06-10 14:43:06.423	2011-06-10 14:43:16.790	NULL	DEV2K8SS2010-1
14	35	smoothstream	1	0	0	0	00:00:00.000	2011-06-13 14:20:08.557	NULL	NULL	DEV2K8SS2010-1
15	36	smoothstream	1	0	0	0	00:00:00.000	2011-06-13 14:27:08.077	NULL	NULL	DEV2K8SS2010-1

Column	Purpose
VideoId	The id of the particular video in the Videos table.
EncodingType	For future use.
Status	The status of this video. The possible values are: • 0 – Video is waiting to be encoded • 1 – Video is being encoded • 3 – Encoding is done. Waiting to notify SharePoint • 4 – Error during encoding (waiting to notify user) • 5 – Encoding cancelled • 6 – The file has been copied to the streaming server
ProgressPercent	The encoders progress on the current pass
ProgressCurrentPass	The current pass of the encoder
ProgressTotalPass	The encoder may require more than one pass to encode a video. This is the total number of passes to be made.
TimeProcessStart	The local time the encoder started to encode the video
TimeProcessEnd	The local time the encoder finished encoding the video
LastError	Any error which was encountered during the encoding process.
EncodingMachineName	The name of the machine encoding the video.

Appendix H: Video Stream - Encoding Service

Encoding Service Logs

The encoding service resides outside of SharePoint. For this reason it logs any errors to the Event Viewer in the VideoStream application log.

Turning on Verbose Logging

By default the Encoding Service only logs Warnings and Errors. To turn on verbose logging, do the following:

1. Use Windows Explorer to navigate to the directory which holds the Encoding Service on the Encoding Server. The default location is **C:\Program Files (x86)\ NewsGator\Video Stream Encoding Service**.
2. Open the file **logging.config** in Notepad.
3. Find the node:

```xml
<?xml version="1.0" encoding="utf-8" ?>
<log4net>
  <appender name="FileAppender" type="log4net.Appende">...</appender>
  <appender name="EventLogAppende" type="log4net.Appende" Threshold="Warning">...</appender>
  <appender name="SimpleFileAppen" type="log4net.Appende">...</appender>
  <appender name="SimpleRollingFi" type="log4net.Appende">...</appender>
  <appender name="ColoredConsoleA" type="log4net.Appende" Threshold="INFO">...</appender>
  <root>
    <level value="INFO" />
    <!--<appender-ref ref="SimpleFileAppender" />-->
    <!--<appender-ref ref="FileAppender" />-->
    <!--<appender-ref ref="SimpleRollingFileAppender" />-->
    <appender-ref ref="EventLogAppender" />
    <appender-ref ref="ColoredConsoleAppender" />
  </root>
</log4net>
```

4. Change the value attribute from **"WARN"** to **"INFO"**. All the options are:
   a. ERROR : shows only errors
   b. WARN : shows warning and errors
   c. INFO : shows informational messages, warning and errors
   d. DEBUG : shows ALL messages including a series of debug messages (this is the most verbose option)
5. Restart the **NewsGator Video Encoding Service** using the Service snapin.

Appendix I: Video Stream - Streaming Server

Streaming Server Logs

The Streaming Server resides outside of SharePoint. For this reason it logs any errors to the Event Viewer in the VideoStream application log.

Turning on Verbose Logging

By default the Streaming Server only logs Warnings and Errors. To turn on verbose logging, do the following:

1. Use Windows Explorer to navigate to the directory which holds the dl's for the Streaming Server website on the Streaming Server. The default location is **C:\inetpub\videos\bin**.
2. Open the file **logging.config** in Notepad.
3. Find the node:

```xml
<?xml version="1.0" encoding="utf-8" ?>
<log4net>
  <appender name="FileAppender" type="log4net.Appende">...</appender>
  <appender name="EventLogAppende" type="log4net.Appende" Threshold="Warning">...</appender>
  <appender name="SimpleFileAppen" type="log4net.Appende">...</appender>
  <appender name="SimpleRollingFi" type="log4net.Appende">...</appender>
  <appender name="ColoredConsoleA" type="log4net.Appende" Threshold="INFO">...</appender>
  <root>
    <level value="INFO" />
    <!--<appender-ref ref="SimpleFileAppender" />-->
    <!--<appender-ref ref="FileAppender" />-->
    <!--<appender-ref ref="SimpleRollingFileAppender" />-->
    <appender-ref ref="EventLogAppender" />
    <appender-ref ref="ColoredConsoleAppender" />
  </root>
</log4net>
```

4. Change the value attribute from "**WARN**" to "**INFO**". All the options are:
   a. ERROR : shows only errors
   b. WARN : shows warning and errors
   c. INFO : shows informational messages, warning and errors
   d. ALL : shows ALL messages including a series of debug messages (this is the most verbose option)

Streaming Server Database Connection

To see what connection string the streaming server will use:

1. Use Windows Explorer to navigate to the directory which holds the dl's for the Streaming Server website on the Streaming Server. The default location is **C:\inetpub\videos**
2. Open the **web.config** file
3. Find the node :

```xml
  <connectionStrings>
    <add name="NewsGator.VideoStream.IsmHttpModule.Properties.Settings.DBConnectionString"
      connectionString="Data Source=(local);Initial Catalog=NewsGator_Videos;Integrated Security=True" />
  </connectionStrings>
```

4. Ensure it is pointing to the right database.

If the connection string is set to use integrated security, as in the example above, you will also need to ensure the app pool account has read/write access to the database:

1. Open the Server Manager and navigate to the Streaming Server's App pool.
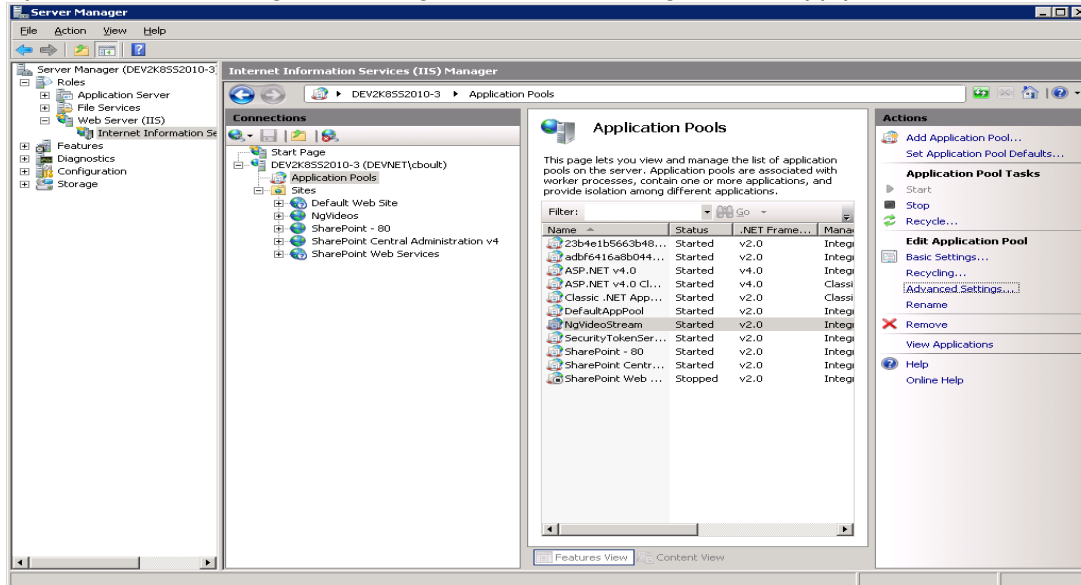
2. Select "Advanced Settings" and ensure the identity of the app pool has access to the database
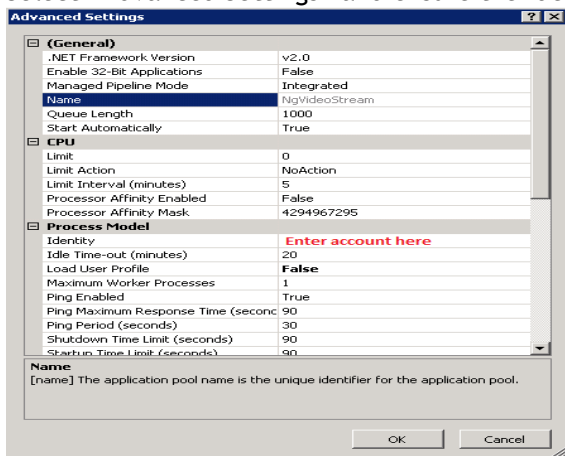
Appendix J: Video Stream - Video Player

Turning on Debug Mode
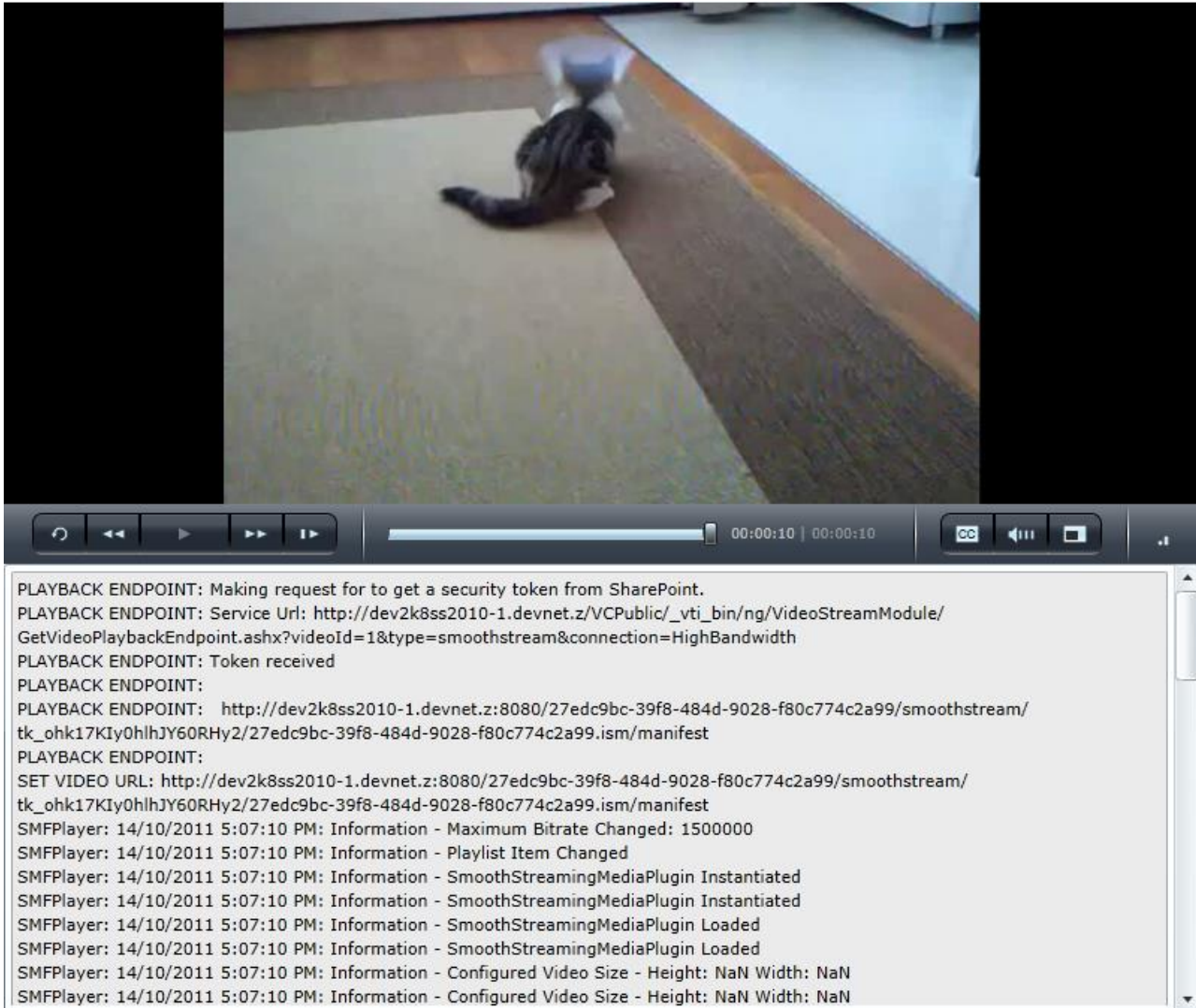
The Video Player web part has a debug mode which can help diagnose video playback issues. The video player debug mode is only accessible from the full video page. It is not accessible from the Activity Stream directly.

Enabling Debug Mode by:

1. Visit the full video page for any video
2. Click Site Actions -> Edit Page
3. Choose Edit Web Part on the edit menu for the Video Player webpart.
4. Check the "Enable Debug Messages" option
5. Click OK.
6. Click Stop Editing
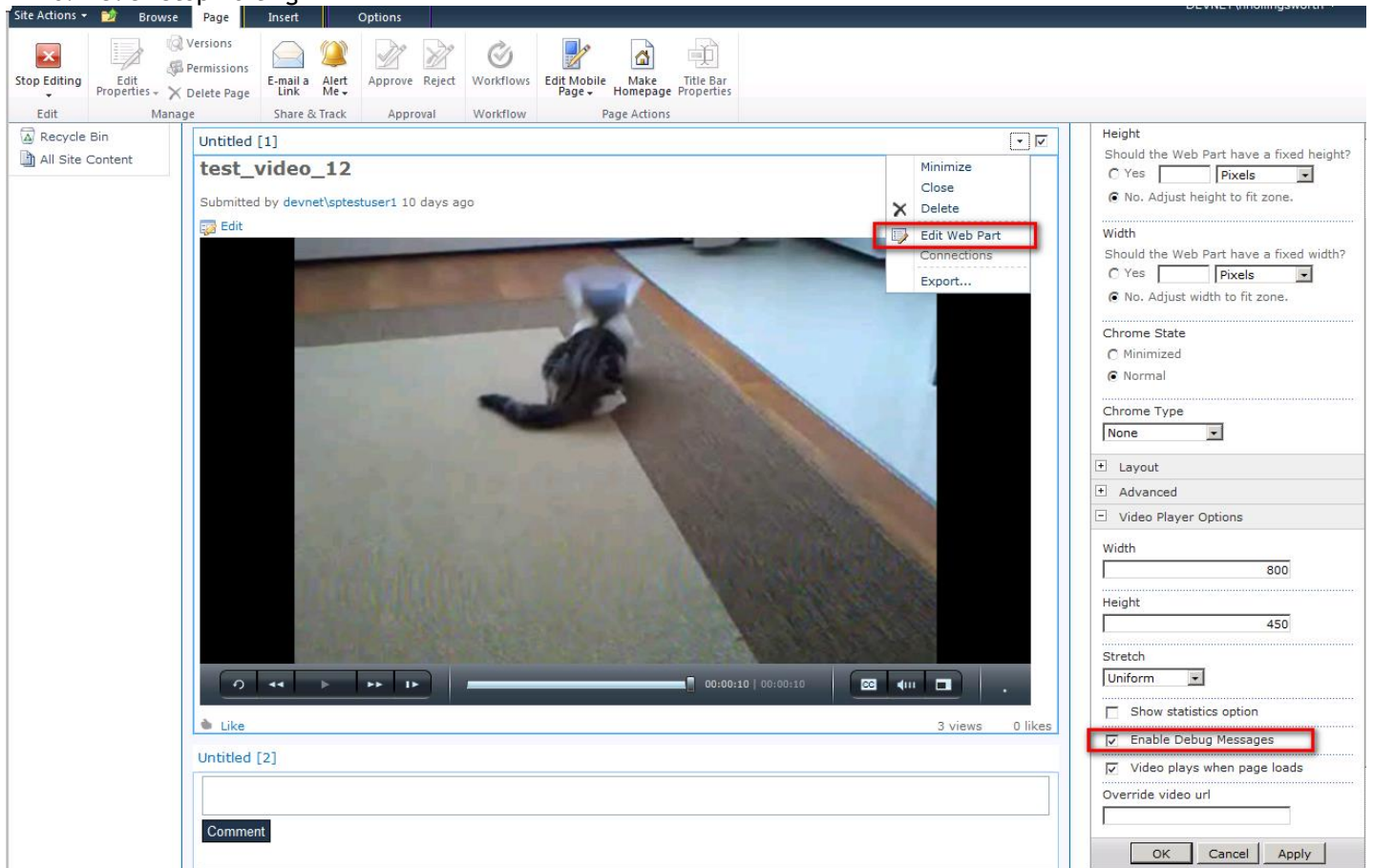
You will now see a debug Window under the Video Player.


```
PLAYBACK ENDPOINT: Making request for to get a security token from SharePoint.
PLAYBACK ENDPOINT: Service Url: http://dev2k8ss2010-1.devnet.z/VCPublic/_vti_bin/ng/VideoStreamModule/
GetVideoPlaybackEndpoint.ashx?videoId=1&type=smoothstream&connection=HighBandwidth
PLAYBACK ENDPOINT: Token received
PLAYBACK ENDPOINT:
PLAYBACK ENDPOINT:  http://dev2k8ss2010-1.devnet.z:8080/27edc9bc-39f8-484d-9028-f80c774c2a99/smoothstream/
tk_ohk17KIy0hlhJY60RHy2/27edc9bc-39f8-484d-9028-f80c774c2a99.ism/manifest
PLAYBACK ENDPOINT:
SET VIDEO URL: http://dev2k8ss2010-1.devnet.z:8080/27edc9bc-39f8-484d-9028-f80c774c2a99/smoothstream/
tk_ohk17KIy0hlhJY60RHy2/27edc9bc-39f8-484d-9028-f80c774c2a99.ism/manifest
SMFPlayer: 14/10/2011 5:07:10 PM: Information - Maximum Bitrate Changed: 1500000
SMFPlayer: 14/10/2011 5:07:10 PM: Information - Playlist Item Changed
SMFPlayer: 14/10/2011 5:07:10 PM: Information - SmoothStreamingMediaPlugin Instantiated
SMFPlayer: 14/10/2011 5:07:10 PM: Information - SmoothStreamingMediaPlugin Instantiated
SMFPlayer: 14/10/2011 5:07:10 PM: Information - SmoothStreamingMediaPlugin Loaded
SMFPlayer: 14/10/2011 5:07:10 PM: Information - SmoothStreamingMediaPlugin Loaded
SMFPlayer: 14/10/2011 5:07:10 PM: Information - Configured Video Size - Height: NaN Width: NaN
SMFPlayer: 14/10/2011 5:07:10 PM: Information - Configured Video Size - Height: NaN Width: NaN
```

Appendix K: Video Stream - Activity Stream Messages

There are several types of messages sent to a user's activity stream:

1. When a user uploads a video and it queued for encoding, they will see the following message in their activity stream
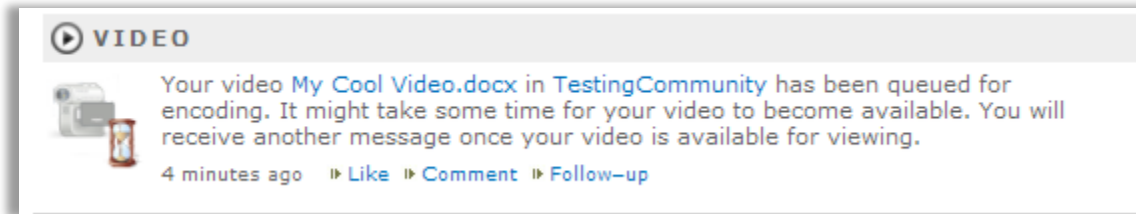
2. When a user's video has been encoded and it now available in the video center and/or community they will see this message in their activity feed
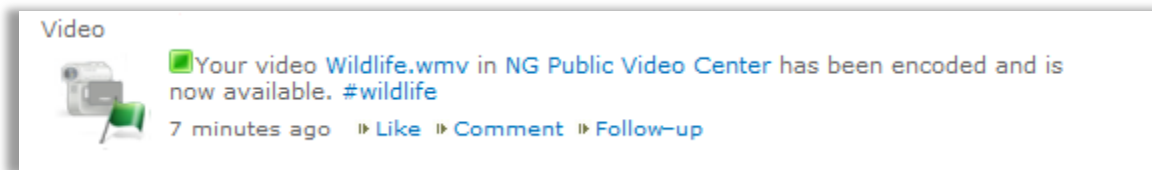
3. When an error occurs during the encoding process, the user will see this message in their activity feed
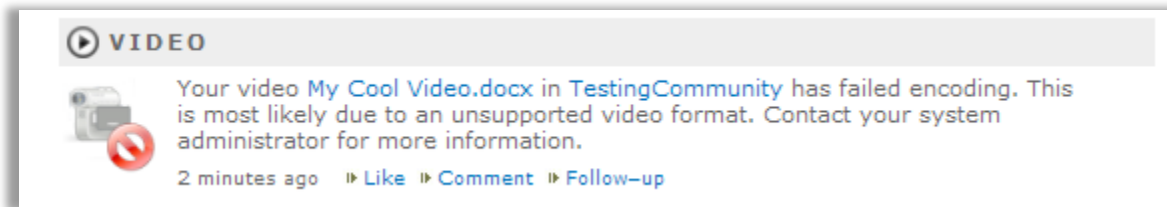
4. When a community is moderated a user will see this message in their activity feed when their video is awaiting approval.
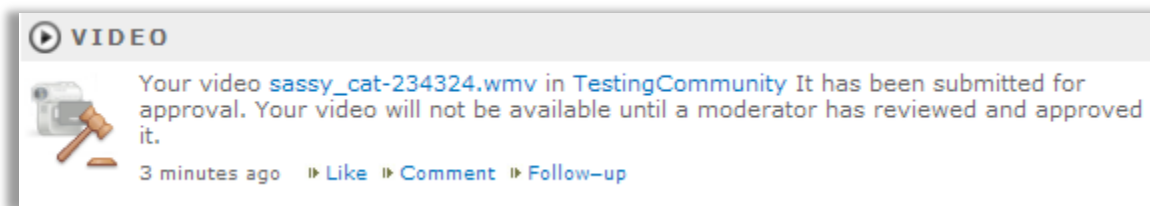
Appendix L: Video Stream - Encoding Console

The video encoding console provides an easy way to see the encoding queue and check the status of videos being encoded. The link to the console is available on the NewsGator VideoStream service application management page.

An example of what the console looks like:

If you click on the "view details" link, a window with a detailed error message will appear:

If the error has been addressed, clicking "Restart Encoding" will reschedule the video for encoding and it will be handled by the encoding service the next time it runs.

Appendix M: Video Stream - Troubleshooting Checklist

Video Encoding Fails

1. Check Video Stream section in Event Log on the machine where Encoding Service is installed.
2. Check errors in the Encoding Console.
3. Make sure the account used to run the Encoding Service has access to the database.
4. If an SQL Server alias is used make sure it is created for 32-bit client.
5. Make sure Expression Encoder is installed.
6. Make sure Desktop Experience Feature is installed.

Video Playback Fails

1. Check the Verifty button on the service application properties page.
2. Check the Event Log on the machine where Video Streaming server is installed.
3. Make sure the application pool account has access to the database.
4. Make sure the **NewsGator VideoStream to Activity Feed Integration feature** is enabled for the site you are trying to watch the video from.
5. Ensure the streaming server address of the Video Stream SharePoint Configuration is pointing to the correct address.
6. Try to open the Video Stream server test page.
7. Make sure the file is encoded and is located under Video Stream server website (videos and the website bin folder should be together).

8. Make sure the application pool account has permissions to the site folder. In security restricted environments make sure it's in the IIS_IUSRS group.

9. Make sure ASP.NET is installed.

10. Make sure SQL Server and Video Stream server timezones are the same.

11. Make sure IIS Media Extensions are installed.

12. Make sure the anonymous account has access to the Video Stream folder.

13. Use FireFox Firebug or IE 9 to see the actual http error.

14. To exclude a firewall problem make sure the requests to the *.ism/manifest file are in the IIS logs.

Appendix N: Video Stream - Getting more information from IIS

Openning a URL to IIS from a remote web browser will only contain minimal information. Here is an example of a remote error response from IIS:
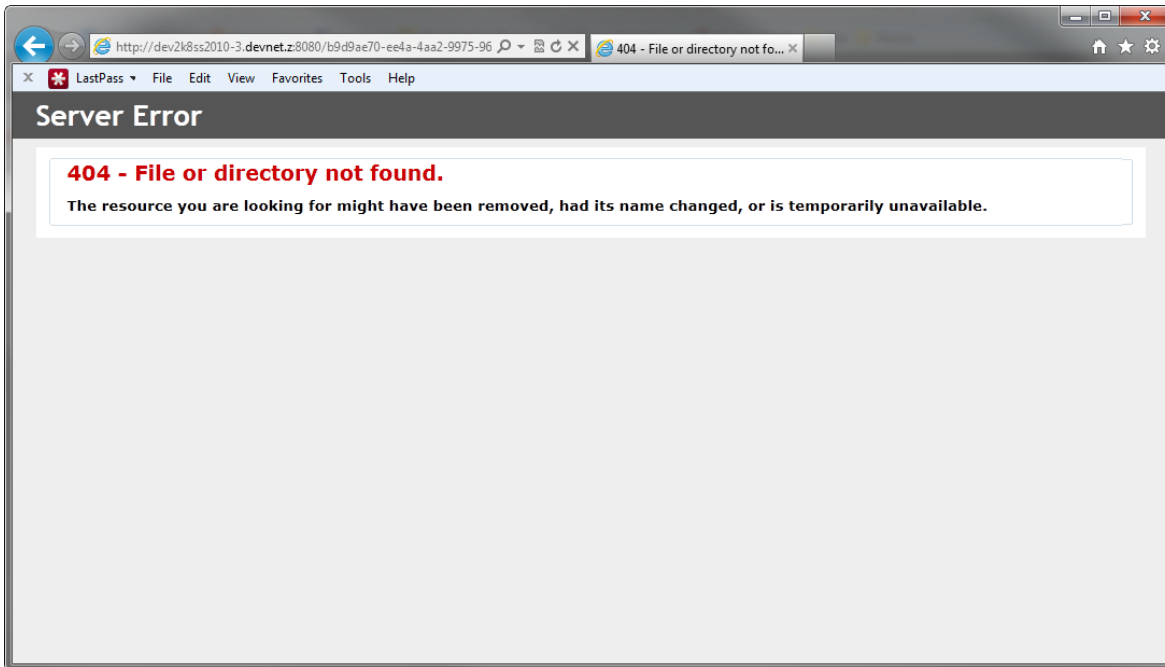
Using this page alone, it's hard to figure out why the server is returning this response.

You will get more information if you open the same URL in a web browser running directly on the IIS server you are accessing. Here is an example of the page you get when you make the same request made in the above image, but instead make the request on the web server itself:

Notice how this response now contains a lot more information. From this screen, you can now see exactly why the server is returning a 404 response. The "Most likely causes" section will tell you exactly why the request is most likely returning this response.

Appendix O - Sitrion Social Video Stream Kontiki Integration

Overview

Many organizations who want to use Video Stream to truly make video "social" have already made substantial investments in video streaming infrastructure.   One of the popular enterprise-class video storage and streaming technologies that NewsGator customers are using is Kontiki.   Kontiki's peer-based file sharing mechanism is ideal for geographically disparate environments as it minimizes load on the WAN by streaming from a copy local to a region or office.

This guide describes how to enable Kontiki. Kontiki handles the encoding, storage and streaming mechanism for Video Stream. For the end-user, the Video Stream experience will be the same as using the Video Stream native option. For the administrator, the Kontiki integration capability deploys as a SharePoint feature.

Compatibility

This integration supports Kontiki 8.2.

Configuring Video Stream to support Kontiki

This section outlines the steps to enable and disable the Kontiki Integration feature.

Prerequisites

The Kontiki Integration feature requires Sitrion Social 5.1 and Sitrion Social Video Stream 5.1 (or later). These should be installed and configured before deploying the Kontiki Integration feature.   Since Kontiki handles the streaming, configuration steps or entries related to the streaming server in the Sitrion Social installer or the Video Stream Additional Components installer can be ignored.   IIS and the Smooth Streaming Extensions for IIS will not be required.

The Kontiki Integration feature requires the Kontiki client to be installed on any machine that will view videos. If the Kontiki client is not installed on the user's machines they will not be able view videos.

IMPORTANT:

Make sure you have a Kontiki user account with connector access allowing you to use the Kontiki publishing web service endpoint.

Step 1 – Configure SharePoint to trust the digicert root certificate used by the Kontiki REST API endpoint

Integration with Kontiki is done through a REST API endpoint protected by SSL. The root certificate used by Kontiki must be trusted by your SharePoint installation. The root certificate that should be trusted by your SharePoint installation is the "DigiCert High Assurance EV Root CA". You can get the certificate from https://www.digicert.com/digicert-root-certificates.htm. Once you have a copy of the certificate on the machine you can proceed with telling SharePoint to trust this certificate.

1. Go to "Central Administration / Security / Manage Trust"
2. Click on "New"
3. Click on the Browse option of the "Root Authority Certificate" field
4. Select the file that contains the copy of the certificate

Step 2 - Installing the Kontiki solution file

The Kontiki integration is contained in the "NewsGator.VideoStream.KontikiIntegration.wsp" file. The Kontiki solution is not loaded by any of the NewsGator installers so this will need to be done manually. You can use STSADM or PowerShell to load this solution file into your SharePoint installation. Here is an example of the STSADM and PowerShell commands that will load the solution file into SharePoint:

```
STSADM :
STSADM –o addsolution –filename .\NewsGator.VideoStream.KontikiIntegration.wsp

PowerShell:
Add-SPSolution .\NewsGator.VideoStream.KontikiIntegration.wsp
```

Once the solution has been loaded into your environment you can proceed to "Central Administration / System Settings / Manage farm features" and deploy it.

Step 3 - Activating the Kontiki Farm feature
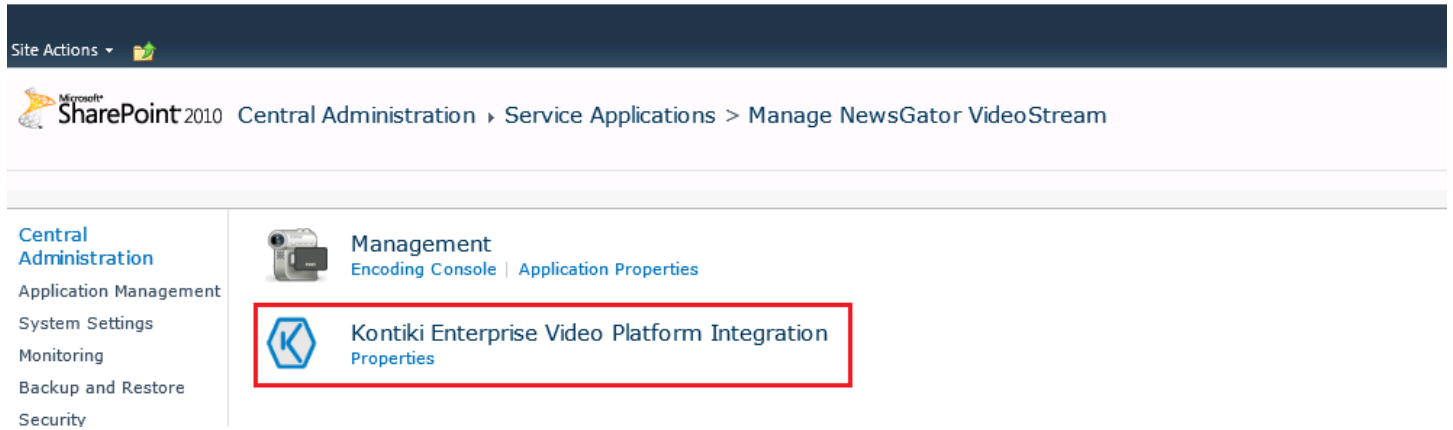
Once deployed, a new Farm level feature will be available. This feature is called "**NewsGator VideoStream Integration With Kontiki (Farm)**". Activating this feature will register Kontiki as a possible provider for video encoding and streaming.

IMPORTANT:
After enabling the feature you should **restart IIS** and the **SharePoint Timer service** on all the servers in the farm.

Step 4 - Configuring Kontiki integration

Once the solution file is deployed and the farm level feature is activated a new Kontiki option will appear on the manage page for the VideoStream module. This option will take you to a Kontiki properties page where you can configure the connection with the Kontiki Publishing web service.

Fields on the properties page:
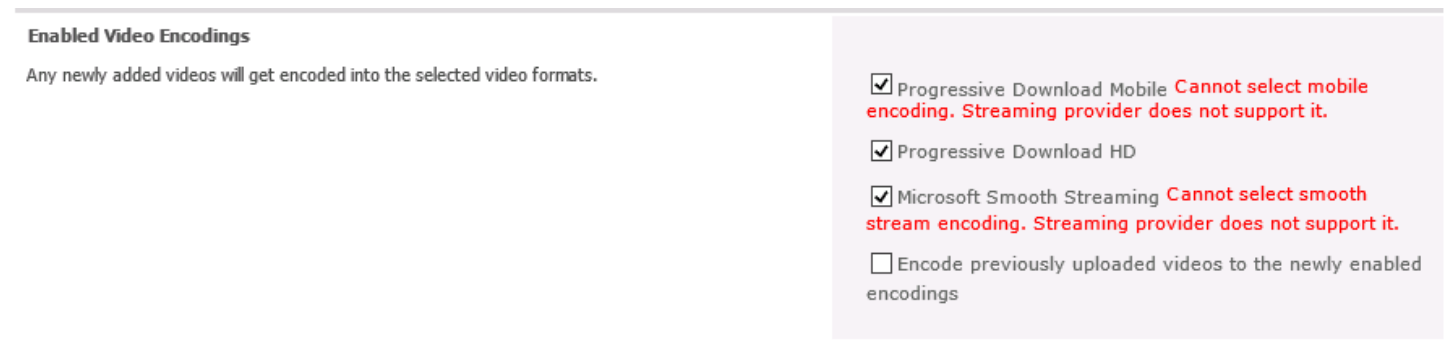
1. **Kontiki REST API url**: The url used to access Kontiki's REST endpoint. It will most likely be https://api.kontiki.com/api/v1.
2. **Kontiki REST API access token type**: Kontiki's API can be accessed using either a service token, which Kontiki should supply you with, or a public token. See Kontiki's REST API documentation for an explanation of service and public tokens.
3. **Public token configuration**: If you selected Public Token, you will need to fill in this section.
    a. **Company Prefix (mandatory)**: The company prefix Kontiki provided you with.
    b. **Email (mandatory)**: Any company email address.
4. **Service token configuration**: If you selected Service Token, you will need to fill in the values in this section.
    a. **Service Token (mandatory):** The service token Kontiki provided you with. This token gives you rights to do any action using the REST API endpoint.
    b. **Act as user (optional):** When using a service token you can optionally elect to impersonate any user. You can use this option if you want to perform video upload and transcoding on Kontiki using a particular user. It is not mandatory.
5. **Kontiki Client Port Number**: The port number the Kontiki clients are configured to listen on in your environment.

Step 5 – Enabling Kontiki as an encoding and streaming provider

Once you have configured access to the Kontiki REST API endpoint you will need to tell VideoStream to use Kontiki to encode and stream videos. To do this you go to the VideoStream configuration page and change both fields in the "Video Stream Service Providers" section to be "Kontiki Encoder" and "Kontiki Streaming".

Note: Once changed you will only be able to encode to Progressive download. If you attempt to enable other encoding formats (supported by Video Stream native encoding) the configuration page will not allow you. See below:

Switching back to Video Stream native mode from Kontiki Integration mode

To switch back to Video Stream native mode, select "NewsGator Video Stream Encoder" and "NewsGator Video Stream Streaming" in the configuration page. Then you can deactivate the **"NewsGator VideoStream Integration With Kontiki (Farm)"** in Central Administration/Manage Farm Features. After that, install the streaming server. Consult the Sitrion Social v5.5 Planning and Installation Guide for details.

Appendix P - Sitrion Social Video Stream BrightCove Integration

Integration with the BrightCove Video Cloud is configured in the Video Stream "Bright Cove integration configuration" page. From that page you can enter your read/write keys that allow you to access your BrightCove Video Cloud through BrightCove's REST API.

Once you configure your read key, video links to your BrightCove videos will be able to play inline in the activity stream. If you configure your write key, then a video upload icon will show up in the activity stream allowing you to upload a video to BrightCove.

Behaviors you can configure on that page:

1. Read token: The read token associated with your account that gives you read access to your videos through the BrightCove REST API.
2. Write token: The write token associated with your account that gives you the possibility to upload new videos to your BrightCove Video Cloud.
3. Default player id: Allows you to configure which player is used by default to playback BrightCove videos. This can be changed by the user uploading a video if the "Show Video Player ID field" option is enabled.
4. Url template: Allows you to define what the link to BrightCove videos that are to be played from the stream should look like. You have access to the following 2 replacement values from within the template:
   a. {playerId} : The ID of the video player that will be used.
   b. {videoId} : The ID of the video that will be played.
5. Time a video is allowed to get uploaded: This is the time in minutes the system will allow for a video to get uploaded. If it takes longer that this time the upload is canceled.
6. Text to be associated with activity stream entry: This the template of the text that will be created as an activity stream entry once a video is uploaded to BrightCove Video Cloud. You have access to the following replacement values:
   a. {postText} : Text the user adding the video can enter.
   b. {videoTitle} : The title given to the video.
   c. {videoUrl} : The url to get to the video. Note: for the activity stream to pick up the video and put an inline player for it the url to the video must be present.
7. Which non mandatory fields are made available on the video upload page.
   a. Shows Activity Stream text field: The complete activity stream text that will be posted in the stream. As the admin you control what is posted, you also have a text field that allows you to enter what should be posted, but if you show this field the user can completely change it.
   b. Show Post Text field: Allows the user to input some text that will be put in the activity stream text where the admin has specified the {postText} replacement value.
   c. Show Video Description field: The video description is not mandatory, you can choose to allow users to enter a description or not.
   d. Show Player ID field: Allows the user to specify the ID of the player to use to play the video that is being uploaded. If none is specified then the "Default Player ID" is used.
   e. Show Video Tags field: Allows the user to specify tags to add to the video. The tags are added both to BrightCove and Sitrion Social.
   f. Show video expiration field: Allows the user to specify a video expiration date.
8. Custom metadata fields. You can specify metadata fields you added to BrightCove and values you want set to them. Make sure the fields you configure here where previously created in BrightCove or you will not be able to upload your video. The values you can set are either a text value you enter directly or a replacement value in the form of {…} that will be converted run time. The set of replacement values are:
   a. {User.Name} : Full name of the user adding the video
   b. {User.LoginName} : Sitrion Social login name of the user adding the video

c. {User.Email} : Email of the user adding the video
d. {Web.ServerRelativeUrl} : Server relative url of the SharePoint web where the video was added from
e. {Web.Title} : Title of the SharePoint web where the video was added from
f. {Web.Name} : Name of the SharePoint web where the video was added from
g. {Web.Url} : Full url of the SharePoiint web where the video was added from
h. {Web.ID} : Id of the SharePoint web where the video was added from
i. {Web.Site.ID}: id of the SharePoint site where the video was added from

BrightCove Integration

If you are using BrightCove and wish to integrate with the activity stream. If you provide the Read Token you will be able to play videos inline. If you provide the Write Token you will be able to upload videos to BrightCove from the stream.

Read Token

Write Token

Default player id to use when generating links to a video uploaded to BrightCove

Url template to use when linking to a video uploaded to BrightCove

http://link.brightcove.com/services/player/bcpid{pla

Tags that will automatically be added to videos uploaded to Brightcove cloud.

Time, in minutes, a video is allowed to take to get uploaded to Brightcove cloud.

10

Text that will be associated with activity stream entries created when a new video is added.

{postText}
Video {videoTitle} at {videoUrl} was added. #brightcove

☐ Show Activity Stream Text field

☐ Show Post Text field

☐ Show Video Description field

☐ Show Video Player ID field

☐ Show Video Tags field

☐ Show video expiration field

Brightcove custom metadata fields

Allows you to specify values you want the video that will be uploaded to Brightcove to have in the specific custom fields defined on your installation of Brightcove. You can specify regular strings as value or the following and they will be replaced accordingly at run time. The follwing tokens are available : {User.Name}, {User.LoginName}, {User.Email}, {Web.ServerRelativeUrl}, {Web.Title}, {Web.Name}, {Web.Url}, {Web.ID}, {Web.Site.ID}.

Field name	Value to set

OK   Cancel

Appendix Q - High level design for Push Notifications with Sitrion Social Sites

Sitrion Social Sites implements Push Notifications as part of the regular notification processing job. It simply just adds a step to the end of that process. If the user has selected to receive Push Notifications any their devices running Sitrion Social mobile application, it will be processed at this time.

Sitrion Social Sites utilizes a Cloud Service running in the Microsoft Azure Cloud to handle the platform specific distribution of the notifications. By doing so we centralize the configuration needed to communicate with all of the device vendors directly. Both Apple and Google require certificates and/or keys to properly communicate. By keeping this centrally deployed in the Cloud, Sitrion can manage that for all of its customers.
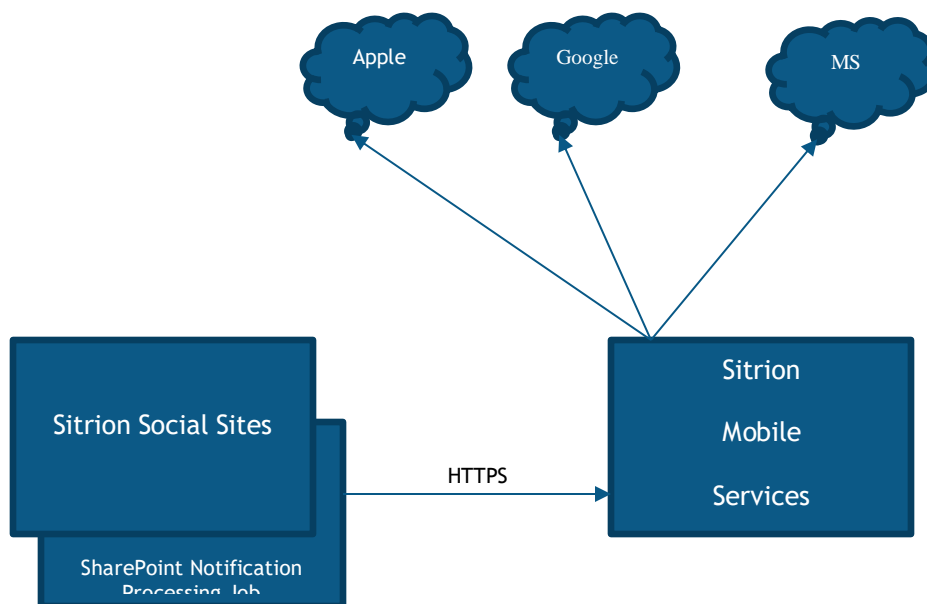
Processing steps:

- Sitrion Social Sites processes notifications in a custom Sitrion SharePoint job. The same process that generates notifications in the web UI and email notifications also generates the push notification.

- Users in the mobile application will enable or disable push notifications. The enable action generates a call to the phone's platform notification provider, Apple, Google or Microsoft, to register the device for push notifications. This is not a Sitrion service and is specific to the phone's platform. Once the device is registered, it will forward the Device Token (provided by the call to the device specific platform vender) to Social Sites. We will store that in our database for the user.

- When the user gets a notification, we look to see if they have any devices registered to get a push notification. If they do, a request with the ID of the event, the Title, a Summary, and the user's ID are POSTED to the Sitrion Mobile Services service in Azure.

- Based on the input, the Azure service will collect all the information that is needed to communicate with the phone's platform provider (certificates, keys, etc.) and POST a message to that service (Apple, Google, or Microsoft) to send the push notification.

- If at any point the user selects to no longer get notifications. The application on the phone will send a message to Social Sites and the Device Token will be deleted from our tables and push notifications will end for that device/user.

It's important to know that the Azure service stores very little information. In fact, the only time anything is stored is in the event of a failure. We can get errors from the providers for various reasons. We will log that information so we can troubleshoot. Both Google and Apple will also report back to us any Device Token that is no longer valid, for whatever reason. We will keep that invalid Device Token in our tables in Azure as we are required by the providers to stop sending requests to devices that have an invalid token.

For specific end point information and data that is transferred when calling the service, see the online service documentation here. https://sitrionservicesnotification.azurewebsites.net/Help/Api/POST-api-Push

Appendix P - Sitrion Social Video Stream Kaltura Integration

Integration with the Kaltura Video paltform is configured in the Video Stream "Kaltura integration configuration" page. From that page you can enter your read/write keys that allow you to access your Kaltura videos through Kaltura's REST API.

Once you configure your access key, video links to your Kaltura videos will be able to play inline in the activity stream. A video upload icon will show up in the activity stream allowing you to upload a video to the Kaltura platform.

Behaviors you can configure on that page:

Kaltura connection parameters

2) **Url to the Kaltura platform API**
   a) Should typically be : http://www.kaltura.com
   b) **Note** : To use the Kaltura API, you will need a Publisher Account with API access
3) **Your partner ID that identifies you to the Kaltura platform**
   a) To find your Kaltura partner id :
   b) Open the KMC and go to "Settings > Accounts Settings"
   c) Under Account Info, copy the Partner ID value
4) **The ADMIN secret to use an ADMIN connection to the Kaltura platform.**
   a) You can get that key from :
      i) Open the KMC and go to "Settings > Integration Settings"
   b) The "Administrator Secret" field is the value.
   c) **Note** : The key is never sent to the client. It is only used server side while communicating with Kaltura.
5) **The USER secret to use a USER connection to the Kaltura platform**
   a) You can get that key from
      i) Open the KMC and go to "Settings > Integration Settings"
      ii) The "User Secret" field is the value.
   b) **Note** : If you use a user session instead of an admin session you will have to ensure the user account used has all the appropriate access to add and view videos.
6) **User login id to use when using the USER secret or login/password connection type**
   a) This is only needed if you are using a USER secret instead of an ADMIN secret.
7) **Password to use if you wish to use a USER secret connection type**
   a) This is only needed if you are using a USER secret instead of an ADMIN secret.
8) **Time, in minutes, a video is allowed to take to get uploaded to Kaltura video platform**
   a) If the upload takes more than this amount of minutes if will be stopped.

Kaltura conenction parameters

If you are using Kaltura and wish to integrate with the activity stream you must supply either a:
1. ADMIN key only.
2. USER key / User login combination.
3. User login / password combination.

If you entered a User login and password we will establish a User Login / password type of connection.
If you did not enter a password but entered a USER key and a Login id we will establish a USER key type of connection.
If you did not enter a password and a USER key but entered an ADMIN key then we will establish an ADMIN key type of connection.

Url to the Kaltura platform API.

> http://www.kaltura.com

Your partner ID that identifies you to the Kaltura platform.

> 0

Enter the ADMIN secret if you wish to use an ADMIN connection to the Kaltura platform.

Enter the USER secret if you wish to use a USER connction to the Kaltura platform. You will need to specify the user to act as in the Username field bellow.

User login id to use when using the USER secret or login/password connection type.

Enter the user password to use if you whish to use a particular user account to access the Kaltura platfrom.

Time, in minutes, a video is allowed to take to get uploaded to Kaltura video platform.

> 10

Kaltura integration parameters

1) **Url template to use when generating the link that will be displayed to users in the system**
   a) This is the link that users will get if they directly click on the video link in the stream
   b) By default we create the link to media space. If you want the link to go to media space you will have to change it by replacing <yourhost> with the value appropriate for your company.
2) **Url template to use when rendering the Kaltura player in the stream**
   a) This is the link to the actual video file.
   b) **Note** : The you should not have to change the default.
3) **Default player id to use when generating links to a video uploaded to Kaltura video platform**
   a) This is the player id tha will be placed in the link created when the video will be added to the stream.
4) **Always use the default player for Kaltura videos in the stream**
   a) This will cause the playback to always use the default player you specified and ignore any player id in the link.
5) **Tags that will automatically be added to videos uploaded to Kaltura video platform**
   a) The video module can add tags to the video added to Kaltura. Tags specified in this field will always be added to the video.
   b) Separate tags with a space.
6) **Text that will be associated with activity stream entries created when a new video is added**
   a) This is the actual stream entry text that will be created when the video is added.
   b) The text can contain place holders that are replaced by their appropriate value at run time
      i) {postText} – Text specified as post text in the create video dialog
      ii) {videoTitle} – Title specified in the create video dialog
      iii) {videoUrl} – The url to the video, this is the url specified in section 1). This place holder must be somewhere in the text.
7) **Show Activity Stream Text field**
   a) Determines if the activity stream text field is showed in the create video dialog
   b) The data in this field is the complete text that will be set for the activity stream.
   c) By default the data in this field will show what you entered as the default text associated with the activity stream.
      i) **Note**: If it's not showed the activity stream text will be the default text.
8) **Show Post Text field**
   a) Determines if the post text field is showed in the create video dialog.
   b) The data in this field will be placed in the stream text and replace the place holder {postText}
   c) **Note:** If you do not include {postText} in the activity stream text this field will not show anywhere.
9) **Show Video Description Field**
   a) Determines if the video description field is showed in the create video dialog.
   b) This field sends the video description to Kaltura.
10) **Show Video Player ID field**
   a) Determines if the Player Id field is showed in the create video dialog.
   b) This field allows the user to specify which player id to use when creating the link to the video.
   c) If this field is not showed the default player id is used
11) **Show Video Tags field**
   a) Determines if the tags field is showed.
   b) The tags a user will enter in this field will be in addition to those you might have configured in the "Tags the will automatically be added to videos uploaded to Kaltura video platform" field
12) **Use White video upload icon**
   a) If selected a white video upload icon will be used instead of a gray one. This can be used if you have a theme where the gray icon does hot have enough contrast.
13) **Show video preview link in the stream**
   a) Determines if the link to the video is hidden in the stream or not.
   b) **Note** : The link will still show up in digest emails.
14) **Url to company policy**
   a) When entered there will be a link to the policy showed to the user in the create video dialog.
15) **Require disclaimer to be accepted**
   a) When selected this will force the user to select the check box that says you have read and agree with company policies before being able to submit the video.

16) Minimum length user id set for video creator should be
   a) We will send the Kaltura user id by looking up the email of the user creating the video in Kaltura. If you are using media space the id in the video is used to show the video in the users "My media" section.
   b) The field will allow you to set a size the id we send should have. By default the ID will be padded with spaces before the id.
17) Padding char used to make user id the required length. User id is padded on the left.
   a) This allows you to change the padding character used.

Kaltura integration parameters

Other parameters used to generate activity stream entries for added videos.

Url template to use when generating the link that will be displayed to users in the stream.

https://<yourhost>.mediaspace.kaltura.com/media/

Url template to use when rendering the Kaltura player in the stream.

https://cdnapisec.kaltura.com/p/{kaltura_partnerId}/

Default player id to use when generating links to a video uploaded to Kaltura video platform.

☐ Always use the default player for Kaltura videos in the stream.

Tags that will automatically be added to videos uploaded to Kaltura video platform.

Text that will be associated with activity stream entries created when a new video is added.

{postText}
Video {videoTitle} at {videoUrl} was added. #kaltura

☑ Show Activity Stream Text field

☑ Show Post Text field

☑ Show Video Description field

☑ Show Video Player ID field

☑ Show Video Tags field

☐ Use white video upload icon

☑ Show video preview link in the stream

Url to company policy

☐ Require disclaimer to be accepted

Minimum length user id set for video creator should be.

0

Padding char used to make user id the required length. Use id is padded on the left.

Video Expiration Settings

1) **Show video expiration field**
   a) Determines if the video expiration field is showed in the create video dialog.
2) **Metadata profile id used to store the video expiration date**
   a) If you leave it at -1 we will use the default Kaltura expiration mechanism
   b) If you enter and id then we will retrieve that metadata profile to find the field into which the expiration date will be stored.
3) **Field in the metada profile used to store the expiration date**
   a) The field from the metadata profile we retrieve where we will store the expiration date.
4) **Default number of days a video is kept before expiring**
   a) If entered it will set the expiration by default to today + number of days specified.
   b) The expiration date can be changed by the user if the expiration date field is showed. Otherwise it cannot be changed and the expiration will be automatically set.
   c) **Note**: If you want to force expiration to always be a certain number of days after the video is added by a user all you have to do is to not show the expiration field and se the default number of days a video is kept.

Video Expiration Settings

Here you can determine if the video expiration field should be showed to the user. You can configure the expiration date to be stored in a Kaltura metadata field. If no metadata field is configured it will set as the end date for the video.

☐ Show video expiration field

Metadata profile id used to store the video expiration date.

`-1`

Field in the metadata profile used to store the expiration date.

Default number of days a video is kept before expiring.

`-1`